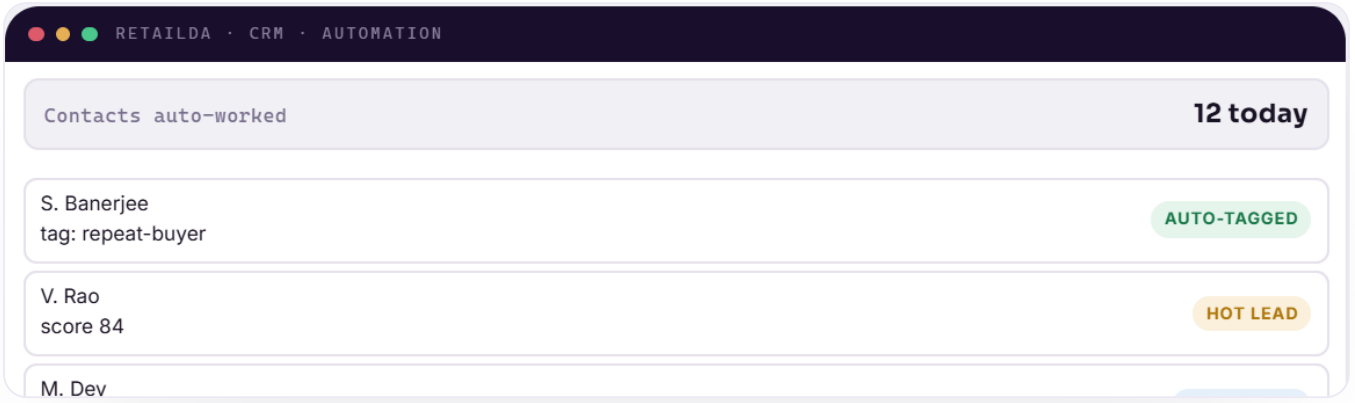
PRODUCT DATASHEET · SOCIAL COMMAND CENTER

AI CRM Automation

Pro-grade automation + AI chat/voice — WhatsApp, email & SMS on one ledger record.

A complete CRM engine, not a light clone — the full automation stack with every add-on plus an AI chat & voice assistant, extended by custom task sequencing and an MCP server. Leads → quotes → orders → invoices on the same ledger as stock and billing; WhatsApp, email and SMS all log against the same record.



97
terminals live on one deployment

5 yrs
production on the original build

Air-gap
proven at defence sites

₹20L
lost in 48h — none since

WHAT IT CHANGES ON THE FLOOR

Lead to order pipeline
Leads mature into quotations, orders and invoices without re-entry — one record end to end.

Full automation engine
Complete campaign, funnel, sequence and conditional-content machinery — the whole stack integrated into the ledger, not bolted on.

WhatsApp built in
Templates, campaigns and a unified inbox over the official WhatsApp Business channel — receipts, reminders and replies in one thread.

Automation with goals
Visual funnels with triggers, branches and benchmark goals — custom task sequencing queues follow-ups, renewals and due-chases on schedule.

AI chat & voice assistant
The built-in AI answers, drafts and triages over chat and voice; agents and tools query contacts, campaigns and ledger events over MCP.

Service tickets
Complaints and service calls bind to the customer and the item serial sold to them.

In production since 2021 — retail, defence, education, manufacturing & hospitality

AVAILABILITY

From the Growth plan

RUNS ON

Any device · offline-first · your infrastructure or ours

COMPLETE CAPABILITY SET — 14 FEATURES

- ✓ Leads → quotes → orders → invoices on one record
- ✓ Unified inbox across WhatsApp, email & SMS
- ✓ Sequences & abandoned-cart follow-up
- ✓ Scheduled follow-up work queues
- ✓ Segments, lists & tags
- ✓ Sales pipeline stages
- ✓ Pro-grade automation engine + AI chat/voice assistant
- ✓ WhatsApp Business channel — templates, campaigns, replies
- ✓ Automation funnels with goals & benchmarks
- ✓ Service tickets bound to the item serial sold
- ✓ Per-customer lifetime-value view
- ✓ Engagement scoring
- ✓ Full activity timeline per record
- ✓ Custom task sequencing · MCP-server agent access

BUILT FOR

Retail · Wholesale · Service · D2C

THE ECONOMICS

	RETAILDA™	PER-SEAT SAAS PATTERN
Pricing unit	Per site — staff accounts unlimited	Per user — every hire compounds the bill
Modules	Toggle on what you need, priced like apps	Per-module add-ons stacked on per-seat tiers
Connectivity	Runs fully offline — forever, if you want	No link, no sale
Data	One database per client — export anytime	Multi-tenant pool, export rituals

How AI CRM Automation compares

Verified against current competitor pricing and feature documentation — retailda.com/compare#ai-crm-automation

ALTERNATIVE	WHERE RETAILDA™ WINS
HubSpot	Contact-record CRM in the same ledger as billing and stock — quotes convert to orders without a sync boundary, and pricing isn't contact-metered.
Zoho CRM	A real standalone CRM — telephony, journey builders and a thousand integrations for a sales org, priced per user. Ours is a fully integrated automation stack with an AI chat & voice assistant, custom task sequencing and an MCP server, running on the ledger that already bills and stocks the site.

DEPLOYMENT MODELS

MODEL	WHAT IT MEANS
Shared cloud	Fastest start — provisioned, patched and monitored for you. Per-site pricing, unlimited staff.
Private cloud	Your own isolated instance — one client, one database. No multi-tenant pooling.
TolsTek Host	On-premise enterprise server — ECC memory, power-loss-protected NVMe, hardware RAID. Also runs the local AI daemons.
Air-gapped	Zero external calls, permanently — proven at defence installations where isolation is mandatory.

WORKS WITH — the platform fabric

UPI & QR · EMV terminals · ESC/POS & thermal · LoRaWAN · Zigbee · MAVLink · MCP agents · ONDC (testing) · WhatsApp Business · Excel/CSV · CloudPRNT · OTAs via channel pipeline

RUNS WITH

Social Publisher · Campaign Studio · Content Revival · Forms & Capture · A.B.M

Deployment & rollout

What a AI CRM Automation deployment actually looks like — bring this page to whoever signs off.

ROLLOUT

01 **Sandbox first**
Your catalogue, opening stock and flows run in a sandbox before anything touches production.

02 **Guided migration**
Bulk import of items, barcodes, suppliers and opening stock — Excel/CSV in one pass.

03 **Pilot site**
One counter or one site goes live first — measured against your old process, not promises.

04 **Staged rollout**
Remaining sites switch over on your schedule — staged, sandbox-first cutover.

COMMERCIAL MODEL

Pricing	From the Growth plan — priced per site, never per user. Staff accounts are unlimited.
Ownership	Your data, your keys, your export — leave with everything. No data lock-in.
Support	Real engineers, ticket-based. Feature unlocks are toggles, not projects.

From the Growth plan

Sign up today — retailda.com/signup · no card required to start

Talk to an engineer

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CALL: +91 - 87778 40671
WHATSAPP: +91 - 94751 16711

Meta · ZOHO · MSG91 · OpenAI

RetailDA