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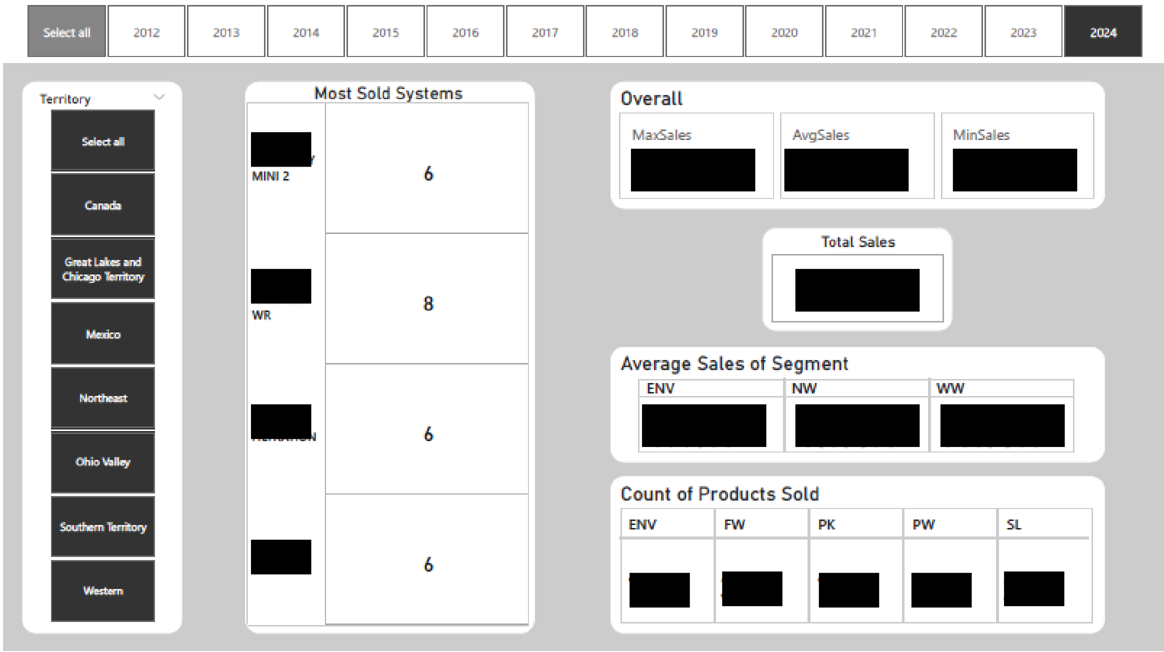
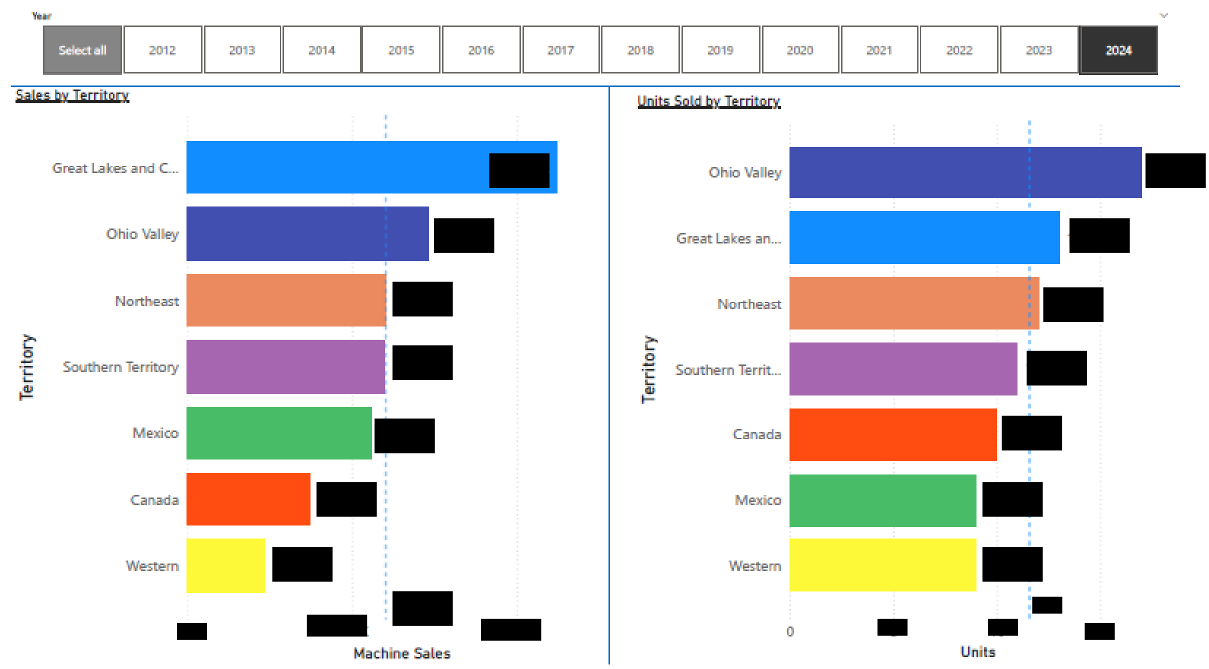
