

Process Definition Document: Sales Report



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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](#).

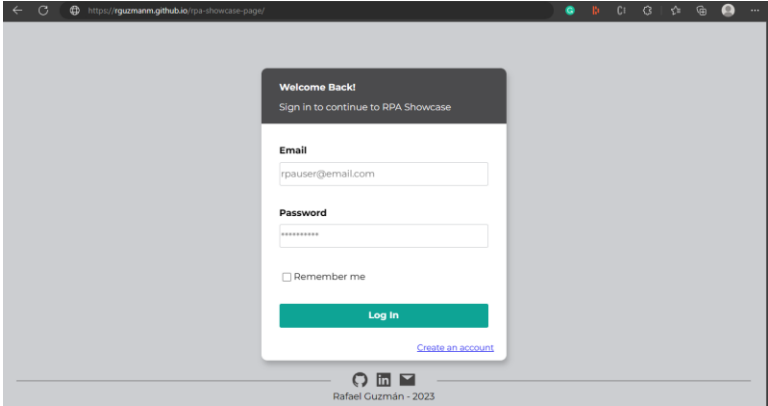
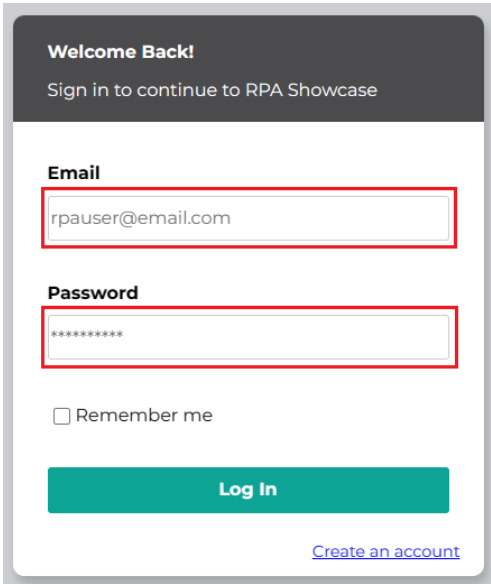


2.3.2 Detailed level process map

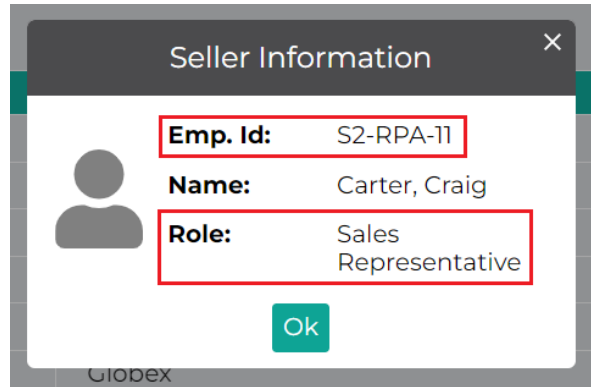
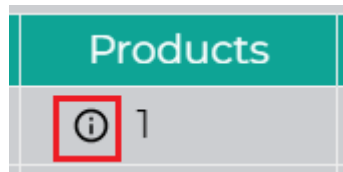
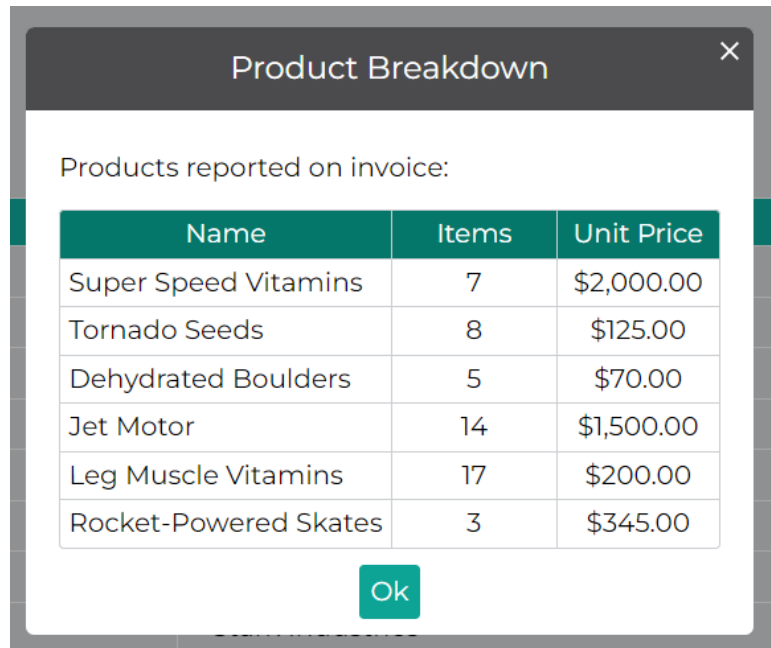
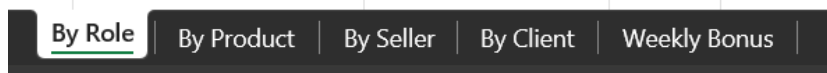
You can find the diagram containing the detailed steps to perform the process in the folder downloaded from the RPA Showcase page or [here](#).

