

DATA ANALYSIS WITH POWER BI PROJECT REPORT

(Project Semester: August – December 2024)

RETAIL SALES PERFORMANCE DASHBOARD

An Analytical Study of Customer Behavior and Sales Trends (2023–2025)

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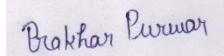
DECLARATION

I, **Prakhar Purwar**, student of **B.Tech Computer Science and Engineering** under the Discipline of CSE at Lovely Professional University, Punjab, hereby declare that the work presented in this project report titled "**Retail Sales Performance Analysis Dashboard**" is an authentic record of my own work carried out under the guidance of my faculty mentor.

The data, analysis, visualizations, and insights presented in this report are original and have not been submitted elsewhere for the award of any degree or diploma.

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ACKNOWLEDGEMENT

I would like to express my sincere gratitude to **Lovely Professional University** for providing a structured academic environment, state-of-the-art infrastructure, and continuous academic support that enabled the successful completion of this Data Science minor project. The university's emphasis on practical learning and industry-oriented curriculum played a significant role in shaping the analytical approach adopted in this work.

I extend my heartfelt thanks to my **faculty guide**, whose constant guidance, valuable suggestions, and constructive feedback throughout the project lifecycle were instrumental in refining both the technical and analytical aspects of this study. Their mentorship helped me align theoretical concepts with real-world business applications and maintain academic rigor in the project execution.

I would also like to acknowledge the contribution of **modern data analytics and visualization tools**, which facilitated effective data exploration, insight generation, and dashboard development. These tools enabled the transformation of complex datasets into meaningful business intelligence, strengthening my understanding of data-driven decision-making.

Furthermore, I am grateful to my **peers and classmates** for their collaborative discussions, idea exchanges, and moral support during various stages of the project. Lastly, I sincerely thank my **family** for their constant encouragement, patience, and motivation, which provided the foundation needed to complete this project successfully.

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1. INTRODUCTION

In the contemporary business environment, data has emerged as one of the most valuable organizational assets. With the rapid growth of digital transactions, customer touchpoints, and product diversification, retail organizations are generating massive volumes of data on a daily basis. However, the true value of this data lies not merely in its collection, but in its effective analysis and interpretation to support strategic decision-making. This project, titled "**Retail Sales Performance Analysis Dashboard**", is designed to address this critical need by transforming raw retail data into actionable business insights.

Retail businesses operate in a highly competitive and dynamic market where understanding customer behavior, product performance, and sales trends is essential for sustained growth. Traditional reporting mechanisms often fail to provide a consolidated and real-time view of performance indicators, making it difficult for decision-makers to respond proactively to market changes. In this context, data analytics and interactive dashboards play a crucial role in enabling organizations to monitor key metrics, identify patterns, and uncover hidden opportunities.

The primary objective of this project is to develop a comprehensive and interactive sales performance dashboard that provides a holistic view of retail operations across multiple dimensions such as **time, customer segments, product categories, geographical regions, and purchasing behavior**. The dashboard covers a multi-year period from **2023 to 2025**, allowing for both short-term performance tracking and long-term trend analysis. This temporal coverage supports informed planning, performance benchmarking, and forecasting-oriented thinking.

Through the integration of descriptive analytics and visual storytelling, the dashboard presents complex data in a simplified and intuitive manner. Key performance indicators such as total revenue, total orders, average ratings, and revenue per customer are highlighted to offer a quick executive-level overview. At the same time, detailed drill-down analyses enable deeper exploration into product-level performance, customer demographics, and monthly sales variations. This layered analytical approach ensures that the dashboard caters to both strategic stakeholders and operational users.

From an academic perspective, this project demonstrates the practical application of data science concepts including data preprocessing, aggregation, analytical reasoning, and visualization techniques. From a business standpoint, it simulates a real-world retail intelligence solution that can support decision-making related to inventory planning, customer targeting, product optimization, and revenue growth strategies.

Overall, this project bridges the gap between theoretical knowledge and real-world business application by showcasing how data-driven insights can enhance operational efficiency and strategic clarity in the retail domain. The outcomes of this analysis emphasize the growing importance of analytics-driven dashboards as indispensable tools in modern business ecosystems.

2. SCOPE OF THE ANALYSIS

The scope of this project is strategically designed to deliver a comprehensive understanding of retail sales performance by leveraging data analytics and visualization techniques. The analysis focuses on converting transactional retail data into meaningful insights that can support both **operational monitoring** and **strategic decision-making**.

This project primarily emphasizes **descriptive and diagnostic analytics**, enabling stakeholders to understand *what has happened* and *why it happened* across different business dimensions. The scope is intentionally kept broad to reflect real-world retail analytics scenarios while remaining aligned with academic objectives.

Key Areas Covered in the Analysis

2.1 Sales Performance Analysis

This analysis focuses on evaluating the overall sales performance of the retail business over a multi-year period from **2023 to 2025**. Key performance indicators such as total revenue, total number of orders, and average order-related metrics are examined to assess business growth and operational efficiency.

By analyzing sales data across different time periods, the study identifies long-term growth patterns, short-term fluctuations, and peak sales periods. This helps in understanding how sales performance varies over time and provides a strong foundation for strategic planning and performance benchmarking.

2.2 Customer-Centric Analysis

Understanding customer behavior is a critical component of retail analytics. In this project, customers are categorized into different segments such as **regular, new, and premium customers**. The analysis evaluates each segment's contribution to overall revenue and order volume.

This approach enables a clear assessment of customer value distribution and engagement levels. By identifying high-value customer segments, the analysis supports data-driven decisions related to customer retention, targeted marketing, and personalized business strategies.

2.3 Product and Category Performance Analysis

The project includes an in-depth evaluation of product performance at multiple levels, including **product categories, product types, and individual products**. This analysis helps in identifying top-performing products as well as categories that contribute significantly to total revenue.

Such insights are essential for optimizing product portfolios, improving inventory planning, and aligning business offerings with customer demand. The analysis also highlights underperforming segments, enabling informed corrective actions.

2.4 Time-Based Trend Analysis

Time-based analysis is conducted to examine monthly and yearly sales trends. This allows for the identification of seasonal patterns, demand cycles, and variations in customer purchasing behavior throughout the year.

By understanding these temporal trends, businesses can plan promotions, manage inventory more effectively, and prepare for peak demand periods. This analysis adds strategic value by linking historical performance with future planning considerations.

2.5 Geographical and Brand Analysis

The scope of the project also extends to analyzing revenue distribution across different **countries and brands**. This analysis provides insights into regional performance and brand dominance in various markets.

Such geographical and brand-level insights support market expansion strategies, regional targeting, and brand positioning decisions, helping businesses allocate resources more effectively.

2.6 Business Insights and Strategic Recommendations

Based on the outcomes of all analytical components, key business insights are derived to support high-level decision-making. The analysis identifies **top-performing categories, peak sales months, and high-revenue products**, which serve as inputs for strategic recommendations.

These insights bridge the gap between raw data analysis and real-world business application, demonstrating how analytical findings can be translated into actionable strategies for revenue growth and operational improvement.

3. EXISTING SYSTEM

In traditional retail environments, sales analysis and performance evaluation are primarily carried out using **manual reporting methods** and basic spreadsheet-based tools. These systems rely heavily on static reports generated periodically, such as daily, monthly, or quarterly sales summaries. While such approaches provide a basic overview of business performance, they lack the flexibility and depth required for comprehensive data-driven decision-making.

The existing system generally involves collecting sales data from multiple sources and consolidating it into spreadsheets or simple reporting tools. Decision-makers depend on predefined tables and static charts to review performance metrics. Any additional analysis or comparison often requires manual intervention, increasing dependency on technical teams or analysts.

Furthermore, traditional systems offer limited support for multi-dimensional analysis. Evaluating sales performance across various parameters such as customer segments, product

categories, time periods, and geographical regions becomes time-consuming and inefficient. As a result, identifying hidden patterns, trends, or anomalies in the data is challenging.

In the absence of interactive dashboards, stakeholders are unable to explore data dynamically or drill down into specific business areas. This restricts real-time insight generation and slows down the overall decision-making process, which is a significant drawback in today's fast-paced retail landscape.

3.1 Drawbacks and Limitations of the Existing System

Despite being widely used, the existing system suffers from several limitations:

- **Lack of Interactivity:** Static reports do not allow users to explore data dynamically or apply filters for deeper analysis.
- **Time-Consuming Analysis:** Manual data processing and report generation increase effort and delay insight delivery.
- **Limited Scalability:** Traditional tools struggle to handle large datasets efficiently as business data grows.
- **Delayed Decision-Making:** Insights are often generated after significant time gaps, reducing their relevance.
- **High Dependency on Technical Resources:** Non-technical stakeholders rely on analysts for customized reports.
- **Poor Visualization Capabilities:** Basic charts fail to convey complex patterns and relationships effectively.

These limitations highlight the need for a **modern, dashboard-driven analytical system** that enables real-time insights, better visualization, and faster decision-making—gaps that this project aims to address.

4. SOURCE OF DATASET

The dataset used for this project is a **structured retail sales dataset** specifically prepared for analytical and visualization purposes. The dataset was provided in **CSV format** and represents transactional retail data covering a multi-year period from **2023 to 2025**. It contains comprehensive information related to customer behavior, product details, sales transactions, and revenue generation.

The dataset includes both **categorical and numerical attributes**, making it suitable for exploratory data analysis, aggregation-based analytics, and dashboard development. Key data fields capture essential business dimensions such as customer type, product category, product name, country, brand, order status, payment method, ratings, and sales values. Time-based attributes such as order date, month, and year enable trend and seasonal analysis.

This dataset serves as a reliable foundation for performing **descriptive and diagnostic analytics**, allowing the identification of sales patterns, customer preferences, and product

performance across different time periods and regions. The availability of multiple business variables enables multi-dimensional analysis, which is critical for developing an interactive retail performance dashboard.

Before being used for analysis, the dataset was reviewed to understand its structure, completeness, and relevance to the project objectives. Minor data quality issues such as missing values, inconsistent formatting, and redundant records were identified and addressed during the preprocessing phase to ensure analytical accuracy and consistency.

Overall, the dataset is well-suited for academic analysis and effectively supports the objectives of this project by enabling meaningful insights into retail sales performance and customer behavior.

5. DATA PREPROCESSING AND CLEANING

Data preprocessing was carried out using a systematic and step-by-step approach to ensure data accuracy, consistency, and analytical readiness. Since the raw retail dataset contained missing values, inconsistent formats, redundant columns, and data quality issues, multiple transformation steps were applied before proceeding with analysis and dashboard creation.

5.1 Source and Initial Formatting

The dataset was imported from a CSV file as the primary data source. After loading the data, headers were promoted to ensure proper column identification. Data types for each column were reviewed and modified wherever required to ensure compatibility with analytical and calculation operations.

5.2 Date Cleaning and Standardization

Several transformations were applied to standardize the date field:

- Special characters in the date column were replaced to maintain uniform formatting.
- Leading and trailing spaces were removed using trim and clean operations.
- Date values were split into day, month, and year components.
- A new **Day** column was created and reordered for clarity.
- A merged date column combining day, month, and year was generated.
- The new merged column was converted into **Date data type**.
- The original date column was removed, and the newly created column was renamed as **Date**.

This ensured consistent and error-free time-based analysis.

5.3 Handling Missing and Null Values

To maintain data completeness, missing values were handled using appropriate domain-specific logic:

- Missing values in the **Year** column were filled using the median value.
- Null values in **Total Purchases** were replaced with the mean value (5).
- Missing values in **Gender** were filled with “*Unknown*”.
- Null values in **Age** were replaced with the average value (35), followed by data type correction.
- Blank values across categorical columns were replaced with “*Unknown*”.
- Missing values in **Ratings** were replaced with a neutral value (3).
- Blank values in **Payment Method** were replaced with “*Net Banking*”.

These steps helped preserve dataset size while maintaining realistic data distributions.

5.4 Column Transformation and Feature Engineering

To enhance analytical usability:

- The original **Total Amount** column was removed and recalculated using relevant fields.
- A new **Total Amount** column was created, reordered, converted to decimal type, and rounded off.
- Data types for **Total Purchases**, **Day**, and **Year** were corrected.
- Monetary values were rounded to improve readability and consistency.

5.5 Data Cleaning and Standardization

Additional cleaning steps were applied to improve data quality:

- Zip codes were standardized by replacing invalid values with 0.
- Feedback values were replaced with “*Not Given*” where missing.
- Phone number inconsistencies were corrected.
- Text fields were trimmed to remove unnecessary spaces.
- Invalid and erroneous rows were filtered and removed.
- Blank rows, top unwanted rows, and error rows were eliminated.
- Data was sorted to maintain logical order.

5.6 Column Restructuring and Custom Columns

To improve structural clarity:

- The original **Shipping Method** column was removed and replaced with a custom column with standardized values.
- Pending statuses were assigned where required.
- The **Feedback** column was recreated using a custom column approach to ensure uniformity.
- Columns were reordered multiple times to maintain logical sequencing.

