

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:

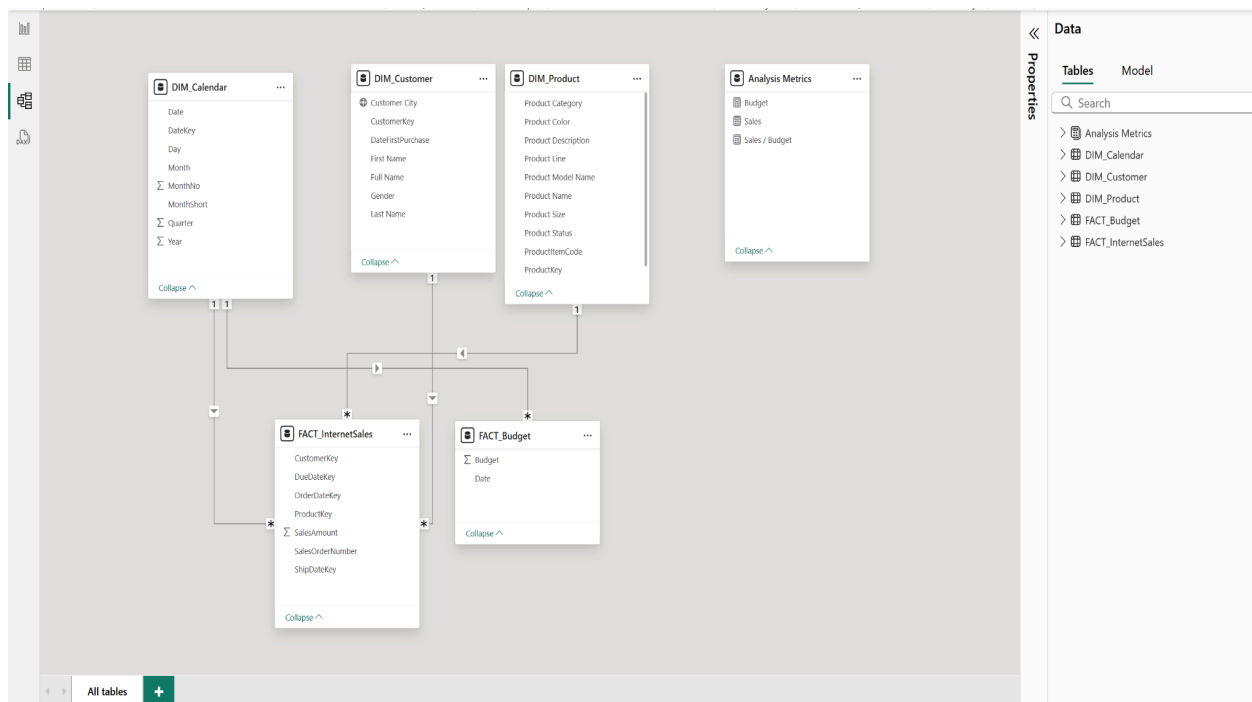
- **DIM_Calendar**
- **DIM_Customer**
- **DIM_Product**
- **FACT_InternetSales**

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.

