

Task 3: Dashboard Design

Financial Analysis Dashboard

using:  Power BI

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Objective

Provide a one-page financial summary including sales, profit, and performance breakdown by segment, product, and geography using Power BI.



- **Track sales, profit, and units sold KPIs**
- **Identify top-performing countries, segments, and products**
- **Analyze monthly profit trends**
- **Enable interactive filtering through slicers**

Data Overview

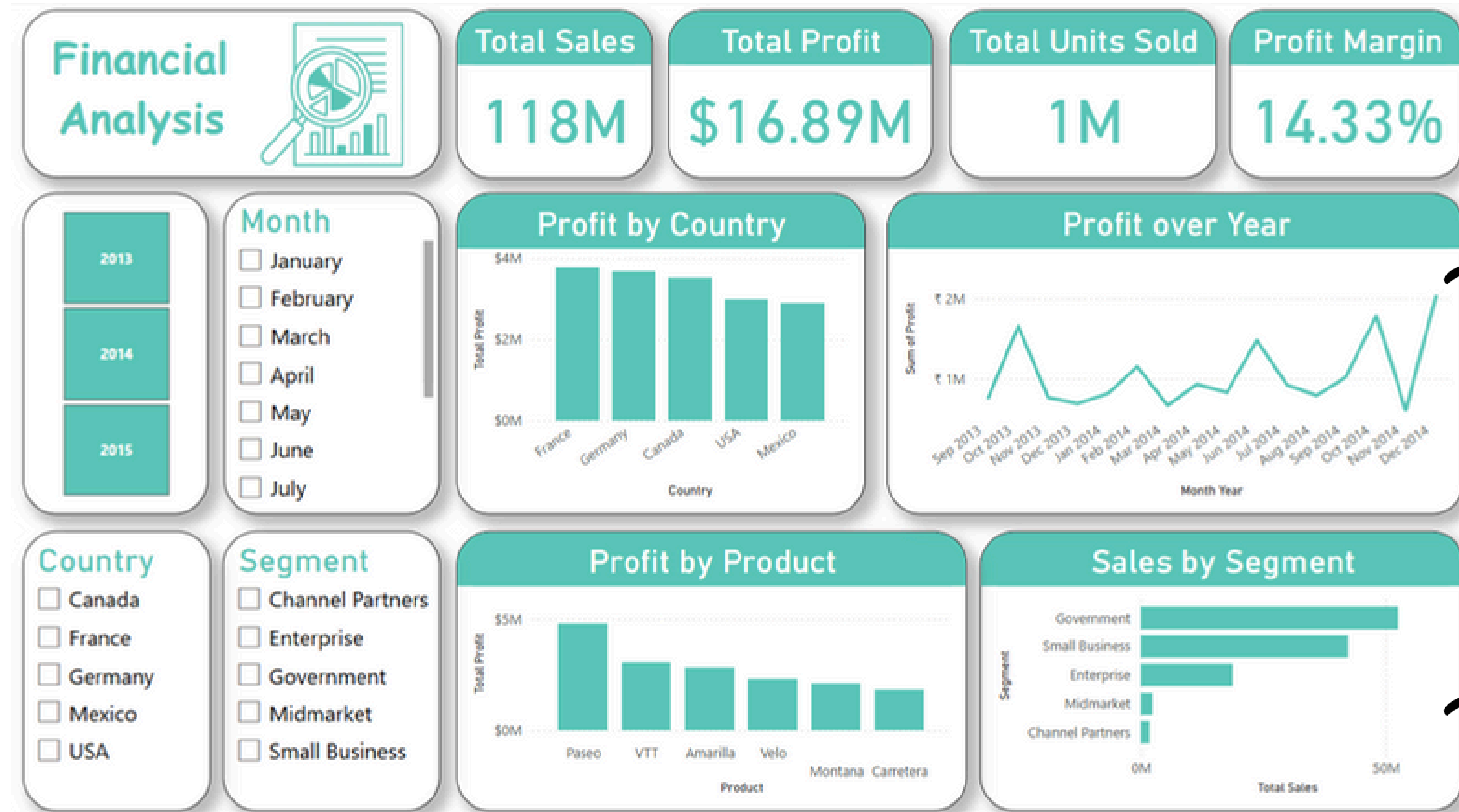
Dataset: Financials.csv



Segment	Country	Product	Discount Band	Units Sold	Manufacturing Price	Sale Price	Gross Sales	Discounts	Sales	COGS	Profit	Date	Month Number	Month Name	Year
Government	Canada	Carretera	None	\$1,618.50	\$3.00	\$20.00	\$32,370.00	\$-	\$32,370.00	\$16,185.00	\$16,185.00	01-01-2014	1	January	2014
Government	Germany	Carretera	None	\$1,321.00	\$3.00	\$20.00	\$26,420.00	\$-	\$26,420.00	\$13,210.00	\$13,210.00	01-01-2014	1	January	2014
Midmarket	France	Carretera	None	\$2,178.00	\$3.00	\$15.00	\$32,670.00	\$-	\$32,670.00	\$21,780.00	\$10,890.00	01-06-2014	6	June	2014
Midmarket	Germany	Carretera	None	\$888.00	\$3.00	\$15.00	\$13,320.00	\$-	\$13,320.00	\$8,880.00	\$4,440.00	01-06-2014	6	June	2014
Midmarket	Mexico	Carretera	None	\$2,470.00	\$3.00	\$15.00	\$37,050.00	\$-	\$37,050.00	\$24,700.00	\$12,350.00	01-06-2014	6	June	2014
Government	Germany	Carretera	None	\$1,513.00	\$3.00	\$350.00	\$5,29,550.00	\$-	\$5,29,550.00	\$3,93,380.00	\$1,36,170.00	01-12-2014	12	December	2014
Midmarket	Germany	Montana	None	\$921.00	\$5.00	\$15.00	\$13,815.00	\$-	\$13,815.00	\$9,210.00	\$4,605.00	01-03-2014	3	March	2014
Channel Partners	Canada	Montana	None	\$2,518.00	\$5.00	\$12.00	\$30,216.00	\$-	\$30,216.00	\$7,554.00	\$22,662.00	01-06-2014	6	June	2014
Government	France	Montana	None	\$1,899.00	\$5.00	\$20.00	\$37,980.00	\$-	\$37,980.00	\$18,990.00	\$18,990.00	01-06-2014	6	June	2014
Channel Partners	Germany	Montana	None	\$1,545.00	\$5.00	\$12.00	\$18,540.00	\$-	\$18,540.00	\$4,635.00	\$13,905.00	01-06-2014	6	June	2014
Midmarket	Mexico	Montana	None	\$2,470.00	\$5.00	\$15.00	\$37,050.00	\$-	\$37,050.00	\$24,700.00	\$12,350.00	01-06-2014	6	June	2014
Enterprise	Canada	Montana	None	\$2,665.50	\$5.00	\$125.00	\$3,33,187.50	\$-	\$3,33,187.50	\$3,19,860.00	\$13,327.50	01-07-2014	7	July	2014
Small Business	Mexico	Montana	None	\$958.00	\$5.00	\$300.00	\$2,87,400.00	\$-	\$2,87,400.00	\$2,39,500.00	\$47,900.00	01-08-2014	8	August	2014
Government	Germany	Montana	None	\$2,146.00	\$5.00	\$7.00	\$15,022.00	\$-	\$15,022.00	\$10,730.00	\$4,292.00	01-09-2014	9	September	2014
Enterprise	Canada	Montana	None	\$345.00	\$5.00	\$125.00	\$43,125.00	\$-	\$43,125.00	\$41,400.00	\$1,725.00	01-10-2013	10	October	2013
Midmarket	United States of America	Montana	None	\$615.00	\$5.00	\$15.00	\$9,225.00	\$-	\$9,225.00				12	December	2014
Government	Canada	Paseo	None	\$292.00	\$10.00	\$20.00	\$5,840.00	\$-	\$5,840.00				2	February	2014
Midmarket	Mexico	Paseo	None	\$974.00	\$10.00	\$15.00	\$14,610.00	\$-	\$14,610.00				2	February	2014
Channel Partners	Canada	Paseo	None	\$2,518.00	\$10.00	\$12.00	\$30,216.00	\$-	\$30,216.00				6	June	2014
Government	Germany	Paseo	None	\$1,006.00	\$10.00	\$350.00	\$3,52,100.00	\$-	\$3,52,100.00				6	June	2014
Channel Partners	Germany	Paseo	None	\$367.00	\$10.00	\$12.00	\$4,404.00	\$-	\$4,404.00				7	July	2014
Government	Mexico	Paseo	None	\$883.00	\$10.00	\$7.00	\$6,181.00	\$-	\$6,181.00				8	August	2014
Midmarket	France	Paseo	None	\$549.00	\$10.00	\$15.00	\$8,235.00	\$-	\$8,235.00				9	September	2013
Small Business	Mexico	Paseo	None	\$788.00	\$10.00	\$300.00	\$2,36,400.00	\$-	\$2,36,400.00				9	September	2013
Midmarket	Mexico	Paseo	None	\$2,472.00	\$10.00	\$15.00	\$37,080.00	\$-	\$37,080.00				9	September	2014
Government	United States of America	Paseo	None	\$1,143.00	\$10.00	\$7.00	\$8,001.00	\$-	\$8,001.00				10	October	2014
Government	Canada	Paseo	None	\$1,725.00	\$10.00	\$350.00	\$6,03,750.00	\$-	\$6,03,750.00				11	November	2013
Channel Partners	United States of America	Paseo	None	\$912.00	\$10.00	\$12.00	\$10,944.00	\$-	\$10,944.00				11	November	2013
Midmarket	Canada	Paseo	None	\$2,152.00	\$10.00	\$15.00	\$32,280.00	\$-	\$32,280.00				12	December	2013
Government	Canada	Paseo	None	\$1,817.00	\$10.00	\$20.00	\$36,340.00	\$-	\$36,340.00				12	December	2014
Government	Germany	Paseo	None	\$1,513.00	\$10.00	\$350.00	\$5,29,550.00	\$-	\$5,29,550.00				12	December	2014



Dashboard Overview



slicers

KPIs

Line chart

Bar charts

DAX Query & Logic



```
1 DataTable =
2 ADDCOLUMNS (
3     CALENDAR (DATE(2013, 1, 1), DATE(2015, 12, 31)),
4     "Year", YEAR([Date]),
5     "Month Number", MONTH([Date]),
6     "Month Name", FORMAT([Date], "MMM"),
7     "Month Year", FORMAT([Date], "MMM YYYY"),
8     "Quarter", "Q" & FORMAT([Date], "Q")
9 )
```

Date	Year	Month Number	Month Name	Month Year	Quarter	MonthYearIndex
01-01-2013 00:00:00	2013	1	January	Jan 2013	Q1	201301
02-01-2013 00:00:00	2013	1	January	Jan 2013	Q1	201301
03-01-2013 00:00:00	2013	1	January	Jan 2013	Q1	201301
04-01-2013 00:00:00	2013	1	January	Jan 2013	Q1	201301
05-01-2013 00:00:00	2013	1	January	Jan 2013	Q1	201301
06-01-2013 00:00:00	2013	1	January	Jan 2013	Q1	201301

1. Created a new DataTable
2. Created Relationship:
 - Linked DataTable[Date] to Financials[Date] with a one-to-many relationship
 - Used DataTable for Time-Aware Calculations
 - Used DataTable[Date] in functions like SAMEPERIODLASTYEAR to enable accurate YoY comparison.
3. Sorted Custom Month-Year
 - Created MonthYearIndex = YEAR(Date) × 100 + MONTH(Date) for chronological sorting.
 - Sorted MonthYear column by this index to ensure proper sequence across years.

```
Total Sales = SUM(Financials[Sales])
Total Profit = SUM(Financials[Profit])
Profit Margin % = DIVIDE([Total Profit], [Total Sales])
Sales LY = CALCULATE([Total Sales], SAMEPERIODLASTYEAR(DateTable[Date]))
Sales Growth % = DIVIDE([Total Sales] - [Sales LY], [Sales LY])
Profit LY = CALCULATE([Total Profit], SAMEPERIODLASTYEAR(DateTable[Date]))
Profit Growth % = DIVIDE([Total Profit] - [Profit LY], [Profit LY])
```

Insights & Takeaways

- **Government & Small Business = most profitable segments**
- **France and Germany = highest profit countries**
- **Paseo = top-selling product**
- **Profit spiked in Q4 2014**

*Thank
You*

