



# NIRAVU

## Architecture Assessment

# Data Pulse Solutions (DEMO)

### Zoho CRM System Architecture Review

Client-facing architecture assessment prepared from the current Atlas evidence package.

ASSESSMENT DATE

**April 2026**

ASSESSMENT REFERENCE

**ATLAS-48F0AA5F**

ASSESSMENT SCORE

**51**

**STRUCTURAL REVIEW RECOMMENDED**

Structured review advised before scaling.

Composite score across Architecture, Automation, Governance, and Reliability.

# Table of Contents

Overall Score & What It Means

Architecture Snapshot

Structural Architecture Map

Automation Concentration (Top Modules)

Access & Oversight

System Reliability

System Health, Themes & Action Plan

Appendix: Module-by-Module Details

Appendix: Field Density Detail

## OVERALL SCORE & WHAT IT MEANS

NIRAVU ATLAS OVERALL SCORE

# 51

### STRUCTURAL REVIEW RECOMMENDED

Structured review advised before scaling.

COMPOSITE SCORE EXPLANATION

Composite score across Architecture, Automation, Governance, and Reliability.

#### HOW TO INTERPRET THIS SCORE

This is not a pass/fail score. It is a management tool for understanding where your CRM is strongest and where focused improvement is needed.

The value is in comparing strengths and weaknesses across Architecture, Automation, Governance, and Reliability.

The rest of this report explains what is driving each area, then translates those signals into priority themes and an action agenda.

#### ASSESSMENT METHODOLOGY

Atlas uses an intentional metadata-first methodology so leaders can evaluate system design, controls, and risk posture without exposing customer content.

**This assessment is based on system metadata and configuration. We did NOT access, read, or analyze customer data, emails, notes, or transactions.**

#### NO AI INFERENCE

Your data never passes through an AI model. The Atlas scan reads your CRM configuration and structural metadata through authenticated, read-only API connections. Every score, insight, and recommendation in this report is produced by deterministic rules-based logic — no customer data, records, emails, or notes are processed by any large language model or AI inference service, at any stage. AI-assisted analysis is available as a future opt-in capability.

- ✓Read-only API access
- ✓OAuth 2.0 authentication
- ✓Metadata-only analysis
- ✓TLS 1.2+ encryption in transit

#### INTEGRATION SCOPE

Atlas scans Zoho CRM configuration only. When integrations such as Zoho CRM or Zoho Sign surface data within CRM, Atlas assesses the CRM-visible portion of that integration. The connected applications themselves are not accessed.

#### NIRAVU PLATFORM CONTEXT

##### Atlas

Assessment and mapping



##### Pathfinder

Prioritization



##### Navigator

Execution and ongoing management

ARCHITECTURE

53



WHAT THIS EVALUATES

How the CRM is structurally designed: modules, relationships, field design, and structural alignment.

WHAT WE OBSERVED

Current structure includes 62 modules, 932 fields, 250 related lists, and 1,918 relationship edges.

HOW TO IMPROVE

Confirm which modules are core operating systems and protect their design standards first.

AUTOMATION

20



WHAT THIS EVALUATES

How work is executed in the system: workflows, blueprints, and automation coverage.

WHAT WE OBSERVED

Automation inventory shows 51 configured assets across 7 hotspot modules.

HOW TO IMPROVE

Set one operating standard for automation design in high-impact modules.

GOVERNANCE

85



WHAT THIS EVALUATES

How control and ownership are managed: roles, profiles, ownership, and access clarity.

WHAT WE OBSERVED

Governance configuration includes 3 roles, 3 profiles, 7 configured users, and 3 active users.

HOW TO IMPROVE

Assign clear executive ownership for governance standards and decision rights.

RELIABILITY

54



WHAT THIS EVALUATES

How dependable and recoverable the system is: backups, safeguards, and system trust.

WHAT WE OBSERVED

Backup controls currently show 0 source surfaces, 0 backup jobs, and 0 destinations.

HOW TO IMPROVE

Confirm minimum reliability standards for backup, verification, and retention control ownership.

# Architecture Snapshot

ARCHITECTURE SUBSCORE ANCHOR

**53** Architecture  
MEDIUM

This snapshot summarizes current tenant scale and the strongest confirmed operating signals in the Atlas package.

MODULES

**62**

Current module inventory

FIELDS

**932**

Current field footprint

RELATED LISTS

**250**

Confirmed relationship-list surfaces

GRAPH EDGES

**1918**

Confirmed graph relationship edges

## Operational Data Scale

Operational record counts were not included for this assessment run.

Operational record counts were not included for this assessment run.

## Priority Modules for Review

These modules currently show the strongest concentration of Architecture, Automation, Governance, or Reliability signals and are the highest-priority areas for review in this assessment.

