

SALES ANALYSIS REPORT

09 Aug, 2024

By: Bidhan Pant



Sales Report

CHOCO BOOM!

Total Sales \$34M		Total Boxes 2M		Total Shipments 6K		Total Costs \$13.52M		Total Profit \$20.52M	
Latest MoM Sales Change % -10.76%		Latest MoM Boxes Change % -17.47%		Latest MoM Shipments Change % -10.56%		Latest MoM Total Cost Change % -19.31%		Latest MoM Total Profit Change % -4.94%	

Sales

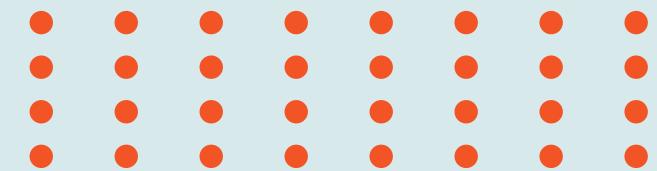
Sales by Start of Month

Month	Sales (\$M)
Mar 2023	~2.30
Apr 2023	~2.80
May 2023	~2.40
Jun 2023	~2.70
Jul 2023	~2.60
Aug 2023	~2.60
Sep 2023	~2.70
Oct 2023	~2.80
Nov 2023	~2.30
Dec 2023	~2.90
Jan 2024	~2.70
Feb 2024	~2.50

Total Shipments by Boxes (bins)

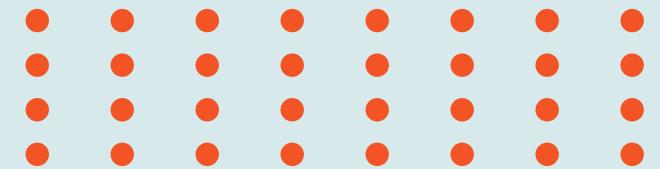
Sales person

Sales person	Sales	Profit	Profit %	Target Met
Jan Morforth	\$1,372,491	\$788,685.10	57.46%	
Andria Kimpton	\$1,254,488	\$717,522.20	57.20%	
Camilla Castle	\$1,398,227	\$853,801.67	61.06%	
Madelene Upcott	\$1,303,576	\$702,767.79	53.91%	
Marney O'Brien	\$1,325,385	\$884,148.43	66.71%	
Kelci Walkden	\$1,517,603	\$988,319.70	65.12%	
Gigi Bohling	\$1,365,107	\$858,416.05	62.88%	
Rafaelita Blaksland	\$1,502,559	\$958,816.47	63.81%	
Dotty Strutley	\$1,423,994	\$892,575.79	62.68%	
Karlen McCaffrey	\$1,311,800	\$752,433.84	57.36%	
Jehu Rudeforth	\$1,388,151	\$853,162.94	61.46%	
Husein Augar	\$1,473,073	\$926,895.37	62.92%	
Kaine Padly	\$1,380,400	\$844,962.30	61.21%	
Gunar Cockshoot	\$1,382,373	\$860,283.62	62.23%	



Introduction

Welcome to the sales data analysis of Choco Boom Pvt. Ltd. In this analysis, I will be exploring various key metrics related to the company's performance, focusing on sales, profit, shipments, and the number of boxes used. Using a Power BI dashboard, I aim to uncover valuable insights that can help drive strategic decisions and optimize operations. This analysis will provide a clear overview of how different factors influence our sales outcomes and identify areas where we can improve efficiency and profitability.



The project is about sales analysis of the chocolate company



Steps I am going to do in this projects are:

- I will be looking at sales, boxes and profits by calculating various measures for these things.
- I will be looking at how sales person and product is being performing.
- I will be looking at shipment category i.e. low box shipment analysis.
- I will also look into Months on Months (MoM) and Years on Years (YoY) changes to all the key metric like total sales and total profit.
- Finally the interactive dashboard will be saved and published so that other can see it.

About

The Data Model

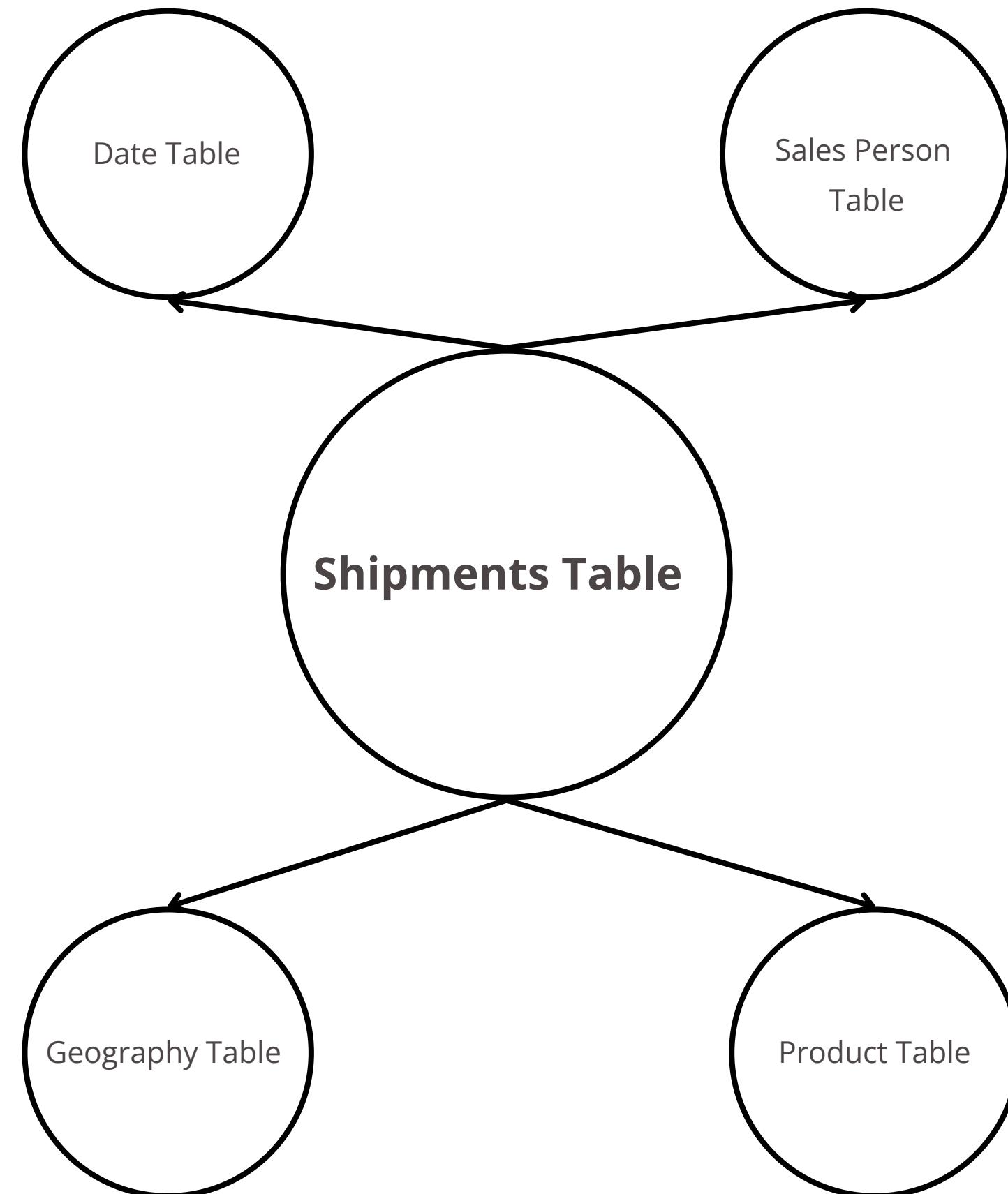
The data model is structured into five tables, with a central fact table called the "Shipments" table, surrounded by four dimensional tables: Date, Sales Person, Geography, and Product.