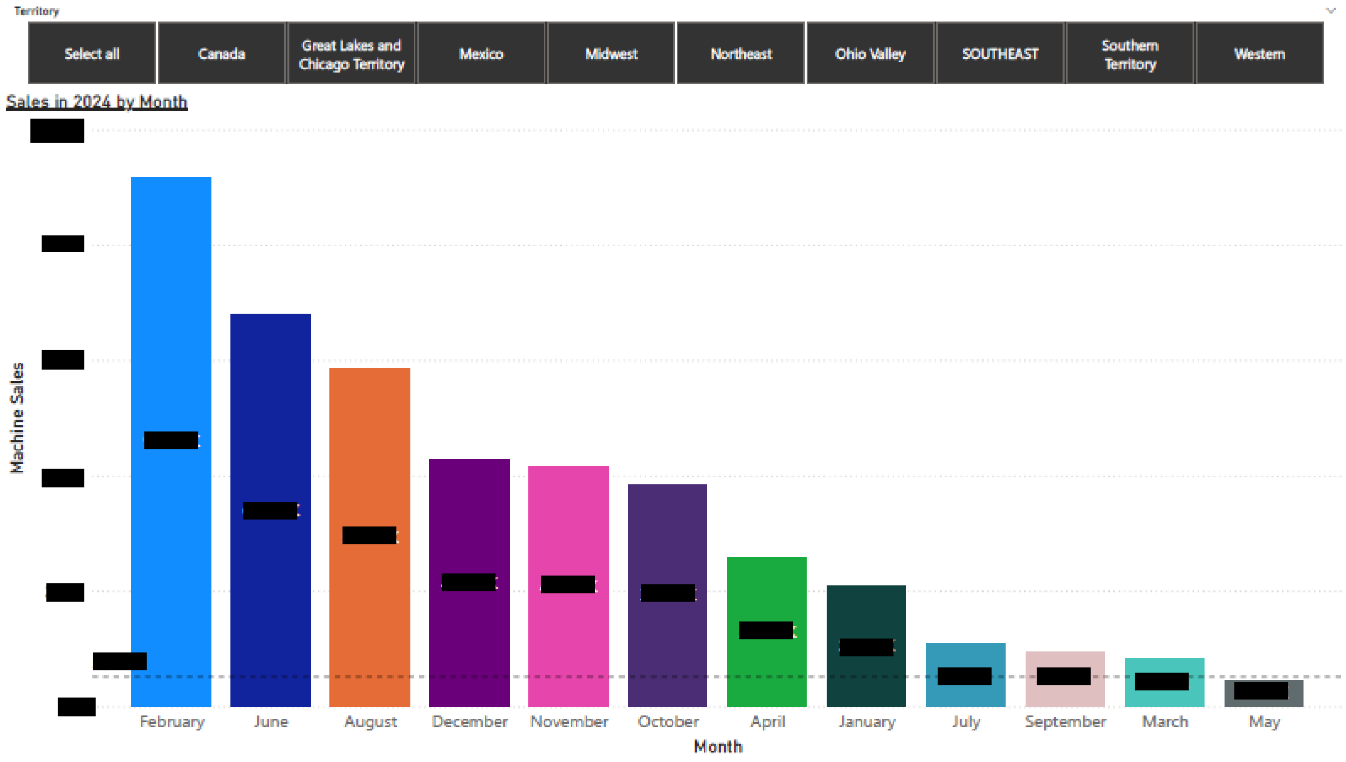
Power BI Dashboards – Sources (MS SQL Server, DirectQuery, SharePoint, Import, Live Connection)

