

SALES REPORT POWER BI

VISUALIZATION

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Case Study : Sales Report

This sales report document provides insights into the sales data based on different payment modes, including online and offline transactions. The report focuses on analyzing sales data from direct sales, online sales, and wholesale transactions. Additionally, it includes information about the sales by year and month. The report is created using Power BI and covers the following topics:

- Importing data to Power BI in Excel format.
- Editing data in Power Query.
- Creating new columns and measures.
- Creating visuals.
- Formatting dashboard visuals.

Importing Excel data to Power BI

Sales Report - Suji - Power BI Desktop

File Home Help **Table tools**

Name InputData

Mark as date table
Manage relationships
New measure
Quick measure
New column
New table

Structure

Calendars Relationships Calculations

DATE	PRODUCT ID	QUANTITY	SALE TYPE	PAYMENT MODE	DISCOUNT %
Tuesday, January 19, 2021	P0035	6	Direct Sales	Cash	0
Monday, January 25, 2021	P0035	7	Direct Sales	Online	0
Saturday, February 6, 2021	P0035	1	Direct Sales	Cash	0
Saturday, January 9, 2021	P0031	1	Direct Sales	Cash	0
Monday, January 25, 2021	P0031	14	Direct Sales	Online	0
Wednesday, January 20, 2021	P0034	4	Direct Sales	Cash	0
Monday, January 25, 2021	P0034	6	Direct Sales	Cash	0
Tuesday, February 9, 2021	P0034	14	Direct Sales	Online	0
Monday, February 15, 2021	P0027	4	Direct Sales	Online	0
Thursday, January 28, 2021	P0029	2	Direct Sales	Cash	0
Thursday, February 25, 2021	P0030	2	Direct Sales	Online	0
Thursday, March 25, 2021	P0029	8	Direct Sales	Cash	0
Saturday, March 27, 2021	P0030	3	Direct Sales	Online	0
Monday, April 12, 2021	P0029	4	Direct Sales	Online	0
Monday, April 12, 2021	P0027	9	Direct Sales	Online	0
Monday, April 12, 2021	P0033	13	Direct Sales	Cash	0
Friday, April 23, 2021	P0028	10	Direct Sales	Online	0
Thursday, April 29, 2021	P0030	7	Direct Sales	Online	0
Friday, April 30, 2021	P0029	1	Direct Sales	Online	0
Sunday, May 9, 2021	P0028	8	Direct Sales	Cash	0

Editing Data in Power Query

Sales Report - Suji - Power Query Editor

File Home Transform Add Column View Tools Help

Close & Apply New Source Recent Sources Enter Data Data source settings Manage Parameters Refresh Preview Properties Advanced Editor Manage Query Choose Columns Remove Columns Keep Rows Remove Rows Sort Split Column Group By Data Type: Date Use First Row as Headers Replace Values Merge Queries Append Queries Combine Files Text Analytics Vision Azure Machine Learning

Queries [2]

- InputData
- MasterData

fx = Table.ExpandTableColumn(#"Merged Queries", "MasterData", {"PRODUCT", "CATEGORY", "UOM", "BUYING

	DATE	PRODUCT ID	QUANTITY	SALE TYPE	PAYMENT MODE
1	1/1/2021	P0024		9 Wholesaler	Online
2	1/26/2021	P0001		7 Online	Online
3	1/2/2021	P0038		15 Online	Cash
4	1/2/2021	P0013		6 Direct Sales	Cash
5	2/22/2021	P0013		5 Online	Cash
6	1/9/2021	P0003		8 Direct Sales	Cash
7	1/21/2021	P0003		9 Direct Sales	Online
8	1/3/2021	P0004		5 Direct Sales	Online
9	1/21/2021	P0004		15 Wholesaler	Cash
10	1/28/2021	P0004		10 Online	Cash
11	1/4/2021	P0035		12 Online	Online
12	1/19/2021	P0035		6 Direct Sales	Cash
13	1/25/2021	P0035		7 Direct Sales	Online
14	2/6/2021	P0035		1 Direct Sales	Cash
15	2/5/2021	P0005		1 Direct Sales	Cash
16	1/9/2021	P0031		1 Direct Sales	Cash
17	1/25/2021	P0031		14 Direct Sales	Online
18	1/26/2021	P0006		7 Online	Cash
19	1/9/2021	P0025		4 Direct Sales	Online
20	2/23/2021	P0025		3 Direct Sales	Cash
21	2/12/2021	P0008		7 Direct Sales	Cash

Query Settings

PROPERTIES

Name

InputData

APPLIED STEPS

- Source
- Navigation
- Changed Type
- Inserted Year
- Inserted Day
- Inserted Month
- Inserted Month Name
- Inserted Text Length
- Duplicated Column
- Removed Columns
- Inserted First Characters
- Merged Queries
- Expanded MasterData

Creating New Columns and Measures

Sales Report - Suji - Power Query Editor

File Home Transform Add Column View Tools Help

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Queries [2]

- InputData
- MasterData

fx = Table.ExpandTableColumn(#"Merged Queries", "MasterData", {"PRODUCT", "CATEGORY", "UOM", "BUYING"

