

Lynked Up Pro

Social Media + Advertisement Engine Build Spec

Multi-platform ad campaign, lead capture, attribution, and ad-to-nurture implementation spec for Lynked Up Pro

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Prepared for: Lynked Up Technologies / Johnson Family Trust

Operating lens: executive business development analyst, CTO, and AI engineer

This document is implementation-oriented. It identifies gaps, responsible AI opportunities, revised workflows, data/API changes, QA gates, and offshore development stories. It is not legal advice. Counsel should review TCPA, CAN-SPAM, privacy, and platform-specific ad policy requirements before production.

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Table of Contents

1. Executive Summary
2. Product Vision and Non-Negotiables
3. Platform Coverage and Integration Assumptions
4. Core Feature Modules
5. Ad-to-Nurture Architecture
6. AI Use Cases and Guardrails
7. Data Model and API Spec
8. UX / Admin Screens
9. Campaign Recipes and Examples
10. Attribution, Reporting, and Optimization
11. Post-Build Review: Failure Risks and Fixes
12. Offshore Development Backlog
13. Release Plan and Source Notes

1. Executive Summary

This build spec defines a Social Media + Advertisement Engine for Lynked Up Pro that connects paid and owned channels directly into the SmartStorm Nurture Engine. The objective is not just to run ads. The objective is to create a closed-loop acquisition system: launch localized campaigns, capture leads, prove consent, route leads to the right playbook, schedule appointments, educate customers, equip reps, and measure source-to-close revenue.

The first version should prioritize reliable lead ingestion, ad attribution, campaign templates, and ad-to-nurture mapping. Direct campaign creation should be phased by platform API availability and partner approval. Some platforms offer stronger self-serve APIs than others. Where a platform has limited lead or campaign APIs, Lynked Up Pro should support manual/import or partner-connected workflows without pretending full automation exists.

Operating principle: every ad lead becomes a structured CRM event with source, campaign, consent proof, service intent, and next best playbook. No lead should sit in a platform inbox waiting for manual export.

2. Product Vision and Non-Negotiables

Theme	Requirement
Closed-loop growth	Campaign -> lead -> nurture -> appointment -> estimate -> job -> review/referral -> retargeting.
Local service focus	Built for roofing and construction: storm, retail replacement, leak/emergency, remodel, commercial, seasonal maintenance, and property managers.
Compliance first	Channel opt-in, form consent proof, quiet hours, unsubscribe, review disclosure, platform policy, and tenant-specific approvals are enforced before automation.
Responsible AI	AI can draft, classify, summarize, recommend, and select approved content. AI cannot invent offers, guarantee outcomes, impersonate humans, or target sensitive traits.
Tenant control	Every tenant controls service areas, offers, budget limits, creative approvals, knowledge base, lead routing, playbook mapping, and channel activation.
Attribution integrity	All source IDs, UTMs, click IDs, form IDs, and offline conversion events are preserved and deduped.
Human handoff	Ambiguity, complaints, urgent leaks, insurance complexity, and low AI confidence trigger rep or manager tasks.

3. Platform Coverage and Integration Assumptions

The platform plan below distinguishes between lead capture, campaign management, messaging, and conversion/attribution. The engineering team should verify each API scope and account eligibility during connector implementation because platforms change access requirements and beta availability.

