



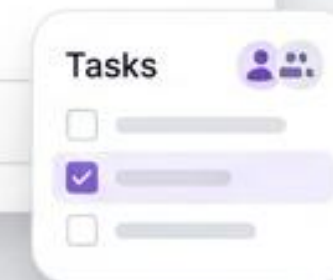
CRM PRO

A complete sales automation system



CRMPro Automation Engine

Reference Guide & Operational Architecture



The Sales Engine: Acquisition vs. Pipeline

Separating early-stage noise from qualified revenue opportunities.

Leads Module (Acquisition)



Purpose:

- Capture, score, and nurture.



Data:

- Syncs first name, email, referral share type.
- Priority levels (Low, Medium, High).



Automation:

- Captures from Meta Lead Ads, Google, WA triggers.



Rule: Sales Reps can delete leads to keep pipelines clean.

Incoming Lead

Incoming Lead

☐ Contact	Email	Source	Priority
☐ Sanry Smith	contactis@gmail.com	Google	Low
☐ Sanry Smith	maamelth@gmail.com	Google	Medium
☐ Kavin Sutkon	kavimuin@gmail.com	Source	High
☐ Mera Tiavia	norvnan@gmail.com	Google	High

Deals Module (Pipeline)



Purpose:

- Drive qualified opportunities to closure.



Data:

- Stage, Close Date, Probability (0-100%).



Revenue:

- Calculated forecasting based on value × probability.
- Tracks referral payout ledgers.



Rule: Managers oversee global pipeline and approve final payouts.