2.4 DETAILED PROCESS ACTIONS

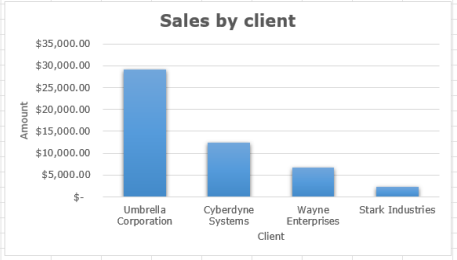
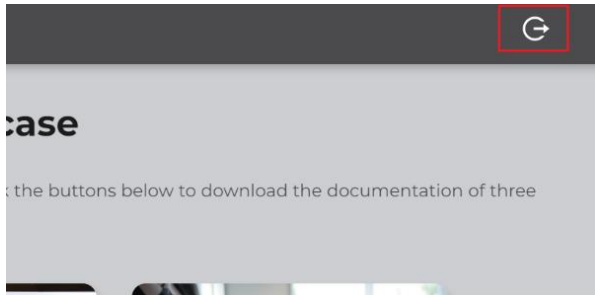
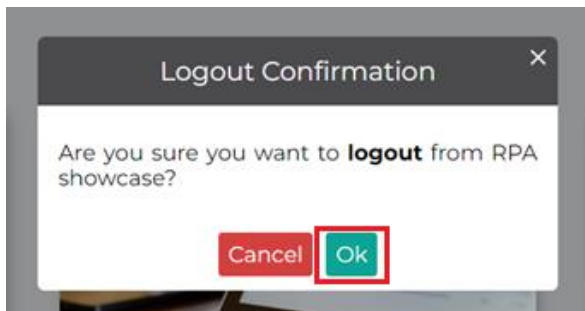
The following table contains the click-by-click process documentation.

#	Description	Screenshot	Comments
1	Open the RPA showcase page in a Chrome browser		Url: https://rguzman.github.io/rpa-showcase-page/
2	Enter the username and password		Click on the "Create an account" link to get the username and password
3	Click the "Log In" button		

		<div><div>Welcome Back!</div><div>Sign in to continue to RPA Showcase</div><div>Email</div><div><input type="text" value="rpauser@gmail.com"/></div><div>Password</div><div><input type="password" value="*****"/></div><div><input type="checkbox"/> Remember me</div><div>Log In</div><div>Create an account</div></div>																																																								
4	Wait for the main page to load and click in the "Sales" option from the top menu	<div><div><div><div></div></div><div>InvoicingSalesEmployees</div><div></div></div><div><div>RPA Showcase</div><div>Are you looking for an environment to build industry-like RPA projects? Click the buttons below to download the documentation of three common use cases.</div><div>Have fun!</div><div><div></div><div></div><div></div></div></div></div>																																																								
5	For each record in the table collect the date, seller, client, and products information of the previous month	<div><div>Total Sales Amount: \$6,273,735.00</div><div><div></div><div>mm/dd/yyyy</div><div>Clear</div></div><table><tr><th>Date</th><th>Seller</th><th>Client</th><th>Products</th><th>Amount</th></tr><tr><td>04/30/2023</td><td> Carter, Craig</td><td>Umbrella Corporation</td><td> 1</td><td>\$22,950.00</td></tr><tr><td>04/30/2023</td><td> Carter, Craig</td><td>Cyberdyne Systems</td><td> 6</td><td>\$40,785.00</td></tr><tr><td>04/30/2023</td><td> Doe, Jane</td><td>Intech</td><td> 7</td><td>\$54,430.00</td></tr><tr><td>04/30/2023</td><td> Jones, Eleanor</td><td>Umbrella Corporation</td><td> 4</td><td>\$8,675.00</td></tr><tr><td>04/30/2023</td><td> Venegas, Kevin</td><td>Wayne Enterprises</td><td> 4</td><td>\$14,700.00</td></tr><tr><td>04/29/2023</td><td> Patel, Sherrie</td><td>Globex</td><td> 7</td><td>\$52,355.00</td></tr><tr><td>04/29/2023</td><td> Baker, John</td><td>Wayne Enterprises</td><td> 4</td><td>\$58,970.00</td></tr><tr><td>04/29/2023</td><td> Jones, Eleanor</td><td>Stark Industries</td><td> 8</td><td>\$50,805.00</td></tr><tr><td>04/29/2023</td><td> McKinney, Walter</td><td>Intech</td><td> 5</td><td>\$8,980.00</td></tr><tr><td>04/29/2023</td><td> Doe, Jane</td><td>Intech</td><td> 6</td><td>\$53,395.00</td></tr></table><div>Rows per page 10 1 - 10 of 203</div></div>	Date	Seller	Client	Products	Amount	04/30/2023	Carter, Craig	Umbrella Corporation	1	\$22,950.00	04/30/2023	Carter, Craig	Cyberdyne Systems	6	\$40,785.00	04/30/2023	Doe, Jane	Intech	7	\$54,430.00	04/30/2023	Jones, Eleanor	Umbrella Corporation	4	\$8,675.00	04/30/2023	Venegas, Kevin	Wayne Enterprises	4	\$14,700.00	04/29/2023	Patel, Sherrie	Globex	7	\$52,355.00	04/29/2023	Baker, John	Wayne Enterprises	4	\$58,970.00	04/29/2023	Jones, Eleanor	Stark Industries	8	\$50,805.00	04/29/2023	McKinney, Walter	Intech	5	\$8,980.00	04/29/2023	Doe, Jane	Intech	6	\$53,395.00	
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5.1	Retrieve the sale's date, client, and amount directly from the table	<table><tr><th>Date</th><th>Seller</th><th>Client</th><th>Products</th><th>Amount</th></tr><tr><td>04/30/2023</td><td> Carter, Craig</td><td>Umbrella Corporation</td><td> 1</td><td>\$22,950.00</td></tr></table>	Date	Seller	Client	Products	Amount	04/30/2023	Carter, Craig	Umbrella Corporation	1	\$22,950.00																																														
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5.2	Click the icon next to the seller's name	<div><div>Seller</div><div> Carter, Craig</div></div>																																																								

