

Power Query Advanced

Takeaways

- **Customer:** A direct buyer, from a store or distributor, who purchases products.
- **Retailer:** A business that buys products and sells them to end consumers, through **Brick & mortar stores** (physical stores like Best Buy and Croma) or **E-commerce platforms** (online stores like Flipkart and Amazon).
- **Direct Seller:** Someone who sells products directly to consumers, without intermediaries.
- **Distributor:** A business that buys products in bulk and sells them to retailers or other businesses.

Business Insights Project

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RP

Nick Puri

► 12:18 PM • ○ INBOX

↶ ↷ ↸ ↹

○ Stephen Singh



Stephen,

Providing you more details of the 'Business Insight 360 Dashboard' project that we need to deploy globally. I'm also attaching the preliminary list of features for review.

This project is expected to improve the transparency and enable data driven decision-making across markets & functions and therefore deliver a quantitative benefit of 10% incremental Profit.

As you know this project has been reviewed by our CEO and he has a keen interest in getting this live by the end of Q2.

I will gladly fill the role of product owner to represent the business owner and would like to know with whom I should get in touch from your team to get this moving forward.

Thank you,
Nick

Features	Description
Finance View	Show Profit and loss statement to understand financial performance across Markets, Products, Customers etc.
Sales View	Show Top / Bottom Customers along with Key Metrics. A matrix would be preferable to understand their performance
Marketing View	Same as Sales view but for Products
Supply Chain	Reliability, Forecast Accuracy in a view to understand SC Performance
Executive View	Integrated view of key insights for executives. (More details TBD)

Fwd: Business Insights

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Stephen Singh

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②

Tony Sharma



Tony,

Please find the attached details of the project we discussed earlier. Feel free to schedule a call with PO to scope and plan it further.

Thank you,

Stephen Singh,
Analytics Director, AtliQ

Fwd: Business Insights

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RP

Tony Sharma

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Nick Puri



Nick,

I'm glad to be a part of this project and looking forward to working with you. Sending you this kickoff meeting invite.

I have reviewed the tool features and will check the data availability / feasibility for the same before our kickoff.

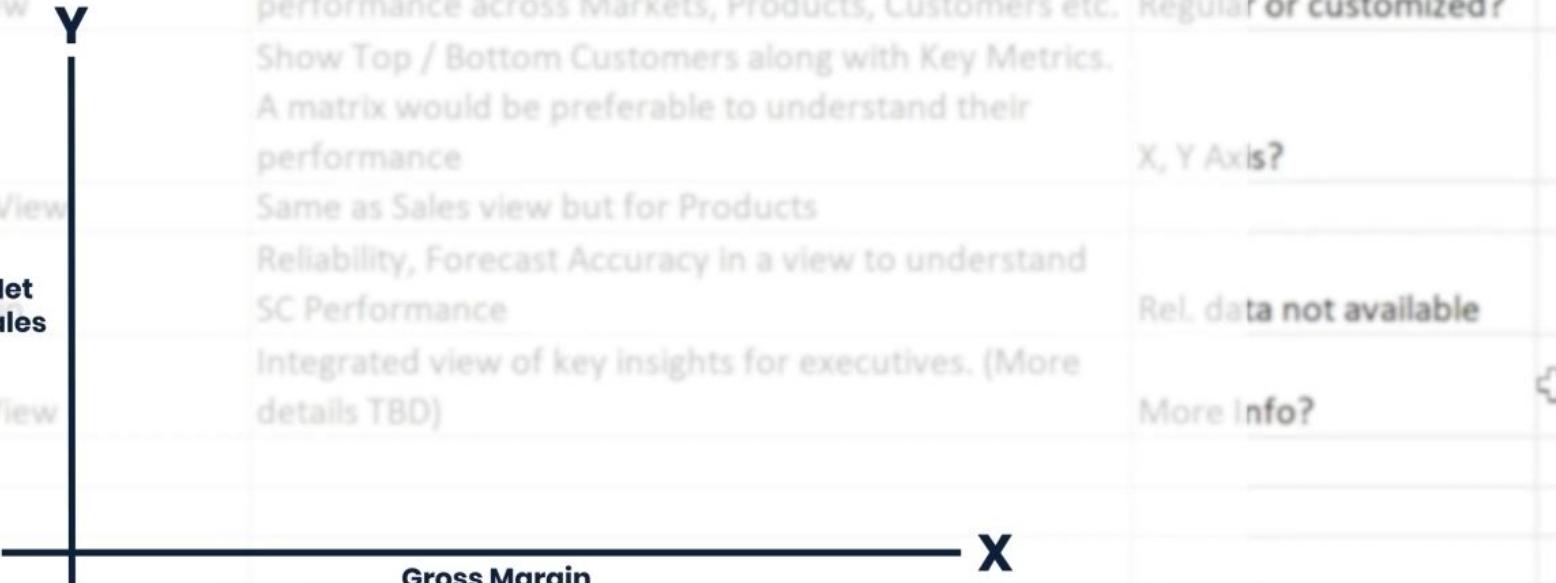
Also preparing the project charter with available details, happy to discuss it in our call.

Thank you,

Tony Sharma,
Senior Data Analyst

	A	B	C
1	Features	Description	Comments
2	Finance View	Show Profit and loss statement to understand financial performance across Markets, Products, Customers etc.	Regular or customized?
3	Sales View	Show Top / Bottom Customers along with Key Metrics. A matrix would be preferable to understand their performance	X, Y Axis?
4	Marketing View	Same as Sales view but for Products	
5	Supply Chain	Reliability, Forecast Accuracy in a view to understand SC Performance	Rel. data not available
6	Executive View	Integrated view of key insights for executives. (More details TBD)	More Info?
7			
8			

A	B	C
Features	Description	Comments
Finance View	Show Profit and loss statement to understand financial performance across Markets, Products, Customers etc. Show Top / Bottom Customers along with Key Metrics. A matrix would be preferable to understand their performance	Regular or customized?
Sales View		X, Y Axis?
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Executive View	Integrated view of key insights for executives. (More details TBD)	More Info?



