

Automation · Service guide

CRM Integrations

Every lead and booking, straight into your CRM.

Calls, chats, forms and ads create leads in many places. We connect them to the CRM you already run, such as Jobber, Housecall Pro, ServiceTitan, HubSpot or GoHighLevel, so customers, jobs and notes are created without anyone typing them in.

Message only

How it works	Works in the background
Best for	Platforms & Integrations
You stay in control	Only the fields you approve are written
First step	A short call with no obligation

How this helps

What it means for your business

Leads from calls, chats and forms get typed into the CRM late, wrong or not at all.

Repetitive reading, sorting and writing is prepared for you, so your team starts from a draft instead of a blank page. You check the work before it is used.

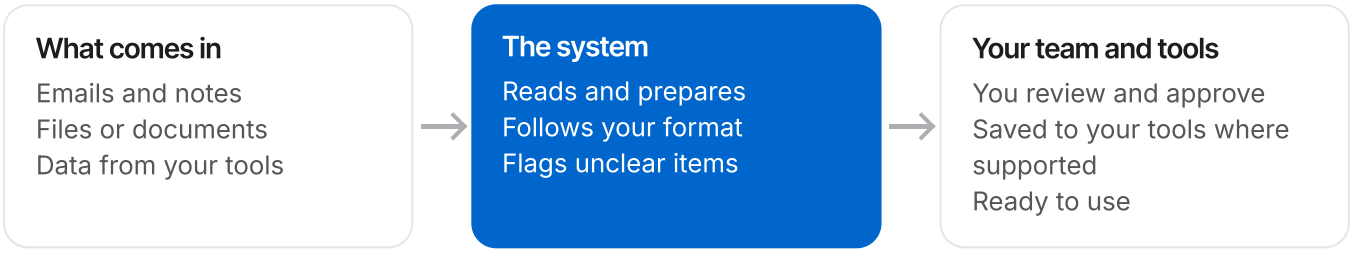
What you get

- No more leads typed in by hand
- No duplicates, matched by phone and email
- Notes and call summaries attached to the right customer
- Clean reports on where your jobs really come from

What changes day to day

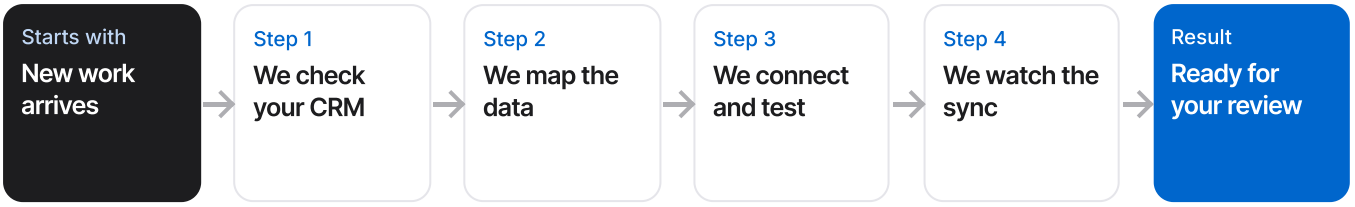
	Common today	With this service
Starting point	A blank page	A prepared draft
Format	Varies by person	Follows the format you set
Unclear items	Easy to miss	Flagged for a person to check
Your time	Spent on repetitive work	Spent on review and decisions
Final say	Your team	Still your team

How it fits with your business



How it works

From start to finish



Step 1

We check your CRM

What it allows, your fields and how you work.

Step 2

We map the data

Which source creates what, and how duplicates are matched.

Step 3

We connect and test

Using test records first, then real ones.

Step 4

We watch the sync

Error alerts and a monthly check.

Example · Work scene

Leads arrive by phone, website chat and Google ads, and someone types them into Jobber at night.

Works in the background

What happens next

Every lead appears in Jobber with notes attached, and no duplicates.

CRM sync

Source	AI receptionist call
CRM	Jobber
Created	Client, job request and note
Duplicates	Matched by phone, none created
Status	Synced in 4 seconds

How easy it is

We do the heavy lifting

Most of the work happens on our side. You make the decisions, and we tell you exactly what we need.

What we handle

- Agree the format with you
- Connect your tools where supported
- Set the rules and the review step
- Test it on real examples
- Adjust the results after launch

What you do

- Share your rules and examples
- Approve the format
- Review the first results
- Tell us what to change

Service levels

Start simple, go further when you are ready

Level 1

Draft mode

We prepare the work and you approve it before it is used.

Level 2

Connected

Runs with your tools where supported, on the schedule you set.

Level 3

Advanced

More rules, several workflows working together, and reporting.

The right level is confirmed during discovery, based on your business and the tools you use.

What we need from you

- Examples of how the work is done today
- Access to the tools it needs to work with
- The format you want the result in
- Who on your team approves it

How we get started

1. A short call about your business
2. A clear plan and scope
3. Setup and testing with you
4. Go live with your approval

Why Calvyrn

Why businesses choose to work with us

Built for your business
Your rules, your wording and your tools. Not a one-size template.

You approve first
Nothing goes live until you have seen it and said yes.

Start small
Begin with one service or one first version, then add more if it helps.

One team
AI systems, automations, websites and web applications in one place.

Plain language
You always know what is being built, why, and what comes next.

Honest limits
We tell you what a system cannot do and where a person should stay involved.

You stay in control

- Only the fields you approve are written
- Existing records are never deleted
- Every sync is logged, so you can see what changed

Questions you may have

Does it phone anyone?
No. This service works in writing and makes no phone calls.

Does it work with ServiceTitan?
Often, yes. Some ServiceTitan features need API access approved for your account. We check what is available on the first call before promising anything.

Will it create duplicate customers?
No. We match by phone number and email first, and only create a new record when there is no match.

Can you move us from one CRM to another?
Yes. We migrate customers, jobs and notes, test the import with you and keep a backup of the old data.

Important notes

- Examples in this guide use fictional businesses, names and details.
- Results depend on your business, tools, customers and how the service is set up. We do not guarantee revenue, bookings or search rankings.
- AI can make mistakes. That is why approvals, clear limits and human hand-off are part of the setup.
- Features depend on your plan and on the tools you use. The final scope is confirmed during discovery and in your proposal.
- This guide is not legal, medical, tax or financial advice.

See how it would work for you
Tell us about your business. There is no obligation.

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