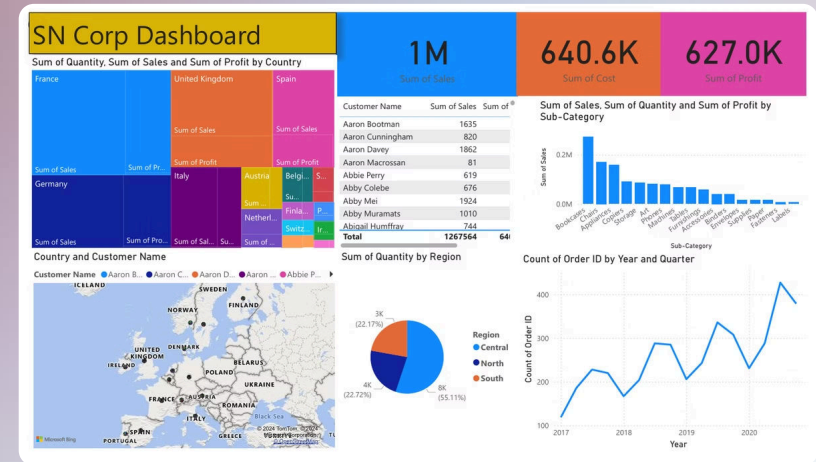# Microsoft Power BI Dashboard for Sales and Profit Analysis

This presentation will demonstrate the steps involved in creating a comprehensive Power BI dashboard that analyzes sales and profit data for your company. This dashboard will provide valuable insights into your company's performance and help you make informed business decisions.

(K) **by Kavya S AI & DS**

Connecting Data Sources

Sales Data

Import data from your CRM, ERP, or other sales systems to capture sales volume, revenue, customer details, and product information.

Financial Data

Connect to accounting software or spreadsheets to access data on expenses, costs of goods sold, and other financial metrics.

External Data

Consider integrating data from industry reports, market trends, and economic indicators to gain a broader perspective.

Dashboard Layout Design

Visual Clarity

Organize information in a logical and visually appealing manner. Use intuitive icons, clear labels, and contrasting colors to enhance readability.
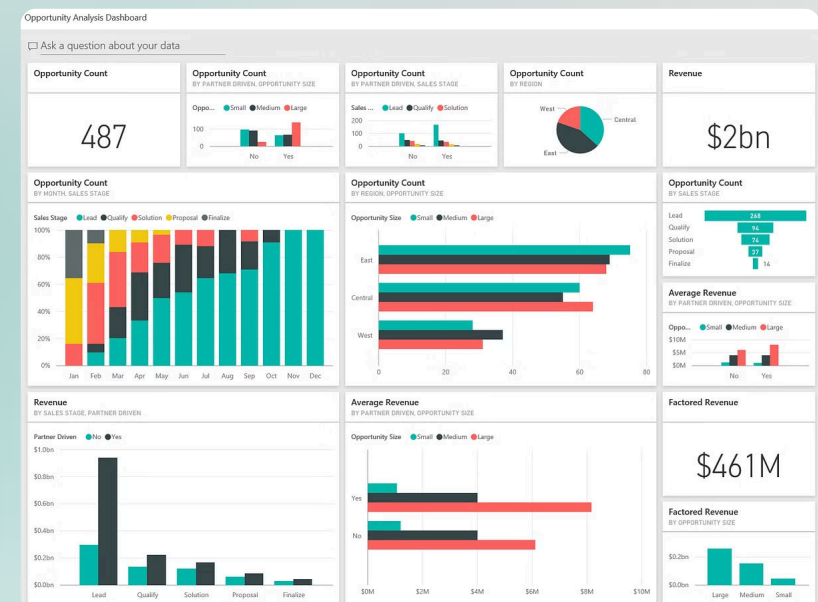
Key Performance Indicators

Highlight critical metrics like total revenue, profit margin, and customer acquisition cost. Use charts or gauges to display these metrics prominently.

Data Drill-Down

Enable users to explore data at different levels of detail. Include interactive filters and slicers to allow for data segmentation and analysis.

Visual Storytelling

Use visuals to communicate insights effectively. Emphasize trends, patterns, and anomalies with appropriate charts and graphs.

Creating Sales Trend Visualizations

1

Line Charts

Visualize sales revenue over time, revealing growth patterns, seasonal trends, and potential outliers.
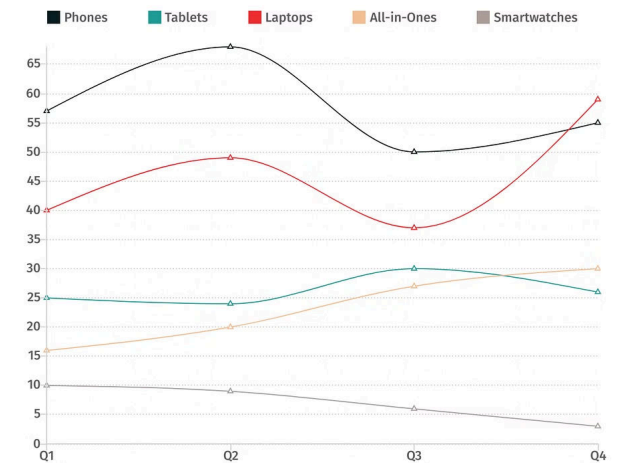
2

Bar Charts

Compare sales performance across different product categories, sales regions, or time periods.