Management and Relationships for Project



the users
the users
Difficulty: Beginner

hen you are project and want to understand the responsibilities, and contributors. Save this a brief and about the project.

What We Know So Far
Desired Capabilities
Team Agreements

Meeting

1 | What We Know So Far

Project Name

Global Business Insights 360

Background Information

Attilo wants to make data driven decision making as a part of their work culture and taking their first big step towards that by embedding a Power BI tool in the organization

Helpful Links

Link in anything that would help project members get up to speed on the project.

Key Players

Product Owner
Nick Puri
Business Development Director

Executive Sponsor
Stan Korn
CEO

D & A Lead
Tony Sharma
Senior Data Analyst

IT Lead
Jasve Singh
Data Engineer

2 | Objective

Enable quick insights for business across markets and data driven decision making.
Enable 'Start the day with analysis'

3 | Hopes & Fears

10 min

Hopes



Fears



3 | Project Goals

10 min

Who

Executives, Finance, Supply Chain, Sales & Marketing teams

What

Enable insights and enable data driven decision making

When/Where

Q3 every 2020

Why

Cost reduction

4 | Defining Success

15 min

Future Headlines

Imagine the project is done and it's a Huge success. Write down the headlines that summarize why this was such a big success.



Create Measurable Success Metrics

When can we call this project a success?
10% increase in Profit Margin
20% increase in Revenue
Attendance to be reduced from 20% to 40%

5 | Team Core & Desired Capabilities

10 min

Person

Core Capability

Desired Capability

6 | Collaboration Agreements

4

10 min

Weekly meeting with PO

BI Weekly update on milestones

7 | Risks

10 min

What could derail this project or this milestone?



WRAP UP

Key Takeaways & Observations



Share your feedback

Takeaways

- A **Fiscal year** is a 12-month period used by businesses and organizations for financial reporting and budgeting, which may start and end on dates different from the calendar year.
- **Profit and loss** refers to the financial statement showing a company's revenues, expenses, and net profit or loss over a specific period.
- **Gross margin** is our actual profit after subtracting all expenses from net sales.

Takeaways

- **A Data warehouse** is a place where large amounts of data from different sources are stored, so it can be easily used for reports and analysis.
- **OLTP (Online Transaction Processing)** is a system used to manage fast and frequent transactions, like making purchases or updating records in real time.
- **OLAP (Online Analytical Processing)** is a system that helps users analyze large amounts of data to find patterns, trends, and insights for better decision-making.
- **A Data Catalog** is a tool that helps you find and understand all the data and databases available in your organization.

Takeaways

- A **Dimension table** is a database table that contains descriptive information about the entities being analyzed, such as products or customers.
- A **Fact table** is a database table that stores all the quantitative data, like sales or transactions, and links to the descriptive information in the dimension tables for analysis.
- A **Star schema** is a type of database schema where a central fact table is connected to multiple dimension tables, resembling a star shape, to organize and simplify data for efficient querying and analysis.
- **Distinct** refers to a unique or different item or value, ensuring no duplicates within a set or collection.



General

Posts Files Wiki

BI 360



Meet



Group by Bucket

Filter



List

Board

Charts

Schedule

To do

+ Add task

Data Collection & Initial validation

+ Add task

Transforming data

+ Add task

Add new buck

- Collect the data from data catalog
- Check the data catalog and collect data base

0/1



Peter Pandey

Total Forecast Qty
2022 : 86,823,484
Products Sold
FY 2022 : 346
Active Customers
FY 2022 : 219
Active Markets
FY 2022 : 27

- Ensure there are no gaps in database vs Benchmark numbers

Benchmark Numbers.docx

! 1 0/3



Peter Pandey



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	A	B	C	D
1	DB Server	TableName	Description	Contact
2	GDB041	FactForecastMonthly	Contains historical forecast, current forecast at monthly level	Jarvis Singh
3	GDB041	FactSalesMonthly	Contains sales up to date at Monthly level	Jarvis Singh
4	GDB013	Regional Forecast	Forecast at different levels of granularity as per region	Loki Lal
5	GDB014	Regional Sales	Sales at different levels of granularity as per region	Loki Lal
6	GDB056	ManufacturingCost	Currency in USD, data at fiscal year level	Jarvis Singh
7	GDB056	PostInvoiceDeductions	Currency in USD, data at monthly level	Jarvis Singh
8	GDB017	Regional Cost & Deductions	Local Currency	Loki Lal
9	GDB056	PreInvoiceDeductions	Currency in USD, data at fiscal year level	Jarvis Singh
10	GDB019	RegionalMarkUpCost	Local Currency	Loki Lal
11	GDB020	RegionalOperatingExpenses	Local Currency	Loki Lal
12	GDB041	DimCustomer, DimProduct, DimMarket		Loki Lal
13	GDB022	Regional Freight	Local Currency	Loki Lal
14	GDB056	FreightCost	'Freight' and 'other costs' is % of Net Sales	Jarvis Singh
15				
16	GDB024	DailySales	Contains sales at daily level	Loki Lal
17	GDB056	GrossPrice	Currency in USD, data at fiscal year level	Jarvis Singh
18				
19				

Numbers provided by PO as Benchmark to be cross checked against data from MYSQL database. All Years are in fiscal years.

