

Sales CRM

Manage leads, accounts, and opportunities with a connected CRM and real-time pipeline visibility.

SKU	BUS-SLS-CRM
Solution area	Business Operations
Works with	Campaign Performance & Marketing Analytics, Revenue Operations & Forecasting, Customer Lifecycle & Success Management, Finance & Administration
Updated	Sep 26, 2026
Datasheet	v1.0

What it is

Sales CRM (Customer Relationship Management) is a system used to manage customer relationships, track sales activity, and monitor pipeline performance. It provides a centralized platform for managing leads, opportunities, and customer interactions.

SmartSuite's Sales CRM provides a structured, scalable system to manage leads, accounts, contacts, and opportunities across the entire sales lifecycle. It enables organizations to move from fragmented spreadsheets and disconnected tools to a centralized, workflow-driven CRM system.

With a centralized system of record, sales teams gain full visibility into pipeline status, deal progress, and customer relationships.

Core capabilities

Lead Management & Qualification

Capture, track, and qualify incoming leads.

Account & Contact Management

Manage customer and prospect relationships.

Opportunity & Pipeline Management

Track deals across stages and monitor pipeline health.

Sales Activity & Engagement Tracking

Log calls, meetings, emails, and interactions.

Deal Stage & Workflow Management

Manage deal progression through structured workflows.

Sales Automation & Task Management

Automate follow-ups and activity tracking.

Pipeline Visibility & Dashboards

Provide real-time insights into deal status and performance.

Integration with Revenue & Customer Systems

Connect CRM with lifecycle, forecasting, and analytics.

Audit Trails & Data Governance

Maintain structured and reliable customer data.

The Sales Lifecycle

Step 1 Capture Leads Collect and qualify incoming opportunities.	Step 2 Manage Accounts & Contacts Build relationships and track interactions.	Step 3 Track Opportunities Move deals through structured pipeline stages.	Step 4 Execute Sales Activities Manage tasks, meetings, and engagement.	Step 5 Close Deals & Transition to Customer Lifecycle Convert opportunities into customers.
--	---	---	---	---

Who it is for

Sales Teams (AEs, SDRs) Sales Teams (AEs, SDRs)	Sales Leaders (CRO, VP Sales) Monitor pipeline performance and outcomes.	Revenue Operations Teams Optimize processes and reporting.
Customer Success Teams Access account context and history.	Marketing Teams Track lead performance and attribution.	Executive Leadership Gain visibility into revenue performance.

Works with

Campaign Performance & Marketing Analytics Provides leads and campaign attribution.	Revenue Operations & Forecasting Analyzes pipeline and revenue performance.
Customer Lifecycle & Success Management Supports onboarding and expansion.	Finance & Administration Aligns revenue data with financial planning.

Built differently. Sales CRM runs on the same relational platform as every other SmartSuite product, so its records link to the risks, controls, issues and evidence they affect, and every report reflects the current state rather than a copy.

See it working with your data

Ask your SmartSuite account team for a demo of Sales CRM configured for your organization, or read the full product entry at smartsuite.com/products/sales-crm.

Schedule a demo