Sales Dashboard Requirements

- This user story outlines the specifications for building a dashboard using tableau to help stakeholders, including sales managers and executives to analyze sales performance.
  - **Sales Dashboard:** The purpose of sales dashboard is to present an overview of the sales metrics and trends to analyze year-over-year sales performance and understand sales trends.
    - **Key Requirements:**
      - **KPI Overview:** Display a summary of total sales, profits and quantity for the current year and previous year. (BANS)
      - **Sales Trends: (sparkline)**
        - Present the data for each KPI monthly for both the current year and the previous year.
        - Identify months with highest and lowest sales and make them easy to recognize.
      - **Product subcategory comparison: (bar-in-bars)**
        - Compare sales performance by different product subcategories for the current year and the previous year.
        - Include a comparison of sales with profit.
      - **Weekly trends for sales and profit: (line chart)**
        - Present weekly sales and profit data for the current year.
        - Display the average weekly values.
        - Highlight weeks that are above and below the average to draw attention to sales & profit performance.

Design & Interactivity Requirements

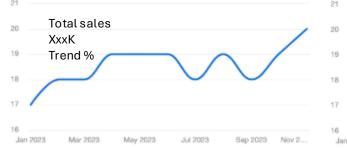- **Dashboard Dynamics: (parameters, buttons, filter actions)**
  - The Dashboard should allow users to check historical data by offering them the flexibility to select any desired year.
  - Provide users with the ability to navigate between the dashboards easily.
  - Make the charts and graphs interactive, enabling users to filter data using the charts.
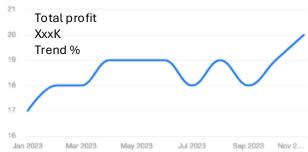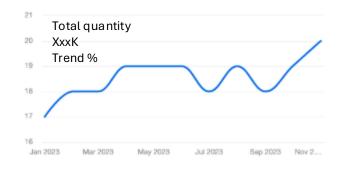
- **Data Filters: (quick filters)**
  - Allow users to filter data by product information like category and subcategory and by location information like region, state and city.

Mockup

Filter tool will be added to filter by category, sub-category, region, city

Total sales
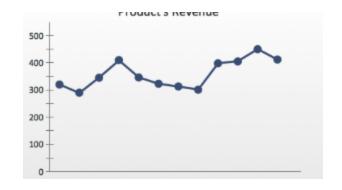XxxK
Trend %

Total profit
XxxK
Trend %

Total quantity
XxxK
Trend %

Max and
min values
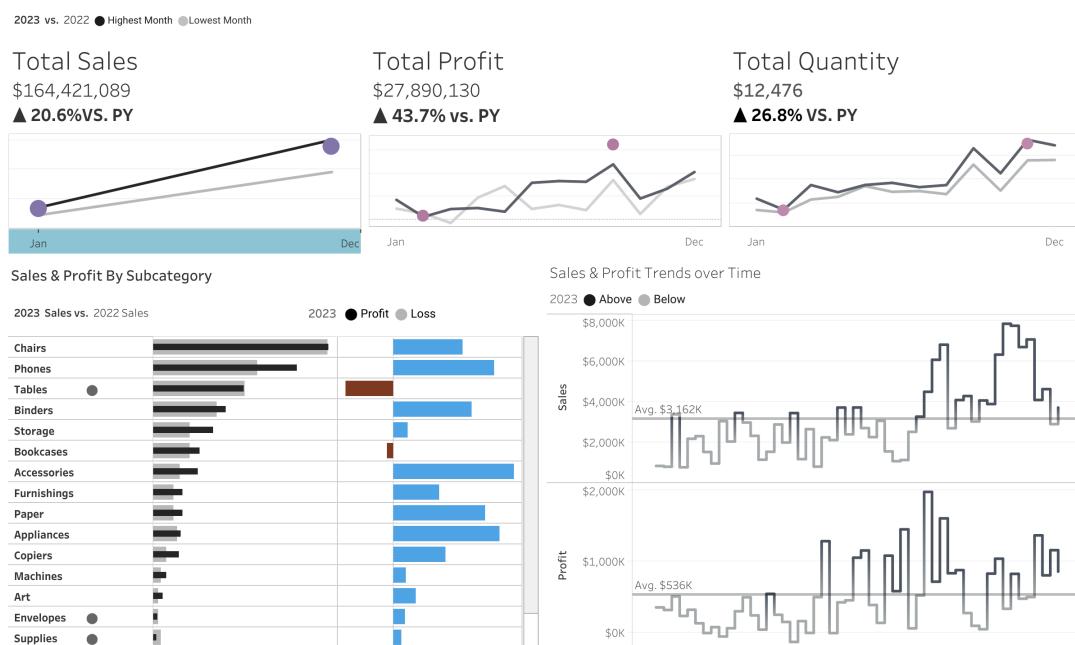will
be shown

For sales and profit by category

Product's Revenue

Use a graph like this for both profit and sales with the median being highlighted

Sales Dashboardb | 2023

2023 vs. 2022 ● Highest Month ○ Lowest Month

Total Sales
$164,421,089
▲ **20.6% VS. PY**

Total Profit
$27,890,130
▲ **43.7% vs. PY**

Total Quantity
$12,476
▲ **26.8% VS. PY**

Jan — Dec (Total Sales)
Jan — Dec (Total Profit)
Jan — Dec (Total Quantity)

Sales & Profit By Subcategory

2023 Sales vs. 2022 Sales   2023 ● Profit ○ Loss

Subcategory
Chairs
Phones
Tables ●
Binders
Storage
Bookcases
Accessories
Furnishings
Paper
Appliances
Copiers
Machines
Art
Envelopes ●
Supplies ●

Sales & Profit Trends over Time

2023 ● Above ○ Below

Sales: Avg. $3,162K
$8,000K, $6,000K, $4,000K, $2,000K, $0K

Profit: Avg. $536K
$2,000K, $1,000K, $0K

0 5 10 15 20 25 30 35 40 45 50 55