Business Requirement Document

Business Requirement:

Create a Power BI report with **3 pages**:

- 1. Sales Summary
- 2. Customer Analysis
- 3. Product Analysis

General Information:

- The report should be neat and easy to understand for the end users.
- It should not provide any vague information without context
- Should have a standard colour formatting across all the visuals
- Should have standard font style and colours

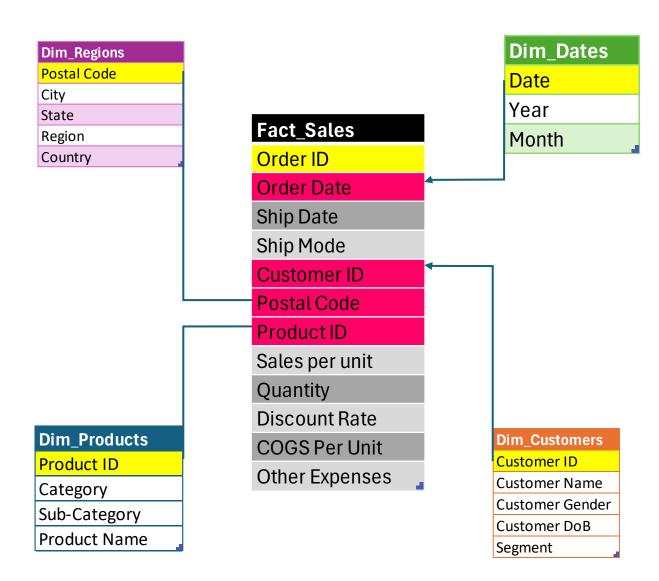
Calculated Columns Using Power Query

- 1. Gross Sales = Units Sold * Unit Price
- 2. Discount = Gross Sales * Discount Rate
- 3. Net Sales = Gross Sales Discount
- 4. COGS = COGS Per Unit * Unit Sold
- 5. Gross Profit = Net Sale COGS
- 6. Net Profit = Gross Profit Other Expenses

Data Model

Create a data model using star schema methodology, there will be 4-dimension tables:

- 1. Dim_customers connected to Facts sales via Customer ID(1:M)
- 2. Dim_products connected to Fact Sales via Product ID (1:M)
- 3. Dim_regions connected to Fact Sales via Postal Code (1:M)
- 4. Dim_date connected to Fact Sales via date and order date (1:M)



Sales Summary

Sales Summary should contain the following metrics and information:

- 1. A proper title for the report (e.g., Sales Summary).
- 2. Key metrics: Total Sales, Total Quantity Sold, Total Profit, Gross Profit Margin and Net Profit Margin.
- 3. A visual showing **Year-on-Year comparison of** Total Sales, Total Quantity Sold, Total Profit, Gross Profit Margin and Net Profit Margin.
- 4. A visual showing the units sold by months compared to same month last year.
- 5. A visual showing **State-wise Sales comparison.**
- 6. A visual showing YTD sales by year and month and by Product category (use Matrix visual).
- 7. A visual showing Total Sales by Category.
- 8. A visual showing top 10 states by units sold.
- 9. At the bottom of the report provide **detailed table** showing **Order ID**, **Order Date**, **Ship Date**, **Ship Mode**, **Gross Sales**, **Unit sold**, **Discount**, **COGS**, **Net Sales**, and **Profit**.
- 10. Add slicers for Date, Sates, Product Category and customer age category

Customer Analysis

Customer Analysis Page should include the following metrics and information:

- 1. A clear and relevant title for the report e.g. Customer Analysis
- 2. Key Metrices: Total Customers, Average Age of Customers, Total Male Customers and Total Female Customers
- 3. Year-on-year comparison of customer count
- 4. Distribution of customers across segments
- 5. Distribution of **customers across regions**.
- 6. A visual showing top 10 customers by units sold.
- 7. Customer age profiling based on the following categories:

5–10 Years: Kids

11–17 Years: Teens

18–24 Years: Young Adults

25-34 Years: Adults

35–54 Years: Middle-Aged Adults

55+ Years: Seniors

- **8. Detailed Customer Table**: Include the following fields: Customer ID, Name Gender, Age Category, Quantity Sold and Gross Sales, Net Sales,
- 9. Add slicers for **Date, Sates, Product Category and customer age category**

Product Analysis

Product Analysis Page should include the following metrics and information:

- 1. A clear and **relevant title** for the report e.g. *Product Analysis*
- 2. Key Metrices: Total Number of products, Units sold.
- 3. A visual showing to **10 top selling products**.
- 4. A visual showing **10 least selling products**.
- 5. Total Number of products by category, and sub-category.
- 6. A visual showing cumulative value of units sold.
- 7. **Detailed Customer Table**: Include the following fields: Product ID, Category, Sub-Category, Product Name, Units sold, Gross sales, Net Sales, Gross Profit and Net Profit
- 8. Add slicers for Date, Sates, Product Category and customer age category