CRM Handbook

Run the sales pipeline end to end — leads, accounts and contacts, opportunities, quotes, proposals and contracts — then convert a won quote straight into an Accounting invoice.

Version 1.0 · ixlcore.com

Reference

The CRM module is where a relationship becomes revenue. It captures leads, qualifies them into opportunities against the accounts and contacts you sell to, builds priced quotes, sends proposals and contracts for signature, and — when a quote is accepted — converts it directly into an Accounting invoice so nothing is re-keyed. Marketing campaigns, a one-to-one Communicate panel, sales targets and forecasting sit alongside, giving each seller a single connected view of their pipeline.

This guide is a reference for what the module does and how the pieces fit together. It describes IXL CORE **version 1.0**.

Overview

At a glance, CRM covers these connected areas:

- **Leads** — early enquiries you capture, qualify and convert.
- **Accounts & contacts** — the organisations you sell to and the people within them.
- **Opportunities** — qualified deals moving through a stage pipeline.
- **Quotes** — priced, line-item proposals that can convert into an Accounting invoice.
- **Proposals & contracts** — sectioned documents you send, with optional AI drafting and e-signature.
- **Campaigns** — marketing efforts that leads and contacts can be attributed to.
- **Communicate** — one-to-one email or SMS sent straight from a lead or contact.
- **Reporting & forecasting** — a dashboard, summary reports, sales targets and a pipeline forecast.

Every record is scoped to a level in your organisation hierarchy (organisation, entity, branch, department or position), and every action is governed by permissions (see Access & permissions).

Leads

A **lead** is an unqualified enquiry. You can capture a first and last name, company name, email, phone, a job title, a source and the campaign it came from, and optionally link it to an existing account or contact. A lead needs at least a first name or a company name to be saved. Each lead carries an owner, and its status moves through **new !’ contacted !’ qualified**, or is set aside as **lost** or **junk**. Status is a controlled transition on its own endpoint, not a free-text field.

When a lead is ready, you **convert** it in one step: the conversion creates (or reuses) an account and contact, opens a named opportunity, and starts a quote — you supply the opportunity name and quote title, and optionally an amount and currency. The lead is then marked **converted**.

Typical steps

1. Go to **CRM !’ Leads** and create a lead, capturing name/company, contact details and source.
2. Work the lead, moving its status from **new** to **contacted** to **qualified**.
3. Click **Convert** — name the opportunity and quote — to spin up the account, contact, opportunity and quote together.

Accounts & contacts

An **account** is an organisation you sell to. It holds a name and legal name, an account type (drawn from your organisation's configurable option list), status (active, inactive or archived), email, phone, website, industry, registration and tax numbers, and a full address. An **owner** is recorded for each account.

Each account has any number of **contacts** — the people you deal with. A contact captures name, email, phone and mobile, job title, a role (from your configurable role list), and status. Communication preferences are first-class: **email opt-in**, **SMS opt-in**, a **preferred contact method** (email, phone or SMS), whether the contact is the **primary**, and the date they were **last contacted**. These consent flags govern the Communicate panel described below.

Typical steps

1. Go to **CRM !’ Accounts** and create the account with its billing and tax details.
2. Open the account and add **contacts**, marking one as primary and setting their contact preferences.

Opportunities

An **opportunity** is a qualified deal. It links to its account and contact (and the originating lead), and carries a name, description, amount, currency, a **probability** (0–100%) and an **expected close date**. It moves through a stage pipeline — **new !’ qualified !’ quote ready !’ negotiation !’ won / lost** — again via a dedicated stage endpoint rather than direct editing. Two shortcut actions, **mark won** and **mark lost** (with a lost reason), close a deal and set its outcome. Won and lost figures feed the reporting and forecast.

Quotes

A **quote** is a priced proposal built from line items. Each line has a description, quantity, unit, unit price and a tax rate (0–100%), and the module computes line totals, an optional document-level **discount** (percentage or fixed), tax and the quote total. A quote carries a title, an optional quote number, validity date, reference, terms and separate customer-facing and internal notes, plus billing and shipping addresses. It can be linked to its lead, opportunity, account and contact.

