SALES REPORT

Business Requirement Document

Abstract

The Business Requirement Document (BRD) for the Sales Report for Elite Retails outlines the essential needs and specifications for creating a comprehensive sales report system. This report will provide detailed insights into sales performance, including metrics such as total sales, sales by product category, regional sales distribution, and sales trends over time. The objective is to enable Elite Retails to make data-driven decisions, enhance sales strategies, and improve overall business performance.

Elite Retails

1. Introduction

The Business Requirement Document (BRD) for the Sales Report for Elite Retails outlines the essential needs and specifications for creating a comprehensive sales report system. This report will provide detailed insights into sales performance, including metrics such as total sales, sales by product category, regional sales distribution, and sales trends over time. The objective is to enable Elite Retails to make data-driven decisions, enhance sales strategies, and improve overall business performance.

2. Data Sources

Assemble a sales report with different visuals to best show the Sales Insights in one page Dashboard. Feel free to use your imagination to best represent the data you have available.

- A. Sales (folder by year)
- B. Categories (Excel)
- C. Geography (Excel)
- D. Product (CSV / Database)
- E. SalesRep (Excel)
- F. SubCategories (Excel)

Data Flow Requirement:

Create a mechanism to load all the files from the sales folder in a single Sales fact table.

The mechanism needs to be resilient as:

- removing a file from the sales folder does not create an error for missing files.

- adding a new yearly sales file will automatically be loaded in the fact query upon refresh.

3. Data Modelling:

Transformations:

Do the respective transformations to the Sales fact table in order to split the Country form the City in field "Location". Make sure you set up the correct Data Type to allow Geo maps.

Do the necessary updates in the Date field to make sure you can setup the Date format.

Unique Key:

Create unique key (GeoKey) in Sales and Geography table

Transformation 2:

The Dimensional queries SalesRep and Sub Category need additional treatment.

Some ID columns have the following format:

Create a small function that removes the "ID - " part of these columns that you can invoke and reuse for these two queries to clean the IDs.

Data Modelling:

Create the Data Model connecting all tables and using the Calendar table already set up in the pbix.

3. DAX

Calculations 3.1:

Calculate Total Revenue in Sales table, using the Product's Retail Price, and multiplying it by the Units.

Calculations 3.2:

Calculate Total Cost in Sales table, using the Product's Standard Cost, and multiplying it by the Units.

Calculations 3.3:

Calculate Gross Profit in Sales: Total Revenue – Total Cost

Calculations 3.4:

Calculate a Gross profit MoM growth Change% measure that could benefit us in decision making

Calculations 3.5:

Calculate a measure for AVG sales per day – this is the average sum of Total Revenue per day based on the Dates of actual Sales.

Calculations 3.7:

- Breakdown Analysis by Product (drop or increase)

Calculate the following time measures:

- This is QBR Report. So QoQ Growth is required

4. Other Calculations

Use the measures and calculations to assemble a sales reports with different visuals to best show the Sales Insights in one page Dashboard. Feel free to use your imagination to best represent the data you have available.

If you plot Month on x-axis, make sure the months are sorted from Jan-Dec.

5. Visual Requirement

The sales report for Elite Retails will include the following visual elements:

Sales Overview Dashboard:

An interactive dashboard showcasing key performance indicators (KPIs) such as total sales, average sales per day, and sales growth rate.

Sales by Product Category:

Bar charts and pie charts displaying sales distribution across different product categories.

Regional Sales Distribution:

Heat maps and geographic charts illustrating sales performance across various regions.

Sales Trends:

Line graphs depicting sales trends over time, highlighting peak periods and seasonal variations.

Top-Selling Products:

Tables and bar charts listing top-selling products and their contribution to total sales. These visualizations will ensure that the sales data is presented in a clear, concise, and easily interpretable manner, facilitating better decision-making and strategy formulation.

6. User and Security Requirement

Users:

The primary users of the sales report will include sales managers, regional directors, and executive leadership. Additionally, marketing teams and financial analysts may also access the report for insights and strategic planning.

Security Requirements:

To ensure data security and privacy, the sales report system will implement role-based access control (RBAC). Only authorized personnel will have access to sensitive sales data. The system will also incorporate data encryption, both at rest and in transit, to protect against unauthorized access. Regular audits and monitoring will be conducted to detect and address any security breaches.

These measures will ensure that the sales report system is secure, maintaining the confidentiality and integrity of Elite Retails' sales data while providing necessary access to authorized users.