ASSIGNMENT-08

SAMPLE DASHBOARD:

FINANCIAL DASHBOARD

Sum of Sale Price by Product

Discount Band	Sum of Sale Price	Sum of Units Sold	Sum of Discounts	Sum of Profit
High	28317	3,98,085.50	53,17,026.28	33,88,866.73
Low	21426	2,61,858.50	8,85,675.80	61,88,857.70
Medium	28260	3,79,698.50	30,02,546.16	55,79,522.84
None	4897	86,163.50	0.00	17,36,455.00
Total	**82900**	**11,25,806.00**	**92,05,248.24**	**1,68,93,702.26**

Sum of Units Sold by Segment

Segment	Units
Government	470.67K
Midmarket	172.18K
Enterprise	168.55K
Channel Partners	161.26K
Small Business	153.14K

Sum of Units Sold by Country

Sum of Profit by Year

3.88M (22.96%)

13.02M (77.04%)

Date Year
● 2013
● 2014
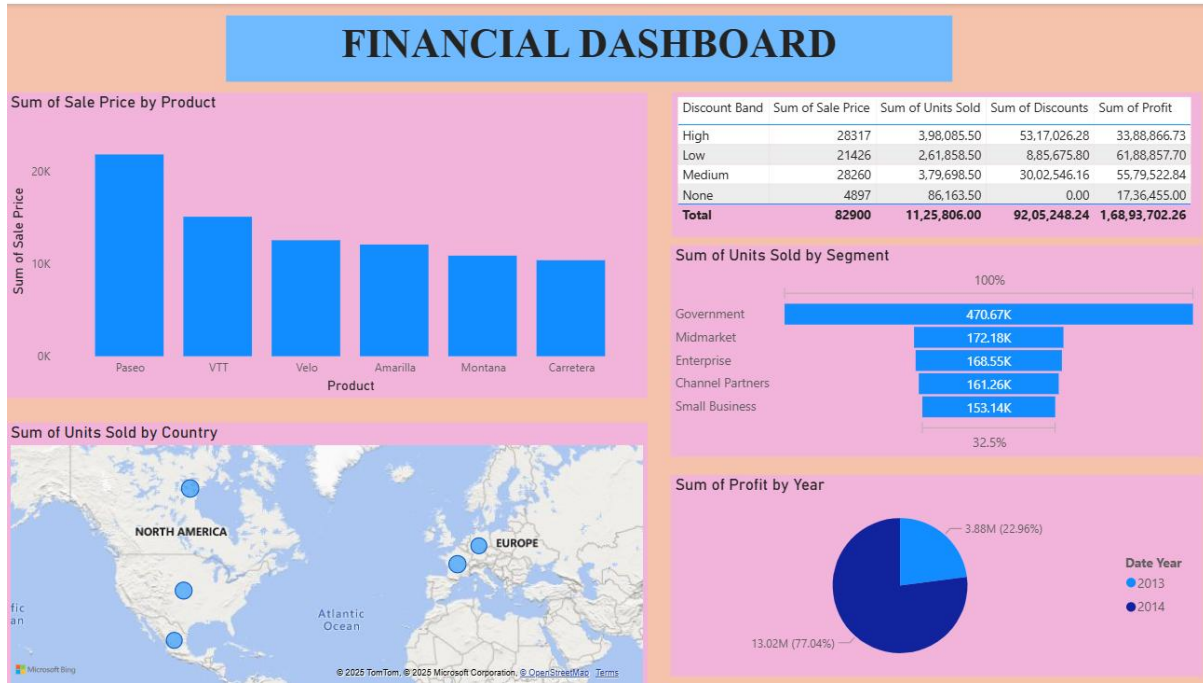
INSIGHTS:

1. Sales by Product

- **Top performer: Paseo** shows the highest total sale price (>20K), leading all other products.

- **Moderate performers:** VTT and Velo follow with medium sales figures.

- **Lowest performer: Carretera** records the least sales.

2. Discount Band Analysis

- **Medium discounts** generate the highest sale price (₹28,260) and second-highest profit, suggesting moderate discounts boost volume and profitability.

- **High discount** band also performs well in sales but shows lower profit margins than "Low" due to heavy discounting.

- **No discount** band gives a good profit percentage (₹17.36M) with zero discount, proving some customers buy without incentives.

3. Units Sold by Segment

- **Government segment** dominates with ~470K units—over double the next segment—indicating strong B2G demand.

- **Midmarket and Enterprise** contribute mid-level volumes.

- **Small Business and Channel Partners** show the lowest unit sales, highlighting growth potential.

4. Geography (Map Visual)

- **North America and Europe** are major sales hubs.

- Strong presence across both continents, with noticeable clusters in the US, parts of Canada, and key European nations.

