



# Project Scope and Requirements

Business Intelligence  
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**bi4all**

# SCOPE



A major technology retail company aimed to have a solution providing a daily view of product sales and related cost in all their Portuguese online stores. This would help the decision-making process and the definition of strategies for a more efficient market operation. To this end, business data was provided as baseline for the creation of a visual solution using Power BI. The requirements to this project were defined during a meeting with the business stakeholders - please see the details in the next pages.

# REQUIREMENTS

**Project Team** 9:50 AM

Good afternoon. I'm a member of the team that is going to develop your **Power BI solution** and I would like to understand with you what are your **main needs and goals with this project**.

**CD**

**Commercial Director** 9:51 AM

Hi! In a commercial perspective, we would like to have a **dashboard where we can see a daily view of our Sales Value, with and without tax**. It is important to **understand the variation of Costs and the profit margin**. It Would be interesting to **have that information calculated and easy to understand**. Beside that **it's important to have a geographic view of the sales value**.

**SM**

**Sales Manager** 9:52 AM

For my daily job I **need to compare the performance of each stores**. I would like to **see the sales by store and be capable of compare the total sales with the target for each store**. And would **like to see the sales by product compared to it target value**.

# REQUIREMENTS

CD

Commercial Director 9:52 AM

Since we have historical data, can you show me the evaluation by year, month, week and so on? will be very useful! But, apart sales volume, it is important to us the costs and gross margin volume.

And don't forget our KPIS! We need to highlight them to facilitate data analysis/visualization.

Project Team 9:53 AM

Thank you for the details! I still have a question. I already analyse the data that you share, and I can't find information about product sales target. Should we considere any formula?

CD

Commercial Director 9:54 AM

Excelent question!

If possible we can use the followig logic:

The monthly sales target of a product will be plus 25% of the total sales for that Product in same period, last year.

Well, I don't know if you can, but we would love if you can give us a sales prediction for the next months.

Any other suggestions will be welcome. Fill free to suggest new or other approach and analysis.

# REQUIREMENTS

LM

**Logistic Manager** 9:54 AM

For me it's very interesting to measure how long it takes to delivery an order (Only for orders that were delivered).  
Also, I need to know how many orders are still in progress (Not Delivery)  
And It's very important to know our Customers and see their Sales.

CD

**Commercial Director** 9:54 AM

I almost forgot!

We have some partners in the USA and they want to see the information not only in euros but also in dollars.  
If you find any problems in our data, please let us know.

**Project Team** 9:56 AM

Ok, perfect, let's do it! Thank you for your time. Hope you'll enjoy the final result



# DATA DESCRIPTION

The following table should explain each one of the files that represent the business of the Retailer Company. All the files should be loaded and related in PowerBI.

Origin	File Mask	Contents / Description
Folder	InvoiceDetails\InvoiceDetails	Folder with one file per store all of them should be loaded. Each file represent the details of Orders by store
Folder	Invoices\InvoiceHeader	Folder with one file per store all of them should be loaded. Each file represent the Orders Headers by store
File	Customers.xlsx	Reference Data about the Customers
File	LocationDetail.xlsx	Reference Data about the Locations
File	Product.xlsx	Reference Data about the Products
File	FamilyImages.xlsx	Product family images
File	Store.xlsx	Reference Data about the stores
File	Target.xlsx	This file represent the Sales target for 2020 that should be archived by Month and Store
File	Conversion EUR to USD.txt	Average monthly euro to dollar conversion rate for 2020/2021

THANK YOU AND GOOD WORK!



**b14all**