Buddy CRM
sales • support • marketing

Everything in the new BuddyCRM

The complete feature list for the rebuilt product: the work queue, accounts with one history, quoting and pricing, the pipeline, Ask, Insight, marketing, automation, agents, integrations and the platform underneath.

19 areas

147 features listed

19 screens

New generation (2026) · 17 November 2026

What this is

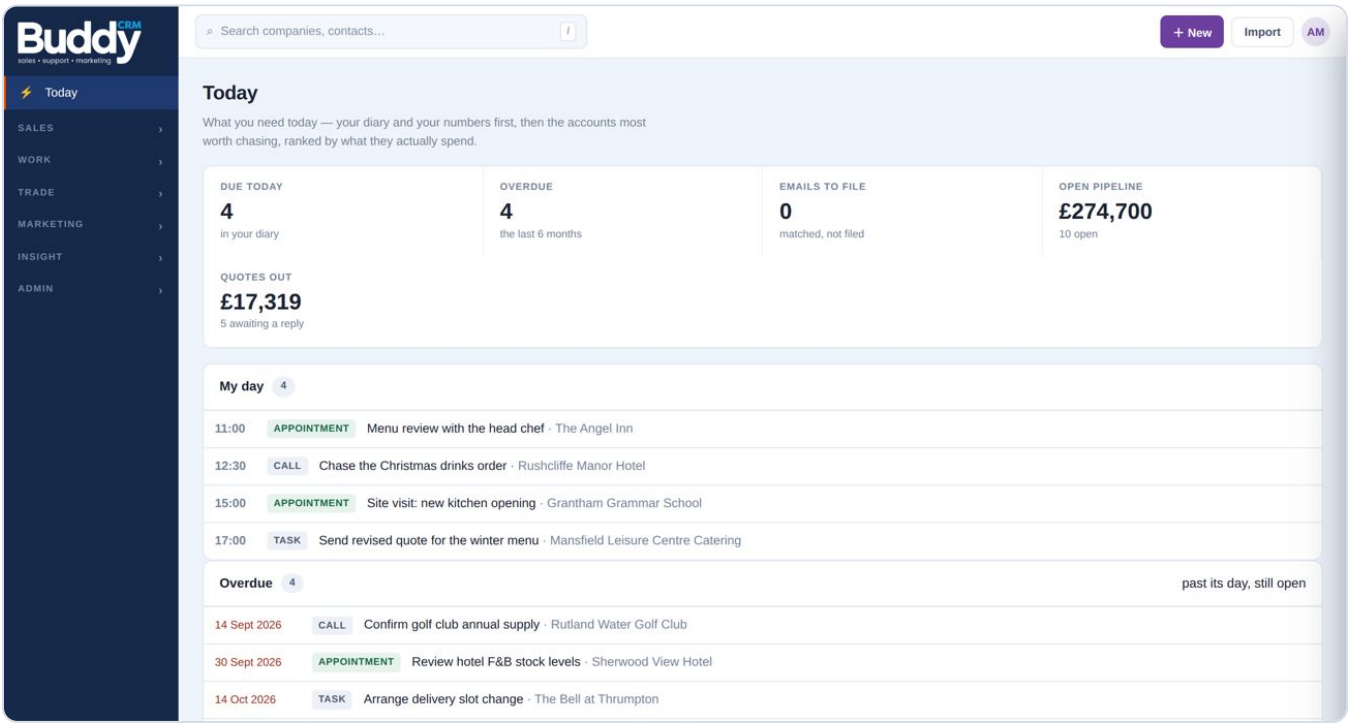
BuddyCRM has been rebuilt from the ground up as a better product rather than a port of the old one. It runs on PostgreSQL with row-level security per customer, a FastAPI back end, a front end with no build step, and one worker instead of forty services. It draws on what BuddyCRM has learned running sales teams across wholesale, distribution, manufacturing, engineering and construction since 2007, and was developed against live customer databases running to hundreds of thousands of quote lines.

This document lists what exists today, area by area, with a screenshot of each. The numbering follows the order a sales team meets the product: the day's work first, then records, trade, insight, marketing, automation, and finally administration, integrations and the platform.

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01 Today: the work queue

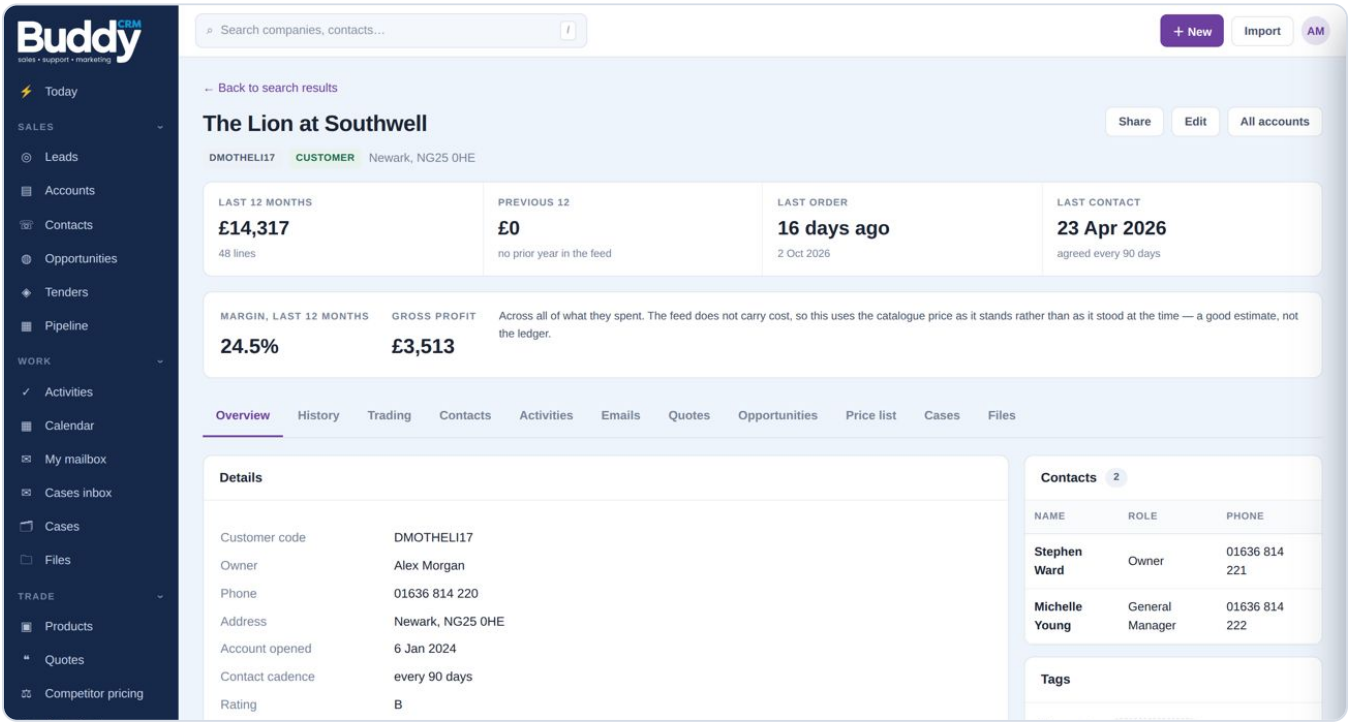
The day opens with the handful of things worth doing, ranked by the money behind them. Detection runs over every account in one query and costs nothing; the model only drafts what a person will actually read.



- Five detectors over the whole database: contact overdue against the frequency agreed for that account, quotes going cold, opportunities past their close date, activities scheduled and never done, and customers who were trading and have stopped (read from the sales feed).
- Every signal is bounded in time and in value, so a queue never opens with a £0 quote from 2010.
- Value at stake, signal count and the strongest headline per account; the rest of the evidence sits beneath.
- My numbers: due today, overdue, pipeline value and count, quotes awaiting, progress against target.
- My diary for the day and emails waiting to be filed, on the same screen.
- Agent drafts live with the work: approve, edit or discard an email next to the figures that triggered it.
- Team and owner filter so a manager sees the queue for their people.

02 Accounts, contacts and leads

One record, one history. Everything that has happened with a customer is one column, newest first, instead of eight tabs that each know a third of it.