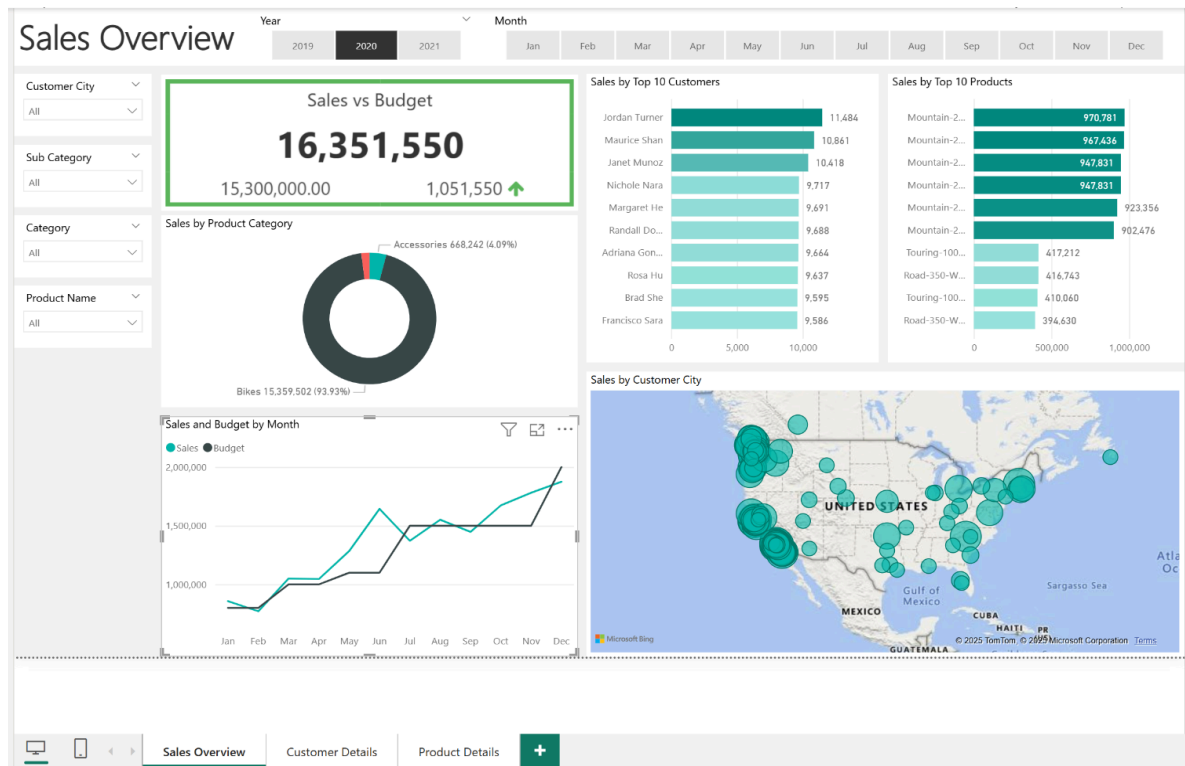
Sales Analysis & Management Dashboard

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

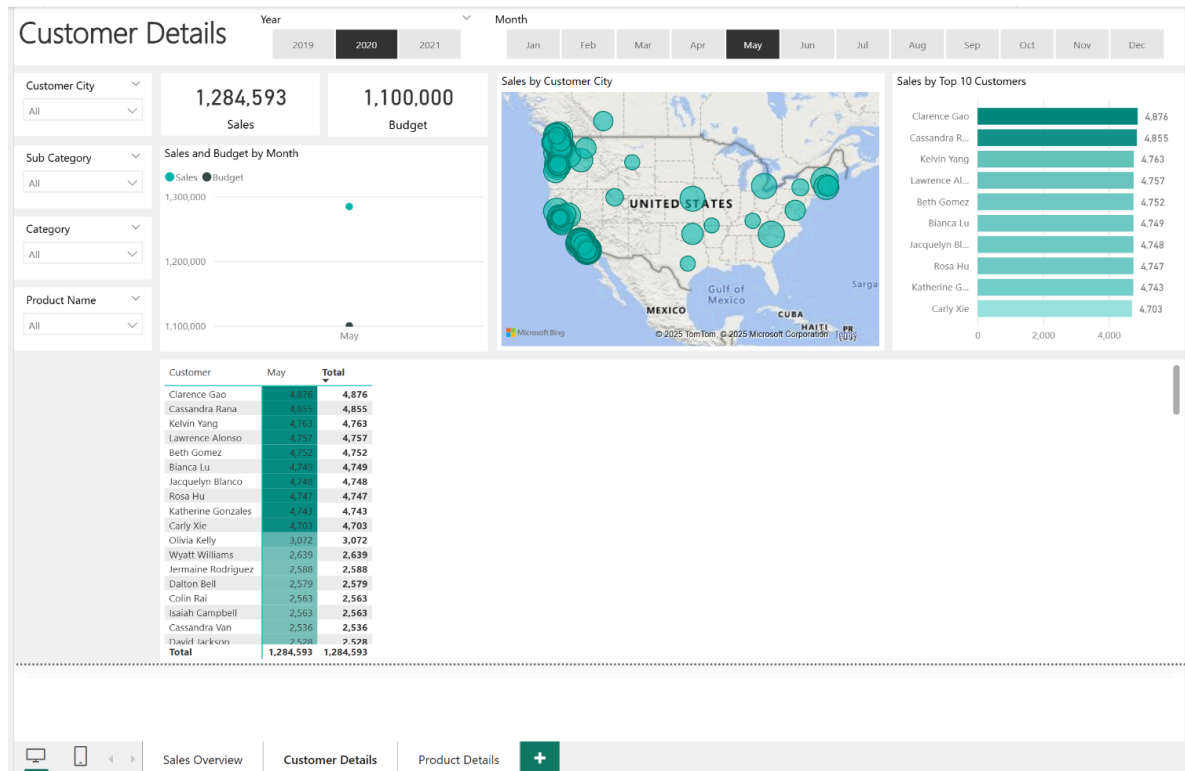
1. Sales Overview – A comprehensive dashboard summarizing key metrics.
