The record written into the CRM, field by field

LINDBERGH FORMATION — 16 rue de Maillé, 91310 Montlhéry, France · Companies register (RCS) Evry 817 946 114

Document issued on 09/11/2026

Quarter · fictional document

> **Fictional document — demonstration example**
> This document is produced by the Blue Lemon Agent website to illustrate what an AI agent hands to its users. The companies, matters, amounts and people in it are invented. It has no legal, accounting or commercial value.

> **Fictional document**, produced for the demonstration. **73 records out of 218 were never keyed in**: a third of your enquiries existed in no dashboard at all.

The eighteen fields written at the end of every exchange

Block of the record	Fields written	Where the value comes from
Identity	**4** — name, company, phone, e-mail address	Given by the person
Need	**3** — need in plain words, catalogue line, attachments received	**The enquirer's own words**
Maturity	**4** — deadline, budget quoted, second contact, score	Quoted in the exchange
Appointment	**4** — date, place, salesperson, confirmation status	The salesperson's calendar

Block of the record	Fields written	Where the value comes from
History	**3** — time-stamped exchange, entry channel, chasers sent	**In full, not summarised**
Total	**18 fields**	**Written with no keying**

What keying cost over the quarter

Item	Arithmetic	Total
Incoming enquiries	**218**	—
Keying per record, when it was done	**11 minutes**	—
Keying time	218 × 11 min = **2,398 minutes**	**More than 39 hours**
Records never keyed in	**73 out of 218**	**A third, invisible everywhere**

> **The cost was not the 39 hours, it was the 73.** An enquiry missing from the CRM appears in no dashboard, enters no follow-up sequence, and leaves with the salesperson who had it in their mailbox.

The twenty-two duplicates, and what stopped them

Measure	Before the fix	After the fix
Records written	**140**	**300**
Duplicates created	**22** — 15.7%	**0**
Matching keys	E-mail address alone	**Domain, phone, normalised name**

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Measure	Before the fix	After the fix
Resemblance without certainty	Record written anyway	**7 merges proposed — 6 accepted, 1 refused**

> **Writing a record can be undone; merging two records cannot.** That is why the merge is proposed and signed off by the salesperson for the territory, and why **both original records are kept for ninety days**.

> **Request a demo with your own documents**
> This document is a fictitious example. To see the agent work on your own documents, request a demo from its page.
> https://bluelemonagent.ai/en/entreprises/cas-usage/agent-ia-qualification-prise-rdv

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