

DistrictOps Reconcile — Pilot Starter Checklist

One-page export checklist for finance + facilities pilot setup.

Best fit: multi-campus districts with separate CMMS + AP workflows and vendor-managed work.

What we need

1. Scope one vendor, up to three campuses, and 30–60 days of exports for the pilot.
2. Provide CMMS work orders with campus, asset, vendor, dates, and labor hours.
3. Provide ERP / AP exports with PO number, invoice number, approved amount, and campus coding.
4. Provide vendor invoice files or a CSV export from AP for the same date window.
5. Optional but useful: SLA targets, contract terms, or helpdesk / Incident IQ crossover tickets.
6. Confirm reviewer roles for facilities, AP, cabinet, and vendor-facing evidence sharing.
7. Agree on success metrics: duplicate spend found, ghost spend resolved, SLA disputes documented, and weekly review time reduced.

Pilot guardrails

DistrictOps starts with CSV upload or district-hosted SFTP, least-privilege access, and no write-back into source systems.

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