Minsky™CRM

AI-Enabled Enterprise CRM Platform — One Subscription, Your Choice of Edition

Overview

Minsky™CRM is an enterprise-grade, AI-powered CRM platform engineered to unify sales, pipeline management, quoting, proposals, scheduling, reporting, and governance into a single intelligent workspace. Coverage spans the full sales lifecycle — from a Discovery Form that captures and AI-scores initial prospect interest, through Accounts, Contacts, Opportunities, Quotes and Proposals, to closed-won and post-sale project delivery. Built on a modern tri-layer architecture (Angular, FastAPI, MySQL) with a dedicated database for every client.

Built for the AI-first, data-sovereign, user-friendly, and cost-sensitive enterprise — offering complete flexibility, fewer restrictions, lower cost, and modern AI automation.

One Subscription. Two Editions. Your Choice.

Minsky™CRM is now offered as a **single subscription**: each client simply selects the edition that fits its sales process — the core Minsky™CRM or the full-revenue-cycle Minsky™CRM Plus — on the same platform, with the same embedded AI and the same enterprise security.

THE CORE AI CRM

Minsky™CRM

Everything a sales team needs in one workspace: capture and AI-score prospects, manage accounts, contacts and opportunities, build quotes from your product catalog, and generate AI proposals — with Ask Minsky™ answering questions in plain English.

- ✔ Discovery Form with AI Minsky™ Score
- ✔ Quotes, product catalog & AI proposals
- ✔ Outlook mail & calendar sync
- ✔ Reports, Taskbar & My Vault

EVERYTHING IN MINSKY™CRM, AND MORE

Minsky™CRM Plus

All of Minsky™CRM, plus the tools to manage the full revenue cycle: Leads with assignment rules, an AI-assisted RFP Builder, Vendors, Completed Projects for post-sale delivery, manager approval queues, and smarter documents and tasks.

- ✔ Leads with automatic assignment rules
- ✔ AI RFP Builder, Vendors & Completed Projects
- ✔ Pending My Approval queues
- ✔ Vault versioning & one-click task actions

Platform Navigation & Modules

A single, unified workspace covering every stage of the sales lifecycle (modules marked + are included with the Minsky™CRM Plus edition):

Dashboard	Discovery Form	Leads +	Accounts	Opportunities	Quotes / Proposals	RFP Builder +
Contacts	Vendors +	Completed Projects +	Calendar	Outlook	Reports	Data Import
My Vault	Taskbar	Product Catalog	Team Reassignment	Users	Configuration	Ask Minsky™

AI in Action

Proposal & Quote Creation

Build quotes from the product catalog with line discounts and tax, export a branded quote PDF, and generate an AI-drafted proposal in Word or PDF — auto-populated from deal data.

Ask Minsky™

Ask in plain English — 'What's my pipeline by stage?' — and get answers from your live CRM data in seconds, limited to the records you are allowed to see.

AI-Drafted Intro Emails

Personalized introduction and follow-up emails generated from account, contact, and company research context — ready to review and send.

AI Capabilities

AI is embedded natively across both editions of Minsky™CRM — not a bolted-on add-on tier.

- ***Ask Minsky™*** – conversational AI assistant that answers plain-English questions from live CRM data, scoped to each user's access, with saved conversation history
- ***Minsky™ Score*** – AI scoring of Discovery prospects from 0 to 100, banded Hot, Warm, or Cold, so reps focus on the strongest opportunities
- ***AI-Generated Proposals*** – branded proposals drafted from opportunity and discovery data, delivered in Word and PDF
- ***AI Company Research (KYC)*** – AI-researched company context and insights on contacts, using web company signals to personalize outreach
- ***AI Pain Points & Follow-Ups*** – AI-identified pain points per opportunity plus drafted follow-up emails (pain points, how we help, first meeting)
- ***AI RFP Builder (Plus)*** – RFP documents generated from structured form fields, with AI-drafted vendor emails and a manager approval step

