

Power BI Assignment 2 – DAX & Data Visualization

Dataset was imported, cleaned to remove errors and inconsistencies, transformed into the required structure, and subsequently loaded for analysis.

Queries [3]

- List of Orders
- Order Details
- Sales target

= Table.TransformColumnTypes(#"Removed Duplicates", {{"Order Date", type date}}, "en-GB")

	A ^B C Order ID	Order Date	A ^B C CustomerName	A ^B C State	A ^B C City
1	B-25601	4/1/2018	Bharat	Gujarat	Ahmedabad
2	B-25602	4/1/2018	Pearl	Maharashtra	Pune
3	B-25603	4/3/2018	Jahan	Madhya Pradesh	Bhopal
4	B-25604	4/3/2018	Divsha	Rajasthan	Jaipur
5	B-25605	4/5/2018	Kasheen	West Bengal	Kolkata
6	B-25606	4/6/2018	Hazel	Karnataka	Bangalore
7	B-25607	4/6/2018	Sonakshi	Jammu and Kashmir	Kashmir
8	B-25608	4/8/2018	Aarushi	Tamil Nadu	Chennai
9	B-25609	4/9/2018	Jitesh	Uttar Pradesh	Lucknow

Query Settings

PROPERTIES

Name: List of Orders
All Properties

APPLIED STEPS

- Source
- Change Type
- Promoted Headers
- Filtered Rows
- Removed Blank Rows
- Removed Duplicates
- Changed Type with Locale

Queries [3]

- List of Orders
- Order Details
- Sales target

= Table.SelectRows(#"Removed Blank Rows", each true)

	A ^B C Order ID	\$ Amount	1 ² 3 Profit	1 ² 3 Quantity	A ^B C Category	A ^B C Sub-Category
1	B-25601	1,275.00	-1148	13 distinct, 1 unique	7 Furniture	Bookcases
2	B-25601	66.00	-12	3 distinct, 0 unique	5 Clothing	Stole
3	B-25601	8.00	-2	3 distinct, 0 unique	3 Clothing	Hankerchief
4	B-25601	80.00	-56	4 distinct, 0 unique	4 Electronics	Electronic Games
5	B-25602	168.00	-111	2 distinct, 0 unique	2 Electronics	Phones
6	B-25602	424.00	-272	5 distinct, 0 unique	5 Electronics	Phones

Query Settings

PROPERTIES

Name: Order Details
All Properties

APPLIED STEPS

- Source
- Promoted Headers
- Changed Type
- Removed Duplicates
- Removed Blank Rows
- Filtered Rows

Queries [3]

- List of Orders
- Order Details
- Sales target

= Table.TransformColumnTypes(#"Use First Row as Headers",{{"Month of Order Date", type date}, {"Category", type text}, {"Target", type number}})

	A ^B C Month of Order Date	A ^B C Category	1 ² 3 Target
1	4/18/2026	Furniture	10400
2	5/18/2026	Furniture	10500
3	6/18/2026	Furniture	10600
4	7/18/2026	Furniture	10800

Query Settings

PROPERTIES

Name: Sales target
All Properties

APPLIED STEPS

- Source
- Use First Row as Headers
- Change Type

Calculated Columns:

1. Created a Calculated Column for 'Category Type' by combining the 'Category' and 'Sub-Category' columns in Order Details table.

The screenshot shows the Microsoft Power BI Data Editor interface. The top ribbon has tabs: File, Home, Help, Table tools, and Column tools (which is selected). The Column tools tab has several options: Name (set to 'Category Type'), Format (set to Text), Summarization (set to 'Don't summarize'), Data category (set to 'Uncategorized'), Sort by column, Data groups, Manage relationships, and New column. A yellow box highlights the formula bar where the formula `1 Category Type = 'Order Details'[Category] & " - " & 'Order Details'[Sub-Category]` is entered. Below the formula bar is a table with columns: Order ID, Amount, Profit, Quantity, Category, Sub-Category, and Category Type. The Category Type column contains values like 'Clothing - Saree'. To the right of the table is a Data pane showing the structure of the data, with 'Category Type' highlighted in red. The Data pane includes sections for List of Orders, Order Details (with a red box around it), Sales target, and Category.

