

Steven - Sales Manager:

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 it 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 2022 and we usually look 2 years back in time when we do analysis of sales.

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Steven - Gerente de Ventas:

Espero que estés bien. Necesitamos mejorar nuestros informes de ventas por Internet y queremos pasar de informes estáticos a paneles visuales.

Básicamente, queremos enfocarnos en cuánto hemos vendido de qué productos, a qué clientes y cómo ha sido a lo largo del tiempo.

Dado que cada persona de ventas trabaja con diferentes productos y clientes, sería beneficioso poder filtrarlos también.

Medimos nuestros números en comparación con el presupuesto, así que agregué eso en una hoja de cálculo para que podamos comparar nuestros valores con el rendimiento.

El presupuesto es para 2022 y generalmente miramos dos años atrás en el tiempo cuando hacemos análisis de ventas.

#### **Business Demand Overview:**

- Reporter: Steven – Sales Manager.
- Value of Change: Visual dashboards and improved Sales reporting or follow up or sales force.
- Necessary Systems: Power BI, CRM System.
- Other Relevant Info: Budgets have been delivered in Excel for 2022.

**User Stories:**

<b>No #</b>	<b>As a (role)</b>	<b>I want (request / demand)</b>	<b>So that I (user value)</b>	<b>Acceptance Criteria</b>
<b>1</b>	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
<b>2</b>	Sales Representative	A detailed overview of Internet Sales per Customers	Can follow up my customers that buys the most and who we can sell ore to	A Power BI dashboard which allows me to filter data for each customer
<b>3</b>	Sales Representative	A detailed overview of Internet Sales per Products	Can follow up my Products that sells the most	A Power BI dashboard which allows me to filter data for each Product
<b>4</b>	Sales Manager	A dashboard overview of internet sales	Follow sales over time against budget	A Power Bi dashboard with graphs and KPIs comparing against budget.