

Agency Snapshot Architecture & Deployment Standard

THE OPEN CRM & AUTOMATION ACADEMY | STANDARD OPERATING PROCEDURE | AGENCY ARCHITECTURE

Mission: 100% free, zero-paywall education for small businesses and agencies. Wilmington, DE 19801.

EXECUTIVE SUMMARY & OPERATIONAL SCOPE

Systematic blueprint for packaging, version-controlling, and pushing snapshots into sub-accounts without overwriting client custom data. Includes conflict resolution protocols and custom val

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- 1. Snapshot Modular Design: Funnels, Workflows, Pipelines & Tags
- 2. Custom Value & Custom Field Naming Taxonomies
- 3. Pushing Updates to 100+ Live Sub-Accounts Without Overwriting Data
- 4. Conflict Resolution & Partial Snapshot Merge Protocols
- 5. Snapshot Share Links & Agency Marketplace Distribution
- 6. Automated Post-Import Quality Assurance Checklist

INSTITUTIONAL INTEGRITY & FAIR QUOTE IMPLEMENTATION

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