Status runs **draft !’ sent !’ accepted / declined / expired / revised**. **Sending** a quote generates a branded PDF, marks the quote sent, and — where the contact has an email address — dispatches it through the platform Communication Hub with the PDF attached; you can optionally also nudge the contact by SMS when they have a mobile number. Sends can be **scheduled** for a future time. When a quote is **accepted**, **convert to invoice** creates a draft Accounting AR invoice in the same entity: it maps each line (allocating any document discount pro-rata so per-line tax matches), sets the customer from the CRM account, applies the customer's payment terms for the due date, and links the invoice back to the quote. This is guarded so a quote can only be invoiced once.

Typical steps

1. Go to **CRM !’ Quotes**, create the quote and add line items; totals, discount and tax calculate for you.
2. **Send** the quote — a PDF is generated and emailed (and optionally an SMS nudge sent).
3. Once **accepted**, **Convert to invoice** to raise the draft AR invoice in Accounting.

Proposals & contracts

A **proposal** is a sectioned document (title plus up to 30 titled sections with body text, and terms) addressed to an account or a lead, and optionally tied to an opportunity, quote or a document template. Proposals can be previewed, **sent** for the recipient to view online, and drafted with **AI** — a per-section AI draft is generated through the platform AI gateway (metered against your AI budget). Proposal status runs **draft !’ sent !’ viewed !’ accepted / declined / expired / revised**

A **contract** is a counterparty agreement with a type (service, NDA, MSA, SLA, SoW or other), a value and currency, start and end dates, and **auto-renewal** settings (renewal term, notice days). Like proposals, it is built from titled sections and can be previewed, sent and AI-drafted. Contracts carry their own lifecycle — **draft !’ sent !’ active !’ declined / expired / terminated / renewed** with explicit **terminate** and **renew** actions. Both proposals and contracts expose a public view for the recipient, supporting online acceptance and e-signature.

Campaigns

A **campaign** groups marketing activity by type (email, event, webinar, social, advertising, referral or other), with a status (planned, active, paused, completed, cancelled or archived), start and end dates, a budget and currency, and a description. Leads reference the campaign that produced them, so you can trace pipeline back to source. Campaigns can be **archived** when finished.

Communicate

The **Communicate** panel sends a one-to-one message from a lead or contact — choose **email** (with a subject) or **SMS** and author the body. The recipient address is never taken from the browser: it is resolved server-side from the record itself, and the subject is sanitised at the boundary to prevent injection. Sends respect the contact's opt-in preferences, and SMS is the metered channel.

Reporting & forecasting

CRM includes a **dashboard** and a **summary** report, both scoped to the level and owner you choose and drawn from the same live records, so pipeline, won/lost and activity figures are consistent by construction. **Sales targets** can be set per period (month, quarter or year) and optionally per owner, and the **forecast** measures the pipeline against those targets. Settings let an administrator manage the configurable option lists (account types, contact roles and similar) that keep records consistent.

Access & permissions {#access-and-permissions}

Every CRM action maps to a specific capability — for example `crm.leads.view`, `crm.quotes.send`, `crm.quotes.convert`, `crm.opportunities.mark_won`, `crm.contracts.terminate`, `crm.forecast.manage` and `crm.settings.manage` are each separate permissions. Capabilities are grouped into roles and assigned to users, and they are enforced on every request, not merely hidden in the interface. Records also respect a **data-scope level** (organisation, entity, branch, department or position): you see and act on records within your scope, and cross-scope binding is blocked — for example, converting a lead cannot reuse an account outside the lead's scope. Converting a quote to an invoice additionally requires the Accounting invoice-create permission and its commercial entitlement.

How CRM connects

CRM is not an island. On the shared platform foundation:

- **Accounting** receives an accepted quote as a draft AR invoice — the customer is created from the CRM account and the lines, discount and tax carry across automatically.
- **The Communication Hub** delivers quote emails, proposal and contract sends, and the Communicate panel's email and SMS, subject to the tenant's email/SMS configuration and credits.
- **The AI gateway** drafts proposal and contract sections, metered against your organisation's AI budget.
- **Document templates** back branded proposals and contracts, and generated PDFs live in the shared document store.