5. Profit by Year

- **2014** contributed **77%** of total profit

STEPS:

1.Create Visuals

- **Bar Chart** (Sum of Sale Price by Product): *Axis – Product*, *Values – Sum of Sale Price*.

- **Table** (Discount Band Analysis): Add Discount Band, Sale Price, Units Sold, Discounts, and Profit columns.

- **Bar Chart** (Units Sold by Segment): *Axis – Segment*, *Values – Units Sold*.

- **Map Visual** (Units Sold by Country): *Location – Country*, *Values – Units Sold*.

- **Pie Chart** (Profit by Year): *Legend – Year*, *Values – Sum of Profit*.

2. Design the Layout

- Use a **2x3 grid layout** for clarity.

- Add a **title box** ("FINANCIAL DASHBOARD") at the top.

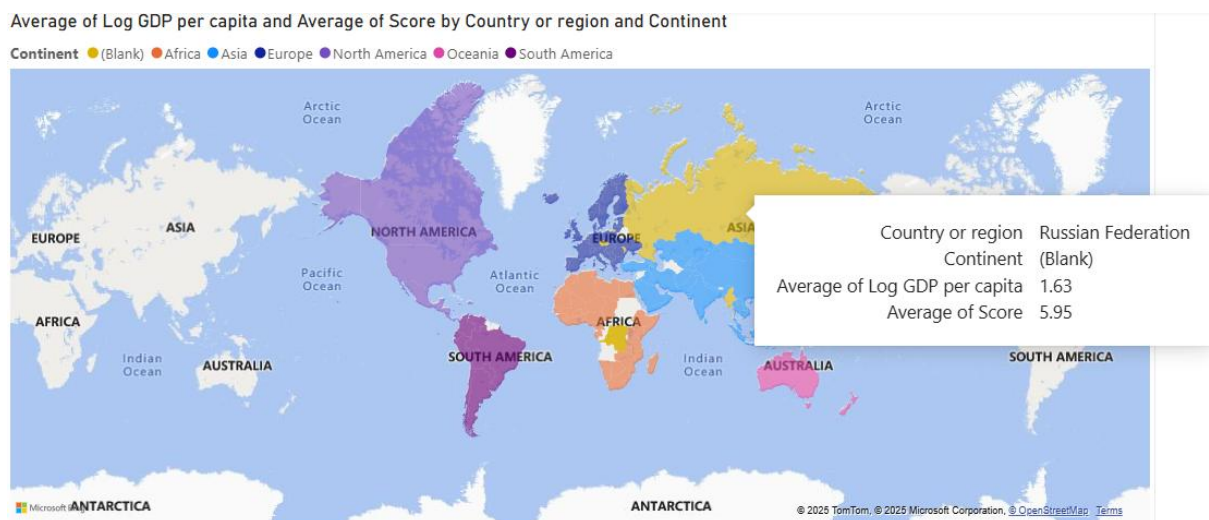- Use consistent colors (the sample uses pink background and blue bars) or corporate theme.

TOOLTIPS:

Tooltips are used to display extra information in the visual,there are two types of tooltips
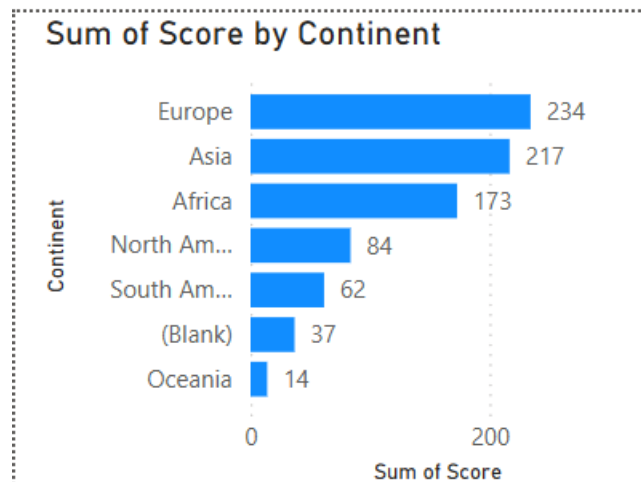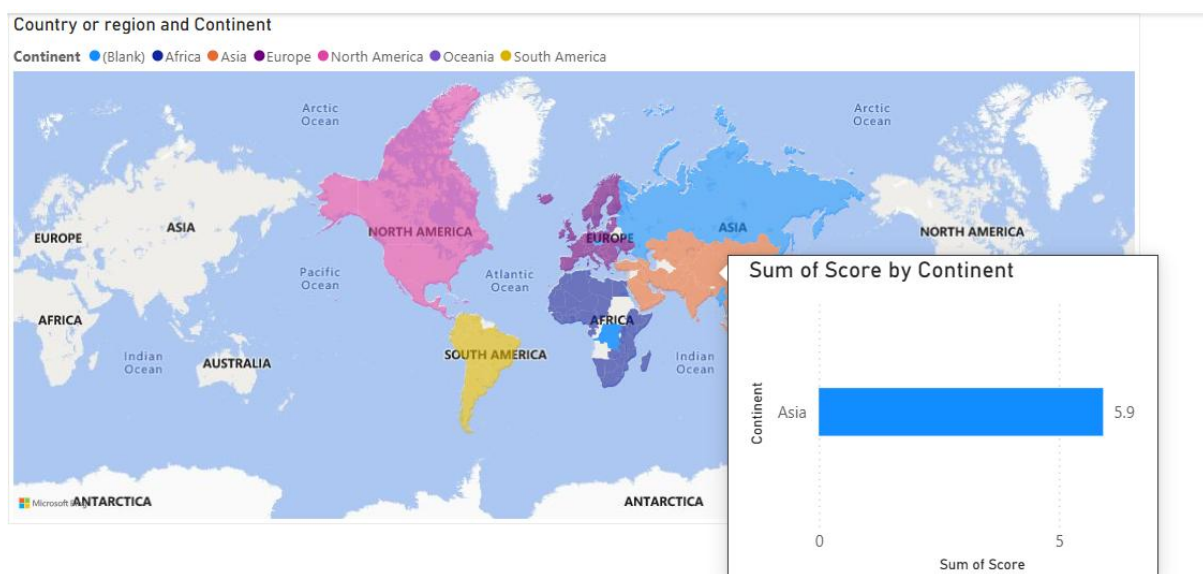
1.Text Tooltip

2.Visual Tooltip

TEXT TOOLTIP:

- Simply drag and drop any column in tooltip section to make it visible in the tooltip section.

VISUAL TOOLTIP:

Sum of Score by Continent

Continent	Sum of Score
Europe	234
Asia	217
Africa	173
North Am...	84
South Am...	62
(Blank)	37
Oceania	14

STEPS:

- Take a new page in the canvas and change the page from report to tool tip in canva general settings.
- Pick a column chart and plot score in x-axis and continent in y-axis
- Turn on the data labels.
- Name the tooltip as TT
- Go to general section and navigate to the tooltip enable TT
- Now we can use this tooltip as visual tooltip in other charts.

- Go to the tooltip section in settings and TT as tooltip.

TEAM MEMBER PERFORMANCE:

Project Name	Sectors	Shortlisted team	Total Project Revenue
New Satelite launch	IT	Karan Ram (Analyst)	136400
New Satelite launch	IT	Vijay Roy (Analyst)	136400
New Satelite launch	IT	Arjun Joshi (Software)	136400
New Satelite launch	IT	Krishna Das (MIS)	136400
New Satelite launch	IT	Laxmi Nayak (Analyst)	136400
New Satelite launch	IT	Ganesh	136400
Janm Hit	Service	Darshana Nair (MIS)	120800
Janm Hit	Service	Rajkumar Joshi (analyst)	120800
Janm Hit	Service	Ajay Kumar(MIS)	120800
Janm Hit	Service	Ganesh	120800
Invest India	Service	Disha Jhah (Analyst)	299100
Invest India	Service	Rohini patak (Software)	299100
Expand Reach	Telecom	Jsy Naik (Analyst)	184400
Expand Reach	Telecom	Krishna /dao (MIS)	184400
Expand Reach	Telecom	Ajay Kumar (MIS)	184400
Self Employ	IT	Ajay Kumar (MIS)	246600
Self Employ	IT	Karan Ram (Analyst)	246600
Self Employ	IT	Rajkumar Joshi (analyst)	246600
Connect large	Telecom	Jay Naik (Analyst)	281100
Connect large	Telecom	Rajkumar Joshi (analyst)	281100
Connect large	Telecom	Rohini patak (Software)	281100
Connect large	Telecom	Vijay Roy(Analyst)	281100
5G All	Telecom	Rohini Patak (Software)	74800
5G All	Telecom	Rohit Misra (software)	74800
Tech Launc	IT	Vijay Roy (Analyst)	214000
Tech Launc	IT	Karan Ram (Analyst)	214000
Tech Launc	IT	Rajkumar Joshi (analyst)	214000

STEPS:

- We have the data to be imported into power BI in excel file.
- Now create the new file and get data from excel file and load into the power bi.
- The data in team members is unstructured and we can transform it into structured.

- Go to home page and choose transform data and the data gets opened in power query.
- Select the column shortlisted team and select the split column
- Use split using delimiter and in advanced options selects rows.
- The data in the column gets split into the rows.