**Tableau User Story | Sales Performance**

**Introduction:**

This user story outlines the specifications for building two dashboards using tableau to help stakeholders, including sales managers and executives to analyse sales performance and customers.

**Sales Dashboard | Requirements**

**Dashboard Purpose:**

The purpose of sales dashboard is to present an overview of the sales metrics and trends in order to analyse year-over-year sales performance and understand sales trends.

**Key Requirements:**

* KPI Overview:

Display a summary of total sales, profits and quantity for the current year and the previous year.

* Sales Trends:

 – Present the data for each KPI on a monthly basis for both the current year and the previous year.

 – Identify months with highest and lowest sales and make them easy to recognize.

* Product Subcategory Comparison

 – Compare sales performance by different product subcategories for the current year and the previous year.

 – Include a comparison of sales with profit.

* Weekly Trends for Sales & Profit:

 – Present weekly sales and profit data for the current year.

 – Display the average weekly values.

 – Highlight weeks that are above and below the average to draw attention to sales & profit performance.

**Customer Dashboard | Requirements**

**Dashboard Purpose:**

The customer dashboard aims to provide an overview of customer data, trends and behaviours. It will help marketing teams and management to understand customer segments and improve customer satisfaction.

**Key Requirements:**

* KPI Overview:

Display a summary of total number of customers, total sales per customer and total number of orders for the current year and the previous year.

* Customer Trends:

 – Present the data for each KPI on a monthly basis for both the current year and the previous year.

 – Identify months with highest and lowest sales and make them easy to recognize.

* Customer Distribution by Number of Orders

Represent the distribution of customers based on the number of orders they have placed to provide insights into customer behaviour, loyalty and engagement.

* Top 10 Customers by Profit

 – Present the top 10 customers who have generated the highest profits for the company.

 – Show additional information like rank, number of orders, current sales, current profit and the last order date.

**Design & Interactivity Requirements**

**Dashboard Dynamic:**

– The Dashboard should allow users to check historical data by offering them the flexibility to select any desired year.

 – Provide users with the ability to navigate between the dashboards easily.

 – Make the charts and graphs interactive, enabling users to filter data using the charts.

**Data Filters:**

Allow users to filter data by product information like category and subcategory and by location information like region, state and city.