Platform	Primary role in Lynked Up Pro	Integration path	Cautions
Facebook + Instagram / Meta	Local awareness, storm response, instant form leads, retargeting, social proof campaigns.	Meta Lead Ads / Instant Forms lead retrieval and webhook ingestion; Marketing API for reporting/campaigns where approved; Conversions API for server-side events.	App review, business verification, token lifecycle, permission scopes, lead retention windows, platform policy.
Google	High-intent search, local services, lead form assets, retargeting, branded/nonbranded search.	Google Ads Lead Form Webhook for CRM delivery; Google Ads API for campaign/reporting; offline conversion upload where enabled.	Webhook key validation, OAuth/developer token, call tracking, consent, offline conversion dedup.
LinkedIn	Commercial roofing, property managers, builders, real estate, facilities, HOA and B2B audiences.	LinkedIn Lead Gen Forms and Lead Sync APIs; campaign/reporting via Marketing API program.	Partner/API access, B2B field mapping, leadSync permissions, lower volume but higher account value.
Reddit	Niche local research, homeowner communities, storm/insurance discussion, B2B education, skepticism handling.	Reddit Lead Generation Ads where available; Zapier/partner or API pathway; Reddit Ads API for campaign management/reporting; Conversions API for server-side events.	Community tone is different; avoid overly promotional copy; beta limitations; lead data handling and policy constraints.
WhatsApp	Conversational follow-up in markets where customers prefer WhatsApp.	WhatsApp Business Platform / Cloud API, approved message templates, inbound session messaging, webhooks.	Template approval, opt-in, conversation windows, category rules, pricing, regional preferences.
Nextdoor	Hyperlocal neighborhood credibility, storm response, referral/recommendation-based local demand.	Nextdoor developer/Ads API where account has access; conversion API for attribution; manual/import fallback for limited access.	API access may require approval or account manager; do not scrape neighborhood content; local community etiquette.

4. Core Feature Modules

Module	Feature scope	MVP acceptance criteria
Connected Accounts	OAuth/credential management, account selection, permission status, token health, webhook status, platform eligibility notes.	Tenant can connect/disconnect accounts; expired tokens create alerts; secrets stored outside app DB.
Campaign Blueprint Library	Prebuilt roofing/construction campaign recipes: storm inspection, retail roof replacement, leak emergency, financing, commercial bid, maintenance, referral/review.	Admin can choose blueprint, service area, budget, dates, CTA, offer, playbook, and approval status.
AI Creative Assistant	Generate draft headlines, primary text, descriptions, form questions, thank-you screen text, and landing page copy from approved tenant knowledge.	AI output requires approval before publishing; prohibited claims flagged; platform character limits enforced.
Lead Form Builder / Mapper	Platform-specific form fields, custom questions, consent text, privacy policy URL, thank-you CTA, CRM field mapping.	A lead form maps to service_type, urgency, role, address, phone, email, consent, campaign IDs, and default playbook.
Ad-to-Nurture Mapper	Map source/campaign/ad/form/service to playbook, rep assignment, routing rule, speed-to-lead channel, and education track.	New lead automatically creates CRM event and correct nurture instance within target SLA.
Audience Builder	Service area, past customer lists, unsold estimates, review promoters, storm-hit neighborhoods, property manager segments, suppression lists.	Audience exports/syncs only permitted contacts with consent and suppression filtering.
Budget + Pacing Controls	Daily/weekly/monthly spend limits, campaign flight dates, pause rules, anomaly detection, cost-per-lead thresholds.	Tenant can set hard caps and alert thresholds before campaign activation.
Unified Lead Inbox	All inbound leads and conversations by source, AI triage, duplicate merge, appointment status, and rep assignment.	No lead remains unassigned; SLA breach creates task/alert.
Conversion + Offline Event Sync	Send appointment scheduled, showed, estimate sent, won, job completed, and value events back to supported platforms.	Events deduped; consent and platform terms respected; failed syncs retry and log.
Attribution Dashboard	Cost, leads, CPL, appointments, show rate, close rate, revenue, premium mix, reviews, ROAS by source/campaign/creative/playbook.	Source-to-close reporting works across ad sources and nurture flows.
Compliance and Approval Center	Creative approval, consent text approval, platform policy flags, review/testimonial disclosure checks, AI audit queue.	Unapproved campaign cannot publish; risky message cannot send.