Kanban Board

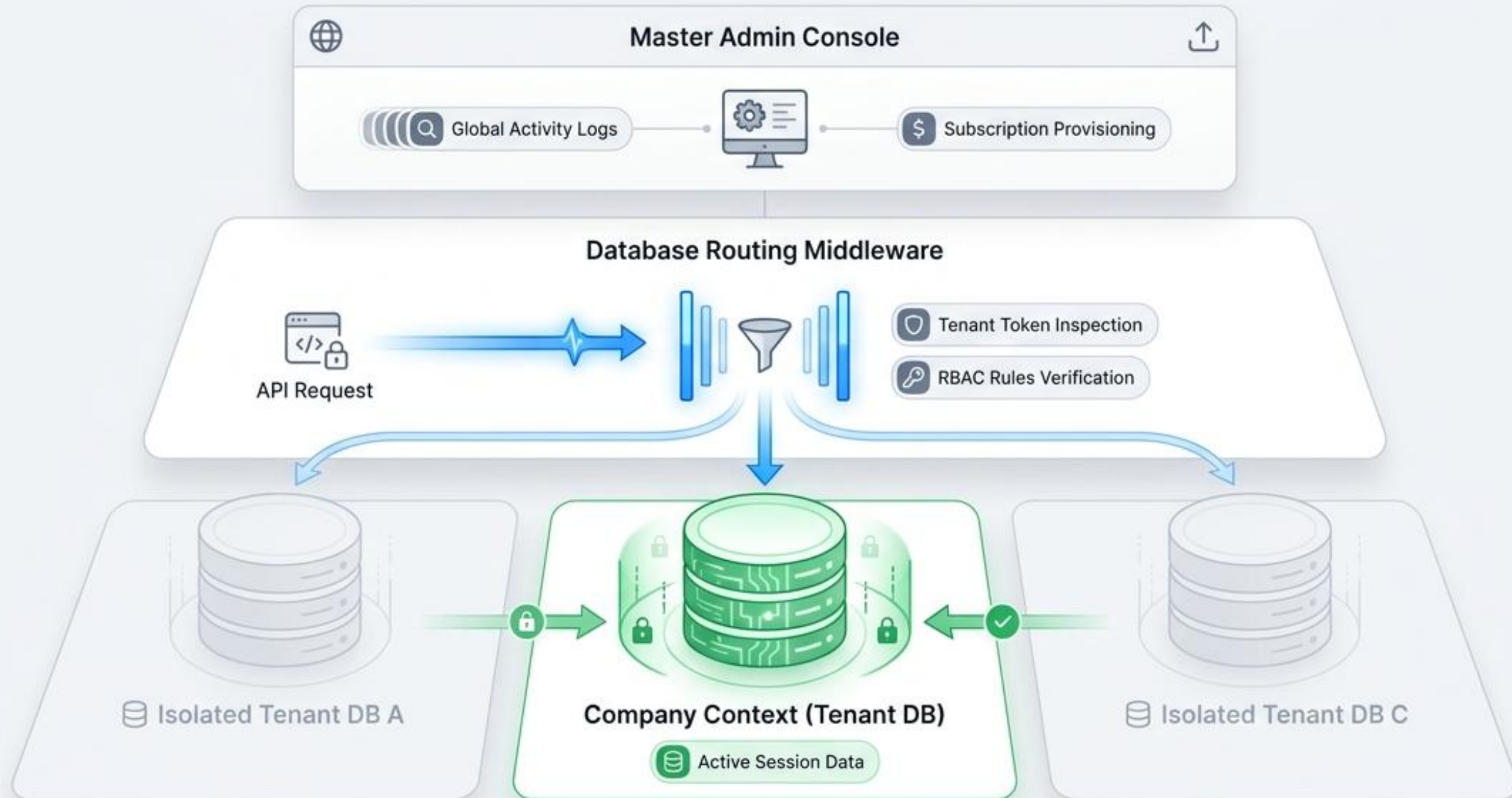
% Drag board

Scout Board

Qualified	Proposal Sent	Negotiation	Closed Won	Closed Lost
Deal Name 1 \$1,000 Progress	Deal Name \$3,000 Progress	Proposal Sent 1 \$1,000 Progress	Closed Won \$1,900 Progress	Closed Lost \$1,200 Progress
Deal Name 2 \$1,000 Progress	Deal Name \$2,000 Progress	Proposal Sent Fo... \$1,000 Progress		
Deal Name 3				

Premium Multi-Tenant Architecture

Data context switches dynamically per user token. Strict route-level security guarantees absolute data isolation.



Core Directories: The Human Element vs. The Inventory

The foundational databases that feed the commercial lifecycle.

Customers & Partners

Focus: The permanent unified directory.

Fields: GSTIN, Billing/Shipping Text, Segments (Customer vs. Partner).



Security Note: 🎯 Reps cannot delete profiles or bulk export to CSV, protecting corporate client lists from theft.

Address Book

Search

Address

Search

Contacts

Segments

Contact Cards

Filter



Sunny Smith
contootle@gmail.com

Contact card



Sunny Smith
msomatin@gmail.com

Contact card



Kevin Stetien
nomnatin@gmail.com

Contact card

Products & Catalog

Focus: Central inventory register.

Fields: SKU, HSN Tax Codes, Cost/Selling Price, Stock Quantity.

Defaults: Tax Rate (18.00%), Unit (pcs).



Action: Reps use this catalog to construct accurate deals without altering core HSN codes.

