**SAMPLE, NOT TRIALLED: illustrative records, not a product test**

# CRM workflow comparison worksheet

Edition: SAMPLE, NOT TRIALLED. 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** | Existing job software plus its accounting link |
| **Candidate B** | A CRM plus a proposed accounting or job connector |
| **Preparation date** | 6 November 2026 |
| **Workflow boundary** | One maintenance enquiry through invoice payment status |
| **Existing job and accounting products** | Not confirmed |
| **Trial owner** | Office role, sample |
| **Accounting reviewer** | Bookkeeper role, sample |
| **Decision owner** | Owner role, sample |
| **Source-record locations** | Sample references only, listed on the next page. Trial evidence: None |

# Reference records

SAMPLE, NOT TRIALLED: illustrative records, not a product test. One enquiry followed to payment status. Keep references and file locations only, not personal contact details.

| Field | Entry |
|---|---|
| **Enquiry** | ENQ-CRM-SAMPLE-6201, Customer A, sample; recorded 6 November 2026 |
| **Existing customer** | C-CRM-SAMPLE-6201, placeholder reference only |
| **Quote revision 1** | Q-CRM-SAMPLE-6201, A$1,200.00; superseded before approval |
| **Quote revision 2** | Same quote ID, revision 2, A$1,350.00; sample approval evidence reference APP-CRM-SAMPLE-6201 |
| **Job** | JOB-CRM-SAMPLE-6201, linked to quote revision 2 |
| **Invoice** | INV-CRM-SAMPLE-6201, A$1,350.00, hypothetical approved total |
| **Payment** | PAY-CRM-SAMPLE-6201, A$500.00 |
| **Remaining balance** | A$1,350.00 less A$500.00 = A$850.00 |
| **Retry** | EVT-CRM-SAMPLE-6201 arrives twice; expected invoice count is one |
| **Tax basis** | AUD sample document totals; no tax calculation or determination of tax treatment |

The sample amounts are sample document totals, never the cost of a CRM and never a project result. No tax calculation is made.

**Candidate A | R01 Product and connection scope | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R01 |
| **requirement** | Product and connection scope |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Office role; configuration register |
| **source_reference** | Vendor documentation not obtained |
| **destination_reference** | Scope register not completed |
| **direction** | Manual decision |
| **expected_result** | Exact CRM configuration, accounting product/version and connector publisher; dated vendor evidence for the required record types. Unconfirmed scope stays open. Sample expectation: Confirm the exact products and supported operations. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Obtain vendor scope evidence, 9 November 2026 |

**Candidate A | R02 Capture one enquiry | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R02 |
| **requirement** | Capture one enquiry |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Office role; enquiry system |
| **source_reference** | ENQ-CRM-SAMPLE-6201 |
| **destination_reference** | One saved enquiry, not yet created |
| **direction** | Enquiry source to chosen system |
| **expected_result** | One enquiry reference, its source, a responsible role and a next-action date appear once. Reopen the saved record. Sample expectation: One enquiry, one owner and a next action. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Run capture trial, 9 November 2026 |

**Candidate A | R03 Match the existing customer | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R03 |
| **requirement** | Match the existing customer |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Office role; customer master |
| **source_reference** | C-CRM-SAMPLE-6201 |
| **destination_reference** | Same customer, not yet matched |
| **direction** | Master to receiving system |
| **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. Sample expectation: Customer count remains one. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Run match and duplicate trial, 9 November 2026 |

**Candidate A | R04 Keep the quote and revision | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R04 |
| **requirement** | Keep the quote and revision |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Estimator role; quote register |
| **source_reference** | Q-CRM-SAMPLE-6201 revision 2 |
| **destination_reference** | Quote link, not yet saved |
| **direction** | Quote register to CRM |
| **expected_result** | Current quote ID, accepted revision, value and acceptance evidence remain linked to the enquiry. An obsolete revision is visibly superseded. Sample expectation: A$1,350.00 and revision 2 retained. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Open both saved revisions, 9 November 2026 |

