

Spell CRM Pro

Full Feature Catalog

The complete list of modules, features, and capabilities.

This document is a reference for every module and feature included in Spell CRM Pro. Sections are grouped by functional area. Each item is a shipped capability, not a roadmap promise. Use it as a checklist during evaluation, a handover for your team, or a procurement attachment.

SALES EXECUTION

Core sales tools that cover the full cycle from lead capture to closed deal to renewal.

Contacts	Full contact records with custom fields, tags, social links, and relationship mapping.
Accounts	Company records with hierarchy, territory, industry, revenue, and employee data.
Leads	Inbound and outbound lead capture with status workflow, source tracking, and auto assignment.
Lead Scoring	Configurable point based scoring driven by demographic fit and engagement signals.
Deals and Pipelines	Multiple visual pipelines with custom stages, win probability, and forecast category.
Pipeline Templates	Reusable stage templates that teams can clone when launching a new motion.
Stage History	Full audit of every stage transition with time in stage metrics.
Products Catalog	Reusable product and service items with prices, SKUs, taxes, and currency.

Quotes	Create, version, send, and accept quotes tied to deals. Includes line items and discounts.
Electronic Signatures	Built in signature requests that embed on quotes and contracts.
Forecasting	Weighted pipeline and category based forecasts, rollups by rep, team, and territory.
Territory Assignment	Rule based or manual territory mapping for contacts, accounts, and leads.
Sales Targets	Monthly, quarterly, and annual targets per rep or team with live attainment.
Achievements	Milestone and gamification layer for closed won wins and activity streaks.

CUSTOMER SERVICE AND SUPPORT

Everything needed to run a help desk without adding a second product.

Tickets	Queue based ticketing with priority, status, SLA, and assignment rules.
Ticket Comments	Threaded internal and external conversations on every ticket.
Knowledge Base	Authoring, categorization, and publishing of articles for agents and customers.
Customer Portal	Self service area where customers can log tickets, view history, and read articles.
Surveys	Post interaction CSAT, NPS, and custom surveys with automated follow up.
Messenger	Real time internal chat between agents on the same ticket or account.

MARKETING AND CAMPAIGNS

Outbound, inbound, and attribution tooling in one place.

Campaigns	Track inbound and outbound campaigns with budget, members, and ROI.
Email Campaigns	Bulk send to segmented lists with tracking, AB testing, and bounce handling.
Sequences	Multi step email cadences with delay rules, conditional branches, and auto pause on reply.
Web Forms	Embeddable forms that capture leads directly into your CRM with UTM carryover.
Landing Pages	Simple landing page builder for campaign specific capture.
List Segmentation	Static and dynamic segments with saved filters.
UTM and Source Attribution	Automatic UTM capture and full funnel source reporting.

COMMUNICATIONS

A complete channel stack so every conversation lives inside the CRM.

Voice Telephony	Browser based softphone with smart inbound routing. See the Telephony sheet.
Call Recording	Optional automatic recording with searchable transcripts where permitted.
Missed Call Inbox	Dedicated queue for unhandled inbound calls with one click callback.
Email Sync	Two way Gmail and Outlook sync with account per user isolation.
Email Templates	Reusable templates with merge fields, shared libraries, and personal drafts.
Email Tracking	Open, click, and reply tracking per message and per campaign.
Calendar	Bidirectional calendar sync with Google and Microsoft 365.
Meeting Scheduler	Public booking links with availability rules and round robin.
Notifications	Real time in app and email notifications with per user preferences.

SMS

Outbound SMS through Twilio with opt out handling (optional).

ACTIVITIES AND PRODUCTIVITY

The day to day working layer that sits on top of every record.

Tasks

Assign, track, and complete tasks with due dates, priority, and reminders.

Activity Timeline

Unified history of every call, email, meeting, note, and change per record.

Notes

Rich text notes attached to any object with mentions and file attachments.

Comments

Threaded comments on deals, tickets, and other records.

Document Library

Centralized file storage with folders, versioning, and access control.

Quick Search

Global search across all objects with type ahead and recent items.

Time Tracking

Per user and per project time logs with approval workflow.

Timesheets

Weekly timesheets with approver review and export.

Attendance

Clock in and clock out logs with shift configuration.

FIELD SALES AND MOBILE

Designed for reps in the field. Offline tolerant and GPS aware.

Mobile Experience

Responsive mobile UI covering contacts, deals, tasks, and calls.

GPS Check Ins

Location stamped check ins at customer sites with photo capture.

Route Planning

Build daily routes across multiple accounts with map optimization.

Location Logs

Optional location history for field teams with privacy controls.

Offline Capture

Activity capture that queues and syncs when connectivity returns.

