



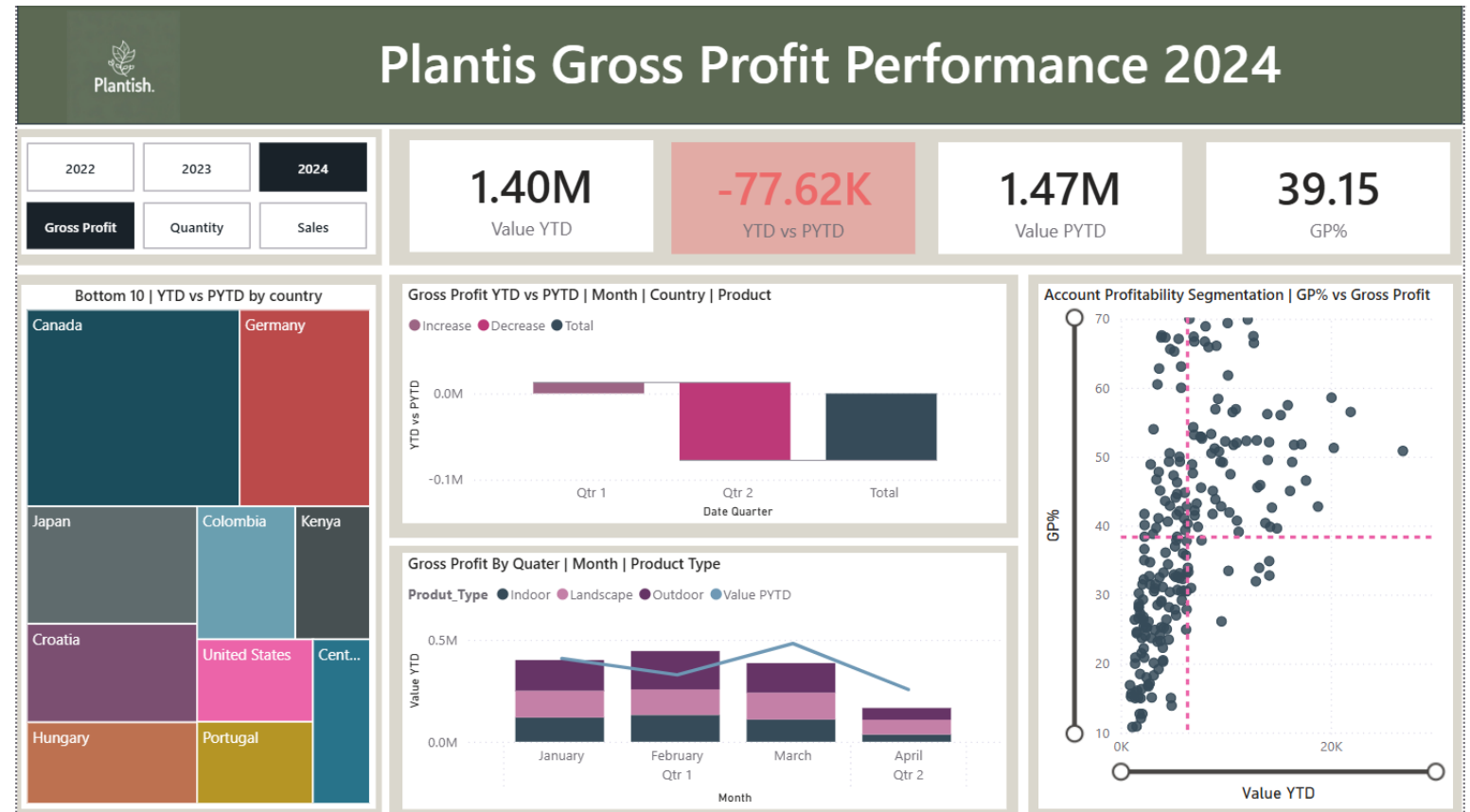
PowerBI Plantis Report





Presentation flow

- Business context
- Objectives
- Hands-on





Business context








- The company – Plantis - operates in the botanical/plant products industry, offering product types such as Landscape, Indoor, and Outdoor plants.
- Sales data is tracked across countries, product types, and time periods.
- The need for a performance dashboard stems from leadership's requirement for YTD vs. PYTD tracking, profitability segmentation, and strategic regional insights.