**Candidate A | R05 Create the job after approval | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R05 |
| **requirement** | Create the job after approval |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Operations role; job register |
| **source_reference** | APP-CRM-SAMPLE-6201 |
| **destination_reference** | JOB-CRM-SAMPLE-6201, not yet created |
| **direction** | Approved quote to job register |
| **expected_result** | The approved quote links to one job. Record who authorises the transition. A pending quote does not create an authorised job. Sample expectation: One approved job. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Test pending and approved states, 9 November 2026 |

**Candidate A | R06 Reconcile the invoice | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R06 |
| **requirement** | Reconcile the invoice |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Bookkeeper role; ledger |
| **source_reference** | JOB-CRM-SAMPLE-6201 |
| **destination_reference** | INV-CRM-SAMPLE-6201, not yet created |
| **direction** | Approved job to ledger |
| **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. Sample expectation: A$1,350.00 with release decision recorded. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Compare saved invoice, 9 November 2026 |

**Candidate A | R07 Return payment status | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R07 |
| **requirement** | Return payment status |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Bookkeeper role; ledger |
| **source_reference** | PAY-CRM-SAMPLE-6201 |
| **destination_reference** | Status link, not yet created |
| **direction** | Ledger to customer record |
| **expected_result** | The recorded payment and outstanding balance reconcile to the ledger evidence. Quote/deal value is not treated as a cash receipt. Sample expectation: Paid A$500.00; outstanding A$850.00. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Test part payment, 9 November 2026 |

**Candidate A | R08 Retry without duplication | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R08 |
| **requirement** | Retry without duplication |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Maintainer role; event register |
| **source_reference** | EVT-CRM-SAMPLE-6201, repeated |
| **destination_reference** | Existing invoice or visible hold |
| **direction** | Event to receiving system |
| **expected_result** | Repeat the same event reference. One intended job or invoice remains, or a visible hold prevents another write. Retain the retry log. Sample expectation: No second invoice. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Replay event in trial, 9 November 2026 |

**Candidate A | R09 Change the scope safely | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R09 |
| **requirement** | Change the scope safely |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Estimator role; quote register |
| **source_reference** | Q-CRM-SAMPLE-6201 revisions 1 and 2 |
| **destination_reference** | Version record, not yet created |
| **direction** | Manual decision before update |
| **expected_result** | A changed quote has a new revision and approval evidence. The old revision does not overwrite the approved invoice silently. Sample expectation: A$150.00 change is traceable. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Test superseded revision, 9 November 2026 |

**Candidate A | R10 Recover a failed connection | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R10 |
| **requirement** | Recover a failed connection |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Maintainer role; exception register |
| **source_reference** | Connection failure trial |
| **destination_reference** | Alert and recovery evidence absent |
| **direction** | Connection to named maintainer |
| **expected_result** | Disconnect the trial connection. A named role receives an alert, can identify pending work and uses the recorded manual recovery route. Sample expectation: Pending work can be found and recovered. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Disconnect trial link, 9 November 2026 |

**Candidate A | R11 Verify access, location and exit | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R11 |
| **requirement** | Verify access, location and exit |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Owner role; access and export register |
| **source_reference** | Hosting, access and export evidence absent |
| **destination_reference** | Reopened export absent |
| **direction** | Approved export to local review |
| **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. Sample expectation: Required records reopen and omissions are named. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Obtain location and export evidence, 9 November 2026 |

**Candidate A | R12 Confirm commercial and maintenance terms | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | A |
| **requirement_id** | R12 |
| **requirement** | Confirm commercial and maintenance terms |
| **configuration** | Not confirmed: existing job software plus its accounting link |
| **record_owner** | Owner role; purchasing register |
| **source_reference** | Vendor quote and maintenance plan absent |
| **destination_reference** | Commercial review not ready |
| **direction** | Manual decision |
| **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. Sample expectation: All money and maintenance inputs confirmed. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Obtain quote and name cover, 9 November 2026 |