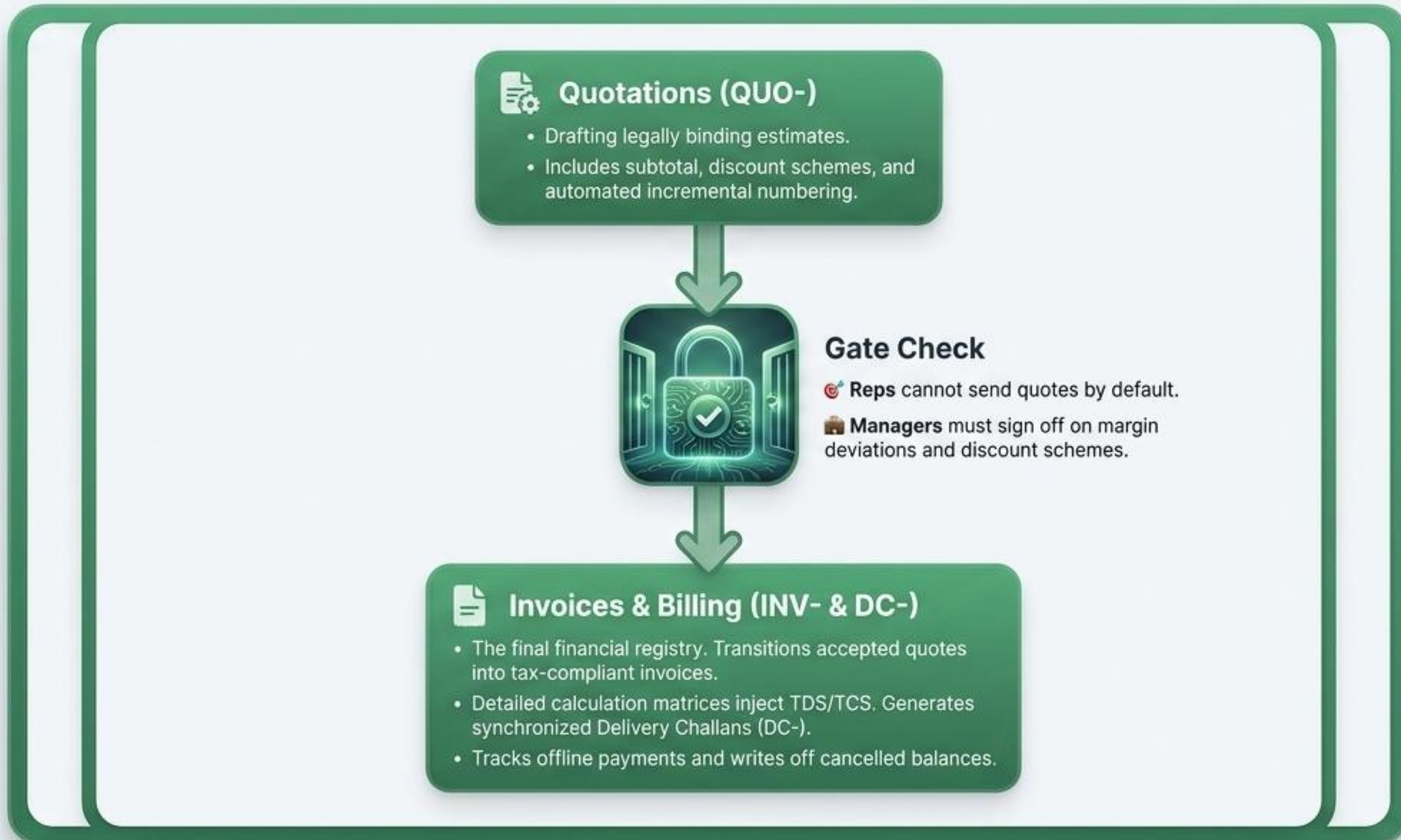
Product Database

Product Database

☐ SKU	Product Name	Price	Stock levels
☐ S00001	Product Name 1	\$10.00	1,600
☐ S00002	Product Name 2	\$10.00	2,000
☐ S00003	Product Name 2	\$10.00	1,600
☐ S00004	Product Name 1 + 1h1e	\$10.00	500
☐ S00005	Product Sexouni et Kirls	\$10.00	200

The Financial Engine: Strict Administrative Billing

Automated progression from proposal to final taxation.



The Collaboration Hub: Execution & Communication

Fusing internal coordination with external customer support.

Tasks & Action Items

- ✓ Prepare proposal for Acme Corp [Lead: LD-00235](#)
- ✗ Follow up on pending payment [Customer: C-1245](#)
- ✗ Team meeting for Project Alpha [Project: P-00078](#)
- Resolve support ticket #456 [Deal: D-00912](#)
- ✗ ~~Prev: send ticket #456~~ [Deal: D-00912](#)

[Mechanic: Cross-Entity Linking](#)

Tasks are not orphaned; they pin directly to a Lead, Deal, Customer, or Project ID.

[Features:](#)

Multi-user collaboration, push alerts for due dates, Priority tracking (Pending -> Completed).

Pending

1

In Progress

Completed

Chat & WhatsApp Inbox

Sarah Lee (Internal)
@JohnSmith, please review the latest contract draft. - 2:30 PM

John Smith: Senior Rep

David Chen (WhatsApp)
Hi, I have a question about my order status.

Team Alpha (Channel):
Let's sync on the Q3 goals. - 2:30 PM

Message...

[Mechanic: Contextual Channels](#)

Threads bound directly to business objects so agents collaborate exactly where the business occurs.

[Features:](#)

Internal DMs, @mentions, unified external WhatsApp inbox for customer support, Voice/Video Call Registry logging durations.

Internal DMs

@Mentions

WhatsApp

Call Logs

Scaling the System: Outreach & Structural Adaptation

Tools reserved for administrators to scale audiences and databases.

