

Aura Visual Studio

dayshafreeman@auravisualstudio.com
www.auravisualstudio.com

CRM_Ecosystem_Handshake // v.03

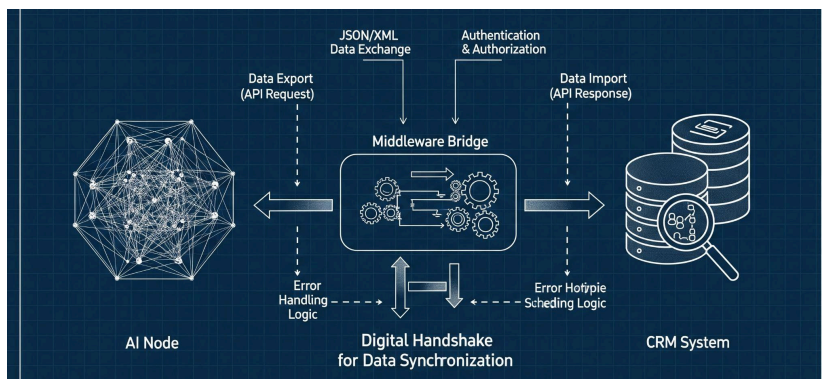
Technical Blueprint: CRM & AI Node Synchronization

1. The Objective: Universal Data Continuity

The goal of an "Ecosystem Handshake" is to ensure that data captured by an AI agent is instantly actionable within a CRM (Salesforce, HubSpot, etc.). Information should never sit in a "chat log"; it must be parsed into specific data fields.

2. The Middleware Bridge (The Handshake)

To avoid being locked into one platform, use a middleware layer (Make.com, n8n, or custom



Python scripts) to act as the translator between the AI's JSON output and the CRM's API requirements.

sends a POST request to your middleware URL.

- **Step 2: The Data Parser:** The middleware breaks the conversation into individual strings (Name, Budget, Pain Point).

- **Step 1: The Webhook Trigger:** The AI node identifies a "Qualification Event" and

2

- **Step 3: The Upsert Command:** The system checks if the lead exists (Update) or creates a new one (Insert).

3. Core Data Schema (The "JSON" Standard)

When the AI agent finishes a session, it should export data in a standardized format. This allows you to swap CRMs in the future without rebuilding the AI logic.

Standardized Output Template:

4. Data Capture & Handshake

Once the node completes the qualification, the data must be formatted for your CRM. Do not store this as "chat history"; store it as a **Lead Object**.

The JSON Blueprint:

```
JSON
{
  "client_metadata": {
    "source_node": "lead_gen_v1",
    "timestamp": "2026-04-14T21:00Z"
  },
  "parsed_data": {
    "company_name": "string",
    "current_stack": ["WordPress", "Stripe"],
```

```
"automation_urgency": "High",  
"projected_budget": "number"  
},  
"sentiment_score": "0.85"  
}
```

4. Integration Logic: Automated Workflows

Once the handshake is complete, the CRM should trigger secondary actions based on the "Automation_Urgency" or "Budget" tags.

- **Condition A (High Budget + High Urgency):** Auto-create a "Deal" and move to the **Discovery Call** stage. Ping the sales team phone.
- **Condition B (Low Budget + Research Phase):** Add to the **Email Nurture Sequence**. Tag as "Resource Consumer."
- **Condition C (Technical Support):** Route the data to **Zendesk/Support Ticket** system. Bypass the sales pipeline entirely.

5. Security & Data Integrity Fail-safes

The Sanitization Filter: Middleware must strip HTML/Script tags from user input before sending to the CRM to prevent injection attacks.

The Retry Loop: If the CRM API is down (500 error), the middleware must store the data in a "Pending Queue" and retry every 10 minutes until successful.

The Deduplication Rule: Always search for an existing Email Address before creating a new record to keep the CRM database clean and profitable.

6. Implementation Checklist

1. Verify CRM API access and generate a Private App Token.
2. Set up the Webhook receiver in the middleware.
3. Map AI variables to CRM Custom Fields.
4. Execute a "Terminal-to-CRM" test submission.
5. Deploy the live Handshake Node.