2. Sales per Customer (Customer Details) – A detailed view of sales by customers.
3. Sales per Product (Product Details) – A breakdown of sales trends and figures by product.

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

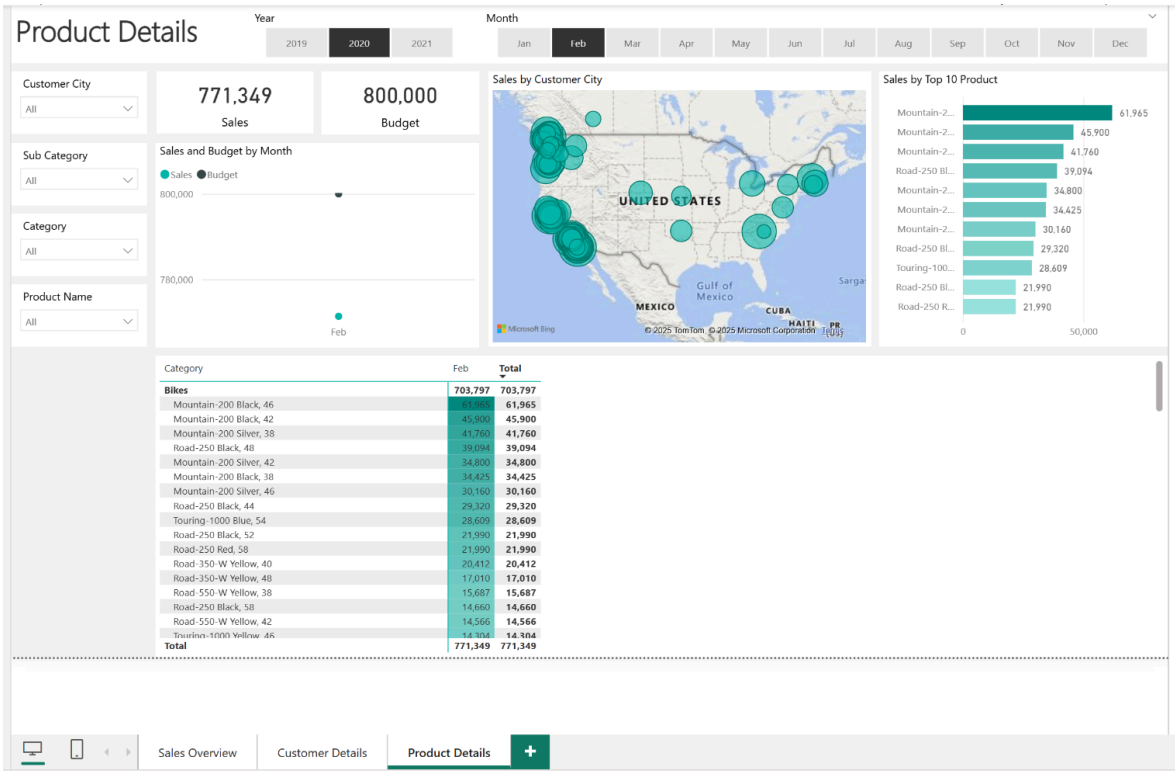
SALES OVERVIEW:



CUSTOMER DETAILS:



PRODUCT DETAILS:

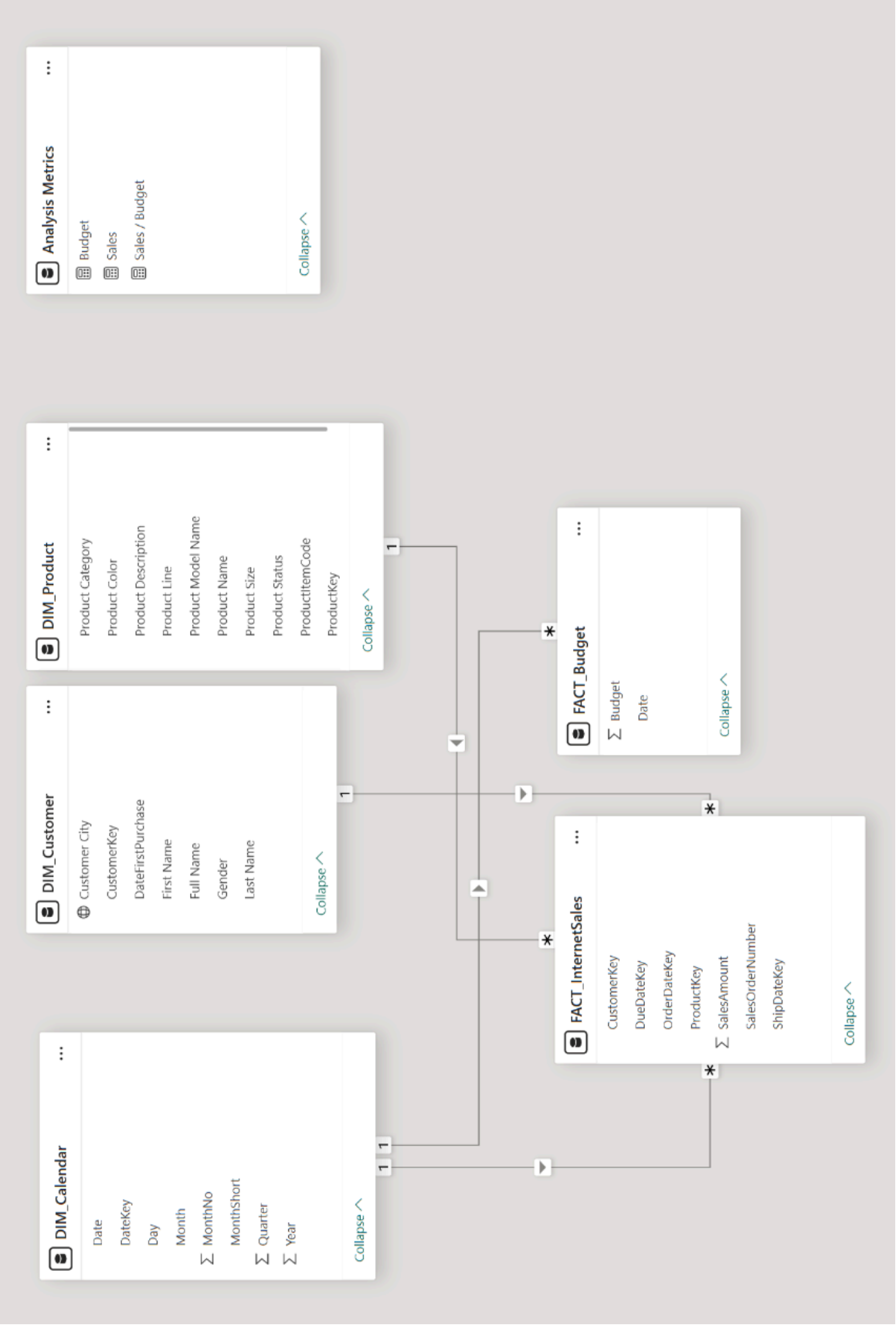


Category	Feb	Total
Bikes	703,797	703,797
Mountain-200 Black, 46	61,965	61,965
Mountain-200 Black, 42	45,900	45,900
Mountain-200 Silver, 38	41,760	41,760
Road-250 Black, 48	39,094	39,094
Mountain-200 Silver, 42	34,800	34,800
Mountain-200 Black, 38	34,425	34,425
Mountain-200 Silver, 46	30,160	30,160
Road-250 Black, 44	29,320	29,320
Touring-1000 Blue, 54	28,609	28,609
Road-250 Black, 52	21,990	21,990
Road-250 Red, 58	21,990	21,990
Road-350-W Yellow, 40	20,412	20,412
Road-350-W Yellow, 48	17,010	17,010