Total Forecast Qty

2022 86.82346M

Products Sold

FY 2022 - 345

Active Customers

FY 2022 - 209

Active Markets

FY 2022 - 27

Total Sales Qty

2018 3.45415M

2019 10.78465M

2020 20.7734M

2021 50.16472M

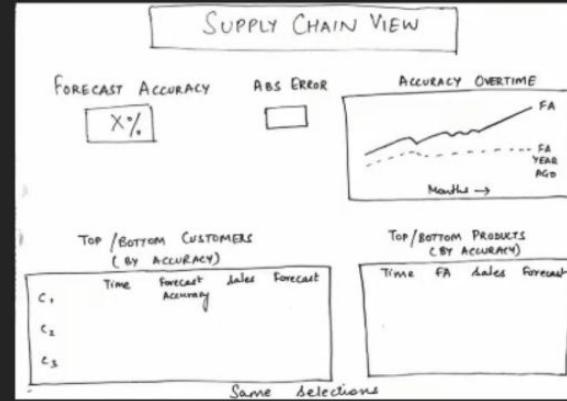
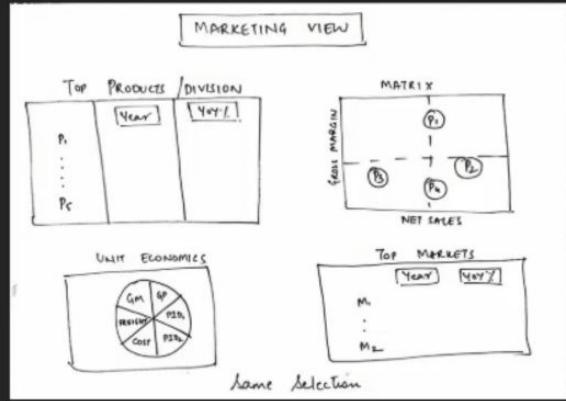
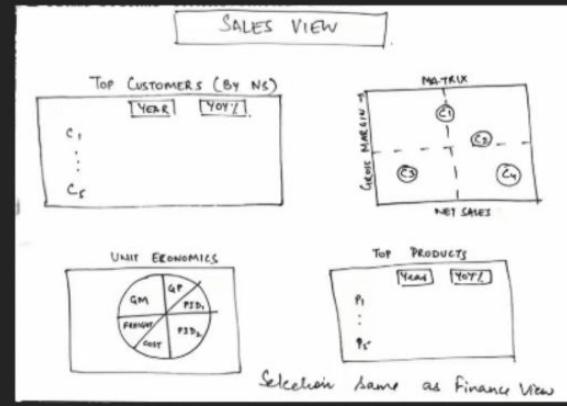
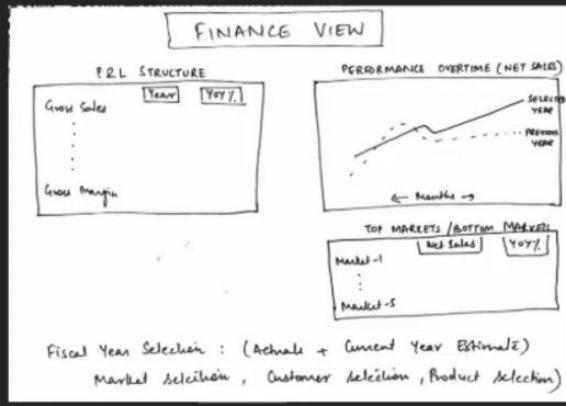
Nick Puri 1/8 12:10 PM



Got it. Will respond by EOD tomorrow

Nick Puri 2:21 AM

Team, attaching the rough sketch and benchmark numbers.

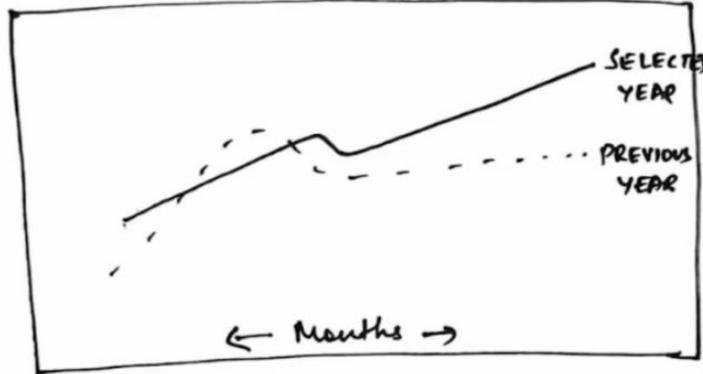


FINANCE VIEW

P&L STRUCTURE

	Year	YoY %
Gross Sales		
:		
:		
Gross Margin		

PERFORMANCE OVERTIME (NET SALES)



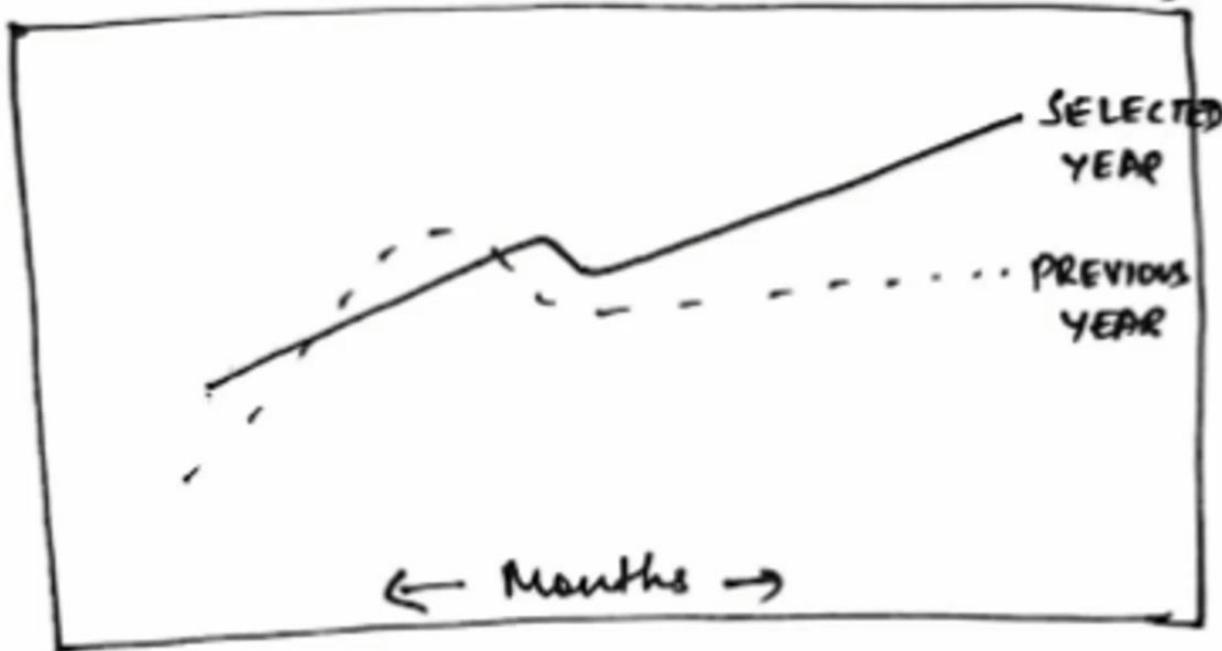
TOP MARKETS / BOTTOM MARKETS

	Net Sales	YoY %
Market -1		
:		
Market -5		

Fiscal Year Selection : (Actuals + Current Year Estimate)

