Matrix visual to show **Total Transactions**, **Total Profit**, **Profit Margin**, and **Return Rate** by **Product_Brand** (*on rows*)

- Add conditional formatting to show **data bars** on the Total Transactions column, and **color scales** on Profit Margin (*White to Green*) and Return Rate (*White to Red*)
- Add a visual level **Top N** filter to only show the top 30 product brands, then sort descending by Total Transactions

KPI Card to show **Total Transactions**, with **Start of Month** as the trend axis and **Last Month Transactions** as the target goal

KPI Card to show **Total Profit**, with **Start of Month** as the trend axis and **Last Month Profit** as the target goal

KPI Card to show **Total Returns**, with **Start of Month** as the trend axis and **Last Month Returns** as the target goal

New Card Visuals to show **Total Transactions, Total Profit, Total Revenue and Return Rate**

New Card Visual with Reference Labels to build a card with **Total Revenue** filtered with **Latest start of month** and the metrics as follows: **Last Month Revenue, Revenue Target and Revenue Target Gap**

Map visual to show **Total Transactions** by store city

- Add a slicer for store country

Next to the map, I added a **Treemap** visual to break down **Total Transactions** by store country. Then I Pulled in **store_state** and **store_city** beneath **store_country** in the "Group" field to enable drill-up and drill-down functionality

Beneath the map, I added a **Column Chart** to show **Total Revenue** by week.

- Add a **report level filter** to only show data for 1998

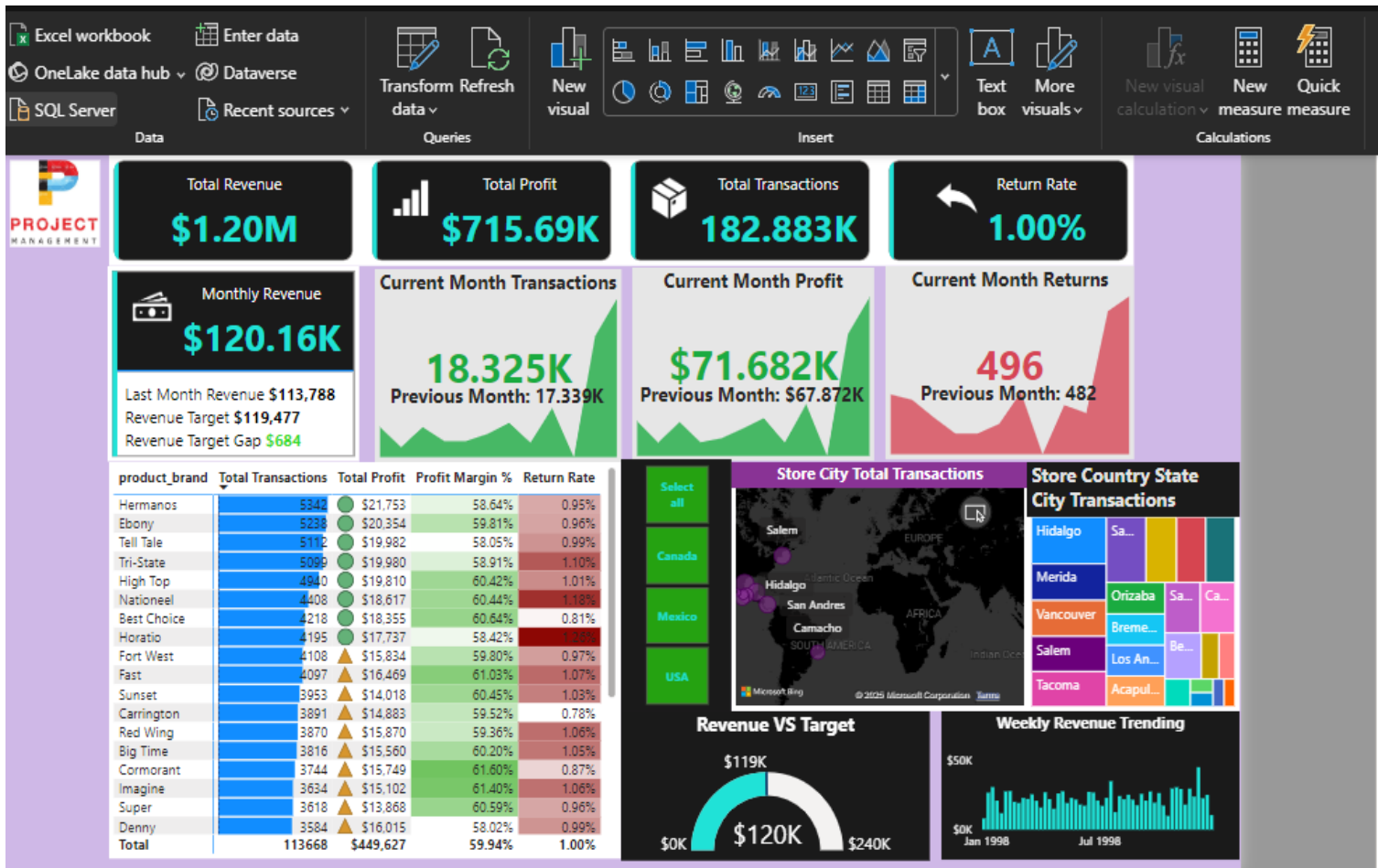Add a **Gauge Chart** to show **Total Revenue** against **Revenue Target**

