Process Definition Document: Sales Report

Contents

1 Introduction

1.1 Document purpose

The Process Definition Document is used for summarizing the process. It describes the sequence of executed actions, conditions, and process rules before automation. It aims to clarify how it is performed manually by the user on a click-by-click level, as well as how to handle the possible business exceptions that may occur.

1.2 Objective

The sales history data is stored in a legacy system that does not provide an API to access it. Moreover, the user interface is not friendly enough to allow easy data extraction and analysis, which makes this process highly time-consuming.

The objective of this process is to gather the previous month's sales data and group it by role, seller, product, and client to create a monthly report for the finance team to use in their analysis.

Additionally, the top seller of each week of the month is extracted to calculate a bonus.

1.3 Automation pre-requisites

To automate the sales reporting process, the digital worker must have:

- A created account in the RPA Showcase web application.

2 Process description (As Is)

Currently, the sales department gathers data from the sales history table and creates a report to analyze the month's sales behavior. That is to say, who is the client that generates the most income for the company, the performance of each of the sales-team members, what are the most sold products, calculate performance bonuses, etc.

This process is done manually on the first day of each month (or the next closest business day) to collect the previous month's data.

The report is an Excel workbook that should contain the following sheets:

- **By Role**: Contains an ordered table of all the roles of the sales team members and the amount they sold during the month.
- **By Product**: Contains an ordered table of all the products sold during the month (how many items were sold of each product, and the total amount raised).
- **By Seller**: Has an ordered table of all the sellers, their names, id, role, and the total sold amount during the month. As a side note, there might be repeated seller names, but the id is always unique.
- **By Client**: Contains an ordered table of all the clients and the total amount sold to each of them.

- **Weekly Bonus**: Is used to know the winners of the weekly bonus. Calculate the seller with the highest sold amount from days 1-8, 9-15, 16-23, and 24-31. It should include a table with the week number (1,2,3,4), the seller's name, id, role, and sold amount.

All the tables must be sorted in descending order using the amount as the only criterion. The "By Role" sheet should also include a pie chart, the rest of the sheets, except for the "Weekly Bonus," should contain a column chart to describe the data.

2.1 PROCESS SUMMARY

Element	Description
Department	Sales
Description	Collect the previous month sales information and create an Excel report for the finance team to use it.
Execution schedule	On the first day of the month or the next closest business day
Input data	N/A
Output data	Sales report as an Excel sheet

2.2 APPLICATIONS USED

The following table includes a complete list of all the applications used during the execution of the automated process.

Application name	Version	Access methods	Comments
RPA Showcase	N/A	User and password provided by the billing team.	Obtain it by creating an account on the RPA Showcase page
Email	N/A	User and password provided by the billing team.	Use any email for development purposes
Excel	N/A	N/A	

2.3 PROCESS MAP

To improve the understanding of the process prior to its automation, this section includes a set of diagrams to provide a high-level and detailed explanation of the steps the sales team follows to perform it.

2.3.1 High-level process map

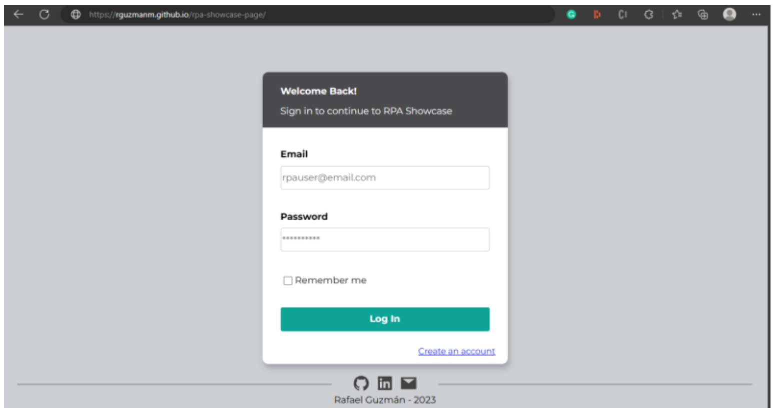
You can find the diagram containing an overview of the process attached in the folder downloaded from the RPA Showcase page or here.

