

VIRGO Financial Dashboard — Step-by-Step Build Order (v1)

PHASE 1 — FOUNDATION

1. VIRGO sets up Supabase, GitHub, Vercel, Pipedream.
2. Developer invited to all accounts.
3. Create base Supabase schema.
4. Create SQL Views for analytics.
5. Implement projection function (SQL).

PHASE 2 — QUICKBOOKS INTEGRATION

1. Implement OAuth connect workflow.
2. Test storing tokens in Supabase.
3. Build 24-month backfill workflow.
4. Validate historical data.
5. Build daily incremental sync workflow.
6. Add sync logs + error logs.

PHASE 3 — FRONTEND DASHBOARD

1. Build auth flow (Supabase Auth).
2. Company selector page.
3. Dashboard shell layout.
4. P&L; page (charts + cards).
5. Cash flow page.
6. KPI summary page.

PHASE 4 — INTERNAL DEPLOYMENT

1. Connect Budd's, Ecoast, Shore Handyman.
2. Validate accuracy vs QuickBooks.

3. Optimize queries.

4. Deploy to Vercel.

PHASE 5 — FUTURE EXPANSION

1. Conversational widget builder.

2. Drag/drop dashboard layout.

3. External customer onboarding flow.