inditone

CRM & Task Management

Leads, quotations and follow-ups — with a task engine for every department.

Lead→Order
full pipeline

WhatsApp
& email built in

Tasks
for all departments

Mobile
follow-ups

Capture enquiries, convert them into quotations and orders, and never miss a follow-up. The built-in task engine works across departments, with WhatsApp and email built in.

Pipeline

- Leads and enquiries from all sources
- Stages and probability
- Quotations and revisions
- Convert to sales order

Follow-ups

- Scheduled reminders
- Call and visit logs
- WhatsApp and email templates
- Customer history at a glance

Task engine

- Assign tasks to any department
- Due dates, priority and escalations
- Recurring tasks
- Team workload view

Insight

- Conversion funnel
- Source-wise performance
- Lost-reason analysis
- Salesperson scorecards

How it flows

STEP 1
Capture
Enquiry from any channel

STEP 2
Qualify
Assign & follow up

STEP 3
Quote
Quotation & negotiation

STEP 4
Win
Convert to order

STEP 5
Serve
Tasks & service follow-up

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