How It Works

The central Shipments table records each shipment event. Each shipment is associated with:

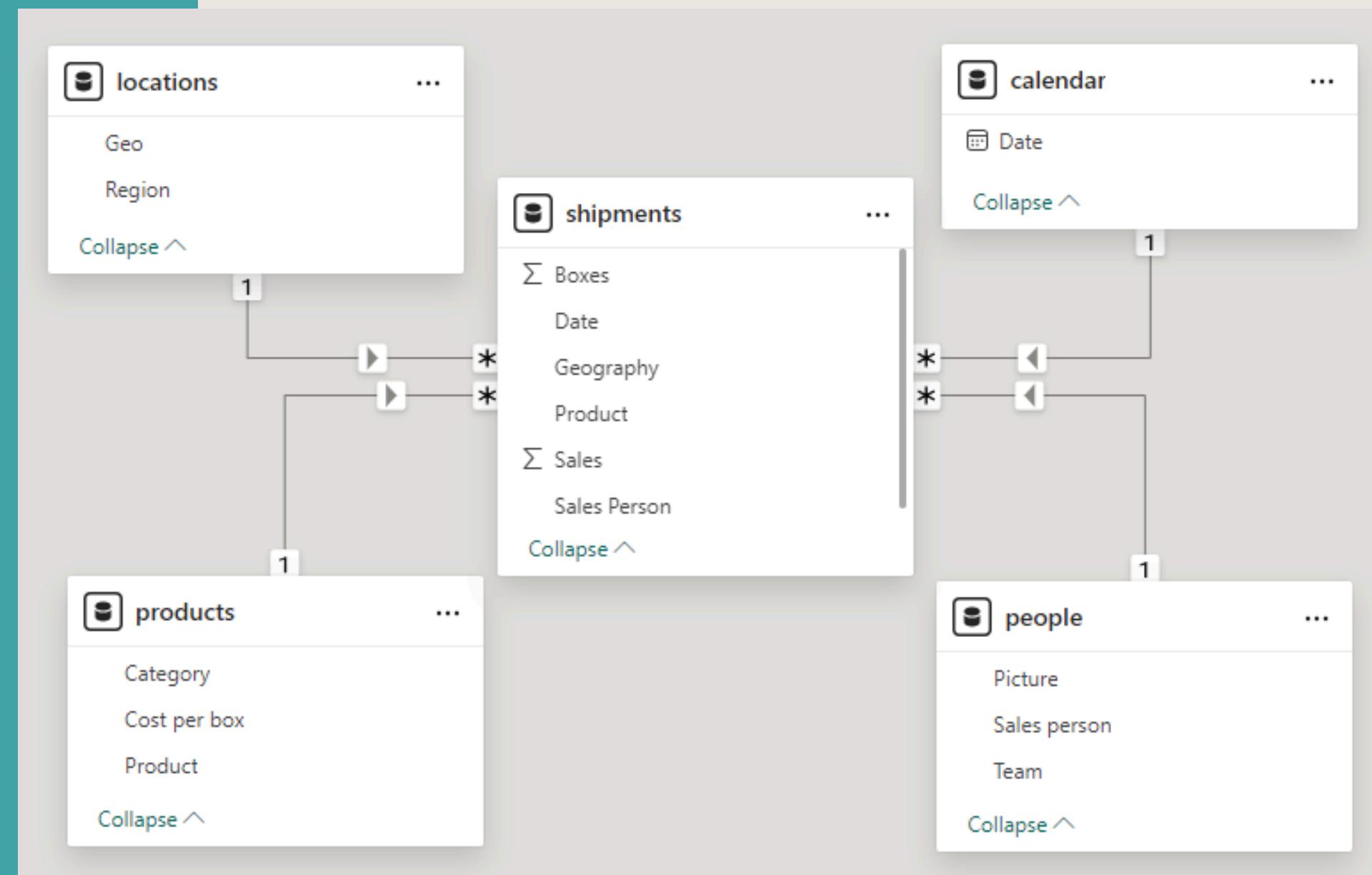
- **A Sales Person:** Linked from the Sales Person table, indicating who made the sale.
- **A Product:** Sourced from the Product table, specifying what was sold.
- **A Location:** Derived from the Geography table, detailing where the shipment was made.
- **A Time Period:** Retrieved from the Date table, indicating when the shipment occurred.

This model enables a comprehensive analysis of the sales cycle, tracking each shipment from the initiation by a sales person, through the specific product sold, the location of the sale, and the time period in which it took place.

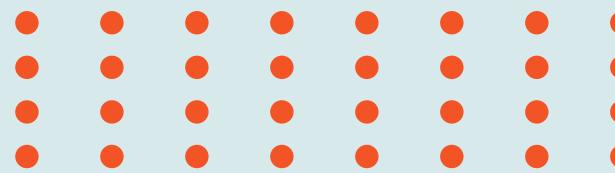
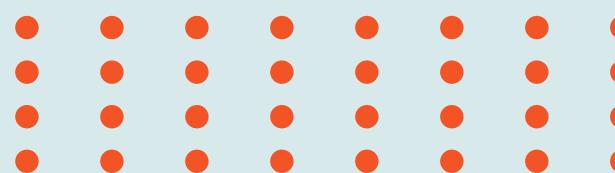


Load Data

Here we have successfully loaded our dataset into the power BI. As you can see we have one main fact table into the middle and other four dimensional tables which makes Star Schema.



DAX Measures



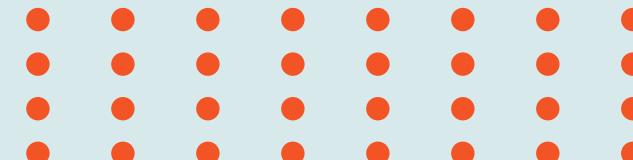
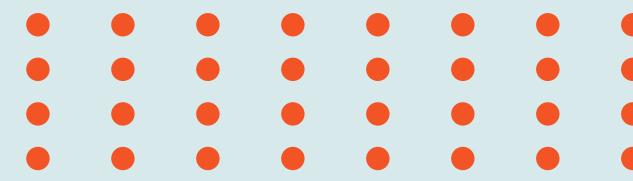
Below are the some simple DAX calculation that I have performed in this sales analysis

- **Total Sales** = SUM(shipments[Sales])
- **Total Boxes** = SUM(shipments[Boxes])
- **Total Shipments** = COUNTROWS(shipments)
- **Total Costs** =
SUMX(shipments,shipments[Boxes]*RELATED(products[Cost per box]))
- **Total Profit** = [Total Sales] - [Total Costs]
- **Profit %** = DIVIDE([Total Profit],[Total Sales])
- **Low Box Shipments (LBS) count** =
CALCULATE([Total Shipments],shipments[Boxes]<50)
- **LBS %** = DIVIDE([LBS count], [Total Shipments])



