**Finance Analysis Dashboard-Supporting Document**

**Overview**

The **Finance Analysis Dashboard**, created in Power BI, delivers in-depth insights into sales performance across multiple dimensions such as months, salespersons, and teams. This dashboard provides a visual and data-driven way to track actual sales, compare them against set targets, and analyze key metrics like variance and year-to-date (YTD) progress. With interactive elements such as trend lines, bar charts, and status indicators, this dashboard enables stakeholders to make informed decisions quickly and effectively.

**Data Cleaning Process**

To ensure that the dataset used for this dashboard was clean, accurate, and reliable, the following steps were performed during data cleaning and transformation:

* **Unpivot Tables**: Transformed wide-format data into long-format for improved analysis and visualization.
* **Rename Tables**: Adjusted table and column names to facilitate easier identification and consistency.
* **Manage Blank and Duplicated Rows/Columns**: Removed blank entries and eliminated duplicate rows and columns to maintain data integrity.

These steps were critical in creating a consistent and well-structured dataset for meaningful insights.

**Dataset Columns**

The dataset consisted of the following columns, covering essential data for sales analysis:

* **Month**: Represents the time period of the data (e.g., January, February).
* **Sales**: Total sales achieved during a specific month.
* **Sales Person**: The individual responsible for generating the sales.
* **Date**: The specific date associated with the data.
* **Month Name**: The name of the month for easy visualization.
* **Year**: The year of the recorded sales.
* **Picture**: Image or icon representing the salesperson.
* **Team**: The team to which each salesperson belongs.

These columns formed the foundation for the analysis and were transformed into meaningful visualizations.

**Measures Created**

To track sales performance accurately, the following custom measures were created:

* **Months Target Reached**: Tracks the count of months where sales targets were successfully met.
* **Target Status**: Binary indicator (Reached/Not Reached) showing whether sales targets were achieved for each month.
* **Total Sales Actual**: Total sales recorded during the analysis period.
* **Trend Chart Title**: A dynamic title that reflects the sales trend over time.
* **Variance**: The absolute difference between actual sales and target sales.
* **Variance Pct Labels**: Percentage labels highlighting the variance in each period.
* **Variance %**: Percentage difference between actual sales and the target for each period.
* **YTD Sales Actual**: Year-to-date total sales achieved by the organization.
* **YTD Sales Target**: Year-to-date target sales for comparison.
* **YTD Variance**: The difference between YTD actual sales and YTD sales targets.
* **YTD Variance %**: Percentage difference between YTD actual and target sales.
* **Total Sales Target**: Overall sales target for the analysis period.

These custom measures allow the dashboard to provide valuable insights into sales performance and identify areas for improvement.

**Visualizations**

The Finance Analysis Dashboard uses a variety of visual aids to display key metrics clearly and effectively. Below is a sample screenshot of the dashboard:

**Key Visualizations Include:**

1. **Total Sales and YTD Targets**: Displayed prominently in the sidebar to provide a quick overview of key metrics such as total sales actual, total sales target, and variance.
2. **Sales Trend Line**: Shows the sales trend over time, allowing users to identify patterns, peaks, and dips in performance.
3. **Variance and Target Achievement Indicators**: Each salesperson’s performance is tracked and visualized with dynamic indicators (green for overachievement, red for underperformance).
4. **Team & Salesperson Breakdown**: Detailed tables show sales performance on an individual level with actual vs. target comparisons, variance percentages, and trend charts.

**Key Insights**

From the data presented in this dashboard, the following key insights were derived:

* **Total Sales Actual**: $19M
* **YTD Sales**: $2M
* **Total Sales Target**: $19M
* **YTD Target**: $3M
* **Variance from Target**: -$367K, with a **1.9% variance** percentage.
* **Target Achievement**: Only **2 out of 14 months** have met the sales targets, highlighting areas for improvement.

These insights help to direct attention towards underperforming areas, fostering data-driven decisions for future improvements.

**How to Use the Dashboard**

* **Filter by Date**: Use the date filters to analyze monthly or quarterly sales trends.
* **Drill-Down by Salesperson**: Click on individual salespersons to view their specific performance metrics.
* **Analyze Variances**: Evaluate variance percentages to quickly identify over- or underperformance compared to targets.

This interactive dashboard is designed to make data analysis more accessible and actionable, enabling quick assessments and deeper dives into the data.

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**Screenshot**

A preview of the Finance Analysis Dashboard is shown below, highlighting the key sales metrics and the various visualizations used for analysis:

A screenshot of a computer screen

Description automatically generated

**Installation**

To use this Finance Analysis Dashboard:

1. Download the .pbix file.
2. Open it in **Power BI Desktop**.
3. Replace the data source with your own dataset for custom analysis.
4. Modify measures, columns, and visualizations to suit your specific requirements.

**Contributing**

Contributions are welcome! To contribute to this project:

* Report any issues or bugs.
* Suggest new features or improvements.
* Submit pull requests with code changes.

For guidelines, please refer to the **CONTRIBUTING.md** file in the repository.