

TSEA-ERP CRM  
AUTOMATION ENTERPRISE  
INTEGRATION

# Social Media Channels Integration with ERPNext CRM

Automated Lead Capture & Unified Pipeline Management



WhatsApp



Facebook



Instagram



Website



Google

Ingest

Store

Route

# Integration Overview

## 01 System Architecture

How all channels connect through APIs and webhooks into a unified CRM pipeline.

## 02 WhatsApp Business

Message-to-lead automation with profile data capture and instant CRM entry.

## 03 Facebook & Instagram

Lead form submissions via Meta Webhook with campaign tracking.

## 04 Company Website

Web forms integrated via REST API for instant lead creation.

## 05 Google Business Profile

High-intent customer capture through Google messaging.

## 06 Unified CRM Pipeline

Single view for lead management with automated controls.


## 07 Data Traceability & Controls

End-to-end tracking from lead to payment with comprehensive audit trails.

# How All Channels Connect

Unified integration through APIs and webhooks into a single CRM pipeline

## Source Channels

 WhatsApp

 Facebook

 Instagram

 Website

 Google

## Integration Layer



APIs &  
Webhooks

- Data Validation
- Field Mapping
- Source Tagging
- Auto-Assignment
- Real-Time Sync



REST  
API

## ERPNext CRM

 Lead Created

 Pipeline Management

 Analytics

 Notifications



### Real-Time

Instant lead capture from all channels



### Automated

No manual data entry required



### Unified

Single pipeline for all sources



### Reliable

Zero data loss with validation

# WhatsApp Business → ERPNext CRM

Message-to-lead automation with instant data capture



## Data Mapping: WhatsApp → ERPNext

ERPNext Field	WhatsApp Source
Lead Name	WhatsApp Profile Name
Phone Number	WhatsApp Number
Source	WhatsApp
Lead Status	Open
Message / Notes	Customer Message
Owner	Auto-assigned Sales User

Lead Created in ERPNext

New Lead

Lead Name:

John Smith

Phone:

+1 (555) 123-4567

⚡

Instant Creation

Lead appears in CRM within seconds

☰

# Facebook & Instagram → ERPNext CRM

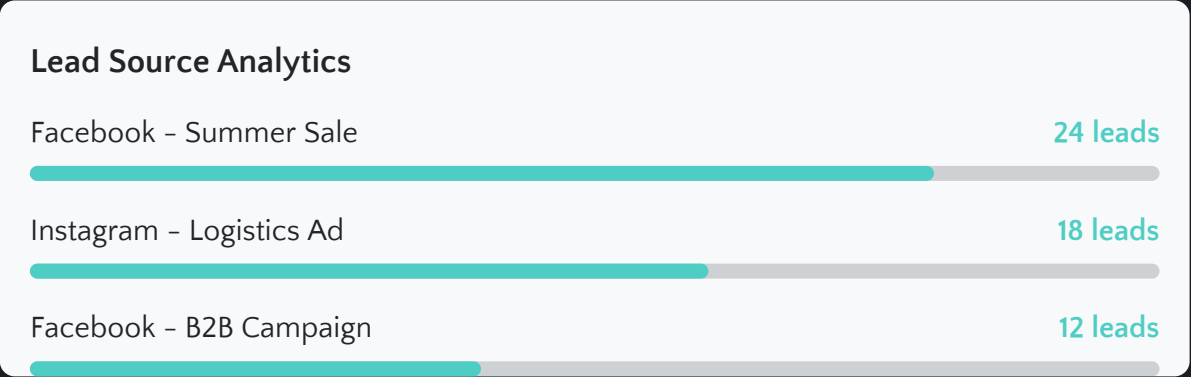
Lead form submissions with campaign tracking



## Data Mapping: Facebook/Instagram → ERPNext

ERPNext Field	Meta Source
Lead Name	Facebook Form
Phone	Facebook Form
Email	Facebook Form
Location	Facebook Form
Source	Facebook / Instagram
Campaign	Ad Campaign Name