\$34,042,511	6113	\$20,524,070.34	\$13,518,440.91
Total Sales	Total Shipme...	Total Profit	Total Costs
2,077,844	60.29%	624	10.21%
Total Boxes	Profit %	LBS count	LBS %

Complex DAX Measures



Some complex DAX measures are:

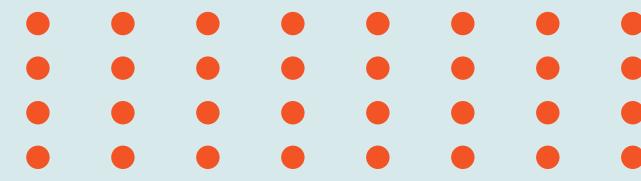
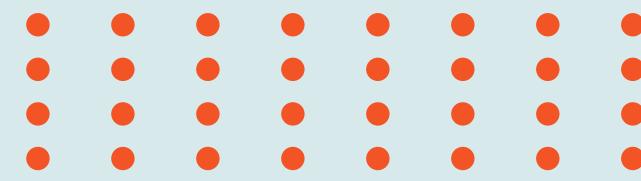
Month on Month (MoM) Sales Change %

```
1 MoM Sales Change % =  
2     var this_month = [Total Sales]  
3     var prev_month = CALCULATE([Total Sales], PREVIOUSMONTH('calendar'[Date]))  
4 RETURN  
5     DIVIDE(this_month - prev_month, prev_month)
```



Start of Month	Total Sales	MoM Sales Change %
Wednesday, February 01, 2023	\$2,271,726	
Wednesday, March 01, 2023	\$2,769,476	21.91%
Saturday, April 01, 2023	\$2,395,139	-13.52%
Monday, May 01, 2023	\$2,797,045	16.78%
Thursday, June 01, 2023	\$2,543,715	-9.06%
Saturday, July 01, 2023	\$2,599,720	2.20%
Tuesday, August 01, 2023	\$2,591,705	-0.31%
Friday, September 01, 2023	\$2,649,668	2.24%
Sunday, October 01, 2023	\$2,845,233	7.38%
Wednesday, November 01, 2023	\$2,279,050	-19.90%
Friday, December 01, 2023	\$2,938,829	28.95%
Monday, January 01, 2024	\$2,833,090	-3.60%
Thursday, February 01, 2024	\$2,528,118	-10.76%
Total	\$34,042,511	

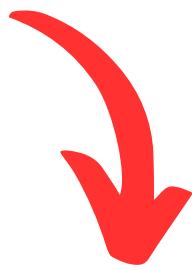
Complex DAX Measures



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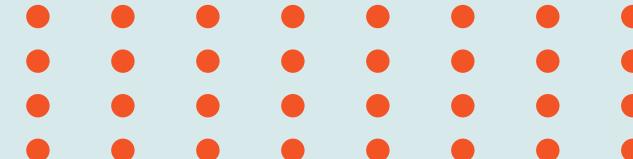
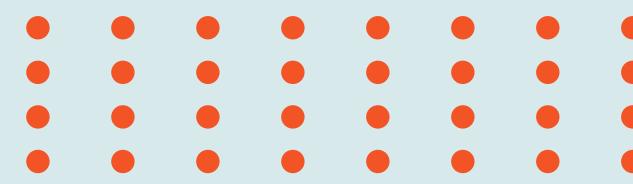
Month on Month (MoM) Boxes Change %

```
1 MoM Boxes Change % =  
2     var this_month = [Total Boxes]  
3     var prev_month = CALCULATE([Total Boxes], PREVIOUSMONTH('calendar'[Date]))  
4 RETURN  
5     DIVIDE(this_month - prev_month, prev_month)
```



Start of Month	Total Boxes	MoM Boxes Change %
Wednesday, February 01, 2023	137,447	
Wednesday, March 01, 2023	162,775	18.43%
Saturday, April 01, 2023	146,607	-9.93%
Monday, May 01, 2023	174,681	19.15%
Thursday, June 01, 2023	150,905	-13.61%
Saturday, July 01, 2023	158,656	5.14%
Tuesday, August 01, 2023	167,756	5.74%
Friday, September 01, 2023	167,619	-0.08%
Sunday, October 01, 2023	176,885	5.53%
Wednesday, November 01, 2023	146,759	-17.03%
Friday, December 01, 2023	171,911	17.14%
Monday, January 01, 2024	173,039	0.66%
Thursday, February 01, 2024	142,804	-17.47%
Total	2,077,844	

Complex DAX Measures



Some complex DAX measures are:

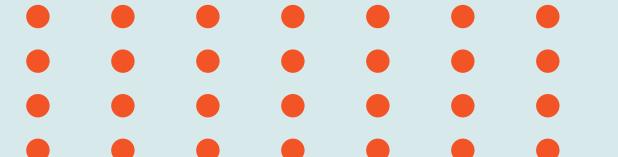
Month on Month (MoM) Cost Change %

```
1 MoM Cost Change % =  
2     var this_month = [Total Costs]  
3     var prev_month = CALCULATE([Total Costs], PREVIOUSMONTH('calendar'[Date]))  
4 RETURN  
5     DIVIDE(this_month - prev_month, prev_month)
```



Start of Month	Total Costs	MoM Cost Change %
Wednesday, February 01, 2023	\$886,528.54	
Wednesday, March 01, 2023	\$1,089,151.97	22.86%
Saturday, April 01, 2023	\$906,391.26	-16.78%
Monday, May 01, 2023	\$1,114,726.30	22.99%
Thursday, June 01, 2023	\$1,012,377.06	-9.18%
Saturday, July 01, 2023	\$1,069,431.97	5.64%
Tuesday, August 01, 2023	\$1,050,601.81	-1.76%
Friday, September 01, 2023	\$1,107,895.30	5.45%
Sunday, October 01, 2023	\$1,111,759.23	0.35%
Wednesday, November 01, 2023	\$980,980.75	-11.76%
Friday, December 01, 2023	\$1,113,557.30	13.51%
Monday, January 01, 2024	\$1,148,411.84	3.13%
Thursday, February 01, 2024	\$926,627.58	-19.31%
Total	\$13,518,440.91	

Complex DAX Measures



Some complex DAX measures are:

Month on Month (MoM) Profit Change %

```
1 MoM Profit Change % =  
2     var this_month = [Total Profit]  
3     var prev_month = CALCULATE([Total Profit], PREVIOUSMONTH('calendar'[Date]))  
4 RETURN  
5     DIVIDE(this_month - prev_month, prev_month)
```



Start of Month	Total Profit	MoM Profit Change %
Wednesday, February 01, 2023	\$1,385,197.46	
Wednesday, March 01, 2023	\$1,680,323.53	21.31%
Saturday, April 01, 2023	\$1,488,747.24	-11.40%
Monday, May 01, 2023	\$1,682,318.45	13.00%
Thursday, June 01, 2023	\$1,531,337.94	-8.97%
Saturday, July 01, 2023	\$1,530,287.78	-0.07%
Tuesday, August 01, 2023	\$1,541,103.44	0.71%
Friday, September 01, 2023	\$1,541,772.20	0.04%
Sunday, October 01, 2023	\$1,733,473.77	12.43%
Wednesday, November 01, 2023	\$1,298,069.00	-25.12%
Friday, December 01, 2023	\$1,825,271.20	40.61%
Monday, January 01, 2024	\$1,684,677.91	-7.70%
Thursday, February 01, 2024	\$1,601,490.42	-4.94%
Total	\$20,524,070.34	



