

Sales Analysis Report

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Business Demand Overview

- **Reporter:** Mohammed, Sales Manager
- **Value of Change:** Visual Dashboard and Improved Sales Reporting
- **Necessary Systems:** Power BI, CRM Systems
- **Other Relevant Info:** Budget has been delivered in Excel for 2022

'User Story:

#	As a (role)	I want (request/demand)	So that (I use value)	Acceptance Criteria
1	Sales Manager	A dashboard overview of internet sales	Can follow better which customers and products sells the best	A power bi ¹ dashboard which updates one a day
2	Sales Representative	A detailed overview of internet sales per customer	Can follow up my customers that buys the most and who ² we can sell more	A power bi dashboard which allows me to filter data from each customer
3	Sales Representative	A detailed overview of internet sales per product	Can follow up my products that sells ³ the most	A power bi dashboard which allows me to filter data from each Product
4	Sales Manager	A dashboard overview of internet sales	Follow sales overtime against budget	A power bi dashboard with graphs and KPIs comparing against ⁴ budget

/***** Cleaned Dim_Date Table *****/

```
SELECT
    [DateKey]
    ,[FullDateAlternateKey] As Date
    -- ,[DayNumberOfWeek]
    ,[EnglishDayNameOfWeek] As Day
    -- ,[SpanishDayNameOfWeek]
    -- ,[FrenchDayNameOfWeek]
    -- ,[DayNumberOfMonth]
    -- ,[DayNumberOfYear]
    ,[WeekNumberOfYear] As WeekNo
    ,[EnglishMonthName] As Month
    -- LEFT([EnglishMonthName],3) As MonthShort
    -- ,[SpanishMonthName]
    -- ,[FrenchMonthName]
    -- ,[MonthNumberOfYear] As MonthNo
    -- ,[CalendarQuarter] As Quarter
    -- ,[CalendarYear] As year
    -- ,[CalendarSemester]
    -- ,[FiscalQuarter]
    -- ,[FiscalYear]
    -- ,[FiscalSemester]
FROM
    [AdventureWorksDW2019].[dbo].[DimDate]
WHERE
    [CalendarYear] >= 2020;
```

100 %

Results Messages

	DateKey	Date	Day	WeekNo	Month	MonthShort	MonthNo	Quarter	year
1	20200101	2020-01-01	Wednesday	1	January	Jan	1	1	2020
2	20200102	2020-01-02	Thursday	1	January	Jan	1	1	2020
3	20200103	2020-01-03	Friday	1	January	Jan	1	1	2020

/***** Cleaned Dim_Customer Table *****/

```

SELECT
    C.[CustomerKey] As CustomerKey
    ,[GeographyKey]
    ,[CustomerAlternateKey]
    ,[Title]
    ,C.[FirstName] As [First Name]
    ,[MiddleName]
    ,[LastName] As [Last Name]
    ,C.[FirstName] + ' ' + [LastName] As [Full Name],
    ,[NameStyle]
    ,FORMAT ([BirthDate], 'yyyy') As [Birth Year],
    Case C.[MaritalStatus] When 'M' Then 'Married' When 'S' Then 'Single' END As MaritalStatus,
    ,[Suffix]
    Case C.[Gender] When 'M' Then 'Male' When 'F' Then 'Female' END As Gender
    ,[EmailAddress]
    ,[YearlyIncome] As [Income]
    ,[TotalChildren]
    ,[NumberChildrenAtHome] As [KidHome]
    ,[EnglishEducation] As [Education]
    ,[SpanishEducation]
    ,[FrenchEducation]
    ,[EnglishOccupation]
    ,[SpanishOccupation]
    ,[FrenchOccupation]
    ,[HouseOwnerFlag]
    ,[NumberCarsOwned] As [Owned Car]
    ,[AddressLine1]
    ,[AddressLine2]
    ,[Phone]
    ,C.[DateFirstPurchase] As [Customer Join Date]
    ,[CommuteDistance]
    ,G.[City] As [Customer City] --Joined in Customer City from Geography Table
FROM
    [DimCustomer] As C
    left Join [DimGeography] As G
    ON C.[GeographyKey] = G.[GeographyKey]
ORDER BY
    C.[CustomerKey] --Order List By CustomerKey