## Campaign Performance Tracking



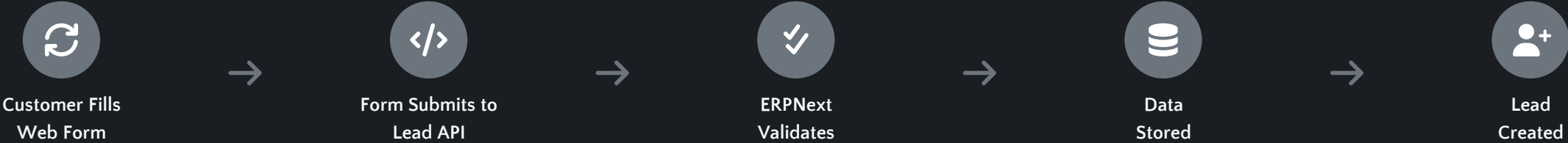
**Real-Time Creation**  
Leads created instantly from form submissions

**Campaign ROI**  
Traceable performance for each ad campaign

**Immediate Follow-up**  
Sales team can contact leads right away

# Company Website → ERPNext CRM

Web forms integrated via REST API for instant lead capture



## Data Mapping: Website → ERPNext

ERPNext Field	Form Source
Lead Name	Form Input
Phone	Form Input
Email	Form Input
Service Type	Form Selection
Pickup Location	Form Input
Source	Website

## Website Form Example

Book a Pickup

Full Name

Sarah Johnson

Phone Number

+1 (555) 987-6543

Service Type

Express Delivery

Submit Request

Instant Lead Creation

Zero delay from form submission to CRM

Zero Data Loss

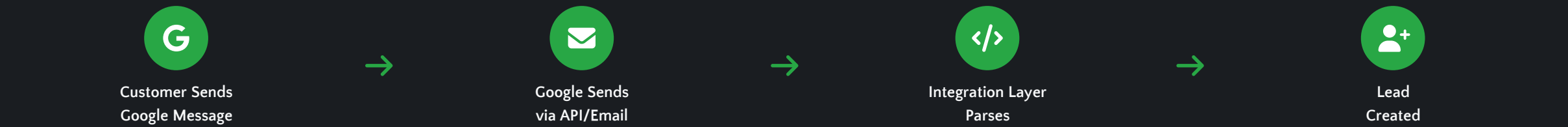
Every form submission captured reliably

Structured Data

Clean, validated data ready for operations

# Google Business Profile → ERPNext CRM

Capture high-intent customers from Google searches



## Data Mapping: Google → ERPNext

ERPNext Field	Google Source
Lead Name	Google Profile
Phone	Google Inquiry
Message	Customer Inquiry
Source	Google Business