Road-550-W Yellow, 38	15,687	15,687
Road-250 Black, 58	14,660	14,660
Road-550-W Yellow, 42	14,566	14,566
Touring-1000 Yellow, 46	14,318	14,318
Total	771,349	771,349

Sales Overview

Customer Details

Product Details



Sales Overview

Year

2019

2020

2021

Month

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Customer City

All

Sub Category

All

Category

All

Product Name

All

Sales vs Budget

22,194,469

21,100,000.00

1,094,469 ↑

Sales by Product Category

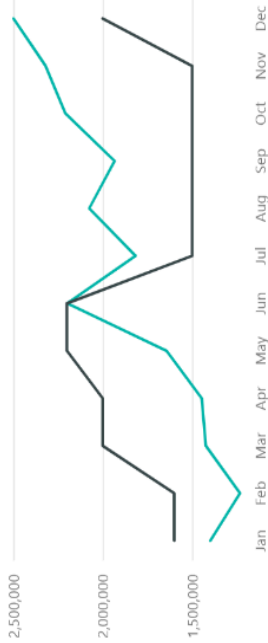
Accessories 700,760 (3.16%)



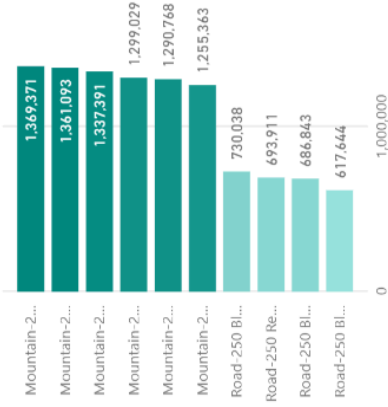
Bikes 21,153,936 (95.31%)