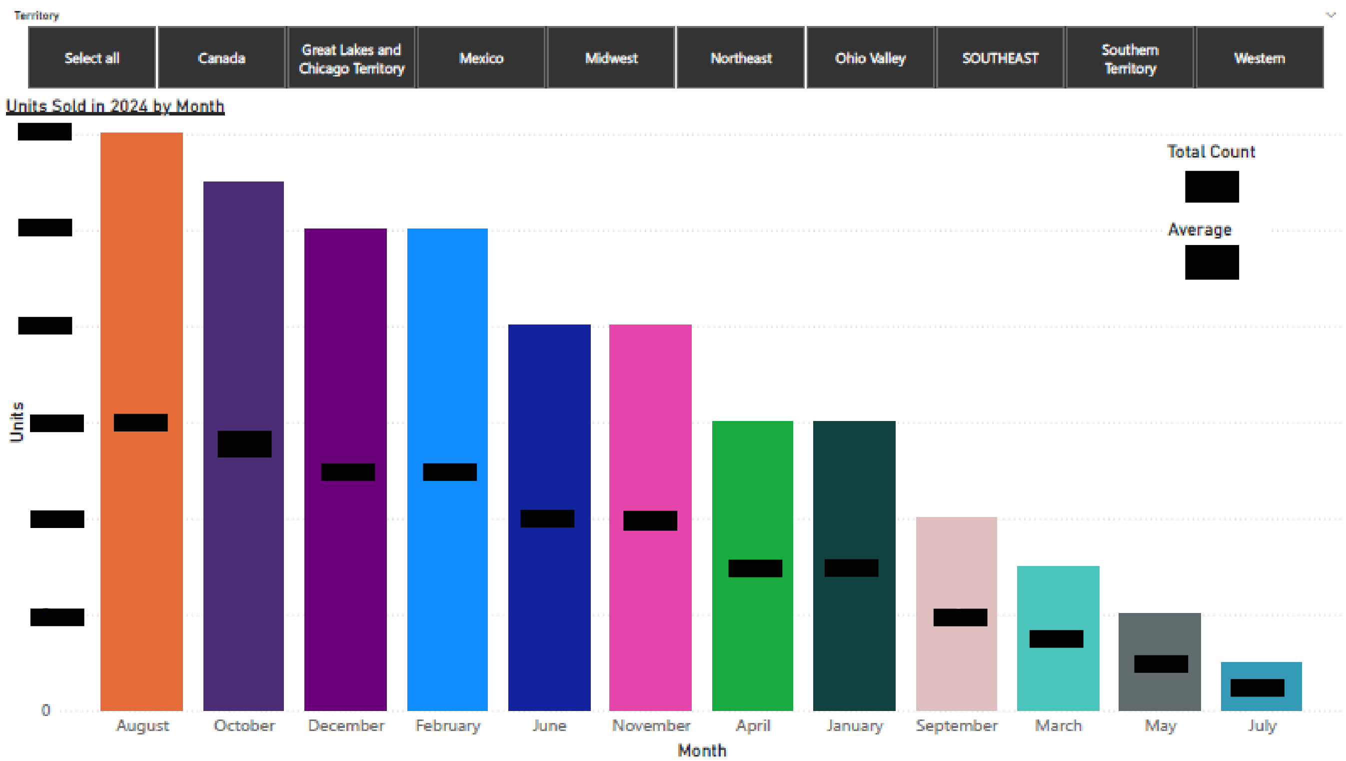


This dashboard provides a high-level summary of the company's sales performance for 2024. It showcases key metrics such as total and average sales, sales distribution by business segment, and top-performing products. This was developed to give Sales team a quick yet comprehensive understanding of business performance. It also enabled the leadership to identify the best-selling systems, understand which segments contributed most to sales, and ultimately aiding in better sales targeting and strategic planning.



