

# CRM Gated Compliance

## Technical Audit & Verification Guide

### 1. Core Intelligence Logic

The compliance engine operates on a Gated Logic principle. In the file `src/app/actions/crm/target-compliance.ts`, the system performs a multi-phase check:

- Phase 1: Real-time Metric Analysis - Aggregates lead and deal data for the assignee.
- Phase 2: Milestone Validation - Compares current achievement against milestone gates.
- Phase 3: Blocking Enforcement - If a milestone is marked "is\_blocking" and the deadline is passed without reaching the goal, the entire mission is terminated (Failed).

### 2. Step-by-Step Verification Protocol

To verify that blocking is functioning correctly, follow this stress test:

#### Step A: Create a "Fail" Scenario

1. Navigate to CRM > Targets > Initialize Target.
2. Set the Period End to a date in the future.
3. Create a Milestone with Metric: "Deals Created", Target: 5.
4. Set the Milestone Deadline to YESTERDAY.
5. Toggle "is\_blocking" to YES (Blue Switch).
6. Click Synchronize Mission.

#### Step B: Trigger Intelligence Sync

1. Go to Targets > Strategic Dashboard (Management).
2. Click "Synchronize Team Data".
3. The system will process the expired gate.

#### Step C: Verify Observation

1. Back in the Targets main list, the status should now be RED ("FAILED").
2. The Progress Bar will indicate non-compliance.

### 3. Strategic Impact for Salesmen

When a Salesman fails a blocking milestone:

- They are flagged on the Admin Management Roster as an "At-Risk Asset".
- Total team revenue synthesis is adjusted to exclude their failed forecast.
- The mission cannot be resurrected without manager intervention (Edit/Update).