**Overview**

Welcome to the **Xenith Financial Dashboard**! This Power BI dashboard is designed to provide a comprehensive view of key financial metrics, sales performance, profitability, and geographical trends across different business segments. It is a powerful tool for analysing and tracking the financial health of your organization.

**Features**

**1. Finance Data Overview**

* **Year, Quarter, Month, Date Filters**: Allows users to filter the data by specific time periods.
* **Product and Segment Filters**: Enables detailed analysis by product lines or business segments.
* **Overview of All Amounts**: A summary of key financial figures, including Gross Sales, Cost of Goods Sold (COGS), and Profit.

**2. Profitability Analysis**

* **Gross Profit & Margin**: Visualizes gross profit and profit margin over time, by product, and by geography.
* **Insights by Product**: Compares profitability across different products, allowing for performance benchmarking.
* **YoY Profit Change**: Tracks year-over-year changes in profitability to identify trends.

**3. Sales Performance Analysis**

* **Gross Sales by Product**: Highlights sales performance across different product categories.
* **Discount Sales**: Analysis sales distribution by discount bands (High, Medium, Low).
* **Geographical Performance**: Shows sales performance by city, helping to identify high-performing regions.

**4. Segment and Geography Analysis**

* **Segment Performance**: Breaks down gross sales, COGS, and profit by business segments like Cloud Solutions, Digital Transformation, etc.
* **Geographical Trends**: Visualizes gross profit and margins by city, offering insights into regional profitability.

**How to Use**

1. **Select Filters**: Use the filters at the top of each page to refine the data by time period, product, or segment.
2. **Navigate Through Pages**: The dashboard is divided into different sections (Overview, Profitability, Sales Performance, Segment & Geography). Click through the tabs to access each analysis.
3. **Analyse Data**: Dive deep into the visualizations to identify trends, compare performance, and gain insights.
4. **Export & Share**: You can export visualizations for reports or share the dashboard with colleagues for collaborative analysis.

**Technical Details**

* **Built With**: Power BI Desktop
* **Data Source**: Financial data spanning from 2012 to 2014, segmented by product, geography, and business unit.
* **Metrics Tracked**: Gross Sales, Cost of Goods Sold, Profit, Gross Profit Margin, Discount Sales, YoY Profit Change.

**Data Transformations:**

Changed the data types of all Amounts from text to Decimal numbers

Discount Amount column = Replace the value '$' with 0 and trimmed the text.

then added a custom Discount column as it is unable to change the data type.

Custom Discount Column (Power Query Editor Formula) = let

TextValue = [#" Discounts "],

ReplaceDollarDash = if TextValue = "$-" then "0" else TextValue,

RemoveDollarSign = Text.Replace(ReplaceDollarDash, "$", ""),

RemoveCommas = Text.Replace(RemoveDollarSign, ",", ""),

TrimText = Text.Trim(RemoveCommas),

ConvertToNumber = Number.FromText(TrimText, "en-US")

In ConvertToNumber

**Dax Formulas:**

**1).** Calendar =

ADDCOLUMNS (

CALENDAR (

DATE (2012, 12, 31),

DATE (2014, 12, 31)

),

"Year", YEAR([Date]),

"Month Number", MONTH([Date]),

"Month Name", FORMAT([Date], "MMMM"),

"Quarter", "Q" & QUARTER([Date]),

"Day", DAY([Date]),

"Day of Week", WEEKDAY([Date], 2),

"Day of Week Name", FORMAT([Date], "dddd"))

**2).** Product New=

SWITCH (

TRUE (),

TRIM ('Financials'[ Product]) = "Carretera", "Document Automation",

TRIM ('Financials'[ Product]) = "Paseo", "Print Management Software",

TRIM ('Financials'[ Product]) = "Velo", "Cloud Printing Solutions",

TRIM ('Financials'[ Product]) = "VTT", "Secure Print Solutions",

TRIM ('Financials'[ Product]) = "Amarilla", "Business Process Automation",

TRIM ('Financials'[ Product]) = "Montana", "IT Services",

BLANK ())

**3).** Segment New=

SWITCH (

TRUE (),

'Financials'[Segment] = "Channel Partners", "Digital Transformation",

'Financials'[Segment] = "Enterprise", "Managed Print Services",

'Financials'[Segment] = "Government", "Cloud Solutions",

'Financials'[Segment] = "Midmarket", "Document Security",

'Financials'[Segment] = "Small Business", "Workflow Automation",

BLANK ())

4). Cities = SWITCH (

TRUE (),

'Financials'[Country] = "Canada", "Birmingham",

'Financials'[Country] = "France", "Bristol",

'Financials'[Country] = "Germany", "Glasgow",

'Financials'[Country] = "Mexico", "London HQ",

'Financials'[Country] = "United States of America", "Manchester",

BLANK ())

**5).** Formatted Date = FORMAT([Date], "MM/DD/YYYY")

**6).** Local Gross sales = sum (Financials [ Gross Sales])

**7).** Local Cost of goods sold = sum (Financials [ COGS])

**8).** Local gross profit = [Local Gross sales] - [Local Cost of goods sold]

**9).** Local Gross Profit Margin = DIVIDE ([local Gross Profit], [Local Gross sales], 0)

**10).** Gross Sales Without Promotion =

SUM ([ Local Gross Sales]) - SUM([Custom])

**11).** Local Previous Year profit = CALCULATE (

[Local gross profit],

PARALLELPERIOD('Calendar'[Date], -1, YEAR))

**12).** YoY Profit Change = [Local gross profit] - [Local Previous Year profit]

**13).** YoY Profit Growth % = DIVIDE ([YoY Profit Change], [Local Previous Year profit], 0)

**Data Model:**

Created a Callender dim table and joined it with main fact tables on date column

Paste the data model image here:

A screenshot of a computer

Description automatically generated