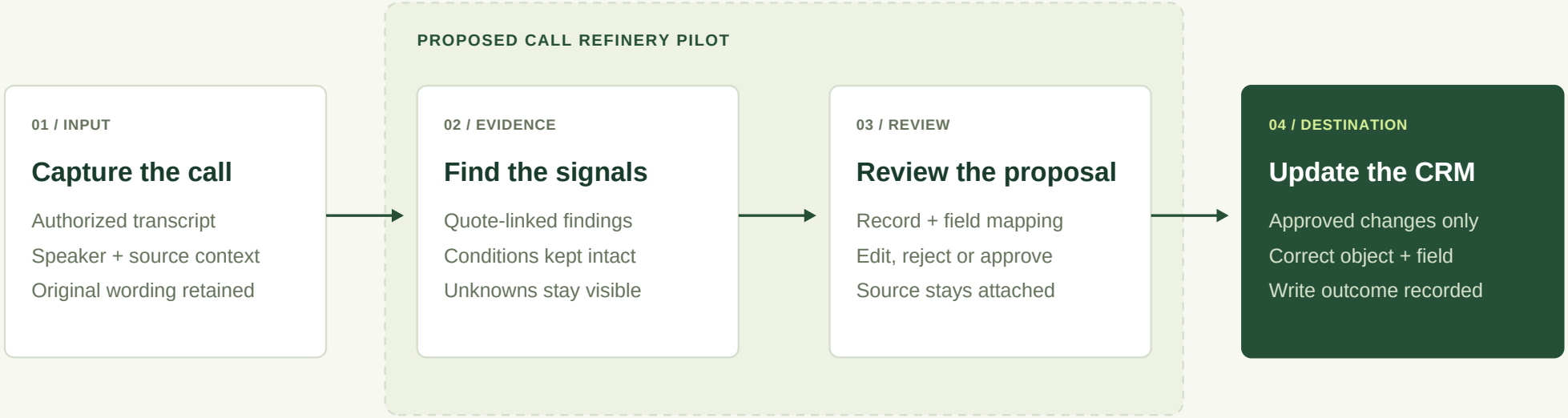
From customer conversation to CRM

A reference architecture for turning call evidence into reviewable updates.



KEEP THE SOURCE

Quote, speaker and call context travel with every proposal.

PRESERVE UNCERTAINTY

A target date is not a commitment. Missing information stays unresolved.

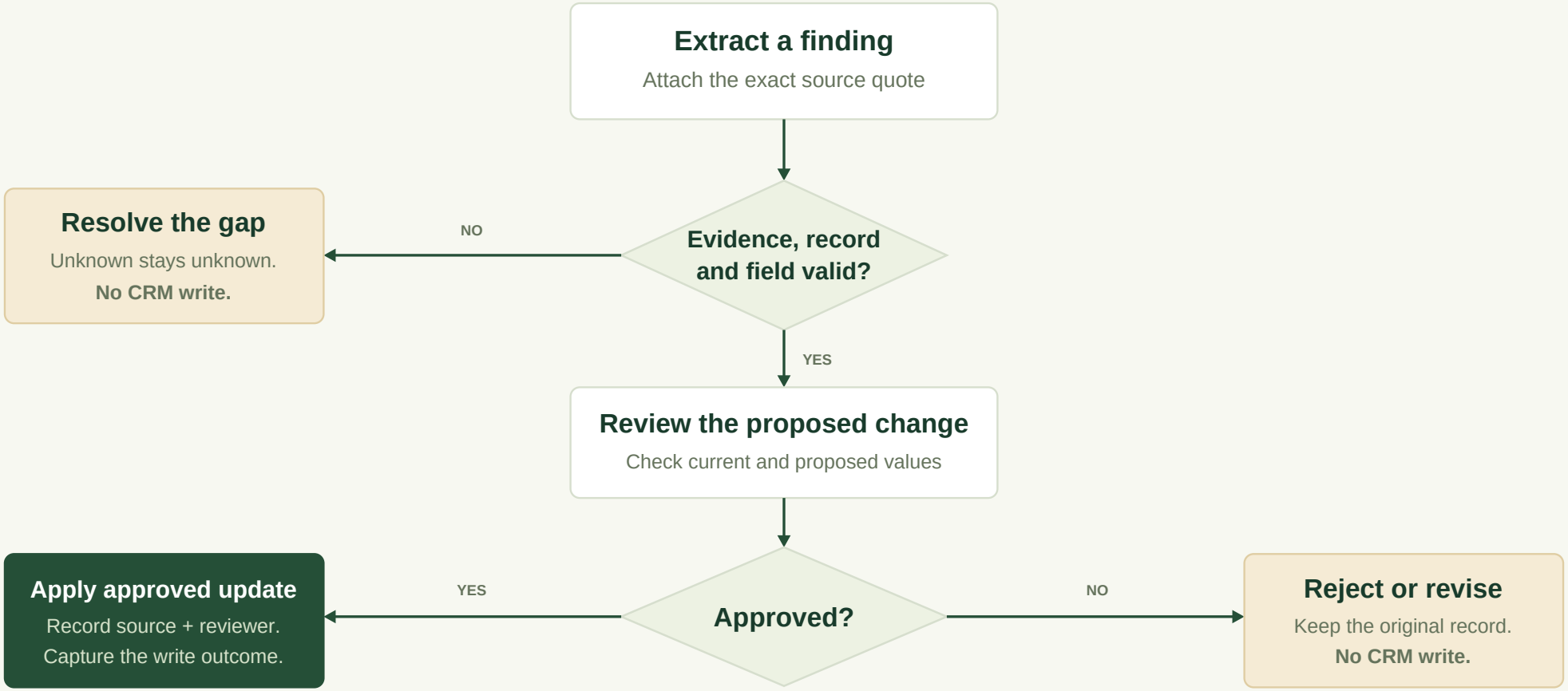
RECORD THE OUTCOME

Retain the reviewer, previous value and result of the approved write.

Reference design. The public preview uses fictional data; Salesforce integration is planned.

When should a finding become an update?

A review flow for evidence, record matching and human approval.



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