# # Power BI Migration Requirements Document

This report analyzes key metrics across three order types for online transactions, tracking sales growth versus prior periods (month/year) and target performance (orders & invoices). Key KPIs include average order value, pickup rate, and return rate, providing insights into customer behavior, operational efficiency, and product satisfaction. The dashboard highlights trends and opportunities for business improvement.

Project: Tableau to Power BI Migration – Sales Performance Metrics

Author: [Your Name]

Date: [Current Date]

Stakeholders: Business Analysts, Sales Team, Data Engineering

1. Project Overview

Migrate existing Tableau sales performance dashboards to Power BI, ensuring data accuracy, improved performance, and enhanced visualization capabilities.

# Key Objectives:

✅ Rebuild 15 critical sales metrics from Tableau in Power BI

✅ Optimize data model for faster load times

✅ Implement interactive filtering and drill-down capabilities

✅ Ensure seamless integration with existing data sources

2. Metrics to be Migrated

|  |  |  |  |
| --- | --- | --- | --- |
| **Metric Name** | **Description** | **Data Source** | **Priority** |
| **Avg Order Value** | Average revenue per order (Total Sales / Order Count) | SQL Server | High |
| **Avg Order Value Detail** | Breakdown by product/category/region | SQL Server | Medium |
| **Invoice Sales vs Target** | Comparison of actual invoice sales to quarterly targets | Excel/SharePoint | High |
| **Order Sales vs Target** | Comparison of order-based sales to targets | Excel/SharePoint | High |
| **Pickup Rate** | % of orders picked up vs total orders | SQL Server | High |
| **Pickup Rate Detail** | Breakdown by location/customer tier | SQL Server | Medium |
| **Return Rate** | % of orders returned | SQL Server | High |
| **Return Rate Detail** | Reasons for returns (defective, wrong item, etc.) | SQL Server | Medium |
| **Target Invoice Sales** | Quarterly/Monthly invoice sales targets | SharePoint | High |
| **Target Order Sales** | Quarterly/Monthly order volume targets | SharePoint | High |
| **Total Invoice Sales** | Gross invoice sales (before returns) | SQL Server | High |
| **Total Order Sales** | Gross order sales (before cancellations) | SQL Server | High |
| **Total Order Sales Detail** | Breakdown by product line, region, sales rep | SQL Server | Medium |
| **Total Orders** | Count of all orders placed | SQL Server | High |
| **Total Orders Detail** | Trends by day/week/month, customer segment | SQL Server | Medium |
| **Total Return Sales** | Total value of returned orders | SQL Server | High |

3. Technical Requirements

# Data Model

- Star Schema Design:

- Fact Tables: `Sales`, `Returns`, `Targets`

- Dimension Tables: `Date`, `Product`, `Customer`, `Region`, `Employee`

- Performance Optimization:

- Incremental refresh for large tables (`Invoice Sales` and `Order Sales`)

- Aggregations for summary-level metrics

# Visualizations

|  |  |  |
| --- | --- | --- |
| **Metric** | **Visual Type** | **Interactivity** |
| Sales vs Targets | Combo chart (Line + Column) | Drill-down by region/quarter |
| Return Rate | Donut chart + Trend line | Filter by return reason |
| Avg Order Value | Card + Bar chart | Slice by product category |

# User Experience

- Hierarchy Filters: Division> DC Name > DC Store Num

Level1 Hierarchy Desc>Level2 Hierarchy Desc>Level3 Hierarchy Desc>Level4 Hierarchy Desc>SKU Code

- Tooltips: Detailed metrics on hover (e.g., `Avg Order Value` breakdown)

4. Migration Steps

1. Data Validation

- Verify Tableau SQL queries vs. Power BI data model

- Reconcile discrepancies with business teams

2. Power BI Development

- Build data model in Power Query

- Implement DAX measures with documentation

3. Testing

- QA: Compare Power BI outputs with Tableau dashboards

- UAT sign-off from sales/finance teams

4. Deployment

- Publish to Power BI Service

- Configure scheduled refreshes

5. Success Criteria

- Accuracy: 99.8% match with Tableau metrics

- Variance margin: 0.02% Due to business logic change and timing issues observed across.

- Performance: Dashboards load in <5 seconds

- Adoption: 90% of users transitioned in 30 days

Approval:

|  |  |  |
| --- | --- | --- |
| **Role** | **Name** | **Sign/Date** |
| Project Manager | Vijay Rathi | 07/21/2025 |
| Sales Lead | John Smith | 07/14/2025 |