======================================= Business Report ========================================

Steven - Sales Manager:

Hi Ali!

I hope you are doing well. We need to improve our internet sales reports and want to move from

static reports to visual dashboard.

Essentially, we want to focus it on how much we have sold of what product, to which clients and

how it has been over time.

Seeing as each sales person works on different products and customers it would be beneficial to be

able to filter them also.

We measure our numbers against budget so i added that in a spreadsheet so we can compare our values against performance.

‘The budget is for 2021 and we usually look 2 years back in time when we do analysis of sales.

Let me know if you need anything else!

Steven

=========================== Business Demand Overview & User Stories ===========================

- Reporter: Steven - Sales Manager

- Value Of Change: Visual dashboard and improved sales reporting or follow up for sales force

- Necessary Systems: Power BI, CRM System

- Other Relevant Info?: Budgets have 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 sells the best | A Power BI dashboard which update data once a day |
| 2 | Sales Representative | A detailed overview of internet sales per customer | Can follow up my customers that buy the most and who can sells the most | A Power BI dashboard which allow me to filter data for each customers |
| 3 | Sales Representative | A detailed overview of internet sales per Products | Can follow up my products that sells the most | A Power BI dashboard which allow me to filter data for each product |
| 4 | Sales Manager | A dashboard overview of internet sales | Follow sales over time against budget | A Power BI dashboard with graphs and KPIs comparing against budget |