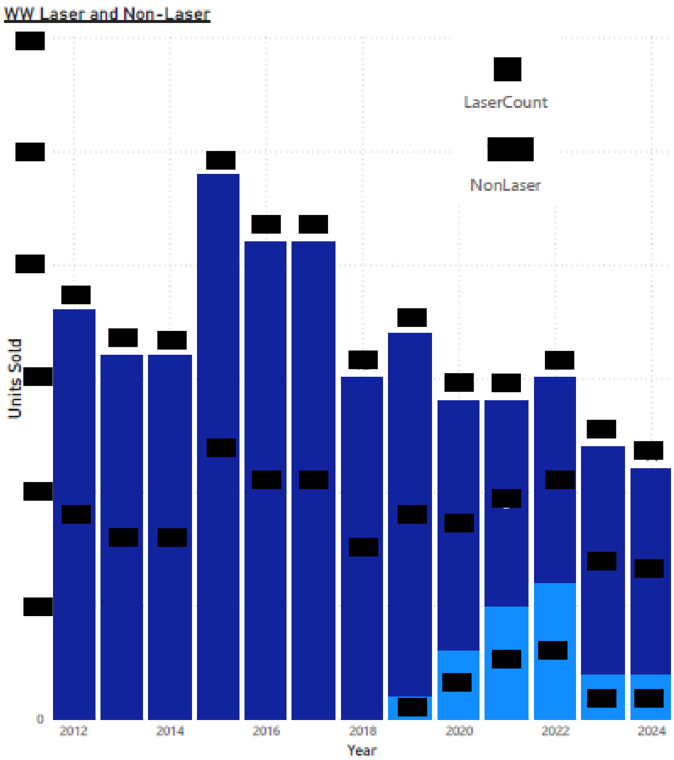
This report presents a detailed comparison of total sales and unit sales across all territories. The rationale behind creating this page was to support regional sales analysis and help the company focus its efforts where potential was either underutilized or strong. This dashboard allowed the sales team to reallocate resources efficiently, and focus marketing efforts on high-performing or underserved areas.

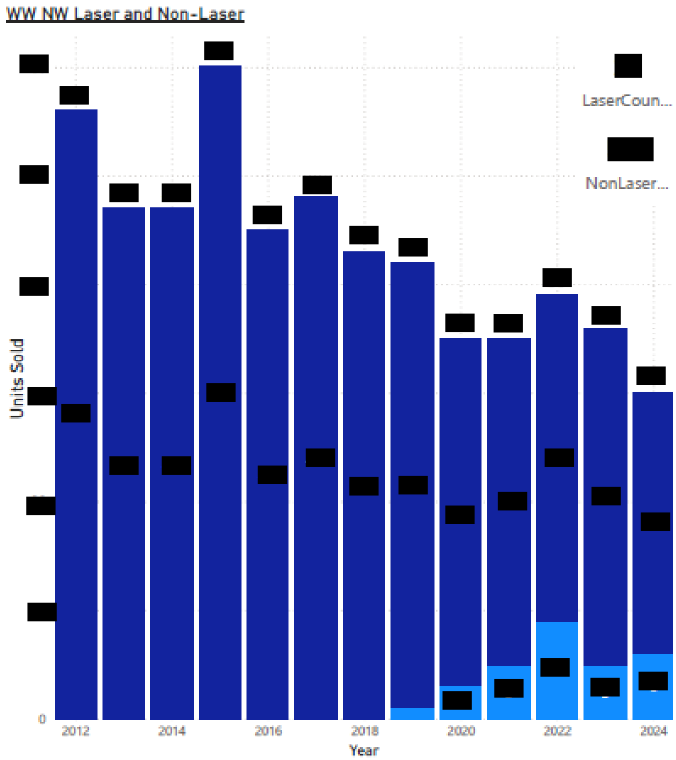




These visuals analyzes monthly trends in sales and units sold specifically for the year 2024. This was created to identify seasonal peaks and dips throughout the year, which are critical for inventory management and promotional timing. The insights gained helped departments better plan their stock levels and sales strategies during high-performing months.

