***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])**

1. And change the data type of Revenue as fixed decimal number and format as currency.
2. Change the format of Date column as mm/dd/yyyy.
3. Go to Report view and click on Insert Tab and add a shape Rectangle.
4. Size accordingly and fill inside and line color as black.
5. Add a text box and name as Sales Data, size accordingly and turn off the background.
6. Add a slicer and drag n drop the Date Column from Sales Data Table into that slicer and adjust the required size and visuals.
7. 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).
8. Add a Donut Chart and create a hierarchy of Supervisor followed by Employee Name (EMP name), and adjust the visuals accordingly.

Supervisor

EMP Name

1. 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.
2. Add bar graph for Product Name and Revenue to see, which products generates how much revenue. Adjust the visuals accordingly.
3. Add a Bookmark button from Insert Tab, this will work as a button for the next dashboard.
4. Copy paste this dashboard and create another dashboard.
5. Delete all the visuals except dashboard Title and Slicers.
6. Add table and select all the required columns from the data set: Date, EMPID, EMPName, Supervisor, ProductID, Unit Sold, and Revenue.
7. Enable bars for Revenue Column in the format option.
8. Insert back button at the top left corner of the dashboard.
9. Create the second dashboard as the Bookmark name “DDD”.
10. 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.
11. Align everything and hit save.
12. 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.**