Order ID	Amount	Profit	Quantity	Category	Sub-Category	Category Type
B-25602	\$561	212	3	Clothing	Saree	Clothing - Saree
B-25602	\$179	-5	8	Clothing	Saree	Clothing - Saree
B-25603	\$193	-166	3	Clothing	Saree	Clothing - Saree
B-25604	\$157	5	9	Clothing	Saree	Clothing - Saree
B-25605	\$75	0	7	Clothing	Saree	Clothing - Saree
B-25609	\$25	-5	4	Clothing	Saree	Clothing - Saree
B-25610	\$43	0	3	Clothing	Saree	Clothing - Saree
B-25611	\$160	-59	2	Clothing	Saree	Clothing - Saree
B-25613	\$1,603	0	9	Clothing	Saree	Clothing - Saree
B-25619	\$353	90	8	Clothing	Saree	Clothing - Saree
B-25622	\$534	0	3	Clothing	Saree	Clothing - Saree
B-25623	\$149	-87	4	Clothing	Saree	Clothing - Saree
B-25625	\$635	-349	5	Clothing	Saree	Clothing - Saree
B-25628	\$24	-9	4	Clothing	Saree	Clothing - Saree
B-25633	\$711	-8	4	Clothing	Saree	Clothing - Saree
B-25635	\$382	30	3	Clothing	Saree	Clothing - Saree
B-25636	\$637	113	5	Clothing	Saree	Clothing - Saree
B-25640	\$122	-47	4	Clothing	Saree	Clothing - Saree
R-25646	\$20	-8	2	Clothing	Saree	Clothing - Saree

2. Calculated Revenue per Order in Order Details table by computing the revenue as (Amount * Quantity).

The screenshot shows the Microsoft Power BI Data Editor interface. At the top, the ribbon has tabs: File, Home, Help, Table tools, Column tools (which is selected), and Share. The Column tools tab has several options: Name (Revenue), Format (Currency), Summarization (Sum), Sort by column, Data category (Uncategorized), Data groups, Manage relationships, and New column. Below these are Structure, Formatting, Properties, Sort, Groups, Relationships, and Calculations.

In the main area, there is a table with columns: Order ID, Amount, Profit, Quantity, Category, Sub-Category, Category Type, and Revenue. A yellow box highlights the formula bar above the table, which contains the formula: `1 Revenue = 'Order Details'[Amount] * 'Order Details'[Quantity]`. The Revenue column is highlighted with a red border. To the right of the table is a sidebar titled "Data" with a search bar and a tree view. The tree view shows "Order Details" expanded, with "Revenue" circled in red under the "Sub-Category" node.

Order ID	Amount	Profit	Quantity	Category	Sub-Category	Category Type	Revenue
B-25602	\$561	212	3	Clothing	Saree	Clothing - Saree	\$1,683
B-25602	\$119	-5	8	Clothing	Saree	Clothing - Saree	\$952
B-25603	\$193	-166	3	Clothing	Saree	Clothing - Saree	\$579
B-25604	\$157	5	9	Clothing	Saree	Clothing - Saree	\$1,413
B-25605	\$75	0	7	Clothing	Saree	Clothing - Saree	\$525
B-25609	\$25	-5	4	Clothing	Saree	Clothing - Saree	\$100
B-25610	\$43	0	3	Clothing	Saree	Clothing - Saree	\$129
B-25611	\$160	-59	2	Clothing	Saree	Clothing - Saree	\$320
B-25613	\$1,603	0	9	Clothing	Saree	Clothing - Saree	\$14,427
B-25619	\$353	90	8	Clothing	Saree	Clothing - Saree	\$2,824
B-25622	\$534	0	3	Clothing	Saree	Clothing - Saree	\$1,602
B-25623	\$149	-87	4	Clothing	Saree	Clothing - Saree	\$596
B-25625	\$635	-349	5	Clothing	Saree	Clothing - Saree	\$3,175
B-25628	\$24	-9	4	Clothing	Saree	Clothing - Saree	\$96
B-25633	\$711	-8	4	Clothing	Saree	Clothing - Saree	\$2,844
B-25635	\$382	30	3	Clothing	Saree	Clothing - Saree	\$1,146
B-25636	\$637	113	5	Clothing	Saree	Clothing - Saree	\$3,185

3. Created a Calculated Column to Categorize Sales as 'Sales Category' in the Order Details table that categorizes each order as 'Above Average' or 'Below Average' based on the Amount value.

The screenshot shows the Power BI Data View interface. At the top, there is a ribbon with tabs: Name, Format, Summarization, Data category, Sort by column, Data groups, Manage relationships, and New column. The 'New column' tab is selected. A yellow box highlights the formula bar which contains the DAX code: `1 Sales Category = IF('Order Details'[Amount] > AVERAGE('Order Details'[Amount]),"Above Average","Below Average")`. Below the ribbon is a table with columns: Order ID, Amount, Profit, Quantity, Category, Sub-Category, Category Type, Revenue, and Sales Category. The Sales Category column displays values like 'Above Average' and 'Below Average' corresponding to the formula. To the right of the table is a 'Data' pane with a search bar and a tree view of the data model. The 'Order Details' node is expanded, and under it, the 'Sales Category' column is circled in red.

