Legacy Car Sales Dashboard — Report Documentation

1. Overview of the Report

The Legacy Car Sales Dashboard is a two-page Power BI report designed to help leadership, analysts, and operational teams monitor sales performance, analyse regional and product trends, and investigate individual transactions. The dashboard contains:

- **Overview Page** – Executive KPIs, trends, geographical insights, and company-level performance.
- **Details Page** – Full transaction-level data for audits, customer support, compliance, and root-cause analysis.

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2. KPI Definitions

2.1 YTD Total Sales

Total revenue generated from all car sales from the start of the year to date.

2.2 MTD Total Sales

Total revenue generated from car sales from the start of the current month to date.

2.3 YTD YOY Sales Growth

Percentage change between current Year-to-Date total sales and previous Year-to-Date total sales.

2.4 YTD vs PTYD Sales Difference

Absolute difference in YTD sales compared to the same period last year.

2.5 YTD Average Price

Average selling price of vehicles calculated over all Year-to-Date transactions.

2.6 MTD Average Price

Average selling price calculated for the current month-to-date.

2.7 YOY Avg Price Change

Percentage change in average selling price compared to Previous Year-to-Date.

2.8 YTD vs PTYD Avg Price Difference

Absolute difference between current YTD average price and previous YTD average price.

2.9 YTD Cars Sold

Total number of vehicles sold from the beginning of the year until today.

2.10 MTD Cars Sold

Total vehicles sold from the beginning of the current month.

2.11 YOY Cars Sold Growth

Year-over-year percentage increase or decrease in total units sold.

2.12 YTD vs PTYD Units Sold Difference

Absolute difference in unit volume when compared to previous YTD.

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3. Filters & Slicers

3.1 Body Style

Filter sales based on car categories such as SUV, Sedan, Hatchback, Passenger, Hardtop, etc.

3.2 Dealer Name

Filter KPIs and visuals by specific dealership or showroom.

3.3 Transmission

Filter between Automatic, Manual, or other transmission types.

3.4 Engine

Filter based on engine type (e.g., V6, V8, Electric, Hybrid, etc.).

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4. Visuals & What They Show

Overview Page

- **Top KPI Cards:** YTD/MTD Sales, Avg Price, Cars Sold, YoY metrics.
- **Weekly Trend Line Chart:** Shows YTD sales fluctuation across 52 weeks.
- **YTD Sales by Body Style:** Highlights which categories contribute the most revenue.
- **YTD Sales by Colour:** Shows colour preference trends across the customer base.
- **Dealer Region Map:** Bubble map reflecting regional performance based on YTD cars sold.
- **Company-Wise Sales Grid:** Displays company-level YTD metrics (Avg Price, Cars Sold, Total Sales, % Contribution).

Details Page

- **Transaction Table:** A fully searchable table showing
  - Car ID

- Date
- Customer Name
- Dealer Name
- Company
- Colour
- Model
- Total Sales
- ...and more
  Used for audits, verifications, customer follow-ups, and detailed analysis.

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5. How to Use the Dashboard for Common Business Tasks

5.1 Monthly Performance Review (Leadership & Finance)

Goal: Review current performance vs expected monthly/annual targets.

Steps:

1. View **YTD & MTD KPIs** at the top of the Overview page.
2. Check **YOY growth indicators** (green/red) for early warnings.
3. Examine the **YTD Weekly Trend** to spot unusual spikes/dips.
4. Use the **filters** (especially Dealer/Body Style) to isolate the month's performance drivers.
5. Review the **Company-Wise Grid** to see which brands lead or lag.

Outcome: A clear view of the company's financial and sales health for the month.

5.2 Regional Deep-Dive (Regional Managers, Operations)

Goal: Identify high-performing and underperforming regions.

Steps:

1. Use the **Dealer Region Map** to identify bubble sizes and geographical concentration.
2. Hover or click regions to see relative YTD Cars Sold.
3. Apply the **Dealer Name filter** for more granular investigation.
4. Cross-reference with **Body Style and Colour** visuals to see regional preferences.
5. Review the **Company-Wise Sales Grid** to compare brand performance by region.

Outcome: A targeted view of which regions need support, inventory adjustments, or promotions.

5.3 Product Mix / Inventory Planning (Product, Sales Planning Teams)

Goal: Understand which models, body styles, or colours require stocking priority.

Steps:

1. Analyse **YTD Sales by Body Style** to spot dominant and slow categories.
2. Review **YTD Sales by Colour** to understand customer preferences.
3. Filter by **Dealer Region** to match regional inventory with demand.
4. Check **Average Price trends** to verify pricing stability for each segment.

Outcome: Better inventory planning and demand forecasting.

5.4 Transaction-Level Lookup (Service, Compliance, Audit Teams)

Goal: Quickly find any specific car sale or customer record.

Steps:

1. Go to the **Details Page**.
2. Use the table's search and column filters to locate a record by:
   - Car ID
   - Customer Name
   - Dealer
   - Company
   - Model
3. Cross-verify values with Overview metrics for quality checks.
4. Export the filtered table segment if needed for reporting.

Outcome: Faster audits, warranty processing, and customer-service follow-ups.

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6. Best Practices for Users

- Always apply slicers before performing deep analysis.
- Use **drilldown**, **hover tooltips**, and **filters** to uncover additional context.
- Compare KPIs with YoY and PTYD differences to detect underlying trends.
- Validate any anomalies using the **Details Page** for row-level clarity.
- Use the report in full-screen mode during reviews for better visibility.

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7. Conclusion

This dashboard enables Legacy to move from raw data to insight-driven decision-making. With clear KPIs, dynamic filters, and drillable visuals, teams across leadership, operations, product, and support can monitor performance, diagnose issues, and take action with confidence.