



Data Collection Checklist & Project Timeline

(Self-operated Retail Dashboard – Power BI Implementation)



PART I – INFORMATION COLLECTION CHECKLIST

1 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

2 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
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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
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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

July
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PART II – PROJECT TIMELINE

Phase 1 – Requirement & KPI Lock

需求确认阶段 (xū qíu què rèn jiē duàn)

Duration: Week 1

Deliverables:

- KPI definition document
- Data source list
- Governance owner assignment

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

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