Complex DAX Measures

Some complex DAX measures are:

Month on Month (MoM) Shipment Change %

```
1 MoM Shipment Change % =  
2     var this_month = [Total Shipments]  
3     var prev_month = CALCULATE([Total Shipments], PREVIOUSMONTH('calendar'[Date]))  
4 RETURN  
5     DIVIDE(this_month - prev_month, prev_month)
```



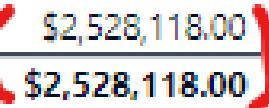
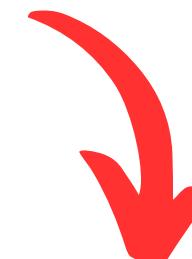
Start of Month	Total Shipments	MoM Shipment Change %
Wednesday, February 01, 2023	402	
Wednesday, March 01, 2023	480	19.40%
Saturday, April 01, 2023	425	-11.46%
Monday, May 01, 2023	503	18.35%
Thursday, June 01, 2023	440	-12.52%
Saturday, July 01, 2023	472	7.27%
Tuesday, August 01, 2023	488	3.39%
Friday, September 01, 2023	477	-2.25%
Sunday, October 01, 2023	508	6.50%
Wednesday, November 01, 2023	438	-13.78%
Friday, December 01, 2023	529	20.78%
Monday, January 01, 2024	502	-5.10%
Thursday, February 01, 2024	449	-10.56%
Total	6113	

Complex DAX Measures

Some complex DAX measures are:

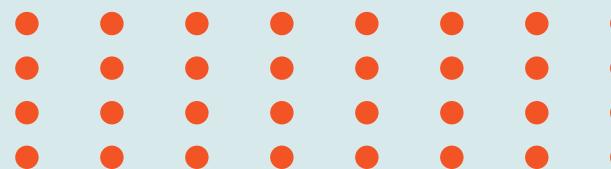
Total Sales of Latest Month

```
1 Total Sales Latest Month =  
2     var ld = [Latest Date]  
3 RETURN  
4     CALCULATE([Total Sales], 'calendar'[Start of Month] = ld)
```



Start of Month	Total Sales	Latest Date	Total Sales Latest Month
Wednesday, February 01, 2023	\$2,271,726	2/1/2023 12:00:00 AM	\$2,271,726.00
Wednesday, March 01, 2023	\$2,769,476	3/1/2023 12:00:00 AM	\$2,769,475.50
Saturday, April 01, 2023	\$2,395,139	4/1/2023 12:00:00 AM	\$2,395,138.50
Monday, May 01, 2023	\$2,797,045	5/1/2023 12:00:00 AM	\$2,797,044.75
Thursday, June 01, 2023	\$2,543,715	6/1/2023 12:00:00 AM	\$2,543,715.00
Saturday, July 01, 2023	\$2,599,720	7/1/2023 12:00:00 AM	\$2,599,719.75
Tuesday, August 01, 2023	\$2,591,705	8/1/2023 12:00:00 AM	\$2,591,705.25
Friday, September 01, 2023	\$2,649,668	9/1/2023 12:00:00 AM	\$2,649,667.50
Sunday, October 01, 2023	\$2,845,233	10/1/2023 12:00:00 AM	\$2,845,233.00
Wednesday, November 01, 2023	\$2,279,050	11/1/2023 12:00:00 AM	\$2,279,049.75
Friday, December 01, 2023	\$2,938,829	12/1/2023 12:00:00 AM	\$2,938,828.50
Monday, January 01, 2024	\$2,833,090	1/1/2024 12:00:00 AM	\$2,833,089.75
Thursday, February 01, 2024	\$2,528,118	2/1/2024 12:00:00 AM	\$2,528,118.00
Total	\$34,042,511	2/1/2024 12:00:00 AM	\$2,528,118.00

Complex DAX Measures



Some complex DAX measures are:

Latest MoM Sales Change %

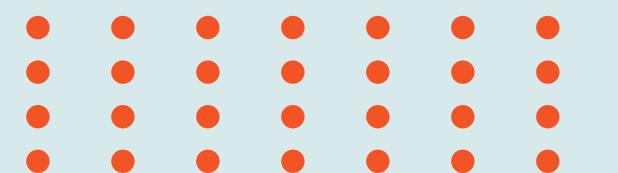
```
1 Latest MoM Sales Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total Sales Latest Month]  
4     var prev_month_sales = CALCULATE([Total Sales], 'calendar'[Start of Month] = EDATE(ld,-1))  
5     RETURN  
6         DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Total Sales	Latest Date	Total Sales Latest Month	Latest MoM Sales Change %
Wednesday, February 01, 2023	\$2,271,726	2/1/2023 12:00:00 AM	\$2,271,726.00	
Wednesday, March 01, 2023	\$2,769,476	3/1/2023 12:00:00 AM	\$2,769,475.50	21.91%
Saturday, April 01, 2023	\$2,395,139	4/1/2023 12:00:00 AM	\$2,395,138.50	-13.52%
Monday, May 01, 2023	\$2,797,045	5/1/2023 12:00:00 AM	\$2,797,044.75	16.78%
Thursday, June 01, 2023	\$2,543,715	6/1/2023 12:00:00 AM	\$2,543,715.00	-9.06%
Saturday, July 01, 2023	\$2,599,720	7/1/2023 12:00:00 AM	\$2,599,719.75	2.20%
Tuesday, August 01, 2023	\$2,591,705	8/1/2023 12:00:00 AM	\$2,591,705.25	-0.31%
Friday, September 01, 2023	\$2,649,668	9/1/2023 12:00:00 AM	\$2,649,667.50	2.24%
Sunday, October 01, 2023	\$2,845,233	10/1/2023 12:00:00 AM	\$2,845,233.00	7.38%
Wednesday, November 01, 2023	\$2,279,050	11/1/2023 12:00:00 AM	\$2,279,049.75	-19.90%
Friday, December 01, 2023	\$2,938,829	12/1/2023 12:00:00 AM	\$2,938,828.50	28.95%
Monday, January 01, 2024	\$2,833,090	1/1/2024 12:00:00 AM	\$2,833,089.75	-3.60%
Thursday, February 01, 2024	\$2,528,118	2/1/2024 12:00:00 AM	\$2,528,118.00	-10.76%
Total	\$34,042,511	2/1/2024 12:00:00 AM	\$2,528,118.00	-10.76%



Complex DAX Measures



Some complex DAX measures are:

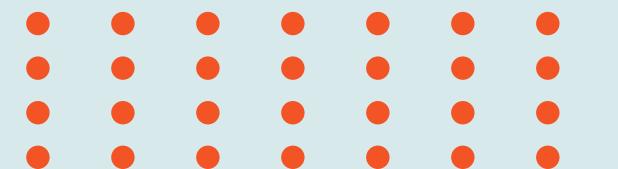
Latest MoM Boxes Change %

