

PROJECT OVERVIEW

Business Request And Demand Overview:

The project aimed to deliver an executive sales reporting dashboard for sales managers. Following user stories were defined to align with business needs and ensure all acceptance criteria were met.

- Value of Change: Visual dashboards and improved sales reporting or follow up or sales force
- Tools : Power BI , MSSQL
- Additional Documents essential to Business Request : Budgets have been delivered in Excel for 2021

User Stories:

| # | As a (role) | I want (request / demand) | So that I (user value) | Acceptance Criteria |
|---|----------------------|--|---|---|
| 1 | Sales Manager | To get a dashboard overview of internet sales | Can follow better which customers and products sells the best | A Power BI dashboard which updates data once a day |
| 2 | Sales Manager | A comprehensive dashboard overview of internet sales | Can follow sales over time against budget | A Power BI dashboard with graphs and KPIs comparing against budget. |
| 3 | Sales Representative | A detailed overview of Internet Sales per Customers | Can segment, target and follow up Top and potential customers | A Power BI dashboard which allows me to filter data for each customer |
| 4 | Sales Representative | A detailed overview of Internet Sales per Products | Can follow up my Products that sells the most | A Power BI dashboard which allows me to filter data for each product |

ANALYSIS PROCESS:

Refined Problem Statement:

Develop a comprehensive sales dashboard to support sales reporting, highlighting top-performing customers, best-selling products, and key sales trends. The dashboard should incorporate dynamic filters to facilitate targeted decision-making across marketing, product strategy, and customer engagement.

Tools Used:

- SQL : Data Cleansing & Transformation
- Power BI: Data Modeling & Visualization

Data Cleansing & Transformation (SQL)

To support the creation of the data model required for analysis and to fulfill the defined user stories, the following tables(csv format) were extracted and prepared using SQL:

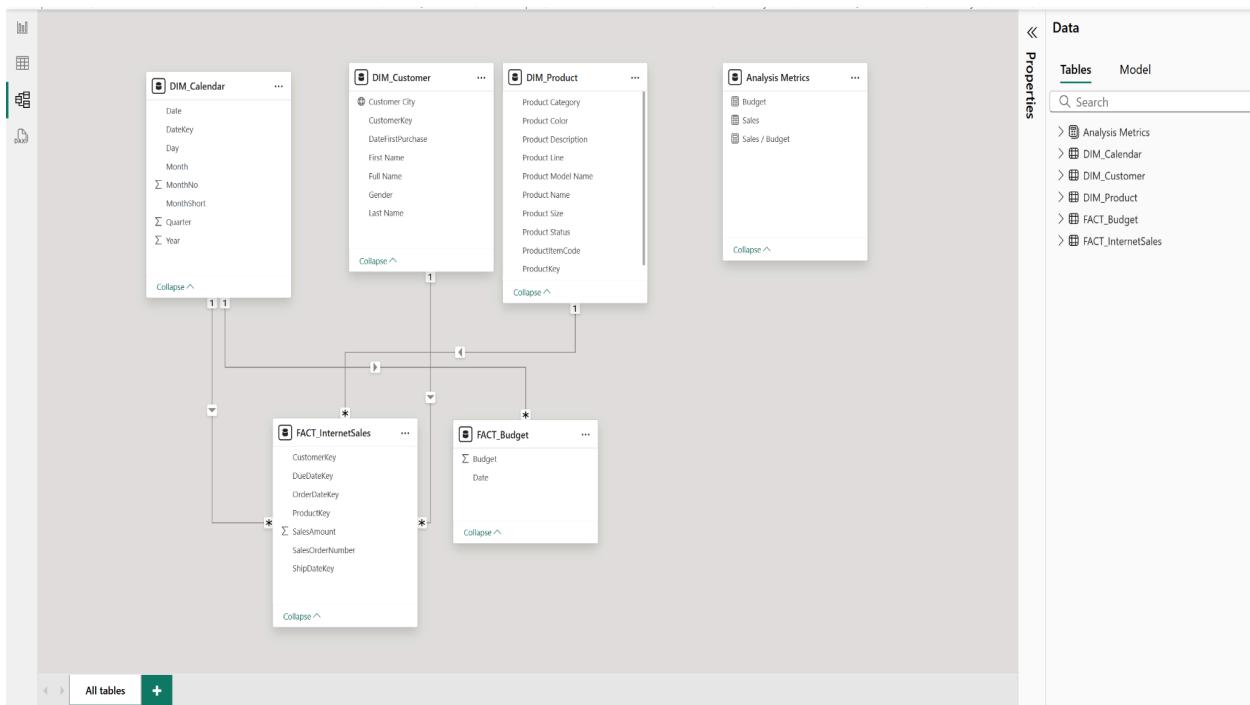
- **DIM_Calendar**
- **DIM_Customer**
- **DIM_Product**
- **FACT_InternetSales**