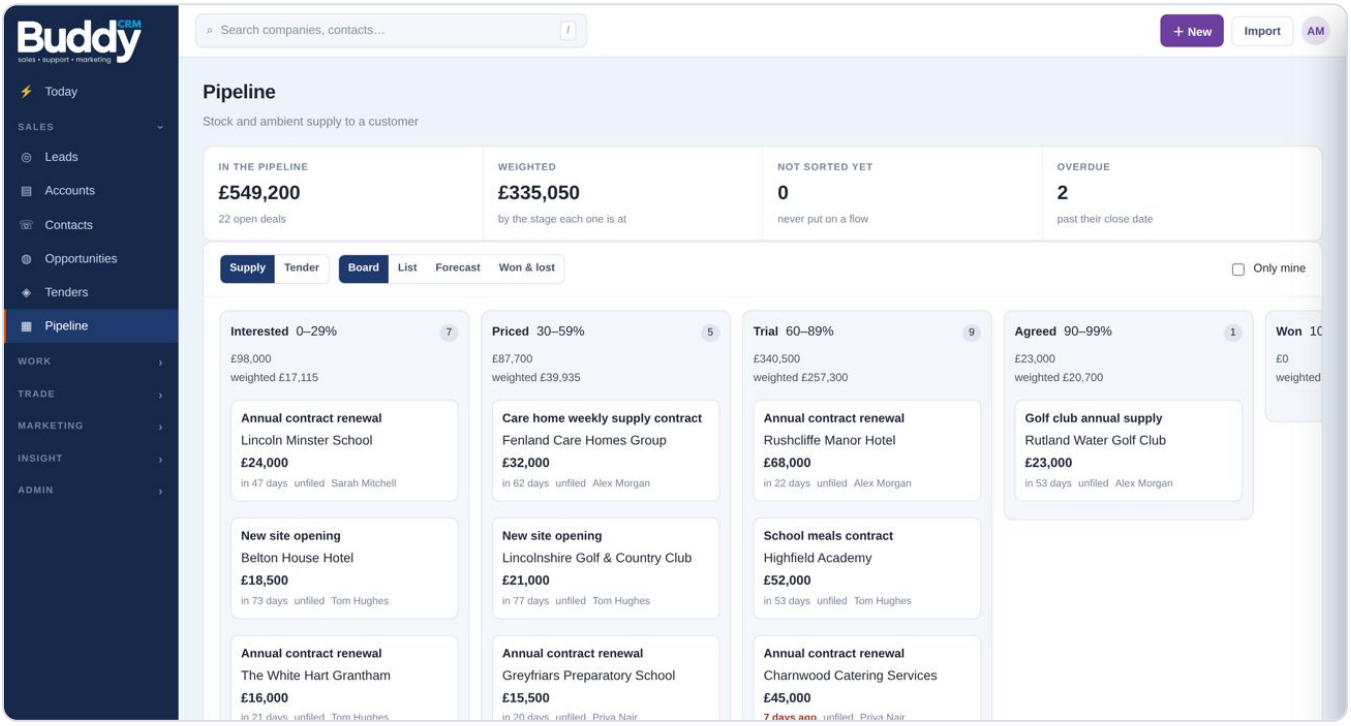


- History timeline from seven sources: activities, emails, meetings, quotes, cases, orders from the sales feed, and tenders.
- Trading tab: what they buy, last 12 months against the prior 12, last bought, and the margin on it. Excel export.
- Companies House on the account: search the register by name or number and link the company. The card then shows status, registered office, filing dates and warnings such as administration, liquidation or strike-off, read live from the register, and one click copies the registered office into blank address fields.
- Scan a business card: photograph a card at a trade show and a new lead is drafted from it, person and company, for you to check before it is saved.
- Price list on the account: the customer's Epicor price libraries and books, with a margin column from the cost at sync time, sorted by margin either way.
- A lead is an account that has not bought yet: converted in place, with no second record to merge later. Convert a lead and create the opportunity in one step.
- Contacts editable on the record, with links between contacts and the roles they hold on deals.
- Trading profile fields: account profile, rating, industry, lead source, credit terms and limit, budget year, usual spend month, current and other supplier, target margin and spend.
- Custom fields on every record type, stored as JSON with generated views, so a new field is reportable, segmentable and usable in a rule the moment it is created. Dropdowns, required fields and groups; built-in fields can be made mandatory too.
- An administrator lays out a record's tabs and groups custom fields into Overview blocks.
- Tags across accounts, leads, contacts, opportunities, activities and cases.
- Duplicate checking on contacts and companies, and a merge that repoints the whole history (quotes, prices, forms, analyses) in one transaction.
- External feeds: data from other systems shown on accounts and products, loaded by CSV or pushed to a per-feed URL.
- Files against every record, in one library.

- Record sharing: let one user see, or see and edit, another's records.
- Email tab: linked emails from connected mailboxes, a prompt to file waiting ones, and the legacy mail archive imported with attachments.

03 Opportunities, pipeline and tenders

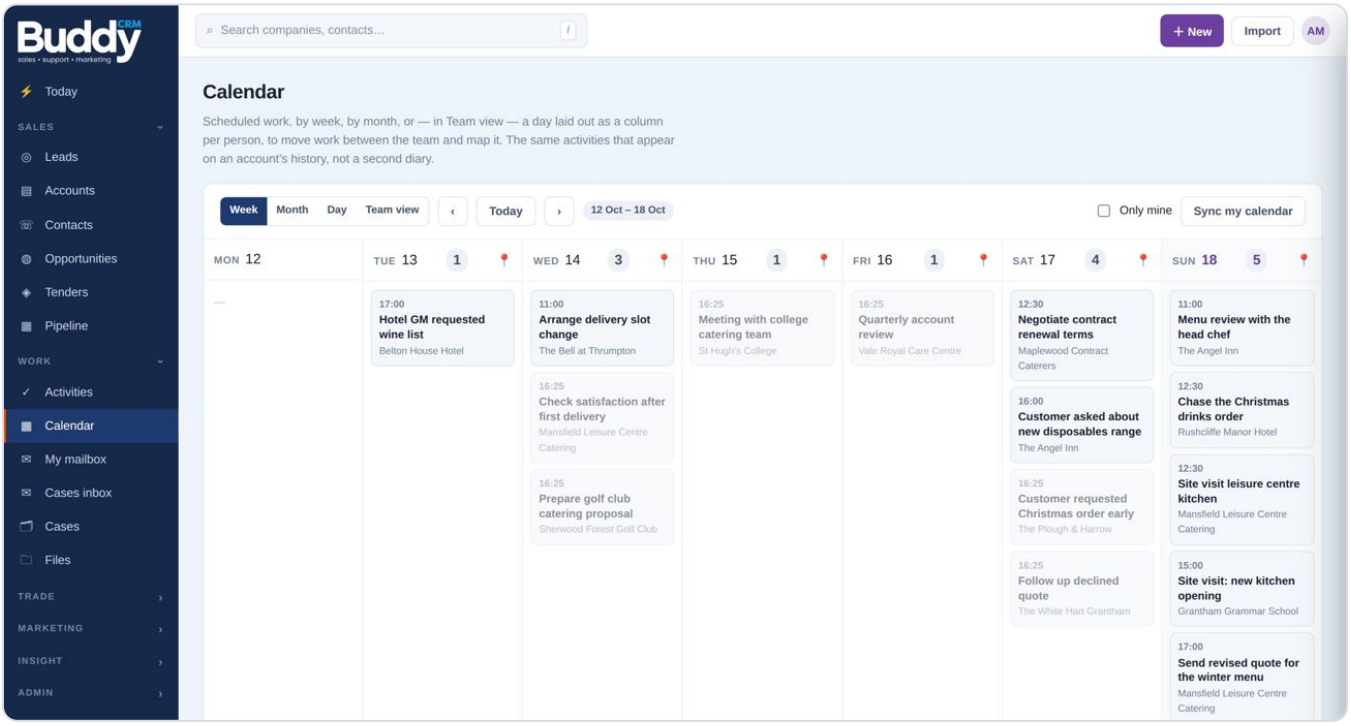
The percentage drives the board. A deal sits in the column its probability falls in, and ticking a stage question moves the card.



- A flow per kind of business, each with its own stages, stage questions, numbers and won/lost reasons.
- Probability templates: the questions that add up to a percentage, recovered from how the business actually works.
- Pipeline board partitioned by probability bands with no gaps; drag to set the figure, or answer questions and watch it move.
- Won and Lost are buttons that ask why. Losing never happens by default to a deal nobody touched.
- Lines on an opportunity, people on a deal and what they are to it, the account's contacts offered on the deal.
- Open, won and lost views; stuck-deal and forecast-by-month insight cards; period comparison in reports.
- Tenders: extract requirements and questions from the document, assess the chance of winning against the company's own profile and record on similar tenders, and draft answers from what won before. Every claim carries a verbatim quote from the tender, verified against the source.

04 Activities and calendar

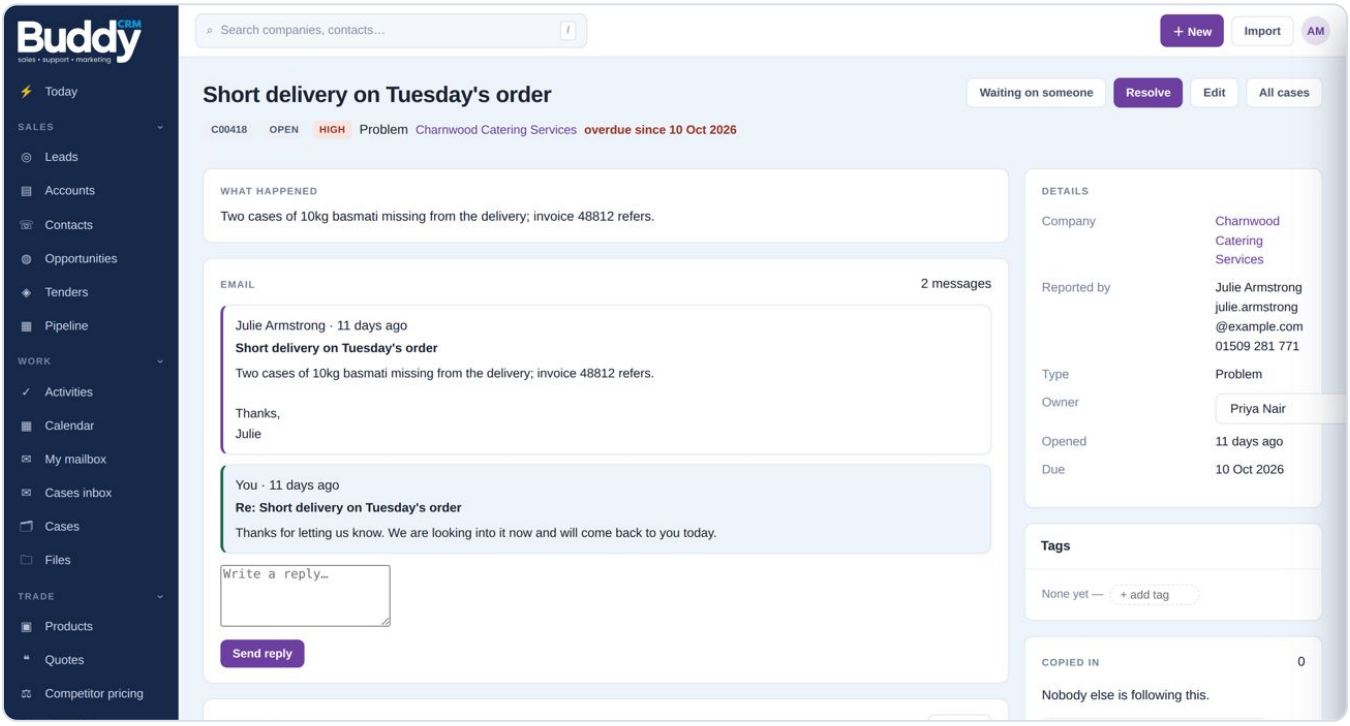
Appointments nobody sees are appointments nobody keeps, so the CRM writes to the rep's real diary and reads back only what is about a customer.



