SALES DASHBOARD – PROJECT DOCUMENTATION

Sales Dashboard Overview

Introduction:

- **Purpose:** The Sales Report dashboard provides an at-a-glance view of sales performance, enabling stakeholders to track key metrics such as total sales, profit, and profit margin. The dashboard also allows for analysis of sales trends, top-performing products, cities, and sales channels.

- **Audience:** The dashboard is designed for sales managers, executives, and analysts who need to monitor sales performance and make data-driven decisions.

- **Scope**: The dashboard covers sales data across different cities, products, and channels, with options to filter by year, city, product, and sales channel.

Data Sources:

- **Source Systems:** The data is sourced from internal sales databases, CRM systems, and financial reporting tools.

- **Data Refresh:** The data is updated on a [insert frequency here, e.g., daily, weekly] basis to ensure the dashboard reflects the most current sales performance.

- **Key Data Fields:**

  - **Total Sales:** Sum of all sales transactions within the selected filters.

  - **Total Profit:** The difference between total sales and cost of goods sold.

  - **Profit Margin:** Ratio of profit to total sales, indicating the profitability of sales activities.

  - **Products Sold:** Count of different products sold within the selected filters.

Key Metrics and KPIs:

- **Total Sales:** Displays the cumulative sales amount (e.g., $175.34K) within the selected time frame and filters.

- **Total Profit**: Shows the total profit (e.g., $79.83K) generated from sales.

- **Profit Margin:** Indicates the profitability (e.g., 0.46) as a ratio.

- **Products Sold:** Lists the total number of different products sold (e.g., 51).

Visualizations:

- **Sales by Month with PY Sales:** A bar chart showing current year sales compared to the previous year for each month.

- **Sales by Product with PY Sales**: A bar chart displaying sales by product name, comparing the current year to the previous year.

- **Sales by Product by Channel:** A bar chart showing sales distribution by product across different sales channels.

- **Top 5 Product by Sales:** A pie chart highlighting the top five products by sales volume, showing their share of total sales.

- **Top 5 City by Sales:** A pie chart that illustrates the top five cities by sales, providing insight into geographic performance.

- **Profit Vs LY by Channel:** A pie chart comparing current year profit to last year by sales channel.

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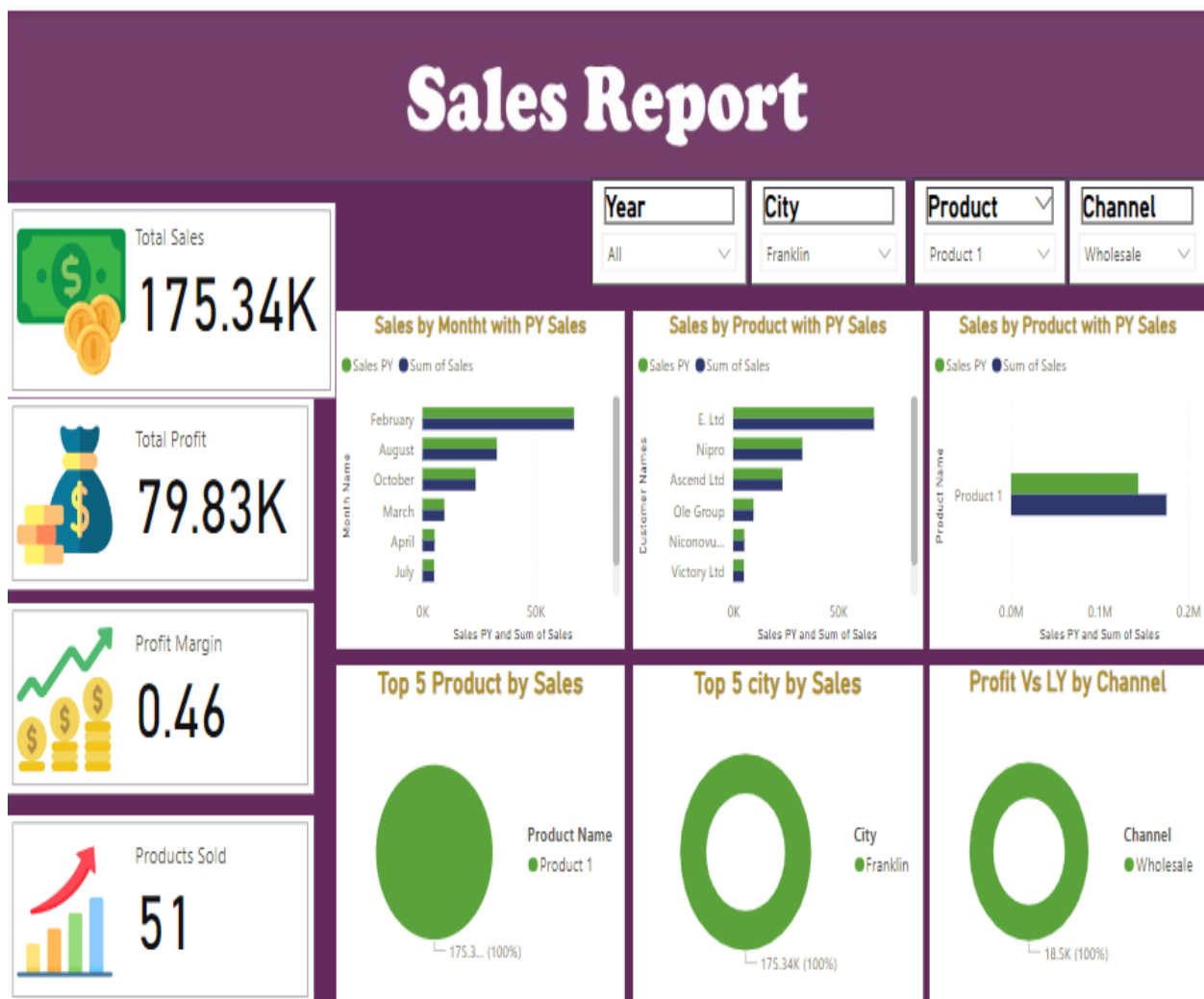
Filters and Interactivity:

- Year, City, Product, and Channel Filters: Users can select specific years, cities, products, and channels to focus on particular segments of sales data.

- Interactive Elements: Visuals are interconnected, allowing users to click on one element to see corresponding changes across other charts.

How to Use the Dashboard:

- **Accessing the Dashboard:** The dashboard is accessible via the Power BI platform. Users can log in with their credentials to view the latest data.

- **Interacting with Visuals:** Users can click on charts to drill down into specific details, such as viewing sales by a specific product or city.

- **Using Filters:** Apply filters by selecting options from the drop-down menus at the top of the dashboard to refine the data displayed.

Conclusion

- The Sales Report dashboard in Power BI is a powerful tool designed to provide comprehensive insights into your sales performance. By leveraging this dashboard, users can effectively monitor key metrics such as total sales, profit, and profit margins, while also gaining a deeper understanding of product performance, geographic trends, and channel effectiveness.

- With its user-friendly interface and interactive features, the dashboard enables sales managers and executives to make informed decisions that drive business growth. Regular use of this dashboard will help you stay on top of sales trends, quickly identify areas for improvement, and capitalize on opportunities in real time.