

# Sales Dashboard

## Requirements Questionnaire

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|---------------------|--|
| <b>Project:</b>     | Monday.com to Excel Sync & Sales Dashboard |
| <b>Client:</b>      | TAG Urbanic                                |
| <b>Date:</b>        | December 2025                              |
| <b>Prepared by:</b> | Drishti Consulting                         |

This document outlines the key decisions needed to finalize the Sales Dashboard application. Please review each section and provide your responses to ensure the system meets your business requirements.

## Section 1: Access & Security

**1.1** How many people from the company will have access to the app?

*Response:* \_\_\_\_\_

**1.2** What level of security is required for access?

- ☐ Email & Password
- ☐ Single Sign-On (SSO)
- ☐ Two-Factor Authentication (2FA)
- ☐ Other: \_\_\_\_\_

**1.3** Should there be different user roles with different permissions?

- ☐ Yes
- ☐ No

*If yes, specify roles:* \_\_\_\_\_

**1.4** Do you require an audit log tracking who accessed the app and when?

- ☐ Yes
- ☐ No

**1.5** Should users be restricted to viewing specific projects only?

- ☐ Yes
- ☐ No

## Section 2: Data Synchronization

- 2.1** What should trigger the data sync between Monday.com and Excel?
- ☐ Real-time (any update in Monday.com)
  - ☐ Scheduled (hourly, daily, etc.)
  - ☐ When opening the app
  - ☐ Manual button click only
  - ☐ Combination: \_\_\_\_\_
- 2.2** If scheduled, how often should the sync run?
- ☐ Every hour
  - ☐ Every 4 hours
  - ☐ Daily at \_\_\_\_:\_\_\_\_ AM/PM
  - ☐ Other: \_\_\_\_\_
- 2.3** Should the sync be one-way or two-way?
- ☐ One-way: Monday.com to Excel only
  - ☐ Two-way: Changes sync in both directions
- 2.4** If there is a conflict between Monday.com and Excel data, which should take priority?
- ☐ Monday.com (source of truth)
  - ☐ Excel
  - ☐ Alert user to resolve manually
- 2.5** Should empty values in Monday.com overwrite existing Excel data?
- ☐ Yes
  - ☐ No (preserve existing Excel data)

## Section 3: Data Storage & Backup

**3.1** Where should the updated Excel file be saved?

- ☐ Local server
- ☐ Google Drive
- ☐ Microsoft OneDrive / SharePoint
- ☐ GitHub repository
- ☐ Other: \_\_\_\_\_

**3.2** Do you need automatic backups of the Excel file before each sync?

- ☐ Yes
- ☐ No

**3.3** How long should change logs be retained?

- ☐ 30 days
- ☐ 90 days
- ☐ 1 year
- ☐ Indefinitely

**3.4** Should backup copies be stored in a separate location?

- ☐ Yes - Location: \_\_\_\_\_
- ☐ No

## Section 4: Data Scope (Approval Required)

### 4.1 Monday.com to Excel Sheet Mapping

| Monday.com Board  | Group            | Target Excel Sheet     | Approve?   |
|-------------------|------------------|------------------------|--|
| Data Base_Clients | Sales_Horizon    | SAL D'OURO HORIZON (9) | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Data Base_Clients | Sal D'Ouro_Coast | SAL D'OURO COAST (10)  | <input type="checkbox"/> Yes <input type="checkbox"/> No |

### 4.2 Field Mapping

| Monday.com Field | Excel Column       | Include in Sync?   |
|------------------|--------------------|--|
| Client Name      | Client             | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Unit             | Unit               | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Fraction         | Fraction           | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Layout           | Layout             | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Floor            | Floor              | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Status           | Status             | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Broker           | Brokers company    | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Date Signed      | Date of CPCV       | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Nationality      | Client Nationality | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Email            | Email              | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Phone            | Phone              | <input type="checkbox"/> Yes <input type="checkbox"/> No |

### 4.3 Are there additional Monday.com boards that should be included?

☐ Yes

☐ No

If yes, board names: \_\_\_\_\_

### 4.4 Should the summary sheet ("sales report - general") auto-recalculate after sync?

☐ Yes

☐ No

## Section 5: Notifications & Alerts

**5.1** Should users receive notifications when sync completes?

- ☐ Yes
- ☐ No

**5.2** How should notifications be delivered?

- ☐ In-app notification
- ☐ Email
- ☐ Both

**5.3** Should there be alerts for sync errors or data conflicts?

- ☐ Yes
- ☐ No

**5.4** Who should receive error notifications?

Email 1: \_\_\_\_\_

Email 2: \_\_\_\_\_

**5.5** Do you want a daily/weekly summary report of all changes?

- ☐ Daily
- ☐ Weekly
- ☐ No

## Section 6: Deployment & Hosting

**6.1** Where should the application be hosted?

- ☐ Local server (your infrastructure)
- ☐ Cloud - AWS
- ☐ Cloud - Microsoft Azure
- ☐ Cloud - Google Cloud
- ☐ Streamlit Cloud
- ☐ Other: \_\_\_\_\_

**6.2** Do you need a custom domain?

- ☐ Yes - Preferred domain: \_\_\_\_\_
- ☐ No (default URL is acceptable)

**6.3** What is the expected uptime requirement?

- ☐ 24/7 availability
- ☐ Business hours only
- ☐ Best effort

**6.4** Do you need a staging/test environment separate from production?

- ☐ Yes
- ☐ No

## Section 7: Future Considerations

**7.1** Do you anticipate adding more projects to the system in the future?

☐ Yes - Estimated number: \_\_\_\_\_

☐ No

**7.2** Will additional team members need access in the future?

☐ Yes - Estimated number: \_\_\_\_\_

☐ No

**7.3** Are there other Monday.com boards you may want to integrate later?

☐ Yes

☐ No

*If yes, board names:* \_\_\_\_\_

**7.4** Do you need mobile access to the dashboard?

☐ Yes

☐ No

☐ Nice to have

**7.5** Are there any other integrations you would like to consider?

☐ Power BI

☐ Google Sheets

☐ Salesforce

☐ Other: \_\_\_\_\_



## Section 8: Additional Comments

Please provide any additional requirements, concerns, or questions:

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**Section : Sign-Off**

By signing below, you confirm that the responses provided in this document accurately reflect your requirements for the Sales Dashboard application.

**Client Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Thank you for completing this questionnaire.**

Please return the completed document to Drishti Consulting.