- Month calendar, a plain Day view, and a Team view: a per-person day board where a manager reassigns and reschedules by drag, and puts the day's meetings on a map.
- Two-way calendar sync with Microsoft 365 and Google, per user, with encrypted tokens.
- Reminders that email the owner ahead of the due time, once only, through the automation ledger.
- Completing an activity records how it went, and completing is undoable.
- Activity audit: who changed what, and when.
- A day's meetings, a list or a report on a map.

05 Cases and the cases inbox

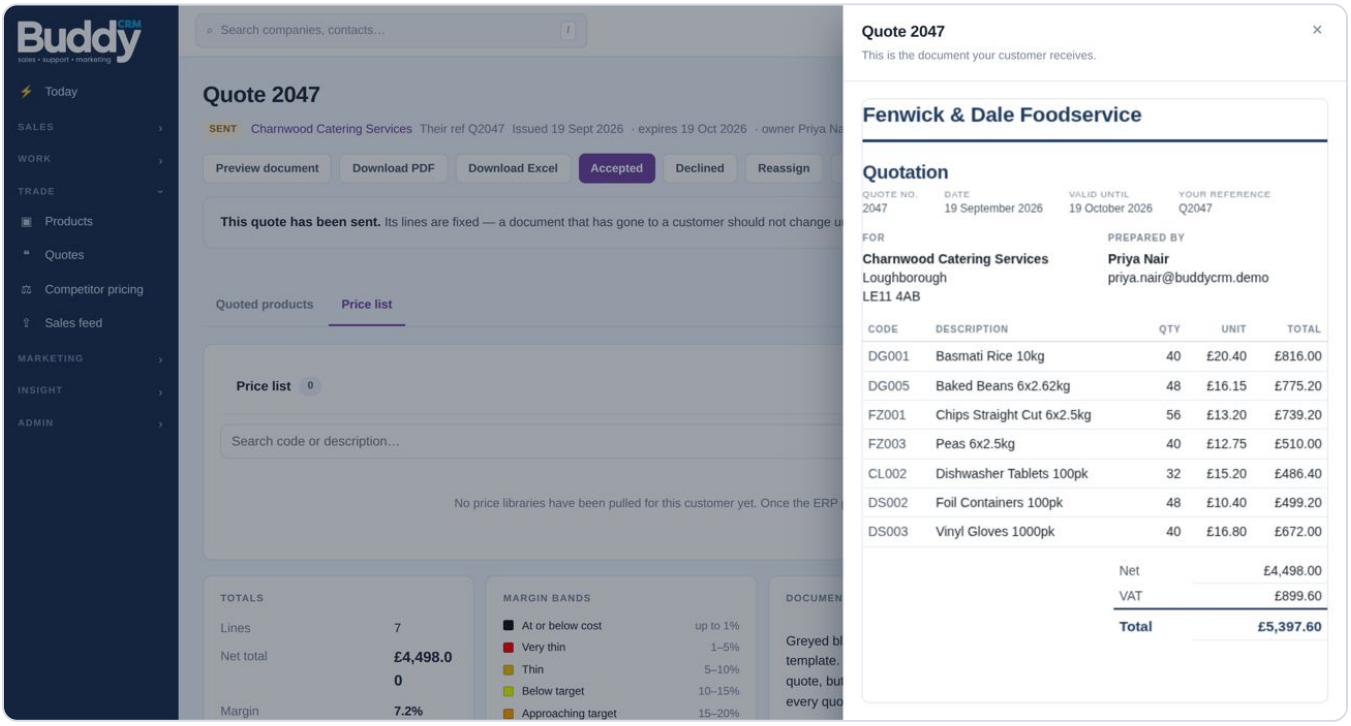
A problem a customer reports becomes a case with a thread, and email into the support address becomes a case on its own.



- Case card with a thread, sub-cases and watchers; choose the owner when opening a case.
- Cases by email: inbound mail becomes a case, replies go out from the case, and triage decides what is a case and what is noise.
- Cases by WhatsApp: a message to your WhatsApp Business number opens a case, or joins the open one for that number, and the reply goes back on WhatsApp.
- Automatic acknowledgements: an email that opens a new case can be answered at once with the case number in the subject. Never for a reply, an out-of-office, a bounce, a blocked sender, or twice in a day to one address.
- Canned replies in categories, dropped into a reply from the Insert menu, with merge tags for the first name, company, reference and your own name filled in from the case.
- Spam and blocked senders: mark a case as spam and it files under the Spam tab, out of every count, with the offer to block the sender so their next email files itself there. Undo with Not spam.
- Formatted replies and notes: bold, italic, links and lists; files already on the case attached to a reply; every message and note stamped with its date and time.
- Priorities, kinds, due dates and SLA; open/closed and SLA insight cards.
- Configurable columns on the cases list, team and owner filter, and Ask over cases.
- A cases inbox for everything customers have sent that is not yet placed.

06 Quotes, pricing and documents

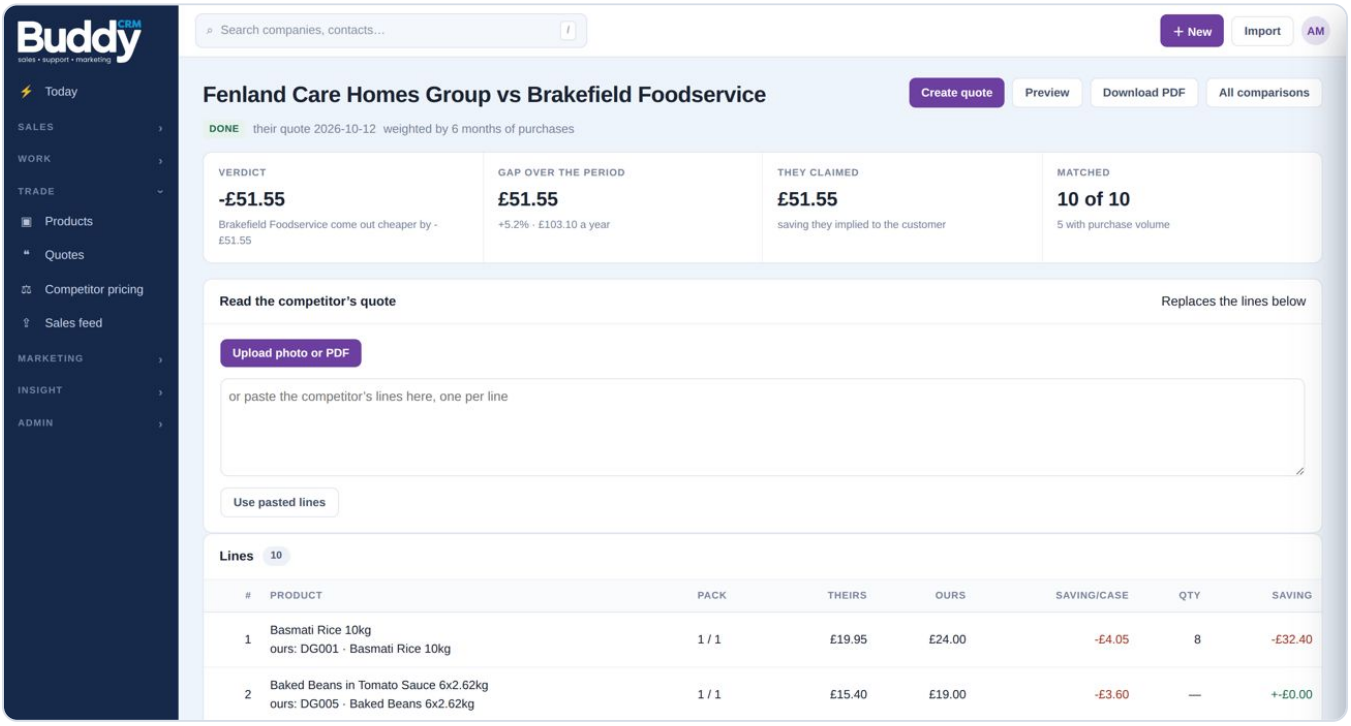
Money is decimal and lives on the server. The preview and the PDF are the same document, so what you approve is what leaves the building.



