

# 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:

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### 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:

## 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.