### Leads

Composite priority score: 65.5

### Deals

Composite priority score: 62.2

### Contacts

Composite priority score: 54.2

### Accounts

Composite priority score: 49.0

## MODULE INVENTORY BY TYPE **62 TOTAL**

CRM native active **22** 35%

Integration-managed **13** 21%

Custom-built **2** 3%

CRM native hidden **6** 10%

System framework **19** 31%

## INTEGRATION ECOSYSTEM

### Zoho Bookings

1 module

Appointments

*Atlas assesses the CRM-visible configuration only; Zoho Bookings itself is outside CRM scan scope by design.*

### Zoho Bookings

1 module

Appointments Rescheduled History

*Atlas assesses the CRM-visible configuration only; Zoho Bookings itself is outside CRM scan scope by design.*

### Calendarbookings

1 module

Calendar Bookings

*Atlas assesses the CRM-visible configuration only; Calendarbookings itself is outside CRM scan scope by design.*

### Services

1 module

Services

*Atlas assesses the CRM-visible configuration only; Services itself is outside CRM scan scope by design.*

### Zoho Finance

4 modules

Invoices

Estimates

Sales Orders

Purchase Orders

*Atlas assesses the CRM-visible configuration only; Zoho Finance itself is outside CRM scan scope by design.*

### Zoho Sign

3 modules

Zoho Sign Documents

Zoho Sign Recipients

Zoho Sign Document Events

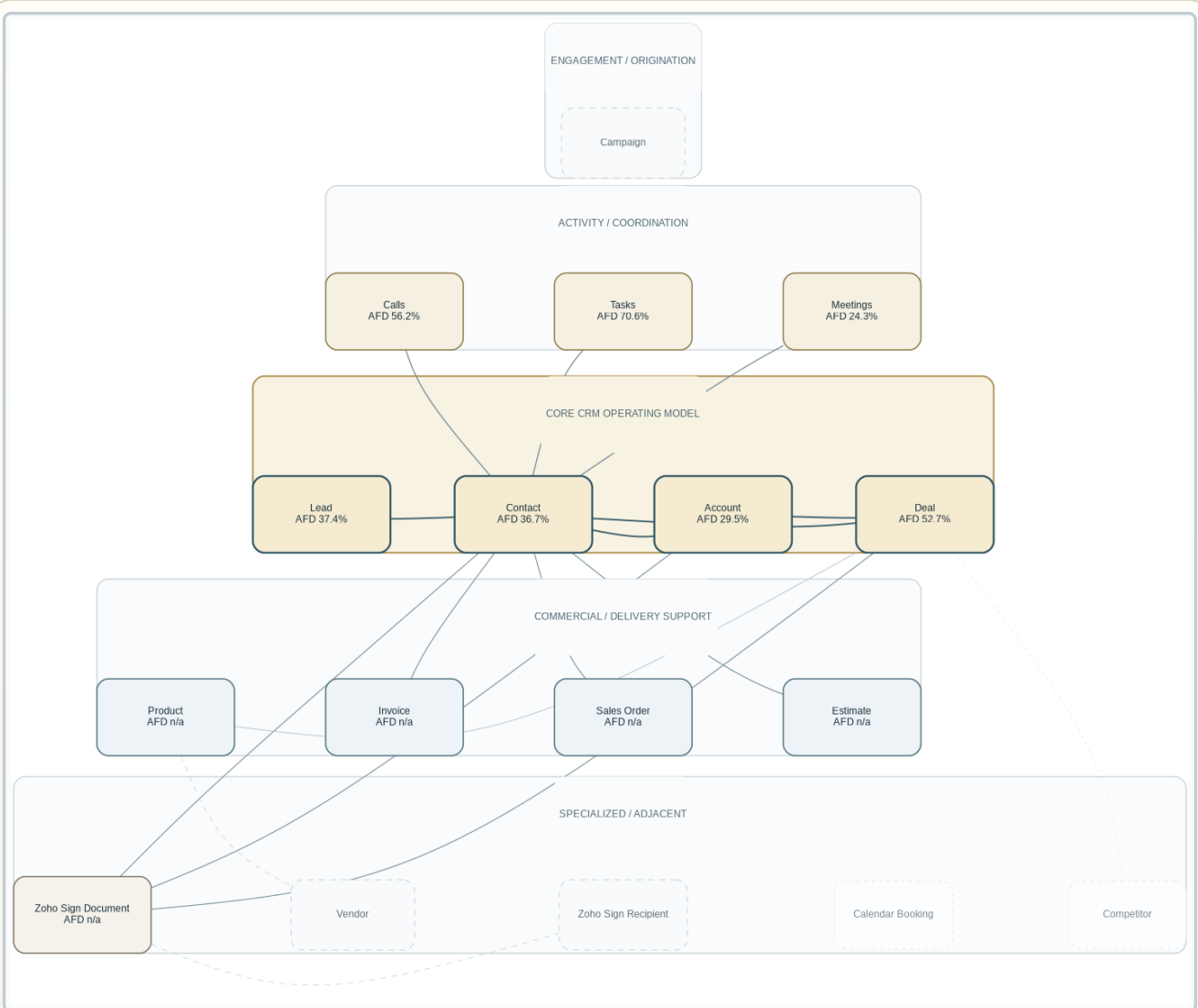
*Atlas assesses the CRM-visible configuration only; Zoho Sign itself is outside CRM scan scope by design.*

