Sales & Promo Summary

~Shop Smart, Save Big: Your Ultimate Retail Destination!

A sales and promotion summary dashboard provides a comprehensive overview of key metrics and insights related to sales performance and promotional activities within a business. Here's an overview of what such a dashboard might include:

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Overview

Data Model

The data pipeline architecture consists of the following key components:

3.2.1 Data Sources

•**Data warehousing** is considered from the SQL server – AdventureDW2022

•**Subject Area Considered –** Sales, Product, Customer, Organization, Calendar, Promotion

•**External Table** – Cyclic Dimension – Measure and Dimension

Cyclic Dim:
Dimension
Measure

Calendar:
Year, Month,
Week, Date

Promotion
Promo Key
Description
Voucher Type
Voucher Code

Fact:
Factinternetsales
Sales, Order,
Return, Cancel,
Date, Ship Date,
Due

Country
Country Code
Region
Location

Organization:
Organization,
Parent

Product
Product Code
Product
Description
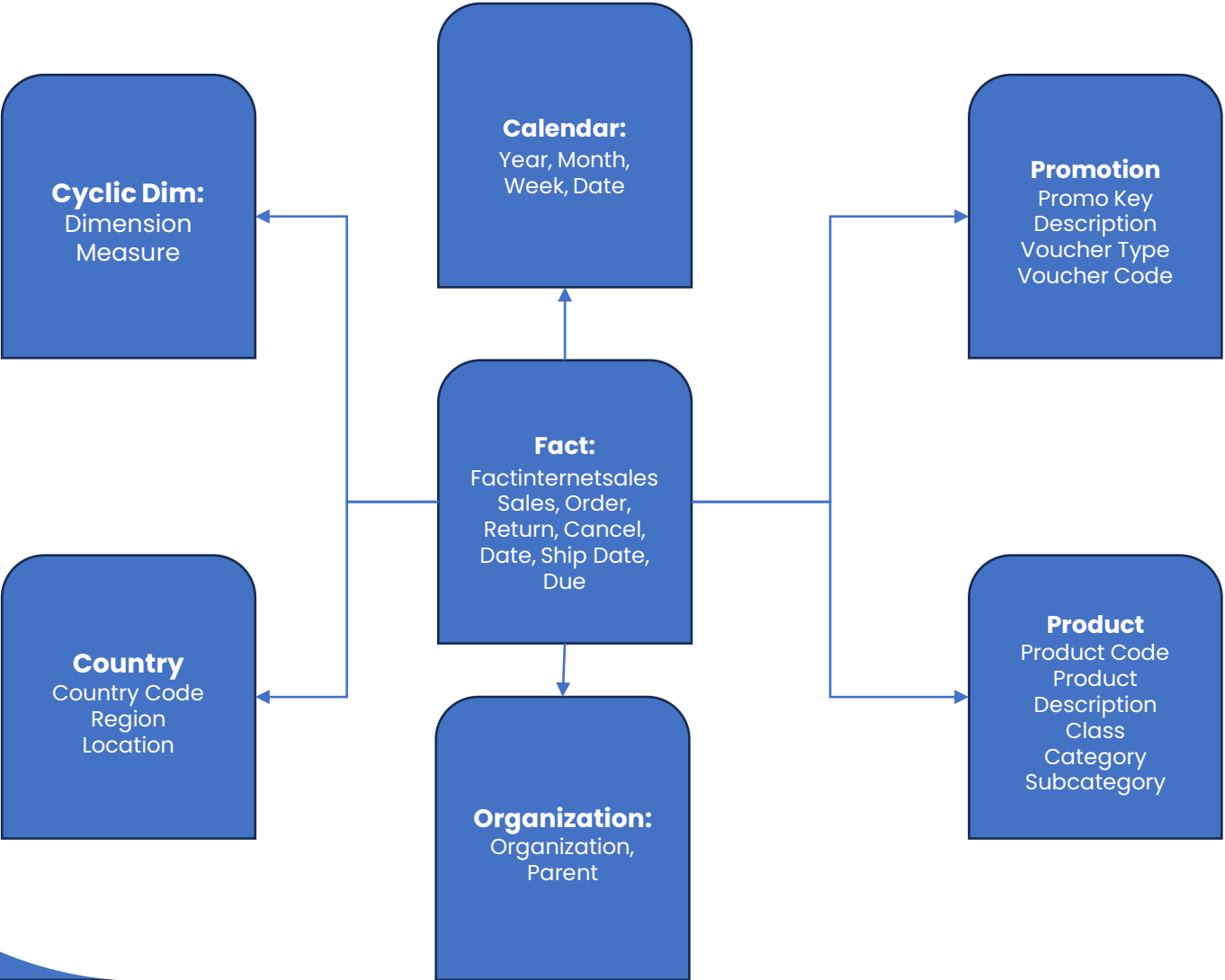Class
Category
Subcategory

Table Relationships:

•**FactInternetSales (a)**:
   •One-to-many relationship with **dimdate**, **DimProduct**, and **DimPromotion** tables based on foreign key associations.

