**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 analyze sales performance and customers.

**Sales Dashboard | Requirements**

**Dashboard Purpose**

The purpose of the sales dashboard is to present an overview of the sales metrics and trends to analyze 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 monthly 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 behaviors. 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 monthly 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 behavior, 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.