```
1 Latest MoM Boxes Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total Boxes Latest Month]  
4     var prev_month_sales = CALCULATE([Total Boxes], 'calendar'[Start of Month] = EDATE(ld,-1))  
5 RETURN  
6     DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Latest Date	Total Boxes	Total Boxes Latest Month	Latest MoM Boxes Change %
Wednesday, February 01, 2023	2/1/2023 12:00:00 AM	137,447	137447	
Wednesday, March 01, 2023	3/1/2023 12:00:00 AM	162,775	162775	18.43%
Saturday, April 01, 2023	4/1/2023 12:00:00 AM	146,607	146607	-9.93%
Monday, May 01, 2023	5/1/2023 12:00:00 AM	174,681	174681	19.15%
Thursday, June 01, 2023	6/1/2023 12:00:00 AM	150,905	150905	-13.61%
Saturday, July 01, 2023	7/1/2023 12:00:00 AM	158,656	158656	5.14%
Tuesday, August 01, 2023	8/1/2023 12:00:00 AM	167,756	167756	5.74%
Friday, September 01, 2023	9/1/2023 12:00:00 AM	167,619	167619	-0.08%
Sunday, October 01, 2023	10/1/2023 12:00:00 AM	176,885	176885	5.53%
Wednesday, November 01, 2023	11/1/2023 12:00:00 AM	146,759	146759	-17.03%
Friday, December 01, 2023	12/1/2023 12:00:00 AM	171,911	171911	17.14%
Monday, January 01, 2024	1/1/2024 12:00:00 AM	173,039	173039	0.66%
Thursday, February 01, 2024	2/1/2024 12:00:00 AM	142,804	142804	-17.47%
Total	2/1/2024 12:00:00 AM	2,077,844	142804	-17.47%

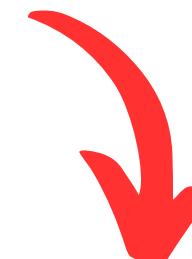
Complex DAX Measures



Some complex DAX measures are:

Latest MoM Shipments Change %

```
1 Latest MoM Shipments Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total Shipments Latest Month]  
4     var prev_month_sales = CALCULATE([Total Shipments], 'calendar'[Start of Month] = EDATE(ld,-1))  
5     RETURN  
6     DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Latest Date	Total Shipments Latest Month	Latest MoM Shipments Change %
Wednesday, February 01, 2023	2/1/2023 12:00:00 AM	402	
Wednesday, March 01, 2023	3/1/2023 12:00:00 AM	480	19.40%
Saturday, April 01, 2023	4/1/2023 12:00:00 AM	425	-11.46%
Monday, May 01, 2023	5/1/2023 12:00:00 AM	503	18.35%
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Saturday, July 01, 2023	7/1/2023 12:00:00 AM	472	7.27%
Tuesday, August 01, 2023	8/1/2023 12:00:00 AM	488	3.39%
Friday, September 01, 2023	9/1/2023 12:00:00 AM	477	-2.25%
Sunday, October 01, 2023	10/1/2023 12:00:00 AM	508	6.50%
Wednesday, November 01, 2023	11/1/2023 12:00:00 AM	438	-13.78%
Friday, December 01, 2023	12/1/2023 12:00:00 AM	529	20.78%
Monday, January 01, 2024	1/1/2024 12:00:00 AM	502	-5.10%
Thursday, February 01, 2024	2/1/2024 12:00:00 AM	449	-10.56%
Total	2/1/2024 12:00:00 AM	449	-10.56%



Complex DAX Measures

Some complex DAX measures are:

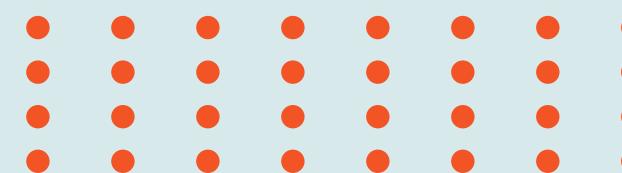
Latest MoM Total Cost Change %

```
1 Latest MoM Total Cost Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total Cost Latest Month]  
4     var prev_month_sales = CALCULATE([Total Costs], 'calendar'[Start of Month] = EDATE(ld,-1))  
5     RETURN  
6         DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Latest Date	Total Cost Latest Month	Latest MoM Total Cost Change %
Wednesday, February 01, 2023	2/1/2023 12:00:00 AM	886,528.54	
Wednesday, March 01, 2023	3/1/2023 12:00:00 AM	1,089,151.97	22.86%
Saturday, April 01, 2023	4/1/2023 12:00:00 AM	906,391.26	-16.78%
Monday, May 01, 2023	5/1/2023 12:00:00 AM	1,114,726.30	22.99%
Thursday, June 01, 2023	6/1/2023 12:00:00 AM	1,012,377.06	-9.18%
Saturday, July 01, 2023	7/1/2023 12:00:00 AM	1,069,431.97	5.64%
Tuesday, August 01, 2023	8/1/2023 12:00:00 AM	1,050,601.81	-1.76%
Friday, September 01, 2023	9/1/2023 12:00:00 AM	1,107,895.30	5.45%
Sunday, October 01, 2023	10/1/2023 12:00:00 AM	1,111,759.23	0.35%
Wednesday, November 01, 2023	11/1/2023 12:00:00 AM	980,980.75	-11.76%
Friday, December 01, 2023	12/1/2023 12:00:00 AM	1,113,557.30	13.51%
Monday, January 01, 2024	1/1/2024 12:00:00 AM	1,148,411.84	3.13%
Thursday, February 01, 2024	2/1/2024 12:00:00 AM	926,627.58	-19.31%
Total	2/1/2024 12:00:00 AM	926,627.58	-19.31%

Complex DAX Measures



Some complex DAX measures are:

Latest MoM Total Profit Change %

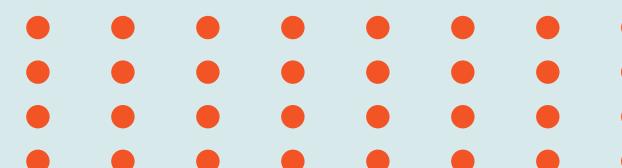
```
1 Latest MoM Total Profit Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total Profit Latest Month]  
4     var prev_month_sales = CALCULATE([Total Profit], 'calendar'[Start of Month] = EDATE(ld,-1))  
5     RETURN  
6     DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Latest Date	Total Profit Latest Month	Latest MoM Total Profit Change %
Wednesday, February 01, 2023	2/1/2023 12:00:00 AM	1,385,197.46	
Wednesday, March 01, 2023	3/1/2023 12:00:00 AM	1,680,323.53	21.31%
Saturday, April 01, 2023	4/1/2023 12:00:00 AM	1,488,747.24	-11.40%
Monday, May 01, 2023	5/1/2023 12:00:00 AM	1,682,318.45	13.00%
Thursday, June 01, 2023	6/1/2023 12:00:00 AM	1,531,337.94	-8.97%
Saturday, July 01, 2023	7/1/2023 12:00:00 AM	1,530,287.78	-0.07%
Tuesday, August 01, 2023	8/1/2023 12:00:00 AM	1,541,103.44	0.71%
Friday, September 01, 2023	9/1/2023 12:00:00 AM	1,541,772.20	0.04%
Sunday, October 01, 2023	10/1/2023 12:00:00 AM	1,733,473.77	12.43%
Wednesday, November 01, 2023	11/1/2023 12:00:00 AM	1,298,069.00	-25.12%
Friday, December 01, 2023	12/1/2023 12:00:00 AM	1,825,271.20	40.61%
Monday, January 01, 2024	1/1/2024 12:00:00 AM	1,684,677.91	-7.70%
Thursday, February 01, 2024	2/1/2024 12:00:00 AM	1,601,490.42	-4.94%
Total	2/1/2024 12:00:00 AM	1,601,490.42	-4.94%



Complex DAX Measures



Some complex DAX measures are:

Latest MoM Profit % Change %