Market Selection , Customer Selection , Product Selection)

PERFORMANCE OVERTIME (NET SALES)



Fiscal Year

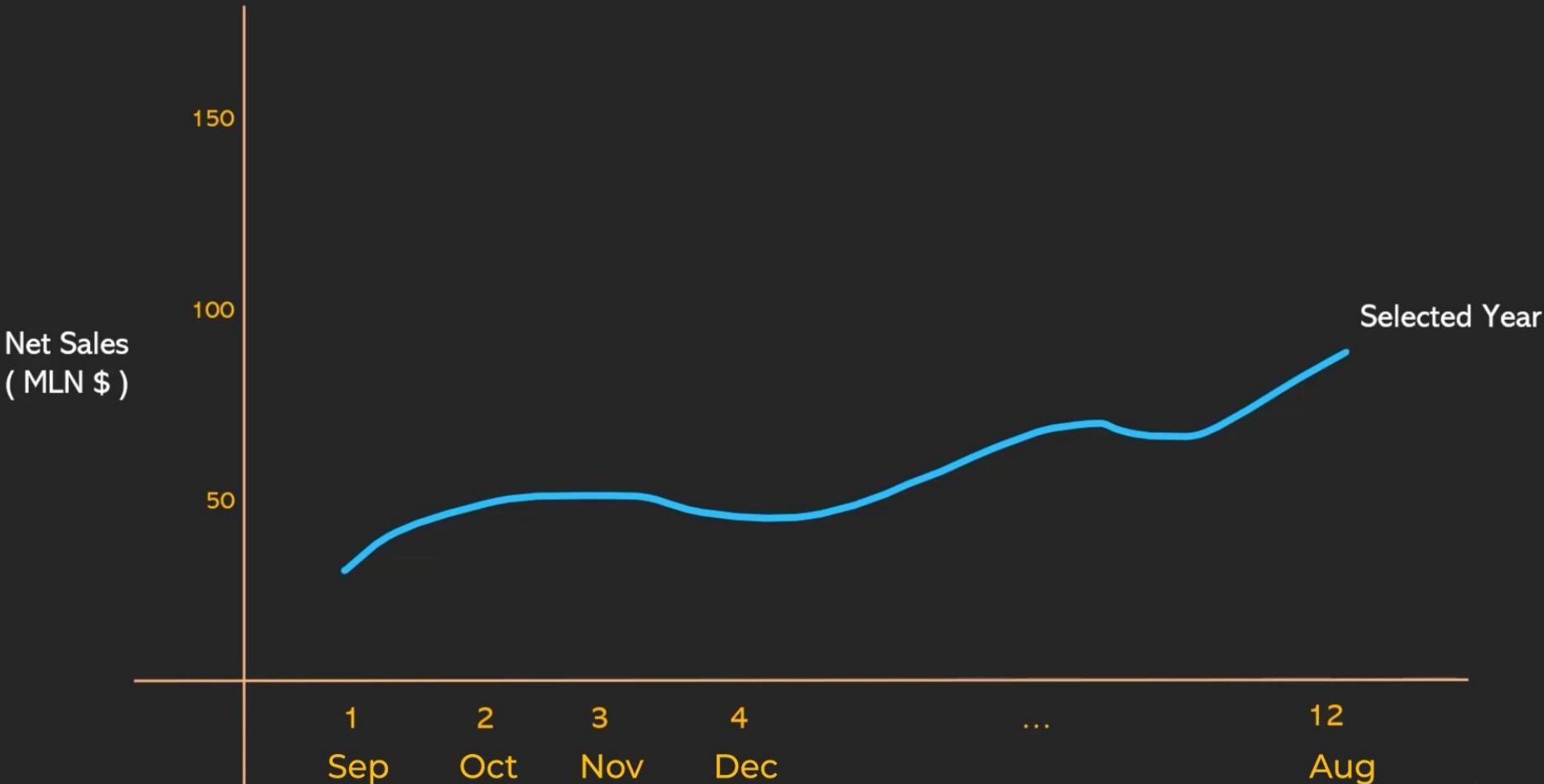
2018

2019

2020

2021

2022



Fiscal Year

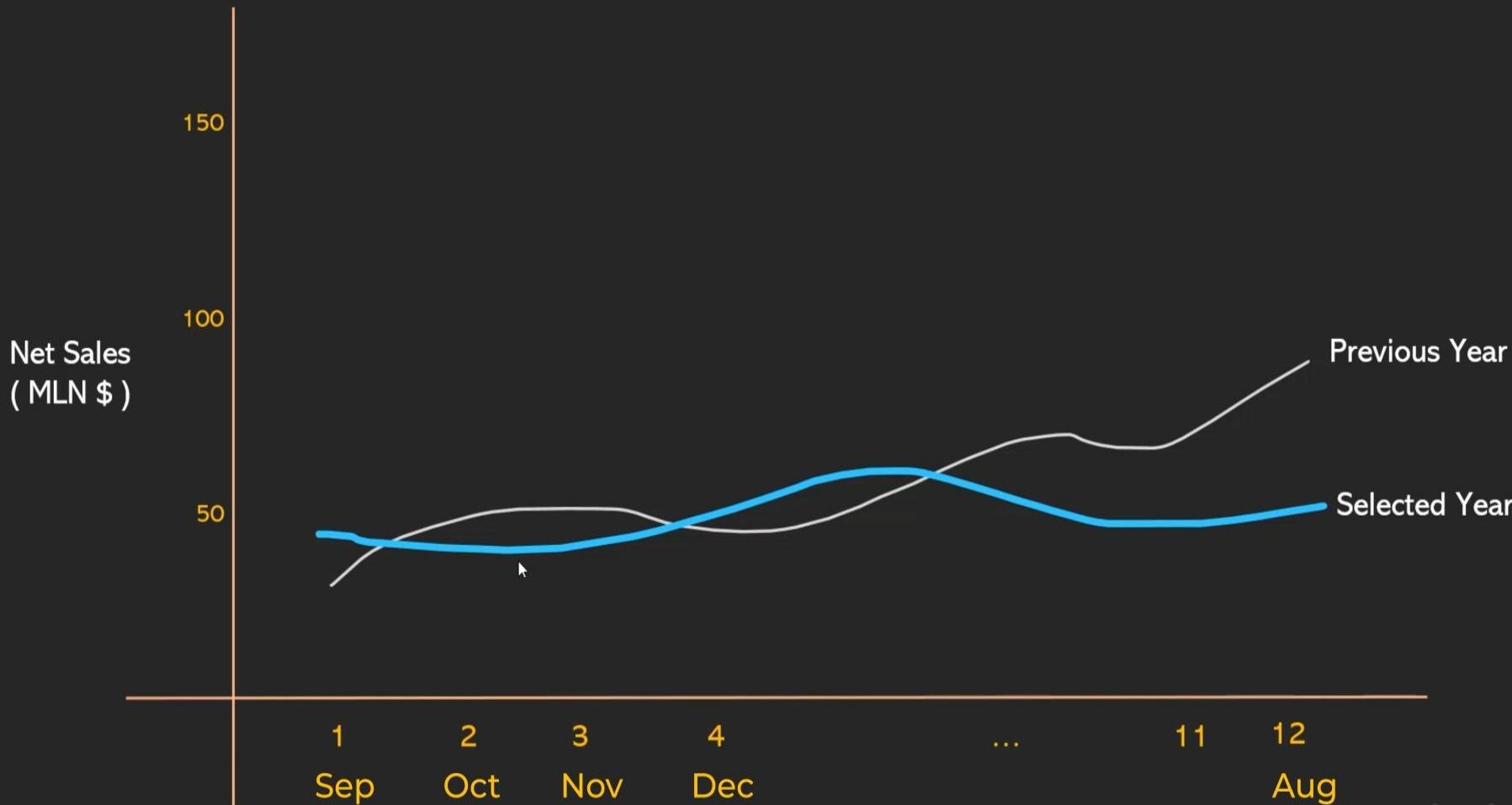
2018

2019

2020

2021

2022



Fiscal Year

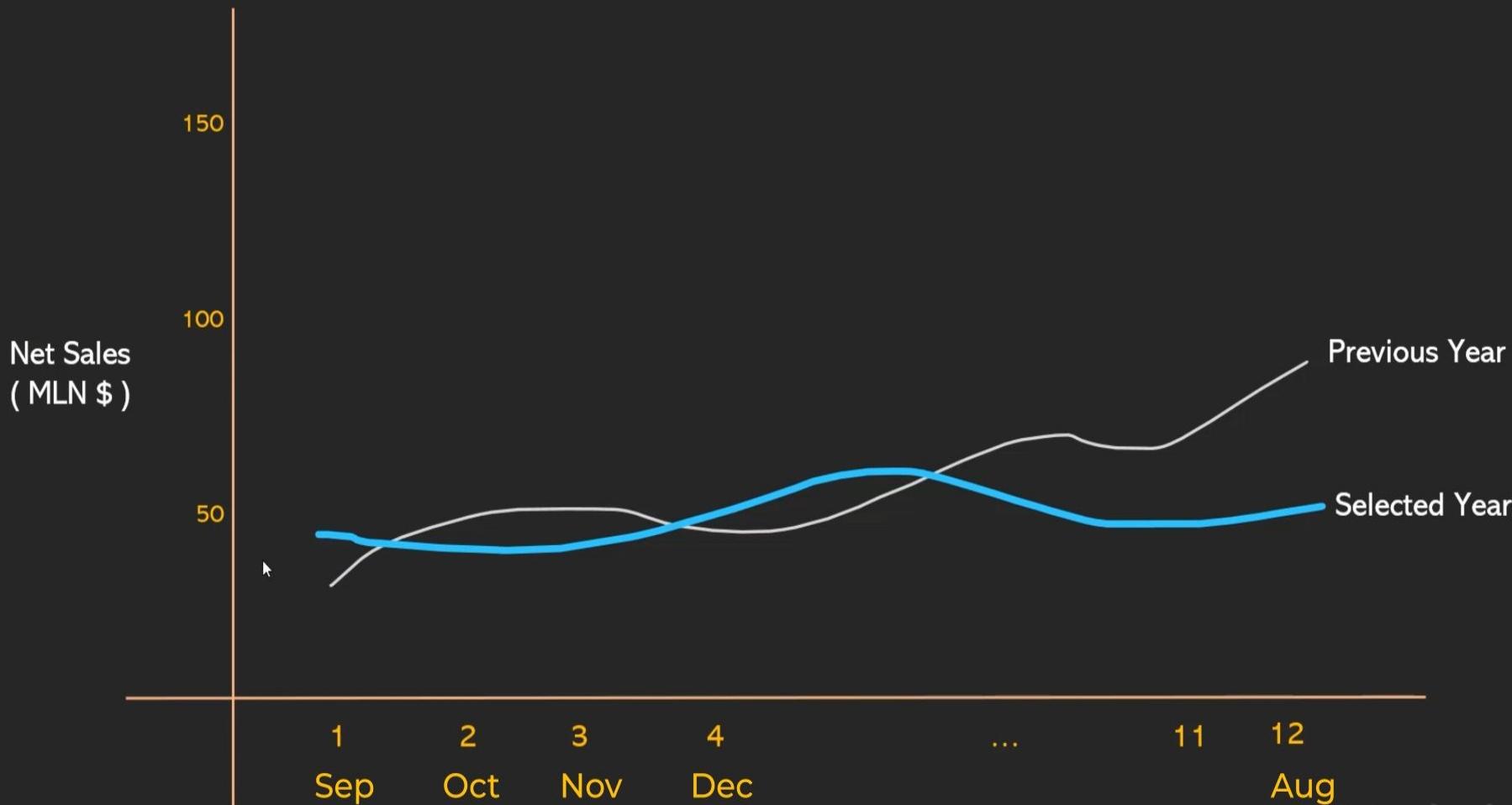
2018

2019

2020

2021

2022



Fiscal Year

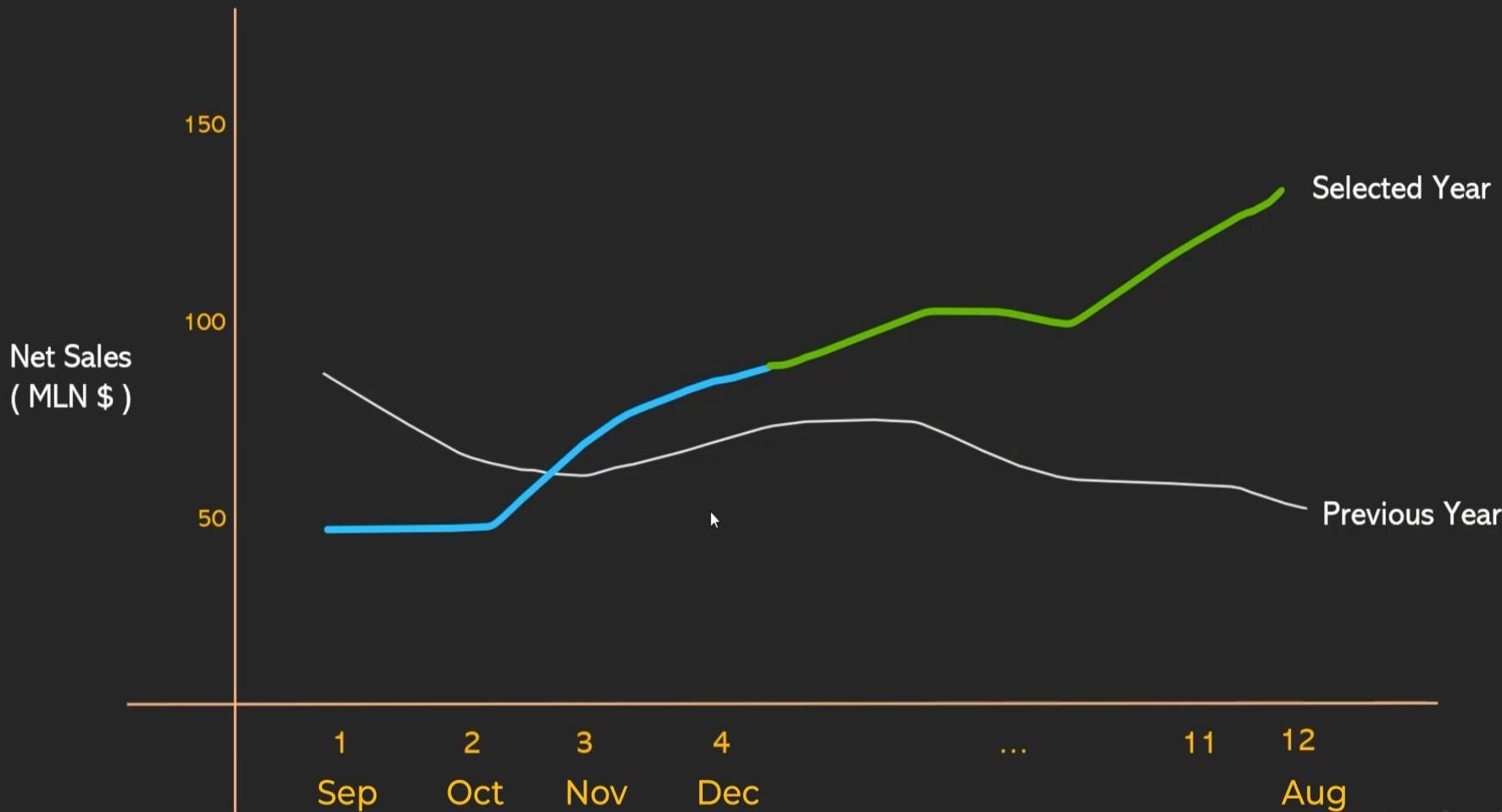
2018

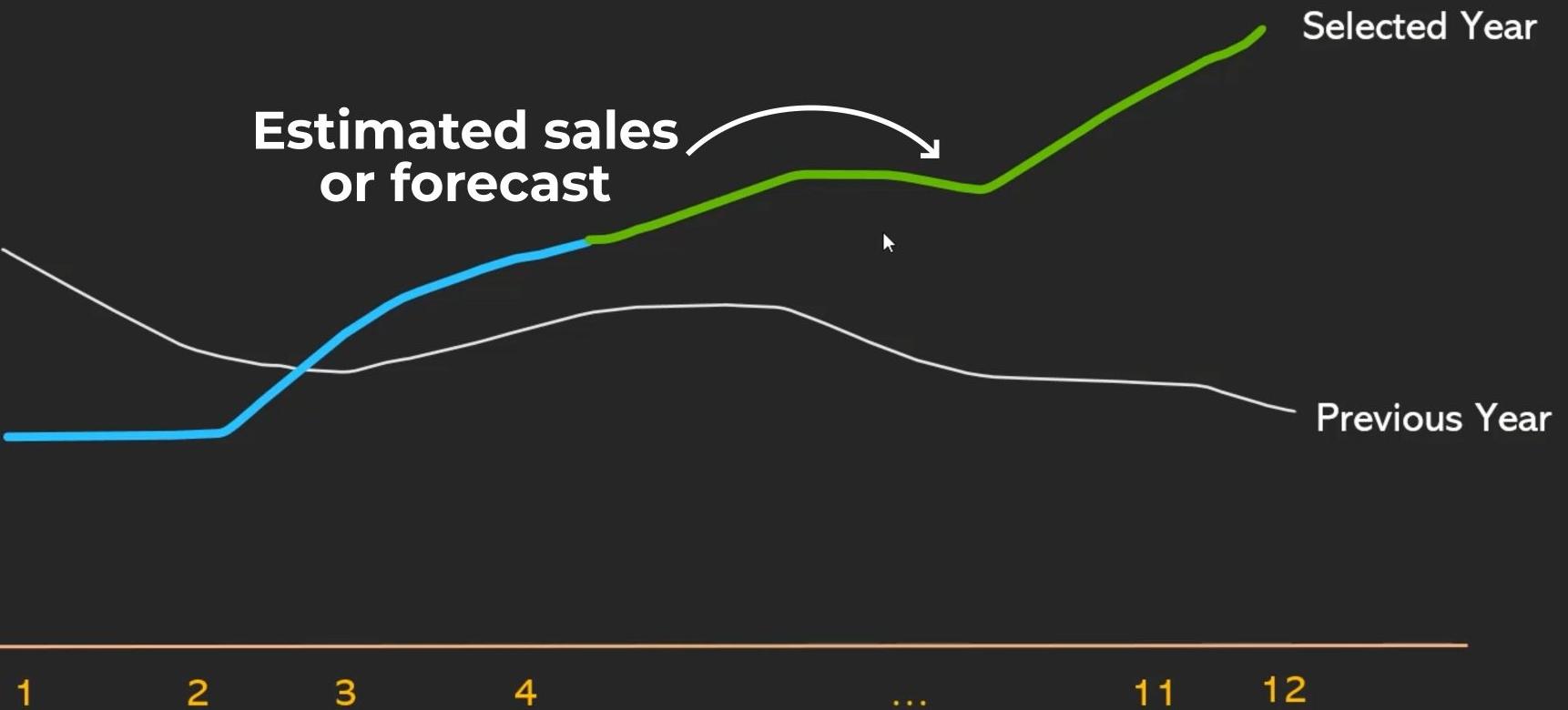
2019

2020

2021

2022





A	B	C	D	E	F	G
		Actuals	Forecast			
Sep-21			39			
Oct-21			61			
Nov-21			54			
Dec-21			20		current month = Aug-21	
Jan-22			43			
Feb-22			74			
Mar-22			63			
Apr-22			50			