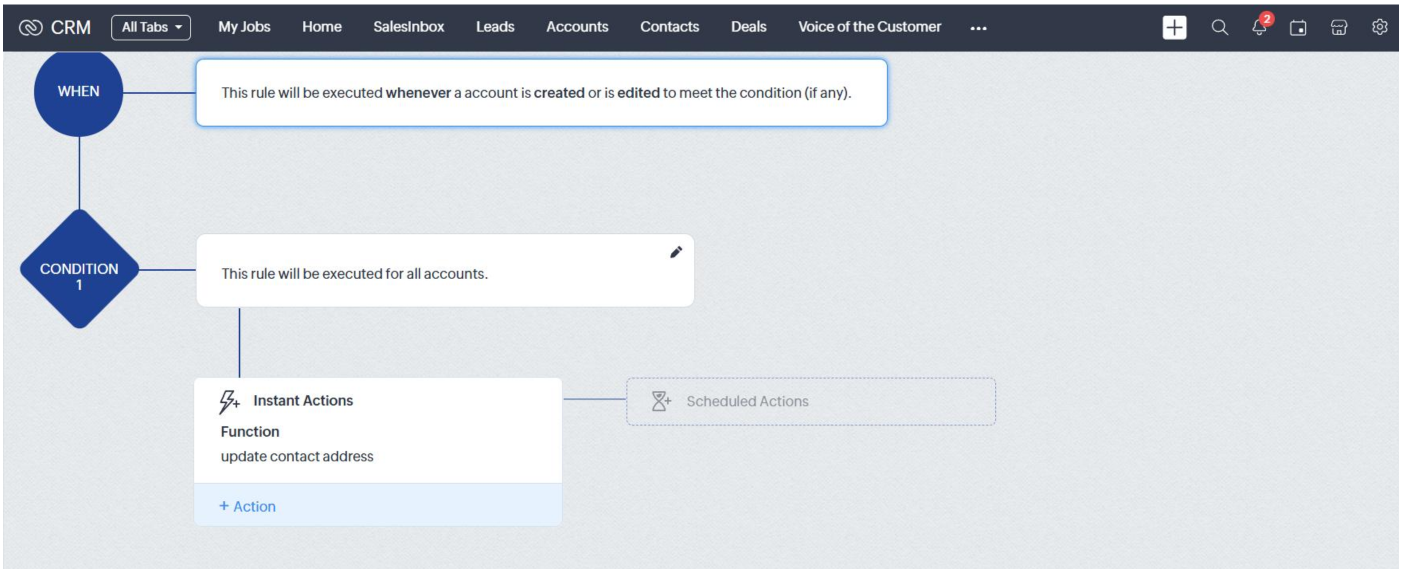
This visualization breaks down sales figures and units sold by individual products over last 5 years. I created this to evaluate the performance and lifecycle of each product offering. The dashboard made it easier to determine which products were generating the most revenue and which were becoming obsolete. These insights helped product managers make data-backed decisions regarding product development, phasing out underperforming items, and prioritizing the most profitable product lines.





This compares laser and non-laser system sales within WW and NW segments over time. The objective was to measure the adoption of advanced laser systems and see how customer preferences shifted. The impact of this dashboard was significant as it demonstrated growing adoption of laser technologies and helped guide future R&D and product positioning strategies to meet evolving customer demands.