## INTENTIONAL ARCHITECTURE — HIDDEN NATIVE MODULES

The following native CRM modules are present but have been intentionally hidden by an administrator: **Quotes, Sales Orders, Purchase Orders, Invoices, Cases, Solutions.**

This is consistent with deliberate administrative decisions, not gaps or errors. This is consistent with a Zoho CRM integration — Books manages billing natively. No corrective action is required.

# Structural Architecture Map



## LEGEND

Use this legend to read structural lanes, contextual module treatments, and AFD population signals in the diagram.

- **AFD (Average Field Density):** shows how consistently reportable fields are populated by module.
- **AFD scope:** system-required/generated fields and unsupported-count surfaces are excluded.
- **Structural lanes:** operating core, adjacent domains, and broader extension layers show concentration bands.
- **Primary categories:** each lane represents where operational load and dependency concentration are most visible.
- Light-gray contextual modules show visible connected structure not promoted into the primary structural set.
- Pale dotted modules represent hidden or disabled modules shown for structural context only.
- Connectors represent confirmed relationship evidence included in this bounded structural view.

## STRUCTURAL CONCENTRATION

### Concentration Pattern

Structural concentration remains narrow compared with the overall module footprint.

#### Operating core

# 4

Small set of modules carries the heaviest structural load.

Lead, Contact, Deal, Account

#### Adjacent domain layer

# 12

Second tier supports commercial execution and nearby specialist workflows.

Product, Invoice, Price Book, Vendor

#### Broader extension layer

# 25

Wider tenant breadth exists at materially lower structural density.

Service, Function, Price Book, Email Analytics

## PRIMARY STRUCTURAL LAYER

### Operating Core

4 modules carry the clearest operating core in the current relationship evidence.

#### Lead

Front-end intake hub supporting qualification and early pipeline coordination.

238 graph-edge signals

23 related lists

17 linked modules

#### RELATIONSHIP CONTEXT

Contact, Account

#### REVENUE FLOW

Product

#### SUPPORTING DOMAINS

Campaign

#### Contact

Relationship anchor connecting customer context, pipeline movement, and downstream activity.

207 graph-edge signals

22 related lists

17 linked modules

#### RELATIONSHIP CONTEXT

Lead, Account

#### REVENUE FLOW

Deal, Product

#### Deal

Revenue workflow hub linking commercial progression, products, and supporting artifacts.

178 graph-edge signals

19 related lists

15 linked modules

#### RELATIONSHIP CONTEXT

Contact, Lead, Account

#### REVENUE FLOW

Product

#### Account

Account context hub tying people, revenue activity, and follow-up into a shared record.

168 graph-edge signals

21 related lists

13 linked modules

#### RELATIONSHIP CONTEXT

Lead, Contact

#### REVENUE FLOW

Product, Deal

## ADJACENT DOMAIN LAYER

### Adjacent Business Domains

#### Revenue flow

Commercial lifecycle modules that sit immediately around the operating core.

3 modules represented

Product, Invoice, Price Book

#### Commercial support

Supporting surfaces that help pricing, vendors, and controlled documents move revenue work forward.

1 modules represented

Vendor

#### Supporting domains

Additional modules that reinforce the core without carrying equal structural weight.

8 modules represented

Zoho Sign Document, Campaign, Zoho Sign Recipient, Service, Function

## SHARED INFRASTRUCTURE

### Shared Connective Infrastructure

#### Collaboration and documents

Shared notes, attachments, and communication surfaces preserve context across customer and commercial workflows.

Note Attachment

Most visible across Lead, Contact, Account pathways.

#### Activity coordination

Meetings, tasks, calls, and related activity layers extend follow-up across the operating core.

Meeting Task Call

Most visible across Lead, Contact, Account pathways.

#### Execution support

Checklist-style surfaces add lightweight execution support around adjacent workflows.

Checklists

Most visible across Lead, Contact, Account pathways.

## STRUCTURAL IMPLICATION

### Takeaway

This tenant is structurally centered on relationship and revenue workflows, with adjacent commercial support domains and shared activity and document infrastructure extending those processes across the broader CRM.

## Integration Ecosystem

The following third-party and cross-platform integrations expose modules into the CRM. Each integration adds configuration surface that Atlas cannot fully inspect — only the CRM-visible footprint is shown.

