Sales and Customer Dashboard Document

Overview

Purpose:
Dashboard overview and primary purpose (context, business questions/problems addressed), as well as the target audience.

Data Sources

Source/s:
Mention and reference the data sources used for the dashboard.

Data Extraction Process:
Describe the process used for extracting the data, including any ETL (Extract, Transform, Load) processes or tools used.

Data Wrangling

Data Cleaning:
Describe any data cleaning steps taken to prepare the data for analysis, such as handling missing/null values, removing duplicates, and correcting errors.

Data Transformation:
Describe any transformations applied to the data, including sorting, filtering ,aggregations and pivots.

Dashboard Structure

Layout:
Describe the overall layout of the dashboard, including the arrangement of elements such as charts, tables, filters and other elements.

Key Performance Indicators (KPIs):
List the KPIs displayed on the dashboard and include the definitions and calculation method used.

Filters and Parameters:
Describe the filters and parameters available on the dashboard and their purpose.

Navigation:
Describe any navigation features, such as buttons or links, that allow users to move between different sections or dashboards.

Visualisations

Chart Types:
Describe each chart and visualisation used in the dashboard, including the data it displays and its purpose within the overall context of the task and dashboard.

Interaction Features:
Describe any interactive features, such as action filters, tooltips and drill-downs, and explain the purpose where required.

Usage Instructions

Accessing the Dashboard:
Provide instructions for accessing the dashboard, including any required credentials or permissions/authorisations.

Using Filters and Parameters:
Explain how to use the filters and parameters should be used optimally to display the required data.

Interpreting the Data:
Provide guidance on how to interpret the data presented in the dashboard.

Error Handling:
Provide instructions for handling errors or common issues with the dashboard, including who to contact for support.

Maintenance and Updates

Data Refreshing Schedule:
Mention the schedule for data refreshing, including the frequency and timing of updates.

Appendix

Glossary:
Define any technical terms or abbreviations used in the documentation.

References:
List any references or additional resources related to the dashboard or the data it uses.

Contact Information:
Provide contact information for the dashboard owner or support team.

Security and Access

User Permissions:
Specify who has access to the dashboard and the level of access (view, edit, etc.).

Data Security:
Describe any measures in place to ensure data security and privacy.

Revision History

Version Control:
 Maintain a log of changes made to the dashboard, including dates, descriptions of changes, and responsible parties.