BLANK: complete and review before buying

CRM workflow comparison worksheet

Edition: BLANK. Version WB-CRM-2026-11-06-v1. Guide: https://worksbetter.ai/crm-for-small-business/

Instructions

Use this worksheet to compare two configurations on the same enquiry, quote, job and invoice. It is a manual evidence register: it returns no formula score, and it has no weights, no default vendor, no numeric threshold and no recommendation engine. The Excel edition only counts the states for each candidate.

Complete the 12 rows for candidate A and the same 12 rows for candidate B. A Pass needs evidence of the expected result. Not applicable, explained needs the reason and acceptance by the decision owner. Every other row stays open until you resolve it. Never overwrite an unknown with zero.

Write references and file locations, not copied personal contact details. Keep money and maintenance hours in separate fields. Do not add unlike currencies or mix tax bases.

The decision page counts the states for each candidate, then records Hold, Retest, Keep existing setup or Proceed to commercial review, with reasons. These labels belong to this worksheet; they are not vendor or regulatory statuses.

Works Better builds connected workflows. This guide is not an independent product review.

General information only. This is not tax agent or legal advice. Ask your accountant about accounting treatment and your adviser about privacy and contracts.

Opening fields

Field	Entry
Candidate A	
Candidate B	
Preparation date	
Workflow boundary	
Existing job and accounting products	
Trial owner	
Accounting reviewer	
Decision owner	
Source-record locations	

Reference records

BLANK: complete and review before buying. One enquiry followed to payment status. Keep references and file locations only, not personal contact details.

Field	Entry
Enquiry	
Existing customer	
Quote revision 1	
Quote revision 2	
Job	
Invoice	
Payment	
Remaining balance	
Retry	
Tax basis	

Candidate A | R01 Product and connection scope | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R01
requirement	Product and connection scope
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Exact CRM configuration, accounting product/version and connector publisher; dated vendor evidence for the required record types. Unconfirmed scope stays open.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R02 Capture one enquiry | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R02
requirement	Capture one enquiry
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	One enquiry reference, its source, a responsible role and a next-action date appear once. Reopen the saved record.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R03 Match the existing customer | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R03
requirement	Match the existing customer
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	The repeat enquiry links to the intended existing customer ID; no second customer is silently created. Preserve both source and destination IDs. The HubSpot Data Sync help (read 6 November 2026) names a different email address as the most common reason an invoice contact is not found in Xero: record the email used.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R04 Keep the quote and revision | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R04
requirement	Keep the quote and revision
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Current quote ID, accepted revision, value and acceptance evidence remain linked to the enquiry. An obsolete revision is visibly superseded.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R05 Create the job after approval | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R05
requirement	Create the job after approval
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	The approved quote links to one job. Record who authorises the transition. A pending quote does not create an authorised job.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R06 Reconcile the invoice | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R06
requirement	Reconcile the invoice
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Customer, job, invoice reference and total agree with the approved revision. The record shows its actual approval state and the person who decides release. The HubSpot Data Sync help (read 6 November 2026) says invoices must be in Open state to sync to Xero: record the invoice state.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R07 Return payment status | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R07
requirement	Return payment status
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	The recorded payment and outstanding balance reconcile to the ledger evidence. Quote/deal value is not treated as a cash receipt.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R08 Retry without duplication | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R08
requirement	Retry without duplication
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Repeat the same event reference. One intended job or invoice remains, or a visible hold prevents another write. Retain the retry log.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R09 Change the scope safely | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R09
requirement	Change the scope safely
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	A changed quote has a new revision and approval evidence. The old revision does not overwrite the approved invoice silently.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R10 Recover a failed connection | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R10
requirement	Recover a failed connection
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Disconnect the trial connection. A named role receives an alert, can identify pending work and uses the recorded manual recovery route.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R11 Verify access, location and exit | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R11
requirement	Verify access, location and exit
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Confirm the hosting information and user access for the account; export and reopen the required customer, deal, note and attachment records. Record omissions separately.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate A | R12 Confirm commercial and maintenance terms | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	A
requirement_id	R12
requirement	Confirm commercial and maintenance terms
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Dated written quote records currency, GST/tax wording, term, seats, usage, connector charges, setup and support. Record maintenance hours separately from money, and who covers for the named maintainer.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R01 Product and connection scope | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R01
requirement	Product and connection scope
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Exact CRM configuration, accounting product/version and connector publisher; dated vendor evidence for the required record types. Unconfirmed scope stays open.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R02 Capture one enquiry | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R02
requirement	Capture one enquiry
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	One enquiry reference, its source, a responsible role and a next-action date appear once. Reopen the saved record.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R03 Match the existing customer | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R03
requirement	Match the existing customer
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	The repeat enquiry links to the intended existing customer ID; no second customer is silently created. Preserve both source and destination IDs. The HubSpot Data Sync help (read 6 November 2026) names a different email address as the most common reason an invoice contact is not found in Xero: record the email used.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R04 Keep the quote and revision | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R04
requirement	Keep the quote and revision
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Current quote ID, accepted revision, value and acceptance evidence remain linked to the enquiry. An obsolete revision is visibly superseded.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R05 Create the job after approval | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R05
requirement	Create the job after approval
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	The approved quote links to one job. Record who authorises the transition. A pending quote does not create an authorised job.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R06 Reconcile the invoice | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R06
requirement	Reconcile the invoice
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	Customer, job, invoice reference and total agree with the approved revision. The record shows its actual approval state and the person who decides release. The HubSpot Data Sync help (read 6 November 2026) says invoices must be in Open state to sync to Xero: record the invoice state.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Candidate B | R07 Return payment status | BLANK | WB-CRM-2026-11-06-v1

