

Data Collection Checklist & Project Timeline

(Self-operated Retail Dashboard – Power BI Implementation)

PART I – INFORMATION COLLECTION CHECKLIST

KPI & Scope Alignment

English	中文	Pinyin	Required Output
Confirm KPI Definitions	确认指标定义	què rèn zhǐ biāo dìng yì	Written KPI dictionary
Confirm Revenue Logic	确认收入口径	què rèn shōu rù kǒu jìng	GMV vs Net Revenue clarified
Confirm Cost Logic	确认成本口径	què rèn chéng běn kǒu jìng	COGS source validated
Confirm Time Granularity	确认时间维度	què rèn shí jiān wéi dù	Daily / Weekly / Monthly

Owner: Finance + Sales

Sales Data (Revenue Layer)

English	中文	Pinyin	Source
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Paid Orders	支付单量	zhī fù dān liàng	ERP / POS
GMV	支付金额	zhī fù jīn é	ERP
Net Revenue	成交金额	chéng jiāo jīn é	Finance
ASP	支付ASP	zhī fù A S P	Calculated
Channel Mapping	渠道映射	qú dào yìng shè	Sales

Checklist:

- ☐ 12–24 months historical data
- ☐ SKU & SPU mapping clean
- ☐ Refund & cancellation logic included



3 Cost Data (COGS Layer)

English	中文	Pinyin
Unit Cost	单台成本	dān tái chéng běn
Purchase Price	采购价	cǎi gòu jià
Rebate	返利	fǎn lì

Checklist:

- ☐ Cost update frequency confirmed
- ☐ Cost allocation rule documented
- ☐ Finance reconciliation completed

4 Expense Data (Operating Layer)

English	中文	Pinyin
Marketing Expense	市场费用	shì chǎng fèi yòng
Logistics Expense	物流费用	wù liú fèi yòng
Channel Fee	渠道费用	qú dào fèi yòng
HR Expense	人工费用	rén gōng fèi yòng

Checklist:

- ☐ Monthly expense summary provided
- ☐ Allocation rule per channel defined
- ☐ Expense ratio (费用率) formula confirmed

5 Data Model Validation

English	中文	Pinyin
Fact Tables	事实表	shì shí biǎo
Dimension Tables	维度表	wéi dù biǎo
Star Schema	星型模型	xīng xíng mó xíng

Checklist:

- ☐ Dim_Date, Dim_Product, Dim_Channel validated
- ☐ No duplicate SKU codes
- ☐ Revenue = Finance Report



PART II – PROJECT TIMELINE

Phase 1 – Requirement & KPI Lock

需求确认阶段 (xū qiú què rèn jiē duàn)

Duration: Week 1

Deliverables:

- KPI definition document
 - Data source list
 - Governance owner assignment
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Phase 2 – Data Collection & Cleaning

数据收集与清洗 (shù jù shōu jí yǔ qīng xǐ)

Duration: Week 2–3

Deliverables:

- Cleaned historical dataset
 - Mapping files
 - Reconciliation report
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Phase 3 – Data Modeling & BI Development

数据建模与报表开发 (shù jù jiàn mó yǔ bào biǎo kāi fā)

Duration: Week 4–5

Deliverables:

- Star schema model
 - KPI calculations
 - Dashboard prototype
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Phase 4 – Validation & UAT

验证与用户测试 (yàn zhèng yǔ yòng hù cè shì)

Duration: Week 6

Deliverables:

- Finance sign-off
 - User acceptance approval
 - Data accuracy confirmation
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Phase 5 – Go Live & Governance Setup

上线与数据治理 (shàng xiàn yǔ shù jù zhì lǐ)

Duration: Week 7

Deliverables:

- Automated refresh
- Owner responsibility matrix
- Monthly reconciliation SOP