SQL scripts used for cleansing and transforming the necessary data are attached as separately within the project.

One data source — the Sales Budget — that was provided in Excel format and was integrated into the data model at a later stage of the process.

Data Model:

Below is a screenshot of the data model after the cleansed tables were loaded into Power BI.



The Budget table was integrated into the model as a Fact table and connected to FACT_InternetSales as well as the related Dim tables.

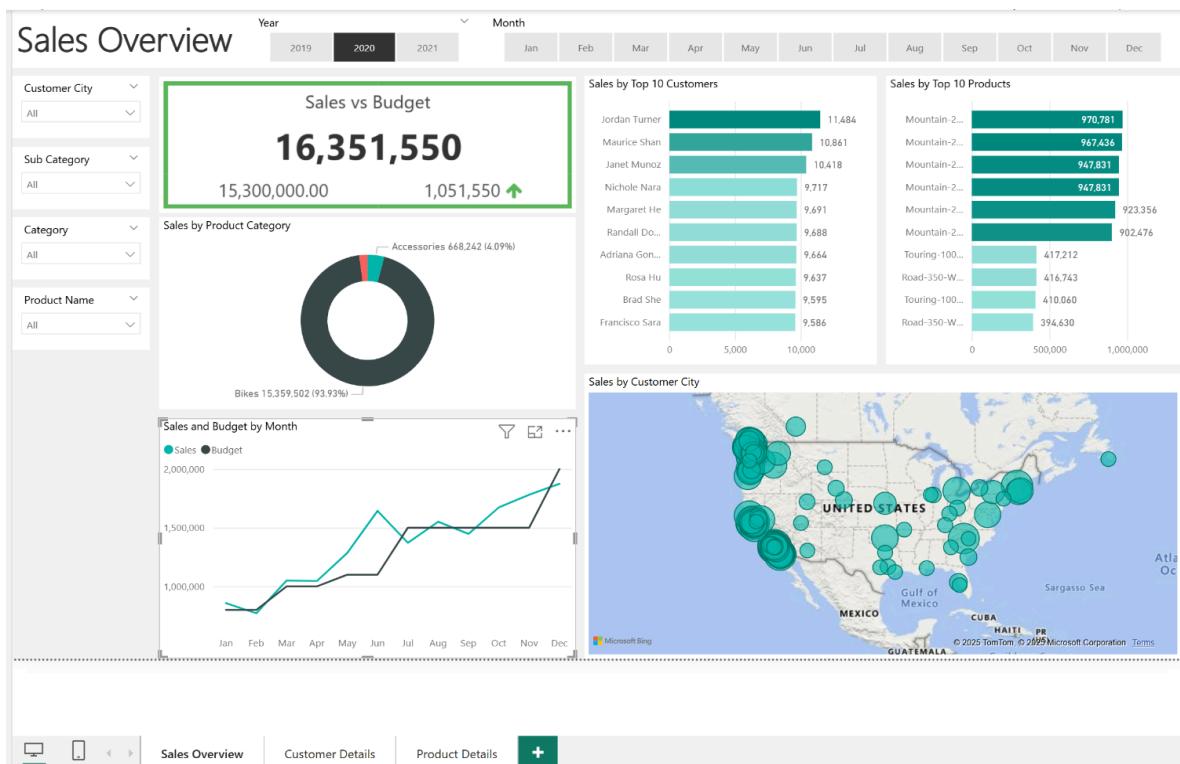
Sales Analysis & Management Dashboard

Attached are images of the final, comprehensive Sales Management Dashboard, consisting of three pages:

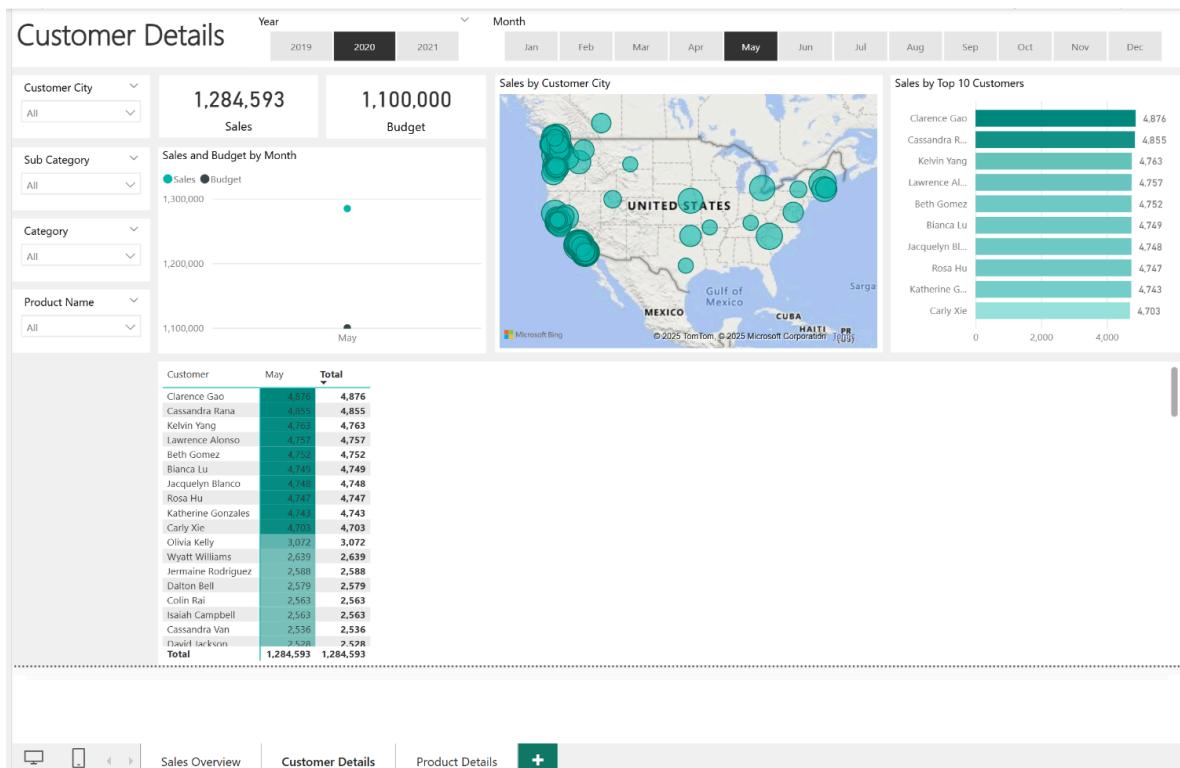
1. Sales Overview – A comprehensive dashboard summarizing key metrics.
2. Sales per Customer (Customer Details) – A detailed view of sales by customers.
3. Sales per Product (Product Details) – A breakdown of sales trends and figures by product.

These pages include visuals that present sales performance over time, by customer, and by product.

SALES OVERVIEW:



CUSTOMER DETAILS:



PRODUCT DETAILS:

