

Exercise

Create a Profit report

Introduction

In this exercise, you'll help Tailwind Traders develop a visually engaging and insightful profit report.

By completing this exercise, you'll demonstrate your ability to:

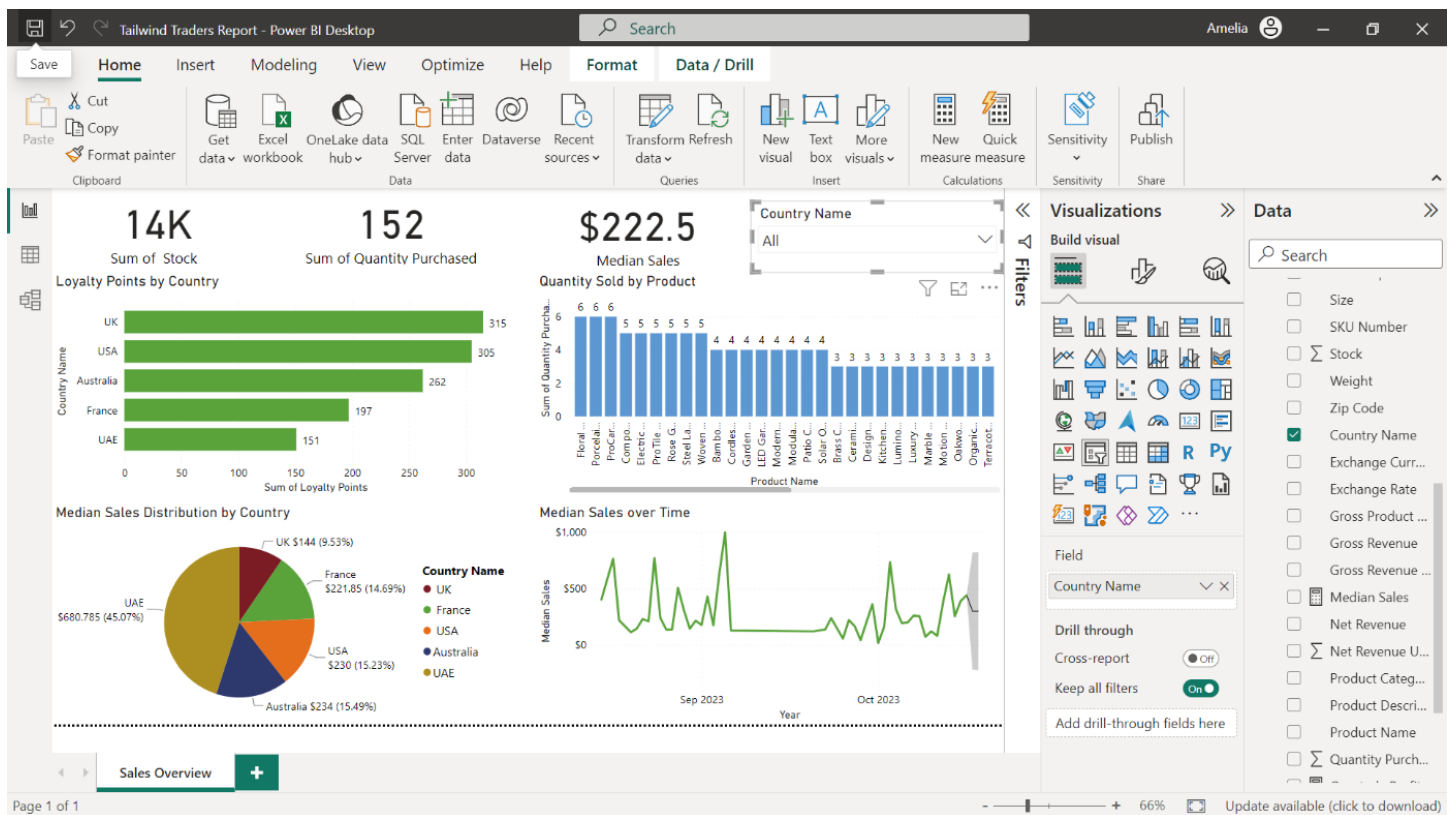
- Create different kinds of charts to display profit data.
- Display important profit metrics using cards and KPIs.

Case study

In the previous exercise, you created a sales report that displayed key insights into Tailwind Traders' sales. The company has requested a second report providing insights into its profits.

Instructions

Locate and open the **Tailwind Traders Report.pbix** Power BI file you have created in the previous exercise and follow the prompts below.



Step 1: Create a Profit Overview report

1. Open your **Sales Overview** report.
2. Create a new page in your existing **Sales Overview** report and name it **Profit Overview**.

Step 2: Create a bar chart for Net Revenue by Product

1. Create a clustered bar chart that visualizes **Net Revenue** using data from the **Product Sales in USD** table.
2. Configure the chart as follows:
 - Display the **Product Name** on the Y-Axis.
 - Display the **Net Revenue USD** on the X-Axis.
 - Resize and position the chart to the left side of the canvas.
 - Title the chart **Net Revenue by Product**.
 - Toggle on the data labels.
3. Note the product with the highest **Net Revenue** value.
4. Sort the data in descending order.

Tip: You can customize your chart using the **Format** tab to change colors, add titles, and adjust scales.

Step 3: Create a donut chart for Yearly Profit Margin by Country

1. Create a donut chart that visualizes **Yearly Profit Margin by Country** using data from the **Product Sales in USD** table.
2. Configure the chart as follows:
 - Display the **Country Name** in the **Legend** area.
 - Display the **Yearly Profit Margin** in the **Values** area.
 - Resize and position the chart to the right side of the canvas, next to the **Net Revenue by Product** chart.
 - Title the chart **Yearly Profit Margin by Country**.
 - Enable detailed labels for **Category**, percent the **Percent of total** category.

Step 4: Create an area chart for Yearly Profit Margin over Time

1. Create an area chart that visualizes **Yearly Profit Margin over Time** using data from the **CalendarTable**.
2. Configure the chart as follows:
 - Display the **Date** on the Y-Axis.
 - Display the **Yearly Profit Margin** on the X-Axis.
 - Resize and position the chart below the **Net Revenue by Product** bar chart and **Yearly Profit Margin by Country** donut chart.
 - Title the chart **Yearly Profit Margin over Time**.
 - Toggle on the **data labels**.

Step 5: Create cards to visualize your measures

1. Create cards that visualize the following measures:

- **YTD Profit**
- **Net Revenue USD**

2. Position the cards above the **Net Revenue by Product** bar chart.

Tip: Keep the card design simple and legible for quick data reference.

Step 6: Create a KPI for Gross Revenue USD

1. Create a KPI for **Gross Revenue USD**.

2. Configure the KPI as follows:

- Display the **Gross Revenue USD** in the value area
- Display the **Date** in the **Trend Axis** area.
- Resize and position the KPI next to the **Net Revenue USD card**.

Step 7: Add a slicer to the report

1. Create a slicer that displays the **Date** data from the **CalendarTable** table.

2. Position the slicer next to the **Gross Revenue USD KPI**.

3. Save and publish your report.

Conclusion

Having completed the assigned tasks, you've demonstrated your ability to visualize key metrics in the form of charts, cards and KPIs.