•**dimdate (b)**:
   •Provides date-related attributes for sales transactions in FactInternetSales.

•**DimProduct (c)**:
   •Provides product-related attributes for sales transactions in FactInternetSales.

•**DimPromotion (d)**:
   •Provides promotion-related attributes for sales transactions in FactInternetSales.

•   **Organization(d):**
   •   The organization table is linked with the Fact table using the Currency Table

•   **Product Hier(d):**
   •   Class & Subclass and Product Hierarchy

KPI Glossary

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Summary:

Summary View contains Sales Order, Order Qty, Average Order Value, Average Member Spent, UPT, Total Cost, Gross Margin, Margin Value, Ship Value, etc.

Summary Value – Scorecard

Last Year Value – for each above KPI

Growth vs LY %.

Measure: Sales, Promotion, Margin, ATV, Invoices, UPT, Margin%, ASP, SPD, Operational Days Qty.

Dimension: Region, Country, Month, Year, Date, Category, Subcategory, Voucher Code

Promo Summary:

Summary View contains Sales Order, Order Qty, Average Order Value, Average Member Spent, UPT, Total Cost, Gross Margin, Margin Value, Ship Value, etc.

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Glossary	Definition	Formula
Sales Value	Net Sales Value	Sum(Sales Value)
Order Qty	Order Units	Sum(Order Units)
Sales Price	List price	Count(Customer)
Sales Invoice	Average Member Spent	Sum(Sales Value)/Count(Customers)
ATV	Average Order Value	Sum(Sales Value)/Sum(Order Units)
Negative Margin	Cost > Sales	If(Sales < Cost,1,0)
Margin	Sales - Cost	Margin of the product
UPT	Units per Transaction	Units / Invoices(Transaction)
Operational Days	Days of Operation	Count(Distinct Days) where sales >0
SPD	Sales per Day	Net Sales / Operational Days

RLS Security:

RLS is implemented based on the Organization and geography level and the same is maintained in the flat file.

User	Organization	Region
Shiva	Abc	AU
Alex	Efg	EG

Tools Used:

- Microsoft SQL Server Management Studio (SSMS)
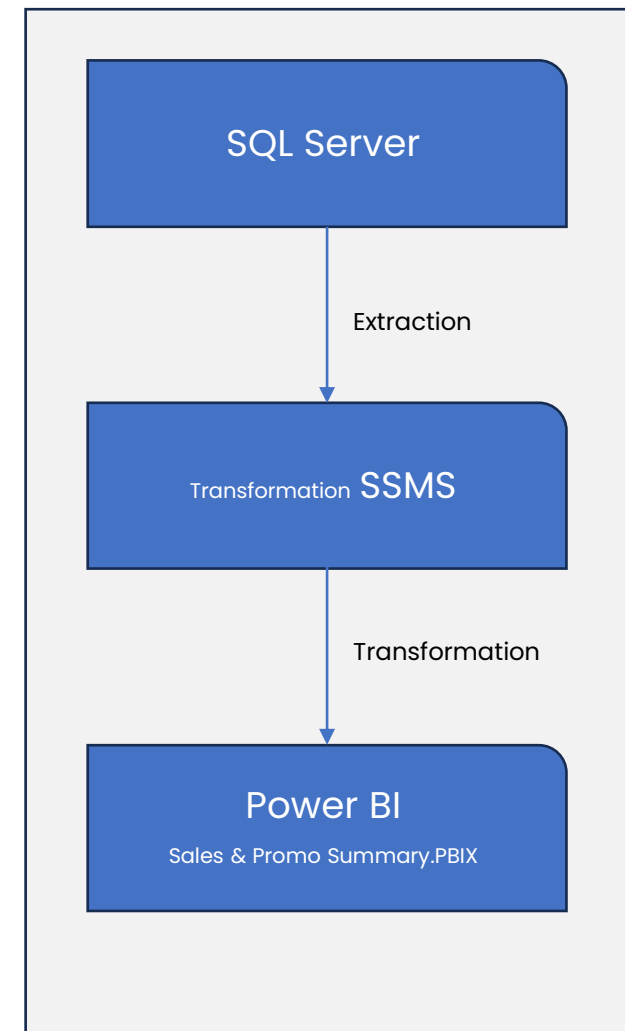
- Power BI Desktop

Data Pipeline Steps:

Data Extraction:

  - Source: Microsoft SQL Server database.

o Factinternetsales, Dimpromotion, Dimcustomer >> additional flags like a family flag, negative margin flag

o Customer New Repeat Logic based on the Last Purchase date.

o Customer Recency, Frequency, and Monetary Logic.

o   Date Logic using the Dimdate

  - Tools Used: SSMS for query development.

  - SQL Queries:

Visualization and Analysis:

  - Tools Used: Power BI Desktop.

  - Visualization Logic:

SQL Server

Extraction

Transformation **SSMS**

Transformation

Power BI
Sales & Promo Summary.PBIX

Extraction Logic

Power BI desktop

Click here to get the extraction and pbix file

Extraction sales promo summary.sql

Sales & Promo summary.pbix