**New Project Request from Manager.**

Hi, Analtics Team.

I hope all is well during this pendamic. Management has decided to make improvement in our internal sales reports and we have decided to shift to Power BI dashboard.

Business Question we have are :

We want to know how much we sold and what product to which client. And it progress over time (years).

Analyze our sales staf work on different products and customers. It should also include the functionality of filtering the data .

Compare our value against performance and measure number against the budget.

The present year is 2021, for same we have budget. Management wants to look for two years of analytics for sales to prepare new strategies and decisions.

**Business Demand Overview:**

* Reporter: Adam– Sales Manager
* Value of Change: Visual dashboards and improved Sales reporting or follow up or sales force
* Necessary Systems: Power BI, CRM System
* Other Relevant Info: Budgets have been delivered in Excel for 2021

**User Stories:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **No #** | **As a (role)** | **I want (request / demand)** | **So that I (user value)** | **Acceptance Criteria** |
| **1** | Sales Manager | To get a dashboard overview of internet sales | Can follow better which customers and products sells the best | A Power BI dashboard which updates data once a day |
| **2** | Sales Representative | A detailed overview of Internet Sales per Customers | Can follow up my customers that buys the most and who we can sell ore to | A Power BI dashboard which allows me to filter data for each customer |
| **3** | Sales Representative | A detailed overview of Internet Sales per Products | Can follow up my Products that sells the most | A Power BI dashboard which allows me to filter data for each Product |
| **4** | Sales Manager | A dashboard overview of internet sales | Follow sales over time against budget | A Power Bi dashboard with graphs and KPIs comparing against budget. |

Data Requirement –

To Acomplist the above business demand we need the following tables.

1. Date Table
2. Customer Table
3. Product Table
4. Internet Sales Fact Table

Setp 1 – Data Collection from Company Data Warehouse, Cleaning and Transformation data for analysis.

1. Date Dimension table cleaning

/\*\*\*\*\*\* Script for Filtering Date Dimension for Sales Analytics from Data Set \*\*\*\*\*\*/

SELECT [DateKey]

,[FullDateAlternateKey] AS Date

,[EnglishDayNameOfWeek] AS Day

,[EnglishMonthName] AS Month

,LEFt([EnglishMonthName],3) as MonthName

,[MonthNumberOfYear] AS MonthNumber

,[CalendarQuarter] AS Quarter

,[CalendarYear] AS Year

FROM [AdventureWorksDW2014].[dbo].[DimDate]

WHERE

CalendarYear >= 2019

1. Customer Dimension table cleaning

/\*\*\*\*\*\* Script for Cleaning Customer Query \*\*\*\*\*\*/

SELECT c.[CustomerKey] AS CustomerKey

,c.[FirstName] AS [First Name]

,c.[LastName] AS [Last Name]

--full name --

,c.[FirstName] + ' ' + [LastName] AS [Full Name],

CASE c.[Gender] WHEN 'M' THEN 'MALE' WHEN 'F' THEN 'FEMALE' END AS Gender

,c.[DateFirstPurchase] AS [DateFirstPurchase]

,g.[City] AS [Customer City]

,g. [EnglishCountryRegionName] AS [Country]

FROM [AdventureWorksDW2014].[dbo].[DimCustomer] AS c

LEFT JOIN [AdventureWorksDW2014].[dbo].[DimGeography] AS g on g.[GeographyKey] = c.[GeographyKey]

ORDER BY

[CustomerKey] ASC

1. Product Dimension table cleaning

/\*\*\*\*\*\* Script for product table \*\*\*\*\*\*/

SELECT

p.[ProductKey]

,p.[ProductAlternateKey] AS [ProductItemCode]

,p.[EnglishProductName] AS [Product Name]

-- Get the product Sub Category

,ps.[EnglishProductSubcategoryName] AS [Product Sub-Category]

-- Get Product Category

,pc. [EnglishProductCategoryName] AS [Product Category]

,p.[Color] AS [Product Color]

,p.[Size] AS [Size]

,p.[ProductLine] AS [Product Line]

,p.[ModelName] AS [Product Model Name]

,p. [EnglishDescription] AS [Product Description]

,ISNULL(p.[Status],'Outdated') AS [Product Status]

FROM [AdventureWorksDW2014].[dbo].[DimProduct] AS p

-- First join the product table with Sub Category table

LEFT JOIN [AdventureWorksDW2014].[dbo].[DimProductSubcategory] AS ps ON

ps.[ProductSubcategoryKey] = p.[ProductSubcategoryKey]

-- then join the Sub Category table with Category table

LEFT JOIN [AdventureWorksDW2014].[dbo].[DimProductCategory] AS pc ON

ps.[ProductCategoryKey] = pc.[ProductCategoryKey]

ORDER by p.[ProductKey] ASC

1. Internet Sales Fact table cleaning

/\*\*\*\*\*\* Script for Cleaning Internet Sales Table \*\*\*\*\*\*/

SELECT [ProductKey]

,[OrderDateKey]

,LEFT([OrderDateKey],4) AS OrderYear

-- To Extract Order year.

,[DueDateKey]

,[ShipDateKey]

,[CustomerKey]

,[SalesOrderNumber]

,[SalesAmount]

FROM [AdventureWorksDW2014].[dbo].[FactInternetSales]

WHERE

-- To Extract Internet Sales of last 2 year from present year.

-- We use YEAR(GETDATE()) function to get present date.

LEFT([OrderDateKey],4)>= YEAR(GETDATE())-2

ORDER BY

[OrderDateKey] ASC

## Link For Published Dashboard

<https://app.powerbi.com/groups/me/reports/30001d95-8432-4759-a85d-169e6ef46853?ctid=5585330f-9739-4fc3-9558-6526f2590536&pbi_source=linkShare>