```

70 %

Results Messages

	CustomerKey	First Name	Last Name	Full Name	Birth Year	MaritalStatus	Gender	Income	KidHome	Education	Owned Car	Customer Join Date	Customer City
1	11000	Jon	Yang	Jon Yang	1971	Married	Male	90000.00	0	Bachelor	0	2020/11/19	Rockhampton

```

/***** Cleaned Dim_Product Table *****/

SELECT
    P.[ProductKey],
    P.[ProductAlternateKey]           As productItemCode,
    P.[ProductSubcategoryKey]
    --, [WeightUnitMeasureCode]
    --, [SizeUnitMeasureCode]
    P.[EnglishProductName]           As [Product Name],
    -- Joined in from Category Table.
    PC.[EnglishProductCategoryName]   As[Product Category Name],
    -- Joined in from SubCategory Table.
    PS.[EnglishProductSubcategoryName] As[Product SubCategory Name],
    --, [SpanishProductName]
    --, [FrenchProductName]
    --, [StandardCost]
    --, [FinishedGoodsFlag]
    P.[Color]                         As [Product Color],
    --, [SafetyStockLevel]
    --, [ReorderPoint]
    --, [ListPrice]
    P.[Size]                         As [Product Size],
    --, [SizeRange]
    --, [Weight]
    --, [DaysToManufacture]
    P.[ProductLine]                  As [Product Line],
    --, [DealerPrice]
    --, [Class]
    --, [Style]
    P.[ModelName]                    As [Product Model Name],
    --, [LargePhoto]
    P.[EnglishDescription]            As[Product Description],
    --, [FrenchDescription]
    --, [ChineseDescription]
    --, [ArabicDescription]
    --, [HebrewDescription]
    --, [ThaiDescription]
    --, [GermanDescription]
    --, [JapaneseDescription]
    --, [TurkishDescription]
    --, [StartDate]
    --, [EndDate]
    --, isnull(P.[Status], 'Outdated') As [Product Status]

FROM
    [DimProduct] As P
Left Join [DimProductSubcategory] As PS
    ON PS.[ProductSubcategoryKey] = P.[ProductSubcategoryKey]

Left Join [DimProductCategory] As PC
    ON PS.ProductCategoryKey = PC.ProductCategoryKey;
```

```

/***** Cleaned Fact_InternetSales Table *****/

SELECT
    [ProductKey]
    , [OrderDateKey]
    , [DueDateKey]
    , [ShipDateKey]
    , [CustomerKey]
    , [PromotionKey]
    , [CurrencyKey]
    , [SalesTerritoryKey]
    , [SalesOrderNumber] As [OrderID],
    , [SalesOrderLineNumber]
    , [RevisionNumber]
    , [OrderQuantity]
    , [UnitPrice]
    , [ExtendedAmount],
    , [UnitPriceDiscountPct]
    , [DiscountAmount]
    , [ProductStandardCost]
    , [TotalProductCost] As [Product Cost],
    , [SalesAmount] As [Sales Amount],
    , [TaxAmt] As [Tax Amount],
    , [Freight]
    , [CarrierTrackingNumber]
    , [CustomerPONumber]
    , FORMAT([OrderDate], 'dd-MM-yyyy') As [OrderDate],
    , [DueDate]
    , FORMAT([ShipDate], 'dd-MM-yyyy') As [ShipDate]
FROM
    [dbo].[FactInternetSales]
WHERE --Ensures we always only bring two of date from extraction.
    Left( [OrderDateKey], 4 ) >= YEAR(GETDATE()) -2
ORDER BY
    [OrderDateKey] ASC

