

Steps for the Dashboard Sales Data MADE BY: RUQAIYA ARIF

Objectives:

- This Dashboard is based on the Exploratory Data Analysis on a Sales Dataset from the perspective of the business.
- I have figured the individual and collective contribution of each product, employee and supervisor to the overall internal sales generated by the company.

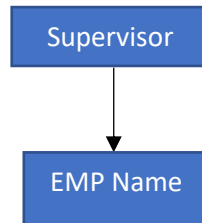
Steps to achieve Objective:

- Clean and transform the dataset to make it more reliable.
- Establish relationships between all tables.
- Create filters to drill down based upon product and employee.
- Determine sales by revenue and number of units sold.
- Determine the revenue generated under each supervisor.
- Diagnose daily growth in revenue.
- Determine individual products revenue.
- Create a drill down table with relevant columns.
- Incorporate easy buttons for better UX.

Note: I have used PowerBI color scheme esthetics.

1. Get data Sales Data.xls from :C:\Users\ruqaiya rangwala\Desktop\projects\Power BI Projects\End-to-End Sales Dashboard
2. Data has 3 tables: **Emp Master, Product Master, and Sales Data.**
3. Click the **checkbox of all table** and then **click Transform Data.**
4. Changed the **Data type** of **Price per unit** column of **Product Master** Table into **Fixed decimal number** aka Currency.
5. **Close and apply the changes.**
6. In main dashboard there are 3 types of views: **Report view, Data view, Model view.**
7. **In Model view, relationships are built automatically by PowerBI by scanning common columns in different tables.**
8. **However, these connections can be made manually and can be deleted manually.**
9. Relationships in PowerBI are very flexible, this is because it let's you consider 2 table which are connected through a relationship as a 1 table.
10. In this data set, we are calculating **Revenue** by using **Unit sold** from **Sales Data table** and **Price per unit** from **Product Master Table.**
11. Add a new column in Data view, and name as Revenue and Type this DAX query:
Revenue = 'Sales Data'[Unit Sold]*RELATED('Product Master'[Price per unit])
12. And change the **data type** of **Revenue** as **fixed decimal number** and format as currency.
13. Change the format of **Date** column as mm/dd/yyyy.
14. Go to **Report view** and click on **Insert Tab** and add a shape Rectangle.
15. Size accordingly and fill inside and line color as black.

16. Add a **text box** and name as Sales Data, size accordingly and turn off the background.
17. Add a **slicer** and **drag n drop** the **Date** Column from **Sales Data** Table into that **slicer** and adjust the required size and visuals.
18. Select **Card** from visualizations and insert field **Revenue** from **Sales Data** table and adjust the visuals for the card. Do the same for **Units sold card** (I just copy pasted and changed the field to Units Sold).
19. Add a **Donut Chart** and **create a hierarchy** of **Supervisor** followed by **Employee Name (EMP name)**, and adjust the visuals accordingly.



20. Add **Area Chart** for **Date** and **Revenue** columns from **Sales Data** column, enable **Data Labels** and adjust the visual accordingly. This enables me to see Date-wise revenue generation.
21. Add **bar graph** for **Product Name** and **Revenue** to see, which products generates how much revenue. Adjust the visuals accordingly.
22. Add a **Bookmark button** from **Insert Tab**, this will work as a button for the next dashboard.
23. **Copy paste this dashboard and create another dashboard.**
24. **Delete all the visuals except dashboard Title and Slicers.**
25. Add **table** and select all the required columns from the data set: **Date, EMPID, EMPName, Supervisor, ProductID, Unit Sold, and Revenue.**
26. **Enable bars** for **Revenue** Column in the format option.
27. Insert **back button** at the top left corner of the dashboard.
28. Create the **second dashboard as the Bookmark name “DDD”.**
29. **Uncheck the data option for the “DDD” bookmark, this allow the filters to not change when bookmark is selected from the first dashboard to the second dashboard.**
30. Align everything and hit save.
31. Publish to PowerBI service, Q&A data, to get specific results, pinned visualizations, share the dashboard or a particular visual.

Legend for the above instruction:

- **Bold is a query.**
- **Blue is a column name.**
- **Red is a feature.**
- **Green is a visualization.**
- **Yellow is the table name.**
- **Purple is a step.**