Order ID	Amount	Profit	Quantity	Category	Sub-Category	Category Type	Revenue	Sales Category
B-25602	\$561	212	3	Clothing	Saree	Clothing - Saree	\$1,683	Above Average
B-25602	\$119	-5	8	Clothing	Saree	Clothing - Saree	\$952	Below Average
B-25603	\$193	-166	3	Clothing	Saree	Clothing - Saree	\$579	Below Average
B-25604	\$157	5	9	Clothing	Saree	Clothing - Saree	\$1,413	Below Average
B-25605	\$75	0	7	Clothing	Saree	Clothing - Saree	\$525	Below Average
B-25609	\$25	-5	4	Clothing	Saree	Clothing - Saree	\$100	Below Average
B-25610	\$43	0	3	Clothing	Saree	Clothing - Saree	\$129	Below Average
B-25611	\$160	-59	2	Clothing	Saree	Clothing - Saree	\$320	Below Average
B-25613	\$1,603	0	9	Clothing	Saree	Clothing - Saree	\$14,427	Above Average
B-25619	\$353	90	8	Clothing	Saree	Clothing - Saree	\$2,824	Above Average
B-25622	\$534	0	3	Clothing	Saree	Clothing - Saree	\$1,602	Above Average
B-25623	\$149	-87	4	Clothing	Saree	Clothing - Saree	\$596	Below Average
B-25625	\$635	-349	5	Clothing	Saree	Clothing - Saree	\$3,175	Above Average
B-25628	\$24	-9	4	Clothing	Saree	Clothing - Saree	\$96	Below Average
B-25633	\$711	-8	4	Clothing	Saree	Clothing - Saree	\$2,844	Above Average
B-25635	\$382	30	3	Clothing	Saree	Clothing - Saree	\$1,146	Above Average
B-25636	\$637	113	5	Clothing	Saree	Clothing - Saree	\$3,185	Above Average
B-25640	\$122	-47	4	Clothing	Saree	Clothing - Saree	\$488	Below Average
B-25646	\$20	-8	2	Clothing	Saree	Clothing - Saree	\$40	Below Average
B-25647	\$42	-6	4	Clothing	Saree	Clothing - Saree	\$168	Below Average
B-25648	\$55	-26	4	Clothing	Saree	Clothing - Saree	\$220	Below Average
B-25648	\$130	-41	4	Clothing	Saree	Clothing - Saree	\$520	Below Average
B-25650	\$211	-105	2	Clothing	Saree	Clothing - Saree	\$422	Below Average
B-25650	\$31	-2	2	Clothing	Saree	Clothing - Saree	\$62	Below Average
B-25650	\$512	-225	5	Clothing	Saree	Clothing - Saree	\$2,560	Above Average
B-25650	\$238	20	2	Clothing	Saree	Clothing - Saree	\$476	Below Average
B-25651	\$23	4	1	Clothing	Saree	Clothing - Saree	\$23	Below Average
B-25651	\$457	-41	4	Clothing	Saree	Clothing - Saree	\$1,828	Above Average
B-25652	\$206	-206	3	Clothing	Saree	Clothing - Saree	\$618	Below Average
B-25653	\$28	-3	2	Clothing	Saree	Clothing - Saree	\$56	Below Average
B-25654	\$229	-23	2	Clothing	Saree	Clothing - Saree	\$458	Below Average

Calculated Measures:

- The measure 'Order Count' was implemented to quantify the total number of orders recorded in the Order Details dataset.

Screenshot of Power BI Data Editor showing the creation and use of a calculated measure named 'Order Count'.

Measure Definition:

- Name: Order Count
- Home table: Order Details
- Format: Whole number
- Data category: Uncategorized
- Calculation: `1 Order Count = DISTINCTCOUNT('Order Details'[Order ID])`

Data View:

Order ID	Amount	Profit	Quantity	Category	Sub-Category	Category Type	Revenue	Sales Category
B-25602	\$561	212	3	Clothing	Saree	Clothing - Saree	\$1,683	Above Average
B-25602	\$119	-5	8	Clothing	Saree	Clothing - Saree	\$952	Below Average
B-25603	\$193	-166	3	Clothing	Saree	Clothing - Saree	\$579	Below Average
B-25604	\$157	5	9	Clothing	Saree	Clothing - Saree	\$1,413	Below Average
B-25605	\$75	0	7	Clothing	Saree	Clothing - Saree	\$525	Below Average
B-25609	\$25	-5	4	Clothing	Saree	Clothing - Saree	\$100	Below Average
B-25610	\$43	0	3	Clothing	Saree	Clothing - Saree	\$129	Below Average
B-25611	\$160	-59	2	Clothing	Saree	Clothing - Saree	\$320	Below Average
B-25613	\$1,603	0	9	Clothing	Saree	Clothing - Saree	\$14,427	Above Average
B-25619	\$353	90	8	Clothing	Saree	Clothing - Saree	\$2,824	Above Average
B-25622	\$534	0	3	Clothing	Saree	Clothing - Saree	\$1,602	Above Average
B-25623	\$149	-87	4	Clothing	Saree	Clothing - Saree	\$596	Below Average
B-25625	\$635	-349	5	Clothing	Saree	Clothing - Saree	\$3,175	Above Average
B-25628	\$24	-9	4	Clothing	Saree	Clothing - Saree	\$96	Below Average
B-25633	\$711	-8	4	Clothing	Saree	Clothing - Saree	\$2,844	Above Average
B-25635	\$382	30	3	Clothing	Saree	Clothing - Saree	\$1,146	Above Average
B-25636	\$637	113	5	Clothing	Saree	Clothing - Saree	\$3,185	Above Average
B-25640	\$122	-47	4	Clothing	Saree	Clothing - Saree	\$488	Below Average
B-25646	\$20	-8	2	Clothing	Saree	Clothing - Saree	\$40	Below Average
B-25647	\$42	-6	4	Clothing	Saree	Clothing - Saree	\$168	Below Average
B-25648	\$55	-26	4	Clothing	Saree	Clothing - Saree	\$220	Below Average
B-25648	\$130	-41	4	Clothing	Saree	Clothing - Saree	\$520	Below Average
B-25650	\$211	-105	2	Clothing	Saree	Clothing - Saree	\$422	Below Average
B-25650	\$31	-2	2	Clothing	Saree	Clothing - Saree	\$62	Below Average
B-25650	\$512	-225	5	Clothing	Saree	Clothing - Saree	\$2,560	Above Average
B-25650	\$238	20	2	Clothing	Saree	Clothing - Saree	\$476	Below Average
B-25651	\$23	4	1	Clothing	Saree	Clothing - Saree	\$23	Below Average
B-25651	\$457	-41	4	Clothing	Saree	Clothing - Saree	\$1,828	Above Average
B-25652	\$206	-206	3	Clothing	Saree	Clothing - Saree	\$618	Below Average

Power BI Data View:

- Search bar: Order Count
- List of measures:
 - Order ID
 - Profit
 - Quantity
 - Revenue
 - Sales Category
 - Sub-Category
 - Order Count (highlighted with a red circle)
 - Sales target

2. The measure 'Average Profit in Delhi' was created to compute the mean profit exclusively for orders placed in the city of Delhi.

The screenshot shows the Power BI Data View interface. At the top, there are tabs for Name, Format, Data category, New measure, Quick measure, and Calculations. The Name tab is active, showing the measure name 'Average Profit Delhi'. The Format tab shows '\$% Format' set to 'Whole number'. The Data category is 'Uncategorized'. The Calculations tab displays the DAX formula:

```
1 Average Profit Delhi = CALCULATE(AVERAGE('Order Details'[Profit]),'List of Orders'[City]:"Delhi")
```

The main area contains a table with columns: Order ID, Amount, Profit, Quantity, Category, Sub-Category, Category Type, Revenue, and Sales Category. The table data includes various order details such as Order ID B-25602 through B-25655, their respective amounts, profits, quantities, categories (Clothing or Saree), sub-categories (e.g., Clothing - Saree), category types, revenues, and sales categories (e.g., Above Average, Below Average).

On the right side, the Data pane is open, showing the hierarchy of measures. The 'Average Profit Delhi' measure is circled in red. Other measures listed include List of Orders, Order Date, Order ID, State, Order Details, Amount, Category, Category Type, Order Count, Order ID, Profit, Quantity, Revenue, Sales Category, Sub-Category, and Sales target.

3. A measure titled 'YTD Sales' was implemented to calculate the cumulative sales amount from the beginning of the year up to each order date.

