

Social Media Channels Integration with ERPNext CRM

Automated Lead Capture & Unified Pipeline Management



WhatsApp



Facebook



Instagram



Website



Google

Batch
Processing

Stream
Processing

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

APIs &
Webhooks



Real-Time

Instant lead capture from all channels



Automated

No manual data entry required



Unified

Single pipeline for all sources

Integration Layer

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



REST
API

ERPNext CRM

Lead Created

Pipeline Management

Analytics

Notifications



Reliable

Zero data loss with validation

WhatsApp Business → ERPNext CRM

Message-to-lead automation with instant data capture



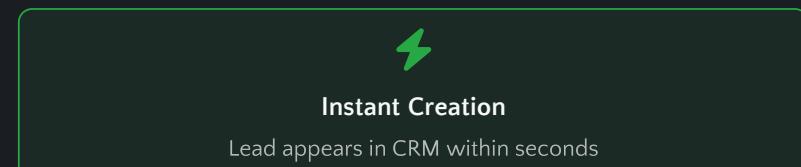
Data Mapping: WhatsApp → ERPNext

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

Lead Name:	John Smith
Phone:	+1 (555) 123-4567

New Lead



CHANNEL INTEGRATION #2

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

Lead Source Analytics



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

CHANNEL INTEGRATION #4

Google Business Profile → ERPNext CRM

Capture high-intent customers from Google searches



Customer Sends
Google Message



Google Sends
via API/Email



Integration Layer
Parses



Lead
Created

Data Mapping: Google → ERPNext

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

Google Business Profile Interface

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

Questions & Answers

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

Message →

Google Business Message Example

From: Mike Thompson

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



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



Quoted



Converted



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



Unified Customer View

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

5/5 Channels Unified



Real-Time Lead Capture

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

<3s Response Time



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