- The quote builder rebuilt: full-width lines, annotations beneath, line prices edited where they sit, grouped by category and subcategory.
- The pricing engine recovered from the evidence: off list (OL), margin (OR) and on cost (OC) modifiers, with fractional percentages that are never truncated.
- Margin from the catalogue onto every line, colour-coded bands, and one price treatment applied to every line at once.
- A flat bulk discount off every line.
- The customer's Epicor price list on the quote, with margin; push a quote into the customer's existing Epicor price book, with a line-by-line preview of what will change before anything is written.
- Competitor columns on the document, switchable per quote, and Excel export.
- Quote document built from blocks on a per-tenant letterhead: logo, colour, address, terms. Cost never enters the document model. Documents attached to the printout.
- Per-tenant currency. Quote templates with product codes and quantities, priced when the quote is made.
- Paste an order list, or photograph it, or drop in the customer's PDF: it is read, matched against the catalogue and confirmed before it becomes lines. The model only transcribes; the match is checked against real rows.
- Quote conversion insight card, and quotes going cold on the Today queue.

07 Competitor pricing analyser

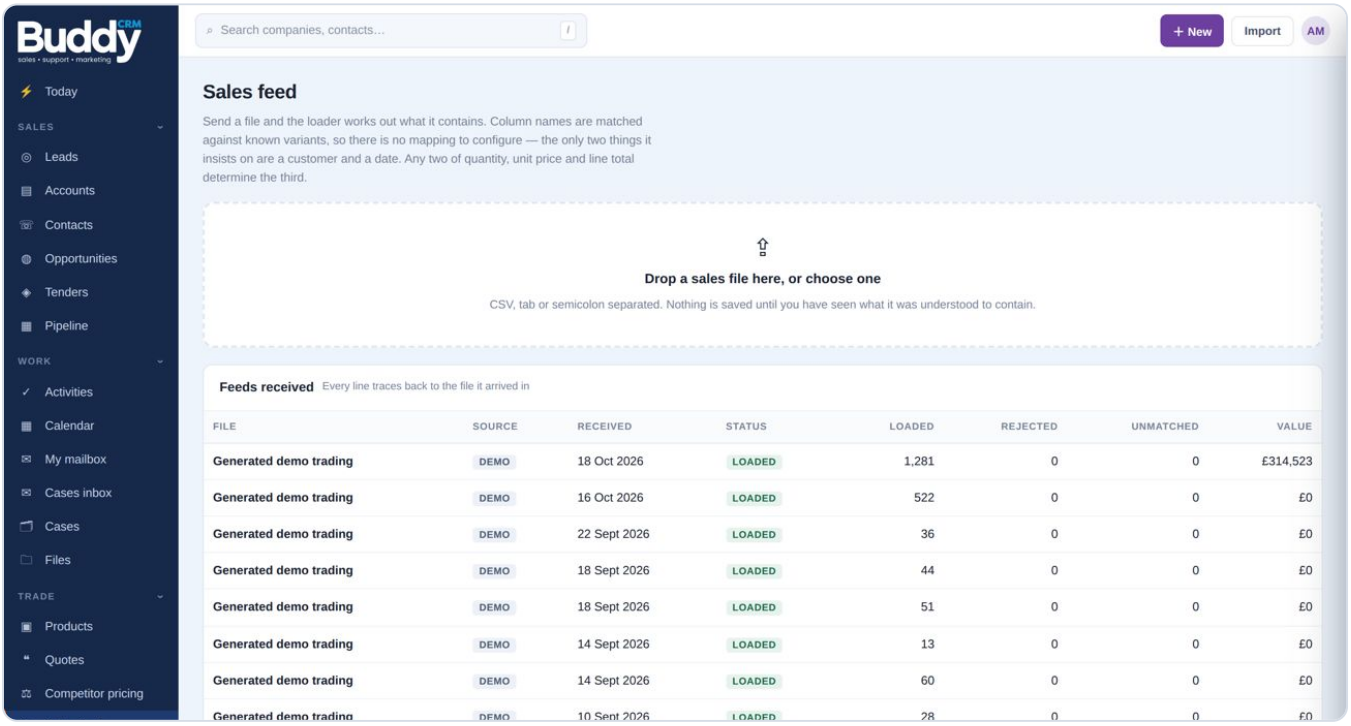
Drop in a rival's quote and find out whether they are really cheaper, line by line, over the quantities the customer actually buys.



- Reads a competitor quote from a PDF or a photo, including long ones.
- Matches each line to our catalogue, with pack sizes rescaled so the comparison is like for like.
- Weights every saving by the customer's real purchase history and annualises it.
- Checks the competitor's own 'your current price' claim and flags where it is wrong, which is the rep's strongest rebuttal.
- Turns the analysis into a quote in one step.

08 Products, sales feed and trading

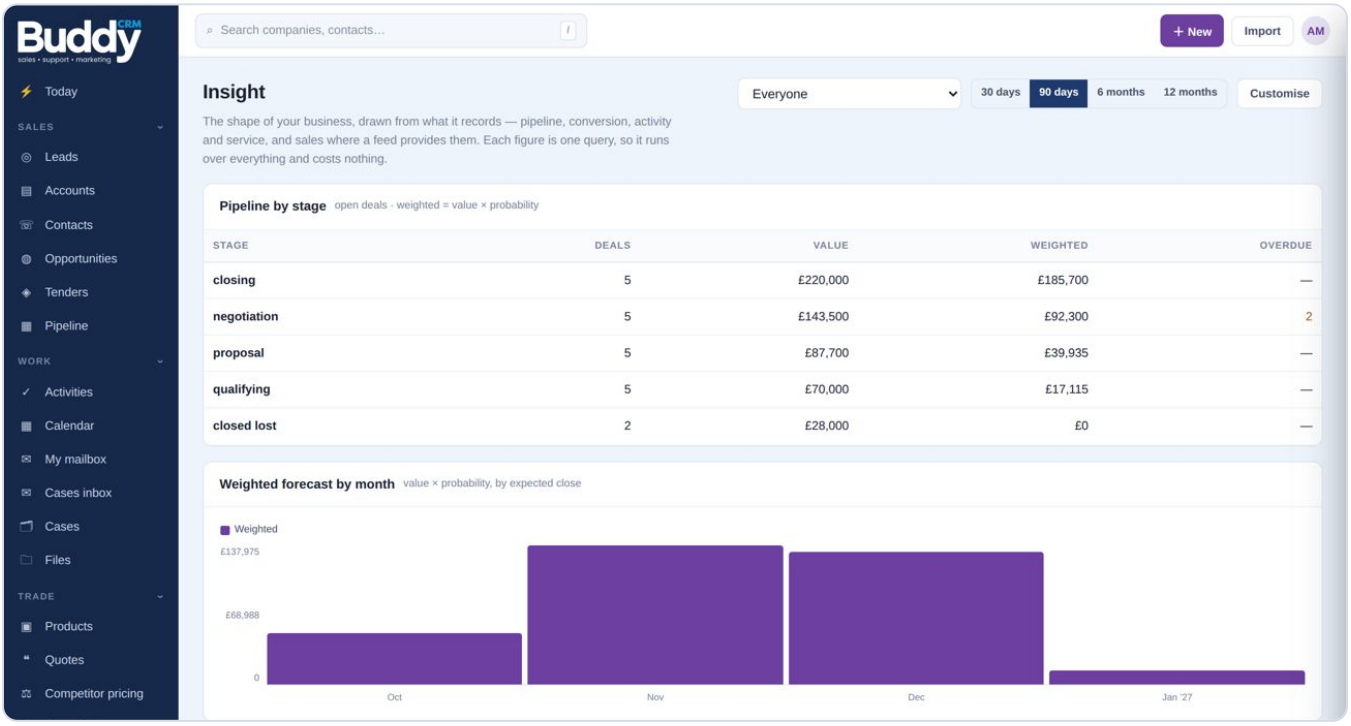
The sales feed is the one source that knows whether a customer is actually buying. It drives the work queue, insight, targets and margin.



- Catalogue import with categories and subcategories, editable products, attachments and product feeds.
- Sales feed upload in two steps: a preview that reports what it understood before anything is written, then the import. Any ERP export, matched on column synonyms.
- Prophet 21 (Epicor) reads itself into the feed on a schedule: sales and products, incremental, with corrections and credits resolved by construction. Manually loaded history always wins.
- The catalogue may mirror the ERP: retired, never deleted.
- Trading story told as changes, not a table; the invoices foldable back out of the feed; what changed over a period you choose.
- Costs: a cost setting speaks for all history, and 'no cost held' is not the same as free.
- A subscription without an ERP can take sales from won opportunities instead.

