

Sales Dashboard Requirements

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

Key Requirements:

1. KPI Overview:

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

2. Sales Trends:

- Present the data for each KPI on a monthly basis for both the current year and the previous year.
- Identify months with the highest and lowest sales and make them easy to recognize.

3. 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.

4. 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

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

Key Requirements:

1. 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.

2. Customer Trends:

- Present the data for each KPI on a monthly basis for both the current year and the

previous year.

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

3. 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 behavior, loyalty, and engagement.

4. 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.

Dashboard Creation Process

1. Analyse Requirements:

- Collect Requirements
- Choose the Right Charts
- Draw Mockups
- Choose Colors

2. Build The Data Source:

- Connect Data
- Create Data Model
- Rename Fields/Tables
- Check Data Types
- Understand Data

3. Building Charts:

- Create Calculated Fields & Test
- Build Chart
- Format:
 - * Remove Lines & Grids
 - * Clean up Axis & Headers
 - * Coloring
 - * Tooltip

4. Building Dashboard:

- Draw Mockups for Containers
- Build Container Structure
- Put all Charts together
- Format:

- * Distribute Content "Evenly"
- * Format Colors, Sizes, etc.
- * Fit "Entire View"
- * Add Legends
- * Add Spaces (Inner/Outer Padding)
- Add Filters & Make them Dynamic
- Add Icons

KPI

● Above ● Below

▲ 0.00%; ▼ -0.00%;

Colors

#ff5500

#b8b8b8

#1da2d0

#5f5f5f