### Google Business Message Example

**From:** Mike Thompson  
**Message:** "Do you offer same-day delivery services in downtown? Need urgent shipping."

## Google Business Profile Interface

**Swift Logistics**  
4.8 ★★★★★ (127 reviews)

Questions & Answers

Q: Do you offer international shipping?  
Asked 2 hours ago

Message →

**High-Intent Customers**  
Capture leads actively searching for services

**Centralized Tracking**  
All Google inquiries in one system

**Faster Response**  
Immediate lead routing to sales team

## UNIFIED PIPELINE

# Single View for All Channels

All platforms feed into the same CRM pipeline with automated controls



**New Lead**

All Sources



**Contacted**

Initial Response



**Quoted**

Proposal Sent



**Converted**

Won Deal




**Lost**

Closed Lost


## ERPNext CRM Pipeline View

**New Lead (8)**



 **John Smith**

WhatsApp · 2 min ago

 **Maria Garcia**

Facebook · 5 min ago

 **David Chen**


Website · 8 min ago

**Contacted (5)**



 **Robert Wilson**

Google · Assigned: Sarah

 **Lisa Park**

Instagram · Assigned: Mike

**Quoted (3)**



 **James Brown**

Quote: \$2,450

**Converted (2)**



 **Anna Lee**

Deal: \$3,200 ✓



**Auto-Assignment Rules**

Round-robin or criteria-based lead distribution



**SLA-Based Follow-ups**

Automated reminders and escalation rules



**Lead Source Reporting**

Performance analytics by channel



**Conversion Tracking**

End-to-end funnel analysis

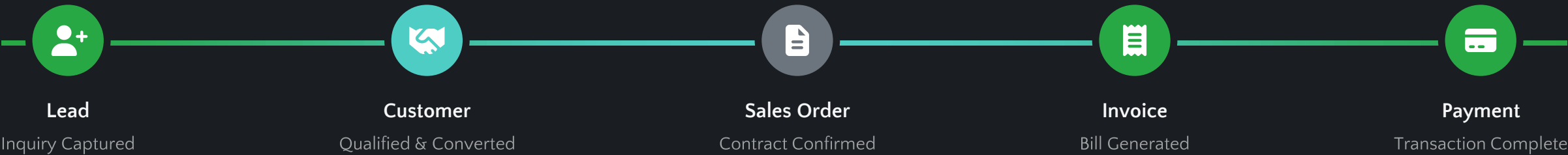


END-TO-END VISIBILITY

# Complete Traceability Inside ERPNext

Track every lead from initial inquiry to final payment

## Lead Journey: Inquiry to Payment



## Data Tracked for Every Lead

**Source Platform**  
WhatsApp, Facebook, Website, Google

**Original Inquiry**  
Complete message history

**Assigned Staff**  
Sales owner and team

**Follow-up History**  
All interactions logged

**Conversion Outcome**  
Won, Lost, or In Progress

## Lead Detail View in ERPNext

**John Smith · Lead #LE-2025-001**

Converted

Source:

WhatsApp

Phone:

+1 (555) 123-4567

Assigned To:

Sarah Miller

Created:

Jan 15, 2025 10:30 AM

Converted:

Jan 18, 2025 2:15 PM

Original Message:

Last Activity: Quote accepted - Sales Order #SO-2025-089 created

# ERPNext Controls & Automation

Smart rules and workflows to streamline lead management

## Auto-Assignment Rules



### Round-Robin Distribution

Leads distributed evenly across sales team



### Territory-Based

Assign by location or region



### Source-Based

Route by channel (WhatsApp, FB, etc.)

## SLA-Based Follow-ups



### Response Time: 2 Hours

Auto-reminder if not contacted



### Follow-up: 24 Hours

Escalate to manager if no progress



### Auto-Close: 7 Days

Mark inactive if no response

## Performance Analytics Dashboard

54

New Leads This Week

↑ +23%

68%

Conversion Rate

↑ +5%

2.1h

Avg Response Time

↓ -35%

\$84K

Pipeline Value

↑ +42%

# Key Benefits & Business Impact

Transforming lead management with automation and unified visibility



## Zero Manual Data Entry

All lead information automatically captured and mapped to ERPNext fields, eliminating manual input errors and saving sales team time.

100% Automation Rate



## Real-Time Lead Capture

Instant lead creation within seconds of customer inquiry, enabling immediate follow-up and higher conversion rates.

<3s Response Time



## Unified Customer View

Single dashboard showing all customer interactions across channels with complete history and context.

5/5 Channels Unified



## Traceable Campaign ROI

Track conversion rates and revenue by lead source, enabling data-driven marketing investment decisions.

68% Avg Conversion

## Before vs After Integration

### ✖ Before: Manual Process

- Manually copy-paste lead data from multiple platforms
- Data entry errors and missing information
- Delayed response times (hours or days)
- No visibility into lead source performance
- Leads falling through cracks

### ✔ After: Automated Integration

- ✔ Automatic lead creation in real-time
- ✔ Structured, validated data with zero errors
- ✔ Instant response (under 3 seconds)
- ✔ Complete analytics and ROI tracking
- ✔ 100% lead capture with no losses

INTEGRATION COMPLETE

# One Pipeline. Unlimited Channels.

Regardless of where the customer comes from, ERPNext captures the inquiry, structures it, assigns it, tracks it, and converts it — all in one unified pipeline.

5

Channels Integrated

100%

Automation Rate

0

Data Loss

<3s

Response Time



WhatsApp



Facebook



Instagram



Website



Google



ERPNext CRM