5.3	Retrieve the employee's ID and role																							
5.4	Click the icon next to the products count																							
5.5	Retrieve the products name, items, and price	 <table><thead><tr><th>Name</th><th>Items</th><th>Unit Price</th></tr></thead><tbody><tr><td>Super Speed Vitamins</td><td>7</td><td>\$2,000.00</td></tr><tr><td>Tornado Seeds</td><td>8</td><td>\$125.00</td></tr><tr><td>Dehydrated Boulders</td><td>5</td><td>\$70.00</td></tr><tr><td>Jet Motor</td><td>14</td><td>\$1,500.00</td></tr><tr><td>Leg Muscle Vitamins</td><td>17</td><td>\$200.00</td></tr><tr><td>Rocket-Powered Skates</td><td>3</td><td>\$345.00</td></tr></tbody></table>	Name	Items	Unit Price	Super Speed Vitamins	7	\$2,000.00	Tornado Seeds	8	\$125.00	Dehydrated Boulders	5	\$70.00	Jet Motor	14	\$1,500.00	Leg Muscle Vitamins	17	\$200.00	Rocket-Powered Skates	3	\$345.00	
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6	Put the data retrieved on an Excel workbook with the sheets "By Role", "By Product", "By Seller", "By Client", and		The file name must be "Sales Report [Month] [Year].xlsx"																					

	"Weekly Bonus"																																														
6.1	Group the data retrieved by role and create a table, and a pie chart in the "By Role" sheet	<table><thead><tr><th>Ranking</th><th>Role</th><th>Amount</th></tr></thead><tbody><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></tbody></table> <table><thead><tr><th>Role</th><th>Amount</th><th>Percentage</th></tr></thead><tbody><tr><td>Sales Manager</td><td>\$ 50,000.00</td><td>67%</td></tr><tr><td>Sales Leader</td><td>\$ 20,000.00</td><td>27%</td></tr><tr><td>Sales Representative</td><td>\$ 5,000.00</td><td>6%</td></tr></tbody></table>	Ranking	Role	Amount	1	Sales Manager	\$ 50,000.00	2	Sales Leader	\$ 20,000.00	3	Sales Representative	\$ 5,000.00	Role	Amount	Percentage	Sales Manager	\$ 50,000.00	67%	Sales Leader	\$ 20,000.00	27%	Sales Representative	\$ 5,000.00	6%	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																				
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7	Click the logout button from the RPA Showcase app																											
7.1	Accept the logout pop up																											
7.2	Send the report to the sales director																											

2.5 BUSINESS EXCEPTIONS

No business exceptions were considered in this process.

3 ADDITIONAL COMMENTS

- The dates on the table are always from the previous month.

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