User Journeys

- **Sales Reps (AE)** – discovery capture with Minsky™ Score, opportunities, quotes, proposals, Taskbar agenda, monthly metrics and quota bars
- **Managers & Senior Managers** – 'Viewing: All Team' pipeline view, reports and rep leaderboard, team reassignment, and an optional daily manager digest email
- **Client Admin** – user management, custom roles and permissions, Configuration, drag-and-drop layouts, product catalog, and data import
- **Approvers (Plus)** – 'Pending My Approval' queues for quotes, proposals, and RFPs before anything reaches the customer
- **Viewers** – read-only access for stakeholders who need visibility without editing rights
- **Every User** – Ask Minsky™, Calendar with Outlook sync, My Vault documents, and notifications in one workspace

Security & Governance

Enterprise-grade security and governance are built into every layer of Minsky™CRM — identical in both editions.

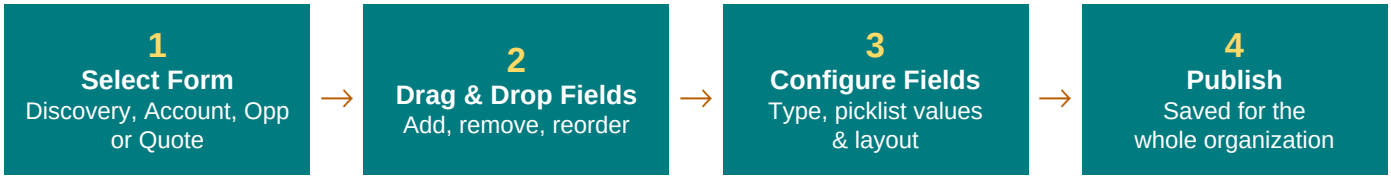
- **Role-Based Access Control** – View / Create / Edit / Delete permissions per page and role, custom roles, and hierarchical record visibility (rep, manager, senior manager)
- **JWT Authentication** – with multi-factor authentication (MFA) by email one-time code, and authenticator-app codes for platform administrators
- **Encryption** – bcrypt password hashing and encrypted storage of connected-account (OAuth) tokens
- **Session Protection** – idle-session timeout, admin account lockout, and rate limiting on public endpoints
- **Security Audit Logs** – sign-ins, blocked uploads, and AI actions tracked
- **Tenant Isolation** – a dedicated database for every client
- **AI Safeguards** – personal data redacted before AI calls, prompt-injection protection, and an AI on/off control per client
- **Safe Uploads** – every document sanitized (active content removed) and checked before it is stored

Integration Ecosystem

Minsky™CRM connects to Microsoft 365 out of the box — Outlook mail sync and send, Outlook calendar sync, and Microsoft Teams meeting links — plus Google Meet links, calendar (.ics) invites, and Gmail compose with automatic activity logging. Data Import brings in CSV, Excel, TXT, and PDF files with automatic column matching and duplicate checks.

No-Code Form Builder

Client Admins customize record forms and the Discovery Form in four steps — no code, no vendor ticket:



Choose Your Edition — Minsky™CRM vs. Minsky™CRM Plus

One subscription covers both options. Features marked only in the Plus column are exclusive to the Minsky™CRM Plus edition.

Capability	Minsky™CRM	Minsky™CRM Plus
Sales Dashboard, Discovery Form & Minsky™ Score — AI prospect scoring	✔	✔
Accounts, Contacts & Opportunities — Kanban boards and account hierarchy	✔	✔
Quotes / Proposals & Product Catalog — discounts, tax, branded quote PDF	✔	✔
Ask Minsky™, AI Proposals & AI Company Research — AI-drafted emails	✔	✔
Outlook, Calendar, Taskbar, Reports & My Vault — Teams and Meet links	✔	✔
Team View, Form Builder, Data Import, Roles & MFA — tenant isolation	✔	✔
Leads Module — automatic assignment rules	—	✔
AI RFP Builder — RFP documents and AI-drafted vendor emails	—	✔
Vendors & Completed Projects — post-sale project tracking	—	✔
Pending My Approval Queues — quotes, proposals, and RFPs	—	✔
Vault Versioning & Send to Customer — share versions directly	—	✔
One-Click Task Actions — quote, proposal, or meeting from a task	—	✔

