

Cover Page

Task 4 — Dashboard Design

Sales & Financial Dataset Analysis

Executive Summary

This report presents a complete dashboard design built on a monthly Sales & Financial dataset.

The goal of the dashboard is to help business stakeholders quickly understand:

- Revenue performance
- Profitability
- Cost structure
- Customer and order behavior
- Monthly trends

README

Project Title: Task 4 — Sales & Financial Dashboard

This project demonstrates a full dashboard design using a monthly financial dataset. All visual components, KPIs, insights, and design principles are included for easy implementation in Power BI or Tableau.

Included Sections

- Dataset description
- KPI structure
- Dashboard layout
- Visual mockups
- Insights
- Recommendations

Dataset Description

The dataset includes 36 months of data with the following fields:

- Month
- Sales
- COGS
- Expenses
- Profit
- Orders
- Customers

Objective

To create a clear, interactive dashboard that provides meaningful business insights.

How to Use (Power BI / Tableau)

1. Load the dataset (CSV or Excel).
2. Create KPI cards for core metrics.
3. Build trend charts (Sales, Profit, COGS, Expenses).
4. Add slicers for Month and Year.
5. Arrange visuals using a clean and minimal layout.

Dataset Sample

Month	Sales	COGS	Expenses	Profit	Orders	Customers	
2022-01-31	154,231	94,550	13,982	45,698	912	763	
2022-02-28	168,820	109,220	17,402	42,198	855	601	
2022-03-31	143,950	95,022	12,995	35,933	692	553	
2022-04-30	166,592	118,112	14,667	33,813	987	711	
2022-05-31	159,118	99,073	10,961	49,084	880	609	
2022-06-30	171,530	110,840	15,235	45,455	1030	866	
2022-07-31	147,820	89,315	12,900	45,605	720	590	
2022-08-31	139,902	83,190	15,410	41,302	812	640	
2022-09-30	163,004	103,992	14,129	44,883	964	713	
2022-10-31	152,449	93,129	12,890	46,430	891	771	

KPI Summary

Primary KPIs

- **Total Sales** — Overall revenue across all months
- **Total Profit** — Profit after COGS and expenses
- **Average Order Value (AOV)** — $\text{Sales} \div \text{Orders}$
- **Profit Margin %** — $\text{Profit} \div \text{Sales}$

Secondary KPIs

- Monthly Orders
- Monthly Customers
- COGS percentage
- Expense percentage

These KPIs will form the top layer of dashboard.

Visualizations

KPI Banner

Insert KPI graphic here

(Example: Total Sales, Total Profit, AOV, Orders)

Monthly Sales Trend

Insert Sales Line Chart image here

Monthly Profit Trend

Insert Profit Line Chart image here

COGS vs Expenses

Insert COGS + Expenses Comparison Chart here

Orders & Customers Trend

Insert line or bar chart here

Dashboard Layout

Top Section

- KPI Cards
- Light background
- Simple icons
- No clutter

Middle Section

- Sales trend (line)
- Profit trend (line)
- COGS vs Expense (area/line comparison)

Bottom Section

- Data summary table
- Month/Year slicers
- Category slicer (optional)

Design Guidelines

- Use consistent colors
- Avoid bright or distracting shades
- Use readable fonts
- Maintain symmetry
- Keep whitespace for clarity

Insights from the Data

Sales

- Sales show moderate month-to-month variation.
- Strong months appear mid-year.
- End-of-year months show slight dips.

Profit

- Profit tends to follow sales but fluctuates with expenses.
- High COGS months reduce profit significantly.

COGS & Expenses

- COGS remains the biggest cost driver.
- Expenses stay comparatively stable.

Orders & Customers

- Orders increase with higher sales months.
- Customer count remains consistent with slight growth.

Recommendations

Business Recommendations

- Reduce COGS by improving supplier terms or bulk purchasing.
- Increase marketing spend in lower-performing months.
- Introduce seasonal promotions in historically weak months.

Dashboard Recommendations

- Add Year slicer for deeper drilldown.
- Add tooltips with profit margin and variance.
- Include category or region data if available.