### Zoho Bookings

ACTIVE INTEGRATION

1 CRM-visible module

#### Appointments

No record count

---

*Atlas assesses the CRM-visible configuration only. Zoho Bookings itself is outside CRM scan scope — these modules represent the CRM integration surface only.*

### Zoho Bookings

ACTIVE INTEGRATION

1 CRM-visible module

#### Appointments Rescheduled History

No record count

---

*Atlas assesses the CRM-visible configuration only. Zoho Bookings itself is outside CRM scan scope — these modules represent the CRM integration surface only.*

### Calendarbookings

ACTIVE INTEGRATION

1 CRM-visible module

#### Calendar Bookings

No record count

---

*Atlas assesses the CRM-visible configuration only. Calendarbookings itself is outside CRM scan scope — these modules represent the CRM integration surface only.*

### Services

ACTIVE INTEGRATION

1 CRM-visible module

#### Services

No record count

---

*Atlas assesses the CRM-visible configuration only. Services itself is outside CRM scan scope — these modules represent the CRM integration surface only.*

### Zoho Finance

ACTIVE INTEGRATION

4 CRM-visible modules

#### Invoices

No record count

#### Estimates

No record count

#### Sales Orders

No record count

#### Purchase Orders

No record count

Atlas assesses the CRM-visible configuration only. Zoho Finance itself is outside CRM scan scope — these modules represent the CRM integration surface only.

## Zoho Sign

ACTIVE INTEGRATION

3 CRM-visible modules

### Zoho Sign Documents

No record count

### Zoho Sign Recipients

No record count

### Zoho Sign Document Events

No record count

Atlas assesses the CRM-visible configuration only. Zoho Sign itself is outside CRM scan scope — these modules represent the CRM integration surface only.

## AUTOMATION CONCENTRATION (TOP MODULES)

# Automation Concentration (Top Modules)

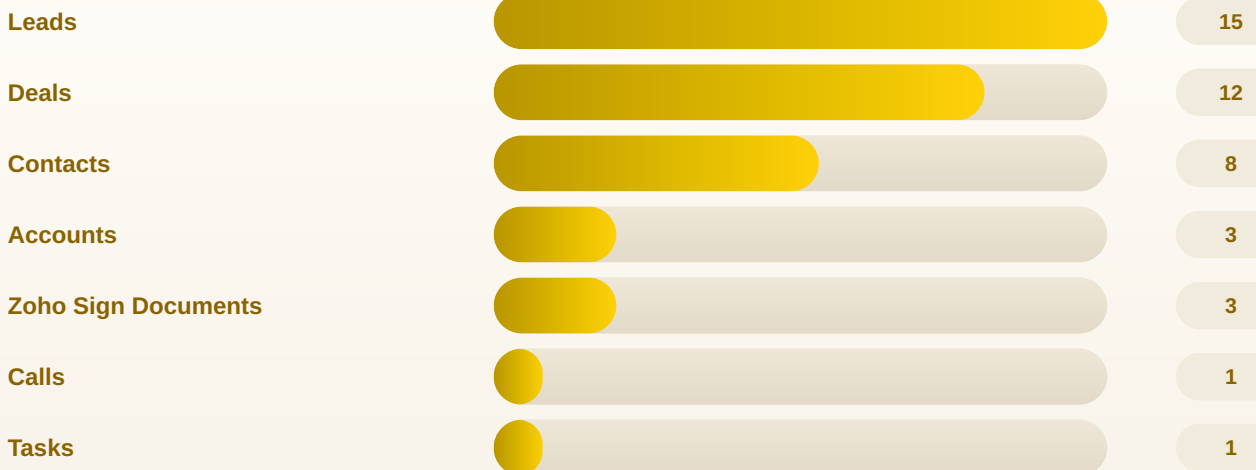
AUTOMATION SUBSCORE ANCHOR

**20** Automation

LOW

Top modules by automation volume based on 51 extracted automation assets.

## Automation Distribution by Module



## Leads

Total automation assets: 15

### AUTOMATION MIX

Workflows	3
Assignment Rules	1
Notification Rules	3
Email Templates	5
Blueprints	1
Custom Buttons	2

## Deals

Total automation assets: 12

### AUTOMATION MIX

Workflows	5
Notification Rules	2
Email Templates	3
Custom Buttons	2

## Contacts

Total automation assets: 8

### AUTOMATION MIX

Workflows	1
Notification Rules	1
Email Templates	4
Custom Buttons	2

## Accounts

Total automation assets: 3

### AUTOMATION MIX

Email Templates	1
Custom Buttons	2

## Zoho Sign Documents

Total automation assets: 3

### AUTOMATION MIX

Workflows	2
Custom Buttons	1

## Calls

Total automation assets: 1

### AUTOMATION MIX

Validation Rules	1
------------------	---

## Tasks

Total automation assets: 1

### AUTOMATION MIX

Blueprints	1
------------	---

## WORKFLOW EXECUTION HEALTH

2 active workflows are dormant (null or >90-day execution gap)