```

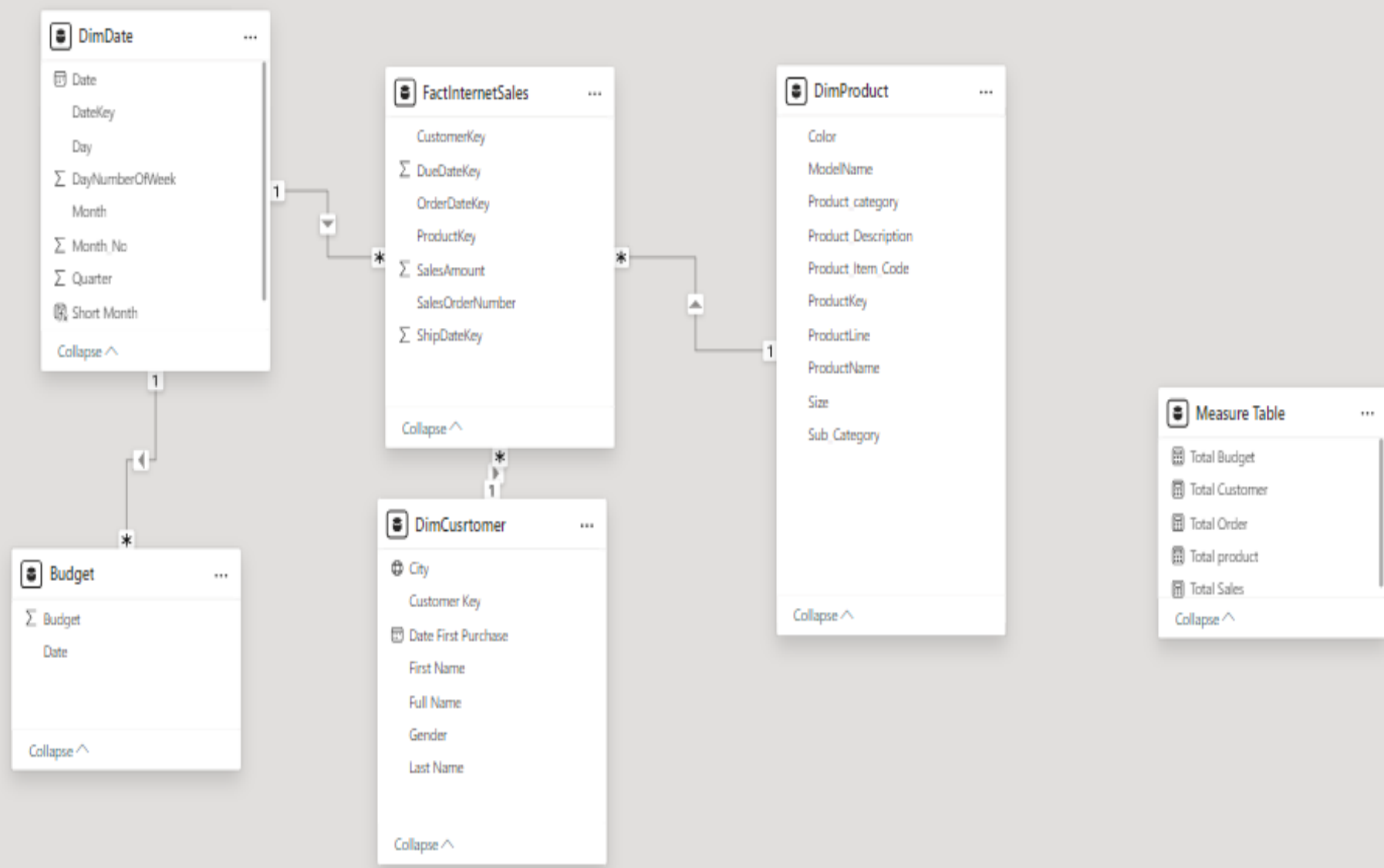
80 %

Results Messages

ProductKey	OrderDateKey	DueDateKey	ShipDateKey	CustomerKey	OrderID	Product Cost	Sales Amount	Tax Amount	OrderDate	ShipDate
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DAX



