Superkirana Mini Plan: Power BI Dashboard Setup

This document outlines the steps to create a Power BI dashboard for the Superkirana Mini Plan, focusing on financial performance and operational efficiency. By following these steps, you can generate insights into franchise performance and make data-driven decisions for improving operations and profitability.

# Step 1: Prepare Your Data

Ensure that you have the necessary data fields loaded into Power BI. You will need the following for financial performance and operational efficiency dashboards:

* • Financial Data: Revenue, Costs, Profit Margin, Franchise ID, Date.
* • Operational Data: Inventory Turnover Rate, Delivery Times, Stockout Events, Orders Processed.

# Step 2: Create Visuals for Financial Performance

## 2.1 Line Chart for Revenue Trend

This chart shows how revenue is growing or declining over time.

1. In Power BI, go to the Report View.  
2. Select Line Chart from the Visualizations Pane.  
3. Drag Date to the X-axis.  
4. Drag Revenue to the Y-axis.  
5. Optionally, drag Franchise ID to the Legend if you want to show revenue trends for multiple franchises in the same chart.

## 2.2 Bar Chart for Profit Margin

This chart compares the profit margins of different Mini Plan stores.

1. In the Visualizations Pane, select Clustered Bar Chart.  
2. Drag Franchise ID to the Y-axis.  
3. Drag Profit Margin (%) to the X-axis.

## 2.3 Gauge for Break-even Analysis

This chart shows how close a store is to breaking even.

1. In the Visualizations Pane, select Gauge.  
2. Drag Revenue to the Value field.  
3. Set the Minimum value to 0.  
4. Set the Maximum value to your estimated break-even revenue.

# Step 3: Create Visuals for Operational Efficiency

## 3.1 Matrix Table for Inventory Turnover

The matrix table can display inventory turnover rates and other operational data for each franchise.

1. In the Visualizations Pane, select Matrix.  
2. Drag Franchise ID to the Rows.  
3. Drag Inventory Turnover Rate to the Values.  
4. Optionally, add Date to the Columns to view the data over time.

## 3.2 Bar Chart for Orders Processed

This chart compares the number of orders processed by different Mini Plan stores.

1. Select Clustered Column Chart from the Visualizations Pane.  
2. Drag Franchise ID to the X-axis.  
3. Drag Orders Processed to the Y-axis.

## 3.3 Stacked Bar Chart for Stockout Events

This chart shows how often each store runs out of stock.

1. In the Visualizations Pane, select Stacked Bar Chart.  
2. Drag Franchise ID to the Y-axis.  
3. Drag Stockout Events to the X-axis.

# Step 4: Set Up Filters and Interactivity

To make the dashboard interactive, add filters and slicers:

* • Add a Slicer: Go to the Visualizations Pane, select Slicer, and drag Date or Franchise ID into the slicer field to filter the dashboard by date or franchise.
* • Link Visuals: Enable interactions so that when you interact with one visual, it updates other related visuals.

# Step 5: Design and Layout

Arrange visuals on the report canvas for a clean and informative layout. Use cards and gauges for key financial metrics, and place operational efficiency visuals in the middle or bottom sections of the dashboard.

# Step 6: Publish the Dashboard

Once your visuals are complete, save the Power BI file (.pbix) and publish it to Power BI Service for sharing with your team. Set up scheduled data refreshes to keep the dashboard up-to-date.