

CRM Integration | Auto-create and track SalesPad Interactions from PA Future Consideration

- CI Cavallo IT
- **Forum name:** #Order Intelligence Platform

As a user, I want SalesPad interactions to be auto-created for At Risk or Churned (configurable) customers or ship to addresses, and populated with the PA analysis that caused the follow-up, and the status tracked in PA, so I don't have to manually export these customers or ship to addresses and create interactions in SalesPad and bounce back and forth.

Can be architected so similar logic can be applied to any CRM integration, just different custom adapter to connect.

Linked to from Profit Analytics - Interviews page in Confluence