

Vendor Scorecard: 7 Questions

Score every vendor on the same seven questions — on your own data, not the demo file.

Case / unit: _____

Date: _____

How to use it: write one vendor per column. Ask each question in the demo and mark **Y**, **N**, or **?** — then note what you actually saw, not what you were told. A "?" is a finding: it means the vendor couldn't show you.

Question — and what to watch for	Vendor 1	Vendor 2	Vendor 3
PART 1 — WILL IT HOLD UP IN COURT?			
1 Does it show you where a figure doesn't reconcile — can you fix it — is the fix logged? Watch for: a discrepancy flagged on screen, corrected in place, and an audit entry naming who changed what, when.			
2 Can they explain, step by step, how it reached a number? Watch for: a plain-language walk from source record to conclusion. "The algorithm handles it" is a No.			
3 Does every figure trace back to its exact source page, in one step? Watch for: one click from a number to the page it came from — on a real statement you supplied.			
4 Who — and what — touches your case data? Watch for: a direct answer on outsourced or crowdsourced review, and whether they can name every step in the chain.			
PART 2 — CAN YOUR TEAM ACTUALLY RUN IT?			
5 Do the everyday functions work on your data? Watch for: filtering by account, date, payee — run on your messiest real statement, not their sample.			
6 Can a two- or three-person team run it directly? Watch for: whether a training budget, an implementation project, or a dedicated analyst is assumed.			
7 What are you committing to before you know it works? Watch for: minimum, contract term, what happens to unused volume, and whether you can start on one matter.			
Score (✓ out of 7) · Cost for your actual volume · Verdict			