```
1 Latest MoM Profit % Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total Profit % Latest Month]  
4     var prev_month_sales = CALCULATE([Profit %], 'calendar'[Start of Month] = EDATE(ld,-1))  
5 RETURN  
6     DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Latest Date	Total Profit % Latest Month	Latest MoM Profit % Change %
Wednesday, February 01, 2023	2/1/2023 12:00:00 AM	60.98%	
Wednesday, March 01, 2023	3/1/2023 12:00:00 AM	60.67%	-0.50%
Saturday, April 01, 2023	4/1/2023 12:00:00 AM	62.16%	2.45%
Monday, May 01, 2023	5/1/2023 12:00:00 AM	60.15%	-3.23%
Thursday, June 01, 2023	6/1/2023 12:00:00 AM	60.20%	0.09%
Saturday, July 01, 2023	7/1/2023 12:00:00 AM	58.86%	-2.22%
Tuesday, August 01, 2023	8/1/2023 12:00:00 AM	59.46%	1.02%
Friday, September 01, 2023	9/1/2023 12:00:00 AM	58.19%	-2.15%
Sunday, October 01, 2023	10/1/2023 12:00:00 AM	60.93%	4.71%
Wednesday, November 01, 2023	11/1/2023 12:00:00 AM	56.96%	-6.51%
Friday, December 01, 2023	12/1/2023 12:00:00 AM	62.11%	9.05%
Monday, January 01, 2024	1/1/2024 12:00:00 AM	59.46%	-4.26%
Thursday, February 01, 2024	2/1/2024 12:00:00 AM	63.35%	6.53%
Total	2/1/2024 12:00:00 AM	63.35%	6.53%



Complex DAX Measures

Some complex DAX measures are:

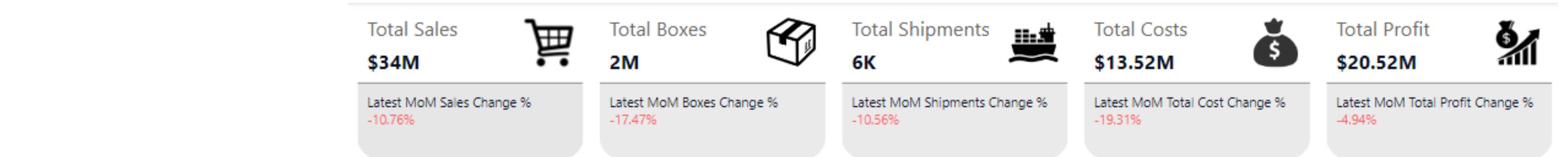
Latest MoM LBS % Change %

```
1 Latest LBS % Change % =  
2     var ld = [Latest Date]  
3     var this_month_sales = [Total LBS % Latest Month]  
4     var prev_month_sales = CALCULATE([LBS %], 'calendar'[Start of Month] = EDATE(ld,-1))  
5 RETURN  
6     DIVIDE(this_month_sales-prev_month_sales, prev_month_sales)
```



Start of Month	Latest Date	Total LBS % Latest Month	Latest LBS % Change %
Wednesday, February 01, 2023	2/1/2023 12:00:00 AM	6.72%	
Wednesday, March 01, 2023	3/1/2023 12:00:00 AM	9.79%	45.79%
Saturday, April 01, 2023	4/1/2023 12:00:00 AM	11.53%	17.75%
Monday, May 01, 2023	5/1/2023 12:00:00 AM	10.34%	-10.33%
Thursday, June 01, 2023	6/1/2023 12:00:00 AM	11.59%	12.12%
Saturday, July 01, 2023	7/1/2023 12:00:00 AM	11.65%	0.53%
Tuesday, August 01, 2023	8/1/2023 12:00:00 AM	10.45%	-10.31%
Friday, September 01, 2023	9/1/2023 12:00:00 AM	10.90%	4.31%
Sunday, October 01, 2023	10/1/2023 12:00:00 AM	11.02%	1.12%
Wednesday, November 01, 2023	11/1/2023 12:00:00 AM	8.22%	-25.44%
Friday, December 01, 2023	12/1/2023 12:00:00 AM	9.64%	17.30%
Monday, January 01, 2024	1/1/2024 12:00:00 AM	8.37%	-13.22%
Thursday, February 01, 2024	2/1/2024 12:00:00 AM	12.25%	46.41%
Total	2/1/2024 12:00:00 AM	12.25%	46.41%

KPI Cards



Creating KPI Cards

- **Metric Value:** Each card prominently displays the current value of the metric (e.g., \$34M for Total Sales). This is typically the most important piece of information.
- **MoM Change:** Below the metric value, the latest MoM percentage change is displayed. A negative change is shown in red to indicate a decrease.
- **Consistent Layout:** Each card follows the same layout, making it easy to compare metrics at a glance.
- **Color Coding:** The use of red for negative changes quickly draws attention to areas that may need improvement.

These KPI cards provide a quick overview of key business metrics and their recent performance trends, enabling stakeholders to make informed decisions. The MoM change helps in understanding how these metrics are evolving over time, highlighting areas that may need attention.



Profit % Gauge Chart



Profit %

To show the profit I have added gauge chart which shows the total profit % of the Chocolate Prints company.

Trend Analysis

Customer Segmentation Insights

- First, field was created as shown in the left side of this page. **Modeling --> New Parameter --> Field**
- Then used in line graph along with new card graph so that we can visualize all the parameters together.

Parameters

Add parameters to visuals and DAX expressions so people can use slicers to adjust the inputs and see different outcomes. [Learn more](#)

What will your variable adjust?

Fields

Name

Select Measure

Add and reorder fields

Total Sales	X
Total Boxes	X
Total Shipments	X
Total Costs	X
Total Profit	X
Profit %	X

Add slicer to this page



Fields

Search

- MoM Cost Change %
- MoM Profit Change %
- MoM Sales Change %
- MoM Shipment Change %
- Profit %
- Total Boxes
- Total Boxes Latest Month
- Total Cost Latest Month
- Total Costs
- Total LBS % Latest Month
- Total Profit
- Total Profit % Latest Month
- Total Profit Latest Month

