

# User Story | Sales Performance

## Introduction

This user story outlines the specifications for building two dashboards using tableau to help stakeholders, including sales managers and executives to analyse sales performance and customers.

## Sales Dashboard | Requirements

### Dashboard Purpose

The purpose of sales dashboard is to present an overview of the sales metrics and trends in order to analyse year-over-year sales performance and understand sales trends.

### Key Requirements:

#### KPI Overview

Display a summary of total sales, profits and quantity for the current year and the previous year.

#### Sales Trends

- Present the data for each KPI on a monthly basis for both the current year and the previous year.
- Identify months with highest and lowest sales and make them easy to recognize.

#### Product Subcategory Comparison

- Compare sales performance by different product subcategories for the current year and the previous year.
- Include a comparison of sales with profit.

#### Weekly Trends for Sales & Profit

- Present weekly sales and profit data for the current year.
- Display the average weekly values.
- Highlight weeks that are above and below the average to draw attention to sales & profit performance.
- Identify months with highest and lowest sales and make them easy to recognize.

#### Customer Distribution by Number of Orders

Represent the distribution of customers based on the number of orders they have placed to provide insights into customer behaviour and engagement.

#### Top 10 Customers by Profit

- Present the top 10 customers who have generated the highest profits for the company.
- Show additional information like rank, number of orders, current sales, current profit and the last order date.

# Design & Interactivity Requirements

## Dashboard Dynamic

- The Dashboard should allow users to check historical data by offering them the flexibility to select any desired year.
- Provide users with the ability to navigate between the dashboards easily.
- Make the charts and graphs interactive, enabling users to filter data using the charts.

## Data Filters

Allow users to filter data by product information like category and subcategory and by location information like region, state and city.