Analysis Process And Dashboard

Sales Overview

Year

202220232024

Month

AprAugDecFebJanJulJunMarMayNovOctSep



\$22.24M

Total Sales

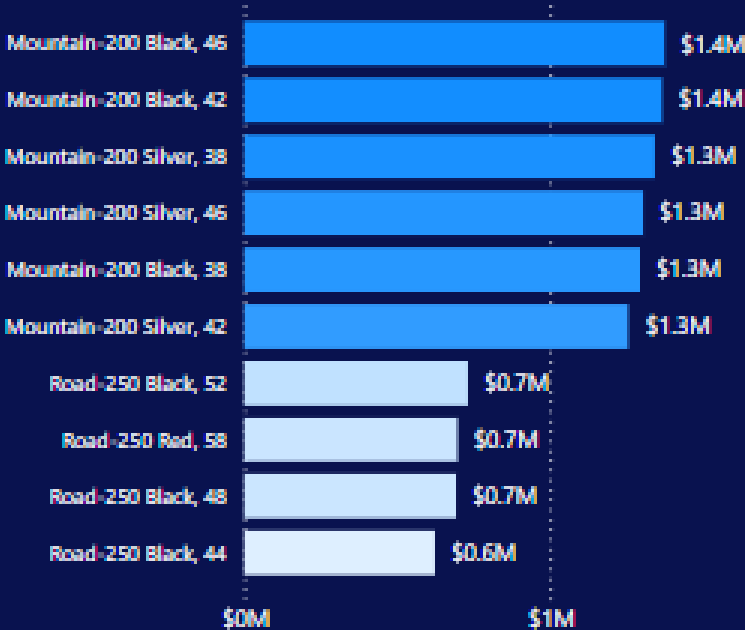
21M

Total Budget

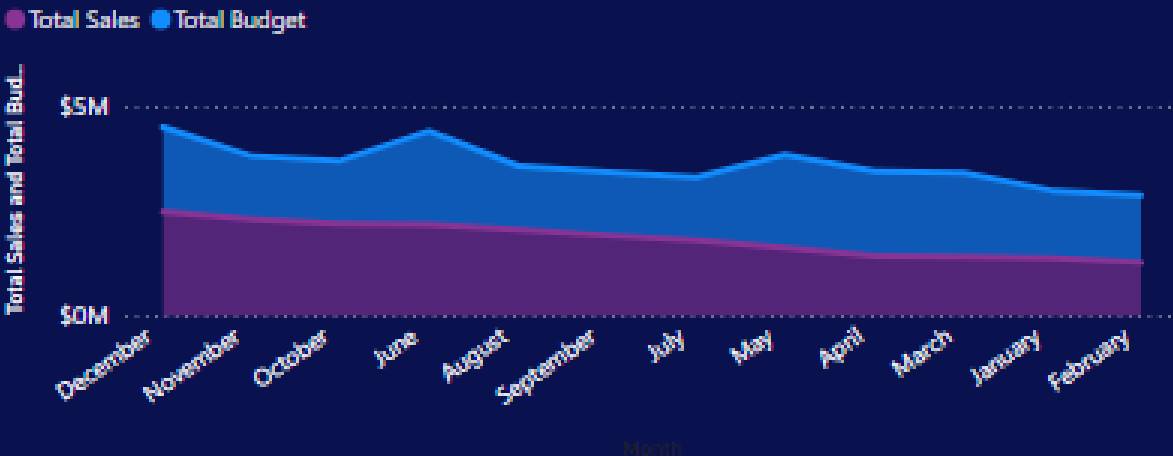
58.17K

Total Order

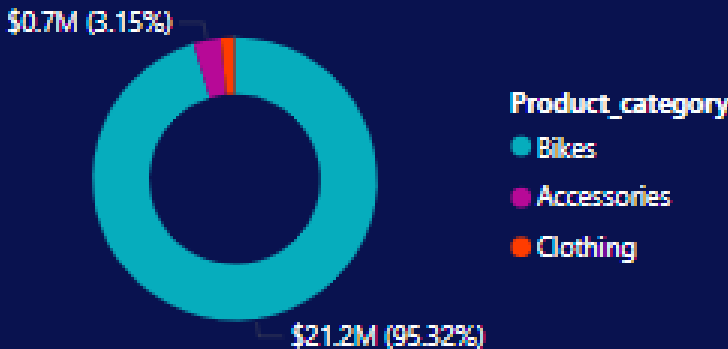
Total Sales by ProductName



Total Sales and Total Budget by Month



Total Sales by Product_category



City

All

ProductName

All

Product_category

All

Sub_Category

All





\$22.24M

Total Sales

