



The objective of this solution delivery is to model, measure, analyze and track the status of sales within this furniture department store



Report

User Story

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Sales Summary

This page includes high-level summary of YoY sales and gross margin performance trending situation comparing with previous year at each product category, customer segment, time period and region.

Audience: Executives

Dimensions: Hierarchy of Product, Time, Customer Segment, and Region.

KPIs: Sales Amount, Gross Margin Penetration, Cost



Product Detail

This page includes product details. We can learn the most profitable product by each time period, region and customer.

Audience: Operational Department of purchasing, sales and marketing

Dimensions: Hierarchy of Product

KPIs: Gross Margin Penetration, Profit Rate



Customer Detail

This page includes customer details. We can learn the top 20 customers by profit as well as the contribution of each segment to total sales amount.

Audience: CRM and Marketing Campaign Department

Dimensions: Customer Segment

KPIs: Segment Contribution Penetration



Date Type

Order Date Ship Date

Time Hierarchy

Select all

2014 2015

Region

Select all

Central East

Segment

Select all

Consumer Corporate

Product Hierarchy

Select all

Furniture Office Supplies

\$2.30M

Sales Amount

\$1.16M

Consumer Sales

\$2.01M

Cost of Goods

\$286.4...

Gross Margin

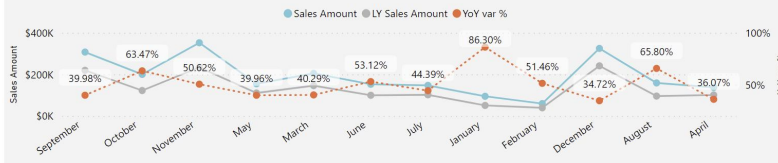
(\$64.23K)

Sales Amount Discounted

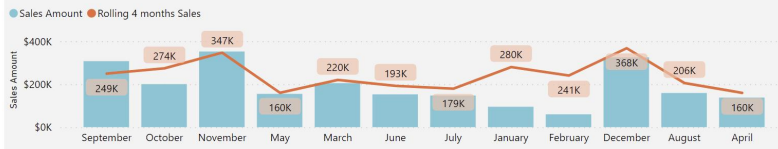
\$180.5K

Amount Returned

YoY Sales Trends by Month



Rolling 4 Months Sales Amount



Product Return - (Threshold: 10%)

Category	Total Orders	Return Rate
Office Supplies	3742	8.01%
Binders	1316	9.34%
Paper	1191	8.75%
Storage	777	6.68%
Art	731	5.53%
Appliances	451	10.41%
Labels	346	6.21%
Envelopes	249	5.52%
Fasteners	215	7.44%
Supplies	187	9.58%
Furniture	1764	8.15%
Furnishings	877	7.77%
Chairs	576	7.51%
Tables	307	10.80%
Bookcases	224	7.60%
Technology	1544	8.13%
Phones	814	8.00%
Accessories	718	7.43%
Machines	112	13.86%
Copiers	68	8.12%
Total	5009	8.06%

Last Refresh (est)

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Date Type

Order Date Ship Date

Time Hierarchy

Select all

2014 2015

Region

Select all

Central East

Segment

Select all

Consumer Corporate

Product Hierarchy

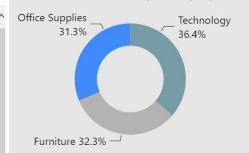
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Furniture Office Supplies

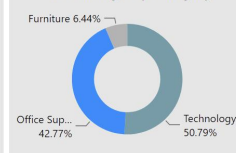
GM(%) by Product

Category	Sales Amount	Gross Margin	GM(%)
Furniture	\$741,999.80	\$18,451.27	2.5%
Bookcases	\$114,880.00	(\$3,472.56)	-3.0%
Chairs	\$328,449.10	\$26,390.17	8.1%
Furnishings	\$91,705.16	\$13,059.14	14.2%
Tables	\$206,965.53	(\$17,725.48)	-8.6%
Office Supplies	\$719,047.03	\$122,490.80	17.0%
Appliances	\$107,532.16	\$18,138.01	16.9%
Art	\$27,118.79	\$6,527.79	24.1%
Binders	\$203,412.73	\$30,221.76	14.9%
Envelopes	\$16,476.40	\$6,964.18	42.3%
Fasteners	\$3,024.28	\$949.52	31.4%
Labels	\$12,486.31	\$5,546.25	44.4%
Paper	\$78,479.21	\$34,053.57	43.4%
Storage	\$223,843.61	\$21,278.83	9.5%
Supplies	\$46,673.54	(\$1,189.10)	-2.5%
Technology	\$836,154.03	\$145,454.95	17.4%
Accessories	\$167,380.32	\$41,936.64	25.1%
Copiers	\$149,528.03	\$55,617.82	37.2%
Machines	\$189,238.63	\$3,384.76	1.8%
Total	\$2,297,200.86	\$286,397.02	12.5%

