

Phone & booking trial scorecard

Use the same practice calls to compare providers before routing a real shop number.

SHOP / TEST SETUP	PROVIDER	DATE
Use fictional names and details. Run the same cases with each option. A request is not a confirmed appointment.		
TEST	WHAT TO OBSERVE	MARK ONE
Approved facts	Uses only shop-approved hours, services, prices, and durations; routes missing details instead of guessing.	☐ P ☐ R ☐ F
Service + provider fit	Handles the requested service and provider only when shop rules and the schedule support it.	☐ P ☐ R ☐ F
Blocked time	Keeps a blocked or unavailable time unavailable; does not imply that it is held.	☐ P ☐ R ☐ F
Request vs. confirmation	Says request received or confirmed accurately; verify any confirmed result in the schedule.	☐ P ☐ R ☐ F
Unknown or exception	Does not invent a price or policy; offers a useful next step or a human callback.	☐ P ☐ R ☐ F
Change or cancellation	Follows the approved rule and reports success only after the change actually completes.	☐ P ☐ R ☐ F
Fallback	You know how to pause or transfer handling during an outage or an unresolved call.	☐ P ☐ R ☐ F
Data handling	Ask who can access recordings or transcripts, what is kept, for how long, and how to delete it.	☐ P ☐ R ☐ F

P = pass R = review F = fail

PAUSE BEFORE LIVE ROUTING

Resolve any fail or unclear result on blocked time, confirmation, fallback, or data handling.

PASSES	FOLLOW-UP / OWNER	RETEST DATE

A pass reflects only the test you ran; it does not certify reliability, privacy, or an integration.

Confirm platform compatibility and shop requirements with the provider.

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