5. Ad-to-Nurture Architecture

Campaign Blueprint	Platform Ad / Lead Form	Lead Ingest Adapter	Consent + Identity Resolution	AI Triage	Playbook + Scheduling	Rep Brief + Attribution
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Step	System action	Failure fallback
Campaign created/selected	Admin chooses blueprint, source, budget, service area, offer, form, and nurture playbook.	If API publishing unavailable, generate platform-ready instructions and manual setup checklist.
Lead arrives	Validate signature/key/token where supported, store raw payload, normalize fields, attach attribution IDs.	Dead-letter queue, admin alert, and retry policy.
Consent proof	Store form text, policy URL, source, timestamp, channel/purpose, and user-submitted fields.	If missing or ambiguous, restrict to allowed transactional/manual follow-up only.
Identity match	Find or create contact; dedupe by phone/email/address/source lead ID.	Low confidence match creates review task.
AI triage	Determine service type, urgency, role, intent, next best action, and lead quality.	Low confidence asks one clarifying question or creates rep task.
Nurture launch	Start mapped playbook: scheduling, education, reminders, upsell prep, post-visit follow-up.	If no mapping, use default inbound lead playbook and alert admin.
Conversion sync	Send permitted source events back to platform: booked, showed, estimate, won, revenue.	Dedup key prevents duplicate conversions; failures queued.

6. AI Use Cases and Guardrails

AI use case	Example	Guardrail
Campaign brief generator	Admin enters "storm inspection campaign for hail-hit ZIPs" and AI drafts objective, audience notes, CTA, ad copy, form fields, and nurture path.	Requires admin approval; only uses tenant-approved claims and offers.
Ad creative variants	Generate 5 headline/body variations for Facebook, Google, LinkedIn, Reddit, and Nextdoor tone differences.	No before/after exaggeration; no unverified discounts; platform-specific character and policy checks.
Lead form question optimizer	Suggests 2-4 qualifying questions such as owner/tenant, service urgency, property address, insurance status.	Do not request sensitive data; do not over-friction the form.
Audience suggestion	Suggest past customer maintenance retargeting, unsold estimate retargeting, storm-event neighborhoods, commercial property manager list.	No sensitive-attribute targeting; suppression and consent filters mandatory.
Budget anomaly detection	Flags CPL spike, lead quality drop, abnormal duplicate rate, or source-to-appointment decline.	AI recommends pause/review; tenant or approved automation rule executes change.
Comment/DM triage	Classifies inbound comments/messages as lead, complaint, spam, referral, or support.	Do not auto-delete criticism except tenant policy; route complaints to human.
Next best nurture selection	Maps a Google roof repair lead to emergency leak path or a LinkedIn facilities lead to commercial bid path.	Playbook rules override AI when deterministic.
Rep/campaign learning loop	Summarizes which ad creative produces customers who show, close, and buy add-ons.	Analytics must be based on CRM events, not impression-level assumptions.
Compliance reviewer	Flags missing opt-out, risky guarantee, undisclosed incentive, deceptive scarcity, or unsupported insurance claim.	Blocks publish/send until resolved.

6.1 Responsible copy principles by platform

Platform	Tone and offer guidance
Facebook/Instagram	Local, visual, simple offer, fast callback/schedule. Good for storm inspection, before/after education, homeowner checklists. Avoid panic/fear language after storms.
Google	Intent matching. Align ad text and landing/lead form to exact search need: roof leak, roof replacement, storm damage inspection, commercial roofing bid.
LinkedIn	Professional and proof-driven. Focus property managers, owners, facility managers, associations, builders, and commercial maintenance.
Reddit	Value-first, specific, less polished sales tone. Offer checklist, calculator, AMA-style education, or transparent expert answer. Avoid corporate hype.
WhatsApp	Conversational, short, service-oriented. Use approved templates for outbound and shift to human for complex issues.
Nextdoor	Neighborhood, hyperlocal, trust and reputation focused. Use credibility, service area, reviews, and practical advice. Avoid spammy automation or scraping.