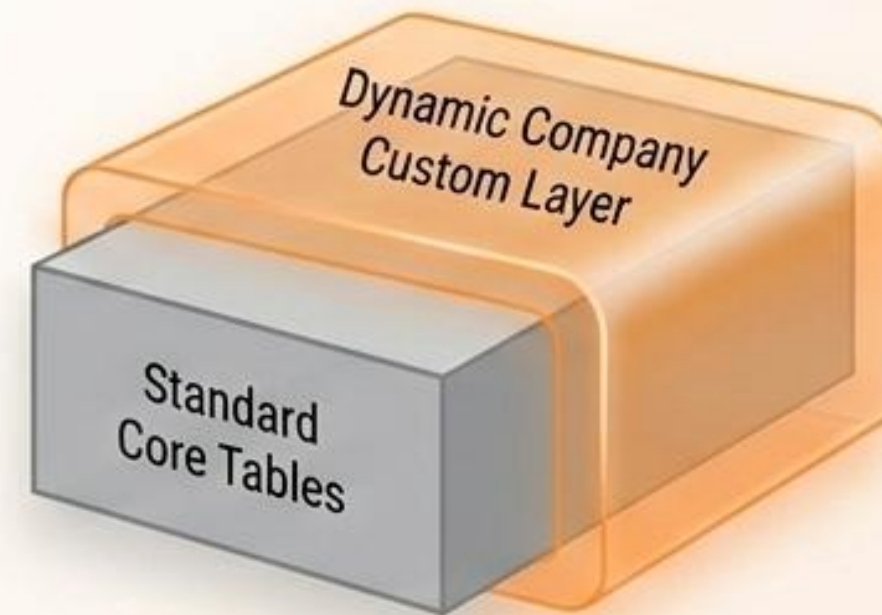
🔒 Marketing Campaigns



- **Action:** Dynamic JSON filters segment audiences (e.g., 'All Meta leads from last month').
- **Tech:** Direct Meta Cloud API integration for WhatsApp WABA templates.
- **Security:** 🎯 Reps locked out to protect corporate email domains from spam classification.

🔒 Custom Fields Builder

The Database Extension Model



- **Action:** Injects text, dropdowns, or dates into front-end forms without custom code.
- **Security:** 🏰 Highly guarded Admin-Only module.

Immutable Security & Data Integrity Rules

The absolute guardrails protecting the platform from data loss.



1. No Self-Deletion

Users are strictly blocked from deleting their own active accounts.



2. Deactivation Over Deletion

Terminated accounts are set to `is_active = 0`. Historical records and audit logs are preserved permanently.



3. System Role Lockdown

Core roles (Admin, Manager, Rep, Viewer) are flagged as `is_system = 1`. The base RBAC framework cannot be edited or destroyed.