May-22			75			
Jun-22			61			
Jul-22			17			
Aug-22			27			
			584			
1						
2						
3						
4						
5						
6						
7						
8						

Search the Avenue (Alt+F)

fx

A	B	C	D	E	F	G	H
		Actuals	Forecast		ForecastActuals		
Sep-21		22	39		Sep-21		
Oct-21		56	61		Oct-21		
Nov-21		34	54		Nov-21		
Dec-21		54	20		Dec-21		
Jan-22	Current Month		43		Jan-22		
Feb-22			74		Feb-22		
Mar-22			63		Mar-22		
Apr-22			50		Apr-22		
May-22			75		May-22		
Jun-22			61		Jun-22		
Jul-22			17		Jul-22		
Aug-22			27		Aug-22		
			584				

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C19

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	A	B	C	D	E	F	G
1			Actuals	Forecast		Forecast	Actuals
2	Sep-21		22	39		Sep-21	
3	Oct-21		56	61		Oct-21	
4	Nov-21		34	54		Nov-21	
5	Dec-21		54	20		Dec-21	
6	Jan-22	Current Month			43	Jan-22	
7	Feb-22				74	Feb-22	
8	Mar-22				63	Mar-22	
9	Apr-22				50	Apr-22	
10	May-22				75	May-22	
11	Jun-22				61	Jun-22	
12	Jul-22				17	Jul-22	
13	Aug-22				27	Aug-22	
14					584		
15							
16							
17	YTD - Year To Date		166				
18	YTG - Year To Go		410				
19				576			
20							







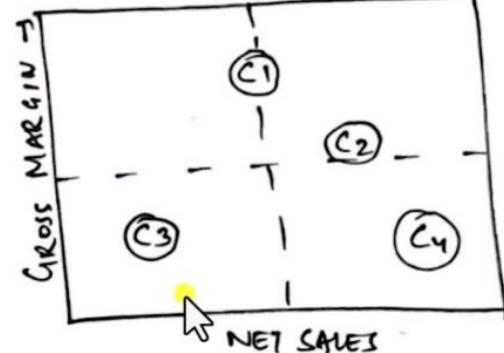
SALES VIEW

TOP CUSTOMERS (By NS)

YEAR	YOY %
------	-------

C₁
:
C₅

MATRIX



UNIT ECONOMICS



TOP PRODUCTS

Year	YOY %
------	-------

P₁
:
P₅

Selection same as Finance View

region, market	customer	segment, category, produ...	2019	2020	2021	2022 Est	Q1	Q2	Q3	Q4
All	All	All								

Customer Performance

customer	NS \$	GM \$	GM %
Amazon	\$496.88M	182.77M	36.78%
AtliQ Exclusive	\$361.12M	166.15M	46.01%
Atliq e Store	\$304.10M	112.15M	36.88%
Flipkart	\$138.49M	58.37M	42.14%
Sage	\$127.86M	40.31M	31.53%
Leader	\$117.32M	36.02M	30.70%
Neptune	\$105.69M	49.36M	46.70%
Ebay	\$91.60M	33.06M	36.09%
Acclaimed Stores	\$73.36M	29.58M	40.32%
walmart	\$72.41M	33.06M	45.66%
Electricalslytical	\$68.05M	25.34M	37.24%
Electricalsocity	\$67.76M	24.41M	36.03%
Staples	\$64.20M	24.99M	38.92%
Costco	\$61.01M	24.15M	39.07%
Total	\$3,736.17M	1,422.88M	38.08%

