



Power BI Analytics Dashboard

Interactive Business Intelligence Solution for Inventory Management,
Shipment Tracking, and Service Analytics

Prepared by VLTRN | December 2025

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Project Overview



What We're Building

A comprehensive Power BI dashboard that transforms your operational data into actionable insights.

- Real-time inventory tracking
- Shipment status monitoring
- Warranty & service analytics
- Revenue performance metrics
- Customer insights

7

DASHBOARD
PAGES

50+

DAX
MEASURES

15

SLICER
FILTERS

Key Benefit

Select any region, client, or product - all metrics instantly update to show relevant data including costs, volumes, and KPIs.

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Sample Allocation Data

Client Warehouse	Contact	Order #	SKU	Quantity	State	Prior
Client Warehouse 1	John Smith	0001-Dot-001	Wire Rack	3	NY	Stan
Client Warehouse 1	John Smith	0001-Dot-001	Shipper	5	NY	Stan
Client Warehouse 1	John Smith	0001-Dot-001	Fridge Model 1	2	NY	Stan
Client Warehouse 2	Chad Smith	0001-Dot-002	Shipper	10	CA	Stan
Client Warehouse 4	James Smith	0001-Dot-004	Fridge Model 1	10	TX	Stan
Client Warehouse 5	Sarah Smith	0001-Dot-005	Fridge Model 1	50	TX	Stan

Data Integration

Your allocation lists, inventory records, shipment data, and service records will all be connected in a unified data model with automatic relationship detection

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Dashboard Structure



Dashboard Home

- Warehouse summary KPIs
- Active shipments overview
- Warranty & service status
- Operational health score



Warehouse / Storage

- Pending Arrival units
- Available Inventory
- Exited Warehouse
- Inventory by SKU



Active Shipments

- In Transit tracking
- Pending shipments
- Delivery status funnel
- Carrier performance



Warranty & Service

- Active Warranty (by SN)
- Service Requested



Revenue Analytics

- Actual vs Budget
- Revenue decomposition



Customer Insights

- Customer segmentation
- VIP performance

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Interactive Filtering

Every page includes slicer controls that dynamically filter all visuals. Select a region, client, or product - everything updates instantly.

REGION Southeast ▼

CLIENT All Clients ▼

CATEGORY Fridge Model 1 ▼

YEAR 2024

QUARTER Q1 Q2 Q3 Q4

Dashboard

Warehouse

Shipments

Warranty

24

Pending Arrival

156

Available

89

Exited

12

In Transit

← Values update based on slicer selections →

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Key Features

Real-Time Data Refresh

Connect directly to your data sources for automatic updates

Multi-Select Filtering

Select multiple regions, clients, or products simultaneously

Serial Number Tracking

Warranty status tracked at the individual unit level

Time Intelligence

YoY, MoM, YTD comparisons built into every metric

Custom Branding

DotDesignPop theme with your brand colors throughout

Export Capabilities

Export to PDF, PowerPoint, or Excel with one click

Drill-Through Pages

Click any data point to see detailed breakdowns

Mobile Responsive

Access dashboards on tablet and mobile devices

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Distribution Network

Sales Director	RSM	DSD Main House
Josh Arrington	Mallory Wendt	Lakeshore Beverage
Josh Arrington	Mallory Wendt	Superior Beverage
Josh Arrington	Mallory Wendt	LaMonica Beverages
Josh Arrington	Mallory Wendt	ZT Distribution
Nick McClafferty	Brian Hicks	Donaghy Sacramento
Nick McClafferty	Brian Hicks	Donaghy Fresno



Product Allocation Tracking

Product	Available	Remaining	Cost/Unit
Pallet Skirt	1,200	178	\$26.88
20 Case Shipper	5,000	688	\$25.00
Taco Header	2,000	870	\$49.15
Foldable Standee	1,750	458	\$22.80

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Next Steps

1

Data Review

Validate data sources
& requirements

2

Build

Develop dashboard
& measures

3

Review

Client review
& feedback

Deliverables Included

- ✓ Power BI Desktop file (.pbix)
- ✓ Custom theme file (.json)
- ✓ DAX measures documentation
- ✓ Import instructions guide
- ✓ Slicer reference guide

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