BIZTHRIVERS / FREE AGENCY RESOURCE

Map the form-to-CRM handoff.

One WordPress form, one connection path and one CRM destination. Use sample values, not customer data.

01 **Form, page, version and connection path**

Decision / owner: _____

02 **Field dictionary and CRM destination**

Decision / owner: _____

03 **Attribution and self-reported source**

Decision / owner: _____

04 **Routing, duplicate and update rules**

Decision / owner: _____

05 **Failure alert, replay and release evidence**

Decision / owner: _____

Mapping row: label / key / validation / destination / type / blank rule

The editable template adds the full mapping table, attribution and routing plan, failure record and six test actions. Keep secrets in the approved access system.

Website owner: _____ Integration owner: _____
CRM operator: _____ Release version: _____

Test the mapped handoff.

Compare the submitted payload with the final CRM state. Record only observed results and evidence locations.

01 Required and invalid values are handled

Valid input proceeds; invalid input is rejected or routed as written without a misleading success message.

Result: Untested / Needs work / Passed Evidence / owner: _____

02 Every field reaches the intended destination

Each value lands in the documented field and type; omitted optional values follow the written blank rule.

Result: Untested / Needs work / Passed Evidence / owner: _____

03 Attribution survives its tested paths

Captured and self-reported sources remain distinct; missing values and redirects behave as documented.

Result: Untested / Needs work / Passed Evidence / owner: _____

04 Routing has an owner and a fallback

The normal case reaches its owner; the no-match case stays visible with a responsible fallback.

Result: Untested / Needs work / Passed Evidence / owner: _____

05 Repeat submissions follow one update rule

The repeat follows the documented update rule without an unintended duplicate action or contradictory message.

Result: Untested / Needs work / Passed Evidence / owner: _____

06 A failed handoff can be found and replayed safely

An owner sees the failure; replay does not create an unintended duplicate and the final state is verified.

Result: Untested / Needs work / Passed Evidence / owner: _____

Release decision and remaining fixes

Ready / Needs work: _____ Approved by: _____
Fix / owner / retest: _____
Rollback owner / review date: _____