**TITLE PAGE**

**Title:** “Financial Performance dashboard”**Project Info:** Excel, Power Bi**Domain:** Business Analyst**Data set source:** **Financial data**

**PROJECT OVERVIEW**The Financial Performance Dashboard project aims to analyse, visualize, and present key financial metrics of an organization. It enables management to make informed decisions by tracking revenues, expenses, profitability, and other critical KPIs.**OBJECTIVES**

* Monitor financial health and profitability trends.
* Identify revenue growth patterns.
* Track expenses and cost efficiency.
* Support data-driven decision-making with visual insights.

**OVERVIEW**

* **REQUIRED DATA**
* Sales data (sale, product, gross).
* Expense data, Profit and loss, Discount.

**STEPS TO BUILD THE DASHBOARD**

**TASK 1:** Data importing and preparation**CONNECT TO DATA:**

* Open power Bi, click the data and report the data set from Excel (CSV file)
* Ensure that the Date, Month Number, Month Name, and Year fields are correctly formatted as date

**CREATE CALCULATED FIELDS:**

* We'll create some calculated fields for deeper analysis.

**Creating Measures:Total sales:**Total sales=sum([sales])**Total profit:**Total profit=sum([profit])**Total quality:**Total quality=sum ([Unit sold])**Cogs:**Cogs=sum([cogs])**Products:**Total product=sum([products])

**TASK 2:** visualizations**Using slicer:Year -**

Selecting the total year and visualizing any of the choice.

**Month -**

Accessing the month name then visualizing as any of choice.

**Product -**

Selecting the all the products and visualizing some of them as wish

**Using Cards: Total sales-**By selecting the total sales from the measured data by doing directly summationThen displaying the calculation of total sales according to the data

**Total profit**-

1.Selecting the total sales from the measured data by doing directly summation 2. Then visualizing the total profit**Total quality**-To calculate the total quality, selecting the total summation of unit sold

**COGS-**

Selecting the total summation of cogs and visualizing the total output data**Product-**

selecting the product from the data the it directly visualize the total products.

**Build visuals of Clusterd chart, Pie chart, Donut chart, Column chart**

**TASK 3:**

* Select the “**line and clustered column chart”**
* Accessing sum of sales, sum of profit and product from the data
* Taking x-axis and y-axis then drag product to the x-axis , sum of sales to the column y-axis and sum of profits to the line y-axis
* Then it visualizes the result of total sales and total profit by product

**TASK 4:**

* Selecting the “**pie chart”**
* Accessing sum of sales and segment
* Taking segment as legend and sum of sales as value
* Segment like small business, government, enterprise, mid-market… as of choice
* Then it visualizes the Percentages of total sales by segment

**TASK 5:**

* Selecting the **“donut chart”**
* Accessing the sum of sales and country
* Taking the country as the legend and sum of sales as values
* So it visualizes the total sales by country

**TASK 6:**

* Selecting the **“clustered column chart”**
* Accessing the sum of sales and segment
* Taking x-axis and y-axis then drag the segment to the

x-axis and sum of sales to the y-axis

* In this process accessing more visualization of pie chart
* In that accessing the sum of discount and product, taking product as legend and sum of discounts as values
* Then it visualizes the percentage of sum of discounts by product
* By adding finally, it visualizes the total sales by segment

**TASK 7:**

* To get more details of the data
* Selecting the slicer and drag the country into the field
* Then it displays the country name
* In the selection process by choosing the particular country it change the values of the calculation models including charts

**Format visuals and layouts**

* In the creation of dashboard adding datalables, changing colors for readability
* Also applying the themes

**DASHBOARD LAYOUT**

* Arranged the KP at the top
* Placed the chart below in grid style
* Also, slicer aligned.

**FINANCIAL PERFORMANCE DASHBOARD LAYOUT**

A screenshot of a financial dashboard

AI-generated content may be incorrect.