7. Data Model and API Spec

7.1 Data model

Entity	Purpose	Fields
ad_accounts	Connected platform accounts.	tenant_id, platform, external_account_id, name, status, token_ref, scopes_json, last_sync_at.
ad_campaigns	Internal campaign records.	tenant_id, platform, external_campaign_id, name, objective, status, budget, start_at, end_at, service_type, playbook_id.
ad_creatives	Creative assets and copy versions.	campaign_id, platform, headline, body, description, media_asset_id, ai_generated, approval_status, policy_status.
lead_forms	Lead form definitions.	campaign_id, platform_form_id, title, fields_json, custom_questions_json, consent_text, privacy_policy_url, thank_you_json, status.
field_mappings	Platform field to CRM field mapping.	lead_form_id, source_field, target_field, transform_rule, required, validation_rule.
ad_leads	Inbound ad leads.	tenant_id, platform, external_lead_id, campaign_id, ad_id, form_id, contact_id, opportunity_id, raw_payload_id, status, received_at.
utm_links	Trackable URLs.	campaign_id, source, medium, campaign, content, term, destination_url, short_url, created_at.
audience_segments	Reusable audiences.	tenant_id, name, segment_type, filters_json, consent_filter, suppression_filter, last_count.
conversion_events	Events sent back to ad platforms.	tenant_id, platform, event_name, entity_type, entity_id, value, currency, dedup_key, sync_status, synced_at.
campaign_analytics_daily	Materialized reporting table.	date, tenant_id, platform, campaign_id, spend, impressions, clicks, leads, appointments, shows, wins, revenue.
creative_reviews	Approval and compliance audit.	creative_id, reviewer_user_id, status, comments, policy_flags_json, approved_at.

7.2 API endpoints

Endpoint	Method	Purpose
/v1/ad-accounts/connect/{platform}	POST	Start OAuth or credential connection for a platform.
/v1/ad-accounts/{id}/health	GET	Return token, scope, webhook, permission, and last sync status.
/v1/campaign-blueprints	GET	Return predefined roofing/construction campaign templates.
/v1/ad-campaigns	POST	Create internal campaign draft and optional external platform draft.
/v1/ad-campaigns/{id}/publish	POST	Publish to supported platform or mark manual-publish checklist complete.
/v1/ad-creatives/ai-draft	POST	Generate creative variants from approved knowledge, objective, and platform.
/v1/lead-forms	POST	Create internal lead form definition and platform mapping.
/v1/lead-ingest/{platform}	POST	Receive platform webhook/lead payload.
/v1/ad-to-nurture-rules	POST	Create campaign/form/source to playbook mapping.
/v1/audience-segments/preview	POST	Return estimated audience count after consent/suppression filters.
/v1/conversion-events/sync	POST	Queue events for platform conversion/offline event sync.
/v1/analytics/ad-performance	GET	Return spend-to-revenue metrics by source/campaign/ad/form/playbook.

8. UX / Admin Screens

Screen	Primary components
Marketing Hub Home	KPIs, campaign status, leads by source, SLA breaches, recommended actions, source-to-close funnel.
Connected Accounts	Platform cards, connect/disconnect, token status, permission status, last sync, webhook test button.
Campaign Builder	Objective, platform, service type, geography, budget, schedule, offer, creative, form, playbook mapping, approval workflow.
Creative Studio	AI draft, variants by platform, media library, compliance flags, version history, approve/publish.
Lead Form Mapper	Platform fields, custom questions, required flags, consent text, privacy URL, CRM field mapping, thank-you CTA.
Ad-to-Nurture Rules	If platform/source/campaign/form/service then playbook/rep/education/scheduling behavior.
Unified Lead Inbox	New leads, duplicate warnings, AI triage, source details, appointment status, owner assignment, one-click schedule.
Audience Segments	Saved filters, consent count, suppression count, export/sync status, last updated, refresh.
Attribution Dashboard	Spend, CPL, cost per appointment, show rate, close rate, revenue, premium mix, reviews, ROAS.
Compliance Center	Pending creative approvals, blocked claims, consent text versions, review disclosure issues, AI audit.

