Functional Requirement Document (FRD)

1. Project Title

CRM Sales Opportunity Dashboard

2. Dashboard Sections

The dashboard will be divided into four main sections:
- **Overview Page:** Displays KPIs such as Total Revenue, Total Deals, Win Rate, and Average Sales Cycle.
- **Product & Agent Page:** Visualizes product performance and agent-wise deal metrics.
- **Account & Sector Page:** Shows customer account distribution, sector-wise performance, and deal stage analysis.
- **Quarterly Overview Page:** Displays quarterly trends, top-performing agents, and comparative analysis.

3. Data Requirements

Key data fields required include:
- Deal ID
- Agent Name
- Product Name
- Sector
- Account Name
- Deal Stage
- Revenue
- Engaged Date
- Closed Date
- Manager Name
- Status (Won, Lost, Engaged, Proposed)

4. Filters / Slicers

The following filters/slicers will be available:
- Date Range (Close Date)
- Agent Name
- Product Name
- Sector
- Deal Stage
- Manager

5. Visuals / Charts

- Cards: KPIs like Total Revenue, Total Deals, Average Close Days, Win Rate
- Bar Chart: Revenue by Manager / Agent
- Pie Chart: Deal Stage Distribution
- Line Chart: Revenue Trend by Month/Quarter
- Table: Detailed Deal Information
- Column Chart: Top Performing Products

6. Interactivity

- **Drill-through:** Click on agent or manager to view detailed deal data.
- **Cross-filtering:** Selecting one visual filters others.
- **Tooltip Pages:** Show agent or product details on hover.

7. Calculations / Measures

- `Total Revenue = SUM('sales_pipeline'[close_date])`
- `Total Deals = COUNTROWS('Sales_Pipeline')`

- Won Deals =
  ```
  CALCULATE(COUNTROWS('Sales_Pipeline'), 'Sales_Pipeline'[Deal_Stage] = "Won")
  ```
- Lost Deals =
  ```
  CALCULATE(COUNTROWS('Sales_Pipeline'), 'Sales_Pipeline'[Deal_Stage] = "Lost")
  ```
- Win Rate % = `DIVIDE([Won Deals], [Total Deals])`
- Avg Close Days =
  ```
  AVERAGE('sales_pipeline'[close_date])
  ```
- Closed Deal Count =
  ```
  CALCULATE(
      COUNTROWS('sales_pipeline2'),
      'sales_pipeline2'[deal_stage] = "Won"
  )
  ```
- Agent Rank =
  ```
  RANKX(
      ALL('sales_pipeline2'[sales_agent]),
      [Performance Score],
      ,
      DESC,
      DENSE
  )
  ```

8. Export / Reporting Needs

The dashboard can be exported as:
- PDF Report (Overview Page)
- Excel Data Extract (Deal Details)
- Power BI Service Sharing with filters enabled

9. Notes / Special Instructions

- Ensure clean and formatted date columns (handle blanks).
- Use bookmarks for navigation buttons.
- Highlight best-performing manager and agent.
- Add a drill-through for quarterly performance analysis.