



The record written into the CRM, field by field

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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	$218 \times 11 \text{ min} = \mathbf{2,398 \text{ minutes}}$	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

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.**

Scope of this document: the service operated by Blue Lemon Agent. For an agent deployed at your premises, the applicable location is that of the architecture set out in the quotation and verified before commissioning; local execution is announced only for the configuration explicitly described and accepted in the quotation; the applicable isolation depends on the deployment mode set out in the quotation, no dedicated isolation being presumed; the encryption mechanisms in transit and at rest, their components and key management are those documented for the architecture chosen; roles and permissions are configured and accepted for the identities and systems actually connected; the events logged, their content, their retention period and who may access them are defined for the deployment chosen.