9. Campaign Recipes and Examples

9.1 Campaign blueprint examples

Blueprint	Best channels	Lead form questions	Mapped nurture
Storm inspection response	Facebook/Instagram, Google, Nextdoor	Address, storm date if known, active leak?, homeowner/tenant, preferred contact time.	Social Lead to Appointment -> Storm Inspection Appointment Nurture -> Insurance Education if relevant.
Retail roof replacement	Google, Facebook/Instagram, Nextdoor	Roof age, leak/aging/planned upgrade, timeline, financing interest.	Retail Replacement Nurture -> Upgrade Education -> Appointment Reminder.
Emergency leak/tarping	Google, Facebook/Instagram, WhatsApp	Active leak?, safe photo upload, address, urgency, best callback number.	Emergency Dispatch Nurture -> Human escalation within 10 minutes.
Commercial / property manager bid	LinkedIn, Google, Reddit	Company, role, property type, square footage if known, site access, decision timeline.	Commercial Bid Nurture -> Decision-maker Confirmation -> Capability Statement.
Unsold estimate retargeting	Facebook/Instagram, Google, Reddit, LinkedIn for commercial	No new form required; use CRM audience.	Unsold Estimate Warm/Cold Nurture -> Financing or Options Compare.
Review/referral flywheel	Facebook/Instagram, Nextdoor, email/SMS/WhatsApp	Referral landing page or review CTA.	Completion Promoter Path -> Review -> Referral Offer if allowed.
Seasonal maintenance/reactivation	Nextdoor, Facebook, Google, WhatsApp/email	Past customer check-in, inspection request, warranty check.	Reactivation -> Annual Inspection -> Storm Trigger Retarget.

9.2 Example campaign: Facebook/Instagram storm ad

Field	Example
Objective	Lead generation / instant form.
Audience	Tenant service area ZIPs; storm-affected area segment; past customer suppression; frequency cap.
Ad copy draft	"Recent hail or wind in {{City}}? A roof inspection can document visible damage, ventilation concerns, and repair/replacement options. Request an inspection window."
Form questions	Name, phone, email, property address, active leak?, homeowner/tenant/property manager, preferred appointment window.
Consent text	Tenant-approved SMS/email consent language, privacy policy URL, and opt-out instruction.
Thank-you CTA	"We received your request. Choose an appointment window or watch for a scheduling text."
Mapped playbook	Social Lead to Appointment + Storm Inspection Appointment Nurture.
AI first response	Offer two real slots, ask one clarifying question if active leak/role is unknown.
Sales prep	Send storm checklist, inspection expectations, Class 4/composite education if engaged, and rep brief before arrival.

9.3 Example campaign: LinkedIn commercial roofing

Field	Example
Objective	Lead generation for property manager / facilities / owner bid.
Audience	Facilities managers, property managers, real estate operators, HOAs, builders, regional commercial property owners.
Ad copy draft	"Need a commercial roof assessment or bid package? Request a site review and receive a decision-maker checklist before the meeting."
Form questions	Company, role, property address, property type, number of buildings, decision timeline, site access requirements.
Mapped playbook	Commercial / Property Manager Bid Nurture.
AI follow-up	Confirm decision-maker, request site access details, send capability statement and COI request.
Sales prep	Rep brief highlights property type, decision timeline, stakeholder role, and required documents.

9.4 Example campaign: Reddit value-first lead gen

Field	Example
Objective	Lead generation or traffic to checklist/calculator depending on account eligibility.
Offer	Free "Roof inspection prep checklist" or "What to ask after a hail storm" guide.
Tone	Specific, direct, non-hype. Explain what the checklist covers and who it helps.
Form questions	Email, ZIP, service concern, homeowner/property manager, permission to follow up.
Mapped playbook	Low-pressure education nurture first; appointment CTA after value delivery.
AI guardrail	Do not masquerade as organic community posting; keep ads clearly ads; no scraping or undisclosed outreach.

10. Attribution, Reporting, and Optimization

The engine must report the metrics that matter to a roofing/construction tenant. Leads alone are not enough. The dashboard should expose source-to-close economics and customer readiness.

Metric	Definition
Spend	Ad spend by platform/campaign/ad/creative/date.
Lead volume and CPL	Raw leads, qualified leads, duplicate/spam rate, and cost per qualified lead.
Speed-to-lead	Seconds from platform lead received to first permitted outbound contact.
Appointment scheduled rate	Appointments scheduled divided by valid leads.
Show rate	Appointments completed divided by scheduled appointments.
Estimate rate	Estimates sent divided by completed appointments.
Close rate	Won jobs divided by estimates or appointments depending on tenant setting.
Revenue and ROAS	Won job value attributed to source/campaign/ad/form/playbook.
Premium mix	Percentage of won jobs with premium packages or add-on services.
Education engagement	Clicks/views/replies on prep, upgrade, financing, and warranty content.
AI quality	AI containment, handoffs, blocked responses, human corrections, customer sentiment.
Review/referral lift	Reviews, referral leads, and repeat/reactivation revenue by source.