That connection is the point: you capture a relationship once, work it through to a signed contract or a won quote, and the rest of the business stays in step.

How-to guides

Capture and convert a lead

Log an inbound lead, work its status, then convert it into an account, contact, opportunity and quote in one step.

A lead is the lightest CRM record: capture it fast, qualify it, then convert it to spin up the full sales trail.

Before you start

- Choose the company you are working in, so the lead is created at the right scope.
- Have the enquirer's name or company to hand — a lead needs at least one of them.
- If you already have the account, contact or campaign in CRM, note them so you can link the lead.

Steps

1. Open **CRM !' Leads** and select **New Lead**.
2. Set the **Scope level** (required) — organisation, entity, branch, department or position. Deeper scopes require the parent to be chosen too (an entity scope needs an entity, a branch scope needs entity and branch, and so on).
3. Enter the person's details, all optional: **First name**, **Last name** (each up to 120 characters), **Company name** (up to 180), **Email**, **Phone**, and **Title**. You must supply at least a first name or a company name.
4. Optionally record where it came from in **Source** (up to 120 characters) and link a **Campaign**.
5. Optionally set the **Owner** and link an existing **Account** or **Contact** already in this company. [screenshot: New Lead form with scope and contact fields]
6. Save. The lead opens at status **New** — status is set by the system, not typed on the form.
7. As you work the lead, use the status control to move it to **Contacted**, **Qualified**, **Lost** or **Junk**. [screenshot: Lead status selector]
8. When it is ready, select **Convert lead**. On the convert panel, enter the **Account name** (required unless you are reusing an existing account), the **Opportunity name** (required) and the **Quote title** (required). Optionally add contact first/last name and email, an **Amount**, and a three-letter **Currency** code.[screenshot: Convert lead panel]
9. Confirm the conversion.

Result

The lead is marked **Converted** and a linked **account**, **contact**, **opportunity** and **quote** are created in a single step, ready to progress through the pipeline. A converted lead can no longer change status.

Related

- Manage accounts and contacts
- Work an opportunity through the pipeline
- Create and send a quote
- CRM reference

Manage accounts and contacts

Create the companies you sell to and the people you deal with, and link contacts to their accounts.

Accounts are the organisations you sell to; contacts are the people at them — set both up so every opportunity and quote has somewhere to hang.

Before you start

- Pick the company you are working in, so records sit at the right scope.
- Decide the **Scope level** for the record (organisation, entity, branch, department or position); deeper scopes require their parents.
- Know which account a new contact belongs to if you want to link them.

Steps

Create an account

1. Open **CRM !’ Accounts** and start a new account.
2. Set the **Scope level** (required) and any parent scope it needs.
3. Enter the **Name** (required, up to 180 characters).
4. Optionally add **Legal name**, **Account type** (must be one of your configured CRM account-type options), **Status** (active, inactive or archived), **Email**, **Phone**, **Website** (a valid URL), **Industry**, **Registration number** and **Tax number**.
5. Optionally complete the address: **Street**, **City**, **Region**, **Postal code** and **Country**.
6. Optionally assign an **Owner** who is an active member of this company.[screenshot: New account form]
7. Save.

Add a contact

1. Open the account and select **Add contact** (or create one from **CRM !’ Contacts**).
2. Set the **Scope level** (required) and any parent scope.
3. Enter the **First name** (required, up to 120 characters).
4. Optionally add **Last name**, **Email**, **Phone**, **Mobile** and **Title**.
5.

Optionally set the **Role** (one of your configured contact roles) and **Status** (active, inactive or archived).

6. Optionally mark **Is primary**, set **Email opt-in** and **SMS opt-in**, and choose a **Preferred contact method** of email, phone or SMS.
7. Optionally record a **Source** and a **Last contacted** date, and link the contact to its **Account**. [screenshot: Add contact form]
8. Save.

Result

The account and its contacts are stored in this company. Contacts linked to an account appear on that account, ready to attach to opportunities and quotes.