09 Insight

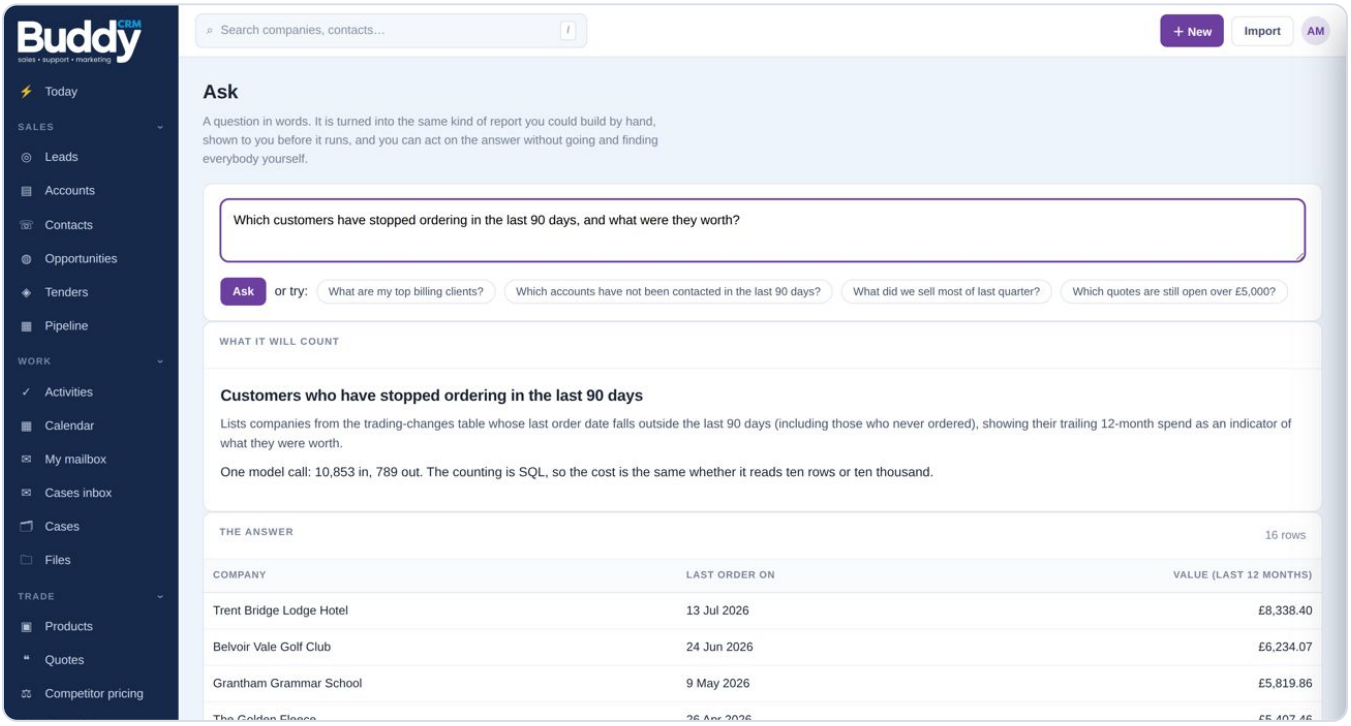
A catalogue of cards, each declaring the data it needs, so a tenant only ever sees cards it can fill.



- Trading cards: overview, trend, movers, margins by period, products, churn, cadence.
- Pipeline cards: pipeline by stage, forecast by month, win/loss, stuck deals, quote conversion.
- Front-of-funnel cards: lead funnel, leads by source, campaign engagement.
- Activity and service cards: activity by rep, activity trend, cases open and closed, case SLA.
- An administrator hides and reorders cards per tenant; see-more on every card; team filter.
- Scoped to what the viewer may see, business-wide for those who may see it all.

10 Ask: a question in words

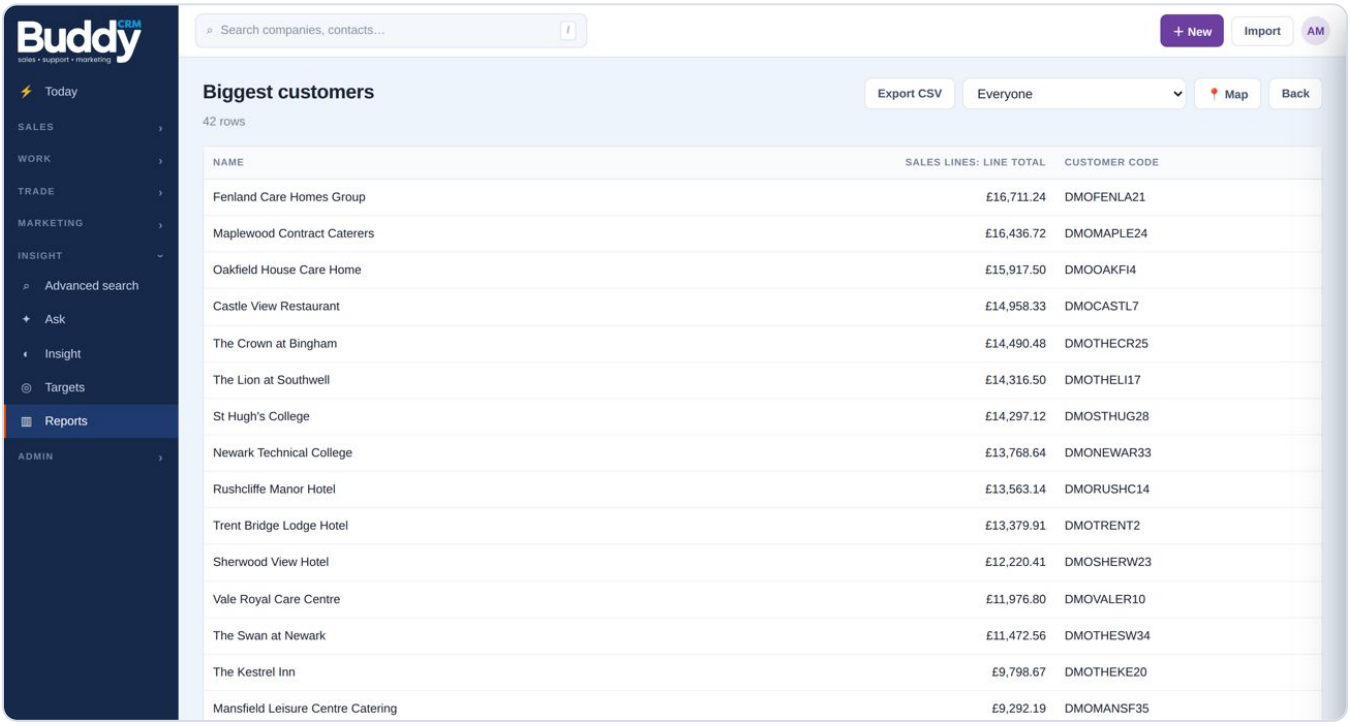
Ask what you would ask an analyst, and act on the answer. The model plans; it never writes SQL.



- Plain-English questions over accounts, contacts, opportunities, quotes, activities, cases, sales and campaigns.
- The model fills in the same report specification the report builder produces, validated field by field against the registry; unknown keys are refused. Tenancy, permissions and record scope apply exactly as for a hand-built report.
- Act on the answer: book calls for the owners of every account in the result.
- 'Not contacted in N days', fixed calendar periods, in-period and not-in-period comparisons.
- Ask history: past questions and what was done with them, with the SQL kept for support.
- The same Ask is available to AI assistants through the hosted MCP endpoint.

11 Reports and targets

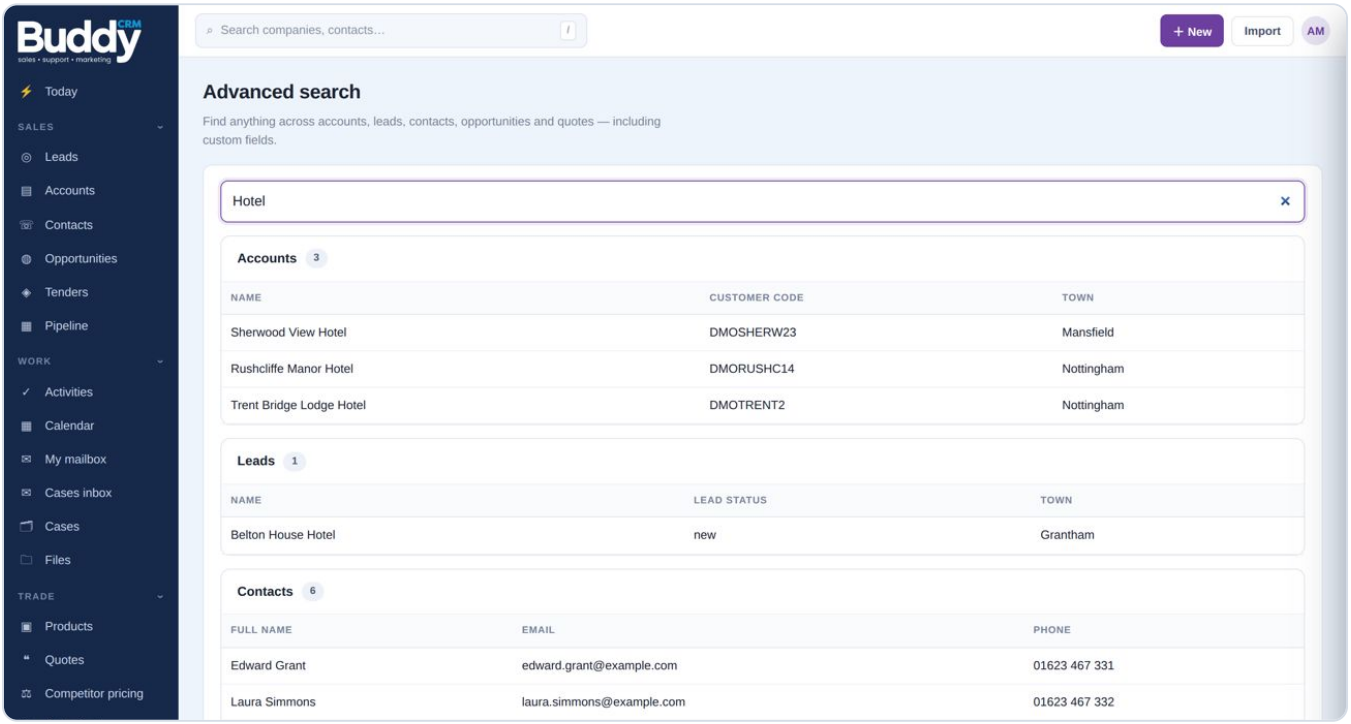
One registry is the semantic layer: the report builder, list columns, audiences, rule conditions and Ask all read the same fields.



- Report builder over 12 modules and 278 fields with 24 joins; custom fields appear automatically.
- Filters with operators per type, dates, AND/OR groups and searchable columns; sort a run report; reorder columns; group totals.
- Compare a period with the one before it.
- Scheduled reports with recipients, editable schedules, delivered through the automation ledger.
- Excel export of any report, list or search; the Map button on any report.
- Chosen columns on every list and on advanced search.
- Targets by kind (revenue, gross profit and more) measured against real orders, pro-rated by days elapsed, and stated as such on the screen.