10.1 Conversion event mapping

CRM event	Platform conversion event category	Dedup key
LeadCreated	Lead	platform + external_lead_id or contact_id + campaign_id + timestamp bucket
AppointmentScheduled	Schedule / QualifiedLead	opportunity_id + appointment_id
AppointmentCompleted	Show / QualifiedAppointment	appointment_id + completed_at
EstimateSent	SubmitApplication / QualifiedLead equivalent depending platform	estimate_id
EstimateAccepted / JobWon	Purchase / ClosedWon	opportunity_id + won_at
PaymentReceived	PurchaseValue	invoice_id or payment_id
ReviewSubmitted	LeadQuality / CustomerFeedback internal event; external sync only if platform terms allow.	review_id

11. Post-Build Review: Failure Risks and Fixes

Risk	Failure mode	Mitigation
Overpromising platform automation	Team sells full campaign management where API access is limited or partner approval is pending.	Feature flags by platform capability: ingest-only, report-only, conversion-sync, draft-builder, full-publish. UI must show capability status.
Lost leads	Webhook fails or token expires; lead stays inside platform.	Health checks, retry queues, dead-letter queues, webhook test tools, token expiration alerts, manual import fallback.
Consent noncompliance	Ad form lacks valid SMS/email consent proof or proof is not stored.	Consent proof required before marketing automation; locked form text templates; counsel-reviewed defaults.
Bad lead quality	Low-friction forms create low-intent leads and rep fatigue.	Add qualifying questions, AI quality score, duplicate detection, and campaign feedback by show/close rate.
AI policy failure	AI drafts fear-based storm copy or unsupported insurance claims.	Compliance reviewer, blocked claims list, approved knowledge only, human approval before publish.
Wrong playbook mapping	Commercial lead receives homeowner roof messages.	Required source/form/service mapping; AI triage confidence; admin preview and test lead.
Attribution pollution	UTMs lost, click IDs overwritten, duplicate conversions sent.	Immutable ad_attribution records, dedup keys, first/last/multi-touch models, event replay tests.
Platform account suspension	Aggressive ad language, review misuse, data misuse, scraping, or policy violation.	Policy center, approval workflows, no scraping, platform-specific policy checklists, audit logs.
Tenant data leakage	Agency user or tenant sees another tenant account/lead/audience.	Strict tenant isolation, RBAC, scoped tokens, row-level security, audit logs.
Operational bottleneck	Leads schedule appointments faster than estimators can handle.	Calendar capacity rules, budget pacing tied to availability, automatic campaign pause when capacity threshold reached.
Misaligned optimization	Campaign optimizes for cheap leads instead of profitable jobs.	Default optimization dashboard ranks by qualified appointments, shows, revenue, premium mix, and ROAS, not lead count alone.
Review/testimonial risk	System uses customer reviews in ads without proper disclosure or permission.	Store review usage permission and disclosure status; follow FTC/platform guidance; block unapproved review creative.

