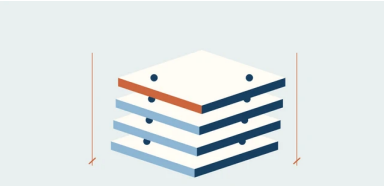
Reporting dataset build



We combine three agreed exports into one documented refreshable reporting table.

Who it helps

SME managers and reporting teams

The problem to solve

Combining reports by copying between sheets can result in duplicated rows or mismatched dates.

Working through the brief

1. **Inspect three agreed exports**

   Gather the agreed inputs. Representative exports, field meanings and agreed cleaning rules.

2. **Align keys, fields and formats**

   Track “Source export” and “Matched field or key” together so the reviewer can connect the source information to the result.

3. **Test the reporting refresh**

   Use a documented reporting table to reproduce the combined dataset and investigate source differences.

4. **Check the scope at handover**

   Licences, hosting and extra data sources require separate agreement.

Worked example

A reporting table joins customers to orders. Check whether repeated customer rows inflate the reported total.

Read the service scope / DAT-012

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