**Candidate B | R01 Product and connection scope | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R01 |
| **requirement** | Product and connection scope |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Office role; configuration register |
| **source_reference** | Vendor documentation not obtained |
| **destination_reference** | Scope register not completed |
| **direction** | Manual decision |
| **expected_result** | Exact CRM configuration, accounting product/version and connector publisher; dated vendor evidence for the required record types. Unconfirmed scope stays open. Sample expectation: Confirm the exact products and supported operations. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Obtain vendor scope evidence, 9 November 2026 |

**Candidate B | R02 Capture one enquiry | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R02 |
| **requirement** | Capture one enquiry |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Office role; enquiry system |
| **source_reference** | ENQ-CRM-SAMPLE-6201 |
| **destination_reference** | One saved enquiry, not yet created |
| **direction** | Enquiry source to chosen system |
| **expected_result** | One enquiry reference, its source, a responsible role and a next-action date appear once. Reopen the saved record. Sample expectation: One enquiry, one owner and a next action. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Run capture trial, 9 November 2026 |

**Candidate B | R03 Match the existing customer | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R03 |
| **requirement** | Match the existing customer |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Office role; customer master |
| **source_reference** | C-CRM-SAMPLE-6201 |
| **destination_reference** | Same customer, not yet matched |
| **direction** | Master to receiving system |
| **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. Sample expectation: Customer count remains one. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Run match and duplicate trial, 9 November 2026 |

**Candidate B | R04 Keep the quote and revision | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R04 |
| **requirement** | Keep the quote and revision |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Estimator role; quote register |
| **source_reference** | Q-CRM-SAMPLE-6201 revision 2 |
| **destination_reference** | Quote link, not yet saved |
| **direction** | Quote register to CRM |
| **expected_result** | Current quote ID, accepted revision, value and acceptance evidence remain linked to the enquiry. An obsolete revision is visibly superseded. Sample expectation: A$1,350.00 and revision 2 retained. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Open both saved revisions, 9 November 2026 |

**Candidate B | R05 Create the job after approval | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R05 |
| **requirement** | Create the job after approval |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Operations role; job register |
| **source_reference** | APP-CRM-SAMPLE-6201 |
| **destination_reference** | JOB-CRM-SAMPLE-6201, not yet created |
| **direction** | Approved quote to job register |
| **expected_result** | The approved quote links to one job. Record who authorises the transition. A pending quote does not create an authorised job. Sample expectation: One approved job. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Test pending and approved states, 9 November 2026 |

**Candidate B | R06 Reconcile the invoice | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R06 |
| **requirement** | Reconcile the invoice |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Bookkeeper role; ledger |
| **source_reference** | JOB-CRM-SAMPLE-6201 |
| **destination_reference** | INV-CRM-SAMPLE-6201, not yet created |
| **direction** | Approved job to ledger |
| **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. Sample expectation: A$1,350.00 with release decision recorded. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Compare saved invoice, 9 November 2026 |

**Candidate B | R07 Return payment status | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R07 |
| **requirement** | Return payment status |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Bookkeeper role; ledger |
| **source_reference** | PAY-CRM-SAMPLE-6201 |
| **destination_reference** | Status link, not yet created |
| **direction** | Ledger to customer record |
| **expected_result** | The recorded payment and outstanding balance reconcile to the ledger evidence. Quote/deal value is not treated as a cash receipt. Sample expectation: Paid A$500.00; outstanding A$850.00. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Test part payment, 9 November 2026 |

**Candidate B | R08 Retry without duplication | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R08 |
| **requirement** | Retry without duplication |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Maintainer role; event register |
| **source_reference** | EVT-CRM-SAMPLE-6201, repeated |
| **destination_reference** | Existing invoice or visible hold |
| **direction** | Event to receiving system |
| **expected_result** | Repeat the same event reference. One intended job or invoice remains, or a visible hold prevents another write. Retain the retry log. Sample expectation: No second invoice. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Replay event in trial, 9 November 2026 |

**Candidate B | R09 Change the scope safely | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R09 |
| **requirement** | Change the scope safely |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Estimator role; quote register |
| **source_reference** | Q-CRM-SAMPLE-6201 revisions 1 and 2 |
| **destination_reference** | Version record, not yet created |
| **direction** | Manual decision before update |
| **expected_result** | A changed quote has a new revision and approval evidence. The old revision does not overwrite the approved invoice silently. Sample expectation: A$150.00 change is traceable. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Test superseded revision, 9 November 2026 |

**Candidate B | R10 Recover a failed connection | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R10 |
| **requirement** | Recover a failed connection |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Maintainer role; exception register |
| **source_reference** | Connection failure trial |
| **destination_reference** | Alert and recovery evidence absent |
| **direction** | Connection to named maintainer |
| **expected_result** | Disconnect the trial connection. A named role receives an alert, can identify pending work and uses the recorded manual recovery route. Sample expectation: Pending work can be found and recovered. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Disconnect trial link, 9 November 2026 |

**Candidate B | R11 Verify access, location and exit | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R11 |
| **requirement** | Verify access, location and exit |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Owner role; access and export register |
| **source_reference** | Hosting, access and export evidence absent |
| **destination_reference** | Reopened export absent |
| **direction** | Approved export to local review |
| **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. Sample expectation: Required records reopen and omissions are named. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Obtain location and export evidence, 9 November 2026 |

**Candidate B | R12 Confirm commercial and maintenance terms | SAMPLE, NOT TRIALLED | WB-CRM-2026-11-06-v1**

| Field | Entry |
|---|---|
| **edition** | SAMPLE, NOT TRIALLED |
| **candidate_id** | B |
| **requirement_id** | R12 |
| **requirement** | Confirm commercial and maintenance terms |
| **configuration** | Not confirmed: a CRM plus a proposed accounting or job connector |
| **record_owner** | Owner role; purchasing register |
| **source_reference** | Vendor quote and maintenance plan absent |
| **destination_reference** | Commercial review not ready |
| **direction** | Manual decision |
| **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. Sample expectation: All money and maintenance inputs confirmed. |
| **observed_result** | Not run |
| **state** | Not run |
| **evidence_location** | None |
| **decision_owner** | Owner role, sample |
| **next_action_and_date** | Obtain quote and name cover, 9 November 2026 |

# Decision page

SAMPLE, NOT TRIALLED: illustrative records, not a product test. 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: Existing job software plus its accounting link

| Field | Entry |
|---|---|
| **Pass** | 0 |
| **Fail** | 0 |
| **Not run** | 12 |
| **Explained exclusions** | 0 |
| **Total of the four (must be 12)** | 0 + 0 + 12 + 0 = 12 |
| **Unresolved evidence** | All 12 rows: no trial has been run and no vendor evidence is attached |
| **Once-only cash cost** | Not confirmed |
| **Recurring cash cost and period** | Not confirmed |
| **Maintenance hours and period** | Not measured |
| **Decision** | Hold |
| **Reason** | Every row is Not run, so there is no evidence to compare |
| **Accountable role** | Owner role, sample |
| **Decision date** | 6 November 2026 |
| **Next action** | Run the 9 November 2026 trial and send the vendor evidence request |

## Candidate B: A CRM plus a proposed accounting or job connector

| Field | Entry |
|---|---|
| **Pass** | 0 |
| **Fail** | 0 |
| **Not run** | 12 |
| **Explained exclusions** | 0 |
| **Total of the four (must be 12)** | 0 + 0 + 12 + 0 = 12 |
| **Unresolved evidence** | All 12 rows: no trial has been run and no vendor evidence is attached |
| **Once-only cash cost** | Not confirmed |
| **Recurring cash cost and period** | Not confirmed |
| **Maintenance hours and period** | Not measured |
| **Decision** | Hold |
| **Reason** | Every row is Not run, so there is no evidence to compare |
| **Accountable role** | Owner role, sample |
| **Decision date** | 6 November 2026 |
| **Next action** | Run the 9 November 2026 trial and send the vendor evidence request |

**Combined: 0 + 0 + 24 + 0 = 24 rows (12 for each candidate).**