Role-Based Access

- **Sales Reps & Managers** – Dashboard with Pipeline Value, Closed Won, Activities Today, and upcoming activities (Active Leads in Plus)
- **Viewing: All Team** – managers see the full team pipeline; reps see their own
- **Pending My Approval (Plus)** – manager approval queues for quotes, proposals, and RFPs
- **Client Admin** – everything above, plus org-wide Users and Roles & Permissions management
- **Data Import** – bulk import with column matching and duplicate handling
- **Form Builder** – drag-and-drop layouts and custom fields platform-wide, with no code required

Why Enterprises Choose Minsky™CRM

1–100+ Users on one flexible platform — no per-seat lock-in	**1 Subscription** Choose Minsky™CRM or Minsky™CRM Plus	**$0 Extra** AI, Ask Minsky™, CPQ quotes & AI proposals — all included	**100%** Data control — on-prem or sovereign cloud options

How a Deal Flows — From Contact or Lead to Opportunity

For readers new to the application: how a prospect becomes an Opportunity in each edition.

Minsky™CRM Starts at the Contact	1 **Add or import** a Contact and its Account	2 **Research** the company (KYC) and send an AI intro email	3 **Log the call** and book the first meeting	4 **Complete the meeting** — the Opportunity is created	5 **Qualify** with the Discovery Form and Minsky™ Score	6 **Quote / Proposal**, then Closed Won or Lost
Minsky™CRM Plus Starts at a Lead or a Contact	1 **Capture a Lead** — auto-assigned by rules	2 **Work the lead** — calls and the first meeting	3 **Convert** — Account, Contact and Opportunity in one step	4 **Qualify** with the Discovery Form and Minsky™ Score	5 **Quote / Proposal** with manager approval	6 **Closed Won** — track delivery in Completed Projects

In Minsky™CRM Plus, a prospect you already know can also start as a Contact and follow the Minsky™CRM path.

Minsky™CRM vs. Salesforce.com

Capability	Minsky™CRM / Minsky™CRM Plus	Salesforce.com
User Licensing	One subscription, either edition; 1–100+ users	$3K–$6K per user/year; escalates at every tier
Conversational AI Assistant	Ask Minsky™ – included in both editions	Einstein Copilot – separate license
CPQ (Configure Price Quote)	Catalog & quotes integrated; no extra license	Requires Salesforce CPQ add-on
Form / Page Customization	Drag-and-drop, no-code, self-service	Requires admin/dev configuration
AI-Generated Proposals / RFPs	AI proposals built in; RFP Builder in Plus	Not native – requires AppExchange
Open Stack / No Lock-In	Open architecture, customer-controlled	Proprietary platform ecosystem
Deployment Model	Cloud, On-Prem, or Sovereign Cloud	Public multi-tenant cloud only
Data Residency / Sovereignty	Full control – on-prem & sovereign cloud	Limited to Salesforce-hosted regions
Implementation Timeline	Typically live in weeks	Often 3–6+ months with an SI partner
Implementation Partner	AI Labs direct; full accountability	Large SI ecosystem; variable quality
Roadmap Influence	Customer-funded enhancements go to core	Limited; governed by Salesforce roadmap
Source Code Access	Available (Full Solution option)	Not available

Subscription: One Minsky™CRM subscription — select the Minsky™CRM or Minsky™CRM Plus edition.

Deployment Options: Subscription Multitenant Cloud | White-Label on Client Server | On-Prem Servers | Sovereign Cloud Servers | Full Solution with Source Code

See Minsky™CRM and Minsky™CRM Plus in Action

One subscription, your choice of edition. Schedule a live walkthrough and discover enterprise-grade AI CRM at a fraction of the total cost of ownership.

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