- Add a visual level **Top N** filter to show the latest **Start of Month**

Select the Matrix and activate the **Edit interactions** option to prevent the Treemap from filtering

Add a new bookmark named "*Portland 1000 Sales*"

Add a new bookmark named "*Vancouver Total Transactions*"

Add a new bookmark named "*LA Total Transactions*"

Excel workbook | Enter data
OneLake data hub | Dataverse
SQL Server | Recent sources

Data

Transform data | Refresh

Queries

New visual

Insert

Text box | More visuals

New visual calculation | New measure | Quick measure

Calculations

PROJECT MANAGEMENT

Total Revenue	Total Profit	Total Transactions	Return Rate
$1.20M	$715.69K	182.883K	1.00%

Monthly Revenue
$120.16K
Last Month Revenue $113,788
Revenue Target $119,477
Revenue Target Gap $684

Current Month Transactions
18.325K
Previous Month: 17.339K

Current Month Profit
$71.682K
Previous Month: $67.872K

Current Month Returns
496
Previous Month: 482

product_brand	Total Transactions	Total Profit	Profit Margin %	Return Rate
Hermanos	5342	$21,753	58.64%	0.95%
Ebony	5238	$20,354	59.81%	0.96%
Tell Tale	5112	$19,982	58.05%	0.99%
Tri-State	5099	$19,980	58.91%	1.10%
High Top	4940	$19,810	60.42%	1.01%
Nationeel	4408	$18,617	60.44%	1.18%
Best Choice	4218	$18,355	60.64%	0.81%
Horatio	4195	$17,737	58.42%	1.26%
Fort West	4108	$15,834	59.80%	0.97%
Fast	4097	$16,469	61.03%	1.07%
Sunset	3953	$14,018	60.45%	1.03%
Carrington	3891	$14,883	59.52%	0.78%
Red Wing	3870	$15,870	59.36%	1.06%
Big Time	3816	$15,560	60.20%	1.05%
Cormorant	3744	$15,749	61.60%	0.87%
Imagine	3634	$15,102	61.40%	1.06%
Super	3618	$13,868	60.59%	0.96%
Denny	3584	$16,015	58.02%	0.99%
Total	**113668**	**$449,627**	**59.94%**	**1.00%**

Select all
Canada
Mexico
USA

Store City Total Transactions
Salem
Hidalgo
San Andres
Camacho
EUROPE
AFRICA
SOUTH AMERICA
Atlantic Ocean
Indian Oce
Microsoft Bing © 2025 Microsoft Corporation Terms

Store Country State City Transactions
Hidalgo | Sa...
Merida | Orizaba | Sa... | Ca...
Vancouver | Breme...
Salem | Los An... | Be...
Tacoma | Acapul...

Revenue VS Target
$119K
$0K $120K $240K

Weekly Revenue Trending
$50K
$0K
Jan 1998 Jul 1998

Portland hits 1,000 sales in December
Clear Portland Filters

The total number of Transactions in Vancouver is 12,770
Clear Vancouver Filters

LA hits 8000 transactions
Clear Vancouver Filters