**Finance Analysis Dashboard**

**Data Cleaning Process**

In this project, the following data cleaning and transformation steps were applied to ensure accuracy and consistency of the dataset:

1. **Unpivot Tables:** Converted wide-format data into a long-format structure to facilitate analysis.
2. **Rename Tables:** Adjusted table names for clarity and easy identification.
3. **Manage Blank and Duplicated Rows/Columns:** Removed any blank or duplicated rows and columns to ensure no redundant or missing data affected analysis results.

**Columns Present in the Dataset:**

* **Month**
* **Sales**
* **Sales Person**
* **Date**
* **Month Name**
* **Year**
* **Picture**
* **Team**

**Measures Created:**

The following measures were implemented to track and visualize key metrics related to sales performance:

* **Months Target Reached:** Shows the number of months where sales targets were met.
* **Target Status:** Visualizes whether a target is reached or missed for each salesperson.
* **Total Sales Actual:** The total actual sales amount.
* **Trend Chart Title:** A dynamic title that reflects the sales trend over time.
* **Variance:** The difference between actual and target sales.
* **Variance Pct Labels:** Percentage label showing variance percentage between actual and target sales.
* **Variance %:** Percentage value showing how far off the target the actual sales are.
* **YTD Sales Actual:** Year-to-date actual sales total.
* **YTD Sales Target:** Year-to-date sales target.
* **YTD Variance:** Year-to-date difference between actual and target sales.
* **YTD Variance %:** Percentage variance of year-to-date actual sales vs. target.
* **Total Sales Target:** Displays the sales target over a period.

**Visualization**

Here’s a snapshot of the dashboard summarizing the performance of the sales team:

**Key Insights:**

* The total sales actual stands at **$19M**, with a year-to-date target of **$3M**.
* The variance from the target is **-$367K**, with a variance percentage of **1.9%**.
* Sales trends and variances are displayed using a combination of bar charts and trend lines, allowing quick identification of underperforming or overperforming salespersons.
* Out of 14 months, sales targets were met for only 2 months, indicating an overall underperformance.

You can now add the image file to the document and update the "path\_to\_image\_placeholder" to the correct image path.

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**You said:**

add other sections in the file like license, screenshot and others which are important

**ChatGPT said:**

ChatGPT

Here's an enhanced version of the **Finance Analysis Dashboard** supporting document with additional important sections like license, screenshots, and more:

**Finance Analysis Dashboard**

**Overview**

This **Finance Analysis Dashboard** in Power BI provides comprehensive insights into sales performance across multiple months, salespersons, and teams. It highlights key metrics such as actual sales, variance from targets, and year-to-date (YTD) analysis with visual aids like trend lines, bar charts, and status indicators for easy interpretation.

**Data Cleaning Process**

The following steps were applied during data cleaning and transformation to ensure accurate and reliable analysis:

1. **Unpivot Tables:** Transformed wide-format data into a long-format structure for better visualization and analysis.
2. **Rename Tables:** Adjusted table names for easier identification.
3. **Manage Blank and Duplicated Rows/Columns:** Removed blank and duplicated rows and columns to maintain data integrity.

**Dataset Columns**

The dataset used in this dashboard included the following columns:

* **Month**
* **Sales**
* **Sales Person**
* **Date**
* **Month Name**
* **Year**
* **Picture**
* **Team**

**Measures Created**

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

* **Months Target Reached**: Count of months where sales targets were met.
* **Target Status**: Binary indicator (Reached/Not Reached) showing target achievement.
* **Total Sales Actual**: The total sales achieved.
* **Trend Chart Title**: A dynamic title reflecting the sales trend over time.
* **Variance**: The difference between actual and target sales.
* **Variance Pct Labels**: Percentage labels showing the variance percentage.
* **Variance %**: The percentage difference from the target.
* **YTD Sales Actual**: Year-to-date actual sales.
* **YTD Sales Target**: Year-to-date target sales.
* **YTD Variance**: Difference between YTD actual and target sales.
* **YTD Variance %**: Percentage difference between YTD actual and target sales.
* **Total Sales Target**: Displays the sales target over a specific period.

**Visualizations**

The dashboard visualizes key sales metrics using charts and tables that are easy to interpret. Below is a sample screenshot of the dashboard:

**Dashboard Screenshot**

The dashboard contains:

* **Total Sales** and **YTD Targets**: Key metrics presented in the sidebar.
* **Trend Line**: Showing the sales trend across months.
* **Variance and Target Achievement**: For each salesperson, represented with dynamic visual indicators.

**Key Insights:**

* Total sales actual: **$19M**, YTD sales: **$2M**.
* Total sales target: **$19M**, YTD target: **$3M**.
* Variance from target: **-$367K**, with a **1.9% variance percentage**.
* Out of 14 months, sales targets were met in only 2 months.

**How to Use the Dashboard**

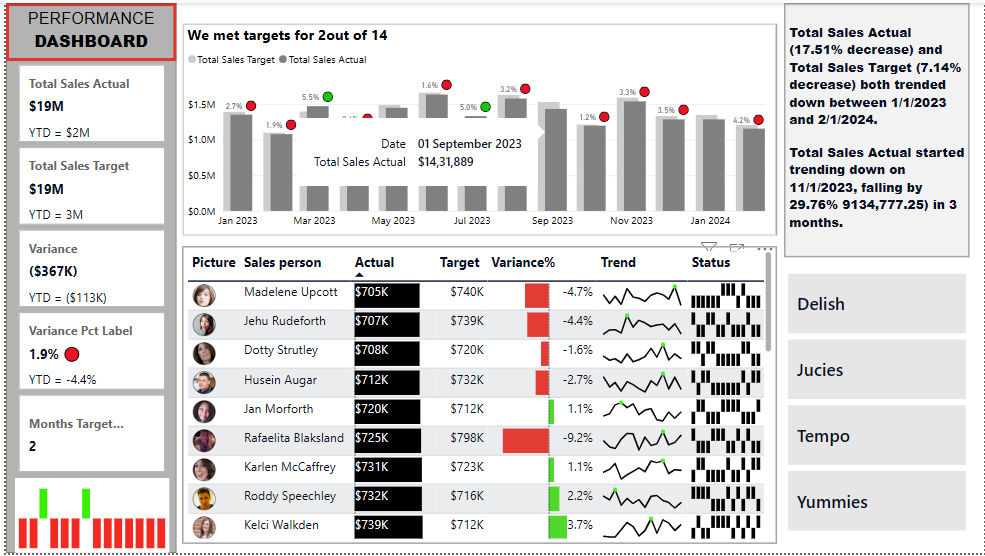
1. **Filter by Date**: Use the date filter to see monthly or quarterly trends.
2. **Drill-Down by Salesperson**: Click on any salesperson to see individual performance metrics.
3. **Analyze Variances**: Check variance percentages to determine overperformance or underperformance against targets.

**License**

This project is licensed under the MIT License - see the LICENSE file for details.

**Screenshot**

A preview of the **Finance Analysis Dashboard**:



**Installation**

To use this dashboard:

1. Download the .pbix file.
2. Open it in Power BI Desktop.
3. Replace the data source with your own data for analysis.
4. Modify measures and columns as needed to suit your requirements.

**Contributing**

Feel free to contribute to the project by creating issues, suggesting features, or submitting pull requests. Make sure to follow the contribution guidelines outlined in the repository.