AUTOMATION AND WORKFLOWS

No code automation that replaces repetitive manual steps.

Workflows	Trigger based automation with conditions and multi step actions.
Automation Rules	Field updates, task creation, email sends, and owner changes on event triggers.
Scheduler	Recurring jobs and time based triggers for periodic work.
Sequences	Multi step outbound cadences with conditional logic.
Lead Assignment Rules	Round robin, territory, or custom logic for new lead routing.
Duplicate Detection	Automatic and on demand duplicate detection for contacts, leads, and accounts.

ANALYTICS AND REPORTING

Live dashboards and ad hoc reports across every object.

Dashboards	Live tiles and charts with drill down, per user or shared.
Reports	Drag and drop report builder with grouping, filters, and export to PDF or Excel.
Saved Reports	Save and share reports across teams with scheduled email delivery.
Forecasting	Live pipeline and category based forecast with commit, best case, and worst case.
Activity Leaderboard	Daily and weekly leaderboards for calls, emails, and meetings.

CUSTOMIZATION AND EXTENSIBILITY

Tailor Spell CRM Pro to how your business actually works.

Custom Fields	Add fields of any type to any record with per role visibility.
Custom Objects	Build your own top level objects with fields, relationships, and permissions.
Custom Views	Save filtered and sorted views per user or team.
Field Permissions	Per role read, write, and required rules at the field level.
Layouts	Configure the order and grouping of fields on detail pages.
Public API	REST API for every object with pagination, filters, and bulk endpoints.
Webhooks	Outbound event notifications for every object lifecycle event.
API Keys	Per user API keys with scoping for machine to machine access.
Import and Export	Bulk CSV import with validation and mapping. Full export of any object.

INTEGRATIONS

Connect to the tools your team already uses.

Gmail and Outlook	Native two way email sync with full thread attribution.
Google and Microsoft Calendar	Bidirectional meeting sync.
Twilio Voice	Built in telephony provider with bring your own number support.
Zapier	Thousands of app connections through native Zapier triggers and actions.
File Storage	S3 compatible storage for all uploads with configurable buckets.
SSO Providers	SAML 2.0 and OAuth including Google Workspace, Microsoft 365, and Okta.
Webhook Consumers	Any endpoint that accepts JSON can receive real time events.

AI CAPABILITIES

Optional AI features that accelerate common tasks without sending your data to third party consumer models.

AI Assistant	Inline assistant that summarizes records, drafts emails, and suggests next steps.
Call Transcription	Automatic transcripts of recorded calls with keyword extraction.
Email Drafting	AI drafted replies and templates based on contact context.
Lead Scoring Assist	Model driven propensity scores that augment rule based scoring.
Duplicate Suggestions	AI assisted duplicate detection beyond exact matching.

SECURITY AND ADMINISTRATION

Enterprise grade controls available on every plan.

Role Based Access	Predefined and custom roles with granular permissions.
Field Level Permissions	Hide or restrict individual fields per role.
Two Factor Authentication	TOTP and recovery codes for all users.
Single Sign On	SAML 2.0 and OAuth for enterprise identity providers.
Audit Log	Immutable record of every meaningful change with actor, timestamp, and diff.
Recycle Bin	Soft delete recovery window for all top level records.
Data Residency	Deploy in US, EU, or APAC regions.
Encryption	TLS 1.2 or higher in transit. AES 256 at rest for data and backups.
Credential Vault	Per organization encryption keys for sensitive integration secrets.
IP Allow Listing	Optional restriction of logins to allowed IP ranges (enterprise).

PLATFORM AND INFRASTRUCTURE

How Spell CRM Pro is built and where it runs.

Cloud Native	Runs on AWS with horizontal scaling on ECS or Kubernetes.
Self Hosted Option	Full stack shippable via Docker or Helm to your own cloud.
PostgreSQL	Managed RDS with point in time recovery and automated backups.
Redis	Caching and real time fanout.
S3	Object storage for attachments and recordings.
Observability	Structured logs, metrics, and alerting hooks ready for CloudWatch or Datadog.
Backups	Daily automated backups with configurable retention.
High Availability	Multi AZ RDS and stateless app tier for graceful failover.
Uptime SLA	99.95% on managed cloud plans.

SUPERADMIN AND MULTI TENANT

For operators running Spell CRM Pro as a platform for other organizations.

Organizations	Full multi tenant model with per org isolation of users, data, and configuration.
Superadmin Console	Cross org administration, usage metering, and support impersonation.
Invitations	Bulk user invite flows with role and team assignment.
Billing Hooks	Usage metrics exposed for plugging into your billing platform.

Ready to see Spell CRM Pro in action?

Book a 20 minute demo with the Spell Solutions team. See how a unified customer platform can streamline your sales, service, and support.

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