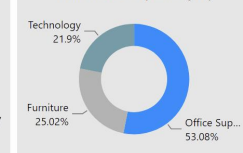
Sales Amount by Category



Gross Margin by Category



Total Orders by Category



Top 5 Product by Gross Margin

Product Name	Gross Margin	Cost of Goods	GM(%)	Profit Rate
Canon imageCLASS 2200 Advanced Copier	\$25,199.93	\$36,399.90	40.9%	69.23%
Canon PC1060 Personal Laser Copier	\$4,570.93	\$7,048.90	39.3%	64.85%
Fellowes PB500 Electric Punch Plastic Comb Binding Machine with Manual Bind	\$7,753.04	\$19,700.35	28.2%	39.35%
Hewlett Packard LaserJet 3310 Copier	\$6,983.88	\$11,855.80	37.1%	58.91%
Logitech G19 Programmable Gaming Keyboard	\$4,425.34	\$9,331.19	32.2%	47.43%

Sales Amount by Sub-Category

Phones	Tables	Binders	Machines
\$330.01K	\$206.97K	\$203.41K	\$189.24K
Chairs	Accessories	Appli...	Furn...
\$328.45K	\$167.38K	\$107.5...	\$91...
Storage	Copiers	Paper	Art
\$223.84K	\$149.53K	\$78.48K	
	Bookcases	Supplies	
	\$114.88K		

Last Refresh (est)

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Date Type

Order Date

Ship Date

Time Hierarchy

Select all

2014

2015

Region

Select all

Central

East

Segment

Select all

Consumer

Corporate

Product Hierarchy

Select all

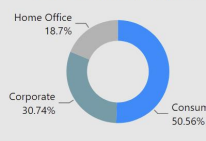
Furniture

Office Supplies

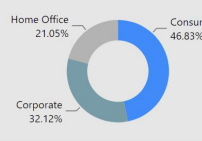
Top 20 Customers by Gross Margin

Customer Name	Sales Amount	Gross Margin	GM(%)
Tamara Chand	\$19,052.22	\$8,981.32	47.1%
Raymond Buch	\$15,117.34	\$6,976.10	46.1%
Sanjit Chand	\$14,142.33	\$5,757.41	40.7%
Hunter Lopez	\$12,873.30	\$5,622.43	43.7%
Adrian Barton	\$14,473.57	\$5,444.81	37.6%
Tom Ashbrook	\$14,595.62	\$4,703.79	32.2%
Christopher Martinez	\$8,954.02	\$3,899.89	43.6%
Keith Dawkins	\$8,181.26	\$3,038.63	37.1%
Andy Reiter	\$6,608.45	\$2,884.62	43.7%
Daniel Raglin	\$8,350.87	\$2,869.08	34.4%
Tom	\$9,133.99	\$2,798.37	30.6%
Boeckenhauer			
Nathan Mautz	\$6,459.34	\$2,751.68	42.6%
Sanjit Engle	\$12,209.44	\$2,650.68	21.7%
Bill Shonely	\$10,501.65	\$2,616.06	24.9%
Harry Marie	\$8,236.76	\$2,437.98	29.6%
Todd Sumrall	\$11,891.75	\$2,371.71	19.9%
Brian Moss	\$7,294.19	\$2,199.28	30.2%
Christopher Conant	\$12,129.07	\$2,177.05	17.9%
Jane Waco	\$7,721.71	\$2,173.71	28.2%
Helen Wasserman	\$9,300.25	\$2,164.16	23.3%
Total	\$217,227.14	\$74,518.76	34.3%

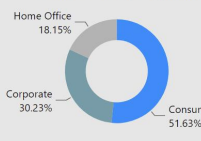
Sales Amount by Segment



Gross Margin by Segment



Total Orders by Segment



Segment Sales Contribution Trends by Month



Sales Amount

\$2.30M

Selected Segment Sales

\$2.3M

Segment Sales Contribution

100.0%

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The menu page will be showing the analysis consideration of this dashboard and also showing the principle of creating dashboard,

Design Consideration (Assumptions)

- 1> SCD: Product
- 2> Postcode as Primary Key in Region hierarchy
- 3> Data Security, Region manager should see specific regional KPIs based on their logins

Technical Challenges (Highlights)

- 1> Parameterized environmental variables for future deployment
- 2> Parameterized Time table in M code for general and fiscal calendars
- 3> M code to address latest refresh time
- 4> Created functions for various purposes

Business Insights (Recommendations)

- 1> Profit Rate is very useful for product purchasing and pricing strategy
- 2> By analyzing customers shopping habit and their GM (%), CRM team can easily plan campaign targeted specific customers
- 3> Return Rate is a useful KPI for product team to make product plan