Related

- Capture and convert a lead
- Work an opportunity through the pipeline
- Create and send a quote
- CRM reference

Work an opportunity through the pipeline

Create an opportunity, advance it through the sales stages, and mark it won or lost.

An opportunity is a live deal — create it, move it along the pipeline as it develops, and close it out won or lost.

Before you start

- Pick the company you are working in and the **Scope level** for the deal.
- Have the linked account, contact or lead ready if you want to attach them.
- Know the expected value and close date if you can, though both are optional.

Steps

1. Open **CRM !’ Opportunities** and select **New Opportunity**.
2. Set the **Scope level** (required) plus any parent scope it needs.
3. Enter the **Name** (required, up to 180 characters).
4. Optionally add a **Description** (up to 1,200 characters), an **Amount**, a three-letter **Currency** code, a **Probability** from 0 to 100, and an **Expected close date**.
5. Optionally link the **Lead**, **Account** and **Contact**, and set an **Owner** who is an active member of this company.[screenshot: New opportunity form]
6. Save. The opportunity opens at the first stage — stage and status are managed by the system, not typed on the create form.
7. As the deal develops, change the **Stage** through the pipeline: **New !’ Qualified !’ Quote ready !’ Negotiation**, then **Won** or **Lost**.[screenshot: Opportunity stage selector]
8. When the outcome is decided, mark it **Won** or **Lost**. On a loss you may record a **Lost reason** (up to 1,000 characters) explaining why.[screenshot: Mark won or lost with lost reason]

Result

The opportunity reflects its current stage in the pipeline and, once closed, shows as won or lost with any lost reason recorded. Won and open deals feed the sales dashboard and forecast.

Related

- Capture and convert a lead

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- CRM reference

Create and send a quote

Build a quote with line items and a discount, generate its PDF and send it, then hand an accepted quote to Accounting.

A quote turns an opportunity into a priced offer — add line items, apply a discount, send it out, and pass an accepted quote to Accounting.

Before you start

- Pick the company you are working in and the **Scope level** for the quote.
- Have the linked opportunity, account or contact ready if you want to attach them.
- Know the lines you want to quote and any discount you plan to apply.

Steps

1. Open **CRM !’ Quotes** and select **New Quote** (or start one from an opportunity).
2. Set the **Scope level** (required) plus any parent scope.
3. Enter the **Title** (required, up to 180 characters).
4. Optionally add a **Quote number** (letters, numbers, dots, hyphens and underscores only), a **Description**, a **Reference**, a **Valid until** date, an **Amount** and a three-letter **Currency** code.
5. Optionally link the **Lead**, **Opportunity**, **Account** and **Contact**, and set an **Owner**.
6. Add **Line items**. For each line the **Description** is required (up to 255 characters); optionally set **Quantity**, **Unit**, **Unit price**, **Tax rate** (0–100) and a **Sort order**.[screenshot: Quote line items editor]
7. Optionally set a **Discount type** of none, percent or fixed with a **Discount value**.
8. Optionally add **Terms**, a **Customer note** and an **Internal note**, plus billing and shipping addresses.
9. Save. A new quote starts in **Draft** — status is set by the system, not typed on the form.
10. To send, open the quote's **Send & PDF** panel and choose **Generate PDF & mark sent**. This generates the quote PDF and notifies the owner in-app. You may set a future **Scheduled send** time to schedule it instead, and optionally tick **notify by SMS** to also nudge a contact with a mobile number.[screenshot: Send and PDF panel]
11. As the customer responds, move the quote's **Status** through **Sent**, **Accepted**, **Declined**, **Expired** or **Revised**.

Result

The quote carries its line items, discount and current status, with the generated PDF recorded against it. Once a quote is **Accepted**, use **Convert to invoice** to hand it to Accounting, which creates a draft AR invoice from the lines — you then review and issue it from **Accounting !’ Receivables**

Related

- Capture and convert a lead
- Manage accounts and contacts
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Draft and e-sign a proposal

Create a proposal for an account or lead, draft its sections (optionally with AI assistance), and send it out for e-signature.

This guide walks you through building a sales proposal in the CRM and sending it to the customer to review and sign.

