

# Business Requirements Document (BRD) for Excel Pivot & Dashboarding

## 1. Project Overview

The objective is to build an **interactive Excel Pivot Table and Dashboard** that helps analyze customer purchase patterns, spending habits, and transaction trends. The dashboard will provide insights into sales performance, payment preferences, and location-based spending.

## 2. Scope

- Develop an **Excel Pivot Table** to summarize and filter transaction data.
- Create a **dynamic dashboard** with key visualizations.
- Identify trends in customer spending and transaction behaviors.

## 3. Data Source

The dataset consists of the following fields:

- **Customer ID** – Unique identifier for customers.
- **Category** – Type of item purchased (e.g., Groceries, Electronics, Clothing).
- **Item** – Specific product name.
- **Quantity** – Number of units purchased.
- **Price Per Unit** – Cost per item.
- **Total Spent** – Total amount spent (Quantity × Price Per Unit).
- **Payment Method** – Mode of payment (Credit Card, Debit Card, Mobile App, etc.).
- **Location** – Purchase channel (Online, Mobile App, In-Store).
- **Transaction Date** – Date of purchase.

## 4. Requirements

### 4.1 Functional Requirements

#### Pivot Table

- Summarize data by **Customer ID**, **Category**, **Item**, and **Location**.
- Calculate **total sales**, **average spending per customer**, and **transaction count**.
- Filter by **Payment Method** and **Transaction Date**.
- Enable grouping by **Category** and **Location**.

## Dashboard Features

- **Total Revenue Overview** – Display total amount spent.
- **Top Categories by Sales** – Bar chart for highest-selling categories.
- **Customer Spending Trends** – Line chart showing spending over time.
- **Location-Based Transactions** – Pie chart for in-store vs. online purchases.
- **Payment Method Preference** – Breakdown of different payment methods used.
- **Top Customers** – Table showing high-spending customers.

## 4.2 Non-Functional Requirements

- User-friendly dashboard with **interactive filters**.
- **Dynamic data updates** when new transactions are added.
- Optimized **Excel performance** for large datasets.

## 5. Deliverables

- **Excel File** containing:
  - Cleaned and structured dataset.
  - **Pivot Table** with filtering options.
  - **Dashboard** with visualizations and summary insights.

## 6. Success Criteria

- The dashboard effectively visualizes key sales and customer spending trends.
- Users can **filter and explore** data dynamically.
- Pivot tables provide **accurate and actionable insights**.