***E-commerce Dashboard Project Requirements Template***

***1. Project Overview***

***Project Name:*** Payments and Financial Dashboard

***Project Owner:*** Ana Duarte

***Business Department(s):*** Finance Department

***Objective:*** Payments by type, payment type trends over time, installment distribution, transaction value by product category

***2. Target Audience***

***Who will use the dashboard:*** Financial team

***Frequency of Use:*** Monthly

***Access Requirements:*** Dashboard shared on BI tool with Financial Department and restricted to other users

***3. Key Questions to Answer***

What is the most preferred type of payment used?

What is the trend in the type of payment used over the days, months and years?

What is the distribution of the installments?

What is the total price per product?

What are the top 5 product categories purchased?

***4. Key Metrics to Include***

Total Payment Volume, Payment Type Distribution, Installments by Payment Type, Average Transaction Value

***5. Data Sources***

***Primary Data Tables:*** Orders, Payments, Items, Products

***External Data Sources Needed:*** Payment Information

***Data Refresh Frequency:*** Daily

***6. Charts and Visualization Preferences***

***Types of Charts Needed:*** Line chart for trends, bar charts for categories, vertical bar charts for ranking

***Layout Preferences:*** Multiple tabs for different categories

***Highlight Features:*** Filters by year and month

***7. Technical Requirements***

***Platform and Tools to be Used:*** Power BI

***Interactivity Needs:*** Filtering by date

***Export/Sharing Options:*** Sharing via link

***8. Expected Outcomes and Success Criteria***

***Quantitative Goals:*** Increase payment trends over time by 10%

***Qualitative Goals:*** Improve customer satisfaction by understanding which installments are typically most used

Learn about consumer choices when making payments

***9. Timeline and Milestones***

***Project Start Date:*** 13/11/2024

***Expected Completion Date:*** 24/11/2024

***Key Milestones:*** Dashboard

***10. Stakeholders and Approvals***

***Primary Stakeholders:*** Financial Team

***Approval Needs:*** Financial Team

***Feedback Loops and Reviews:*** *Monthly review meeting with stakeholders*