5.7 Conditional Logic and Final Validation

A conditional column was added to classify records based on defined business rules. Final validation checks were performed to ensure:

- No remaining null or blank values
- Correct data types across all columns
- Consistent formatting suitable for dashboard analysis

✓ Outcome of Preprocessing

After applying the above preprocessing steps, the dataset became:

- Clean, structured, and free from errors
- Consistent in formatting and data types
- Optimized for aggregation and visualization
- Fully ready for exploratory analysis and dashboard development

The screenshot shows the Microsoft Power BI Data Editor interface. The main area displays a table with 30 rows of data, each containing columns for Transaction ID, Customer ID, Name, Email, Phone Number, and Address. The right-hand pane contains several tabs: Properties, Applied Steps, and Preview Settings. The Applied Steps tab is expanded, listing numerous data cleaning and transformation actions taken during the preprocessing phase, such as removing columns, adding custom columns, and replacing values. The ribbon at the top provides navigation and transformation tools like Home, Transform, Add Column, View, Tools, and Help.

6. DATA MODELLING

Data modelling in this project was performed at a **basic analytical level** to support aggregation, filtering, and visualization rather than predictive forecasting. Since the primary objective of the project is to analyze historical retail sales data and present insights through an interactive dashboard, advanced machine learning models were not applied.

The modelling approach focused on structuring the dataset in a way that enables efficient analysis across multiple business dimensions such as time, customer segments, product categories, and geographical regions.

6.1 Analytical Data Model Structure

The cleaned dataset was organized using a **flat-table analytical model**, where each record represents a single transaction. This structure allows direct aggregation and slicing of data without the need for complex relational joins. The model includes:

- **Fact variables** such as Total Amount, Total Purchases, and Ratings
- **Dimension variables** such as Date, Customer Type, Product Category, Product Name, Country, Brand, Gender, and Payment Method

This structure supports fast query performance and seamless dashboard interaction.

6.2 Derived Measures and Calculations

To support analysis, several calculated measures were used:

- Total Revenue (sum of total amount)
- Total Orders (count of transactions)
- Average Rating
- Revenue by Category, Product, and Country
- Time-based aggregations (monthly and yearly summaries)

These measures form the backbone of the dashboard's KPI indicators and charts.

6.3 Modelling Justification

The chosen modelling approach is appropriate for:

- Descriptive and diagnostic analytics
- Business performance evaluation
- Interactive visualization and reporting

Since the focus of this project is insight generation rather than prediction, advanced modelling techniques such as regression or classification were considered out of scope and reserved for future enhancement.

7. ANALYSIS ON DATASET

This section presents a detailed analysis of the retail dataset using interactive dashboards and visual analytics. The objective of this analysis is to extract meaningful insights related to sales performance, customer behavior, product trends, and overall business outcomes. The analysis is organized into multiple sub-sections to ensure clarity and systematic interpretation of results.

7.1 Introduction

The analysis phase focuses on transforming the cleaned and structured dataset into actionable insights through visual exploration. By applying aggregation techniques and interactive filters, the dashboard enables multi-dimensional analysis across time, customer segments, product categories, and geographical regions.

The findings presented in this section are derived from carefully designed visualizations that simplify complex data patterns and support data-driven decision-making.

7.2 General Description of Analysis

The dataset was analyzed using multiple analytical perspectives to provide a holistic view of retail operations. The dashboard is divided into logical analytical views that include:

- Overall sales performance metrics
- Customer-related insights
- Product and category-level analysis
- Time-based and geographical trends
- Business insights and strategic observations

Each analytical view highlights key performance indicators and trends that are relevant for both operational monitoring and strategic planning.

7.3 Specific Requirements, Functions, and Measures

To perform effective analysis, several measures and calculations were applied:

- **Total Revenue:** Sum of total sales amount
- **Total Orders:** Count of completed transactions
- **Average Rating:** Mean of customer ratings
- **Customer Segmentation:** Classification into regular, new, and premium customers
- **Time-Based Measures:** Monthly and yearly aggregations
- **Category and Product Measures:** Revenue contribution by product and category

These measures form the foundation of all visualizations used in the dashboard.

7.4 Analysis Results

7.4.1 Sales Performance Analysis

The sales performance analysis provides an overview of overall business health. Key performance indicators reveal steady revenue generation across the observed period, with noticeable peaks during specific months. This indicates the presence of seasonal demand patterns and promotional impacts.



Insight:

Sales growth is consistent over time, with certain months contributing disproportionately to total revenue, indicating high-demand periods.



