

Two companies, two scans

Page 1: choose the two companies

Pick the portfolio company with the newest CFO and the one with the most recent add-on. Fill one column per company; each becomes the agreed scope of that company's free Proof of Value: which entity, which systems, which period. The sheet is an editorial aid, not a product screen.

FIELD	COMPANY A	COMPANY B
Company and platform or add-on		
Entity for the Proof of Value		
ERP and banks		
Period to scan (which months)		
CFO (approves the engagement)		
Last add-on date, and whether it carries stock		
Close, in days		
Lender reporting day		
Known worries		

Known worries are what the CFO already suspects: a distributor rebate never reconciled, a vendor set up twice, short-pays written off, bank items aged past 60 days, stock that never ties to the ledger.

Rever connects read-only to NetSuite, Dynamics 365, QuickBooks, Stripe, the banks and documents. Note any other system; Rever will say on the call whether it can be scanned.

Page 2: compare the two readouts

Fill this after each company's walkthrough. Use categories and counts. Dollar amounts belong in each company's findings with their evidence, and the honesty ratio is the number to compare.

READOUT	COMPANY A	COMPANY B
Identified: duplicate payments		
Identified: price drift against PO or contract		
Identified: unclaimed rebates and credits		
Identified: short-pays and deductions		

READOUT	COMPANY A	COMPANY B
Identified: contract price changes or milestones not invoiced		
Identified: unmatched bank and processor items		
Recovered so far (cash received or credit applied)		
Honesty ratio (value recovered divided by value found)		
Coverage gaps (missing sources, blocked procedures)		
Decision: continue, add a company, pause		
Read the two columns apart. The platform and the add-on leak in different places, and the fixes differ. A finding counts as recovered only when cash is received or a credit is applied, and each claim needs the CFO's approval. Get a free Proof of Value: rever.ai/proof-of-value		