

6

DATA ANALYTICS JOURNEY

Calculating Fiscal Year Gross Revenue for a Specific Customer



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1

Business Problem

Problem Statement

How much gross revenue did a specific customer generate per fiscal year?

We need:

- Fiscal Year
- Total Gross Revenue
- Filter by Customer
- Correct yearly price mapping

2

Data Used

`fact_sales_monthly`

- date
- product_code
- sold_quantity
- customer_code

`fact_gross_price`

- product_code
- gross_price
- fiscal_year

Important Business Logic

Fiscal year derived from transaction date

Join on product + fiscal year

Multiply price × quantity

Aggregate by fiscal year

3

Fiscal Year Function Code

```
● ● ● -- BLOCK 1: Get raw sales data WITH january_sales AS (    SELECT product_id, SUM(quantity

1 CREATE FUNCTION get_fiscal_year (calendar_date DATE)
2 RETURNS INTEGER
3 DETERMINISTIC
4 BEGIN
5     -- Declare a variable to store the fiscal year
6     DECLARE fiscal_year INT;
7
8     -- Add 4 months to the given calendar date
9     -- This shifts Jan-Mar dates into the correct fiscal year
10    SET fiscal_year = YEAR(DATE_ADD(calendar_date, INTERVAL 4 MONTH));
11
12    -- Return the calculated fiscal year
13    RETURN fiscal_year;
14 END;
15
```

Logic:

Calendar Date → +4 Months → Extract Year →
Fiscal Year

4

SQL Query Used

```
• • •  
SELECT  
    -- Convert transaction date into fiscal year  
    get_fiscal_year(date) AS fiscal_year,  
  
    -- Calculate total gross revenue (price × quantity)  
    ROUND(SUM(g.gross_price * s.sold_quantity), 2) AS gross_price_total  
FROM fact_sales_monthly s  
  
    -- Join with gross price table to get correct price per fiscal year  
JOIN fact_gross_price g  
    ON s.product_code = g.product_code  
    AND g.fiscal_year = get_fiscal_year(s.date)  
  
    -- Filter data for a specific customer  
WHERE customer_code = 90002002  
  
    -- Aggregate results by fiscal year  
GROUP BY get_fiscal_year(date)  
  
    -- Show latest fiscal year first  
ORDER BY fiscal_year DESC;
```

5

Results & Business Impact

What does this analysis deliver?

- ✓ Fiscal year-wise gross revenue breakdown
- ✓ Accurate pricing aligned with yearly changes
- ✓ Clear customer performance comparison over time

This output enables reliable financial reporting and supports informed business decisions.

6

Skills Demonstrated

- SQL joins and aggregation
- Revenue calculation
- Fiscal year handling
- Query reusability
- Business-focused reporting

Question

How do you ensure pricing accuracy in your SQL revenue reports?

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Thanks!

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