Proposal automation mapping worksheet

Start with one proposal type. Define the source of each value and which document events may change the CRM.

Project / team: _____ Owner: _____
Date / edition: _____ Must-have outcome: _____

Value / decision	Leading source	Mapping / approval rule
Customer identity and signing contact		
Scope, template and permitted edits		
Products, quantity, price and currency		
Missing required value / pre-send review		
Document viewed: follow-up task or no CRM change		
Relevant agreement completed: defined acceptance conditions		
Amended / replaced / additional document: authoritative version		

Complete the blank fields with your actual configuration. The prompts are a working template, not evidence that the setup is already implemented.

Validate before you commit

Use one realistic scenario and one exception. Note the actual evidence, not only whether the connector or platform reports success.

[ ] The signing contact is deliberately selected.

[ ] Scope, price, currency and terms are reviewed before sending.

[ ] Edits after document creation follow a conflict rule.

[ ] A viewed document is not automatically a won opportunity.

[ ] Multiple, expired and declined documents are tested.

[ ] Repeated events cause no unintended duplicate action.

[ ] Delivery receives the approved scope and final document.

Critical blocker / missing evidence

Next action / responsible person

Decision / next review date

Reference / Referenz: https://support.pandadoc.com/en/articles/9714877-hubspot-crm-new-experience

Implementation guidance, not a performance guarantee. Verify current product scope and requirements before purchase or rollout.