**Project sales report:**

**Business requirements**: from steven

1) we need to improve sales reports and want to move from static reports to visual dashboard

essentially, we want to focus it on how much we have sold of what products, to which clients and how it has been over time

2) filter different products based on each salesperson and customers

3) we measure our numbers against budget so I added that in a spreadsheet so we can compare our values against performance

4) The budget is for 2021 and we usually look 2 years back in time when we do analysis of sales

**DEMAND OVERVIEW:**

* Reporter: Steven – Sales Manager
* Value of Change: Visual dashboards and improved Sales reporting or follow up or sales force
* Necessary Systems: Power BI, CRM System
* Other Relevant Info: Budgets have been delivered in Excel for 2021

**User Stories:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No #** | **As a (role)** | **I want (request / demand)** | **So that I (user value)** | **Acceptance Criteria** |
| **1** | Sales Manager | To get a dashboard overview of internet sales | Can follow better which customers and products sells the best | A Power BI dashboard which updates data once a day |
| **2** | Sales Representative | A detailed overview of Internet Sales per Customers | Can follow up my customers that buys the most and who we can sell ore to | A Power BI dashboard which allows me to filter data for each customer |
| **3** | Sales Representative | A detailed overview of Internet Sales per Products | Can follow up my Products that sells the most | A Power BI dashboard which allows me to filter data for each Product |
| **4** | Sales Manager | A dashboard overview of internet sales | Follow sales over time against budget | A Power Bi dashboard with graphs and KPIs comparing against budget. |

**FACT TABLE VS DIMENSION TABLE?**

**SQL Data Cleaning:**

--Commented out attributes from dimension date table that I don’t need for analysis

**Calendar table**

Graphical user interface, text, application, email

Description automatically generated

**Customers table editing**

Text

Description automatically generated

**PRODUCTS TABLE:**

Graphical user interface, text, application

Description automatically generated