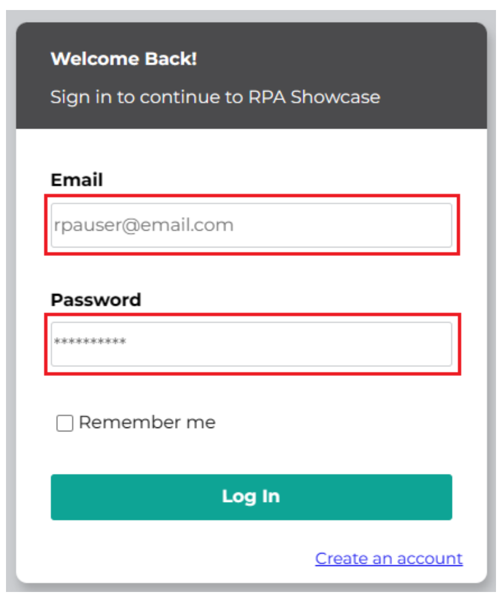
2.3.2 Detailed level process map

You can find the diagram containing the detailed steps to perform the process in the folder downloaded from the RPA Showcase page or here.

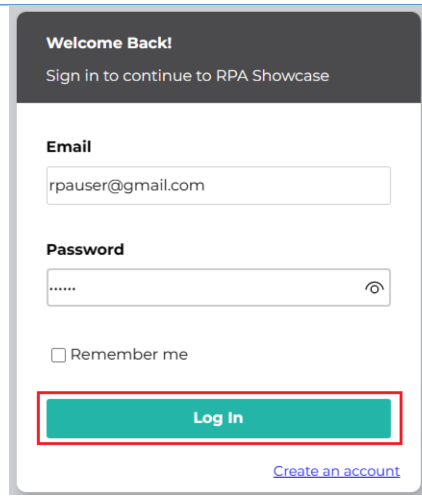
2.4 DETAILED PROCESS ACTIONS

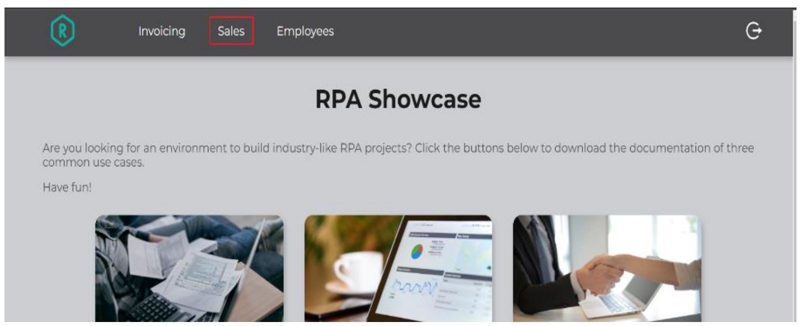
The following table contains the click-by-click process documentation.

<table>
<tr><th>#</th><th>Description</th><th>Screenshot</th><th>Comments</th></tr>
<tr><td>1</td><td>Open the RPA showcase page in a Chrome browser</td><td>


</td><td>Url: https://rguzmanm.github.io/rpa-showcase-page/</td></tr>
<tr><td>2</td><td>Enter the username and password</td><td>


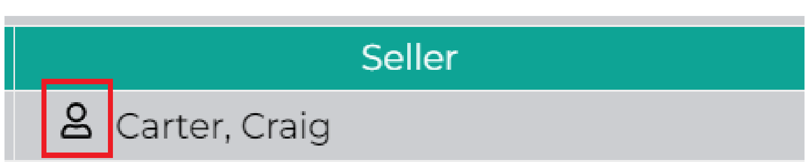
</td><td>Click on the “Create an account” link to get the username and password</td></tr>
<tr><td>3</td><td>Click the “Log In” button</td><td></td><td></td></tr>
</table>

