

Subject: Enhancing Sales Reporting with Visual Dashboards

Dear Mono,

I hope this message finds you well.

We are looking to improve our **internet sales reporting** by transitioning from static reports to more dynamic and interactive **visual dashboards**. The aim is to have a clear view of:

- **Product performance:** How much we have sold of each product.
- **Client insights:** Which **clients** have purchased these **products**?
- **Trends over time:** How sales have evolved historically.

Given that each salesperson works with distinct products and clients, it would be highly beneficial to incorporate filters for customized views.

Additionally, since we measure our performance against **budget**, I've included a **spreadsheet** with budget data for 2021 to enable comparisons. For our analysis, we typically review sales data over the **past two years**.

Please let me know if you need any further information or support to proceed. I look forward to hearing your thoughts.

Best regards,
Bosch

Sales Report (numbers) – Fact Table

Products – Dimension Table

Budget - Fact Table

Business Demand Overview:

- Reporter - Bosch
- Value of changes: Visual Dashboard and improved Sales reporting or follow up for sales.
- Necessary systems: Power BI, CRM system
- Other relevant info: Budget have been delivered in Excel for 2021

User Stories:

No #	As a (role)	I want (request / demand)	So that I (user value)	Acceptance Criteria
1.	Sales Manager	To get a dashboard overview of internet sales.	Can follow better which customers and products sells the best.	A Power BI dashboard which updates data once a day.
2.	Sales Representative	A detailed overview of Internet Sales per Customers.	Can follow up my customers that buy the most and who we can sell more too.	A Power BI dashboard which allows me to filter data for each customer.
3.	Sales Representative	A detailed overview of Internet Sales per Product.	Can follow up my Product that buys the most.	A Power BI dashboard which allows me to filter data for each Product.
4.	Sales Manager	A dashboard overview of	Follow sales over time	A Power BI dashboard with

		internet sales.	against budget.	graphs and KPIs comparing against budget.
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I would like to sum something by something (something -> fact table, by something (grouping)
-> dimension table)

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