

CRM Automation and Connection SOP

90-Day Seller Appointment Implementation Kit

Version 1.1 | Last Updated October 2, 2026

Purpose: Connect the tools and prove each event has the correct next action.

Requires: Software Functions and System Setup: chosen tools and field map; Seller Resource Templates: resource hosted; Steps 4–5: qualification, follow-up, booking and confirmation rules drafted; Seller Campaign Compliance Checklist: contact review

When to use: Before final Meta setup and launch

Estimated time: 2–4 hours

[Open the Resource Hub](#)

Customize before using

Replace the fields used in your selected template. Use [AGENT NAME], [BROKERAGE], [CITY], [COUNTY] or [NEIGHBORHOOD], [SELLER OFFER], verified [LOCAL MARKET DATA], [BOOKING LINK], [PHONE] and [EMAIL] consistently. Complete any additional bracketed delivery, privacy, property or review fields that apply. Delete instructions and unused alternatives before sending.

Build the workflow in your chosen tool

Use the native automation builder when it supplies the required triggers, conditions, delays, and exits. Otherwise use a tested connector; if automation is unavailable, use the manual procedure below. These rules define the behavior regardless of vendor menus.

Workflow A Accepted resource request

Trigger: form provider confirms a valid accepted submission.

1. Read a unique submission/event ID and stable source tags. Match the CRM contact and seller/property opportunity; create or update without overwriting suppression or the earliest source.
2. Save submitted permissions and their wording/version. Reject invalid required fields before success. If saving fails, display or send a recoverable error and alert the owner.
3. Send the requested resource or acknowledge the real report turnaround. Display the immediate download independently of marketing opt-in.
4. Create an owner task to review seller intent and missing qualification details. Notify the owner and backup through the approved route.
5. Enroll in nurture only if the actual contact choice and applicable rules permit it. Select the timeline branch. Keep delivered resource, marketing permission, and qualification status separate.
6. Send the logical lead tracking event only after successful acceptance and according to permitted tracking choices. Verify browser/server deduplication if both are used.

Workflow B Qualification and replies

Trigger: qualification answers saved or a human confirms missing facts.

Apply Seller Qualification Form's criteria. Store qualified timestamp once; retain the reason and any later change. Ready sellers requesting a conversation receive the calendar. Later sellers get a next task and the permitted nurture path.

Trigger: inbound reply. Pause promotional automation, assign a human reply task, and update the record after the conversation. Never depend on an email open as proof of readiness or receipt.

Trigger: opt-out or decline. Apply the relevant channel suppression immediately, cancel pending affected jobs, preserve the record, and prevent automatic reenrollment. Escalate unclear scope for review without sending more promotion.

Workflow C Booking and reminders

Trigger: confirmed calendar event with appointment ID and opportunity ID.

Verify qualification or route to a human. Store first-booked date if blank. Stop nurture and create the current appointment attempt. Send Appointment Confirmation and Reminder Pack confirmation and schedule the two future reminders; skip elapsed times.

Before each reminder: reread appointment ID, current scheduled time, status, permissions, and timezone. Send only if still valid. On reschedule, mark the previous attempt Rescheduled, cancel its jobs, and create the new attempt using the same opportunity ID. On cancel, stop old jobs and mark Cancelled. No new unique booking count.

Workflow D Appointment outcome

After scheduled time, create an agent task to mark Held, No-show, Cancelled, or Rescheduled. Keep Pending until known. Held requires actual substantive seller conversation; write first-held date once. No-show starts Appointment Confirmation and Reminder Pack recovery. A signed listing writes its own date. Closing and actual GCI are recorded when known, not projected at signing.

Manual fallback

Export accepted form submissions securely each business day. Match them to the CRM by stable ID and seller/property. Send the requested resource; assign a qualification task and reply manually through permitted channels. On agreed booking create the calendar invite, confirmation, and reminders; use the appointment log. During an outage, pause paid delivery if you cannot reliably accept and handle new inquiries. Recover only affected unsent actions; do not bulk resend completed jobs or suppressed marketing.

Error and retry handling

Store event ID, result, timestamp, and error message. Retry by the same ID so a repeated event does not send duplicate messages. Alert owner on failed record creation, delivery, calendar update, or reminder cancellation. Compare the provider's accepted form count with CRM deduplicated records each day; explain legitimate duplicates and spam/test exclusions. A webhook response alone does not prove the full journey worked.

End-to-end test log

Test	Expected behavior	Evidence to record
Valid generic request	One CRM opportunity; resource; owner task	IDs, timestamps, received email
Invalid email or missing required field	No successful submit/lead event	Error view and event check
Double click or event retry	One logical opportunity and delivery action	Same ID, no duplicate send
No optional marketing permission	Requested resource; no marketing enrollment	Permission fields and job list

Test	Expected behavior	Evidence to record
Ready qualified seller	Qualified timestamp; calendar path	Answers and routing
Unknown/out-of-area/represented seller	Appropriate pending or human-review path	Status and task
Reply	Promotion paused; human task	Reply and stopped jobs
Marketing opt-out	Suppression; pending affected sends cancelled	Opt-out and job state
Book	First-booked date; confirmation and valid jobs	Appointment ID and messages
Last-minute book	Skip past reminder time	Correct remaining jobs
Reschedule	Old attempt/jobs stopped; same opportunity	Old/new IDs and job state
Cancel	No future old reminders	Status and cancelled jobs
Held vs no-show	Correct outcome and first-held rule	Agent note and tracker dates
Connection failure	Visible error; safe manual recovery	Alert, retry, no duplicates

Use your own test contact details and mark all test records excluded. Never use real homeowner data in public screenshots or recording examples.

You are done when

All test cases pass with one logical record, correct messages, correct task owner, and visible error handling.