

Velasco

Fireflies Call Transcript Integration with DealCloud CRM

Project Summary

Total Estimated Hours 45 Hours	Build Hours 35 Hours
Admin Hours 10 Hours	Integration Platform Zapier

Integration Overview

Automated transfer of Fireflies call transcripts into DealCloud CRM records via Zapier integration, eliminating manual data entry and ensuring comprehensive call documentation across all client touchpoints.

Project Management & Admin Hours Breakdown

- **Requirements Validation:** 2 hours (API access verification and field mapping confirmation)
- **Testing & QA:** 8 hours (comprehensive integration testing, transcript validation, and error handling verification)

Detailed Scope of Work

Story ID	Hours	Workstream Name	Customer Story	Recommended Approach	Assumptions
1	15	API Setup & Authentication	Velasco wants to establish secure connectivity between Fireflies and DealCloud to enable automated transcript transfer	→ Set up Fireflies API connection and webhook configuration in Zapier → Establish DealCloud API authentication and test connectivity → Validate API permissions for both reading Fireflies data and writing to DealCloud → Research and configure DealCloud instance-specific field mappings	→ Velasco provides DealCloud API credentials and admin access → Fireflies API available on all plan levels → DealCloud instance has API enabled and appropriate permissions → Includes DealCloud API discovery and custom field validation time
2	20	Call Transcript Processing & Integration	Velasco wants Fireflies call transcripts automatically written to relevant DealCloud records with proper	→ Build Zapier automation triggered by new Fireflies transcripts → Configure transcript parsing and formatting for DealCloud compatibility	→ Fireflies transcripts include participant information for record matching → DealCloud has appropriate fields/

Story ID	Hours	Workstream Name	Customer Story	Recommended Approach	Assumptions
			formatting and metadata	→ Set up automated record matching logic based on participants, companies, or deal identifiers → Create transcript posting workflow to appropriate DealCloud objects (deals, companies, contacts) → Configure metadata capture including call date, duration, participants, and key topics	objects for storing transcript data
BUILD HOURS TOTAL	35				
ADMIN HOURS TOTAL	10	<i>Requirements Validation (2h) + Testing & QA (8h)</i>			
PROJECT TOTAL	45				