WORKFLOW NAME	STATUS	LAST EXECUTED
Big Deal Rule	ACTIVE	2025-11-21 <span>⚠ Dormant</span>

WORKFLOW NAME	STATUS	LAST EXECUTED
Email - Assigned to Sales	ACTIVE	2026-03-06
Send Welcome Email when a Contact is created	ACTIVE	2026-02-26
Update Quote BA Sent Date Field	ACTIVE	2026-01-09
Email - Assigned to CTO	ACTIVE	2026-03-03
Populate_Account_Product_Name_in_DealName	ACTIVE	2026-01-08 <span style="color: orange;">⚠ Dormant</span>
Update Quote BA Signed field in Quotes	ACTIVE	2026-01-09
SEND NDA	ACTIVE	2026-03-05
Lead Assignment - No Interest Listed	ACTIVE	2026-03-03
Update Deal Name	ACTIVE	2026-02-26
When a Deal is closed send a notification	ACTIVE	2026-03-05

#### CUSTOM FUNCTION AUDIT

⚠ **8 custom functions are active but source code is not accessible to Atlas — no documented audit trail available.**

Update Deal Name	Not available	Source not accessible
Update Deal in Sign Document	Not available	Source not accessible
Update Quote Total	Not available	Source not accessible
Update Quote Signed Field in Quotes	Not available	Source not accessible
Update Quote BA Sent Field	Not available	Source not accessible
Populate Deal Name in Subject Quote Creation	Not available	Source not accessible
SEND NDA	Not available	Source not accessible
Populate_Account_Product_Name_In_DealName	Not available	Source not accessible

# Access & Oversight

GOVERNANCE SUBSCORE ANCHOR

**85** Governance  
HIGH

USERS

**7**

Configured user records

ROLES

**3**

Role configuration inventory

PROFILES

**3**

Profile configuration inventory

ACTIVE USERS

**3**

Active status in current system configuration

## Access Configuration Distribution

Active users



3

Inactive users



4

Administrative access



5

## Role Distribution

Sales

1 users

CEO

6 users

## Profile Distribution

Sales Team

1 users

Administrator

5 users

SupportProfileInternal

1 users

## USER ACCESS REGISTER

⚠️ 4 of 4 inactive users retain elevated role or profile assignments — privilege persistence risk.

⚠️ 1 active admin account uses non-company email domain — identity verification risk.

NAME	ROLE	PROFILE	STATUS	EMAIL DOMAIN	RISK FLAGS
Pam Adams	Sales	Sales Team	ACTIVE	datapulsesol.com	

NAME	ROLE	PROFILE	STATUS	EMAIL DOMAIN	RISK FLAGS
Samantha Lee	CEO	Administrator	ACTIVE	datapulsesol.com	Confirmed admin
Maya Chen	CEO	Administrator	DISABLED	datapulsesol.com	Privilege persistence
Jordan Blake	CEO	Administrator	DISABLED	datapulsesol.com	Privilege persistence
Carlos Ramirez	CEO	Administrator	DISABLED	datapulsesol.com	Privilege persistence
Shehryar Yousaff	CEO	Administrator	ACTIVE	gmail.com	Confirmed admin Non-company email
Zoho Support User	CEO	SupportProfileInternal	DISABLED	zohocrmusersupport.com	Privilege persistence

# System Reliability

RELIABILITY SUBSCORE ANCHOR

**54** Reliability  
MEDIUM

Reliability signals are anchored in backup control metadata and supplemented by recoverability, verification, retention, and operational-confidence signals.

Backup controls were identified, but no schedule/run/catalog records were present for this tenant.

SOURCE SURFACES

0

Systems with backup control evidence

BACKUP JOBS

0

Configured scheduled jobs

DESTINATIONS

0

Configured or runtime-observed destinations

EXECUTION RECORDS

0

Observed run or catalog execution records

VERIFICATION RECORDS

0

Catalog validation records

RETENTION POLICIES

0

Explicit retention policy records

No authoritative backup topology mappings were observed for this tenant.

## Backup Coverage and Verification Status

Unknown-state mapping counts are not applicable because no authoritative mappings were evaluable.

No backup schedule, run, or catalog records were found for this tenant in the control DB.

# System Health, Themes & Action Plan

Leadership briefing: this section consolidates the current operating posture, key decisions, strategic themes, and sequenced actions in one view.

## DATA QUALITY SPOTLIGHT

**18%**

### Lead Attribution Health

Contacts · Lead\_Source

*Attribution breaks at lead-to-contact conversion if low*

**0%**

### Pipeline Visibility

Deals · Reason\_For\_Loss\_\_s

*Win/loss analysis not possible if 0%*

**5%**

### Call Outcome Capture

Calls · Call\_Result

*Calls logged but outcomes not captured if low*

## CRITICAL FIELD POPULATION GAPS

The following business-critical fields are below the 20% population threshold on core modules. These gaps affect attribution, forecasting, and reporting accuracy.

