

CRM cleanup queue: example sources

Fictional records and notes for a worked example. Review cutoff: October 2, 2026 at 16:00 UTC (9:00 a.m. Pacific). Times below are UTC.

DEMO-1042 · Cedar Works

Owner: Mei · Open deal · **Close date:** 2026-09-30

Next step: Legal review

Field source time: 2026-09-23T17:20:00Z

Record checked: 2026-10-02T15:58:00Z

DEMO-1048 · Northwind Labs

Owner: Alex · Open deal · **Close date:** 2026-10-20

Next step: Blank

Field source time: 2026-09-30T18:00:00Z

Record checked: 2026-10-02T15:58:00Z

NOTE-2048 · 2026-10-01T18:00:00Z

“Alex to send the security questionnaire by October 6. Buyer review meeting October 8.”

Note checked: 2026-10-02T15:59:00Z

DEMO-1053 · Summit Supply

Owner: Jo · Open deal · **Close date:** 2026-10-29

Next step: Proposal follow-up · **Amount:** 70000 USD

Field source time: 2026-09-10T16:00:00Z

Record checked: 2026-10-02T15:58:00Z

MEETING-3053 · 2026-10-01T20:00:00Z

“Buyer attended a review. Discussed a smaller first phase around USD 50,000, subject to revised scope.”

Note checked: 2026-10-02T15:59:00Z

DEMO-1060 · Harbor Studio

Owner: Sam · Open deal · **Close date:** 2026-10-23

Next step: Blank

Field source time: 2026-09-18T16:00:00Z

Record checked: 2026-10-02T15:58:00Z

Associated notes: Permission unavailable. Activity not fully checked.

The source lists include DEMO-1048 twice. It is one deal, not two cleanup items. These sample IDs identify the example records, not live HubSpot records.