12 Search and import

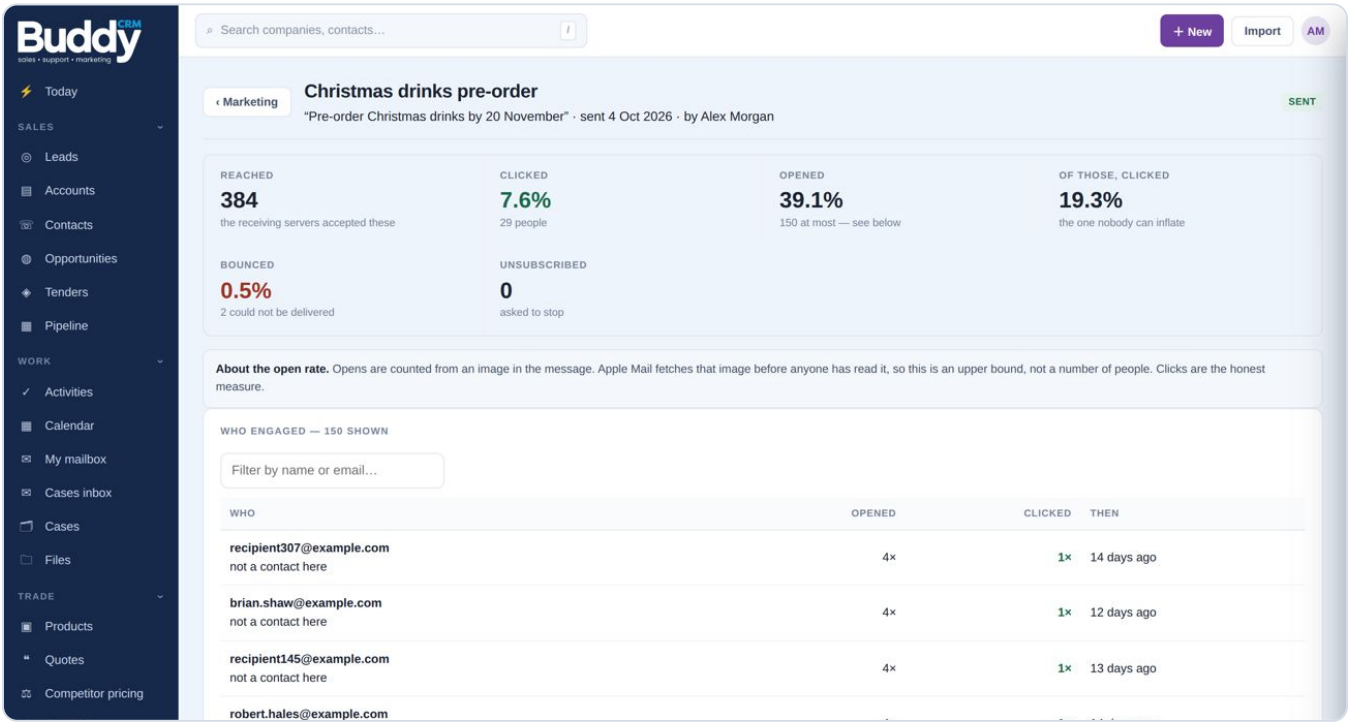
Find anything, then get back to exactly where you were.



- Global search across companies and contacts, matching names, phone numbers and account codes.
- Advanced cross-area search on any field, including custom fields, with AND/OR.
- Back from a record to the search or filtered list it was opened from.
- CSV import for accounts, contacts, leads, the catalogue, price lists, opportunities and activities. A preview is a real run that writes nothing, and every rejected row says why.
- Import actions: what to do with rows that match existing records.

13 Marketing

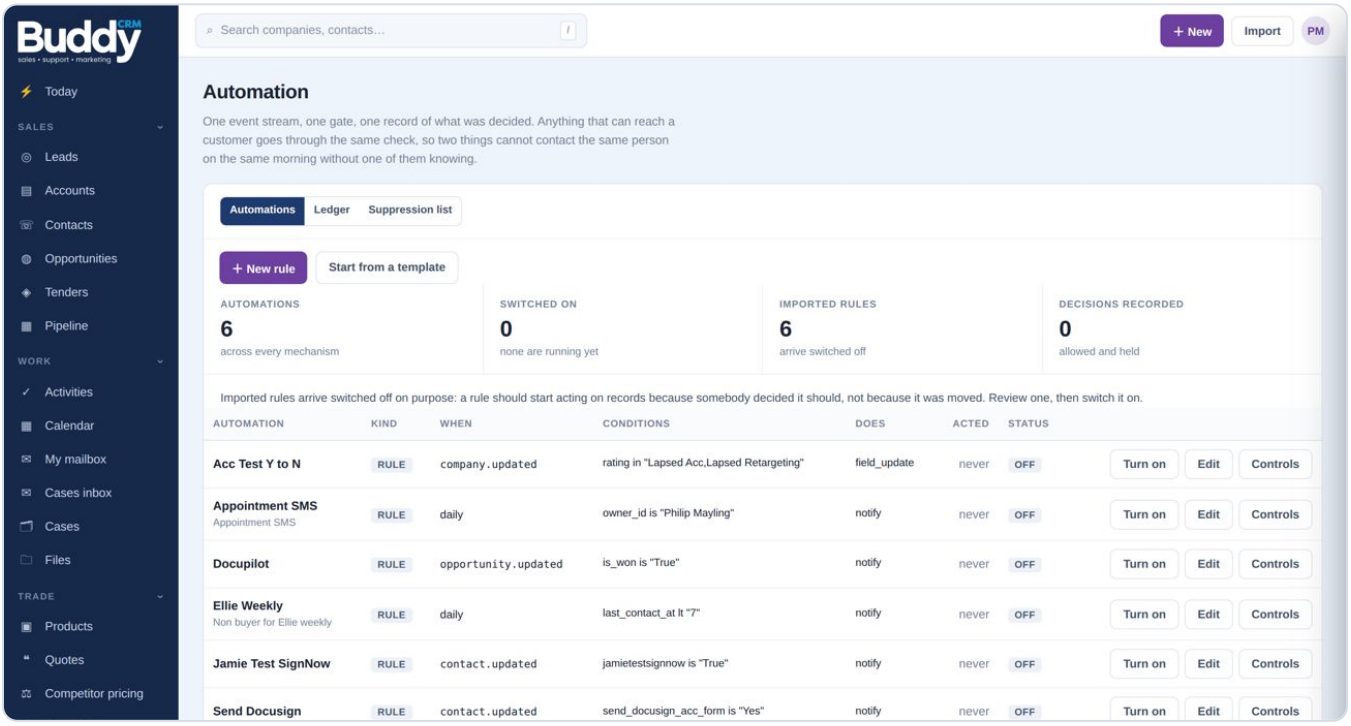
Consent first, sending second. Suppression, consent provenance and sending domains are in the data model, not bolted on.



- Overview, campaigns, emails, audiences, journeys, forms and deliverability as one area.
- Campaigns that send and report honestly: recipients, delivered, held (with the reason), opened, clicked, unsubscribed.
- An email builder that survives Outlook: block-based, tables not divs, inline styles, plain-text alternative generated from the same blocks, links tracked.
- Template library with the merge syntax reps already use.
- Audiences from the same registry as reports, with AND/OR conditions.
- Journeys: entry rules, steps, and a leave check before every step so a sequence stops the moment someone replies.
- Web forms that create leads and lead-companies, and trigger the automation spine.
- WhatsApp marketing: write the message templates Meta must approve, submit them from Marketing, watch their status, and send to contacts who have ticked a separate WhatsApp opt-in, because agreeing to email is not consent for WhatsApp.
- Deliverability: SPF, DKIM and DMARC checked in DNS for real; complaint and bounce rates against the thresholds receivers judge on; the suppression list.
- Each tenant sends marketing on its own sealed key; a product-managed sender handles cases and transactional mail.
- Dry-run mode and an allowlist, so nothing leaves an environment that holds restored data.