Zoho Automated Workflows

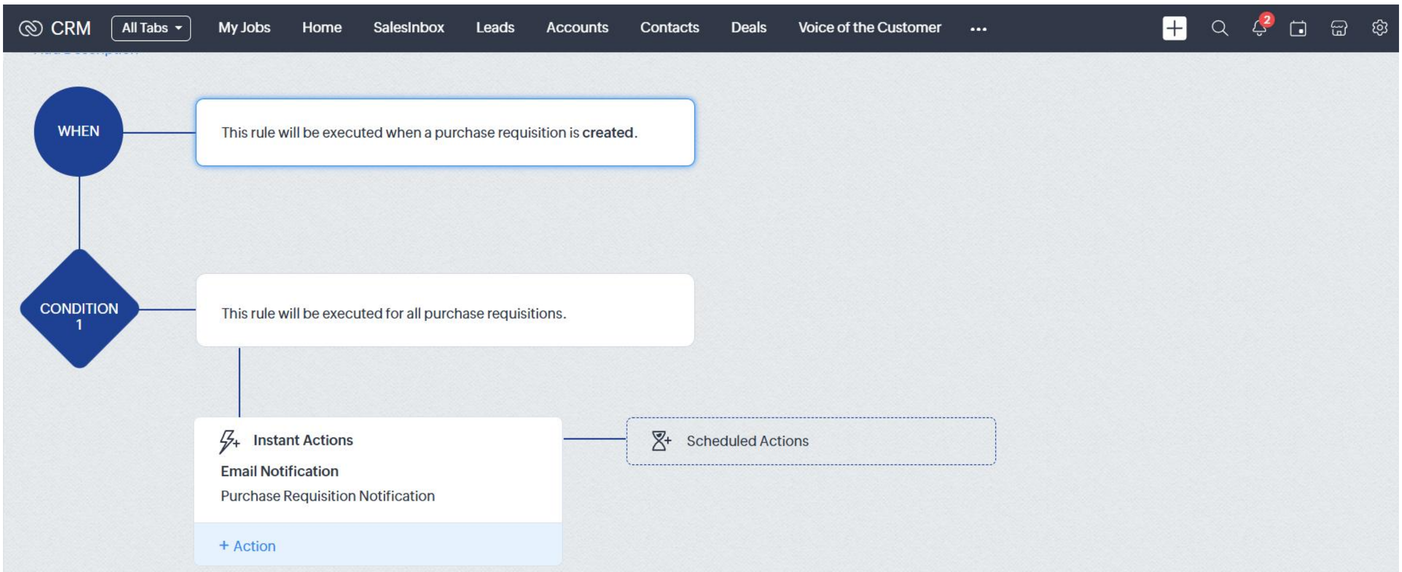


This workflow is triggered whenever an Account is created or updated in the CRM. Once triggered, it calls a custom function to update contact address.

Purpose:
To automatically update the contact's address details based on the account's address, ensuring consistency between account and contact records.

Impact:

- Reduces manual data entry errors.
- Ensures data integrity between related modules.
- Saves time for CRM users who would otherwise manually sync addresses.

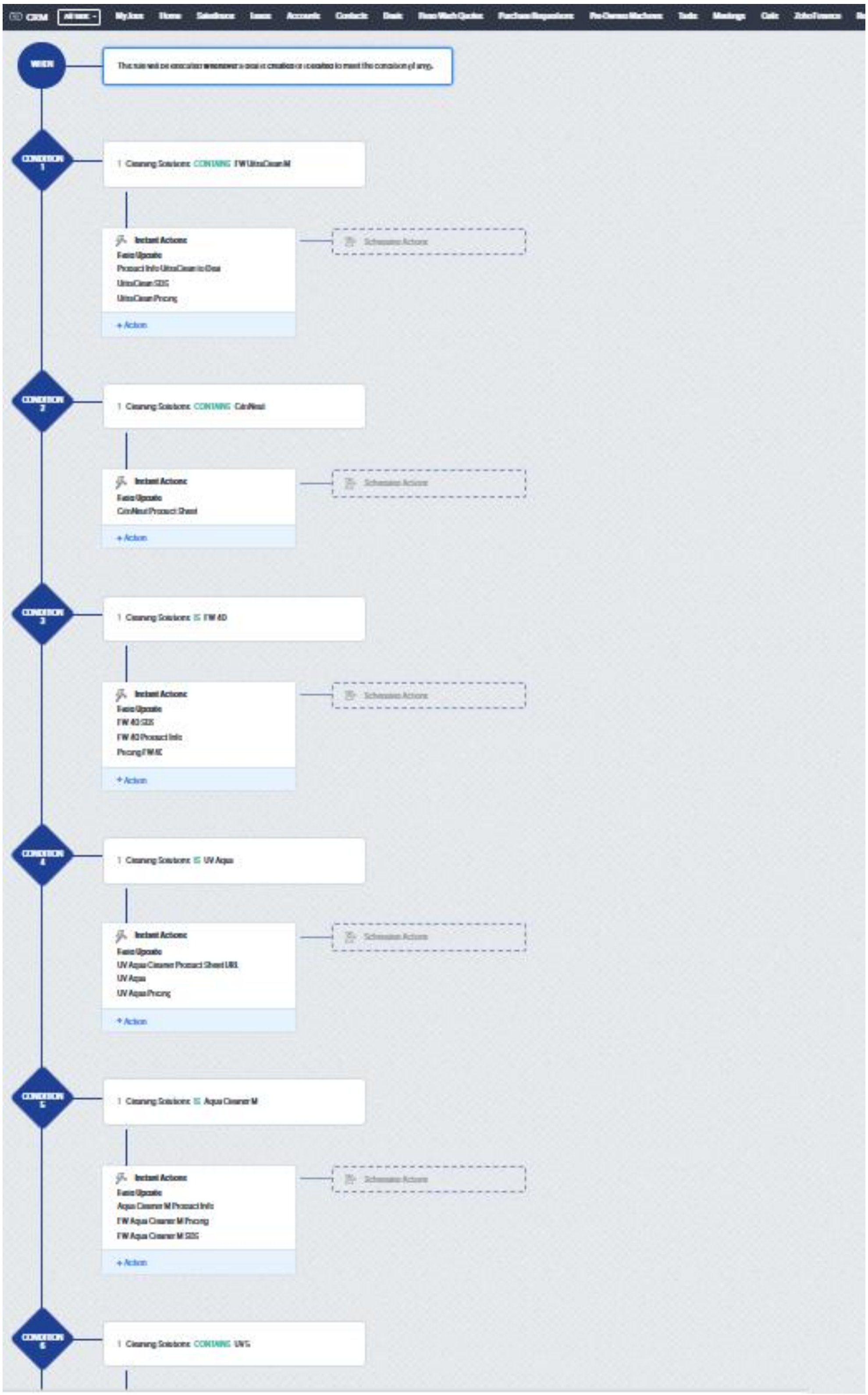


This rule is triggered when a purchase requisition is created. The system then sends an Email Notification to the concerned people.