**Contacts** · Lead\_Source

**18% populated**

### Lead Source

*Attribution breaks at lead-to-contact conversion — marketing ROI cannot be calculated.*

**Deals** · Reason\_For\_Loss\_\_s

**0% populated**

### Reason for Loss

*Win/loss analysis is not possible — pipeline improvement decisions lack evidence.*

**Calls** · Call\_Result

**5% populated**

### Call Outcome

*Calls are logged but outcomes are not captured — activity quality cannot be measured.*

**Accounts** · Account\_Type

**2% populated**

### Account Type

*Segmentation and targeting are not possible without account type classification.*

## What we are seeing

### ARCHITECTURE CONCENTRATION

Core dependencies currently center on Lead, Contact, Deal, Account.

### AUTOMATION CONCENTRATION

Leads carries 15 automation assets in the current package.

### GOVERNANCE CLARITY

Control structures currently include 3 roles and 3 profiles.

### TOP STRUCTURAL + OPERATIONAL RISKS

- Ownership boundaries and decision accountability require clearer alignment across teams.
- Core module dependencies remain concentrated, so changes in priority modules can ripple broadly.
- Execution dependencies are overlapping across architecture, automation, governance, and reliability surfaces.

## Top decisions

### DECISION 1

Clarify which modules should remain core operating systems versus supporting records.

### DECISION 2

Confirm who owns governance and reliability controls across business and system leadership.

### DECISION 3

Decide where automation should be standardized versus reduced to protect execution quality.

## Key themes

### Key relationship mappings must be confirmed before structural changes proceed

RISK THEME    MEDIUM CONFIDENCE    MEDIUM SEVERITY

Complete validation for the 247 unresolved relationship mappings and approve canonical link definitions before structural changes proceed.

LEADERSHIP FOCUS    Approve the dependency model for core modules before schema changes.

### Automation is concentrated in a small set of modules

RISK THEME    HIGH CONFIDENCE    MEDIUM SEVERITY

Standardize automation design in Contacts, Deals, Accounts, and Leads and retire overlapping buttons and templates.

LEADERSHIP FOCUS    Adopt one trigger and exception standard for priority workflows.

### Architecture operating alignment

RISK THEME    HIGH CONFIDENCE    MEDIUM SEVERITY

Schema boundaries are not explicit enough, which raises conflict risk during coordinated releases.

LEADERSHIP FOCUS    Set hard change gates for high-impact relationships.

## Ownership boundaries across systems require clarification

RISK THEME    HIGH CONFIDENCE    HIGH SEVERITY

Define ownership and synchronization boundaries for crm invoices vs books invoices across systems before additional integration changes.

LEADERSHIP    Set mandatory restore-testing cadence and recovery pass criteria.  
FOCUS

## Key structural dependencies must be confirmed before structural changes proceed

RISK THEME    HIGH CONFIDENCE    MEDIUM SEVERITY

Execution and verification records must be confirmed to support dependable backup commitments.

LEADERSHIP    Approve minimum verification and retention controls for all backup sources.  
FOCUS

## Action plan

Actions are sequenced for near-term execution first, followed by targeted validation steps.

## High-Confidence Actions

Prioritized actions are ordered for immediate execution based on business impact and confidence.

### ACTION 1

#### Access configuration is concentrated in one role profile

Rebalance role assignments to reduce concentration in the 'CEO' cohort and distribute control coverage across roles.

Suggested owner: Executive Sponsor | Suggested timing: Next | Theme area: Governance | Evidence confidence: high

### ACTION 2

#### Automation is concentrated in a small set of modules

Standardize automation design in Contacts, Deals, Accounts, and Leads and retire overlapping buttons and templates.

Suggested owner: Revenue Operations | Suggested timing: Next | Theme area: Automation | Evidence confidence: high

### ACTION 3

#### Automation.custom buttons has repeated extraction limits

Resolve repeated extraction failures for automation; custom buttons under CUSTOM BUTTONS FETCH FAILED and rerun coverage validation.

Suggested owner: Operations Lead | Suggested timing: Next | Theme area: Reliability | Evidence confidence: high

### ACTION 4

#### Cross module relationship structure is dense

Sequence structural changes through an impact review of 212 inter-module links and 250 related-list surfaces before rollout.

Suggested owner: System Owner | Suggested timing: Next | Theme area: Architecture | Evidence confidence: high

### ACTION 5

#### Key structural dependencies must be confirmed before structural changes proceed

Resolve the 19 missing relationship targets to stabilize structural integrity and downstream automation behavior.