<table>
<tr><td></td><td></td><td>


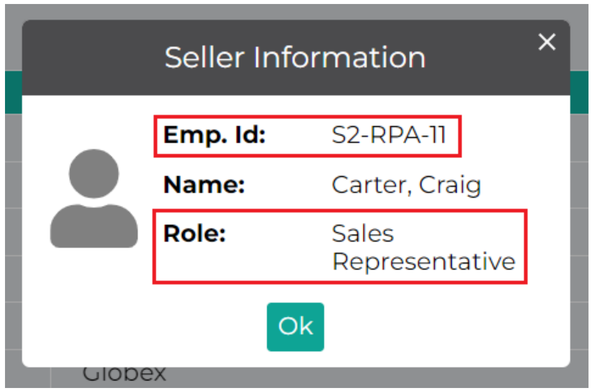
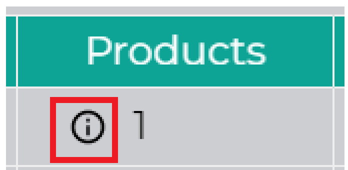
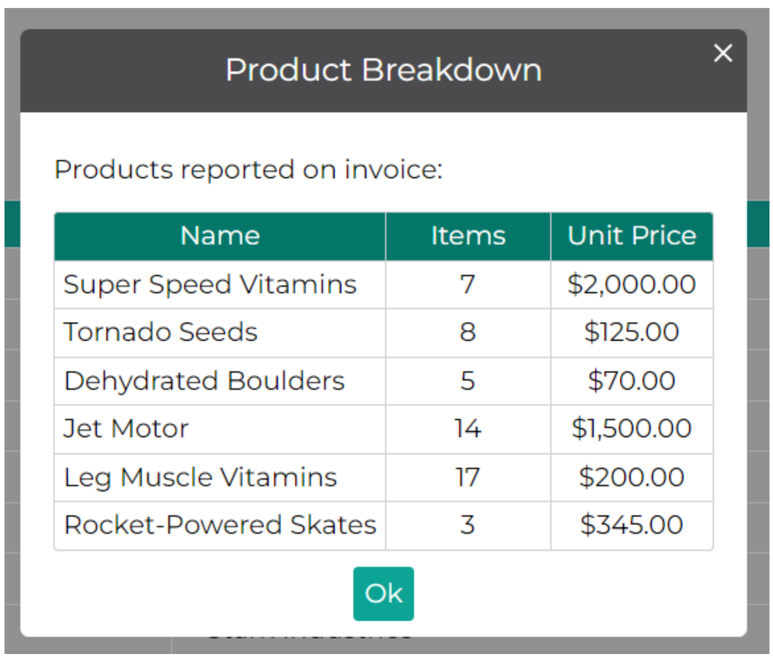
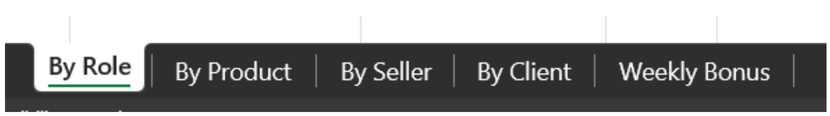
</td><td></td></tr>
<tr><td>4</td><td>Wait for the main page to load and click in the “Sales” option from the top menu</td><td>