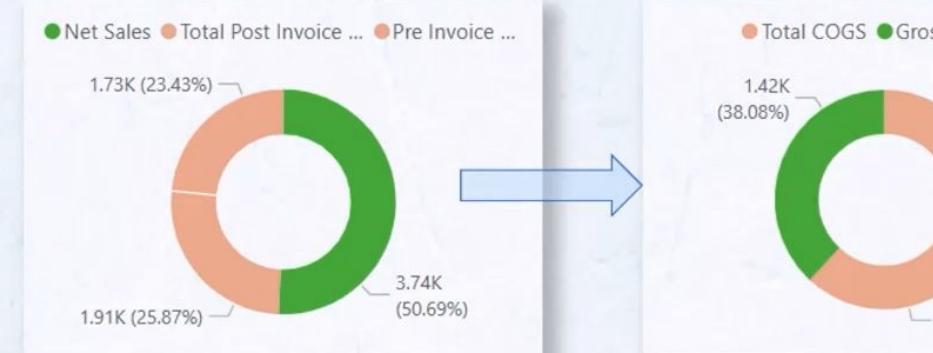
Performance Matrix



Product Performance

segment	NS \$	GM \$	GM %
Networking	\$38.43M	14.78M	38.45%
Storage	\$54.59M	20.93M	38.33%
Desktop	\$711.08M	272.39M	38.31%
Notebook	\$1,580.43M	600.96M	38.03%
Peripherals	\$897.54M	341.22M	38.02%
Accessories	\$454.10M	172.61M	38.01%
Total	\$3,736.17M	1,422.88M	38.08%

Unit Economics



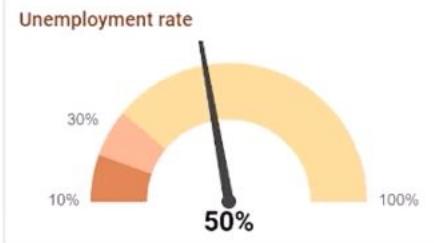
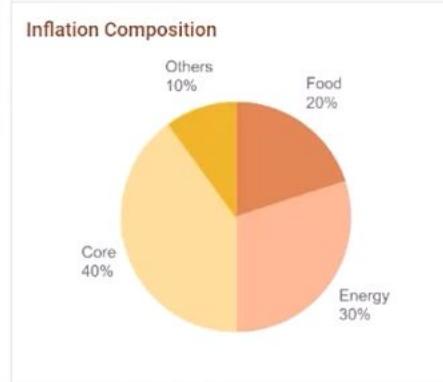
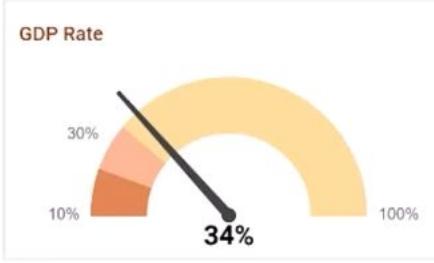
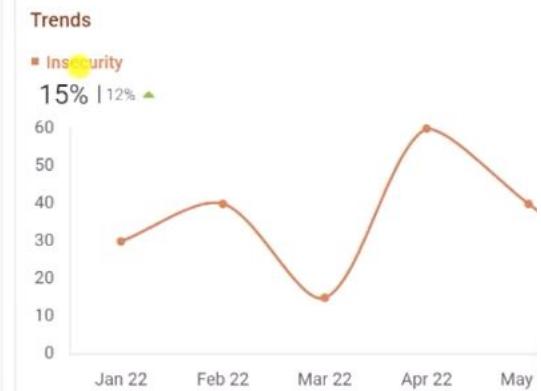
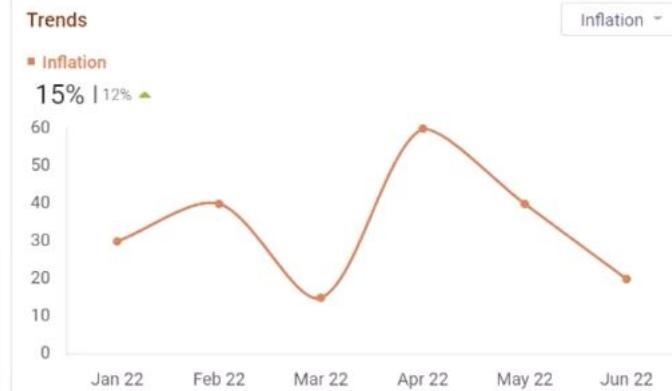
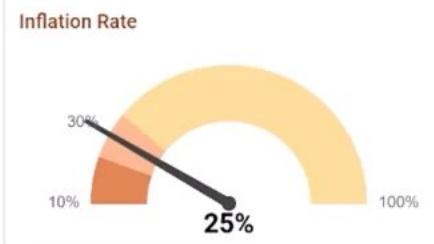


Overall insecurity index
25.2
vs prev 11.6 (+10%)

Political Stability
11.6
vs prev 25.2 (-10%)

Avg Score of Social Indicator
25
vs prev 11 (+10%)

Avg Score of E Sustainability
25
vs prev 11



FINANCE VIEW

P&L STRUCTURE

Gross Sales

Year

YoY %

:

:

:

Gross Margin

PERFORMANCE OVERTIME (NET SALES)

SELECTED
YEAR

PREVIOUS
YEAR

← Months →

TOP MARKETS / BOTTOM MARKETS

Net Sales

YoY %



Gross Price: 30 \$

- Pre-invoice Deduction: 2

= Net Invoice Sales: 28

- Post-invoice Deductions: 3

= Net Sales: 25

- Cost Of Goods Sold (COGS): 20

= Gross Margin: 5

Gross Margin % of Net Sales (GM/NS): 20 %

cromā
The Electronics Megastore



Gross Price: 30 \$ ← FY 2019

Gross Price: 32 \$ ← FY 2020

Gross Price: 31.5 \$ ← FY 2021

product_code: A6219354



Gross Price: 30 \$ ← FY 2019

product_code: A6219354



Gross Price: $30 \times 3 = 90$ \$ ← FY 2019



Qty: 3

Gross Price = Qty * Price of a product in specific fiscal year