The screenshot shows the Power BI Measures blade with the following details:

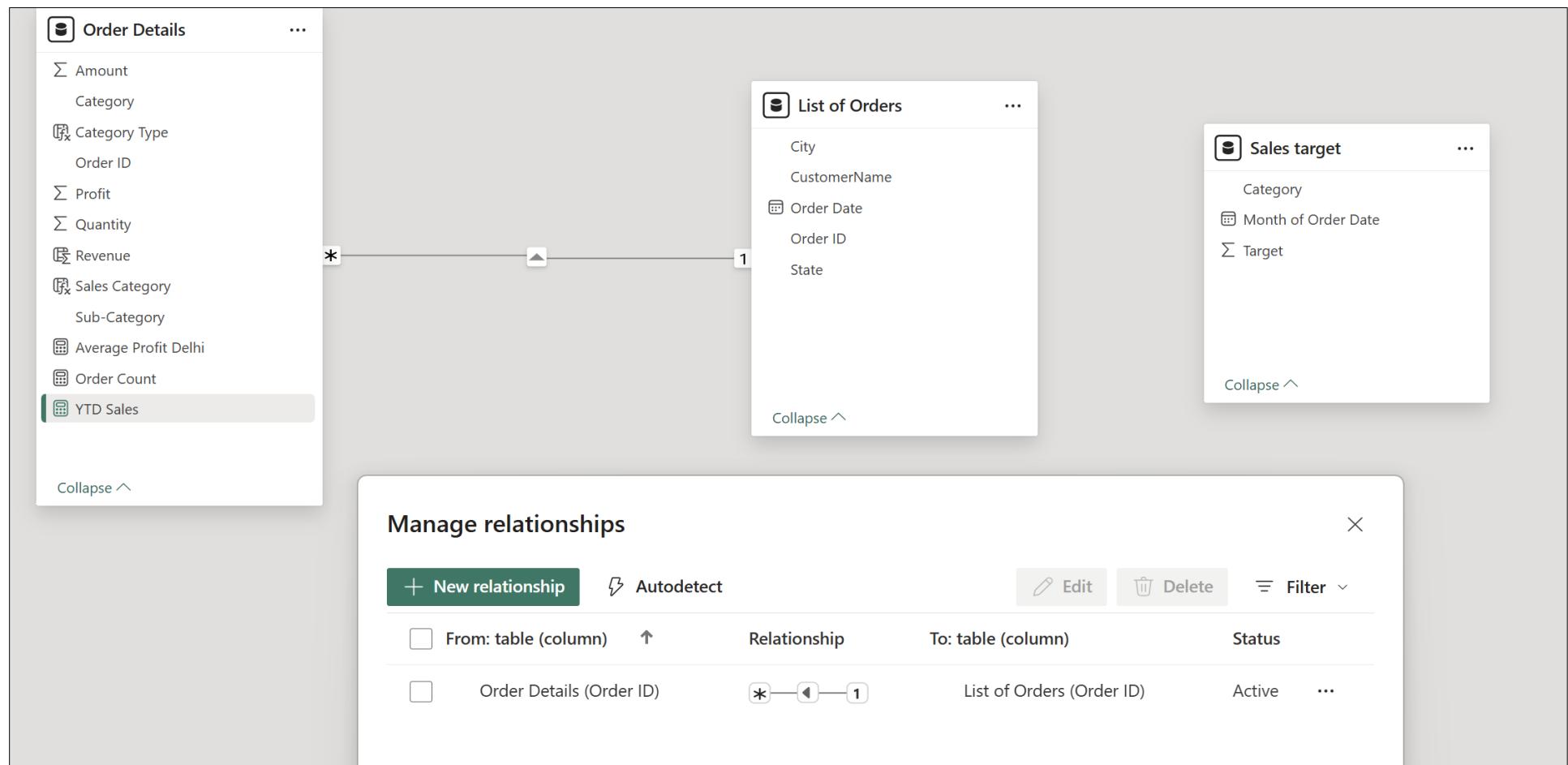
- Name:** YTD Sales
- Home table:** Order Details
- Format:** Currency
- Data category:** Uncategorized
- Measure definition:** `1 YTD Sales = TOTALYTD(SUM('Order Details'[Amount]), 'List of Orders'[Order Date])`
- Properties:** New measure
- Calculations:** Quick measure

The Data pane on the right lists the following measures and columns:

- Order Details** (selected)
 - Amount
 - Average Profit Delhi
 - Category
 - Category Type
 - Order ID
 - Order Count
 - Order Date
 - Profit
 - Quantity
 - Revenue
 - Sales Category
 - Sub-Category
 - YTD Sales (circled in red)
 - Sales target
- List of Orders**
 - City
 - CustomerName
 - State