14 Automation and agents

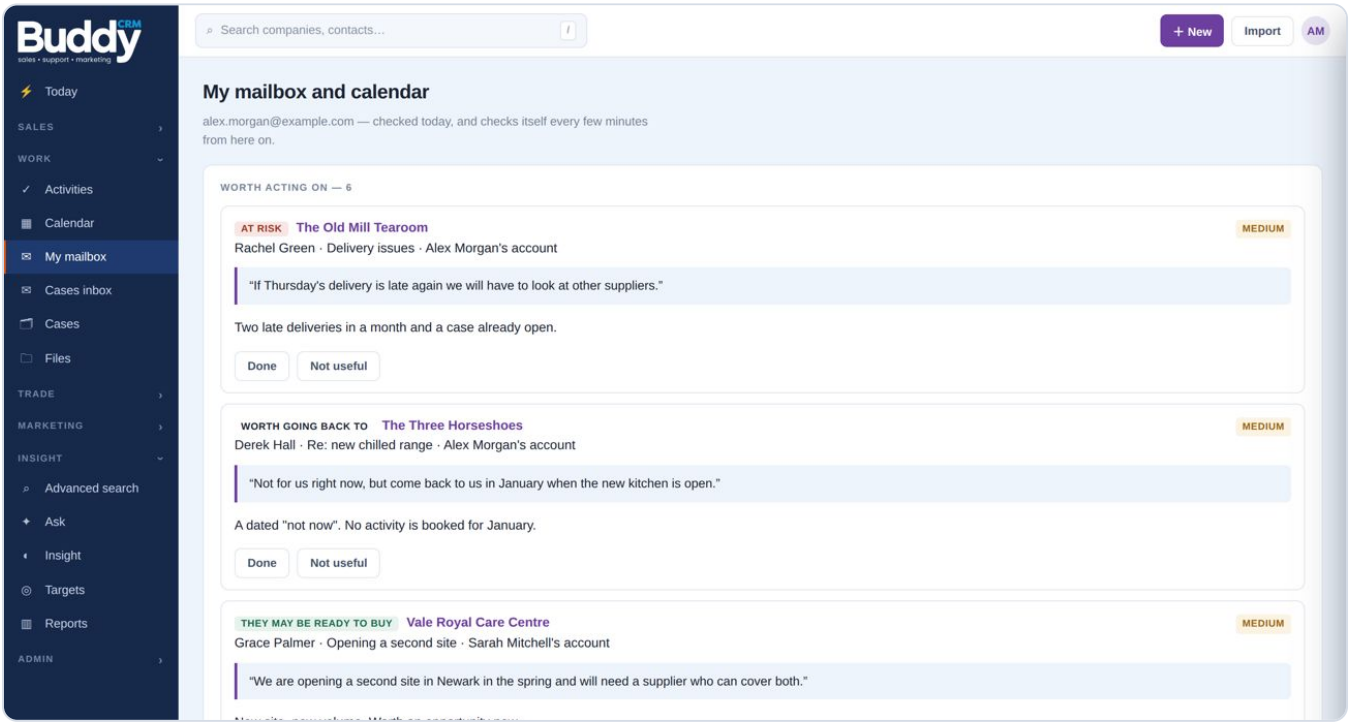
One automation spine instead of six mechanisms: one event stream, one gate, one ledger with reasons.



- Workflow rules that listen to events the application actually emits, with AND/OR conditions on any field including custom fields.
- Actions: create a task for the record's owner, update a field, notify named people, call a webhook. Templates for seven record kinds say what gets made, written down once.
- Expressions with date arithmetic and filters, so a rule can read the record it fired on and do sums with it.
- Outbound webhooks, signed and retried. The ledger records every decision, including every Hold and why.
- Agents: win-back, cadence, quote chaser and stall, plus custom agents you build and assign. Detect in SQL for nothing; draft the top few; a person approves each one until autonomy is earned.
- Drafts are yours to send, and they send as you. Each agent can have its own mailbox.
- AI usage ledger: cost per subscription and monthly token limits.

15 Mailbox and calendar sync

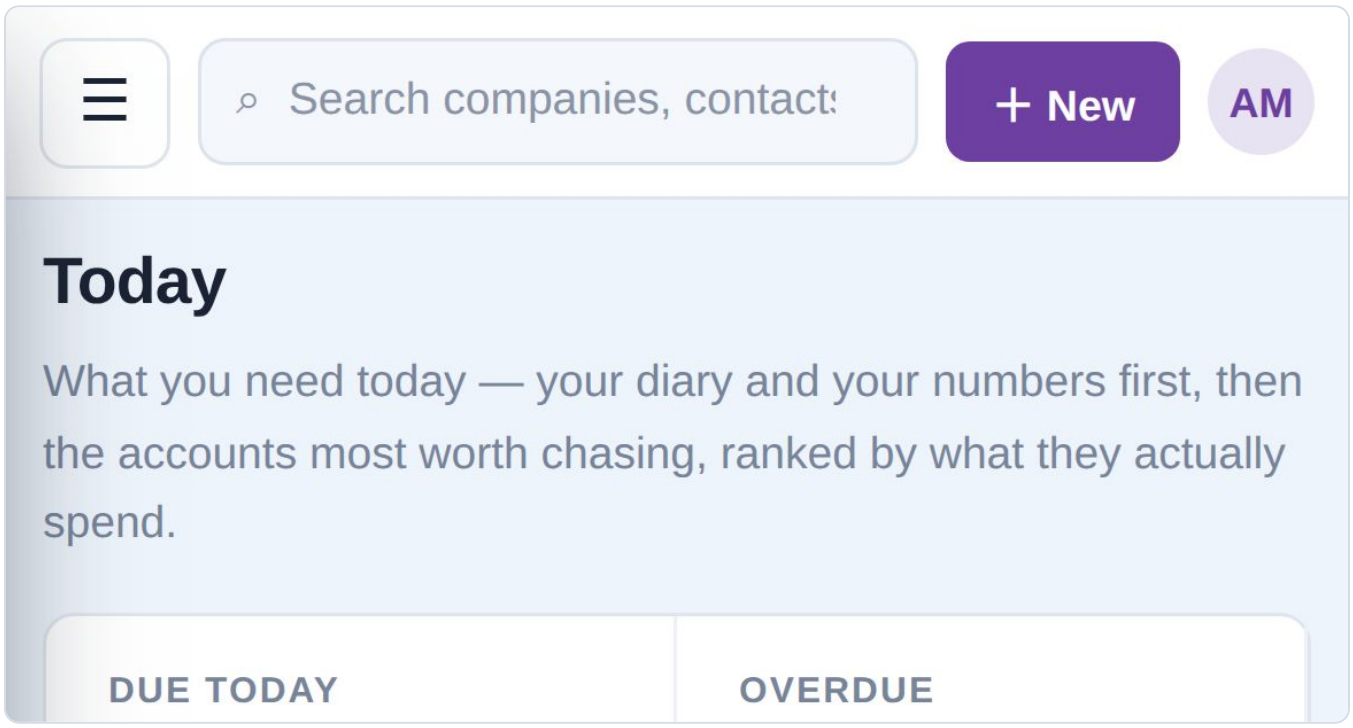
Per user, never a shared service account. Tokens encrypted at rest. Mail and calendar asked for separately.



- Microsoft 365 and Google Workspace, OAuth with PKCE.
- Privacy by design: only mail involving a known contact is logged; domain matching and message bodies are switches each person turns on. The business decides who decides.
- The mailbox screen checks itself and leads with what needs you; a dead connection is surfaced, not hidden.
- Mail signals: evidence detected in email, verified against the source before it is shown.
- Legacy mail archives imported and shared across the account, with attachments.

16 Mobile

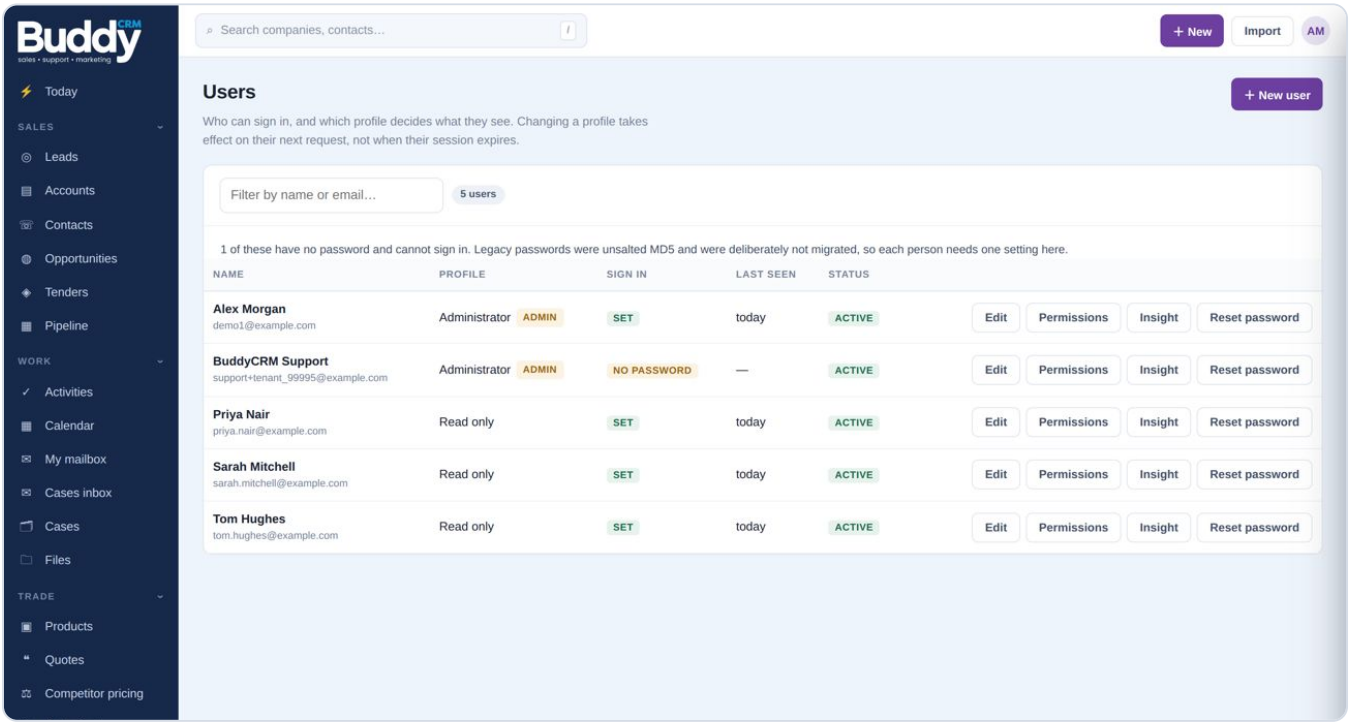
The whole product on a phone, not a cut-down app.



- Full phone layout for every screen: Today, records, calendar, pipeline, cases, quotes.
- Off-canvas rail, search and the New button at the top.
- No install; it is the same URL.

