

Your software already holds the numbers. This checklist confirms we can get to them cleanly, link them correctly, and keep them current — before we scope the build.

1 Three gate questions — ask first

1. **Can your software export data or connect via API?** We need at least one way out.
2. **Can we get a sample export?** One real file shows us field names, formats, and gaps.
3. **Who owns / gives access?** Name the person who can approve and grant it.

No sample or no access owner = we pause the scope until one appears.

2 Five ways data gets out — any one is enough

1. **API** — live or scheduled pull; best for real-time views.
2. **Scheduled CSV / Excel export** — automatic file drop on a set rhythm.
3. **Read-only database access** — direct, view-only connection. No write access needed.
4. **Existing emailed reports** — we parse reports you already receive.
5. **Manual upload** — you drop a file; we ingest it. Works when nothing else does.

3 The field check

Views link and drill down only if each record carries:

- **Unique IDs** — job, invoice, employee, or record number
- **Dates** — created, due, completed, or paid
- **Amounts** — revenue, cost, or balance as numbers, not text
- **Statuses** — open / closed, stage, or outcome
- **Assignments** — person, crew, location, or unit on the record

Before launch, we **reconcile dashboard totals against your software's own reports**. If they don't match, we fix the mapping — not the number.

4 Sync rhythm — pick one

- **Real-time** (API) — for boards watched all day
- **Hourly** — same-day pace without live load
- **Daily** — most owners' default; fresh each morning

5 Permissions

- **Owner sees everything** — all locations, all views.
- **Managers scoped** — limited by location or unit, so each sees only their operation.

We set this from your list of viewers; you can change it later.

6 If a field isn't tracked

Two honest options: add a lightweight supplement sheet for that one missing field, or drop that one view. We never estimate, back-fill, or fake a number your system does not capture.

Worked example: SmartFusion

What it is: a local government ERP by Harris (Harris Local Government / Harris Computer) purpose-built for municipalities, counties, and public sector agencies.

Where the data lives: fund accounting / fund ledger, accounts payable, payroll & HR, billing and revenue (utility billing, tax collections, accounts receivable, cash collection), purchasing, fixed assets, and community development (permitting, licensing, land / asset management).

The open question: third-party listings claim public API access, but that is **unverified**. The consult ask stays the same: **API documentation, or a sample report export plus their report definitions** — so we map fields to their terms, not ours.

Likely first dashboards:

- Budget-vs-actual by fund and department
- Revenue collections by source and period
- Open purchase-order aging
- Payroll cost by department
- Permitting pipeline

Ready to scope

- ☐ Sample file received and opened
- ☐ Field definitions confirmed in their terms
- ☐ Access owner named
- ☐ Refresh rhythm picked
- ☐ Viewers and permissions listed

All five checked = we can scope the build with confidence — the same dashboard layer, fed by your system.