Trishul CRM Zernio Three Week Integration Plan

AI assisted solo development for customer connection and basic advertising reporting

Target: a controlled pilot after 15 working days. Connect Meta and Google Ads to Trishul, show basic campaign performance, preserve the existing Meta lead flow, and verify customer isolation and recovery. This is a three-week integration target, not a commitment to full Ads Manager functionality or a general production launch.

The three week plan

Week	Focus	Expected outcome
1 / Days 1-5	Prove and connect	Verify vendor workflows; connect test accounts; build the customer connection flow and save verified account mappings.
2 / Days 6-10	Report and preserve leads	Sync basic campaign metrics; build a simple dashboard; keep existing Meta leads reaching the CRM without duplicates.
3 / Days 11-15	Harden and pilot	Test isolation, reconnects and failure recovery; complete QA; release to one approved pilot customer if acceptance gates pass.

Included in the target

- Meta and Google Ads customer connection, account selection, connection status and reconnect handling.
- A simple campaign list and dashboard for spend, impressions, clicks and available platform-reported conversions, with a date filter and last-sync status.
- Existing Meta lead ingestion and CRM linkage remain operational. Retain available campaign and ad identifiers; prevent duplicate leads.
- Server-side integration, background sync, access checks, basic error recovery and a controlled pilot.

How the target stays practical

Reuse the existing NestJS and MongoDB backend, Next.js admin, Meta webhook/polling flow and BullMQ. Use AI for code scaffolding, UI, tests and debugging; reserve time for real-account verification. Keep the UI simple, use existing CRM screens where possible, and avoid a broad redesign.

Baseline: one developer working 15 focused working days with AI assistance and available test accounts. Vendor enablement, platform approvals, missing permissions and customer response delays can extend the calendar. Reconfirm feasibility at the end of Week 1.

Working day delivery plan

The checkpoints below keep the scope small and make blockers visible early. Move to the next stage only when its dependency works; reduce optional scope before compressing security or QA.

Days	Build focus	Completion check
1-2	Capability proof	Connect authorized Meta and Google Ads test accounts; list accounts; read sample spend and clicks; verify the current Meta test-lead flow.
3-4	Backend connection	Add the server-side Zernio integration, tenant/account mapping and validated authorization callback. Verify account ownership before saving it.
5	Connection screen	Add connect, account selection and status UI. Review reconnect requirements and freeze the pilot scope after the Week 1 gate.
6-7	Background reporting	Sync campaign identities and basic daily metrics with BullMQ. Store account currency, time zone, sync time and useful errors.
8	Basic dashboard	Show the campaign list, agreed metrics and date filter. Make loading, empty, stale and failed states understandable.
9	CRM lead continuity	Test existing Meta webhook and polling ingestion. Check deduplication and available source IDs; avoid replacing a working lead path prematurely.
10	Data reconciliation	Compare sample dashboard results against both platforms with matching dates, currency and time zone. Record expected metric differences.
11	Isolation and secrets	Test cross-customer access attempts and role restrictions. Keep keys server-side and remove credentials and lead details from logs.
12	Reconnect and recovery	Test expired/revoked access, reconnects, retries and quota errors. Confirm failed jobs can be inspected and replayed safely.
13	Failure testing	Exercise duplicate events, slow responses, partial sync and unavailable APIs. Preserve existing CRM data and show recoverable failures.
14	End to end QA	Test connection and reporting on both platforms plus Meta lead continuity; fix release-blocking defects and prepare support notes.
15	Controlled pilot	Enable one approved customer, observe the first sync and lead checks, and record acceptance. Keep a rollback path and disable new features if checks fail.

End of Week 1 gate: both platforms must connect and return the required sample data. If access or a required workflow is blocked, reset the remaining dates rather than assuming the issue will disappear.

Deliverables and release boundaries

Deliverables at the end of the target

- A tested customer connection and reconnect flow for Meta and Google Ads, with verified account mappings.
- A simple campaign dashboard with basic metrics, date selection, connection health and sync freshness.
- Working background sync and preserved Meta lead-to-CRM ingestion, including duplicate protection.
- QA evidence for both platforms, pilot acceptance notes, and a short operating guide for reconnects, failed jobs and rollback.

Acceptance gates for the pilot

- **Access:** a customer cannot read or change another customer’s accounts or data; credentials remain server-side.
- **Data:** sample reports reconcile using agreed definitions; duplicate lead events do not create duplicate CRM records; unavailable attribution is not invented.
- **Recovery:** reconnects and safe job retries work, failures are visible, and the existing lead path remains available until any cutover is accepted.
- **Approval:** no unresolved critical defects; the pilot customer and enabled features are approved. Wider production release requires a separate readiness decision.

Stretch only after the core scope passes

Add basic pause/resume only if the exact vendor operation has been verified, appropriate user permissions and a final confirmation screen are in place, and the connection/reporting scope is already complete. It is not a required three-week deliverable. Do not enable any operation that could spend money without explicit approval.

Next phase and exclusions

Full campaign creation, creative and lead-form creation, budget editing, advanced targeting, Google Performance Max/Display/Demand Gen creation, automated optimization, conversion uploads, advanced attribution, rich exports and extensive historical backfills are outside this plan. Estimate them separately after the pilot.

Dependencies to resolve at kickoff

Confirm Zernio access, authorized Meta and Google Ads test accounts, required roles, a callback domain and a deployable environment. Verify customer/profile mapping and the required account combinations. [1] Check exact platform permissions and production access rather than assuming all advertised features are enabled. [2] [3] Confirm quotas, pricing and support terms before onboarding live customers. [4]

References

Official Zernio documentation checked 4 November 2026; capability and account-specific behavior must be verified during Week 1.

[1] Multi-tenant architecture | [2] Meta Ads guide

[3] Google Ads guide | [4] Pricing