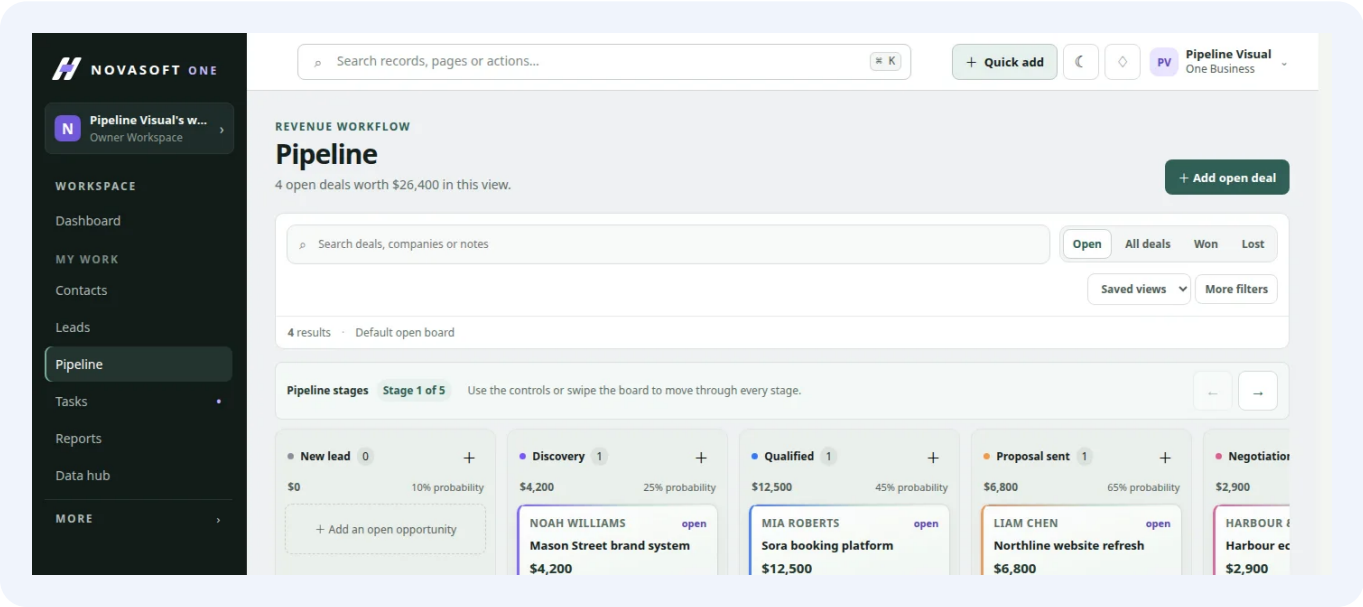
CRM & BUSINESS SYSTEMS

Connected customers. Clearer business.

A customer relationship keeps moving after a sale. This edition brings together the NovaSoft One, UPly and CallLeak stories to explore a more connected way to manage enquiries, delivery and follow-up.



NovaSoft One sales pipeline. Fictional demonstration records.

THE EDITORIAL

The useful question is not simply where a deal sits. It is what the customer needs next, who owns that step and what information the next person will need. A pipeline, a project and a service request all belong to the same relationship.

The existing NovaSoft stories describe software built around that thread. Start with the work people already do, agree how records should connect and introduce new capability in manageable stages. A coherent customer journey gives configuration, reporting and automation a clear purpose.

FROM THE ARCHIVE, INTO PRACTICE

A useful starting point.

Choose the level of CRM around the work and the team using it. These products have different roles; a transition between them should be planned around the data, permissions and workflow involved.

NovaSoft One

The flagship web CRM connects customer records with sales, projects and service. Start with a consistent customer view, then define the handovers and reporting questions your team needs to answer.

UPly

The iOS micro-CRM brings client details, notes, follow-ups and invoices closer to freelancers and independent operators. It is a focused starting point; a move to a wider CRM is a scoped transition.

CallLeak

Missed-call visibility and AI-assisted recovery sit inside NovaSoft One or a tailor-made CRM. Define record matching, contact windows, retry limits and the route to a person before enabling a recovery workflow.

MAKE IT USEFUL

01 Map one enquiry through to delivery and continued service.

02 Name the owner of each customer handover.

03 Agree the minimum useful customer record.

04 Test duplicate records and ambiguous call matches.

05 Choose reporting questions before building dashboards.

Product context: NovaSoft One is the flagship CRM. UPly is an iOS product. CallLeak is an integrated CRM capability.

CONTINUE READING

The connected CRM story

The UPly product story

CallLeak in the customer workflow

2024 / THE FOUNDATIONS

Start with the work. Build something useful.

A MESSAGE FROM MARCUS COULTER, FOUNDER & CEO

Retrospective reflection | Product examples reflect October 2026

> The ambition is simple: software that makes the next step clearer.

Looking back at NovaSoft's beginnings in 2024, the question I want to keep at the centre is a practical one: what would make someone's work easier to understand and carry out? A strong software idea starts with that person, their information and the decisions they need to make.

The connected-customer theme in this edition is a way to revisit that foundation. Our current CRM products give that direction a concrete form. As founder, I want our product choices to stay close to a useful outcome, with clear language, considered engineering and room to grow. Thank you for taking an interest in the company we are building.

Marcus Coulter

Founder & CEO, NovaSoft Technologies

OUR FOCUS

01 Begin with a real workflow.

02 Keep the customer relationship in view.

03 Make the first useful step understandable.