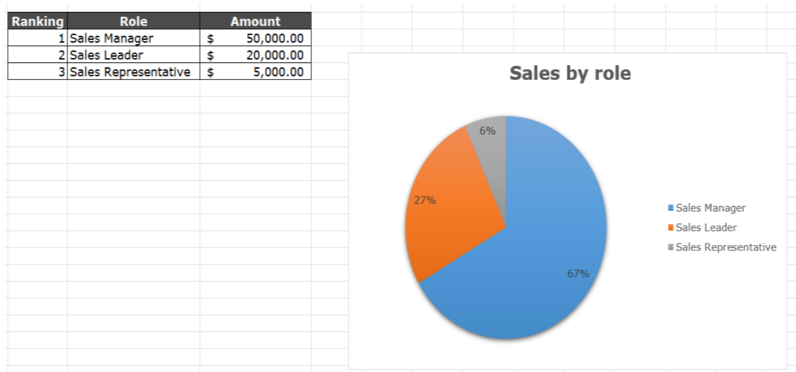
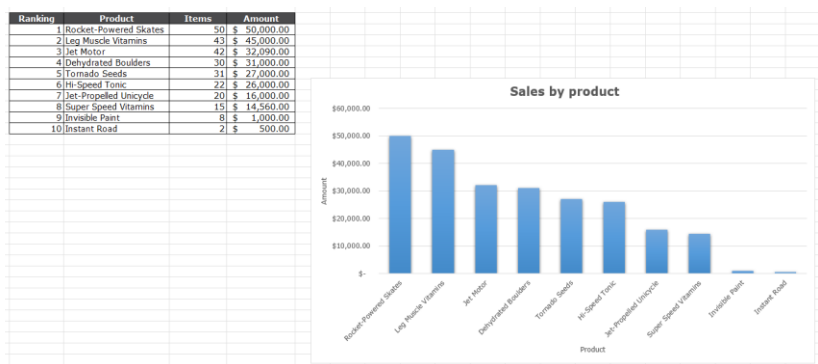
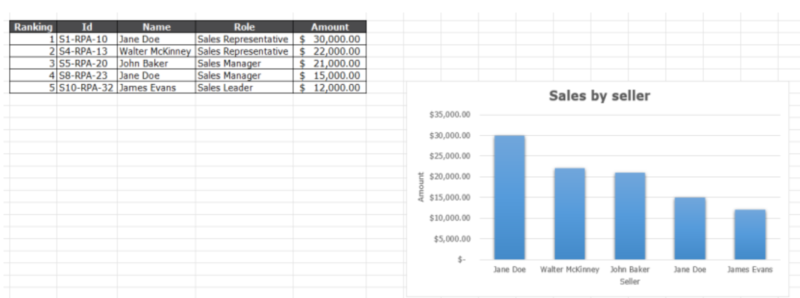
</td><td></td></tr>
<tr><td>5</td><td>For each record in the table collect the date, seller, client, and products information of the previous month</td><td>

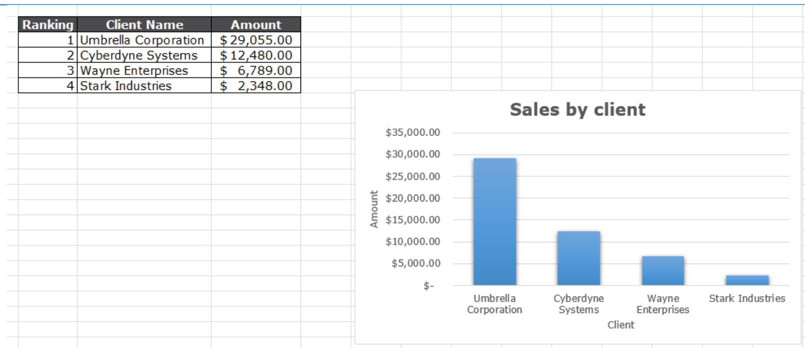
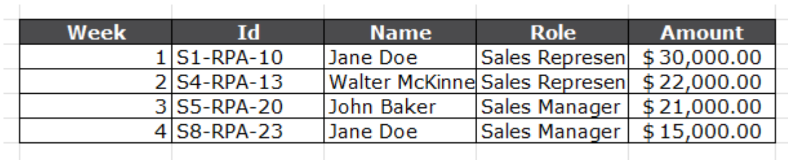
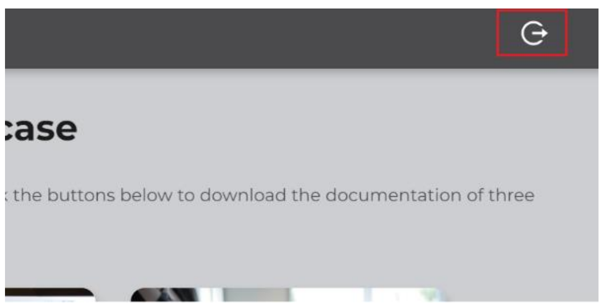
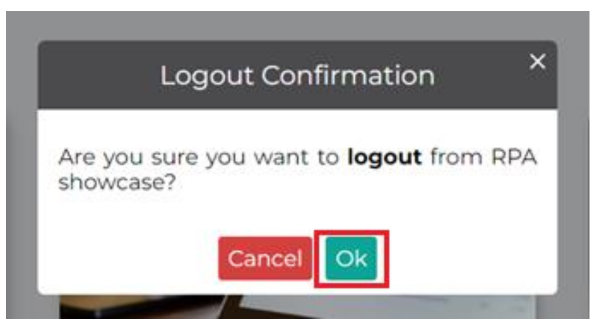

