1. What is this use case about?

Name: Enterprise Financial Analytics & Unified Reporting
Target: Big organisations in Banking, Insurance, FMCG, Pharma, Corporate Finance – basically any company with complex finance.

Goal:
Give the CFO/FP&A team **one unified platform** to see P&L, cash flow, and liquidity across the whole business **without** relying on manual Excel and disconnected systems.

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2. The problems (Critical Issues)

Large enterprises usually have:

1. **Manual Excel-heavy FP&A**
   - Finance teams export data from ERP, CRM, billing, etc.
   - Then they combine everything in Excel with vlookups, macros, offline templates.
   - This is slow, error-prone, and hard to audit.
2. **Long closing cycles**
   - Month-end / quarter-end closing takes many days or even weeks.
   - Every small change requires re-running Excel models and checking numbers again.
   - Management waits too long for final reports.
3. **Fragmented finance systems**
   - Data lives in multiple systems:
     - ERP / GL (e.g., SAP/Oracle) for core accounting
     - Billing system for invoices
     - CRM for customer and sales data
   - No single place where **all financial truth** lives.
   - This makes consolidated reporting and forecasting very difficult.

So:
👉 The business problem is **slow, manual, fragmented finance reporting and forecasting**.

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3. The proposed Fabric solution

The use case suggests using **Microsoft Fabric** as the backbone:

1. **Integrate all data sources into OneLake**
   - OneLake = the central data lake in Fabric.
   - All finance-relevant data from ERP, GL, billing, CRM, etc. is landed there.

    - This removes fragmentation: *"many systems → one lake"*.
2. **Data Warehouse for structured finance data**
    - On top of OneLake, you build a **structured Warehouse**.
    - This is where you design a proper **finance star schema**:
        - Fact tables: GL transactions, revenue, cash flows, forecasts.
        - Dimension tables: Accounts, Entities, Cost Centers, Customers, Date, Scenario.
    - This warehouse becomes the **single source of truth** for finance.
3. **Dataflows for automated loading**
    - Instead of finance exporting CSV/Excel manually:
        - **Dataflows Gen2** are set up to pull data automatically from source systems.
        - They run on a schedule (daily, hourly, etc.).
    - Result: no more copy-paste; data refresh is automated.
4. **Power BI for CFO dashboards**
    - On top of the Warehouse, you build:
        - **CFO dashboards** with P&L, cash flow, liquidity views.
        - FP&A views: Actual vs Budget vs Forecast, variance analysis.
    - Power BI uses the warehouse model to create:
        - Interactive dashboards
        - Drill-down by entity, region, business line, etc.

So the **technical story** is:
Sources → OneLake → Fabric Warehouse → Semantic Model → Power BI dashboards.

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4. The outcomes (why a client should care)

This architecture aims to deliver:

1. ✓ **Faster month-end close**
    - Data is already integrated and structured.
    - Less manual Excel work = fewer errors = shorter closing time.
2. ✓ **Automated revenue reporting**
    - Revenue by customer, product, entity, etc. is updated automatically via Dataflows.
    - Power BI dashboards replace manual Excel reports.
3. ✓ **Improved forecasting accuracy**
    - Because all historical data is unified and clean, FP&A can:
        - Compare Actual vs Budget vs Forecast easily.
        - Build better models (even advanced forecasting later).
    - Less time spent preparing data, more time analysing and adjusting forecasts.

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5. How this connects to your role (data analyst building a demo)

For you, as the data analyst building a demo, this use case means:

- **You simulate**:
  - Multiple sources (ERP/GL, billing, CRM) feeding into OneLake.
  - A **finance warehouse model** (Fact + Dimensions).
  - Automated refresh (via Dataflows or scheduled refresh).
- **You implement**:
  - A Power BI report that shows:
    - P&L summary (Revenue, COGS, Gross Margin, maybe Net Profit).
    - Cash / liquidity KPI (even in a simplified way).
    - Actual vs Budget vs Forecast with variance.