

Timothy - Sales Manager

Hi James!

I hope you are doing well. We need to improve our **internet sales reports** and want to move from static reports to **visual dashboards**.

Essentially, we want to focus on how much we have **sold of what products**, to **which clients** and how **it has been over time**.

Seeing as each **sales person** works on different products and customers it would be beneficial to be able to **filter them also**.

We measure our **numbers against budget** so I added that in a **spreadsheet** so we can compare our values against performance.

The budget is for 2023 and we usually look **2 years back** in time when we do analysis of sales.

Let me know if you need anything else!

//Timothy

Business Demand Overview:

- Reporter: Timothy - Sales Manager
- Value of Change: Visual dashboards and improved Sales reporting
- Necessary Systems: Power BI, CRM System, MS SQL Server
- Budget Spreadsheet: Delivered in Excel for 2023

No. #	As a (role)	I want (request)	So that I (User Value)	Acceptance Criteria
1	Sales Manager	To get a dashboard overview of internet sales	Can follow better which customers and product sells the best	A Power BI dashboard which shows historical sales info
2	Sales Rep.	A detailed overview of Internet Sales per Customers	Can follow up my customers that buys the most and who we can sell more to	A Power BI dashboard which allows me to filter data for each Customer
3	Sales Rep.	A detailed overview of Internet Sales per Products	Can follow up with my Products that sells the most	A Power BI dashboard which allows me to filter data for each Product
4	Sales Manager	To get a dashboard overview of internet sales	Follow sales over time against budget	A Power BI dashboard with graphs and KPIs comparing against budget