Zero Token Labs
SOVEREIGN AI INFRASTRUCTURE

PRODUCT OVERVIEW

The Deal Ledger.

A CRM auto-update agent: every call, email, and Slack thread a rep has gets read, checked against your rules, and written to the CRM — usually before the rep has hung up the next call.

55	254	487	20h 49m
INTERACTIONS INGESTED	FIELDS EXTRACTED	CRM WRITES LOGGED	MANUAL ENTRY AVOIDED

01 · THE PROBLEM

The CRM is always a few calls behind reality

Reps don't skip CRM updates because they're careless — they skip them because updating a record properly takes longer than the call did. So the fields get filled in later, from memory, inconsistently, or not at all. By the time a manager pulls a pipeline review, half of it is a guess.

One of our own pilot conversations put it plainly: "our forecast is fiction because the CRM is three weeks behind reality." That's not a rep being lazy. That's what happens when the system asks a human to do data entry as a second job.

4 hrs / wk

Lost per rep to manual CRM hygiene — Friday afternoons spent reconstructing what happened on the week's calls.

3 weeks

How far behind reality a hand-updated pipeline runs by the time anyone notices — usually mid-forecast-call.

Zero

Fields updated after a real call where next steps, budget, and a decision-maker were agreed — and none of it hit the record.

THE COST, COMPOUNDED

Every stale field is a decision made on bad data: a forecast call run off a guess, a deal reviewed weeks after the moment it turned, a handoff where the next rep inherits nothing the customer actually said.

02 · THE PIPELINE

Three tools, one deal, no human in the loop until it matters

Every interaction runs the same chain. Nothing reaches the CRM without first being read, checked, and — if it fails a rule — held for a human instead of guessed at.

STEP 1
Ingest the call, email, or Slack thread

▶

STEP 2
Extract the fields it supports

▶

STEP 3
Check the guardrails

▶

STEP 4
Write to the CRM, sandbox first

01

extract_fields

Reads the conversation

Applies your own plain-language field definitions to the transcript. Every value returns with a confidence score and the exact sentence that justified it.

02

check_guardrails

Decides what's safe

Stage rules, field-level permissions, record-creation rules — config-driven, never a model's judgment call. High-stakes fields get held, not guessed.

03

write_crm

Matches, then writes

Checks whether the Account, Contact, or Opportunity already exists before creating anything. Every write lands in your sandbox first, fully logged.

04

notify

Tells the channel

A change digest posts the moment a write lands. Visible automation gets trusted and left alone; invisible automation gets overridden.

IT CREATES THE RECORDS, FOR REAL

A brand-new company doesn't have to exist in the CRM first

Given write permissions, these are real Salesforce API calls, not a simulation. The pipeline matches before it creates — so a first-ever discovery call with a company nobody has entered yet produces the Account, the Contact, and the Opportunity in that single write, then keeps writing stage, amount, and next step onto them.

Account
Account.create()
Looked up by email domain, then by name. Created only if neither matches.
ANY INTERACTION

Contact
Contact.create()
Looked up by email, then linked to the Account — including one just created.
ANY INTERACTION

Opportunity
Opportunity.create()
Created only once the guardrail clears — the record-creation rule requires a real call or meeting.
CALLS & MEETINGS ONLY

If that first touch is an email instead, the Account and Contact are still created — but the Opportunity is held until a real conversation happens. Entity resolution is cached per interaction, so many fields from one call reuse the same resolved records instead of spawning duplicates.

LIVE · THE DASHBOARD

Every write, staged and accounted for

deal-ledger.internal / dashboard

OVERVIEW

The Deal Ledger

Sales conversations, extracted automatically and staged to your CRM sandbox — with a full audit trail of what was written, why, and by which guardrail decision.

- **Salesforce** Connected · production
- **Slack** Not configured
- **Claude** Extraction key present
- **Postgres** Ledger DB reachable

55	254	487	83	4	20h 49m
Interactions ingested	Fields extracted	CRM writes logged	Rejected / needs review	Active guardrails	Est. manual entry avoided

RECENT ACTIVITY

View audit log →

Updated **Opportunity Close Date** to "2026-07-30" — 9m ago
SANDBOX — PASSED ALL GUARDRAILS AT AUTO-WRITE TIER

Updated **Opportunity Stage Name** to "Closed Won" — 9m ago
SANDBOX — PASSED ALL GUARDRAILS AT AUTO-WRITE TIER

Updated **Opportunity Budget Confirmed** to "true" — 17m ago
REJECTED — FIELD PERMISSION MARKS BUDGET_CONFIRMED__C HUMAN-ONLY

Updated **Opportunity MEDDPIC Economic Buyer** to "CFO" — 17m ago
REJECTED — CONFIDENCE 0.60 IS BELOW THE 0.75 AUTO-WRITE THRESHOLD

Updated **Opportunity Next Step** to "Schedule a call this week for the prospect's team to see the extraction live." — 17m ago
SANDBOX — PASSED ALL GUARDRAILS AT AUTO-WRITE TIER

Logged activity: Slack interaction logged — 17m ago
SANDBOX

CAPTURED SIGNALS

View all extractions →

BANT Budget Confirmed = True — 0.55
"CFO reviewed the revised proposal, no objections on price." · 17m ago

Next Step = Schedule a call this week — 0.95
"can we get that on the calendar this week?" · 17m ago

Deal Stage = Negotiation/Review — 0.70
"she wants one more call with your team before signing" · 17m ago

MEDDPIC Economic Buyer = CFO — 0.75
"I'll take it to our CFO this week." · 17m ago

Competitor Mentioned = Clari — 0.90
"we're also taking a look at Clari for forecasting visibility." · 17m ago

COMPETITIVE INTELLIGENCE

Gong	4 mentions
Clari	3 mentions
HubSpot	1 mention

Live from the running dashboard — real interactions, real extractions, real guardrail decisions.