12. Offshore Development Backlog

Epic	Story	Build	Acceptance criteria
A. Platform Foundation	A1 Connected Accounts	OAuth/credentials, scopes, token storage refs, status pages, disconnect.	Can connect at least one sandbox/test account; token failure displays alert.
A. Platform Foundation	A2 Connector capability matrix	Backend table and UI showing platform capabilities per tenant.	UI differentiates ingest-only/report-only/full publish.
B. Campaign Builder	B1 Blueprint library	Create campaign templates for storm, retail, emergency, commercial, reactivation, review/referral.	Admin can clone blueprint into campaign draft.
B. Campaign Builder	B2 Creative Studio	AI draft, manual edit, media attach, platform variants, approval status.	Unapproved creative cannot publish or be exported as final.
B. Campaign Builder	B3 Lead form builder	Fields, custom questions, consent text, privacy URL, thank-you CTA, mapping.	Test lead maps correctly into CRM fields.
C. Lead Ingest	C1 Webhook receiver	Generic secure receiver with platform-specific validation and idempotency.	Duplicate external lead ID creates one CRM lead.
C. Lead Ingest	C2 Normalization and dedupe	Normalize field names, phone/email/address, match contacts/opportunities.	Low confidence duplicates enter review queue.
D. Ad-to-Nurture	D1 Routing rules	Map platform/campaign/form/service to playbook, rep, education track.	New lead starts correct playbook within SLA.
D. Ad-to-Nurture	D2 AI triage integration	Classify service, urgency, role, and quality score.	AI reasons visible; low confidence creates task.
E. Audience + Suppression	E1 Segment builder	Filter CRM contacts by stage, source, service, last job, estimates, geography, consent.	Preview count respects opt-outs and suppressions.
E. Audience + Suppression	E2 Export/sync framework	Export CSV and queue platform audience sync where supported.	Suppression list always included for retargeting campaigns.
F. Conversion Sync	F1 Conversion event queue	Queue, dedup, retry, and log conversion events for platforms.	No duplicate conversion with same dedup key.
F. Conversion Sync	F2 Offline value mapping	Map CRM revenue and job status to platform conversions where supported.	Won job value syncs only after allowed event and tenant approval.
G. Reporting	G1 Spend/import reporting	Pull or import spend/impressions/clicks/leads by platform/campaign/day.	Daily reporting table populated and dashboard loads under 3 seconds for typical tenant.
G. Reporting	G2 Source-to-close dashboard	Join ad metrics, leads, nurture, appointments, estimates, jobs, reviews.	Filters by source, campaign, creative, rep, service type, and date.
H. Compliance	H1 Approval workflow	Creative, form, consent text, AI copy, and review/testimonial approvals.	Blocked campaign cannot publish until approvals complete.
H. Compliance	H2 Audit export	Export campaign, consent, message, AI, and conversion audit logs.	Admin can export audit package for a lead/campaign.

13. Release Plan and Source Notes

Phase	Build scope	Exit criteria
Phase 1 - Lead capture and mapping	Connected accounts health, lead ingest, field mapping, consent proof, ad-to-nurture rules for Meta/Google/LinkedIn first.	A test lead from each enabled platform creates a CRM lead, consent proof, attribution record, and playbook instance.
Phase 2 - Creative and campaign workflow	Blueprints, AI creative draft, approval workflow, manual publish checklist, campaign status tracking.	Tenant can create a complete campaign packet and publish manually or via supported API path.
Phase 3 - Conversion and analytics	Conversion event queue, reporting imports/API sync, source-to-close dashboard.	Dashboard shows spend-to-revenue and appointment-quality metrics.
Phase 4 - Optimization and automation	Budget pacing, anomaly detection, audience sync, controlled campaign/pause rules.	Automated actions are behind tenant-approved rules and audit logs.

Source notes

Primary source types checked for this spec include official Google Ads lead form webhook guidance, LinkedIn Marketing API / Lead Sync guidance, Reddit Ads API / Lead Generation Ads / Conversions API guidance, Nextdoor developer and ads API resources, FTC/FCC compliance guidance, and the existing Lynked Up Pro Nurture Engine baseline. Platform scope must be verified during implementation.

- Google for Developers: Lead Form Webhook lets advertisers send incoming lead data from Google lead form assets to a configured CRM endpoint with a URL and key.
- LinkedIn Marketing API Program and Lead Sync documentation cover campaign/reporting APIs and lead syncing for Lead Gen Forms.
- Reddit Ads Help documents Ads API campaign management, Lead Generation Ads, Lead Ads Zapier integration, Lead Generation Ads policy, and Conversions API.
- Nextdoor Developer resources describe advertising and content APIs; Nextdoor Ads API / Conversion API access may require account eligibility.
- WhatsApp Business Platform documentation and Meta Blueprint resources cover templates, webhooks, and business messaging controls.
- FCC and FTC sources should be reviewed for TCPA opt-out/consent, CAN-SPAM, and reviews/testimonial disclosure rules.
- Meta developer documentation for Lead Ads, Marketing API, webhooks, Conversions API, and WhatsApp should be verified directly by engineering during connector setup.