7.4.2 Customer-Centric Analysis

Customer analysis highlights the contribution of different customer segments to overall revenue. Premium customers, though fewer in number, contribute a significant portion of total sales, while regular and new customers drive volume-based growth.

Insight:

High-value customers play a critical role in revenue generation, emphasizing the importance of customer retention and loyalty programs.

7.4.3 Product and Category Performance Analysis

This analysis evaluates product categories and individual products to identify top-performing segments. Certain categories dominate revenue contribution, while specific products emerge as consistent best-sellers.



Insight:

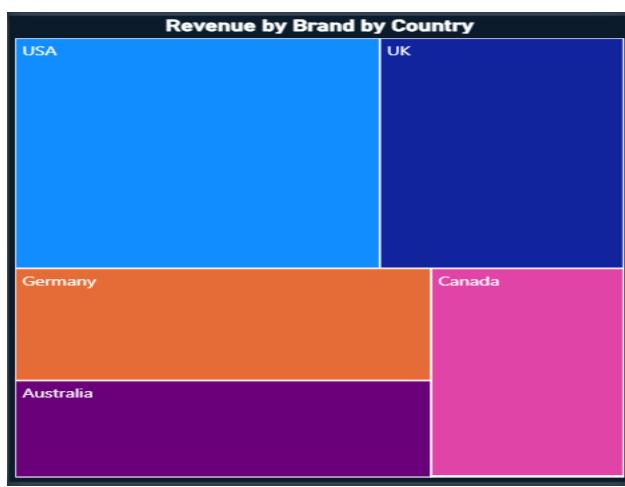
A small number of products and categories account for a large share of revenue, supporting the Pareto principle in retail sales.

7.4.4 Time-Based Trend Analysis

Monthly and yearly trend analysis reveals fluctuations in sales across different time periods. Peaks in sales correspond to seasonal trends, while lower-performing months indicate opportunities for targeted marketing strategies.

Insight:

Time-based analysis supports demand forecasting and inventory planning by identifying peak and off-peak periods.



7.4.5 Geographical and Brand Analysis

Geographical analysis shows variation in revenue contribution across different countries, while brand-level analysis highlights dominant brands in the market.

Insight:

Certain regions and brands consistently outperform others, providing opportunities for focused regional expansion and brand promotion strategies.

7.5 Visualization

Visualizations play a vital role in simplifying complex datasets and enhancing interpretability. The dashboard uses:

- KPI cards for quick performance overview
- Line charts for trend analysis
- Bar charts for category comparison
- Donut charts for customer segmentation
- Tree maps for hierarchical revenue distribution

These visual elements enable users to interact with data dynamically and gain insights efficiently.

8. LIST OF ANALYSIS WITH RESULTS

Multiple analyses were conducted on the retail dataset to evaluate overall business performance and extract meaningful insights. Each analysis focused on a specific business dimension and

collectively contributed to a comprehensive understanding of sales behavior and customer dynamics.

The **sales performance analysis** revealed that the business experienced consistent revenue generation over the observed period. Certain months contributed significantly more to total revenue, indicating the presence of seasonal demand patterns. These peak periods highlight opportunities for targeted promotions and inventory planning to maximize revenue.

The **customer-centric analysis** showed clear differences in revenue contribution across customer segments. Premium customers, although smaller in number, contributed a higher share of overall revenue, while regular and new customers accounted for a larger transaction volume. This finding emphasizes the importance of customer retention strategies and loyalty-focused initiatives.

Analysis of **product categories** demonstrated that a limited number of categories dominated total sales. These high-performing categories played a crucial role in driving overall revenue, while some categories showed comparatively lower performance, indicating potential areas for optimization or repositioning.

The **product performance analysis** identified specific products that consistently outperformed others in terms of sales contribution. A small group of products generated a substantial portion of total revenue, reflecting the Pareto principle commonly observed in retail environments. This insight supports focused inventory and marketing strategies around best-selling products.

The **time-based trend analysis** highlighted monthly and yearly variations in sales. Clear fluctuations were observed throughout the year, with certain periods showing higher customer engagement and purchasing activity. These trends provide valuable inputs for forecasting, seasonal planning, and promotional scheduling.

Through **geographical analysis**, differences in revenue contribution across countries were observed. Some regions emerged as dominant markets, contributing significantly to total sales, while others showed moderate or low performance. This insight can support region-specific business strategies and market expansion decisions.