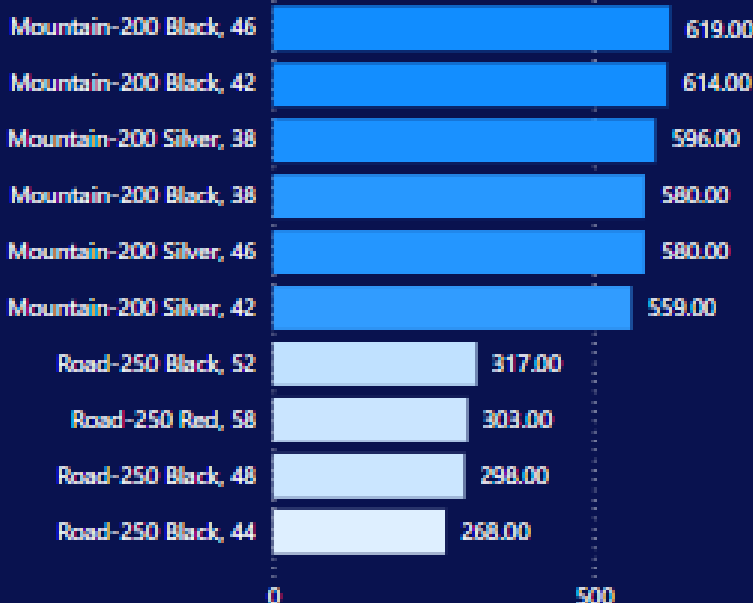
58.17K

Total Order

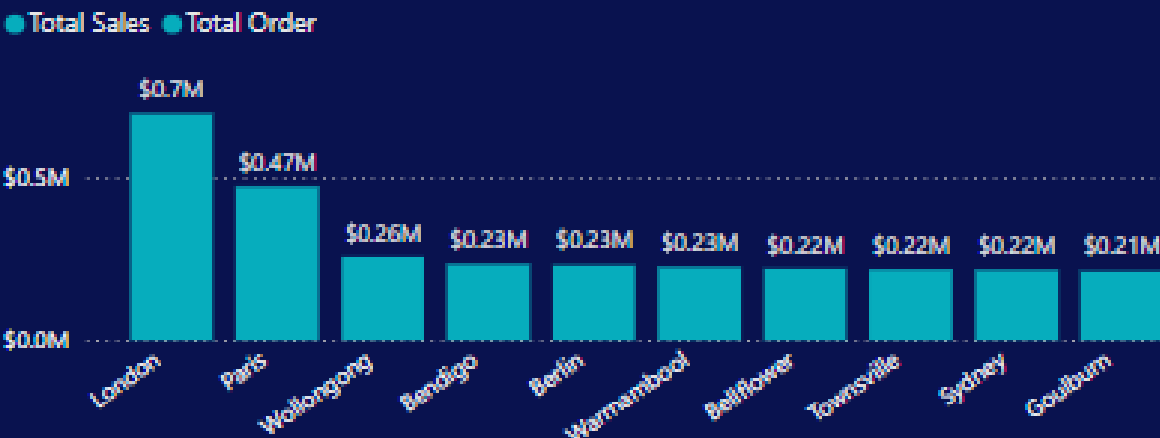
133

Total product

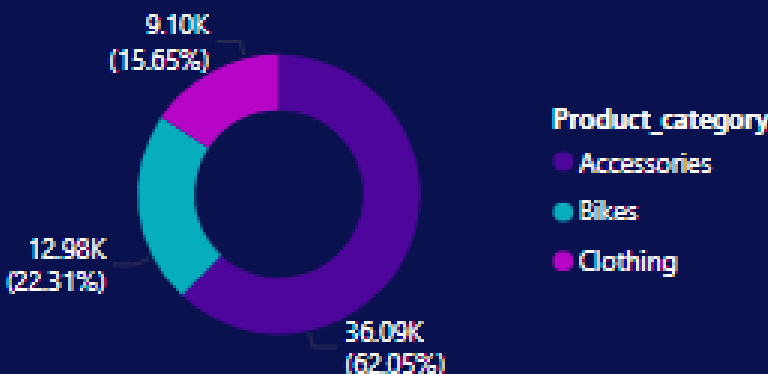
Total Order by ProductName



Total Sales and Total Order by City



Total Order by Product_category



City

All

ProductName

All

Product_category

All

Sub_Category

All

Product_category

Bikes

Sub_Category



Customer

Year

2022

2023

2024

Month

Apr

Aug

Dec

Feb

Jan

Jul

Jun

Mar

May

Nov

Oct

Sep



\$22.24M

Total Sales

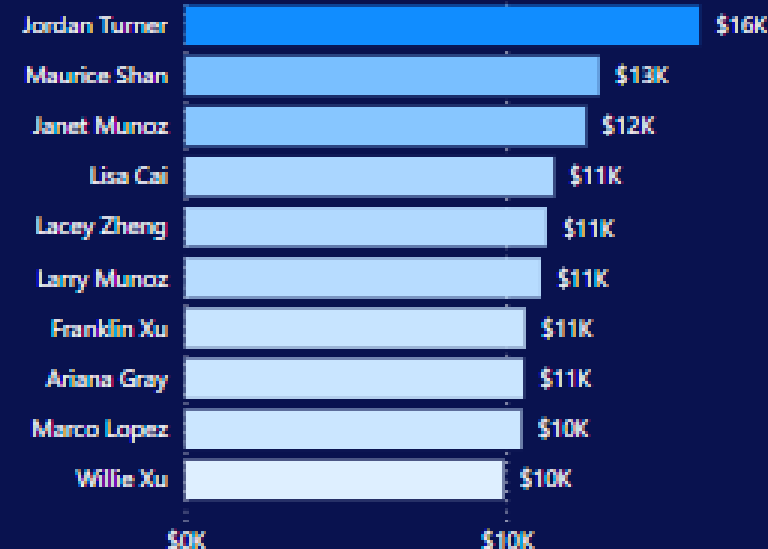
