

## Budget and Sales Analysis BRD (Business Requirement Document)

### **Problem Statement:-**

The budget and sales analysis aims to evaluate the variance between projected budgets and actual sales figures, identifying key drivers and areas of improvement."

This study investigates the relationship between budget allocation and sales performance, seeking to optimize resource utilization and enhance revenue generation

### **Aims Grid :-**

Create a dashboard so that we can easily draw an insights and make some useful decision such as

1. Create a cards that should contain current year sales (Create a cards in such a way that whenever you update the data it should take the latest year as a current year)

#### **Create a measure on CY Sales in Sales table.**

```
CY Sales = var CY = Max('Date Master'[Year]) return CALCULATE(SUM(Sales[Sales Amount]), 'Date Master'[Year] = CY)
```

2. Create a cards that should contain Previous year sales

#### **Create a measure on PY Sales in Sales table.**

```
PY Sales = CALCULATE([CY Sales],SAMEPERIODLASTYEAR('Date Master'[Date]))
```

3. Create a cards on year YOY Sales growth in percentage so that if the growth is positive make the text color in Green and if the sales is negative change it in to red

#### **Create a measure on YoY Sales in Sales table.**

```
YoY Sales growth % = DIVIDE([CY Sales] - [PY Sales],[PY Sales])
```

4. Create a cards on Budgeted Sales

#### **Create a measure on Budgeted Sales in Sales table.**

```
Budgeted sales = var CY = max('Date Master'[Year]) return CALCULATE(sum(Budget[Budgeted Amt]), 'Date Master'[Year] = CY)
```

5. Create a cards on Budget variance in percentage so that if the growth is positive make the text color in Green and if the sales is negative change it in to red

#### **Create a measure on Budget Variance % in Sales table.**

```
Budget Variance % = DIVIDE([CY Sales] - [Budgeted sales],[Budgeted sales])
```

6. Create a donut chart for Current year sales by category
7. Create a scatterplot for Current year sales and YOY Sales growth by Product Name
8. Create Area chart for Current year sales and previous year sales and budgeted sales by Month name
9. Create a Forecast for current year sales by date

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10. Create a matrix that should contain Category and product name wise Current year Sales, Previous Year Sales, YOY Sales Growth %, Budgeted Sales, Budget Variance % with icon, so if we have positive growth the Green and upward direction neutral yellow and loss red with down direction