

The CRM that runs the work. Not just stores it.




PipelineIQ is the all-in-one customer platform built for the way modern operators actually run a business — from a single-location cafe to a 60-rep B2B sales team. Iris AI drafts every message in your voice, the review engine turns happy customers into 5-star public reviews, and every quote, invoice, and payment is handled in one place. **Solo from \$59/mo · Plus \$89/mo · Starter from \$100/seat.**

WHAT OPERATORS SEE IN 90 DAYS

<p>5x MORE GOOGLE REVIEWS</p>	<p>+12% REPEAT VISIT RATE</p>	<p>3 hrs SAVED PER REP PER WEEK</p>	<p>5 min SETUP TIME</p>
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THREE PILLARS

Built around how a business actually works.

 <p>Iris — your AI assistant Drafts emails, summarizes calls, scores deals, learns your business voice. Edits any field with 11 rewrite actions. Approval-gated memory — Iris only remembers what you confirm.</p>	 <p>Pipeline that runs itself Multi-step drips, deal stage automation, weighted forecasts, lead routing, and SLA timers. Configure once, the system catches what reps miss.</p>	 <p>Reviews + customer book Auto-fire review requests after every visit or won deal. Routes Google / Yelp / Facebook publicly, captures private feedback when guests aren't happy.</p>
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EVERYTHING IN THE BOX

What you get on day one — included on every tier.

Most CRMs charge add-on after add-on for what should be standard. PipelineIQ ships these on every plan, including Solo: Iris AI, the review engine, drip campaigns, quotes & invoices with online payments, Toast / Square / Resy webhooks, phone screen-pop, mobile PWA, and a 14-day free trial. No card up front.

The next 35 features → page 2.

Full feature catalog organized by category. Pricing, industries served, setup steps and FAQ on page 3.

pipelineiqcrm.com
START FREE — 14 DAYS

The full feature catalog.

Every capability shipping today, organized by category. Bold items are headline features; the rest are the quiet upgrades that make day-to-day work feel right. ✓ = included on every plan unless noted.

1 • Core CRM

- ✓ **Contacts & Companies** — two-tier model, dedup on domain + email
- ✓ **Deals + pipeline kanban** — drag-drop stages, weighted forecast
- ✓ Activity log on every record (calls, emails, meetings, notes)
- ✓ Tags, custom fields, segmentation by visit count, spend, recency
- ✓ Bulk actions — mass tag, assign, delete, export
- ✓ Merge contacts wizard with conflict resolution
- ✓ CSV + JSON import with column mapping
- ✓ Audit trail — who changed what, when

2 • Iris AI

- ✓ **Iris Brain** — long-term business memory, approval-gated
- ✓ **Iris Rewrite Anywhere** — 11 actions on any field
- ✓ Auto-drafted email replies in your business voice
- ✓ Auto deal post-mortem when a deal closes (won or lost)
- ✓ Health scoring 0–100 on every contact + deal
- ✓ AI-summarized calls, emails, and meetings
- ✓ Industry-tuned drafts (restaurant ≠ trades ≠ SaaS)
- ✓ Smart deduplication — flags likely duplicate contacts

3 • Communications

- ✓ **Unified inbox** — Gmail + Outlook two-way sync
- ✓ **SMS outreach** via Quo (OpenPhone) or Twilio
- ✓ Phone screen pop on incoming calls — see the contact instantly
- ✓ Call logging + recording (Quo / Twilio)
- ✓ Email open + click tracking with per-link attribution
- ✓ Email templates with merge fields + Iris drafts
- ✓ Auto-BCC inbound mail to log to contact timeline
- ✓ WhatsApp click-to-chat + in-app chat with @mentions

4 • Calendar & Meetings

- ✓ **Google Calendar two-way sync** — meetings on the deal
- ✓ Auto-create Google Meet link on every meeting
- ✓ Team calendar — see everyone's bookings in one place
- ✓ Booking page (Calendly-style) for prospects to self-schedule
- ✓ Meeting notes + AI-generated summaries
- ✓ Reminder SMS to no-show-prone guests 1hr before

5 • Pipeline & Deals

- ✓ **Configurable stages** — drag to reorder, exit criteria visible
- ✓ **Weighted forecast** by stage probability + close date
- ✓ Lead routing rules (round-robin, ownership, geo)
- ✓ SLA timers — Slack + email alert on breach
- ✓ Stage automation (Growth+) — auto-tag, auto-email on stage change
- ✓ Deal post-mortem auto-generated by Iris on close
- ✓ Multi-pipeline support — sales, customer success, hiring

