Begin with the work

01 / Define the first outcome

1

Name the process

Describe the current sequence from a new request to its final outcome. Focus on the work before choosing screens.

2

Identify the people

List who enters records, who approves, who reads reports and who owns the data. Use real roles, not shared passwords.

3

Choose the first useful result

State what a person should be able to complete and how the team will recognise that result.

4

Record open questions

Mark uncertain requirements for discussion. Do not turn an assumption into an accepted feature or deadline.

Ready for the next conversation

- Write a short project brief using the companion form.
- Choose one representative workflow and a safe test scenario.

Prepare the working context

02 / Prepare data and access

1

Inventory the records

List required record types, fields, references and current sources. Identify duplicates and missing information.

2

Classify what is needed

Use only information needed for the agreed task. Keep sensitive details out of demonstration accounts and support screenshots.

3

Confirm access owners

Identify the domain, hosting, email and provider-account owners. Share access through an approved secure process.

4

Map the references

Create parent/reference records before dependent transactions. Confirm that all linked records belong to the intended workspace.

Ready for the next conversation

- Record field meanings and units before preparing an import or migration.
- File formats and migration automation must be evaluated for the actual system; this guide does not promise an automatic import.

Test what matters

03 / Evaluate the workflow

1. **Run the normal path**

   Use safe test data to complete the agreed action. Compare the stored result with the expected outcome.

2. **Check protective paths**

   Try an unauthorised role, wrong workspace, invalid reference or repeated action. Record what the system actually rejects.

3. **Trace the report**

   Link a displayed total or state back to the source records and date range. Distinguish created records from completed work or settled money.

4. **Review integrations separately**

   Provider credentials, merchant approval and callback verification are separate from a successful screen or redirect.

Ready for the next conversation

- Use the software evaluation checklist to retain evidence and unresolved items.
- A configuration diagram or short overview is not an end-to-end acceptance test.

Make ownership explicit

04 / Handover and support

1

Confirm the agreed scope

Retain the approved feature list, known limits, responsibilities and acceptance record.

2

Agree everyday operation

Identify administrators, support channels, account management and the people responsible for scheduled work.

3

Verify recovery

Agree who maintains backups and rehearse a suitable restoration process before important data depends on the system.

4

Report issues clearly

Use the support request form. Include context, reproducible steps, expected and observed results, and a redacted reference.

Ready for the next conversation

- Confirm actual support arrangements and commercial terms separately.
- Authorised signature when supplied. No signature or company seal is created by this guide.