Sales and Budget by Month

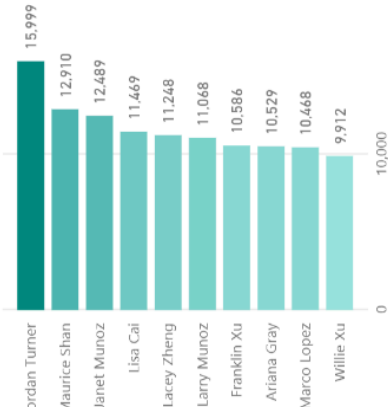
● Sales ● Budget



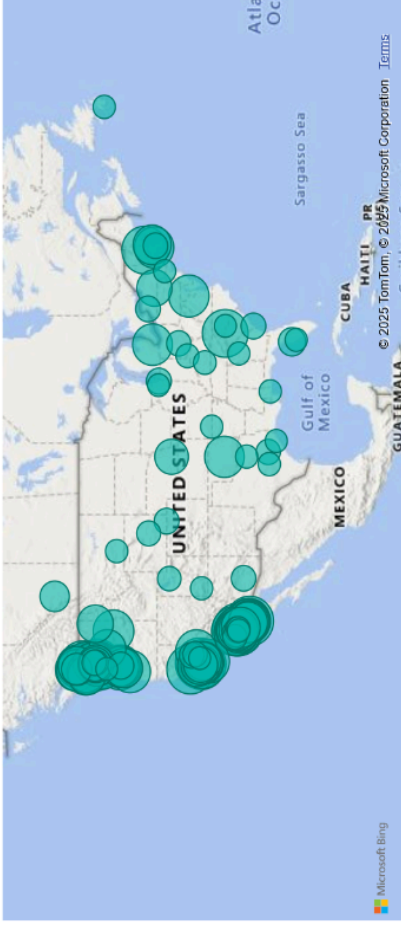
Sales by Top 10 Products



Sales by Top 10 Customers



Sales by Customer City



Sales Overview

Customer Details

Product Details

+

Customer Details

Year201920202021

MonthJanFebMarAprMayJunJulAugSepOctNovDec

Customer City

All

Sub Category

All

Category

All

Product Name

All

22,194,469

Sales

21,100,000

Budget

Sales and Budget by Month

Sales

Budget

2,000,000

1,000,000

Jan

Feb

Mar

Apr

May

Jun

Jul

Aug

Sep

Oct

Nov

Dec

Sales by Customer City

UNITED STATES

MEXICO

CUBA

HAITI

SARGA

Gulf of Mexico

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Microsoft Bing

Sales by Top 10 Customers

Jordan Turner

15,999

Maurice Shan

12,910

Janet Munoz

12,489

Lisa Cai

11,469

Lacey Zheng

11,248

Larry Munoz

11,068

Franklin Xu

10,586

Ariana Gray

10,529

Marco Lopez

10,468

Willie Xu

9,912

Customer	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Jordan Turner	2,377	2,443			2,355			540	2,433			5,311	15,999
Maurice Shan	4,885		2,322				1,269		2,384			2,049	12,910
Janet Munoz	4,876		3,122							2,419		2,071	12,489
Lisa Cai				708	811	554		2,588	2,049	2,428		2,330	11,469
Lacey Zheng	2,462					594	549	2,419				2,805	11,248
Larry Munoz	2,320				575	540		2,384	2,049			781	11,068
Franklin Xu								2,182	2,334	1,274		2,419	10,586
Ariana Gray		2,502							2,413			2,620	10,529
Marco Lopez		2,330							2,433				10,468
Willie Xu				777			2,071	2,375		2,295		2,393	9,912
Katrina Tang			2,443				2,440	2,433					9,796
Nichole Nara				2,494	2,322			2,480				2,419	9,717
Kaitlyn Henderson		2,508		2,295									9,716
Gabriella Collins		2,443							2,478				9,696
Margaret He		2,500				4,774							9,691
Randall Dominguez		4,864											9,688
Adriana Gonzalez		2,498		2,393						2,469			9,664
Isachun Yui		2,040			2,320					2,453			9,664
Isachun Yui					2,417					5,183			9,649
Total	1,398,749	1,233,081	1,423,390	1,446,358	1,643,471	2,198,338	1,816,234	2,074,983	1,933,673	2,208,453	2,318,876	2,498,862	22,194,469

Sales Overview

Customer Details

Product Details