</td><td></td></tr>
<tr><td>5.1</td><td>Retrieve the sale’s date, client, and amount directly from the table</td><td>


</td><td></td></tr>
<tr><td>5.2</td><td>Click the icon next to the seller’s name</td><td>


</td><td></td></tr>
</table>

<table>
<tr><td>5.3</td><td>Retrieve the employee’s ID and role</td><td></td><td></td></tr>
<tr><td>5.4</td><td>Click the icon next to the products count</td><td></td><td></td></tr>
<tr><td>5.5</td><td>Retrieve the products name, items, and price</td><td></td><td></td></tr>
<tr><td>6</td><td>Put the data retrieved on an Excel workbook with the sheets “By Role”, “By Product”, “By Seller”, “By Client”, and</td><td></td><td>The file name must be “Sales Report [Month] [Year].xlsx”</td></tr>
</table>

<table>
<tr><td></td><td>“Weekly Bonus”</td><td></td><td></td></tr>
<tr><td>6.1</td><td>Group the data retrieved by role and create a table, and a pie chart in the “By Role” sheet</td><td>
<table>
<tr><th>Ranking</th><th>Role</th><th>Amount</th></tr>
<tr><td>1</td><td>Sales Manager</td><td>$ 50,000.00</td></tr>
<tr><td>2</td><td>Sales Leader</td><td>$ 20,000.00</td></tr>
<tr><td>3</td><td>Sales Representative</td><td>$ 5,000.00</td></tr>
</table>
</td><td>Add the total amount sold by each role and sort it in descending order.
The table must contain the columns “Ranking”, “Role”, and “Amount”.
The pie chart must contain the percentage of each role in the total monthly sales</td></tr>
<tr><td>6.2</td><td>Group the data retrieved by product and create a table, and a column chart in the “By Role” sheet</td><td>
<table>
<tr><th>Ranking</th><th>Product</th><th>Items</th><th>Amount</th></tr>
<tr><td>1</td><td>Rocket-Powered Skates</td><td>50</td><td>$ 50,000.00</td></tr>
<tr><td>2</td><td>Leg Muscle Vitamins</td><td>43</td><td>$ 45,000.00</td></tr>
<tr><td>3</td><td>Jet Motor</td><td>42</td><td>$ 32,090.00</td></tr>
<tr><td>4</td><td>Dehydrated Boulders</td><td>30</td><td>$ 31,000.00</td></tr>
<tr><td>5</td><td>Tornado Seeds</td><td>31</td><td>$ 27,000.00</td></tr>
<tr><td>6</td><td>Hi-Speed Tonic</td><td>22</td><td>$ 26,000.00</td></tr>
<tr><td>7</td><td>Jet-Propelled Unicycle</td><td>20</td><td>$ 16,000.00</td></tr>
<tr><td>8</td><td>Super Speed Vitamins</td><td>15</td><td>$ 14,560.00</td></tr>
<tr><td>9</td><td>Invisible Paint</td><td>8</td><td>$ 1,000.00</td></tr>
<tr><td>10</td><td>Instant Road</td><td>2</td><td>$ 500.00</td></tr>
</table>
</td><td>Add the total amount sold by product and sort it in descending order.
The table must contain the columns “Ranking”, “Product”, “Items”, and “Amount”.
The “Items” column represents the number of items sold of each product</td></tr>
<tr><td>6.3</td><td>Group the data retrieved by seller and create a table, and a column chart in the “By Seller” sheet</td><td>
<table>
<tr><th>Ranking</th><th>Id</th><th>Name</th><th>Role</th><th>Amount</th></tr>
<tr><td>1</td><td>S1-RPA-10</td><td>Jane Doe</td><td>Sales Representative</td><td>$ 30,000.00</td></tr>
<tr><td>2</td><td>S4-RPA-13</td><td>Walter McKinney</td><td>Sales Representative</td><td>$ 22,000.00</td></tr>
<tr><td>3</td><td>S5-RPA-20</td><td>John Baker</td><td>Sales Manager</td><td>$ 21,000.00</td></tr>
<tr><td>4</td><td>S8-RPA-23</td><td>Jane Doe</td><td>Sales Manager</td><td>$ 15,000.00</td></tr>
<tr><td>5</td><td>S10-RPA-32</td><td>James Evans</td><td>Sales Leader</td><td>$ 12,000.00</td></tr>
</table>
</td><td>Add the total amount sold by each seller and sort it in descending order.
The table must contain the columns “Ranking”, “Id”, “Name”, “Role”, and “Amount”.</td></tr>
<tr><td>6.4</td><td>Group the data retrieved by client and</td><td></td><td>Add the total amount sold to each client and</td></tr>
</table>

