Exercise: Create a Sales report

Introduction

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

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

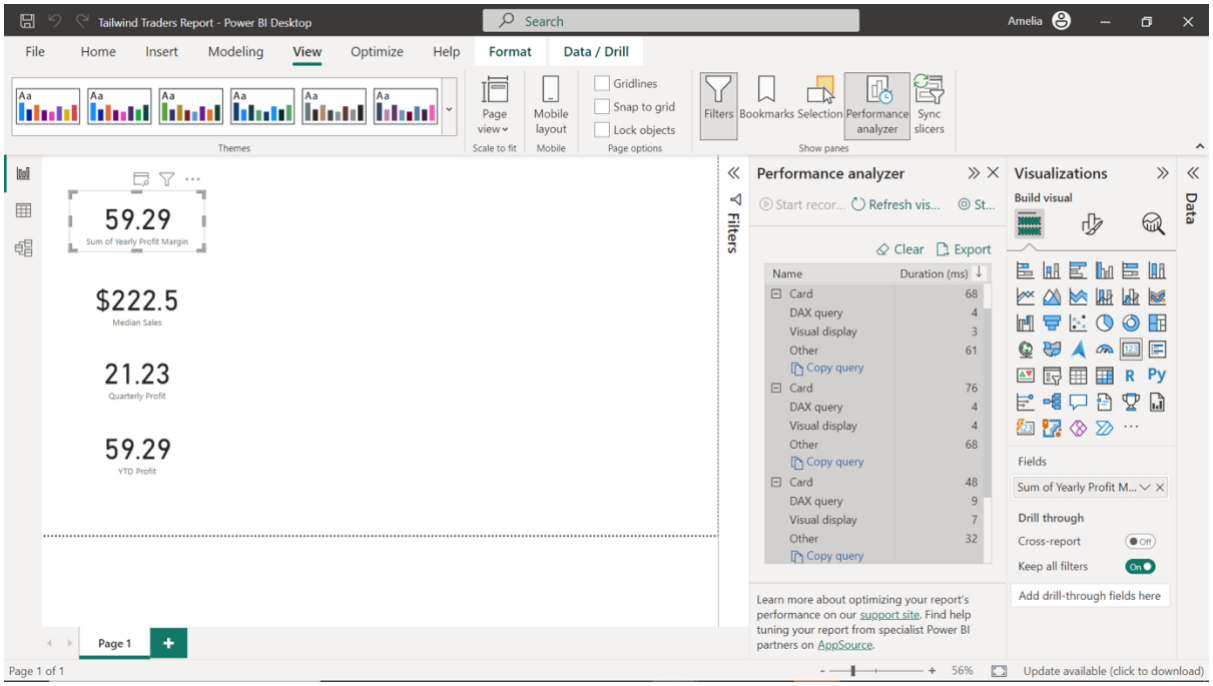
- Create different kinds of charts to display sales data.
- Display important sales metrics using cards and KPIs.

Case study

Tailwind Traders requires a report that enables the company to make sales decisions based on solid, data-driven insights. The company has requested that you generate such a report using the data from its **Sales in USD** table.

Instructions

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



Step 1: Create a Sales Overview report

1. Open the **Tailwind Traders Report.pbix** Power BI file.

2. Rename the report **Sales Overview**.

Step 2: Create a bar chart for loyalty points by country

1. Create a clustered bar chart that visualizes loyalty points by country using data from the **Sales in USD** table.

2. Configure the chart as follows:

- Display the country names on the Y-Axis.
- Display the loyalty points on the X-Axis.
- Resize and position the chart to the left side of the canvas.
- Title the chart **Loyalty Points by Country**.
- Toggle on the data labels.

3. Note the country with the highest loyalty points value.

Step 3: Create a column chart for quantity sold by product

1. Create a clustered column chart that visualizes the quantity sold by product using data from the **Sales in USD** table.

2. Configure the chart as follows:

- Display the product names on the Y-Axis.
- Display the quantity purchased on the X-Axis.
- Resize and position the chart to the right of the **Loyalty Points by Country** bar chart.
- Title the chart **Quantity Sold by Product**.
- Toggle on the data labels.

Tip: Adjust the column width for clarity, especially if many products exist.

Step 4: Create a pie chart for median sales distribution by country

1. Create a pie chart that visualizes median sales distribution by country using data from the **Sales in USD** table.

2. Configure the chart as follows:

- Display the country names in the **Legend** area.
- Display the median sales in the **Values** area.
- Adjust the chart size and position it below the **Loyalty Points by Country** bar chart.
- Title the chart **Median Sales Distribution by Country**.
- Display detailed labels.

3. Sort the data in ascending order.

Step 5: Create a line chart for median sales over time

1. Create a line chart that visualizes median sales over time using data from the **Sales in USD** table.

2. Configure the chart as follows:

- Display date data on the X-axis.
- Display median sales data on the Y-axis.
- Adjust and position the chart below the **Quantity Sold by Product** column chart.
- Title the chart **Median Sales Over Time**.
- Toggle on the data labels.

3. Configure an analytics forecast as follows:

- Set **Units** to **Days**.
- Set **Forecast Length** to **2**.
- Set **Confidence interval** to **99%**.

Tip: You can add a forecast using the **Analytics** pane.

Step 6: Create cards to visualize your measures

1. Create cards that visualize the following measures:

- **Stock**
- **Quantity Purchased**
- **Median Sales**

2. Position the cards as follows:

- Place the **Stock** and **Quantity Purchased** cards above the **Loyalty Points by Country** bar chart.
- Place the **Median Sales** card above the **Quantity Sold by Product** column chart.

Tip: Keep your card designs simple for clear and immediate data presentation.

Step 7: Add a slicer to the report

1. Create a slicer that displays the **Country Name** data from the **Sales in USD** table.
2. Position the slicer above the **Quantity Sold by Product** column chart.
3. Save and publish your report.

Conclusion

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