

 **Financial Performance Project**

Tools used: Tableau, Microsoft Word

From raw data to business insights a full cycle analysis project

Comprehensive Analysis of Sales, Profit, COGS and Discounts

Dataset Overview:

- **Total Revenue:** 118.73 M
- **Fields Analysed:** Sales, Profit, Country, Product, Gross Sales, Segment, Discounts and Cogs
- **New Features Created:** Sales & Profit %, Total Units Sold, Total Revenue, Total Profit and Total Discounts

Key Highlights & Insights

- ◊ **1. Sales and Profit :**
 - **Total Revenue:** 118.73 M
 - **Total Profit:** 16.89 M
 - **Highest Sales & Profit in Country:** Germany
- ◊ **2. Sales Trends:**
 - **Total Units Sold:** 1.13 M
 - **Sales peaks:** 2013 Q1 and 2014 Q1
 - **Highest Sales in Segments:** Government
- ◊ **3. COGS vs Sales:**
 - **Highest Sales Price:** \$300
 - **Cogs to Sales:** Compared via Bar Chart
- ◊ **4. Gross Sales vs Discounts:**
 - Most sales among those products “**Paseo**”
 - **Highest Discounts** belong to **Mexico**
 - **Highest Gross Sales** belong to **US**

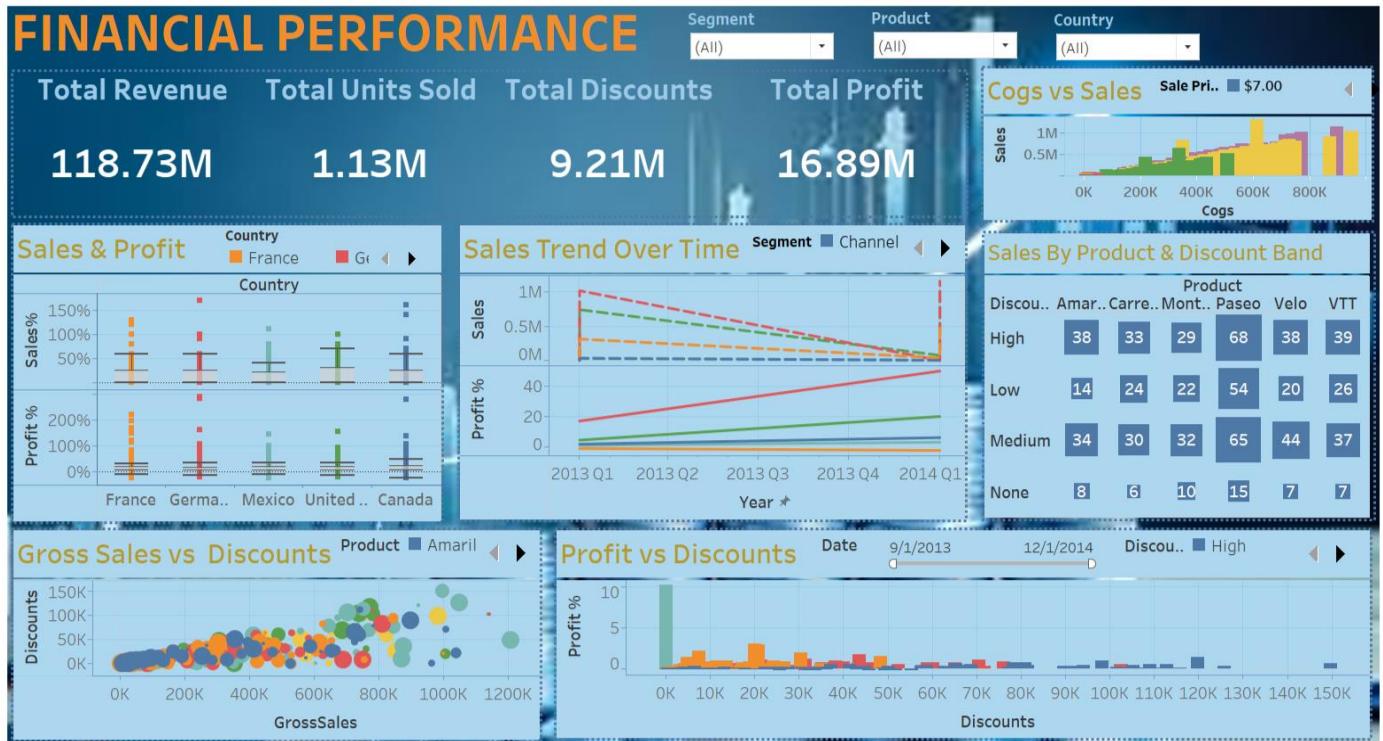
◊ **5. Visuals Used Across Tableau Page:**

Visuals	Usage Areas
Box & Whisker Plot	Sales & Profit
Bar Chart	Cogs vs Sales
Lines (Continuous)	Sales Trend Over Time
Scatter Plot (Circle)	Gross Sales vs Discounts
Heat Map	Sales by Product & Discount Band
Bar Chart	Profit vs Discounts
KPI Cards	Total Revenue, Total Units Sold, Total Discounts, Total Profit

Deliverables:

- Tableau.twb dashboard
- PDF export for offline presentation
- Project screenshots for LinkedIn / Resume
- GitHub-ready README

Tableau Dashboard – Page 1



This dashboard page analyzes financial metrics such as Sales, Profit, Gross Sales, Discounts, Product and Cogs to provide insights into the financial performance of a business.

Financial Performance Tableau Calculations

A.KPI's

1. Total Revenue:

tableau code:

Total Revenue = SUM([Sales])

2. Total Discounts:

tableau code:

Total Discounts = SUM([Discounts])

3. Total Profit:

tableau code:

Total Profit = SUM([Profit])

4. Total Units Sold:

tableau code:

Total Units Sold= SUM ([Units Sold])

B. Chart Requirements:

1. Cogs to Sales:

tableau code:

SUM([Cogs])/SUM([Sales])

2. Sales %:

tableau code:

ROUND((SUM([Sales])/ SUM ({FIXED: SUM([Sales])}))* 100,1)

3. Profit %:

tableau code:

ROUND((SUM([Profit])/ SUM ({FIXED: SUM([Profit])}))* 100,2)