

Explain differences. Preserve the evidence.

A sample comparison of lead-source and CRM exports, using shared identifiers and explicit review rules.

Demonstration only. Every record is synthetic. This AI-assisted project is not a client case study, a live tracking audit or evidence of recovered revenue.

Inputs	Period	Matching rule
8 source rows 7 CRM rows	1 Sep 2026 00:00 UTC inclusive 8 Sep 2026 00:00 UTC exclusive	account_id + event_id One synthetic account

What the sample identifies

Classification	Keys	Interpretation
Exact match	1	Compared fields agree.
Source only	1	Present in source; absent from supplied CRM export.
CRM only	1	Present in CRM; absent from supplied source export.
Values differ	1	Same key; amount and status differ.
Duplicate / ambiguous	1	A repeated source key is isolated; no arbitrary winner.
Window mismatch	1	Same key; one timestamp falls outside the agreed period.
Entirely outside window	2	Excluded from this reporting period.

Counts refer to distinct account-event keys, not rows. Categories are exclusive in this sample; the duplicate key has two source rows.

A missing record can result from filters, delayed exports or legitimate definitions. This comparison does not establish a tracking failure or lost sale.

From a discrepancy to a specific next check.

Selected synthetic exceptions are shown below. Suggested checks are investigative steps, not proven root causes.

Synthetic key	Evidence in supplied files	Suggested next check
event_002	Source amount 200 USD; no CRM row.	Confirm export completeness, period and integration logs.
event_003	Source: 300 USD / new. CRM: 350 USD / qualified.	Agree whether value and status should match at the same point in time.
event_004	Two identical source rows; one CRM row.	Resolve duplicate identity before selecting any record.
event_006	Source: 1 Sep 00:00 UTC. CRM: 31 Aug 23:59:59 UTC.	Confirm timestamp meaning and reporting boundary.

What a suitable pilot delivers

An evidence log, source-count controls, isolated ambiguous cases, coverage limitations and prioritized checks. Inputs remain unchanged. A valid report may find no defects.

Before any real records are shared

Confirm one account, two compatible exports and no more than 5,000 combined rows. Agree stable shared identifiers, event definitions, reporting window, timestamp conversion and currency. Initially share field names or a synthetic example only.

Exclude names, email addresses, phone numbers, free-text messages and sensitive fields. Pseudonymous identifiers can still be personal data; authorization, transfer, responsibilities and retention must be agreed.

Scope limits

No production changes, form or call tests, GA4/GTM/Ads certification, attribution assurance or revenue recovery claims. No credentials or live-system access are required for the file comparison.

Demonstration source: the TraceLead Ops local reconciliation fixture, run 9867fe572b1a. This PDF shows its saved sample results. It does not describe the separate browser demo as the same dataset.