Order ID	Amount	Profit	Quantity	Category	Sub-Category	Category Type	Revenue	Sales Category
B-25602	\$567	212	3	Clothing	Saree	Clothing - Saree	\$1,683	Above Average
B-25602	\$179	-5	8	Clothing	Saree	Clothing - Saree	\$952	Below Average
B-25603	\$193	-166	3	Clothing	Saree	Clothing - Saree	\$579	Below Average
B-25604	\$157	5	9	Clothing	Saree	Clothing - Saree	\$1,413	Below Average
B-25605	\$75	0	7	Clothing	Saree	Clothing - Saree	\$525	Below Average
B-25609	\$25	-5	4	Clothing	Saree	Clothing - Saree	\$700	Below Average
B-25610	\$43	0	3	Clothing	Saree	Clothing - Saree	\$129	Below Average
B-25611	\$160	-59	2	Clothing	Saree	Clothing - Saree	\$320	Below Average
B-25613	\$1,603	0	9	Clothing	Saree	Clothing - Saree	\$14,427	Above Average
B-25619	\$353	90	8	Clothing	Saree	Clothing - Saree	\$2,824	Above Average
B-25622	\$534	0	3	Clothing	Saree	Clothing - Saree	\$1,602	Above Average
B-25623	\$149	-87	4	Clothing	Saree	Clothing - Saree	\$596	Below Average
B-25625	\$635	-349	5	Clothing	Saree	Clothing - Saree	\$3,175	Above Average
B-25628	\$24	-9	4	Clothing	Saree	Clothing - Saree	\$96	Below Average
B-25633	\$711	-8	4	Clothing	Saree	Clothing - Saree	\$2,844	Above Average
B-25635	\$382	30	3	Clothing	Saree	Clothing - Saree	\$1,146	Above Average
B-25636	\$637	113	5	Clothing	Saree	Clothing - Saree	\$3,185	Above Average
B-25640	\$122	-47	4	Clothing	Saree	Clothing - Saree	\$488	Below Average
B-25646	\$20	-8	2	Clothing	Saree	Clothing - Saree	\$40	Below Average
B-25647	\$42	-6	4	Clothing	Saree	Clothing - Saree	\$168	Below Average
B-25648	\$55	-26	4	Clothing	Saree	Clothing - Saree	\$220	Below Average
B-25648	\$130	-41	4	Clothing	Saree	Clothing - Saree	\$520	Below Average
B-25650	\$211	-105	2	Clothing	Saree	Clothing - Saree	\$422	Below Average
B-25650	\$31	-2	2	Clothing	Saree	Clothing - Saree	\$62	Below Average
B-25650	\$512	-225	5	Clothing	Saree	Clothing - Saree	\$2,560	Above Average
B-25650	\$238	20	2	Clothing	Saree	Clothing - Saree	\$476	Below Average
B-25651	\$23	4	1	Clothing	Saree	Clothing - Saree	\$23	Below Average
B-25651	\$457	-41	4	Clothing	Saree	Clothing - Saree	\$1,828	Above Average
B-25652	\$206	-206	3	Clothing	Saree	Clothing - Saree	\$618	Below Average
B-25653	\$28	-3	2	Clothing	Saree	Clothing - Saree	\$56	Below Average
B-25654	\$229	-23	2	Clothing	Saree	Clothing - Saree	\$458	Below Average
B-25654	\$54	-3	3	Clothing	Saree	Clothing - Saree	\$162	Below Average
B-25655	\$706	27	0	Clothing	Saree	Clothing - Saree	\$2,564	Above Average