17 Administration and security

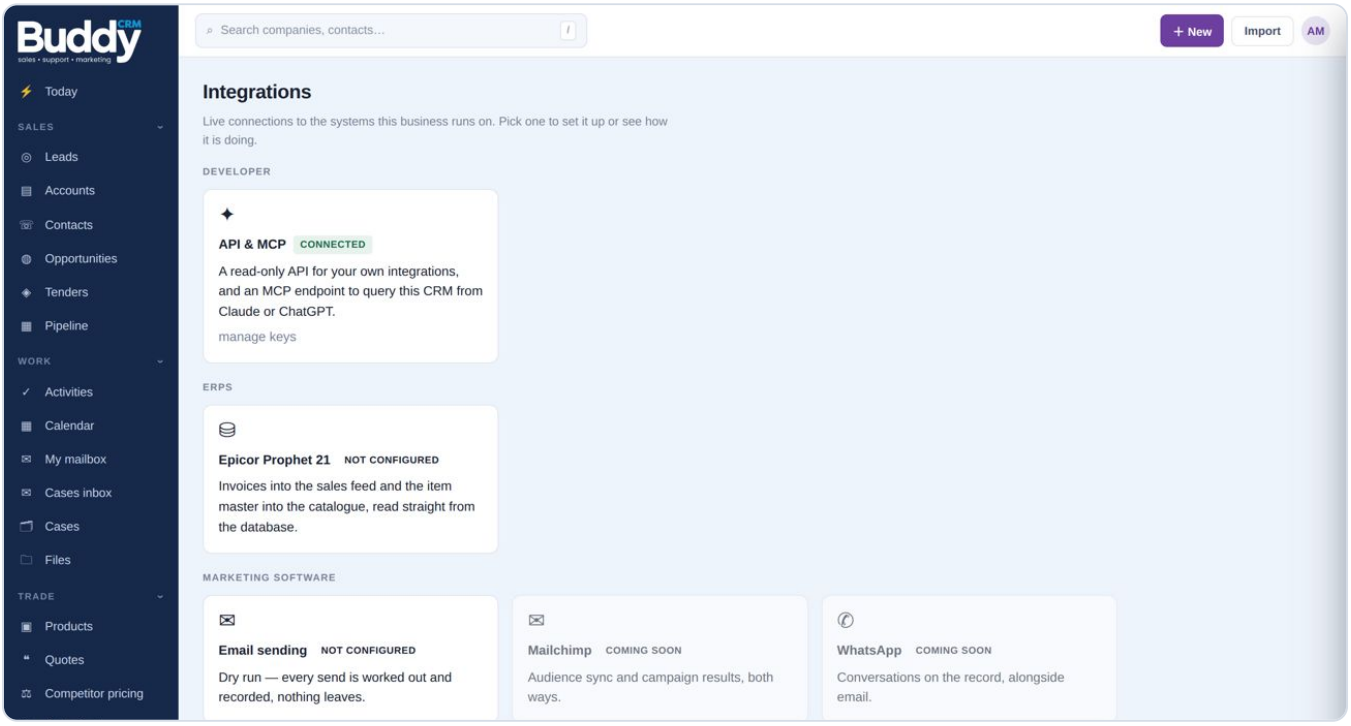
Everything is denied unless granted, and the rows a user may not see never leave the database.



- Profiles with per-area levels, per-user overrides, and record scope: own, team or all. Teams with membership.
- Server-side enforcement on every route; the UI never stands in for a permission check.
- Two-factor authentication (TOTP), enforceable per subscription. Sign in with Microsoft or Google, where the provider is the second factor.
- Password policy, rotation, lockout and session length, configurable per tenant. Self-service password reset.
- Audit log over everything, showing what changed, with Excel export. Impossible-travel sign-in signal.
- Row-level security forced on every tenant table; the application connects as a non-superuser role; secrets sealed per environment.
- System settings, custom fields, record tab layout, quote document, probability templates, templates, webhooks, external feeds, users, teams, integrations.
- Ops console for BuddyCRM staff: tenants, client logos, SSO and 2FA switches, demo tenants filled with data from a sentence, AI usage.

18 Integrations and the API

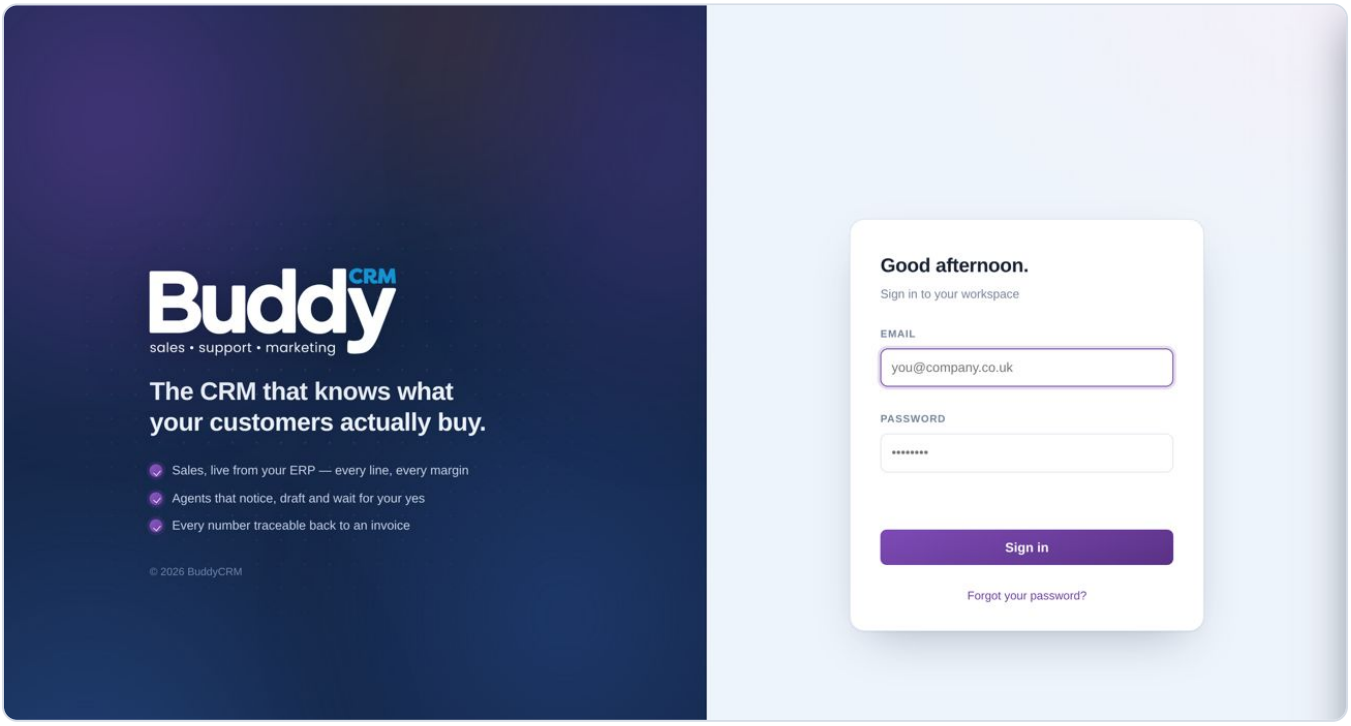
A shelf of tiles. Pick one and the screen explains how to set it up.



- Epicor Prophet 21: sales and products pulled on a schedule; customer price libraries, books and pages read; quotes pushed into the customer's price book.
- Xero: sales invoices pulled every half hour as lines, with item code, quantity, unit price and net amount, straight into the sales feed, so trading, margins and alerts work exactly as they do from an ERP. OAuth 2 with PKCE, tokens sealed at rest, and a sync mark that cannot stop quietly.
- QuickBooks Online: invoices and sales receipts, the same way as Xero, with a sandbox company to prove the connection before a customer's books are touched.
- WhatsApp Business: connect the number you already have through Meta's Cloud API, direct. Inbound messages become cases, replies go out from the case, free text inside Meta's 24-hour window and an approved template after it, and a dry-run mode proves the flow before the number is live.
- Companies House: the public register searched by name or number from any account, the company number linked, and status, officers' filings and warnings read live each time, never from a cache.
- SendGrid for sending, delivery events and inbound case mail. Deliverability checks for both providers.
- Microsoft 365 and Google Workspace for mailbox, calendar and sign-in.
- External feeds with a push URL, an sFTP drop or an upload for any other system, shown on accounts and products.
- Mailchimp: audience synced each night with your fields as merge tags, and an opted-out contact pushed as unsubscribed.
- Outbound webhooks on any event.
- External API (/api/v1) with API keys, tenant-isolated by the same row-level security, documented in the screen.
- A hosted MCP endpoint so Claude and other AI assistants can ask questions of your CRM and search records, read-only, on your key.
- A dedicated egress IP per environment for anything that firewalls by address.

19 Under the hood

Rebuilt, not ported. Roughly three quarters of the old feature surface was deliberately left behind.



- PostgreSQL 16 with forced row-level security per tenant; JSON custom fields with generated views; full-text and trigram search instead of a separate search server.
- FastAPI and SQLAlchemy; hand-written SQL where speed matters.
- A front end with no build step and no framework: ES modules served as they are.
- One worker instead of forty Windows services, with one place errors are recorded.
- PDFs by WeasyPrint; the Docker image proves it can render one before it ships.
- 33 check suites, 909 assertions, run against a real database built from nothing in CI; main deploys to UAT, tags deploy to production.
- Tuned on real customer data, not samples: the ranking, pricing and matching were built against live databases running to hundreds of thousands of quote lines and customer prices.
- Hosted in the UK (London region) on Fly.io with managed Postgres and an S3-compatible file bucket.

Not in this list, by design

Tender analysis beyond what is described above, and migration tooling for further tenants, are planned and not yet built. Everything listed above is in the product and covered by its check suites.

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