Field	Entry
edition	BLANK
candidate_id	B
requirement_id	R07
requirement	Return payment status
configuration	
record_owner	
source_reference	
destination_reference	
direction	
expected_result	The recorded payment and outstanding balance reconcile to the ledger evidence. Quote/deal value is not treated as a cash receipt.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

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Field	Entry
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record_owner	
source_reference	
destination_reference	
direction	
expected_result	Repeat the same event reference. One intended job or invoice remains, or a visible hold prevents another write. Retain the retry log.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

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record_owner	
source_reference	
destination_reference	
direction	
expected_result	A changed quote has a new revision and approval evidence. The old revision does not overwrite the approved invoice silently.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

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Field	Entry
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destination_reference	
direction	
expected_result	Disconnect the trial connection. A named role receives an alert, can identify pending work and uses the recorded manual recovery route.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

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source_reference	
destination_reference	
direction	
expected_result	Confirm the hosting information and user access for the account; export and reopen the required customer, deal, note and attachment records. Record omissions separately.
observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

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Field	Entry
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destination_reference	
direction	
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observed_result	
state	Not run
evidence_location	
decision_owner	
next_action_and_date	

Decision page

BLANK: complete and review before buying. Count the states for each candidate, then record the decision. Money fields stay blank or Not confirmed until a dated written quote confirms them. Do not add unlike currencies or mix tax bases.

Candidate A

Field	Entry
Pass	
Fail	
Not run	
Explained exclusions	
Total of the four (must be 12)	
Unresolved evidence	
Once-only cash cost	
Recurring cash cost and period	
Maintenance hours and period	
Decision	Hold / Retest / Keep existing setup / Proceed to commercial review (circle one)
Reason	
Accountable role	
Decision date	
Next action	

Candidate B

Field	Entry
Pass	
Fail	
Not run	
Explained exclusions	
Total of the four (must be 12)	
Unresolved evidence	
Once-only cash cost	
Recurring cash cost and period	
Maintenance hours and period	
Decision	Hold / Retest / Keep existing setup / Proceed to commercial review (circle one)
Reason	
Accountable role	
Decision date	
Next action	