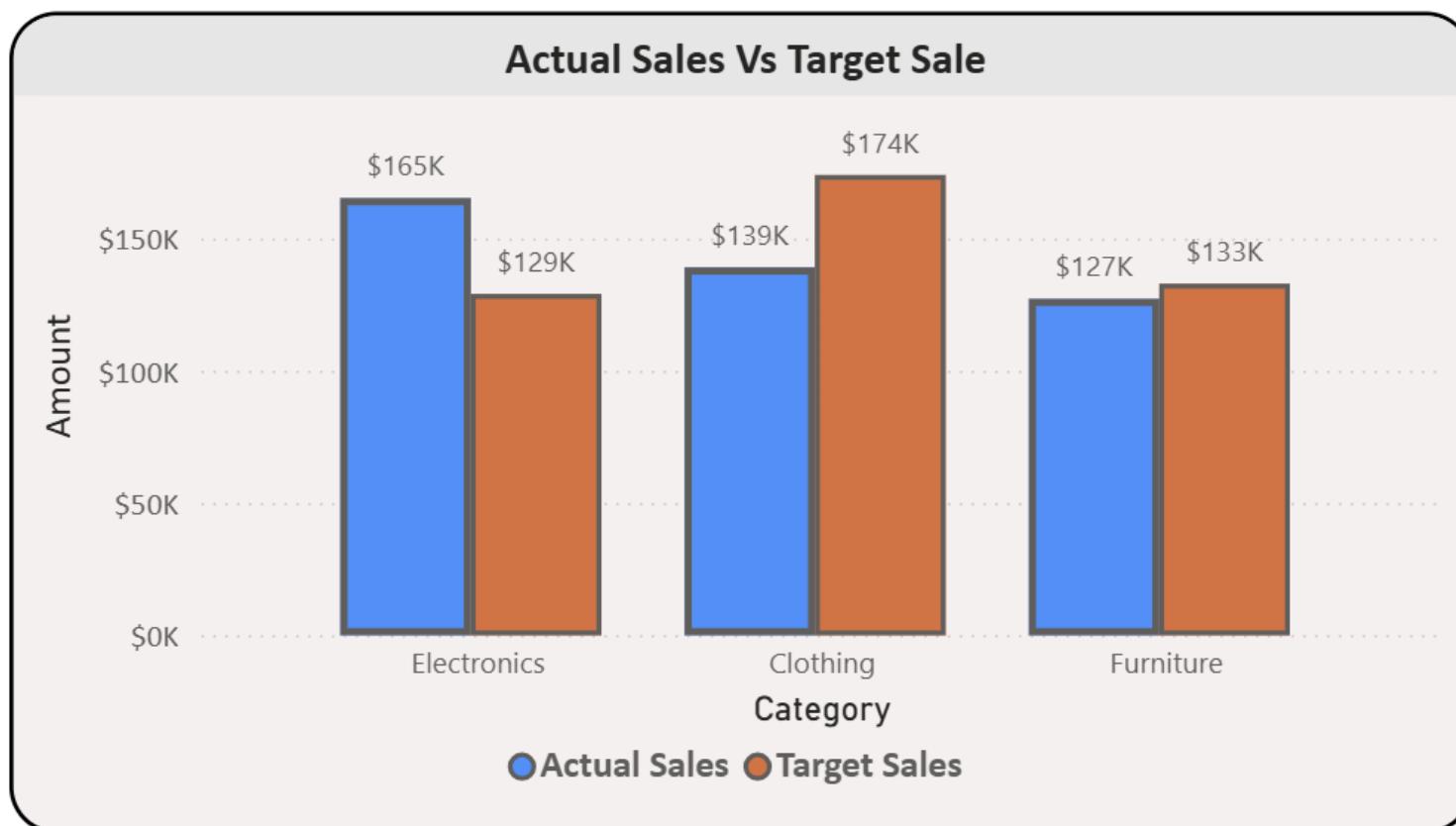
Data Model:



Data Visualization:

Sales Target Achievement by Category:

Compared actual sales with sales targets by category using a clustered column chart.



Visualizations »

Build visual

X-axis: Category

Y-axis: Actual Sales, Target Sales

Legend: Add data fields here

Small multiples: Add data fields here

Tooltips: Add data fields here

Drill through: Cross-report Off, Keep all filters On

Add drill-through fields here

Icon navigation: Home, Help, Search, Visualizations, Build visual, X-axis, Y-axis, Legend, Small multiples, Tooltips, Drill through, Cross-report, Keep all filters, Add drill-through fields here.

Columns

Apply settings to
Series
Actual Sales

Color
Color
Blue
Transparency
0 %

Border
Match fill color
Color
Black
Transparency
0 %

Columns

Apply settings to
Series
Target Sales

Color
Color
Orange
Transparency
0 %

Border
Match fill color
Color
Black
Transparency
0 %

Visual General ...

Title On

Title
Text
Actual Sales Vs Target Sale
fx

Heading
Heading 2

Font
Calibri
14

B **I** **U**

Text color
Black
fx

Background color
Light Gray
fx

Horizontal alignment
Left
Center
Right

Text wrap
On

Visual General ...

Properties

Title On

Effects

Background On
Color
White
fx

Transparency
22 %

Visual border On
Color
Black
fx

Rounded corners
20 px

Width
2 px

Max Profit Margin by Sub-Category:

Analyze the maximum profit margin for each sub-category of products using a donut chart.