Suggested owner: Operations Lead | Suggested timing: Next | Theme area: Reliability | Evidence confidence: high

## Further Investigation

Confirm investigation items before broader rollout commitments.

### ACTION 6

#### **Administrative access indicators appear broadly distributed**

Rationalize administrative access distribution across users and enforce explicit approval criteria for elevated privileges.

Suggested owner: Executive Sponsor | Suggested timing: Next | Theme area: Governance | Evidence confidence: medium

### ACTION 7

#### **Key relationship mappings must be confirmed before structural changes proceed**

Validate related-list link definitions and resolve unmatched mappings.

Suggested owner: System Owner | Suggested timing: Next | Theme area: Architecture | Evidence confidence: medium

# Module-by-Module Details

Module-by-module details summarize observable metadata for each major module: structural links, automation assets, communication assets, and role-level ownership patterns.

## Leads

### STRUCTURE

#### Related lists

- Notes
- Calls
- Events
- Tasks
- ChronologicalView
- ChronologicalView History
- Calls History
- Tasks History
- Events History
- Emails

### AUTOMATION

#### Workflow rules

- Email - Assigned to Sales
- Email - Assigned to CTO
- Lead Assignment - No Interest Listed

#### Blueprints

- Lead nurturing process

#### Assignment rules

- New Lead Assignment

### COMMUNICATION ASSETS

#### Email templates

- Form Submission Outreach
- Chat Submission Outreach
- Cold Call Outreach Email
- Lead Assignment
- Leads Zoho Sign Template

### OWNERSHIP SIGNALS

#### Role-level baseline ownership pattern (system-wide)

- CEO: 85.7%
- Sales: 14.3%

## Deals

### STRUCTURE

#### Related lists

- Notes
- Attachments
- ChronologicalView
- Calls
- Events
- Tasks
- ChronologicalView History
- Calls History
- Events History
- Tasks History

### AUTOMATION

#### Workflow rules

- Big Deal Rule
- Populate\_Account\_Product\_Name\_in\_DealName
- SEND NDA
- Update Deal Name
- When a Deal is closed send a notification

#### Blueprints

No blueprints present.

#### Assignment rules

No assignment rules captured.

### COMMUNICATION ASSETS

#### Email templates

- Deal Closed - Assign Mgr
- Deals Zoho Sign Template
- Big Deal Alert

### OWNERSHIP SIGNALS

#### Role-level baseline ownership pattern (system-wide)

- CEO: 85.7%
- Sales: 14.3%

## Contacts

### STRUCTURE

#### Related lists

- Notes
- Attachments
- Open Appointments
- ChronologicalView
- Calls
- Events
- Tasks
- Appointments History
- ChronologicalView History
- Tasks History

### AUTOMATION

#### Workflow rules

- Send Welcome Email when a Contact is created

#### Blueprints

No blueprints present.

#### Assignment rules

No assignment rules captured.

### COMMUNICATION ASSETS

#### Email templates

- Reconnecting with Contact
- Welcome Email
- Test Template
- Contacts Zoho Sign Template

### OWNERSHIP SIGNALS

#### Role-level baseline ownership pattern (system-wide)

- CEO: 85.7%
- Sales: 14.3%

## Accounts

### STRUCTURE

#### Related lists

- Notes
- Attachments
- ChronologicalView
- Calls
- Events
- Tasks
- ChronologicalView History
- Calls History
- Events History
- Tasks History

### AUTOMATION

#### Workflow rules

No workflow rules captured.

#### Blueprints

No blueprints present.

#### Assignment rules

No assignment rules captured.

### COMMUNICATION ASSETS

#### Email templates

- Account Zoho Sign Template

### OWNERSHIP SIGNALS

#### Role-level baseline ownership pattern (system-wide)

- CEO: 85.7%
- Sales: 14.3%

## Zoho Sign Documents

### STRUCTURE

#### Related lists

- Notes
- Attachments
- Emails
- Tasks
- Events
- Calls
- Tasks History
- Events History
- Calls History
- CheckLists

### AUTOMATION

#### Workflow rules

- Update Quote BA Sent Date Field
- Update Quote BA Signed field in Quotes

#### Blueprints

No blueprints present.

#### Assignment rules

No assignment rules captured.

### COMMUNICATION ASSETS

#### Email templates

No email templates linked.

### OWNERSHIP SIGNALS

#### Role-level baseline ownership pattern (system-wide)

- CEO: 85.7%
- Sales: 14.3%

# Field Density Detail

Module-level field density detail derived from the canonical artifact normalized/analysis/field\_density\_by\_module.json. Observed fields only.

