HDFC FUNCTIONAL REQUIREMENTS DOCUMENT (FRD)

1. Project Title

HDFC Bank Business Performance Dashboards

2. Dashboard Sections

Section	Description
Customer Insights Dashboard	Displays customer demographics, account balances, and customer distribution across cities and customer types. Helps identify key customer segments and regional spread.
Branch Performance Dashboard	Shows top-performing branches, region-wise profit, and income vs cost trend. Focuses on profitability and regional performance analysis.
Transaction & Investment Dashboard	Analyzes total transactions, investment distribution by age group and type, and transaction trends by date. Provides insights into banking and investment activity.

3. Data Requirements

Dashboard Section	Data Fields Needed	Source
Overview (All Dashboards)	Customer ID, Branch ID, Transaction Date, Region, City	Excel (HDFC Bank Dataset)
Customer Insights Dashboard	Customer ID, Customer Type, Age, City, Account Balance, Account Type	Excel Sheet 1
Branch Performance Dashboard	Branch ID, City, Region, Profit, Expense, Revenue, Month of Transaction	Excel Sheet 2
Transaction & Investment Dashboard	Transaction ID, Transaction Date, Investment Type, Investment Amount, Account Type, Age Group	Excel Sheet 3

4. Filters / Slicers

Users can interact with the following filters:

- Year / Month of Transaction
- Customer Type (Business, Employee, Individual)
- Top N Branches (Parameter Filter)

5. Visuals / Charts

Dashboard Section	Visual Type(s)
Customer Insights	KPI Cards (Total Customers, Avg Balance), Pie Chart (Customer Type), Map (Customer by City), Bar Chart (Age Distribution), Treemap (Balance by Customer Type)
Branch Performance	Bar Chart (Top 10 Branches), KPI Cards (Revenue, Expense, Profit), Donut Chart (Region vs Profit), Map (City vs Profit), Combo Chart (Income vs Cost Trend), Parameter (Top N Branches)
Transaction & Investment	KPI Cards (Total Transactions, Investment, Avg Value), Bar Chart (Investment by Age Group), Bar Chart (Investment by Type), Donut Chart (Balance by Account Type), Line Chart (Transaction by Date), Filters (Customer Type, Year)

6. Interactivity

- Dynamic Filters: Year, Customer Type
- Parameter Controls: To view Top N Branches (e.g., Top 10, Top 20, etc.)
- Dashboard Navigation Buttons: Between Customer, Branch, and Investment dashboards
- Cross-Filtering: Selecting a customer type or region updates related charts
- Tooltips: Show extra data (revenue, profit, % contribution) on hover

7. Calculations / Measures

Calculation Name	Formula (Tableau Expression)	Purpose
Top Branches	IF RANK(SUM([Revenue])) <= [Top N] THEN "Top" ELSE "Others" END	Identify top-performing branches
Profit Margin	(SUM([Revenue]) - SUM([Expense])) / SUM([Revenue]) * 100	Measure branch profitability
Average Transaction Value	SUM([Transaction Amount]) / COUNT([Transaction ID])	Track average value per transaction
Business Customers %	COUNT(IF [Customer Type]="Business" THEN [Customer ID] END) / COUNTD([Customer ID]) * 100	Show share of business customers
Year Filter (from Month)	DATETRUNC('year',[Transaction Date])	Group monthly data into years
Investment by Age Group	IF [Age] <= 25 THEN "18-25" ELSEIF [Age] <= 35 THEN "26-35" ELSEIF [Age] <= 45 THEN "36-45" ELSE "46+" END	Categorize investments by age groups

8. Notes / Special Instructions

- All dashboards follow a consistent black-blue theme for visual alignment.
- Currency formatting used as “₹” for all amounts.
- Data sourced from Excel sheets within one workbook (multiple tabs).
- Dashboards optimized for Tableau Public Desktop Edition.
- Each sheet linked through common fields (Customer ID, Branch ID, Transaction Date) for blending and filtering.