03 · THE PIPELINE BOARD

Every deal, rolled up from what was actually said

No deal on this board was typed in by hand. Every card is reconstructed from the writes the pipeline made — one pipeline, ten real prospect conversations, sitting at every stage from first call to signed.

deal-ledger.internal / pipeline

PROSPECTING 2

Juniper & Finch
Get pricing in front of the team for a rollout to both wholesale reps.
PAIN IDENTIFIED

Northwind Logistics
Technical call Thursday 2pm with the IT lead — extraction rules + pilot scope.
PAIN IDENTIFIED

NEEDS ANALYSIS 2

$120,000
Brightline Health
Claims-ops deep dive Tuesday — map custom fields to standard extraction.
PAIN IDENTIFIED

Atlas Field Services
VP reviews the requirements doc, then formal proposal.
PAIN IDENTIFIED

PROPOSAL 2

$78,000
Copperline Mfg.
Prospect reviews the proposal with their VP of Sales.
PAIN IDENTIFIED

Harborview Hospitality
Scoped proposal for the CRM-automation piece, within the week.
PAIN IDENTIFIED

CLOSED WON 3

$210,000
Pinnacle Grid Energy
Signature staged for Aug 15 — only the signature left.

$140,000
Meridian Capital
Countersigned MSA returned within the hour, signed by Sept 30.

$95,000
Summit Ridge Software
Order form with legal — only countersignature remains.

Four of seven stages shown. Negotiation/Review (Vantage Point Analytics, $85,000) and Closed Lost sit on the live board.

04 · GUARDRAILS, VISIBLE

The system says no as often as it says yes

A rule engine is only trustworthy if you can see it working. Every guardrail is a plain sentence, not a JSON blob buried in config — and every rejected write lands in the same audit trail as every accepted one, with the reason attached.

A deal can only move to **"Closed Won"** once Close Date Confirmed has been captured.	stage_transition	ACTIVE
Budget Confirmed is human-only — the agent never writes it, no matter the confidence.	field_permission	ACTIVE
New **Opportunity** records are created only from call interactions.	record_creation	ACTIVE

One real deal — Vantage Point Analytics — where the guardrails did their job on both sides of the same conversation:

deal-ledger.internal / pipeline / vantage-point-analytics

CHANGE HISTORY

Updated Next Step — legal engaged directly, reporting back by end of week.
Sandbox — passed all guardrails

Updated Amount to "$85,000"
Sandbox — passed all guardrails

Updated BANT Timeline — six-week implementation window
Rejected — confidence 0.70, below the 0.75 threshold

Updated Budget Confirmed to "true"
Rejected — field marked human-only

Two writes went straight through. Two were held — one on confidence, one because that field is never allowed to auto-write, ever. Same call, four fields, four independent decisions.

05 · THE MATH

Manual entry vs. the ledger

MANUAL CRM ENTRY

- Whatever the rep remembers, whenever they get to it
- No record of which sentence justified a field change
- The manager finds the gap at the next pipeline review
- High-stakes fields typed in as casually as everything else

THE DEAL LEDGER

- Written within minutes of the call ending
- Every write logged with the source quote behind it
- A Slack digest posts the moment it happens
- Ambiguous or high-stakes fields held for a human, on purpose

Dimension	Manual entry	The Deal Ledger
Time to update a field	Whenever the rep gets to it	Minutes after the call
Consistency	Varies by rep, by day	Same standard, every call
Audit trail	Usually none	Old value, new value, source sentence, confidence
Judgment calls	Silently guessed	Explicitly gated — human-only fields, confidence thresholds
Duplicate records	A recurring cleanup job	Matched before anything is created

06 · SOVEREIGN, AND YOURS

Connected to your CRM, not a subscription to ours

The credential that lets this write to Salesforce lives in your own database, encrypted, connected through a one-click OAuth flow you control — not a shared login, not a third party holding your refresh token.

ON YOUR INFRASTRUCTURE

The extraction, guardrail, and write-back logic runs as a dedicated server you control end to end — not a black box you're renting access to.

YOUR DATA STAYS YOURS

Every interaction, extraction, and write is your own audit trail in your own Postgres instance — not a side effect of using someone else's SaaS.

WHO THIS IS FOR

Any revenue team that already knows its pipeline goes stale between calls, and wants the record to reflect what was actually said — not what someone remembered three weeks later.

GET IN TOUCH

Your CRM,
finally current.

Want to see it run against your own stage names, your own field definitions, your own Salesforce sandbox? We'll wire it up before any of your reps notice.