Objectives

[Modern Guide to Data Storytelling](#)

-  **Monitor Quantity Performance**
 - Measure total **Quantity YTD vs. PYTD**.
 - Highlight countries with significant **increase or decrease** in quantity sold.
-  **Track Sales Value and Profitability**
 - Analyze **YTD Sales, Gross Profit %, and GP segmentation**.
 - Provide a breakdown of value by **Product Type** and **Time Period** (month/quarter).
-  **Identify Underperforming Regions**
 - Use **tree maps** and **bar charts** to visualize the **bottom 10 countries** by YTD vs. PYTD quantity performance.
-  **Segmentation of Accounts by Profitability**
 - Segment accounts using a **scatter plot** of GP% vs. Value YTD.
 - Support decisions on which accounts to grow, retain, or deprioritize.
-  **Time Series & Comparative Analysis**
 - Evaluate **monthly and quarterly** sales trends for each product type.
 - Compare **YTD vs. PYTD** using clear visuals and deltas.





Report features

- Dynamic report
- Waterfall chart
- Dynamic title
- Zoom slicers
- Treemap
- Drill down
- Top N filter
- Adding average lines and **much more !!!!**





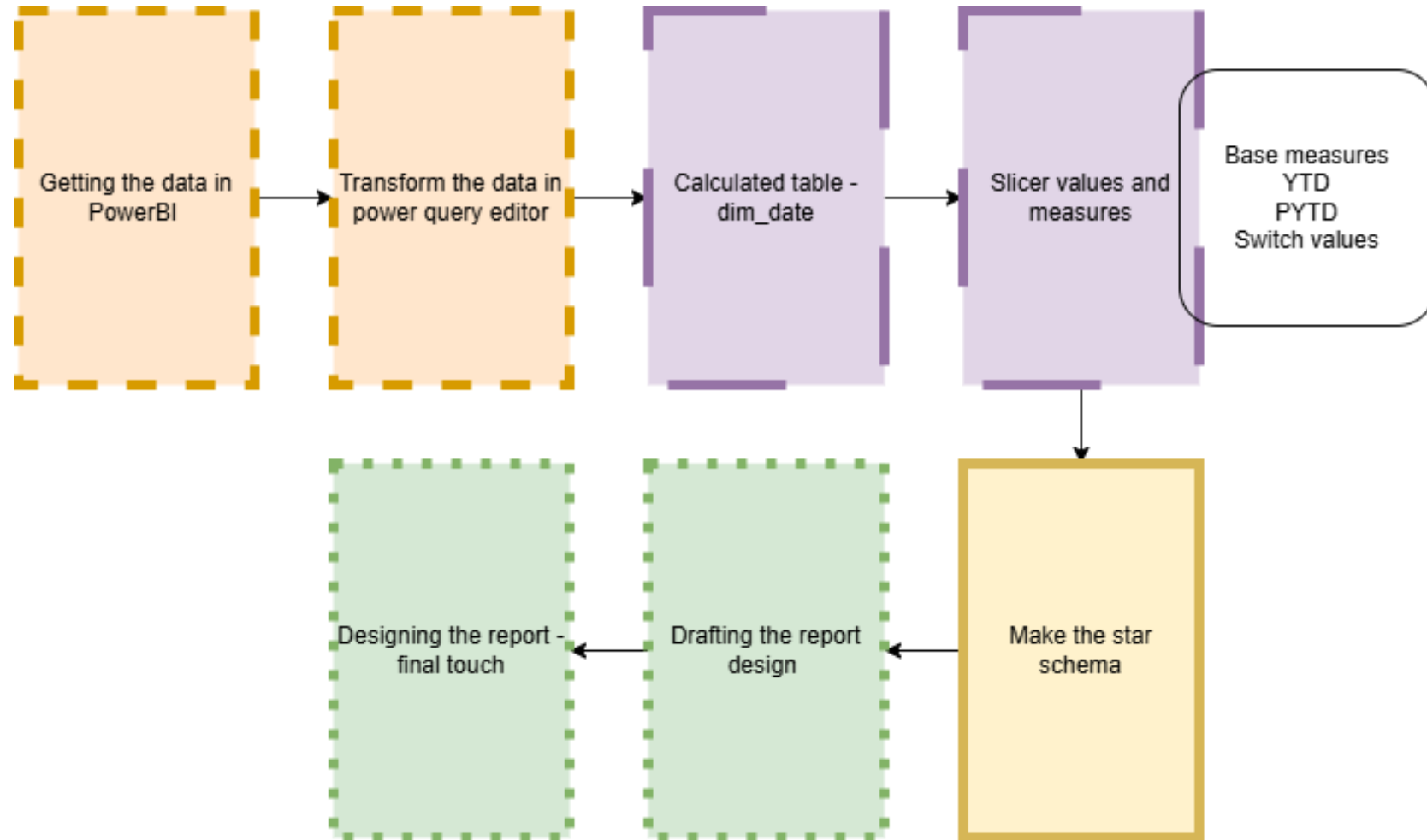
Hands on

https://github.com/itisha89/PBI_Plantish





Project flow





DAX

```
Dim_date = CALENDAR(DATE(2022,01,01),  
DATE(2024, 12,31))
```

```
Inpast =  
    var lastsalesdate =  
    MAX(Fact_Sales[Date_Time])  
    var lastsalesdatePY =  
    EDATE(lastsalesdate,-12)  
    Return  
        Dim_date[Date]<=lastsalesdatePY
```

```
sales = SUM(Fact_Sales[Sales_USD])
```

```
quantity = sum(Fact_Sales[quantity])
