# Read the label first

01 / Know what the number measures

### A COUNT NEEDS A DEFINITION

The core workspace dashboard counts stored records across the systems permitted to the selected workspace and role. A record count is not automatically a count of unique customers, completed jobs or paid transactions.

| Core measure | Interpretation |
| --- | --- |
| Total records | Sum of the included record types in the current scope. |
| Systems | Count of systems currently included for this workspace and role. |
| Members | Recorded membership count for the workspace. |
| Bars | Record counts by system or, within a system, by record type. |
| States | Counts grouped by saved state labels across included records. |
| Months | Records created in each displayed month; not a revenue series. |

Before sharing a figure, record the workspace, system, role, displayed update time and any filters. Two users can see different permitted scope.

# Trace the chart

02 / Time and state / Avoid false comparisons

## Created is different from completed

The core monthly series uses record creation time. A record created in one month can reach a later state in another month. Do not present the creation series as completed sales, utilisation or cash received.

## State labels describe records

A state distribution can mix record types. "Active" may describe reference records, while "completed" describes a workflow outcome. A percentage of records is not a percentage of customers, capacity or money.

## Look at the refresh timestamp

The core dashboard provides an updated timestamp labelled EAT. Confirm the time context when comparing exports or another system. A refresh updates the view of recorded data; it does not create an external transaction or a provider confirmation.

> **WHEN A CHART IS EMPTY**
>
> An empty series can reflect no records in the current scope, restricted permissions or a different date range. Inspect the source before treating an empty chart as a business result.

# Verify before concluding

03 / Amounts and documents / Match the source

1

### Open the source record

Identify the system, record type and reference behind the number. Read its saved state and relevant date.

2

### Explain the fields

Distinguish entered amounts from server-calculated fields. Follow the formula or reference described in the module guide.

3

### Check external confirmation separately

A total, completed job or manual verification state is not the same as a provider-verified payment capture or bank reconciliation.

4

### Understand the PDF

A generated PDF is a snapshot of recorded data. It is not a government licence, statutory filing, accredited qualification or automatically executed agreement.

**SIGNATURE AND ISSUANCE**

Ready informational documents may be system-issued. A CEO autograph, official stamp or company seal must never be invented. Use "Authorised signature when supplied" where a real approval space is required.

# Share a useful finding

04 / Reproducible review / Keep enough evidence

| Retain | Reason |
| --- | --- |
| Workspace and role | Shows the permitted data scope. |
| Record references | Lets an authorised reviewer locate the source. |
| Date range and timestamp | Makes comparisons reproducible. |
| Measure definition | Prevents a record count from being described as revenue or unique people. |
| Expected versus observed | Separates a question from an assumption. |
| Redacted evidence | Supports review without exposing secrets or unnecessary personal data. |

## A practical review note

"In [workspace], using [role], the [measure] at [time] shows [observed result]. The source records [references] have [states/dates]. I expected [result] because [reason]. Please review [specific question]."

Company website
https://codetechsoftwares.com

Personal studio
https://stephenochieng.online