Create

Cancel

Shipment Analysis

Groups

Name *

Field

Group type

Bin type

Min value

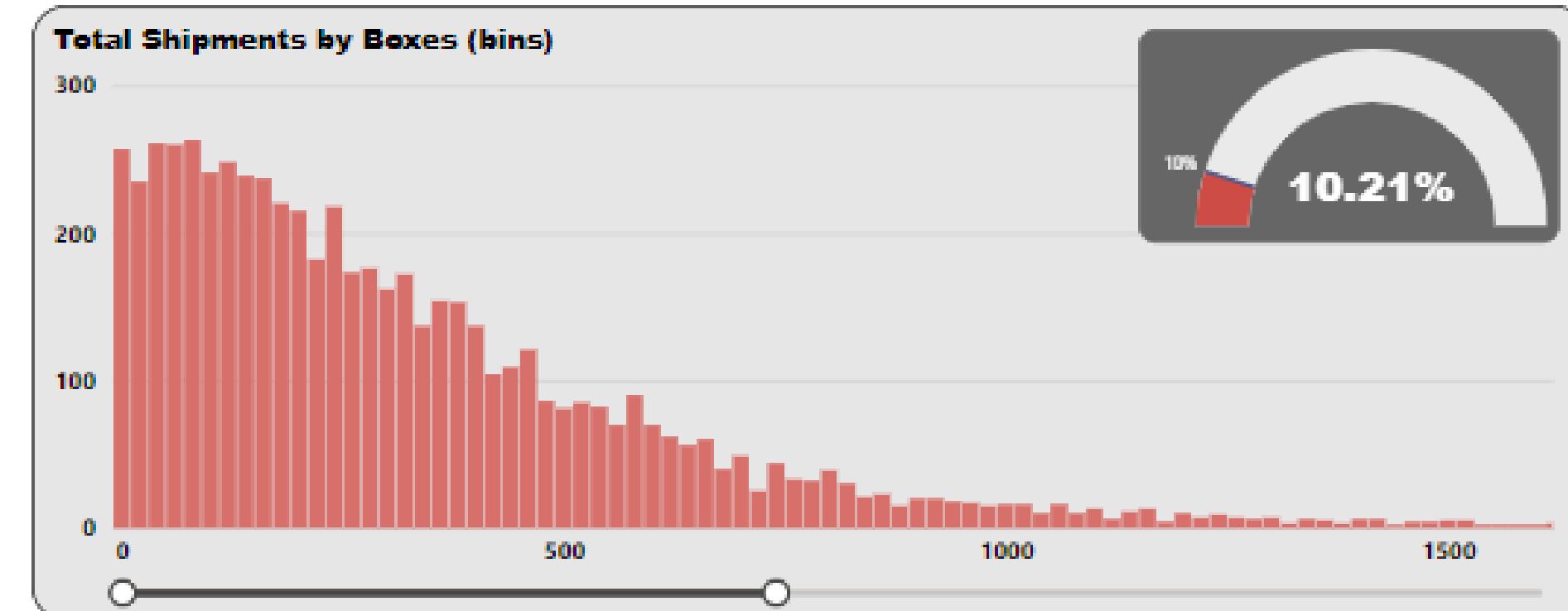
Max value

Binning splits numeric or date/time data into equally sized groups. Enter bin size.

Bin size *

OK

Cancel



Customer Segmentation Insights

- 1. Created a new group for boxes with a bin size of 20, visualized using a column chart.
- 2. Displayed the Low Boxes % using a gauge chart.

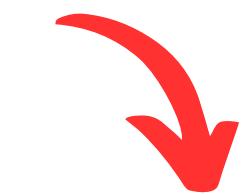
Sales Person Performance Table



Sales person	Sales	Profit	Profit %	Profit Target Met
Jan Morforth	\$1,372,491	\$788,685.10	57.46%	✗
Andria Kimpton	\$1,254,488	\$717,522.20	57.20%	✗
Camilla Castle	\$1,398,227	\$853,801.67	61.06%	✓
Madelene Upcott	\$1,303,576	\$702,767.79	53.91%	✗
Marney O'Brien	\$1,325,385	\$884,148.43	66.71%	✓
Kelci Walkden	\$1,517,603	\$988,319.70	65.12%	✓
Gigi Bohling	\$1,365,107	\$858,416.05	62.88%	✓
Rafaelita Blaksland	\$1,502,559	\$958,816.47	63.81%	✓
Dotty Strutley	\$1,423,994	\$892,575.79	62.68%	✓
Karlen McCaffrey	\$1,311,800	\$752,433.84	57.36%	✗
Jehu Rudeforth	\$1,388,151	\$853,162.94	61.46%	✓
Husein Augar	\$1,473,073	\$926,895.37	62.92%	✓
Kaine Padly	\$1,380,400	\$844,962.30	61.21%	✓
Gunar Cockshoot	\$1,382,373	\$860,283.62	62.23%	✓



Product Performance Table



Product	Sales	Profit	Profit %	Profit Target Met
White Choc	\$1,448,244	\$880,590.74	60.80%	✓
Spicy Special Slims	\$1,455,928	\$945,186.27	64.92%	✓
Smooth Silky Salty	\$1,716,703	\$1,449,040.71	84.41%	✓
Raspberry Choco	\$1,408,860	\$833,042.45	59.13%	✗
Peanut Butter Cubes	\$2,028,632	\$1,767,662.15	87.14%	✓
Organic Choco Syrup	\$2,107,157	\$1,207,815.75	57.32%	✗
Orange Choco	\$1,787,726	\$1,421,312.33	79.50%	✓
Mint Chip Choco	\$880,898	\$457,537.42	51.94%	✗
Milk Bars	\$1,321,522	\$997,211.19	75.46%	✓
Manuka Honey Choco	\$1,839,157	\$1,451,672.35	78.93%	✓
Fruit & Nut Bars	\$1,826,694	\$1,155,296.70	63.25%	✓
Eclairs	\$1,043,856	\$462,705.00	44.33%	✗
Drinking Coco	\$1,420,799	\$379,066.62	26.68%	✗
Choco Coated Almonds	\$1,236,267	\$944,329.44	76.39%	✓
Caramel Stuffed Bars	\$1,611,430	\$623,206.14	38.67%	✗
Baker's Choco Chips	\$1,470,161	\$255,271.89	17.36%	✗
Almond Choco	\$1,788,435	\$1,280,686.20	71.61%	✓



Adding Bookmark

The screenshot shows the Microsoft Power BI ribbon interface. The 'Format image' tab is currently selected. The ribbon tabs are: Filters, Selection, Bookmarks, and Format image. The 'Format image' tab has the following sub-sections:

- Search
- Image (selected)
- General
- Style
- Action
 - Action
 - Type: Bookmark
 - Bookmark: showing team details
 - Destination: None
 - Web URL:
- Tooltip

A 'Reset to default' button is located at the bottom right of the ribbon.

Filters tab content:

- Search:
- Filters on this page:
 - Add data fields here
- Filters on all pages:
 - Add data fields here

Selection tab content:

- Layer order
- Tab order
- Show Hide
- Teams Icon (selected)
- Product Table
- Teams Table
- LBS %
- Total Shipments by B...
- Image
- Select Measure
- Sales by Start of Month
- Profit %
- Card (new)
- Shape

Bookmarks tab content:

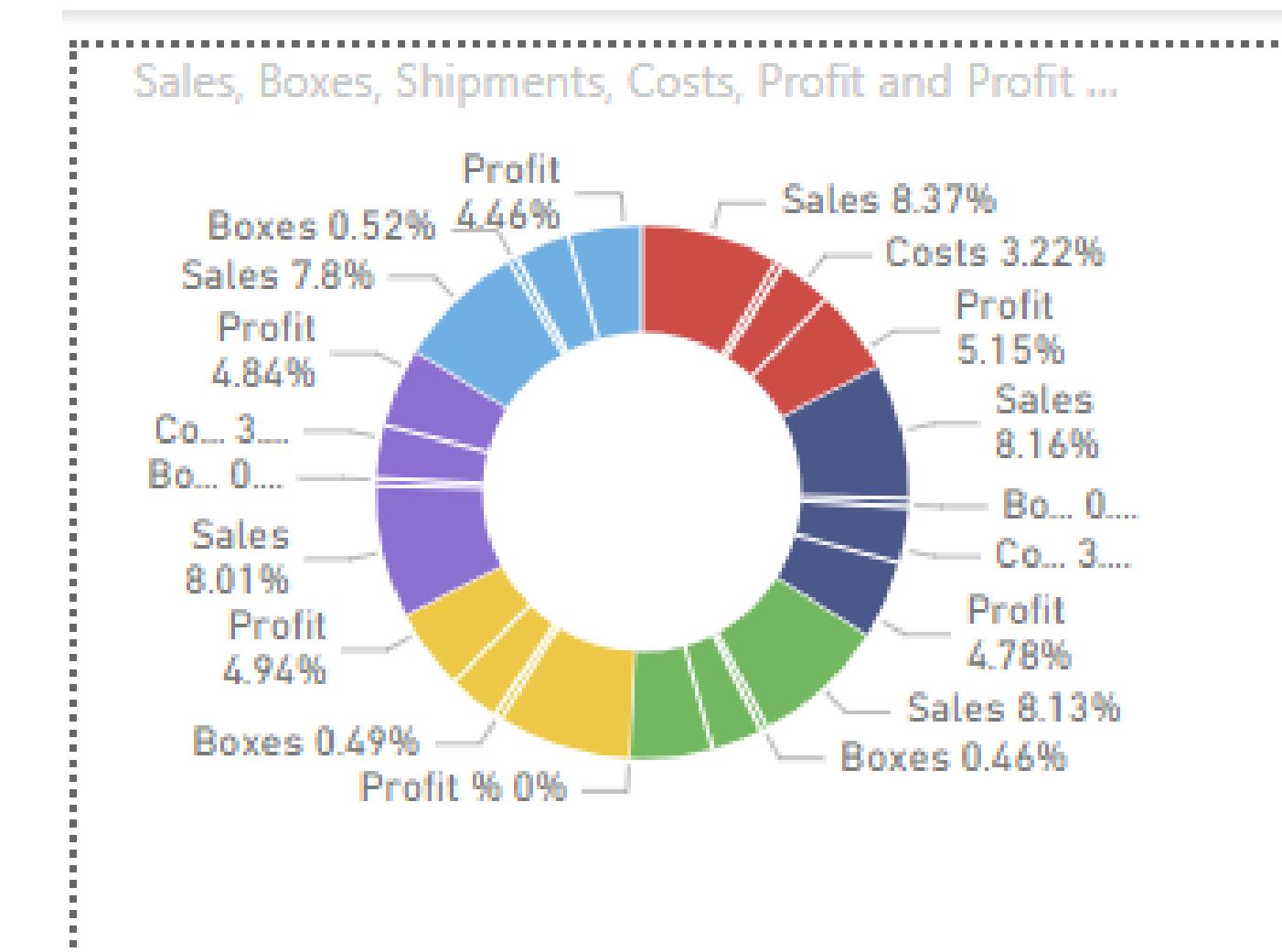
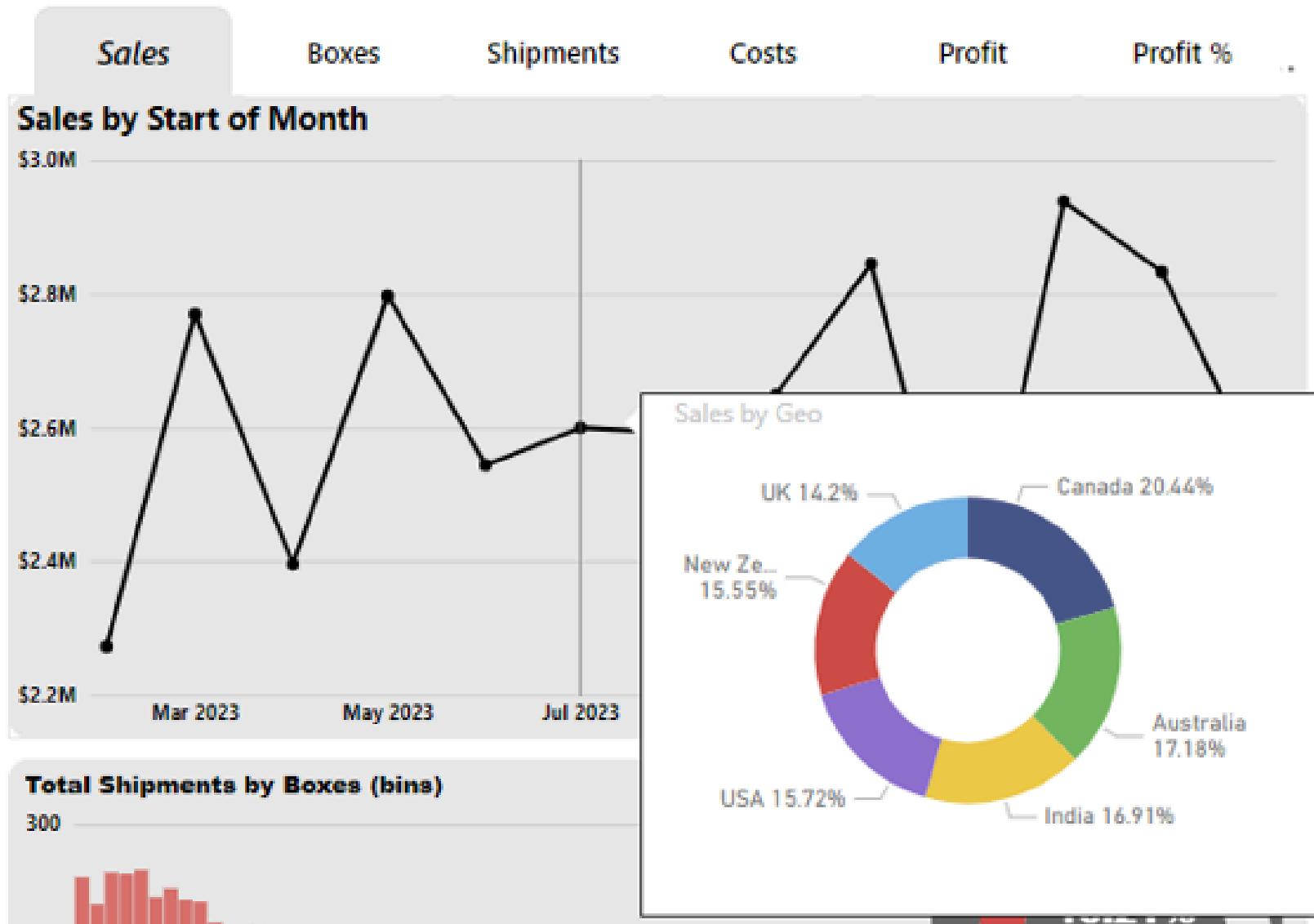
- Add
- View
- showing product data...
- showing team details

Format image tab content:

- Search
- Image (selected)
- General
- Style
- Action
 - Action
 - Type: Bookmark
 - Bookmark: showing team details
 - Destination: None
 - Web URL:
- Tooltip

Reset to default

Tool-tips





Thank You

09 Aug, 2024