```

```
cogs = sum(Fact_Sales[COGS_USD])
```

```
Gross Profit = [sales]-[cogs]
```

```
PYTD_Gross Profit = CALCULATE([Gross  
Profit],SAMEPERIODLASTYEAR(Dim_date[Date]),Dim_  
date[inpast]=TRUE)
```

```
PYTD_Quantity =  
CALCULATE([quantity],SAMEPERIODLASTYEAR(  
Dim_date[Date]),Dim_date[inpast]=TRUE)
```

```
PYTD_Sales =  
CALCULATE([sales],SAMEPERIODLASTYEAR(Di  
m_date[Date]),Dim_date[inpast]=TRUE)
```

```
Switch_PYTD =  
    var selected_value =  
    SELECTEDVALUE(Slc_values[Value])  
    var result =  
    SWITCH(selected_value,  
        "Sales", [PYTD_Sales],  
        "Quantity", [PYTD_Quantity],  
        "Gross Profit", [PYTD_Gross  
Profit],  
        Blank()  
    return result
```





DAX

```
Switch_YTD =  
    var selected_value =  
        SELECTEDVALUE(Slc_values[Value])  
    var result =  
        SWITCH(selected_value,  
            "Sales",[YTD_Sales],  
            "Quantity",[YTD_Quantity],  
            "Gross Profit", [YTD_Gross  
Profit],  
            Blank()  
        )  
    return result
```

```
YTD vs PYTD = [Switch_YTD]-  
[Switch_PYTD]
```

```
YTD_Gross_Profit = TOTALYTD([Gross  
Profit],Fact_Sales[Date_Time])
```

```
YTD_Quantity =  
TOTALYTD([quantity],Fact_Sales[Date_Time])
```

```
YTD_Sales =  
TOTALYTD([sales],Fact_Sales[Date_Time])
```

```
bar chart title =  
SELECTEDVALUE(Slc_values[Value]) & " By Quater  
| Month | Product Type"
```

```
report title = "Plantis " &  
SELECTEDVALUE(Slc_values[Value]) & "  
Performance "&  
SELECTEDVALUE(Dim_date[Date].[Year])
```

