

# PROPOSAL

## SALES ANALYTICS & BUDGET MANAGEMENT

Project Title: Sales Analysis with Budget Management

Prepared by: Ayush Dash

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### PROJECT OVERVIEW

This project aims to develop a comprehensive Sales Analysis Dashboard combined with Budget Management using advanced visualization tools and robust data sources. The goal is to track real-time sales performance, compare against budget forecasts, and deliver meaningful insights for strategic decision-making.

### GOALS AND OBJECTIVES

- Visualize key sales KPIs and trends
- Enable detailed comparisons of actual vs. budgeted performance
- Provide dynamic filters by product, client, region, and sales rep
- Support proactive budgeting and resource allocation decisions

### PROJECT COMPLEXITY

- Level: Intermediate
- Combines real-time data integration, calculated logic, and secure access controls

### TIMELINE

- Week 1:
  - Requirement gathering & data source setup
  - PostgreSQL connection and data model design
  - Initial dashboard layout in Power BI
- Week 2:
  - Advanced DAX and calculated metrics
  - Budget integration
  - Role-based and row-level security
  - Final review and deliverables

## TECHNOLOGY STACK

- Power BI – Data visualization and dashboard development
- PostgreSQL – Primary data source for transactional and budget data
- Excel – Used for ad hoc reporting and stakeholder collaboration

## LEARNING CURVE AND REQUIRED SKILLS

- Data modeling and transformation using Power Query
- Writing DAX for KPIs, time intelligence, and measures
- Intermediate SQL for PostgreSQL
- Understanding of sales workflows and financial planning

## INTEGRATION WITH OTHER SYSTEMS

- Native support for PostgreSQL ensures smooth data import and refresh
- Easy integration with Excel for export and collaboration
- Scalable for cloud and on-prem database environments

## SECURITY MEASURES

- Role-Based Access Control (RBAC): Limits access based on user roles (e.g., managers, sales reps)
- Row-Level Security (RLS): Restricts visibility of data at the row level, e.g., a sales rep only sees their region

## ADDITIONAL NOTES

This dashboard will provide your team with accurate, real-time sales tracking and budget insights using Power BI with PostgreSQL, empowering better decisions, faster responses, and improved alignment with business goals.