**REPORT BUILDING PROCESS**

**STEP 1: LOAD DATA & TRANSFORM DATA**

* Download the data folder.
* Load the tables into PBI.
* Check data type.
* Transform VanArsdel Budget table:
* Remove top 3 columns
* Merge Category and Segment columns
* Transpose data
* Use the first row as headers
* Unpivot columns
* Unmerge Category and Segment
* Rename the columns and check data types
* Find and correct misspelling errors (Campaign table: Deskop => Desktop).
* Close & Apply.

**STEP 2: CREATE DATE DIMENSION TABLE**

* Add a new table, name the table “DateDim”.
* Enter the DAX expression (using CALENDAR function) to create a calendar that starts on January 1st 2011 and ends on December 31st 2016.
* Add new columns to extract year, quarter, month, day value from the date column (using YEAR, QUARTER, MONTH, DAY functions).

**STEP 3: CREATE A DATE COLUMN IN THE BUDGET TABLE TO LINK WITH THE DATEDIM TABLE**

* Create the “FirstDate of Month” column by concatenating the year, month and “1” value and use DATEVALUE function to change the text into date type

**STEP 4: CREATE THE DATA MODEL BY EDITING RELATIONSHIPS BETWEEN TABLES IN THE MODEL VIEW**

**STEP 5: CREATE NECESSARY MEASURES FOR SALES ANALYSIS**

* Add “Unit Cost” and “Unit Price” to the Sales table.
* Click edit query to open Power Query Editor
* On tab Home, choose Merge Queries
* Select “Sales” and “Product” tables, merge by “ProductID” column
* Choose to add “Unit Cost” and “Unit Price” to the Sales table
* Click new measures and enter DAX expressions to calculate necessary figures.
* Calculate Total Revenue = Units \* Unit Price using SUMX function.
* Calculate Total Cost = Units \* Unit Cost using SUMX function.
* Calculate Total Profits = Total Revenue - Total Cost.
* Calculate Profit Margins = Total Profits/Total Revenue using DIVIDE function, display the value in percentage.
* Calculate Quarter-to-Date Revenue using CALCULATE and DATESQTD function.
* Calculate Previous-Quarter Revenue using CALCULATE and DATEADD function.
* Calculate Quarter-on-Quarter Revenue = (QTD Rev - PQ Rev)/ (PQ Rev) using CALCULATE and DATESQTD function, display the value in percentage.
* Calculate % forecast revenue achieved:
* Filter Total Revenue in the first half of 2016 from the Sales table
* Filter Value from the Budget table by Type (= Forecast) and Month (= the first 6 month)
* % forecast revenue achieved = (Filtered Total Revenue - Filtered Value)/Filtered Value
* Display the measure in percentage
* Calculate the remaining target revenue for the later half of 2016:
* Filter Total Revenue in the first half of 2016 from the Sales table
* Filter Value from the Budget table by Type (= Forecast)
* Target Rev\_Q3&Q4/2016 = Filtered Value - Filtered Total Revenue

**STEP 6: CREATE DATA VISUALS USING THE AVAILABLE COLUMNS AND MEASURES**

**STEP 7: ORGANIZE AND FORMAT THE DASHBOARD**

**STEP 8: CREATE A SALES REPORT IN POWERPOINT FORMAT TO SUMMARIZE THE INSIGHTS**

**PURPOSE OF THE SALES DASHBOARD**

This dashboard is created with the purpose of analyzing VanArsdel’s sales data, assessing the projected budgets and revenue target achievement. This dashboard can also be used for keeping track of sales status, readjusting budget allocation and revenue goals to improve VanArsdel’s sales performance.