The **brand analysis** revealed that certain brands consistently outperformed others in revenue generation. Strong brand performance indicates customer preference and brand loyalty, which can be leveraged through strategic partnerships and promotional campaigns.

An analysis of **payment methods** indicated a higher preference for digital payment options compared to traditional methods. This reflects changing consumer behavior and highlights the importance of offering seamless digital payment experiences.

Finally, the **ratings and feedback analysis** showed that overall customer ratings were positive. This suggests a satisfactory customer experience and product quality, while also identifying opportunities for service improvement based on feedback patterns.

9. FUTURE SCOPE

While this project successfully delivers meaningful insights into retail sales performance through descriptive and diagnostic analytics, there are several opportunities to further enhance and extend its scope in the future. With the growing importance of data-driven decision-making, this project can be scaled and upgraded to address more advanced business requirements.

One significant area of future enhancement is the integration of predictive analytics. Machine learning models such as regression or time-series forecasting can be applied to predict future sales trends, customer demand, and revenue growth. This would enable businesses to move from reactive analysis to proactive planning.

The project can also be extended to include customer lifetime value (CLV) analysis and churn prediction. By identifying high-risk customers and estimating long-term customer value, organizations can design targeted retention strategies and personalized marketing campaigns.

Another potential enhancement is the incorporation of real-time data integration. Connecting the dashboard to live databases or APIs would allow continuous data updates, enabling near real-time monitoring of sales performance and operational metrics.

The analytical scope can further be expanded by integrating external datasets, such as market trends, competitor pricing, or economic indicators. This would provide a more holistic view of the retail ecosystem and improve strategic decision-making.

From a technical perspective, the dashboard can be deployed as a web-based business intelligence solution, making it accessible to multiple stakeholders across different locations. Role-based access control can also be implemented to ensure data security and governance.

Finally, advanced visualization techniques and automation features such as automated reporting, alerts, and recommendation systems can be incorporated to improve usability and executive decision support.

Overall, these enhancements would transform the current analytical dashboard into a comprehensive, enterprise-level retail intelligence system capable of supporting long-term business growth and innovation.

10. CONCLUSION

This project successfully demonstrates the practical application of data analytics and visualization techniques to analyze retail sales performance using **Microsoft Power BI**. By transforming raw transactional data into an interactive and structured dashboard, the project highlights how data-driven insights can support informed business decision-making.

Through systematic data preprocessing, modeling, and analysis, the project provides a comprehensive view of key business dimensions such as sales trends, customer behavior, product performance, and geographical contribution. The dashboard enables stakeholders to quickly monitor key performance indicators, identify high-performing segments, and understand seasonal and behavioral patterns within the retail dataset.

The analysis reveals that sales performance is influenced by multiple factors including customer segmentation, product categories, time-based trends, and regional demand. The use of interactive visualizations ensures that complex datasets are presented in a simplified and intuitive manner, enhancing interpretability and usability.

Overall, this project bridges the gap between theoretical knowledge and real-world application by showcasing how business intelligence tools like Power BI can be effectively used for retail analytics. The outcomes of this study emphasize the importance of clean data, well-defined measures, and meaningful visual storytelling in deriving actionable insights from data.

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ANNEXURE

Annexure A: Tools and Technologies Used

- **Power BI Desktop** – Data modeling, visualization, and dashboard development
- **Power Query** – Data cleaning, transformation, and preprocessing
- **CSV Dataset** – Retail sales transactional data
- **Microsoft Excel** – Initial data review and validation
- **Windows OS** – Development environment

Annexure B: Key Features of the Dashboard

- Interactive KPI cards for quick performance overview
- Dynamic filters and slicers for year, category, customer type, and country

- Visual representations including line charts, bar charts, donut charts, and tree maps
- User-friendly layout designed for both technical and non-technical stakeholders

Annexure C: Limitations of the Project

- The analysis is based on historical data only
- Predictive and prescriptive analytics are not implemented
- Real-time data integration is not included
- External market or competitor data is not considered

13. PROJECT & LINKEDIN DETAILS

Dataset Link:

<https://www.opendatabay.com/data/consumer/327c5b3c-9f40-45bb-a79b-d5e2c9abc68a>

LinkedIn Project Post:

https://www.linkedin.com/posts/prakharpurwar_powerbi-dataanalytics-businessintelligence-activity-7407132693257392129-cS2U?utm_source=share&utm_medium=member_desktop&rcm=ACoAAD1lepQBKHPOcR7SK1cnnQjxHFAwOxohrTw

Project Screen Shots:



