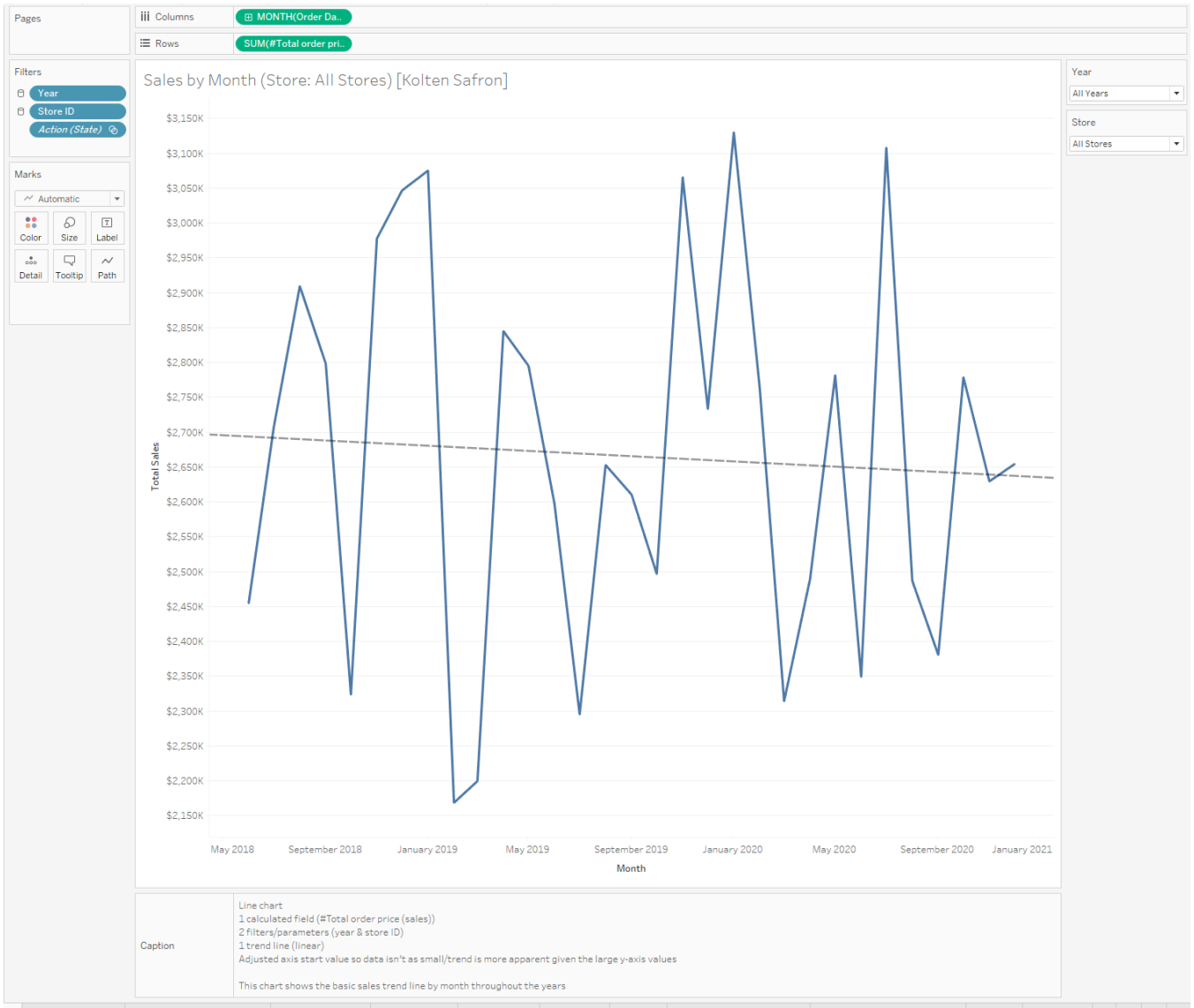
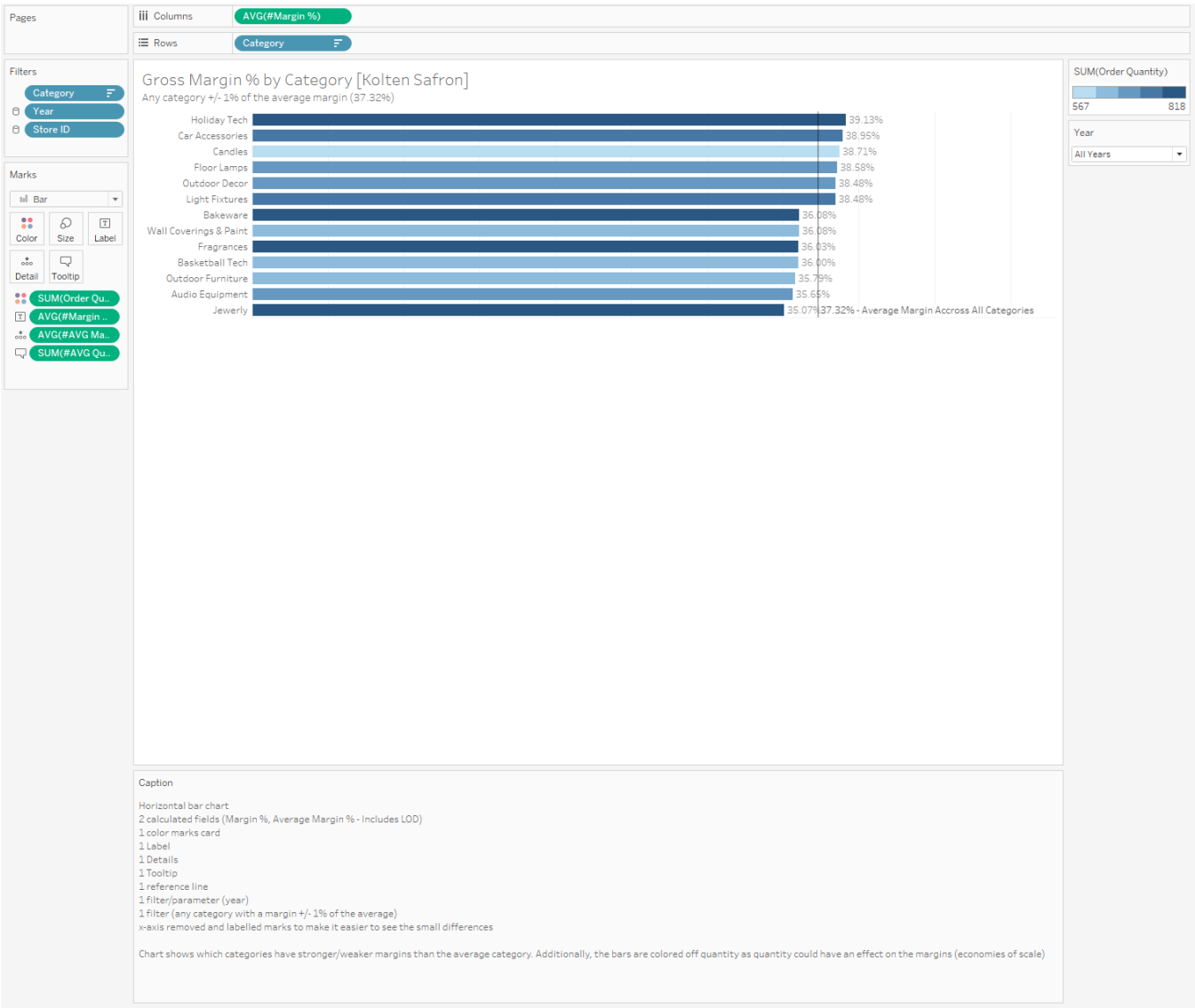
Charts Pt 1. – 4 or more


Pages
Columns
MONTH(Order Da..
Rows
SUM(#Total order pri..
Filters
Year
Store ID
Action (State)
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Path
Sales by Month (Store: All Stores) [Kolten Safron]
$3,150K
$3,100K
$3,050K
$3,000K
$2,950K
$2,900K
$2,850K
$2,800K
$2,750K
$2,700K
$2,650K
$2,600K
$2,550K
$2,500K
$2,450K
$2,400K
$2,350K
$2,300K
$2,250K
$2,200K
$2,150K
Total Sales
May 2018
September 2018
January 2019
May 2019
September 2019
January 2020
May 2020
September 2020
January 2021
Month
Year
All Years
Store
All Stores
Caption
Line chart
1 calculated field (#Total order price (sales))
2 filters/parameters (year & store ID)
1 trend line (linear)
Adjusted axis start value so data isn't as small/trend is more apparent given the large y-axis values
This chart shows the basic sales trend line by month throughout the years


Pages
Columns
AVG(#Margin %)
Rows
Category
Filters
Category
Year
Store ID
Marks
Bar
Color
Size
Label
Detail
Tooltip
SUM(Order Qu..
AVG(#Margin ..
AVG(#AVG Ma..
SUM(#AVG Qu..
Gross Margin % by Category [Kolten Safron]
Any category +/- 1% of the average margin (37.32%)
Holiday Tech 39.13%
Car Accessories 38.95%
Candles 38.71%
Floor Lamps 38.58%
Outdoor Decor 38.48%
Light Fixtures 38.48%
Bakeware 36.08%
Wall Coverings & Paint 36.08%
Fragrances 36.03%
Basketball Tech 36.00%
Outdoor Furniture 35.79%
Audio Equipment 35.65%
Jewerly 35.07%
37.32% - Average Margin Accross All Categories
SUM(Order Quantity)
567
818
Year
All Years
Caption
Horizontal bar chart
2 calculated fields (Margin %, Average Margin % - Includes LOD)
1 color marks card
1 Label
1 Details
1 Tooltip
1 reference line
1 filter/parameter (year)
1 filter (any category with a margin +/- 1% of the average)
x-axis removed and labelled marks to make it easier to see the small differences
Chart shows which categories have stronger/weaker margins than the average category. Additionally, the bars are colored off quantity as quantity could have an effect on the margins (economies of scale)

Pages

Columns

Rows

Filters

Year

Store ID

Marks

Automatic

Color | Size | Label | Detail | Tooltip

SUM(Populati..

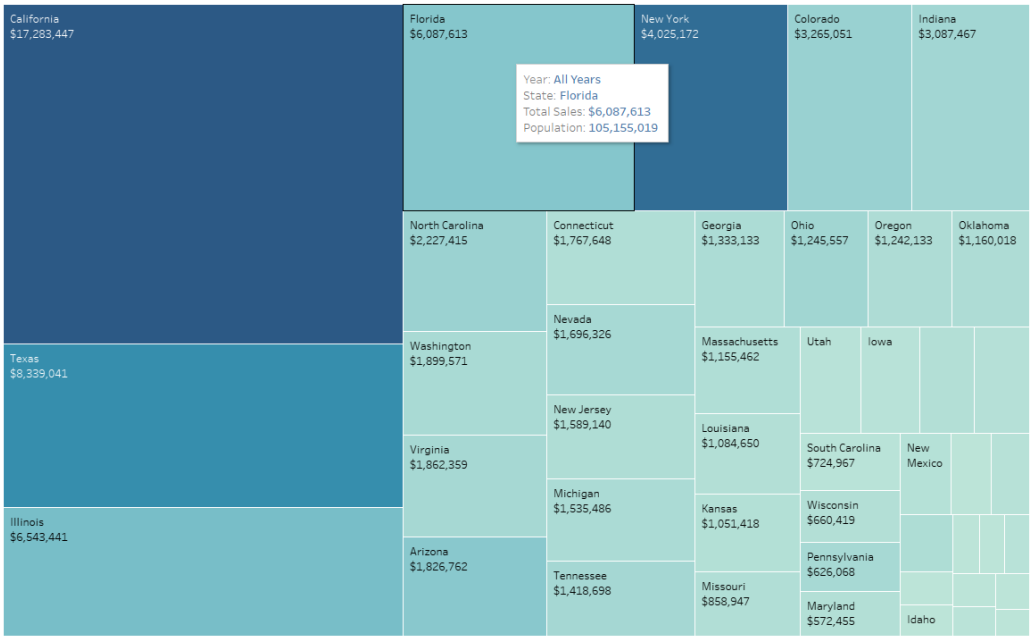
SUM(#Total or..

State (Regions..

State (Regions..

SUM(#Total or..

Sales by State and Population [Kolten Safron]



Year

All Years

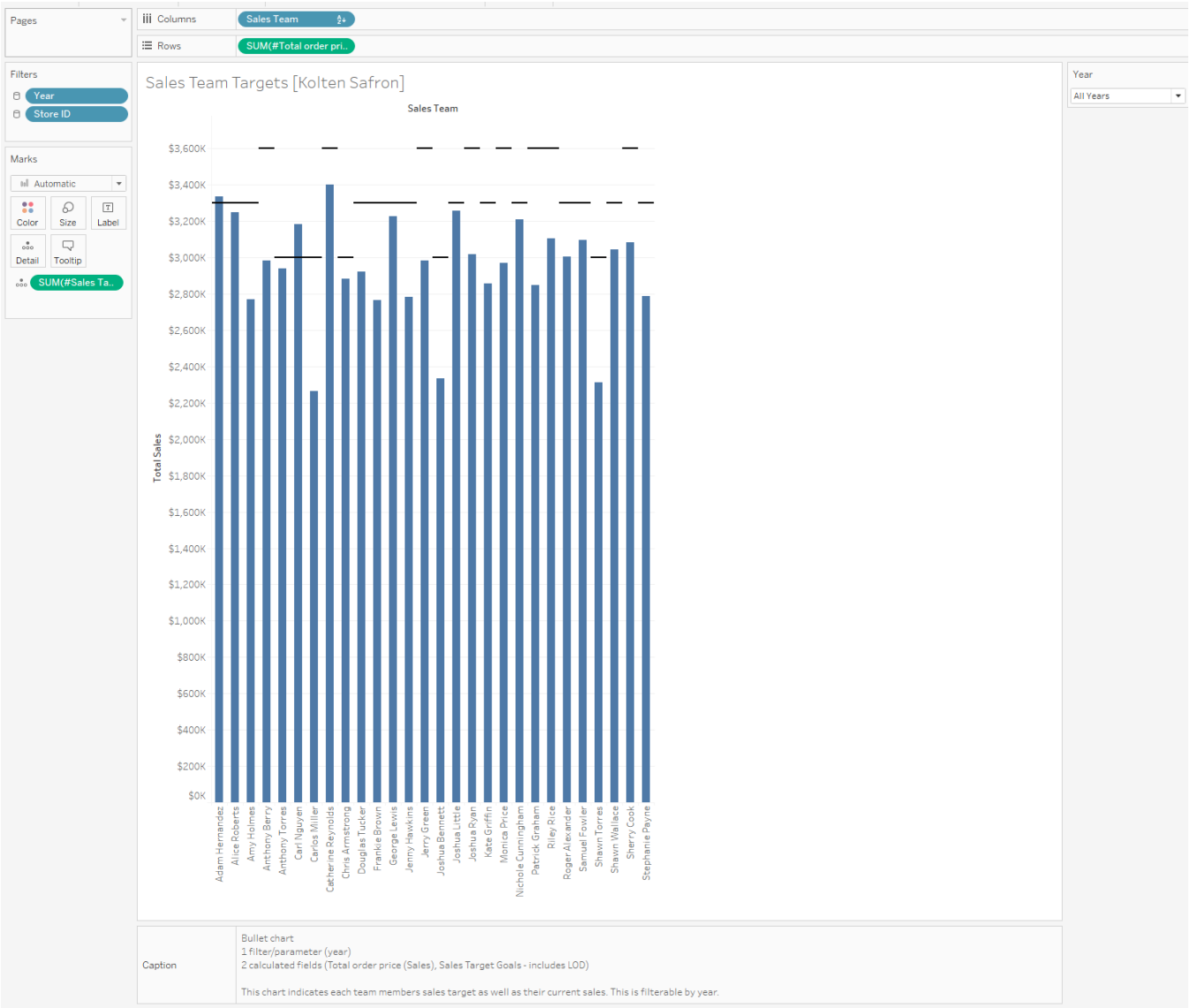
SUM(Population)

2,963,075 441M

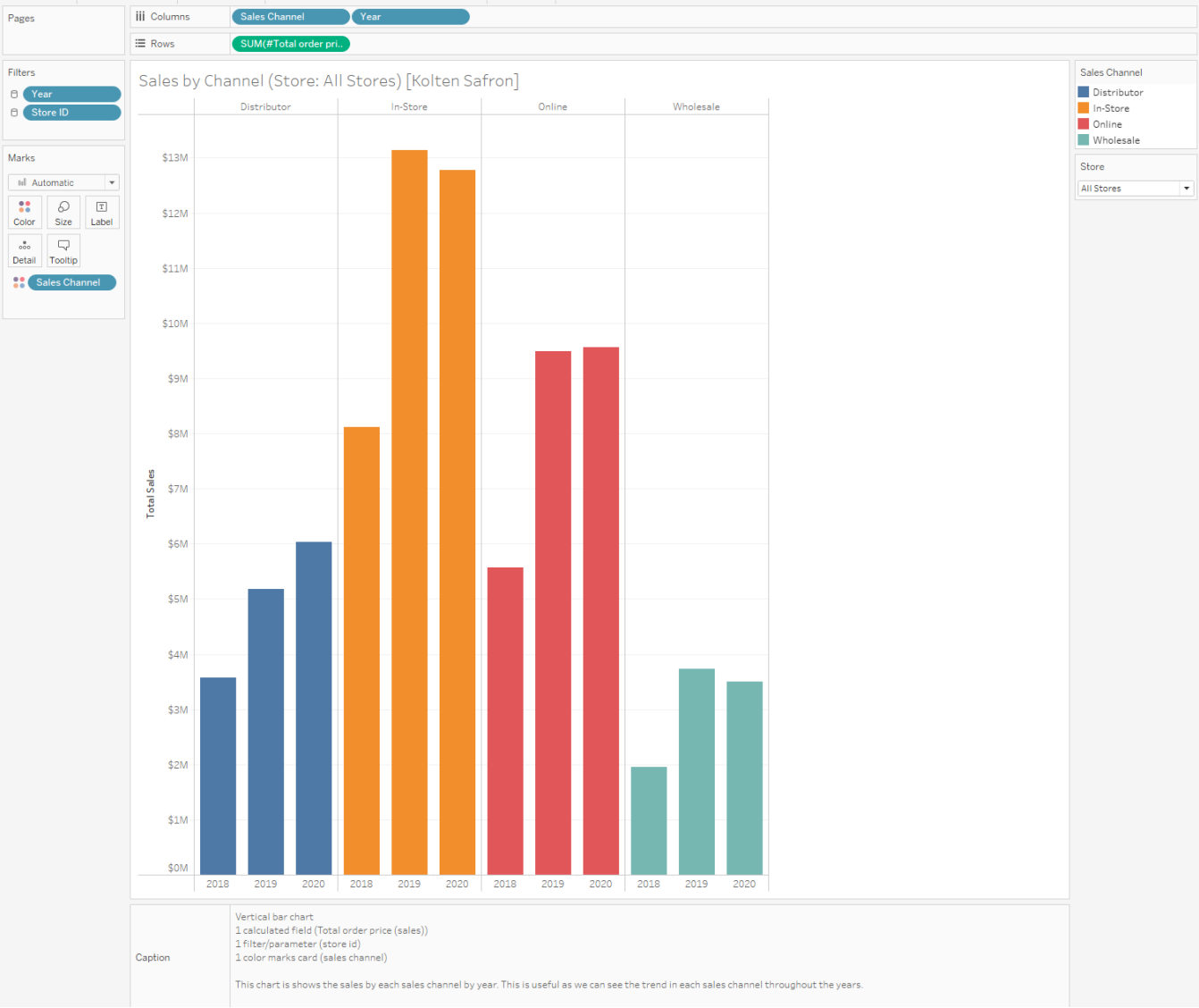
Caption

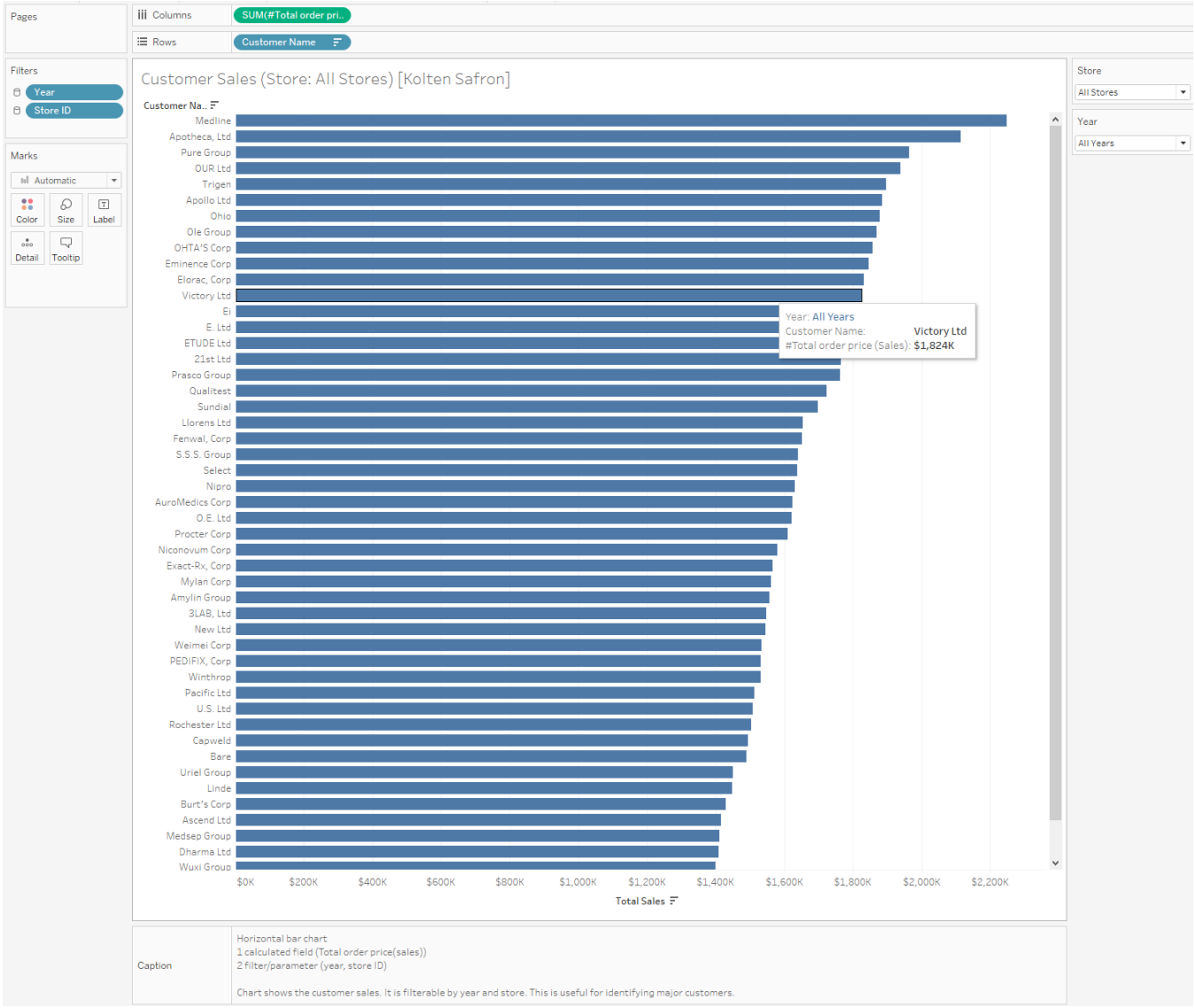
Tree map
1 calculated field (Total order price (Sales))
1 color marks card (Total order price (sales))
2 labels
1 filter/parameter (year)

This chart is used to highlight how much sales each state had by their size. In addition, it also adds in visualization for the population by putting the color based on population size. This way you can tell which states may be underperforming based on population.

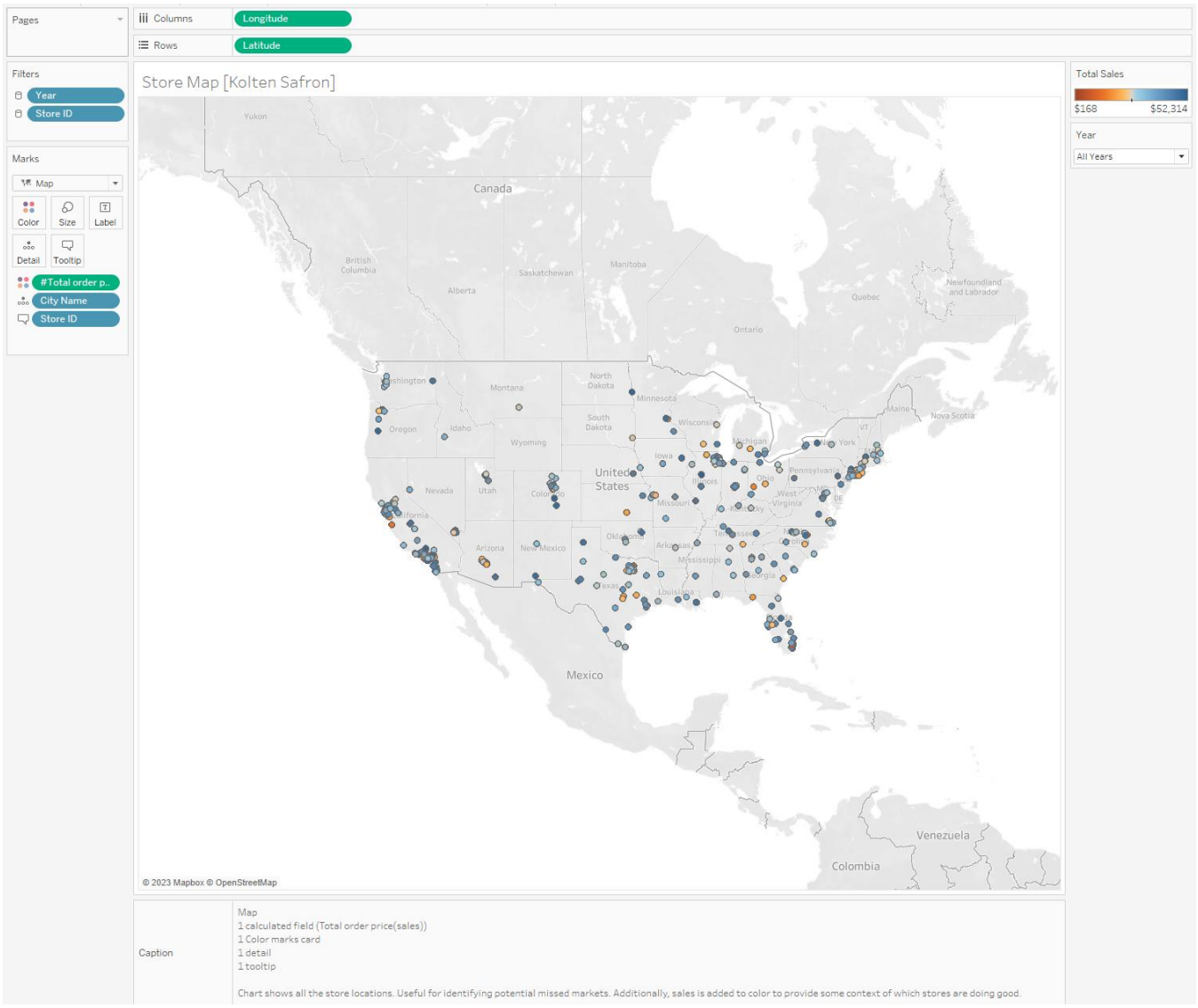


Caption	Bullet chart 1 filter/parameter (year) 2 calculated fields (Total order price (Sales), Sales Target Goals - includes LOD) This chart indicates each team members sales target as well as their current sales. This is filterable by year.

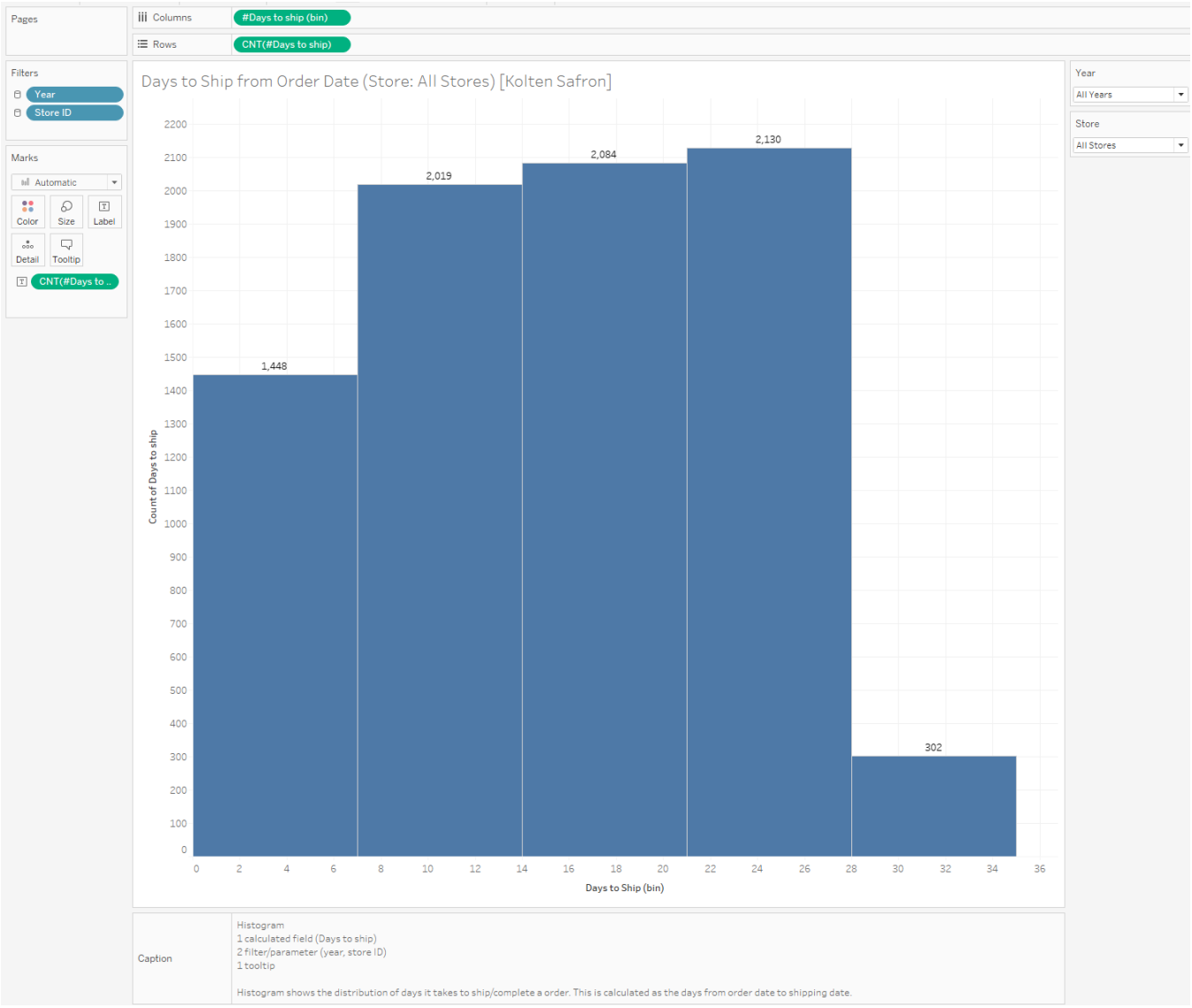

Pages
Columns
Sales Channel
Year
Rows
SUM(#Total order pri..
Filters
Year
Store ID
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Sales Channel
Sales by Channel (Store: All Stores) [Kolten Safron]
Distributor
In-Store
Online
Wholesale
Total Sales
$0M
$1M
$2M
$3M
$4M
$5M
$6M
$7M
$8M
$9M
$10M
$11M
$12M
$13M
2018
2019
2020
Sales Channel
Distributor
In-Store
Online
Wholesale
Store
All Stores
Caption
Vertical bar chart
1 calculated field (Total order price (sales))
1 filter/parameter (store id)
1 color marks card (sales channel)
This chart is shows the sales by each sales channel by year. This is useful as we can see the trend in each sales channel throughout the years.


Pages
Columns
SUM(#Total order pri..
Rows
Customer Name
Filters
Year
Store ID
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Customer Sales (Store: All Stores) [Kolten Safron]
Customer Na..
Medline
Apotheca, Ltd
Pure Group
OUR Ltd
Trigen
Apollo Ltd
Ohio
Ole Group
OHTA'S Corp
Eminence Corp
Elorac, Corp
Victory Ltd
Ei
E. Ltd
ETUDE Ltd
21st Ltd
Prasco Group
Qualitest
Sundial
Llorens Ltd
Fenwal, Corp
S.S.S. Group
Select
Nipro
AuroMedics Corp
O.E. Ltd
Procter Corp
Niconovum Corp
Exact-Rx, Corp
Mylan Corp
Amylin Group
3LAB, Ltd
New Ltd
Weimei Corp
PEDIFIX, Corp
Winthrop
Pacific Ltd
U.S. Ltd
Rochester Ltd
Capweld
Bare
Uriel Group
Linde
Burt's Corp
Ascend Ltd
Medsep Group
Dharma Ltd
Wuxi Group
Year: All Years
Customer Name: Victory Ltd
#Total order price (Sales): $1,824K
$0K
$200K
$400K
$600K
$800K
$1,000K
$1,200K
$1,400K
$1,600K
$1,800K
$2,000K
$2,200K
Total Sales
Store
All Stores
Year
All Years
Caption
Horizontal bar chart
1 calculated field (Total order price(sales))
2 filter/parameter (year, store ID)
Chart shows the customer sales. It is filterable by year and store. This is useful for identifying major customers.

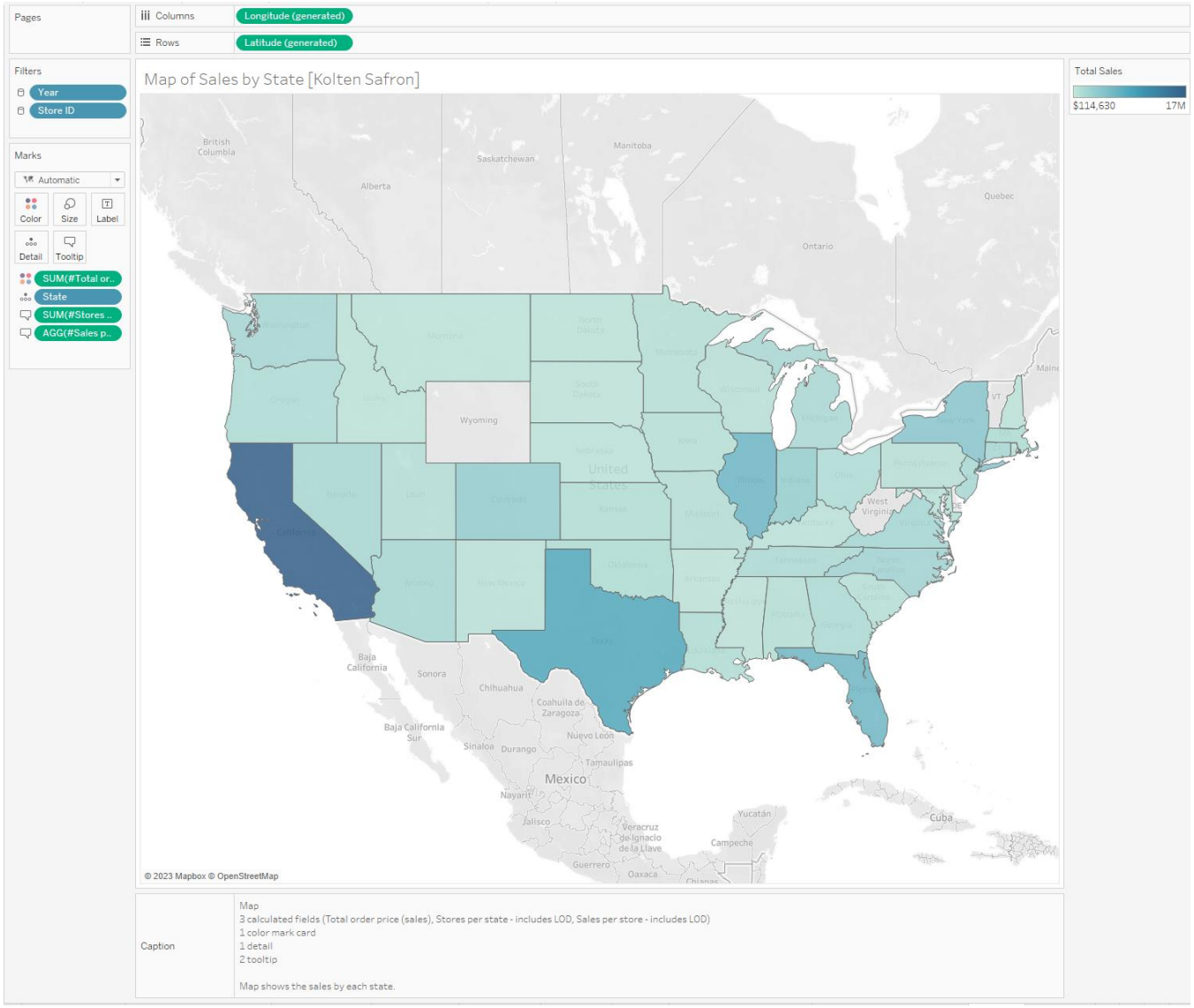
Charts Pt 2. – 3 or more



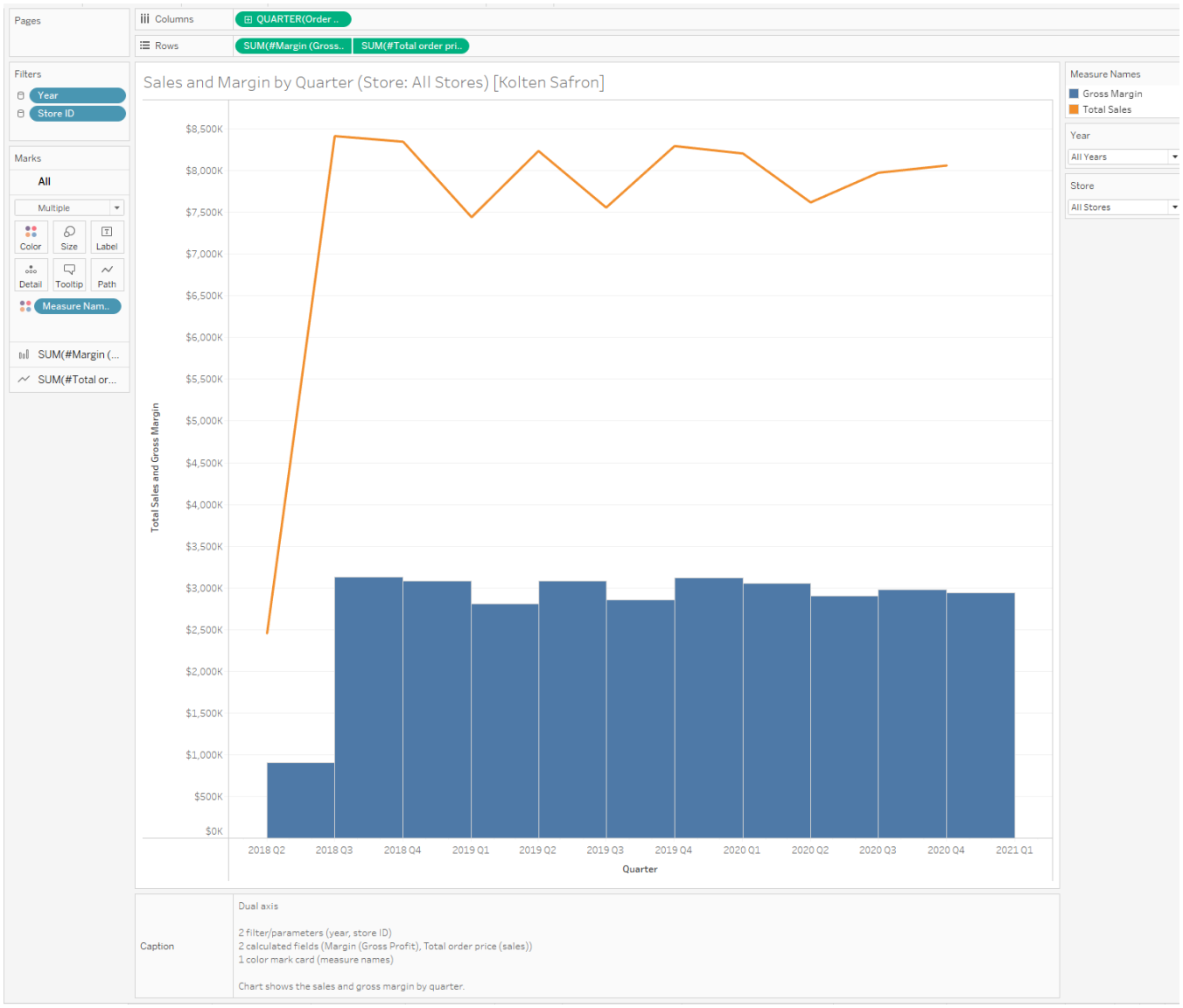
Caption	Map 1 calculated field (Total order price(sales)) 1 Color marks card 1 detail 1 tooltip Chart shows all the store locations. Useful for identifying potential missed markets. Additionally, sales is added to color to provide some context of which stores are doing good.

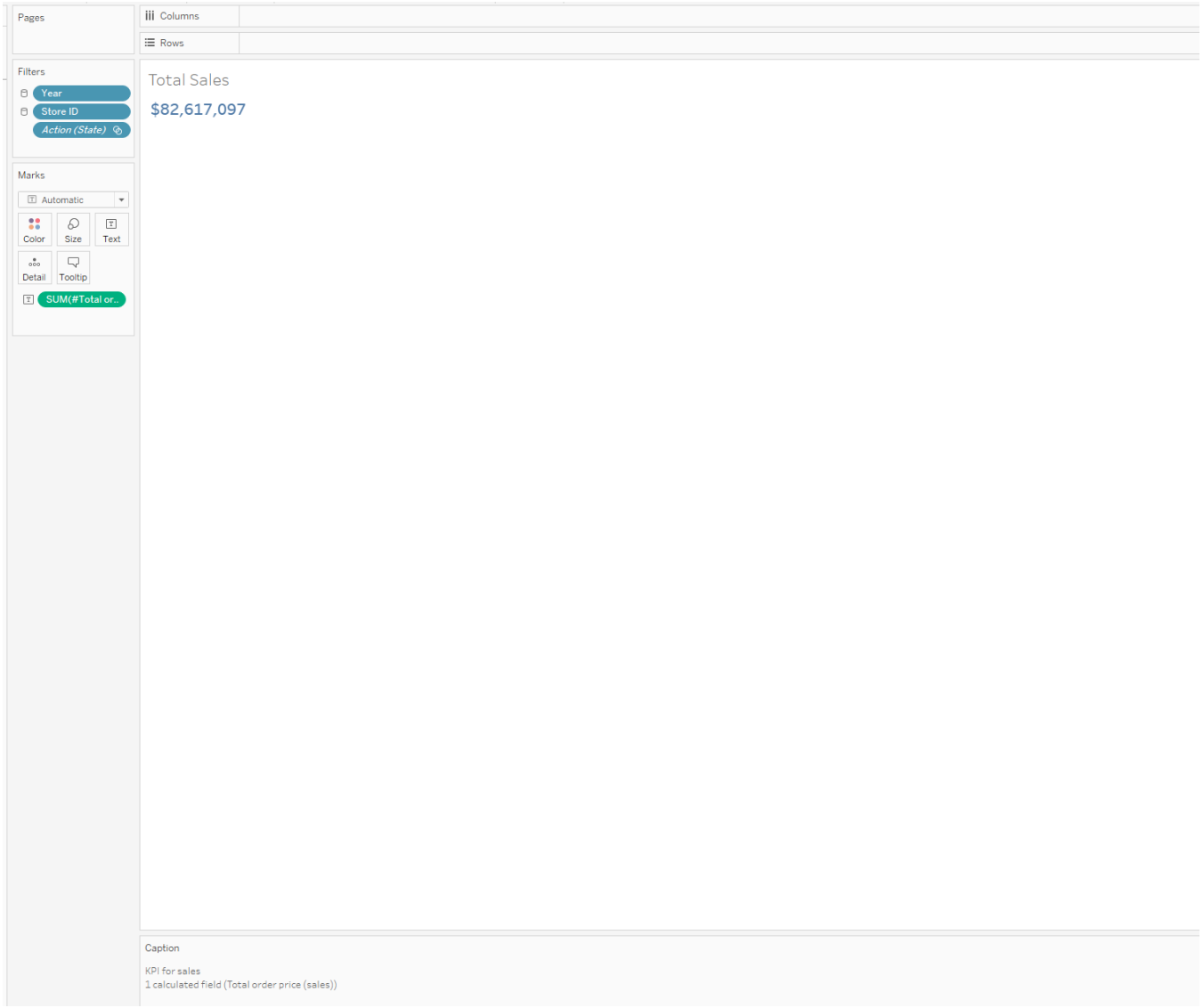

Pages
Columns
#Days to ship (bin)
Rows
CNT(#Days to ship)
Filters
Year
Store ID
Marks
Automatic
Color
Size
Label
Detail
Tooltip
CNT(#Days to ..
Days to Ship from Order Date (Store: All Stores) [Kolten Safron]
Year
All Years
Store
All Stores
Count of Days to ship
Days to Ship (bin)
1,448
2,019
2,084
2,130
302
Caption
Histogram
1 calculated field (Days to ship)
2 filter/parameter (year, store ID)
1 tooltip
Histogram shows the distribution of days it takes to ship/complete a order. This is calculated as the days from order date to shipping date.

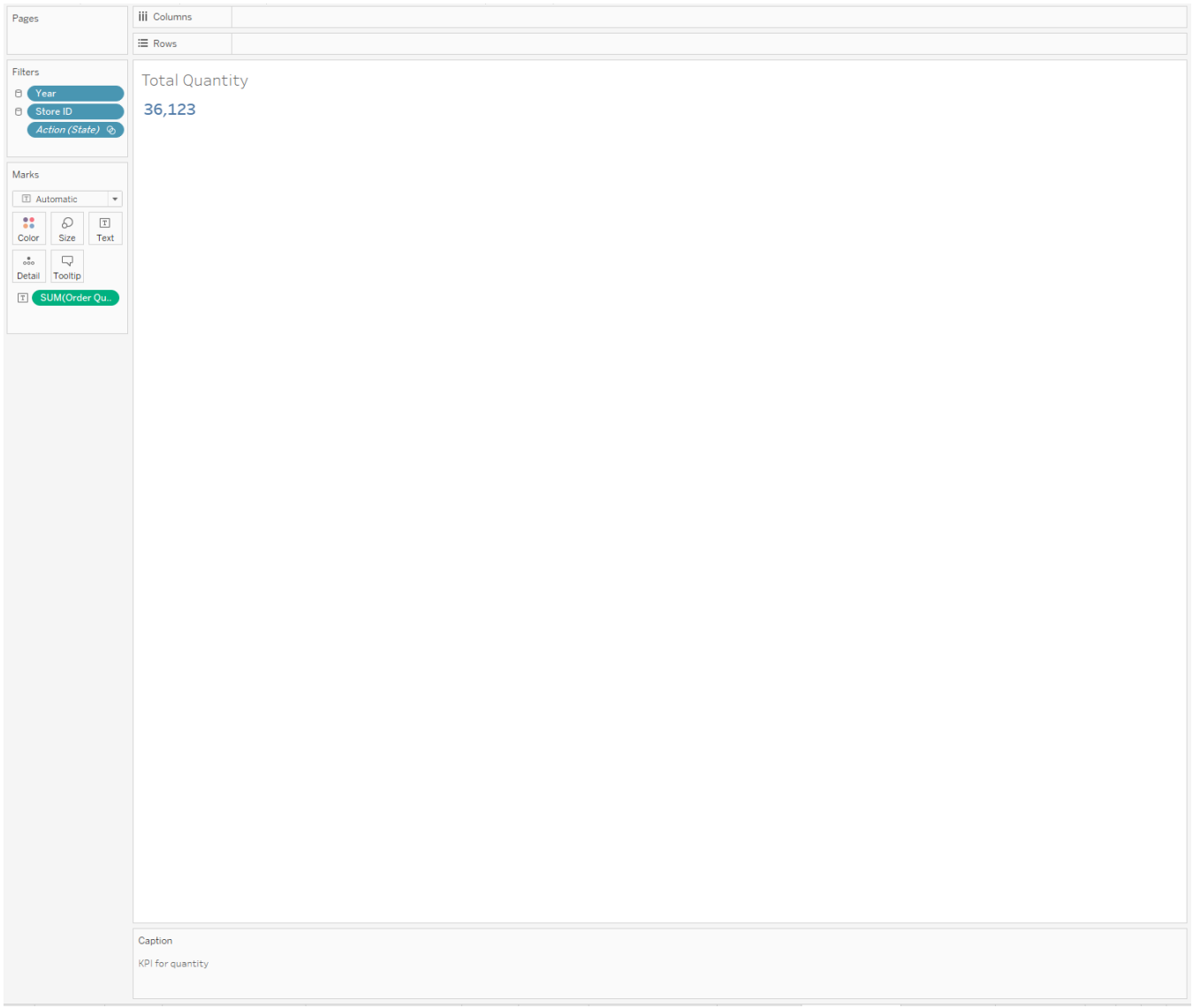

Pages
Columns
SUM(#Total order pri..
Rows
SUM(Population)
Filters
Year
Store ID
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Shape
SUM(Stores p..
#Store/City
ATTR(State)
SUM(Stores p..
Stores by Sales and Population [Kolten Safron]
Population
110M
100M
90M
80M
70M
60M
50M
40M
30M
20M
10M
0M
$0
$50,000
$100,000
$150,000
$200,000
$250,000
$300,000
$350,000
$400,000
$450,000
$500,000
Total Sales
Year
All Years
SUM(Stores per City)
1
3
Caption
Scatterplot
2 calculated fields (Total order price (sales), Store/City. Stores per city - includes LOD)
1 filter/parameter (year)
1 Color marks card (Stores per city)
1 detail
2 tooltip
Chart shows each store based on there total sales and population. Color is added to differentiate between the number of stores shared in the city. This is important as the more stores in a city, given its population, we would expect less sales.

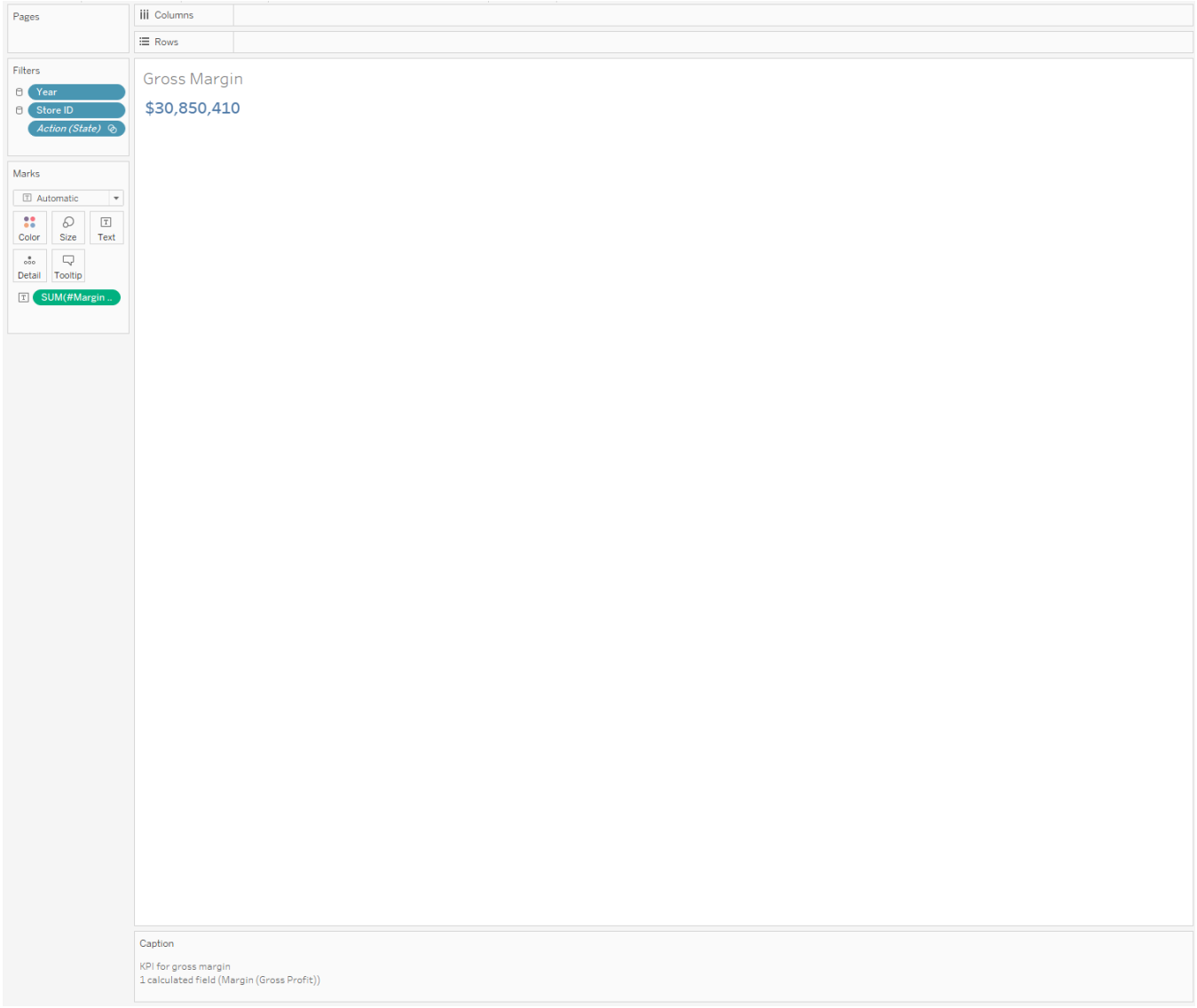

Pages
Columns
Longitude (generated)
Rows
Latitude (generated)
Filters
Year
Store ID
Marks
Automatic
Color
Size
Label
Detail
Tooltip
SUM(#Total or..
State
SUM(#Stores ..
AGG(#Sales p..
Map of Sales by State [Kolten Safron]
Total Sales
$114,630
17M
British Columbia
Alberta
Saskatchewan
Manitoba
Ontario
Quebec
Wyoming
United States
Mexico
Baja California
Sonora
Chihuahua
Coahuila de Zaragoza
Nuevo León
Tamaulipas
Sinaloa
Durango
Nayarit
Jalisco
Veracruz de Ignacio de la Llave
Guerrero
Oaxaca
Chiapas
Campeche
Yucatán
Cuba
© 2023 Mapbox © OpenStreetMap
Caption
Map
3 calculated fields (Total order price (sales), Stores per state - includes LOD, Sales per store - includes LOD)
1 color mark card
1 detail
2 tooltip
Map shows the sales by each state.

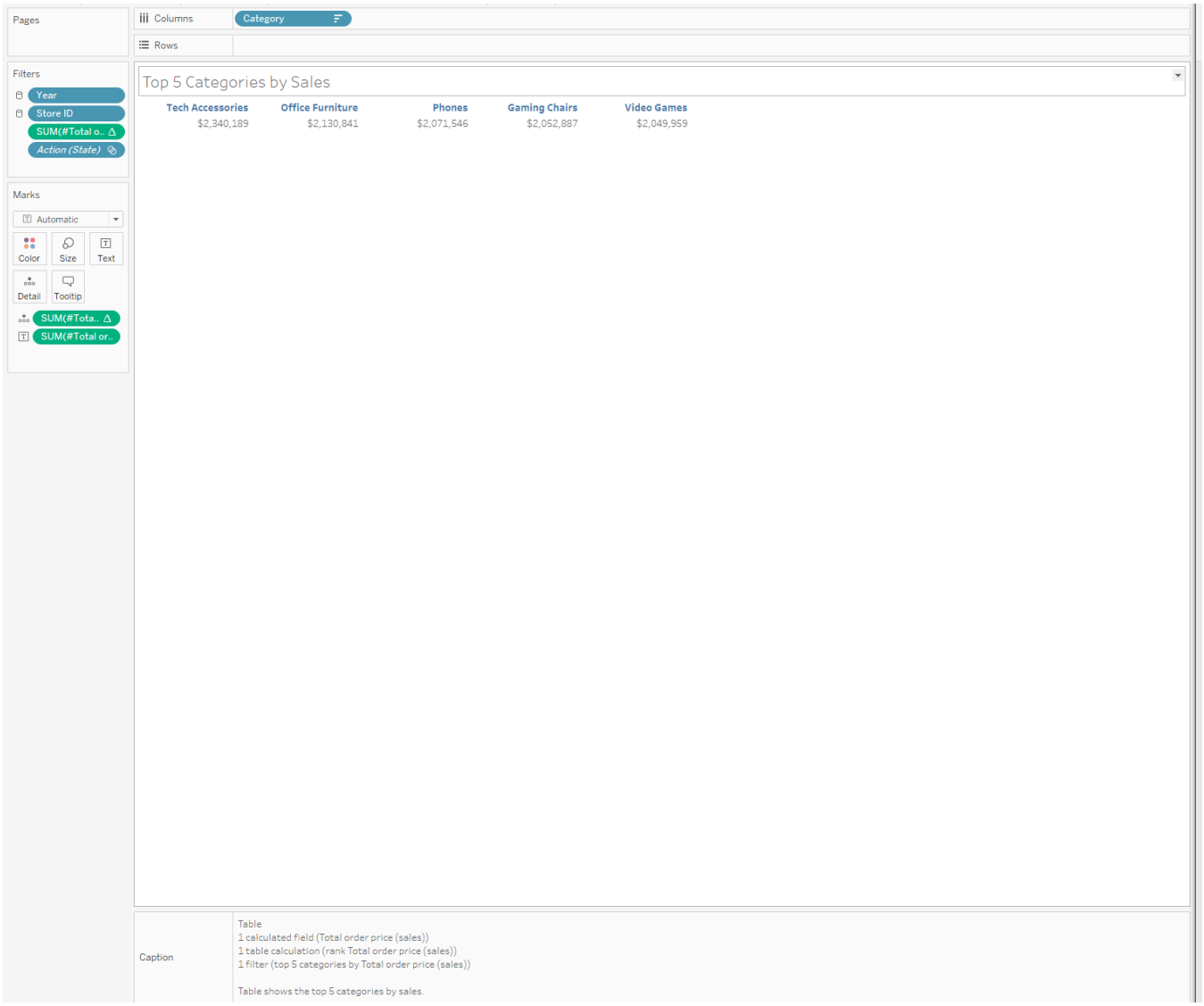
Dual Axis and Tables

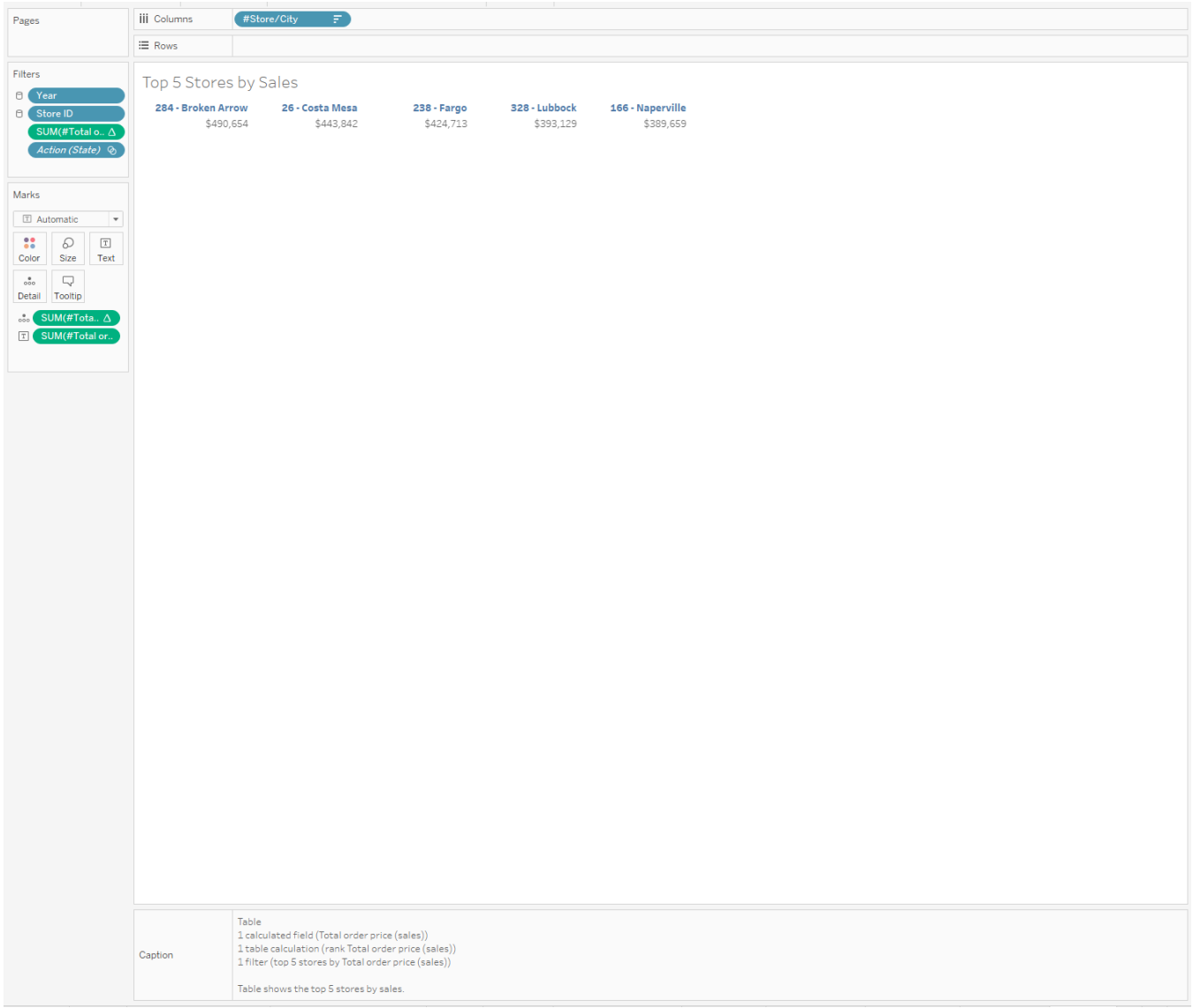

Pages
Columns
QUARTER(Order ..
Rows
SUM(#Margin (Gross..
SUM(#Total order pri..
Filters
Year
Store ID
Marks
All
Multiple
Color
Size
Label
Detail
Tooltip
Path
Measure Nam..
SUM(#Margin (...
SUM(#Total or...
Sales and Margin by Quarter (Store: All Stores) [Kolten Safron]
$8,500K
$8,000K
$7,500K
$7,000K
$6,500K
$6,000K
$5,500K
$5,000K
$4,500K
$4,000K
$3,500K
$3,000K
$2,500K
$2,000K
$1,500K
$1,000K
$500K
$0K
Total Sales and Gross Margin
2018 Q2
2018 Q3
2018 Q4
2019 Q1
2019 Q2
2019 Q3
2019 Q4
2020 Q1
2020 Q2
2020 Q3
2020 Q4
2021 Q1
Quarter
Measure Names
Gross Margin
Total Sales
Year
All Years
Store
All Stores
Caption
Dual axis
2 filter/parameters (year, store ID)
2 calculated fields (Margin (Gross Profit), Total order price (sales))
1 color mark card (measure names)
Chart shows the sales and gross margin by quarter.

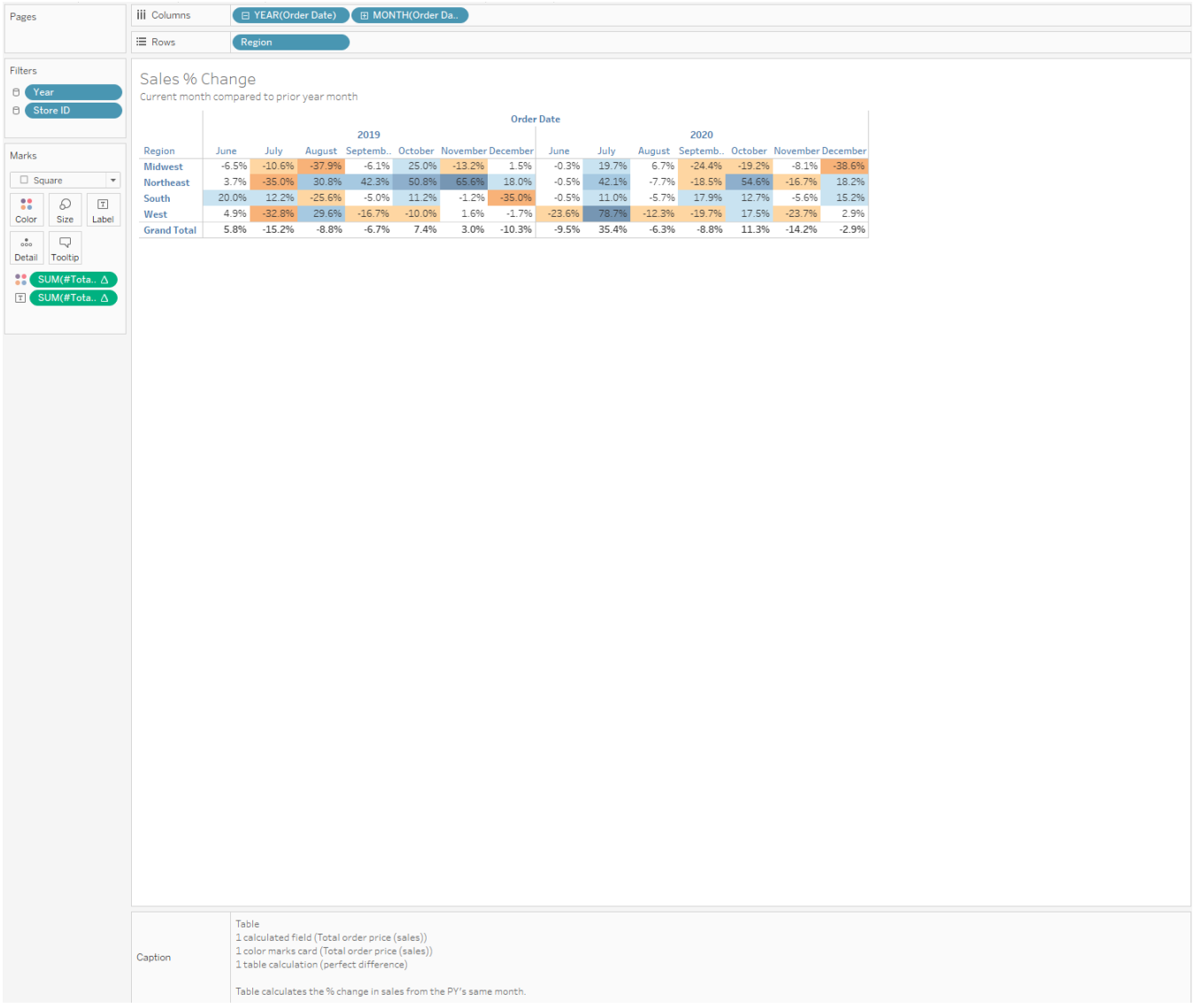

Pages
Columns
Rows
Filters
Year
Store ID
Action (State)
Marks
Automatic
Color
Size
Text
Detail
Tooltip
SUM(#Total or..
Total Sales
$82,617,097
Caption
KPI for sales
1 calculated field (Total order price (sales))


Pages
Columns
Rows
Filters
Year
Store ID
Action (State)
Marks
Automatic
Color
Size
Text
Detail
Tooltip
SUM(Order Qu..
Total Quantity
36,123
Caption
KPI for quantity


Pages
Columns
Rows
Filters
Year
Store ID
Action (State)
Marks
Automatic
Color
Size
Text
Detail
Tooltip
SUM(#Margin ..
Gross Margin
$30,850,410
Caption
KPI for gross margin
1 calculated field (Margin (Gross Profit))


Pages
Columns
Category
Rows
Filters
Year
Store ID
SUM(#Total o..
Action (State)
Marks
Automatic
Color
Size
Text
Detail
Tooltip
SUM(#Tota..
SUM(#Total or..
Top 5 Categories by Sales
Tech Accessories
$2,340,189
Office Furniture
$2,130,841
Phones
$2,071,546
Gaming Chairs
$2,052,887
Video Games
$2,049,959
Caption
Table
1 calculated field (Total order price (sales))
1 table calculation (rank Total order price (sales))
1 filter (top 5 categories by Total order price (sales))
Table shows the top 5 categories by sales.


Pages
Columns
#Store/City
Rows
Filters
Year
Store ID
SUM(#Total o..
Action (State)
Marks
Automatic
Color
Size
Text
Detail
Tooltip
SUM(#Tota..
SUM(#Total or..
Top 5 Stores by Sales
284 - Broken Arrow
$490,654
26 - Costa Mesa
$443,842
238 - Fargo
$424,713
328 - Lubbock
$393,129
166 - Naperville
$389,659
Caption
Table
1 calculated field (Total order price (sales))
1 table calculation (rank Total order price (sales))
1 filter (top 5 stores by Total order price (sales))
Table shows the top 5 stores by sales.



Caption

Table
1 calculated field (Total order price (sales))
1 color marks card (Total order price (sales))
1 table calculation (perfect difference)

Table calculates the % change in sales from the PY's same month.

Dashboards

Overall Sales Highlight

Total Sales	Gross Margin	Total Quantity
$82,617,097	$30,850,410	36,123

Top 5 Stores by Sales:	284 - Broken Arrow	26 - Costa Mesa	238 - Fargo	328 - Lubbock	166 - Naperville
	$490,654	$443,842	$424,713	$393,129	$389,659

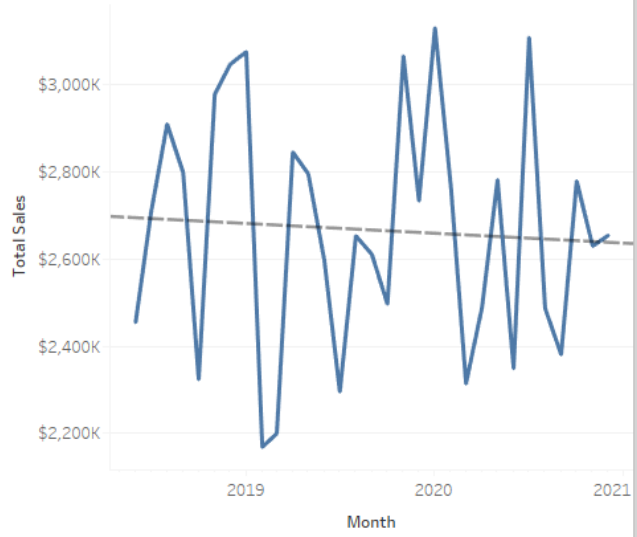
Top 5 Categories by Sales:	Tech Accessories	Office Furniture	Phones	Gaming Chairs	Video Games
	$2,340,189	$2,130,841	$2,071,546	$2,052,887	$2,049,959

Year: All Years

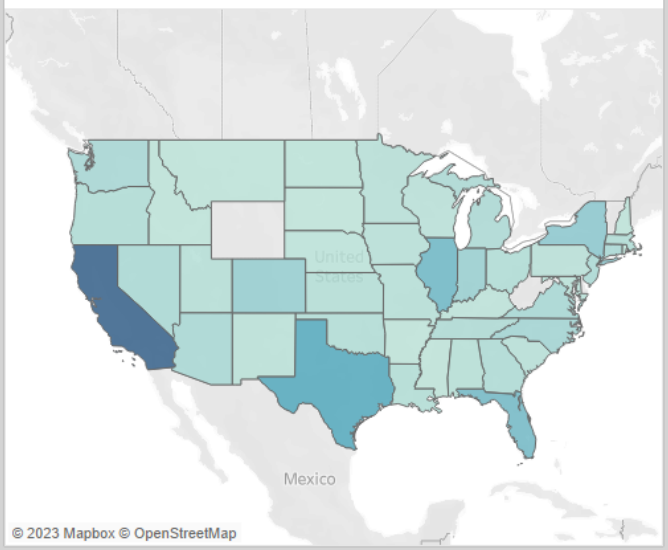
Store: All Stores

Total Sales: $114,630 — $17,283,447

Sales by Month (Store: All Stores) [Kolten Safron]



Map of Sales by State [Kolten Safron]



Detailed Analysis

Total Sales	Gross Margin	Total Quantity
$82,617,097	$30,850,410	36,123

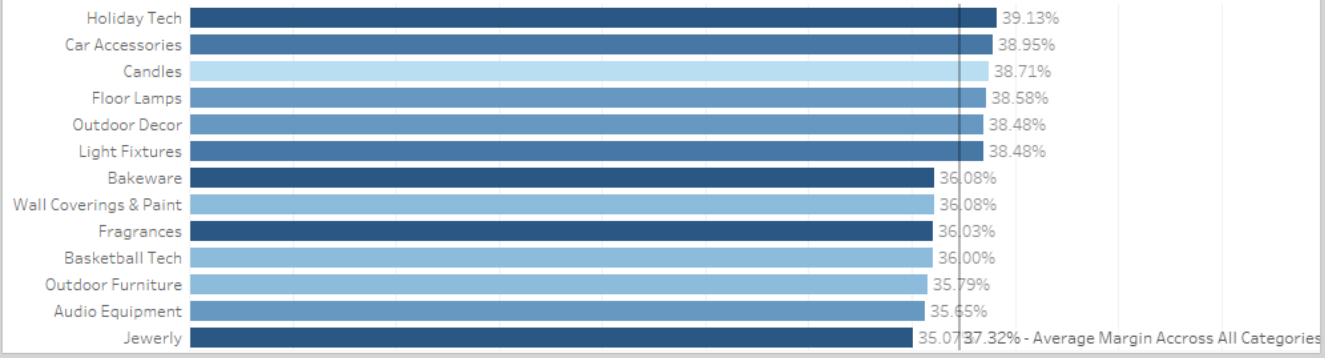
Order Quantity: 567 – 818

Year: All Years

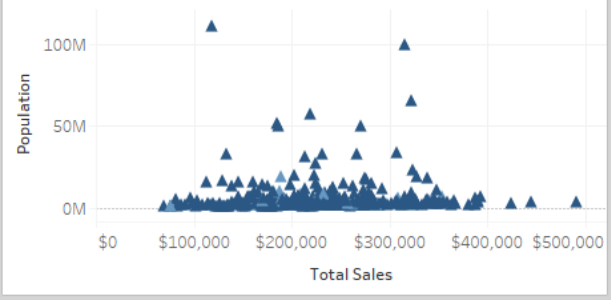
Store: All Stores

Gross Margin % by Category [Kolten Safron]

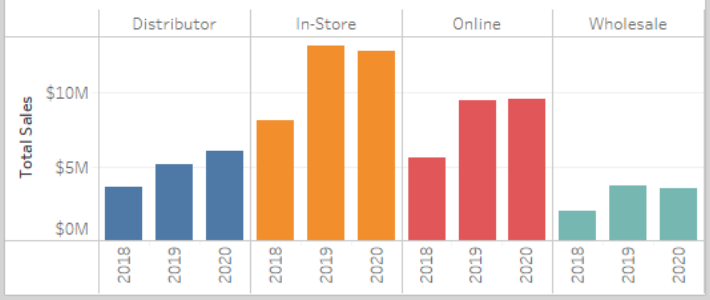
Any category +/- 1% of the average margin (37.32%)



Stores by Sales and Population [Kolten Safron]



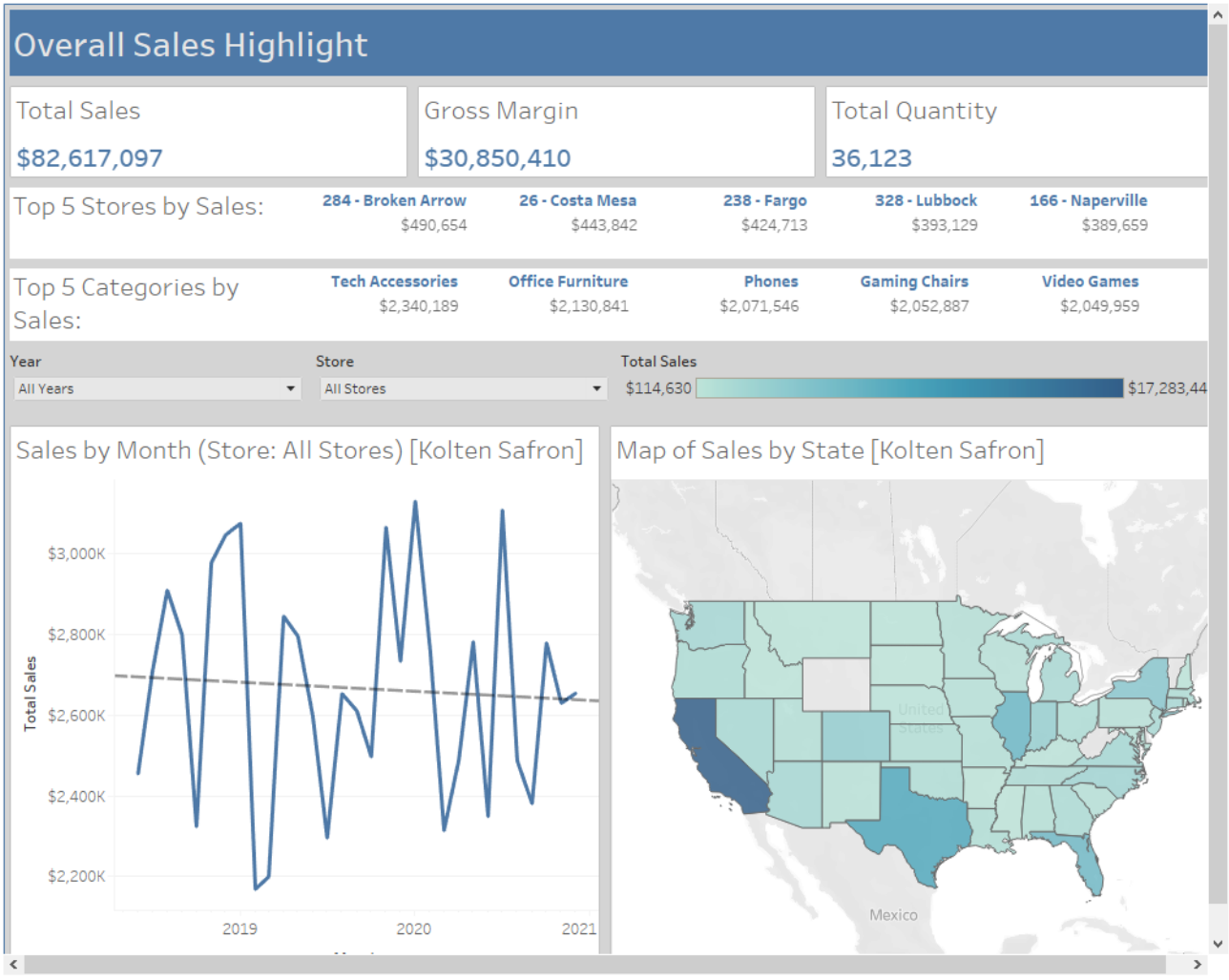
Sales by Channel (Store: All Stores) [Kolten Safron]



Storyboard

Provides some performance highlights. Includes overall metrics for total sales, gross margin, quantity, and top 5 stores and categories by sales. Also includes sales by month (including a trend line) as well as the sales by state. We can immediately note a couple things. 1) The total sales appear to be very cyclical/seasonal as it is spiking up and down frequently. 2) Sales appear to be stagnant. 3) Certain states (Ex. California, Texas) have significantly more sales then others. However, this is primarily due to the number of stores in those states, vs those stores outperforming the rest.

Looking into the cyclical sales more, we can cc change of sales. This is done to see if the char expect there to be small differences between see below this is not the case as there appear and grand total level). Some noteworthy obse regions. 2) In July 2019 and September 2020 a



s, gross margin, quantity, and top 5
d line) as well as the sales by state.
y cyclical/seasonal as it is spiking up
alifornia, Texas) have significantly
s in those states, vs those stores

Looking into the cyclical sales more, we can compare each years month to its prior year's month and calculate the change of sales. This is done to see if the change in revenue appears more seasonal, in which case we would expect there to be small differences between the current year and prior year same months. However, as we can see below this is not the case as there appears to be significant changes across the table (both at the region level and grand total level). Some noteworthy observations: 1) There was a large increase in July 2020 acrossall regions. 2) In July 2019 and September 2020 all regions except the South posted a decrease in sales, why did this happen? What did the South do differently to avoid this? 3) In October 2019 and 2020 3 regions had a increase in sales, where as 1 region had a decrease. What did the odd region out do differently? How can we avoid this? 4) Northeast region appears to be growing rapidly, having large increase in sales in multiple months. What are they doing that is being so successful?

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	Order Date													
	2019							2020						
Region	June	July	August	Septemb..	October	November	December	June	July	August	Septemb..	October	November	December
Midwest	-6.5%	-10.6%	-37.9%	-6.1%	25.0%	-13.2%	1.5%	-0.3%	19.7%	6.7%	-24.4%	-19.2%	-8.1%	-38.6%
Northeast	3.7%	-35.0%	30.8%	42.3%	50.8%	65.6%	18.0%	-0.5%	42.1%	-7.7%	-18.5%	54.6%	-16.7%	18.2%
South	20.0%	12.2%	-25.6%	-5.0%	11.2%	-1.2%	-35.0%	-0.5%	11.0%	-5.7%	17.9%	12.7%	-5.6%	15.2%
West	4.9%	-32.8%	29.6%	-16.7%	-10.0%	1.6%	-1.7%	-23.6%	78.7%	-12.3%	-19.7%	17.5%	-23.7%	2.9%
Grand Total	5.8%	-15.2%	-8.8%	-6.7%	7.4%	3.0%	-10.3%	-9.5%	35.4%	-6.3%	-8.8%	11.3%	-14.2%	-2.9%

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Moving over to a more detailed operationally detailed dashboard we have access to a 3 different charts. 1) Gross margin % by category, filtered to only show categories whose marign is +/- 1% of the average margin. From here we can see which categories are more profitable than others. Additionally, noted by the color we can see the quantity of sales. This chart is useful to identify strong product categories that we can push more or alternatively week categories we can look at how to improve the profitability. 2) Total Sales by Population and Store - This chart shows all stores based on their population and sales. Here we can identify stores that are underperforming for their potential market size (access to a large population but have lower sales). There are any outlier points. 3) Sales by Channel - This shows how each sales channel has been growing throughout the years. Most notable is that distributor channel is the only one that has had consistent growth, whereas the other 3 have been stagnant in 2020.

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Detailed Analysis

Total Sales	Gross Margin	Total Quantity
$82,617,097	$30,850,410	36,123

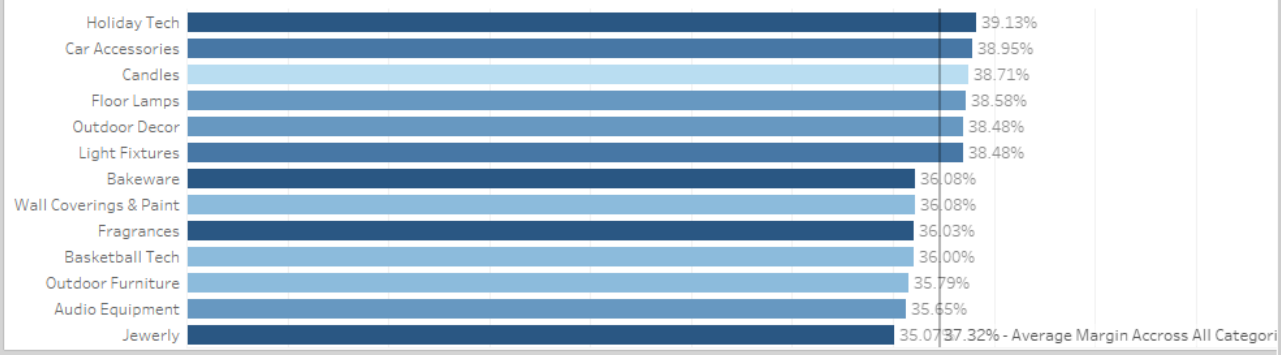
Order Quantity: 567 – 818

Year: All Years

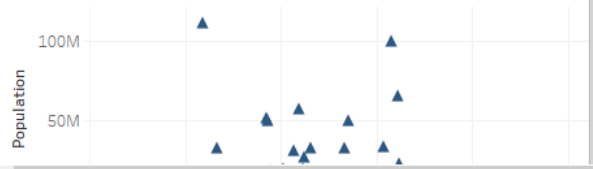
Store: All Stores

Gross Margin % by Category [Kolten Safron]

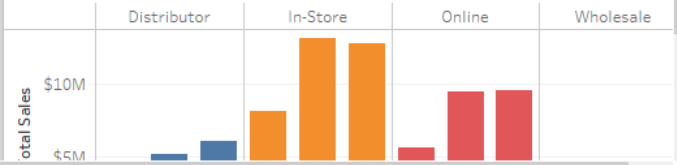
Any category +/- 1% of the average margin (37.32%)



Stores by Sales and Population [Kolten Safron]



Sales by Channel (Store: All Stores) [Kolten Safron]



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In conclusion, there is a variety of ways we can help improve the performance to prevent the stagnant sales. These include, looking at regional sales performances in certain months, margins on key categories, untapped potential in markets based on population, and sales channels. All of these need to be looked into further to derive the true actions however this provides a plan in the right direction.