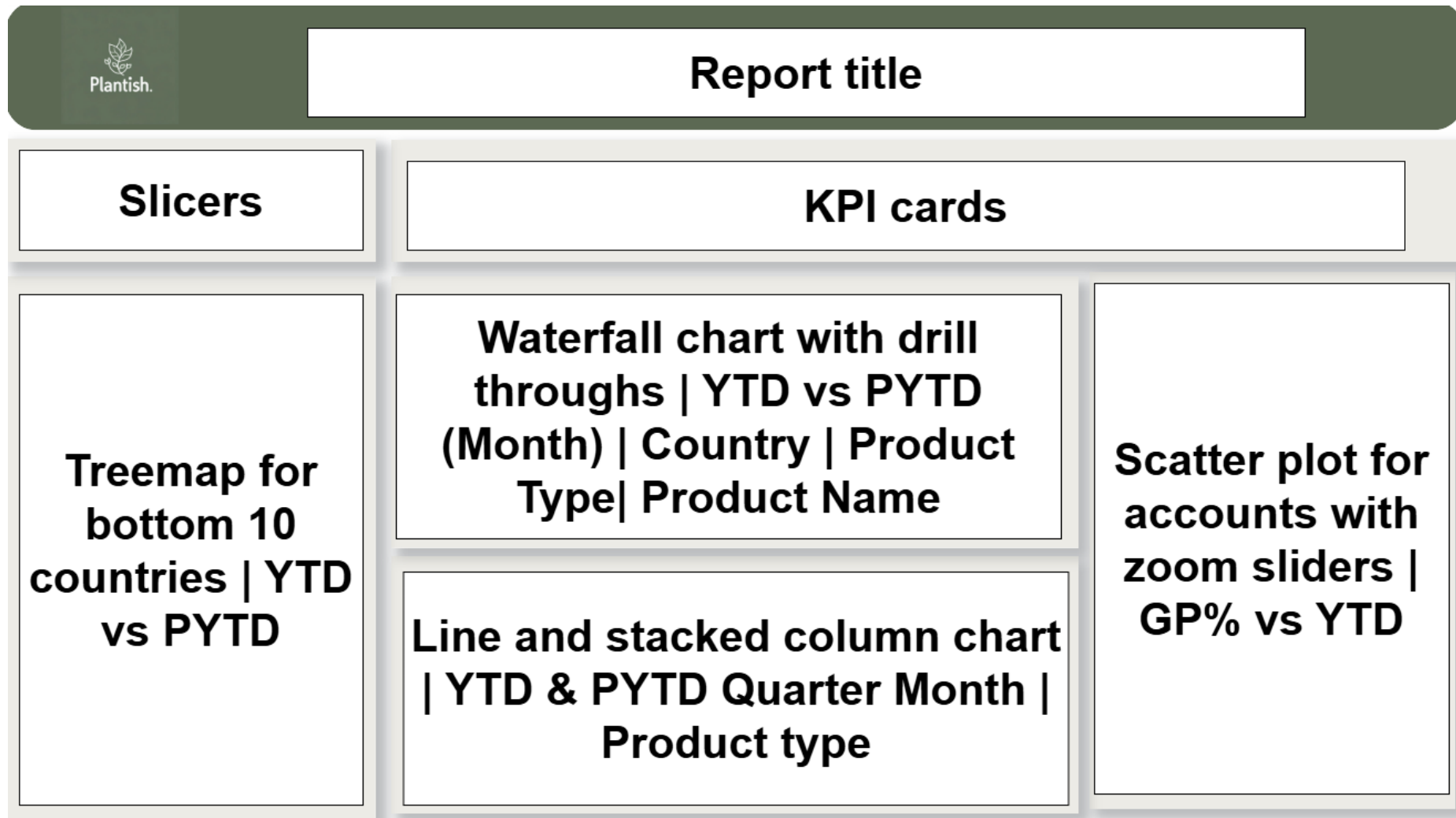
```
scatter plot title = "Account Profitability  
Segmentation | GP% vs "&  
SELECTEDVALUE(Slc_values[Value])
```

```
waterfall title =  
SELECTEDVALUE(Slc_values[Value]) & " YTD vs  
PYTD | Month | Country | Product"
```





