



Product Requirements and Specification Document (PRD)

Project Name

FinSight - Financial KPI Tracker

Description

Develop a Power BI dashboard for startups and businesses to track key financial metrics—revenue, expenses, and profit margins. The dashboard will utilize DAX measures and conditional formatting to enable trend analysis and actionable insights.

1. Objectives

Objective	Description
Financial Visibility	Provide real-time tracking of core financial KPIs
Trend Analysis	Enable users to identify trends and anomalies via visual cues
Usability	Ensure intuitive navigation and clear data presentation
Actionable Insights	Support decision-making with up-to-date, accurate metrics

2. Core Features

Feature	Description
KPI Cards	Display current values for Revenue, Expenses, Profit Margin
Trend Visualizations	Line/area charts showing historical trends for each KPI
Conditional Formatting	Visual cues (e.g., color changes) for positive/negative trends
Time Period Filters	Allow users to filter data by month, quarter, year
Data Refresh	Support scheduled and manual data refresh
Drill-Down Capability	Enable users to explore data at different levels (e.g., by department)

3. Functional Requirements

ID	Requirement
FR1	Import financial data (CSV, Excel, or database connection)
FR2	Calculate KPIs using DAX: Revenue, Expenses, Profit Margin
FR3	Visualize KPIs with cards and trend charts
FR4	Apply conditional formatting to highlight trends (e.g., green for growth, red for decline)



FR5	Implement time-based filters (month, quarter, year)
FR6	Enable drill-down on charts for detailed analysis
FR7	Support data refresh (manual and scheduled)

4. Non-Functional Requirements

ID	Requirement
NFR1	Dashboard loads within 5 seconds
NFR2	Responsive layout for desktop/tablet
NFR3	Secure data handling
NFR4	Documentation for end-users

5. Data Model

Table	Key Fields	Description
Transactions	Date, Amount, Type, Department	Raw financial transactions
Departments	DepartmentID, Name	Department reference data

Sample DAX Measures:

```
Revenue = CALCULATE(SUM(Transactions[Amount]), Transactions[Type] = "Revenue")
Expenses = CALCULATE(SUM(Transactions[Amount]), Transactions[Type] = "Expense")
Profit Margin = DIVIDE([Revenue] - [Expenses], [Revenue])
```

6. User Interface Specifications

Component	Specification
Header	Project title, logo
KPI Cards	Revenue, Expenses, Profit Margin (with conditional formatting)
Trend Charts	Line/area charts for each KPI, with drill-down
Filters	Date range selector (month, quarter, year), Department filter
Data Table (optional)	Tabular view of raw transactions

7. Conditional Formatting Rules

KPI	Condition	Formatting
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Revenue	Increase vs. previous period	Green highlight
Revenue	Decrease vs. previous period	Red highlight
Expenses	Increase vs. previous period	Red highlight
Expenses	Decrease vs. previous period	Green highlight
Profit Margin	< Target (e.g., 20%)	Red text
Profit Margin	≥ Target	Green text

8. Technology Stack

Component	Technology
Dashboard	Power BI
Data Modeling	Power BI, DAX
Data Source	CSV, Excel, DB

9. Milestones & Timeline

Milestone	Target Date
Requirements Finalized	Week 1
Data Model Setup	Week 2
DAX Measures Implemented	Week 2
Dashboard Design	Week 3
User Testing	Week 4
Go-Live	Week 5

10. Acceptance Criteria

- All KPIs are accurately calculated and displayed
- Trend analysis and conditional formatting function as specified
- Filters and drill-downs operate correctly
- Dashboard loads within performance targets
- User documentation is complete

11. Out of Scope

- Integration with external accounting software
 - Mobile app version
 - Advanced predictive analytics
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12. Stakeholders

Role	Responsibility
Product Owner	Requirements, approval
Developer	Implementation
Analyst	Data modeling
End User	Feedback, testing

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