

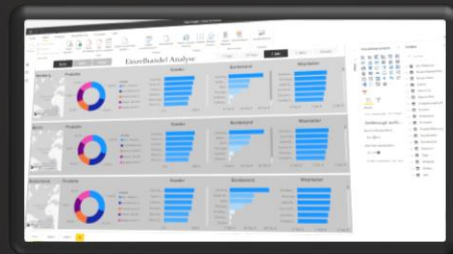
Overview

You are assigned to develop a report for the Dataline Bike Company. This company manufactures and sells bikes and accessories to the global market.

The report will be reviewed by the CEO as well as the Marketing and Products team.


At the moment the relevant reports are created manually in pdf and Excel and they want to replace these reports now with Power BI reports.


The two different user groups have different requirements which will be layed out in the next pages.





Source data – part I

- We have 4 csv files with the sales orders from 2017-2020

 Sales2017

 Sales2018


 Sales2019

 Sales2020

SalesOrderLineKey	ResellerKey	Customer	ProductKey	OrderDateKey	SalesTerri	Order Qty	Unit Price	Unit Price	Product Standard Cost		
43663001	510	-1	322	20170707		4	1	419.4589	0	413.1463	
43666001	511	-1	330	20170709		4	1	419.4589	0	413.1463	
43666006	511	-1	334	20170709		4	1	419.4589	0	413.1463	
43678001	203	-1	322	20170718		4	1	419.4589	0	413.1463	
43678003	203	-1	332	20170718		4	1	419.4589	0	413.1463	
43678013	203	-1	342	20170718		4	1	419.4589	0	413.1463	

The data – part II

- We have one Excel file with multiple sheets

 Retail Company Data

A	B	C	D	E	F	G	H	I	J
ProductKey	SKU	Product	Standard Cost	Color	List Price	Model	Subcategory	Category	
210	FR-R92B-5	HL Road Fr	868.6342	Black	1431.5	HL Road Fr	Road Frames	Components	
215	HL-U509	Sport-100	12.0278	Black	33.6442	Sport-100	Helmets	Accessories	
216	HL-U509	Sport-100	13.8782	Black	33.6442	Sport-100	Helmets	Accessories	
217	HL-U509	Sport-100	13.0863	Black	34.99	Sport-100	Helmets	Accessories	
253	FR-R38B-5	LL Road Fr	176.1997	Black	297.6346	LL Road Fr	Road Frames	Components	
254	FR-R38B-5	LL Road Fr	170.1428	Black	306.5636	LL Road Fr	Road Frames	Components	
255	FR-R38B-5	LL Road Fr	204.6251	Black	337.22	LL Road Fr	Road Frames	Components	
256	FR-R38B-6	LL Road Fr	176.1997	Black	297.6346	LL Road Fr	Road Frames	Components	

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Sales Order (not needed)

Sales Territory

Customer

Product

Reseller

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The report

- ❑ The report will be used by two different user groups:
 - Our CEO and the managers
 - Product and marketing specialists

The two user groups have different requirements which, ideally, should be all met. You can create multiple report pages for that if necessary.

Requirements - CEO

- ❑ The CEO wants to understand what products drive profit / loss in different countries. By hovering over the countries the CEO also wants to see the profit development in a report page tooltip.
- ❑ Overall development over time of the revenue is very interesting.
- ❑ Profit of all categories / subcategories is also something important.
Suggestion: Matrix visual with additional conditional formatting such as data bars to make it more readable for the CEO.

Requirements – Marketing & Products team

- ❑ The Marketing & Products team would like to see the total sales amount year to date.
- ❑ They would also like to see the difference in profit compared to the previous year.
- ❑ They would also like to see a details page where they can drill from the Executive Summary's page to these details. These details are about the exact list of orders incl. order date, order quantity, revenue, profit product and country.
- ❑ They would like to have one page with a customer analysis incl. average profit per customer and how it might have changed over time, top 10 customers in terms of revenue.
- ❑ They would like to have one page where they want to understand how
 - ❑ the revenue in the different categories has devolopped over time
 - ❑ the profit margine (defined as percentage of profit from the revenue) has devolopped over time and what are the profit making categories, subcategories and products.

Additional instructions

- ❑ You might need to clean up the data in some cases and transform what is necessary.
- ❑ In the sales table there is the order date only in the format 20221231. It might help to create an additional date column and/or a create a date dimension.
- ❑ Create the appropriate data model.
- ❑ You need to create some measures such as:
 - ❑ $\text{Revenue} = \text{Order quantity} * \text{Unit price}$
 - ❑ $\text{Profit} = \text{Order quantity} * (\text{Unit price} - \text{Product Standard cost})$
 - ❑ Year-to-Date Measure
- ❑ Create drillthroughs and drilldowns where necessary.
- ❑ The report should be designed as nicely as possible and easy to read.
- ❑ The company is flexible and open for your additional suggestions regarding report. So, there is some room your creativity.

Share your results

You are able to create an interactive and professionally looking report by now!

Please share your results with us!

Hope you will enjoy it 😊