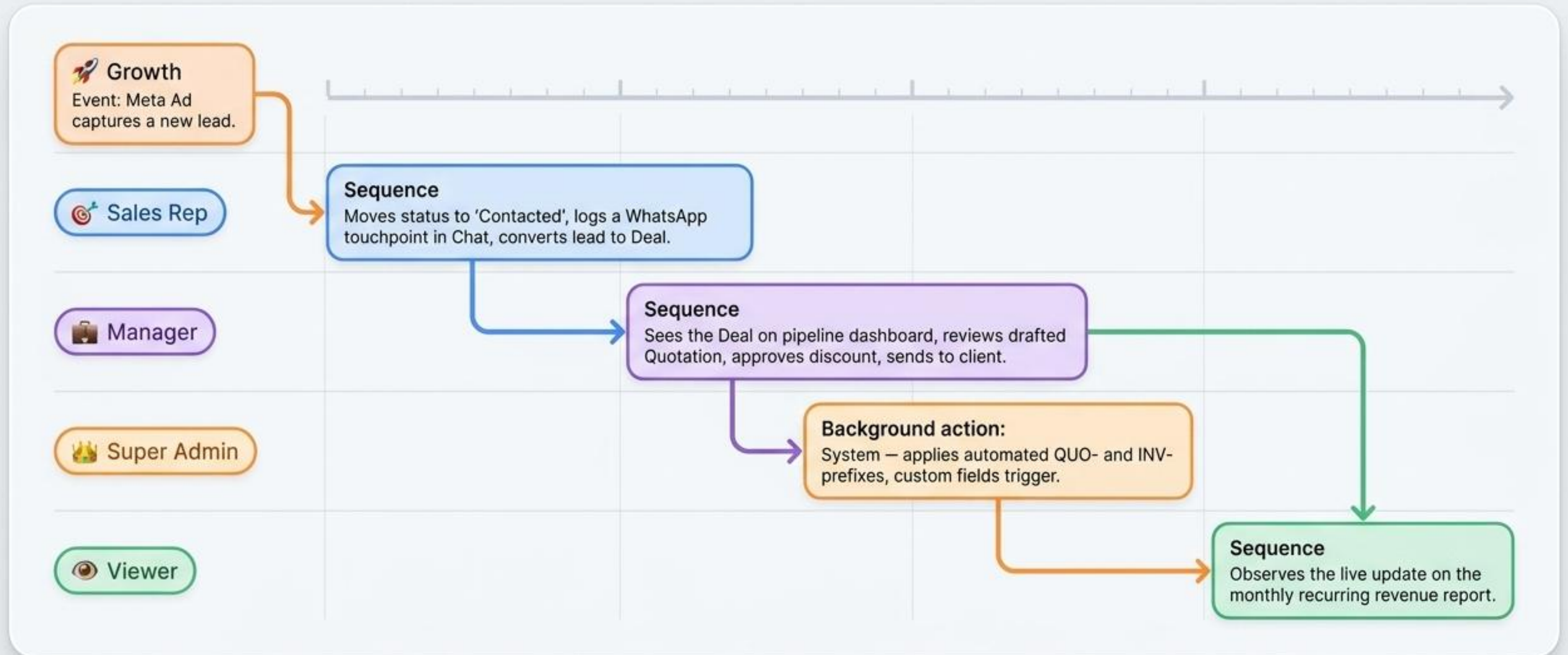


4. Subscription Caps

Endpoint verification dynamically checks active user counts against Master database tenant licenses to prevent over-provisioning.

A Day in the Life: Synchronized Workflows

Simultaneous system actions triggered by a single commercial event



Day One: Quick-Start Action Plan

Transforming this technical architecture into immediate business momentum.

Admin Setup

- ☐ Configure Company Profile (GSTIN, Banks)
- ☐ Define Prefixes (INV-, QUO-)
- ☐ Deploy Custom Fields
- ☐ Connect Meta API

Manager Setup

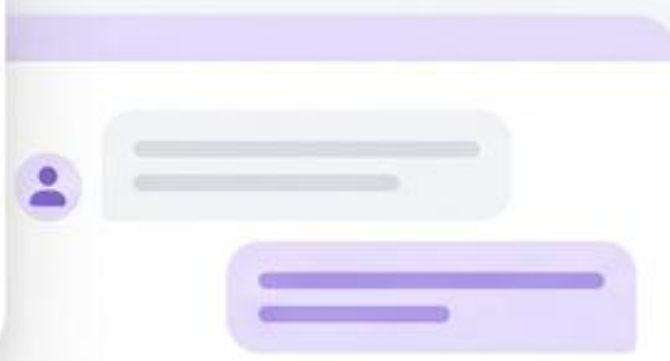
- ☐ Audit initial dashboards
- ☐ Arrange active pipelines
- ☐ Set margin thresholds for quotes

Rep Setup

- ☐ Monitor incoming lead boards
- ☐ Begin WhatsApp outreach
- ☐ Move prospects through stage cards

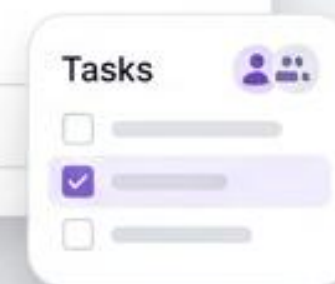
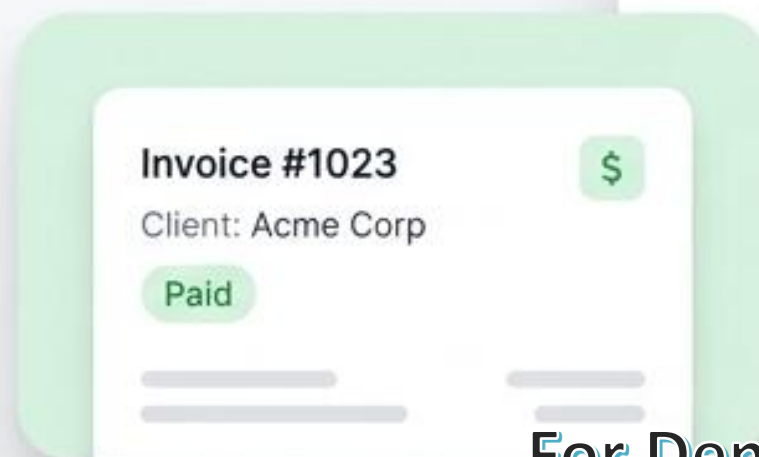
Viewer Setup

- ☐ Log in
- ☐ Apply global filters to active deals
- ☐ Observe operations safely without alteration risks



CRMPro Automation Engine

Powered By : Shivansh Infotech



For Demo

✉ sales@shivanshinfotech.co.in | ➡ 📞 +91 9131931722

🌐 www.shivanshinfotech.co.in