	Year	Day	Month	Month Name	First Characters	
1	2021	1	1	January	Jan	Pr
2	2021	26	1	January	Jan	Pr
3	2021	2	1	January	Jan	Pr
4	2021	2	1	January	Jan	Pr
5	2021	22	2	February	Feb	Pr
6	2021	9	1	January	Jan	Pr
7	2021	21	1	January	Jan	Pr
8	2021	3	1	January	Jan	Pr
9	2021	21	1	January	Jan	Pr
10	2021	28	1	January	Jan	Pr
11	2021	4	1	January	Jan	Pr
12	2021	19	1	January	Jan	Pr
13	2021	25	1	January	Jan	Pr
14	2021	6	2	February	Feb	Pr
15	2021	5	2	February	Feb	Pr
16	2021	9	1	January	Jan	Pr
17	2021	25	1	January	Jan	Pr
18	2021	26	1	January	Jan	Pr
19	2021	9	1	January	Jan	Pr
20	2021	23	2	February	Feb	Pr
21	2021	12	2	February	Feb	Pr

Query Settings

PROPERTIES

Name

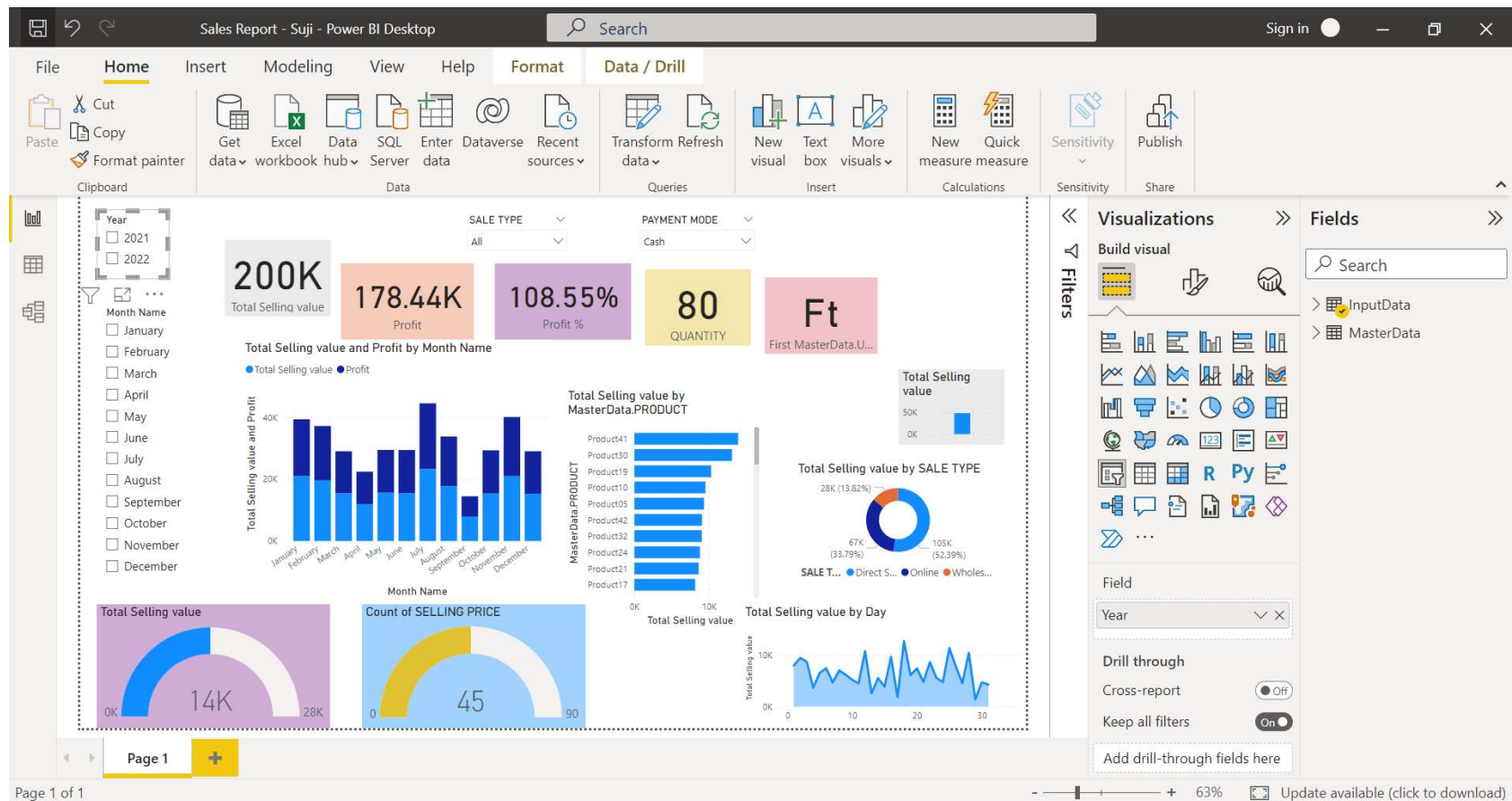
InputData

All Properties

APPLIED STEPS

- Source
- Navigation
- Changed Type
- Inserted Year
- Inserted Day
- Inserted Month
- Inserted Month Name
- Inserted Text Length
- Duplicated Column
- Removed Columns
- Inserted First Characters
- Merged Queries
- Expanded MasterData

Creating Visuals : Overall Sales Report Generated



Creating Visuals : Sales report on April,2022 and Online Purchase through Online Payment



Creating Visuals : Sales report on July,2021 and Wholesaler with cash Payment

