

Sales, Payments & Customer Analytics Dashboard

Transforming three raw Excel sheets into a fully automated BI system using Excel VBA and Power BI. From manual data processing to intelligent, real-time analytics in one streamlined solution.



From Manual Chaos to Automated Intelligence

The Starting Point

Only 3 Raw Sheets

- Main Order Sheet
- Payments Received
- Pre-Paid Packages

No structure, completely manual workflows, and highly error-prone processes that consumed hours of valuable time.

After VBA Automation

11+ Auto-Generated Reports

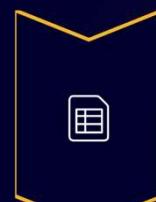
- Package Orders
- Paid Orders
- Pending Delivery Orders
- Delivered With/Without Payment
- Balance Pending
- Advance Payments
- Total Adjustments
- Customer Outstanding Summary

One Refresh Button → All Pages Auto-Rebuilt Instantly



The Data Transformation Workflow

Our automated pipeline seamlessly converts unstructured data into business intelligence-ready insights through a sophisticated three-stage process.



Raw Data Input

Unorganized data with no KPIs, requiring manual filtering and not ready for business intelligence tools.



VBA Processing

Intelligent automation applies business rules, classifies orders and payments, computes balances, and generates structured tables.



BI-Ready Output

Clean, validated datasets with standardized column structures, fully prepared for Power BI relationships and DAX calculations.



Comprehensive Power BI Dashboard

Three powerful analytics pages provide complete visibility into sales performance, customer payments, and package revenue streams.

Sales & Payments

Comprehensive view of total orders, net sales, and amount paid with payment mode breakdowns.

- Daily order trends
- Top outstanding customers
- Payment method analysis

Outstanding & Risk

Customer payment risk assessment with aging analysis and geographic distribution.

- Outstanding age buckets
- Risk classification table
- Area-wise mapping
- DAX-powered summaries

Package Revenue

Deep dive into package sales performance and usage patterns.

- Total packages sold
- Revenue by package type
- Sales rep performance
- Upsell opportunities

Project Impact & Delivery Excellence

What We Accomplished

- Transformed 3 raw files into an enterprise-grade analytics system
- Built 11+ auto-generated operational reports using Excel VBA
- Created fully validated BI-ready datasets
- Designed a comprehensive 3-page Power BI dashboard
- Established a completely automated reporting pipeline

Technical Stack

Excel VBA • Power BI • DAX Modeling • Data Transformation

48

Hours

Full solution delivered for real client

11+

Reports

Auto-generated from source data

3

Pages

Comprehensive BI dashboard

Ready to Transform Your Data? View the complete dashboard on GitHub or connect for custom BI solutions tailored to your business needs.