6 • Marketing Automation

- ✓ **Multi-step drip campaigns** (welcome, win-back, nurture)
- ✓ Birthday / anniversary / N-th visit milestones
- ✓ Idle re-engagement (30/60/90-day variants)
- ✓ VIP flag — high-tipper / big-ticket auto-detection
- ✓ Lapsed-regular alert to owner
- ✓ Slow-day promo blasts to nearby regulars
- ✓ A/B testing on drip campaigns (Growth+)
- ✓ Daily morning digest, per rep — what to do today

7 • Reviews Engine

- ✓ **Auto-fire after won deal / closed check / paid invoice**
- ✓ Smart routing → Google / Yelp / Facebook public review
- ✓ Private feedback channel for unhappy customers
- ✓ Per-tenant landing page (review.yourdomain.com)
- ✓ Review analytics — request rate, response rate, star average
- ✓ Compliant by default — never gates public review behind a star

8 • Quotes, Invoices & Payments

- ✓ **Brand-aligned quote & invoice templates** with logo + colors
- ✓ Online Stripe payment links on every quote / invoice
- ✓ Document tracking — see when prospect opens the PDF
- ✓ Approval workflow + e-signature integration
- ✓ Auto-convert won quote → invoice → payment
- ✓ Net-30 / partial payment / deposit support

More features.

9 · Integrations

- ✓ **POS:** Toast · Square · Resy · Clover · Shopify
- ✓ **Email:** Gmail · Outlook · SendGrid (BYO key)
- ✓ **Phone / SMS:** Quo (OpenPhone) · Twilio
- ✓ **Calendar:** Google Calendar · iCal feed
- ✓ **Payments:** Stripe · Stripe Billing
- ✓ **Social:** Instagram · Facebook · LinkedIn (publish + analytics)
- ✓ Slack notifications · Zapier / Make webhooks
- ✓ **Webhook builder** (Growth+) — connect anything

11 · Reports & Analytics

- ✓ **Pipeline forecast** — by stage, value, close date
- ✓ Source-to-revenue attribution
- ✓ Per-rep activity dashboard (calls, emails, meetings, won)
- ✓ Email campaign performance (open, click, reply, unsubscribe)
- ✓ Customer lifetime value + repeat-rate trends
- ✓ Custom export to CSV / Excel
- ✓ Embeddable dashboards for board decks (Growth+)

13 · Industry Presets

- ✓ Restaurant · Salon · Trades / Construction · Retail · Professional Services · SaaS · Real Estate
- ✓ Each preset re-labels CRM terminology (deals → checks, contacts → guests)
- ✓ Industry-specific dropdowns (contact type, business type, pricing tier, agent role)
- ✓ Pre-loaded automation recipes per industry

INDUSTRIES SERVED


RESTAURANTS


SALONS / SPA


TRADES


RETAIL


PRO SERVICES


B2B SAAS

PRICING

TIER	BEST FOR	PRICE
Solo	1 user · up to 500 guests · 3 campaigns	\$59/mo
Plus	500+ guests · unlimited campaigns · +\$59/seat	\$89/mo
Starter	2–19 seats · founders + small teams	\$100/seat
Growth	20–59 seats · 15% per-seat savings · annual to \$70	\$85/seat
Scale	60+ seats · multi-location · SSO · custom integrations	\$75/seat

10 · Customer Portal

- ✓ **Branded portal at portal.yourdomain.com**
- ✓ Customer logs in to see their history, quotes, invoices, payments
- ✓ Quote approval + e-sign without leaving the portal
- ✓ Reseller / partner pricing tiers
- ✓ White-label options on Scale plan
- ✓ Per-customer activity log + saved notes

12 · Mobile & PWA

- ✓ **Install on iPhone or Android** as a PWA — no app store
- ✓ Push notifications + browser alerts
- ✓ Offline mode for read access (queues writes for sync)
- ✓ Mobile-optimized data entry, voice-to-text on notes
- ✓ Tap-to-call from contact view
- ✓ Camera attachments — photo invoice / receipt capture

14 · Security & Admin

- ✓ **Role-based access** — admin, manager, rep, viewer, custom
- ✓ Per-record visibility (own / team / all)
- ✓ Multi-tenant data isolation
- ✓ 2FA / TOTP authentication
- ✓ Audit log + GDPR-compliant data export & deletion
- ✓ SSO / SAML on Scale plan
- ✓ SOC 2 Type 1 readiness program