

Business Demand and User Stories

Reporter: Sales manager

Value of change: Visual dashboards and improved sales reporting

Necessary systems: Power BI, CRM systems

Other relevant information: Budget has been delivered in Excel for 2021

User Stories:

No	As a (role)	I want (request/demand)	So that I (user value)	Acceptance Criteria
1	Sales Manager	To get a dashboard overview of internet sales	Can follow better which customers and products sell the best	A Power BI dashboard that updates data once daily
2	Sales Representative	A detailed overview of Internet sales per customer	Can follow up with customers who buy daily and who we can sell	A Power BI dashboard that allows filtering of data per customer
3	Sales Representative	A detailed overview of Internet sales per product	Can follow up on most sold products	A Power BI dashboard that allows filtering of data per product
4	Sales Manager	A dashboard overview of Internet sales	Can track sales performance over time relative to the budget.	An optimized Power BI dashboard featuring graphs and key performance indicators (KPIs) for comparing actual sales data against the budget.

Data Cleaning and Transformation Using SQL

Tables were derived from the raw data using the provided SQL queries to establish the necessary data structure and model required to address the business requirements outlined in the user stories above.

In addition to the extracted data, a sales budget dataset in Excel format was incorporated and linked to the cleansed and transformed data within the Power BI data model.