Account		AFD 29.5%	
51 RECORDS			
FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Ownership	0.0%	Annual Revenue	7.8%
Parent Account	0.0%	Billing Country	13.7%
Shipping Country	0.0%	Billing City	21.6%
SIC Code	0.0%	Billing Code	21.6%
Tag	0.0%	Billing Street	21.6%
Account Type	2.0%	Change Log Time	56.9%
Employees	2.0%	Industry	62.7%
Shipping City	2.0%	Website	62.7%
Shipping Code	2.0%	Billing State	74.5%
Shipping State	2.0%	Phone	80.4%
Shipping Street	2.0%	Last Activity Time	96.1%
Description	5.9%	Account Number	100.0%

Account		AFD 29.5%	
51 CONTINUED RECORDS			
FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Locked	100.0%		

## Call

AFD 56.2%

20 RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Caller ID	0.0%	Reminder	65.0%
Dialled Number	0.0%	Call Agenda	90.0%
Tag	0.0%	Related To	90.0%
Call Result	5.0%	Call Purpose	100.0%
Description	5.0%	CTI Entry	100.0%
Call Duration (in seconds)	35.0%	Outgoing Call Status	100.0%
Contact Name	55.0%	Scheduled in CRM	100.0%
Last Activity Time	55.0%	Subject	100.0%

## Contact

AFD 36.7%

131 RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Description	0.0%	Mailing Country	5.3%
Other Street	0.0%	Mailing City	6.9%
Other Zip	0.0%	Mailing State	9.2%
Secondary Email	0.0%	Lead Source	18.3%
Tag	0.0%	Title	84.0%
Other City	0.8%	Phone	89.3%
Other Country	0.8%	Last Activity Time	96.2%
Other State	0.8%	Account Name	96.9%
Salutation	2.3%	First Name	97.7%
Mobile	3.1%	Layout	98.5%
Mailing Zip	3.8%	Email	100.0%
Mailing Street	4.6%	Email Opt Out	100.0%

## Contact

AFD 36.7%

131 CONTINUED  
RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Full Name	100.0%		

## Deal

AFD 52.7%

77 RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Reason For Loss	0.0%	Lead Source	67.5%
Tag	0.0%	Contact Name	87.0%
Next Step	1.3%	Change Log Time	88.3%
Description	2.6%	Product	88.3%
Type	7.8%	Amount	89.6%
BA/Quote Sent	10.4%	Expected Revenue	89.6%
BA/Quote Signed	11.7%	Account Name	100.0%
NDA Signed	16.9%	Last Activity Time	100.0%
Quote Total	19.5%	Locked	100.0%
Service	22.1%	Overall Sales Duration	100.0%
Lead Conversion Time	24.7%	Probability (%)	100.0%
NDA Sent	36.4%	Sales Cycle Duration	100.0%

## Lead

AFD 37.4%

86 RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Annual Revenue	0.0%	Country	16.3%
Description	0.0%	City	22.1%
Salutation	0.0%	State	30.2%
Secondary Email	0.0%	Interested In Products	53.5%
Tag	0.0%	Phone	58.1%
No. of Employees	1.2%	Company	72.1%
Mobile	2.3%	Lead Status	72.1%
Website	2.3%	Last Activity Time	84.9%
Industry	3.5%	First Name	96.5%
Street	5.8%	Lead Source	97.7%
Zip Code	5.8%	Email	98.8%
Title	11.6%	Email Opt Out	100.0%

## Lead

AFD 37.4%

86 CONTINUED  
RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Full Name	100.0%		

## Meeting

AFD 24.3%

53 RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Check-In Address	0.0%	Zip Code	0.0%
Check-In City	0.0%	Location	1.9%
Check-In Comment	0.0%	Online Meeting External UUID	22.6%
Check-In Country	0.0%	Provider	22.6%
Check-In State	0.0%	Contact Name	35.8%
Check-In Sub-Locality	0.0%	Description	62.3%
Check-In Time	0.0%	Last Activity Time	75.5%
Latitude	0.0%	Related To	90.6%
Longitude	0.0%	All day	100.0%
Participants	0.0%	Checked In Status	100.0%
Tag	0.0%		

## Task

AFD 70.6%

111 RECORDS

FIELD LABEL	DENSITY (%)	FIELD LABEL	DENSITY (%)
Tag	0.0%	Due Date	100.0%
Contact Name	24.3%	Locked	100.0%
Description	25.2%	Priority	100.0%
Closed Time	44.1%	Send Notification Email	100.0%
Last Activity Time	85.6%	Status	100.0%
Related To	97.3%		



PREPARED BY NIRAVU

# Your CRM architecture is now mapped.

## NEXT STEPS

### WHAT THIS ASSESSMENT REPRESENTS

- The first architectural map of the CRM
- A baseline for system improvement
- A foundation for future optimization

Assessment reference: ATLAS-48F0AA5F

Assessment date: April 09, 2026

### NEXT STEPS

- Implement changes
- Run Atlas again
- Repeat

---

### NIRAVU JOURNEY

Atlas provides the evidence map; use this report to guide prioritization and execution with confidence.