3

Area Charts

Show the cumulative sales volume over time, highlighting the overall contribution of different product categories.

SALES TREND ANALYSIS

■ Phones ■ Tablets ■ Laptops ■ All-in-Ones ■ Smartwatches

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Analyzing Profit Margins and Profitability

1 **Gross Profit Margin**

Calculate the percentage of revenue remaining after deducting the cost of goods sold. Identify products or categories with higher profit margins.

2 **Operating Profit Margin**

Analyze the profit generated from core business operations after deducting operating expenses. Track the efficiency of your business model.
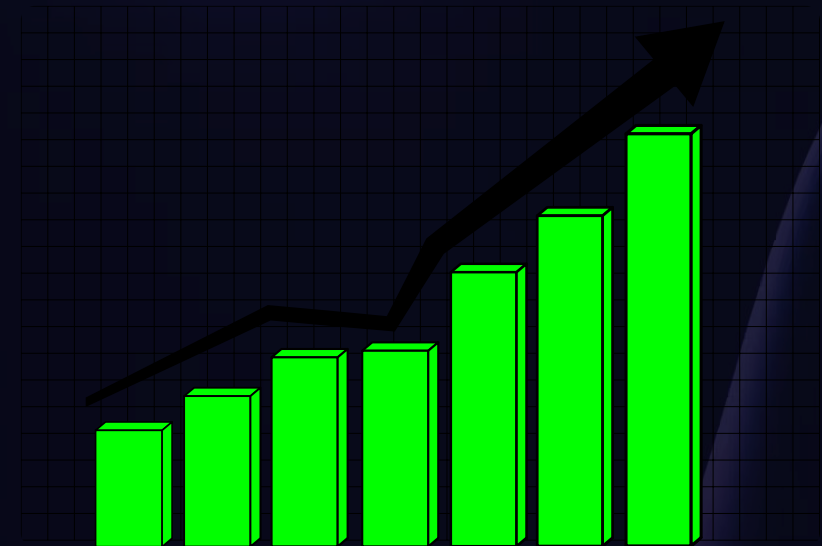
3 **Net Profit Margin**

Evaluate the overall profitability of your business by taking into account all expenses, including taxes and interest.

4 **Profitability Trends**

Monitor profit margin changes over time to identify potential areas for improvement and assess the effectiveness of business strategies.

measurable

relevant

Incorporating KPIs and Performance Metrics

KPI	Description	Visualization
Total Revenue	Overall sales revenue generated	Card, Gauge
Average Order Value	Average revenue per customer transaction	Card, Bar Chart
Customer Acquisition Cost	Cost associated with acquiring a new customer	Card, Gauge
Customer Lifetime Value	Estimated total revenue generated from a single customer	Card, Line Chart

Enabling Data Exploration and Filtering

Slicers

Allow users to easily filter data by selecting specific values, such as product categories, sales regions, or time periods.

Search Bar

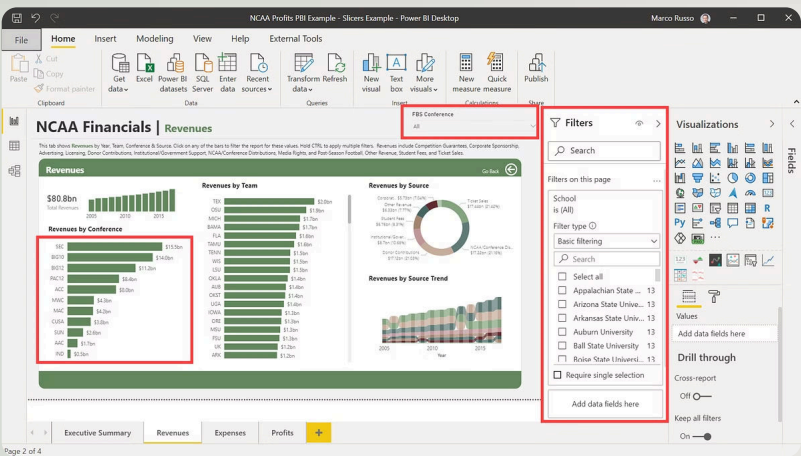Enable users to quickly search for specific data points within the dashboard.

Drill-Down Functionality

Allow users to delve deeper into specific data segments by clicking on charts or graphs to reveal more granular information.

Data Highlighting

Use interactive highlighting to emphasize relevant data points when users select specific filters or drill down into data.

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Sharing and Publishing the Power BI Dashboard

1 Sharing Options

Publish your dashboard to the Power BI service or embed it into websites or applications. Utilize features like "share to web" or "publish to Power BI service".

2 User Permissions

Control access to your dashboard by granting different levels of permissions to users, enabling collaboration and data security.

3 Data Refresh

Set up automatic data refresh schedules to ensure that your dashboard displays the latest information, enabling real-time insights.