Purpose:
To instantly notify relevant stakeholders when a new requisition is submitted.

Impact:

- Enables faster approval workflows.
- Keeps procurement teams updated in real-time.
- Minimizes delays in processing requisitions.

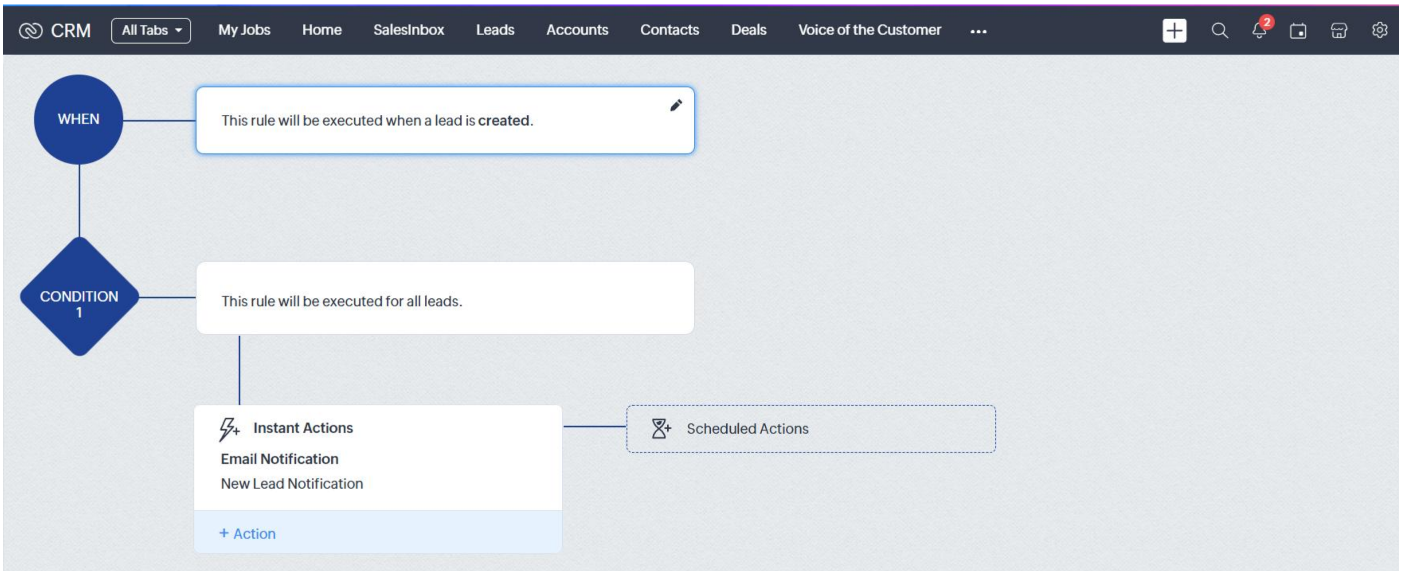


This flow runs when a record is created/edited, and based on different product (cleaning solution) names. Each Condition block checks for a specific product name and then executes email notifications and sends product-related information (spec sheets, pricing, SDS, etc.)

Purpose:
To provide instant delivery of relevant product documentation to internal teams or clients based on the selected product.

Impact:

- Eliminates the need to manually search and send files.
- Ensures customers and sales reps get accurate product info instantly.
- Saves a significant amount of time for customer-facing teams.
- Standardizes the information sent across product lines.



Triggered when a new lead is created, this flow sends out an email notification to the team with the details of the lead.

Purpose:
To immediately alert the sales team or lead owner about new lead creation so they can take prompt follow-up action.

Impact:

- Improves lead response time, which is critical for conversions.
- Keeps the sales team updated without needing to manually check for new entries.
- Automates internal communication for better workflow coordination.