58.17K

Total Order

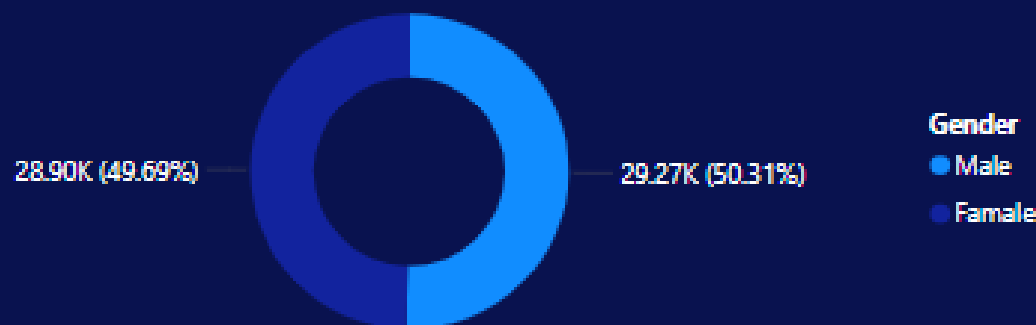
18.22K

Total Customer

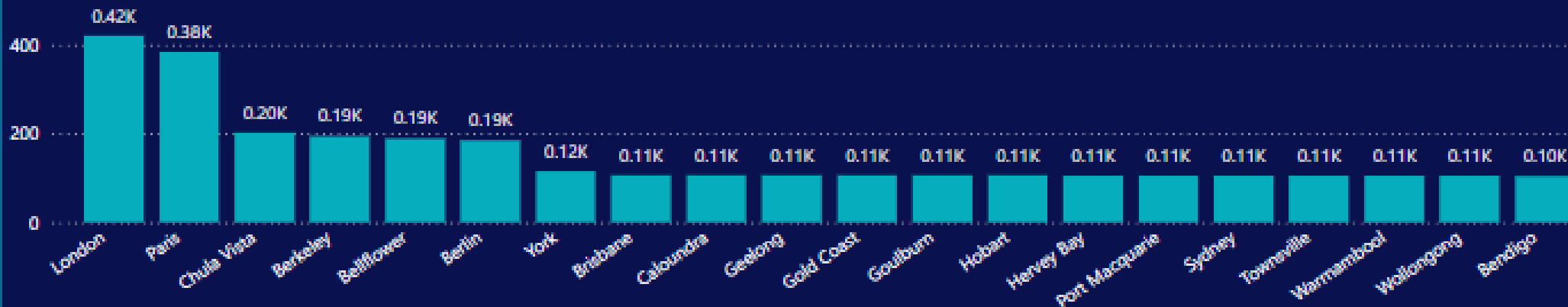
Top Customer



Total Order by Gender



Total Customer by City



City

All

ProductName

All

Product_cat...

All

Sub_Category

All

Gender

All

The background is a solid dark blue. In the top right corner, there is a thin, light blue line forming a jagged, abstract shape. In the bottom left corner, there is another thin, light blue line forming a similar jagged, abstract shape.

Thanks