<table>
<tr><td></td><td>create a table, and a column chart in the “By Client” sheet</td><td>
<table>
<tr><th>Ranking</th><th>Client Name</th><th>Amount</th></tr>
<tr><td>1</td><td>Umbrella Corporation</td><td>$ 29,055.00</td></tr>
<tr><td>2</td><td>Cyberdyne Systems</td><td>$ 12,480.00</td></tr>
<tr><td>3</td><td>Wayne Enterprises</td><td>$ 6,789.00</td></tr>
<tr><td>4</td><td>Stark Industries</td><td>$ 2,348.00</td></tr>
</table>
</td><td>sort it in descending order.
The table must contain the columns “Ranking”, “Id”, “Name”, “Role”, and “Amount”.</td></tr>
<tr><td>6.5</td><td></td><td>
<table>
<tr><th>Week</th><th>Id</th><th>Name</th><th>Role</th><th>Amount</th></tr>
<tr><td>1</td><td>S1-RPA-10</td><td>Jane Doe</td><td>Sales Represen</td><td>$ 30,000.00</td></tr>
<tr><td>2</td><td>S4-RPA-13</td><td>Walter McKinne</td><td>Sales Represen</td><td>$ 22,000.00</td></tr>
<tr><td>3</td><td>S5-RPA-20</td><td>John Baker</td><td>Sales Manager</td><td>$ 21,000.00</td></tr>
<tr><td>4</td><td>S8-RPA-23</td><td>Jane Doe</td><td>Sales Manager</td><td>$ 15,000.00</td></tr>
</table></td><td></td></tr>
<tr><td>7</td><td>Click the logout button from the RPA Showcase app</td><td>
</td><td></td></tr>
<tr><td>7.1</td><td>Accept the logout pop up</td><td>
</td><td></td></tr>
<tr><td>7.2</td><td>Send the report to the sales director</td><td></td><td></td></tr>
</table>

2.5 Business Exceptions

No business exceptions were considered in this process.

3 Additional comments

- The table shows information from the previous month with respect to the current one.

4 Additional sources of documentation

Additional sources of documentation		
Process recordings	N/A	
High-level process map	High-level diagram	
Detailed level process map	Detailed diagram	
Input files	N/A	
Output files	Output file	Expected result's file