Before you start

- You have permission to create and edit CRM proposals.
- The proposal must address either an **account** (with a contact) or a **lead** — one recipient side is required.
- To send for signature, the chosen contact or lead needs an email address on file.
- AI section drafting is gated and metered; your organisation needs AI budget available to use it.

Steps

1. Go to **CRM !' Proposals** and start a new proposal.
2.
3. Complete the proposal fields:
4. Build the body from **sections** (up to 30). Each section takes:
   Add overall **Terms** if needed — optional, up to 20,000 characters.

[Screenshot: the proposal editor with its sections]

5. To speed up writing, use **AI draft** on a narrative section. Choose **draft** or **rewrite** mode; the result is advisory — review and edit it before use. This consumes AI units and is unavailable when your AI budget is exhausted.

[Screenshot: the AI draft panel for a section]

6. Preview the proposal, then choose **Send**. Only a draft proposal can be edited or sent. The system generates the PDF and raises a signature request via the platform Signing engine, addressed to the linked contact (or lead) email.

Result

The proposal moves to **Sent** and the recipient receives an e-signature request to review and accept it. The send is recorded on the audit trail.

Related

- Manage contracts and renewals
- Message a customer by email or SMS
- CRM reference

Manage contracts and renewals

Draft a contract against an account, send it for e-signature, and terminate or renew it through its lifecycle.

This guide covers creating a CRM contract, sending it out for signature, and handling its termination and renewal.

Before you start

- You have permission to create and edit CRM contracts.
- A contract always needs a **counterparty account** — this is required.
- To send for signature, the contract's contact (or account contact) needs an email address on file.
- Terminating a contract requires the contract-terminate permission; renewing requires the contract-renew permission.

Steps

1. Go to **CRM !’ Contracts** and start a new contract.
2.
3. Complete the contract fields:
4. Set the renewal terms (all optional):
   Build the body from **sections** (up to 40), each with a required **Title** (up to 160 characters) and an optional **Body** and **Key**. Add overall **Terms** if needed.

[Screenshot: the contract editor with renewal settings]

5. Preview the contract, then **Send** it for signature. The PDF is generated and a signature request is raised via the platform Signing engine to the counterparty; the contract moves to **Sent**.

[Screenshot: sending a contract for signature]

6. To end a contract early, choose **Terminate** — available only on an active or sent contract. It moves to **Terminated**.
7. To renew, choose **Renew**. This creates a new **draft** contract copied from the original (titled with "(renewal)") and links it back to its source; the original is marked **Renewed**.

Result

The contract progresses through draft, sent, active, terminated or renewed states. Terminations and renewals are recorded on the audit trail, and renewals produce a fresh draft ready to edit and re-send.

Related

- Draft and e-sign a proposal
- Message a customer by email or SMS
- CRM reference

Message a customer by email or SMS

Send a one-to-one email or SMS to a lead or contact, with the recipient resolved from the record and opt-outs respected.

This guide shows you how to send a personal, one-off email or SMS to a lead or contact from their CRM record.

Before you start

- You have permission to communicate with CRM leads and contacts.
- You send from a specific **lead** or **contact** record — the recipient's email address or number is taken from that record, never entered by hand.
- The record must hold a valid email (for email) or phone number (for SMS).
- Recipients who have opted out are suppressed; SMS also consumes messaging credits.

Steps

1. Open the **lead** or **contact** and open its **Communicate** panel.
2. Choose the **Channel** — required. Either **Email** or **SMS**.
3. Complete the message:

[Screenshot: the Communicate panel with channel, subject and body]

4. Send the message.

The recipient address or number is resolved server-side from the record itself. Before sending, the system checks the recipient has not opted out — an email address that has opted out or a number that has replied STOP is blocked and cannot be contacted. A repeated identical send within the same minute is treated as a single message.

[Screenshot: an opted-out recipient blocked from sending]

Result

The message is handed to the platform communication hub for delivery, and the send (or simulation, where live sending is not enabled) is logged on the record's timeline. SMS sends draw down your messaging credits.

Related

- Draft and e-sign a proposal

- Manage contracts and renewals
- CRM reference