Report layout and color scheme



#5C6953

#DAD7CD

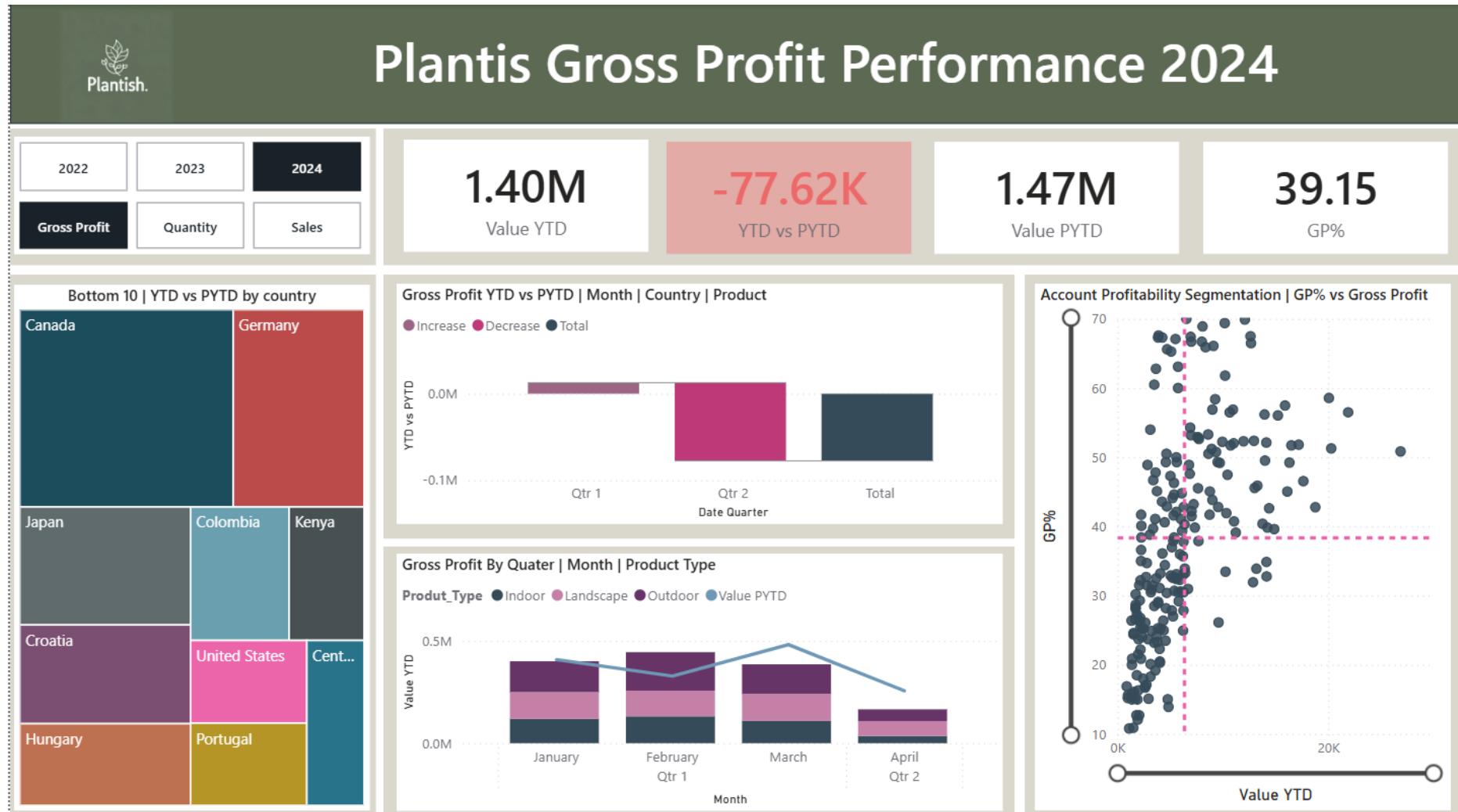
#ED6969

#6E98B5





https://github.com/itisha89/PBI_Plantish





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