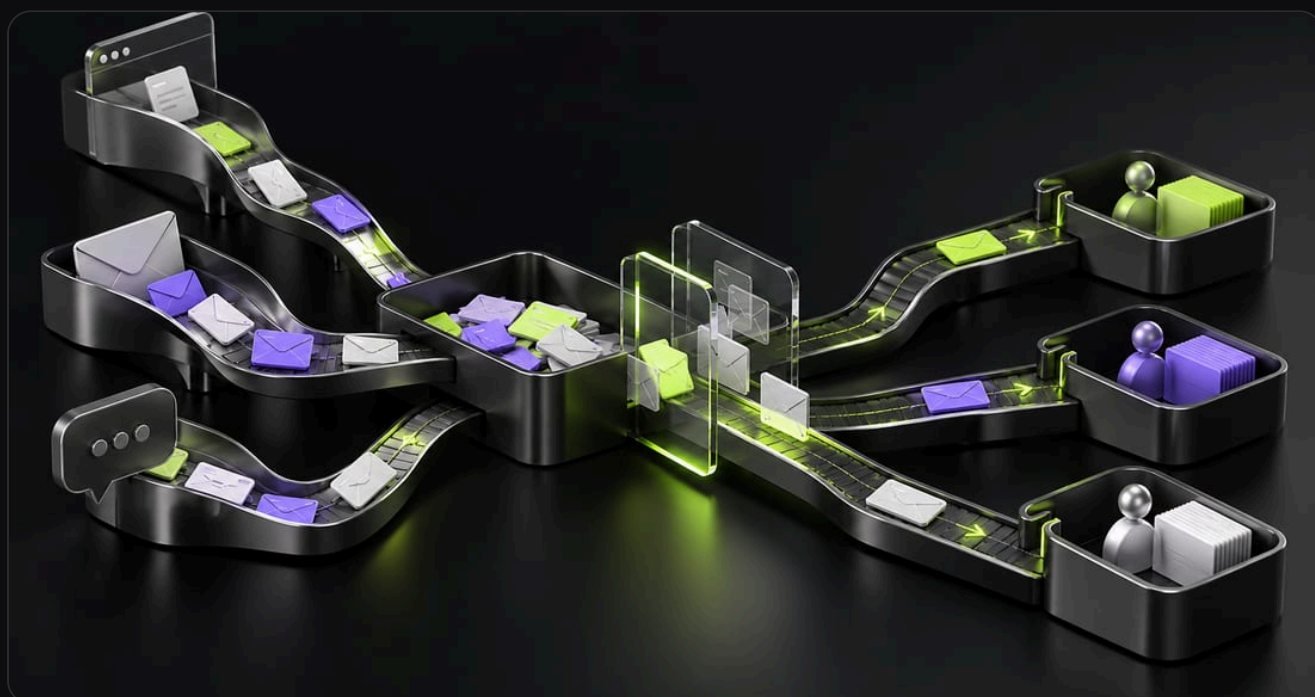


Sales intake routing.

A connected intake workflow that organizes enquiries and routes them to the right sales owner.



Generated project artwork · Not an original application screenshot

Intake automation

CRM integration

Routing rules

Client name not published · Portfolio summary edition

What the project focuses on.

Give incoming enquiries a clear next owner without losing their original context.

FEATURE 01

Multi-channel intake

Bring enquiries from different channels together.

FEATURE 02

Duplicate checks

Identify enquiries that may refer to the same request.

FEATURE 03

Suggested enquiry summaries

Make the original need easier to scan and review.

FEATURE 04

Assigned-owner notifications

Give the assigned owner a clear next handoff.

Workflow at a glance

STEP 01

Collect the enquiry

STEP 02

Check duplicates

STEP 03

Summarize the request

STEP 04

Assign the next owner

This overview communicates the project's intended business flow; it is not a technical specification or original system diagram.

The business objectives.

The project's focus translated into practical goals for the people using it.

OBJECTIVE 01

Sales staff could receive a consistent enquiry record.

OBJECTIVE 02

Potential duplicates could be reviewed before CRM creation.

OBJECTIVE 03

Routing exceptions could stay visible rather than disappearing in an inbox.

Design considerations

- Keep suggestions separate from approved actions.
- Retain source context for reviewer inspection.
- Evaluate uncertain outputs and escalation paths before operational use.

About this brief

Prepared from the current portfolio summary. Client identities, original screenshots, delivery dates, and measured results were not supplied. The artwork is AI-generated; business benefits describe objectives, not verified outcomes.

[View the project on Velgra's website](#)