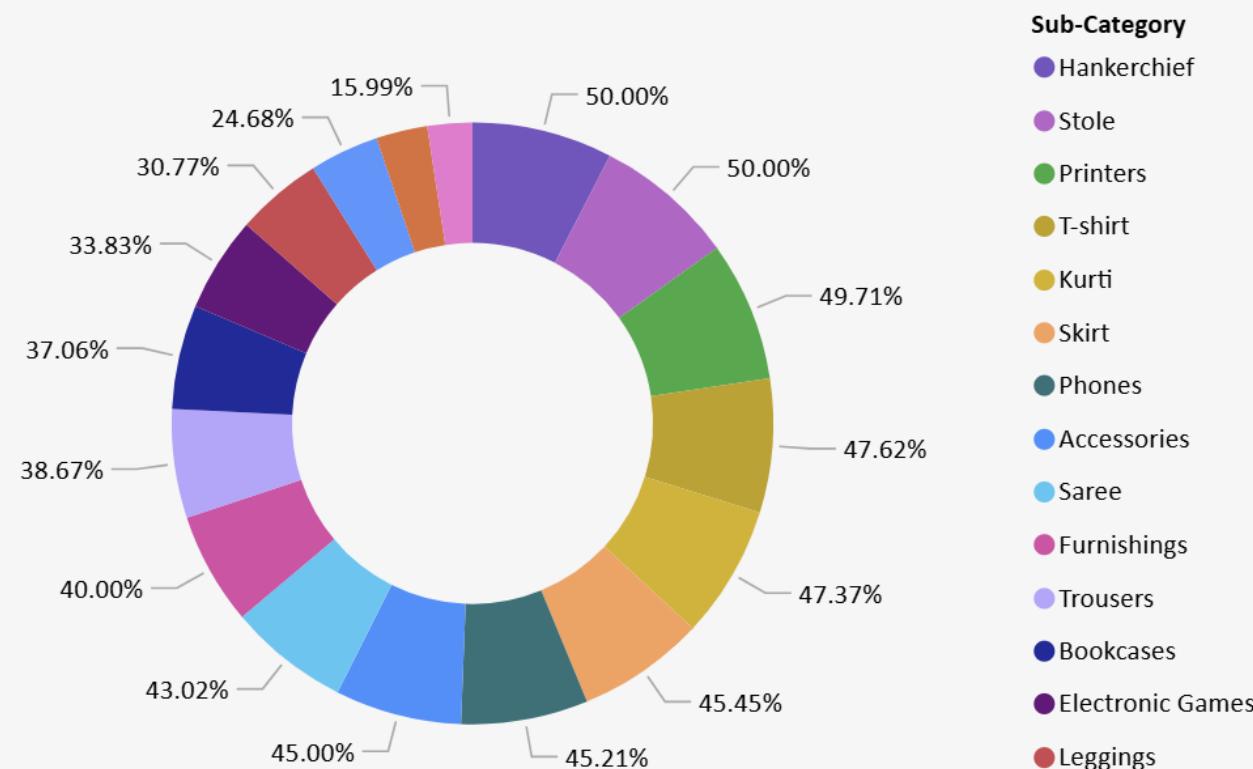
Screenshot of Power BI Data Editor showing the creation of a calculated column named "Profit Margin".

The calculated column formula is: `1 Profit Margin = DIVIDE('Order Details'[Profit], 'Order Details'[Revenue],0)`

The table displays the following data:

Order ID	Amount	Profit	Quantity	Category	Sub-Category	Category Type	Revenue	Sales Category	Profit Margin
B-25602	\$561	212	3	Clothing	Saree	Clothing - Saree	\$1,683	Above Average	12.60%
B-25602	\$119	-5	8	Clothing	Saree	Clothing - Saree	\$952	Below Average	-0.53%
B-25603	\$193	-166	3	Clothing	Saree	Clothing - Saree	\$579	Below Average	-28.67%
B-25604	\$157	5	9	Clothing	Saree	Clothing - Saree	\$1,413	Below Average	0.35%
B-25605	\$75	0	7	Clothing	Saree	Clothing - Saree	\$525	Below Average	0.00%
B-25609	\$25	-5	4	Clothing	Saree	Clothing - Saree	\$100	Below Average	-5.00%
B-25610	\$43	0	3	Clothing	Saree	Clothing - Saree	\$129	Below Average	0.00%
B-25611	\$160	-59	2	Clothing	Saree	Clothing - Saree	\$320	Below Average	-18.44%
B-25613	\$1,603	0	9	Clothing	Saree	Clothing - Saree	\$14,427	Above Average	0.00%

Maximum Margin by Sub-Category



Legend

Sub-Category X

Values

Max of Profit Margin X

Details

Add data fields here

Tooltips

Add data fields here

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

Visual General ...

Legend

Options

Position
Center right

Text

Font
Calibri 10
B **I** **U**

Color

Title

Title text
Sub-Category

Reset to default

Visual General ...

Detail labels

Options

Position
Outside

Overflow text

Label contents
Data value

Values

Font
Calibri 10
B **I** **U**

Color

Background
Auto

Display units
Auto

Value decimal places
Auto

Visual **General** ...

Title

Text
Maximum Margin by Sub-C...

Heading
Heading 3

Font
Calibri 14
B **I** **U**

Text color

Background color

Horizontal alignment

Text wrap

Subtitle

Divider

Visual **General** ...

Effects

Background

Color

Transparency
9 %

Visual border

Color

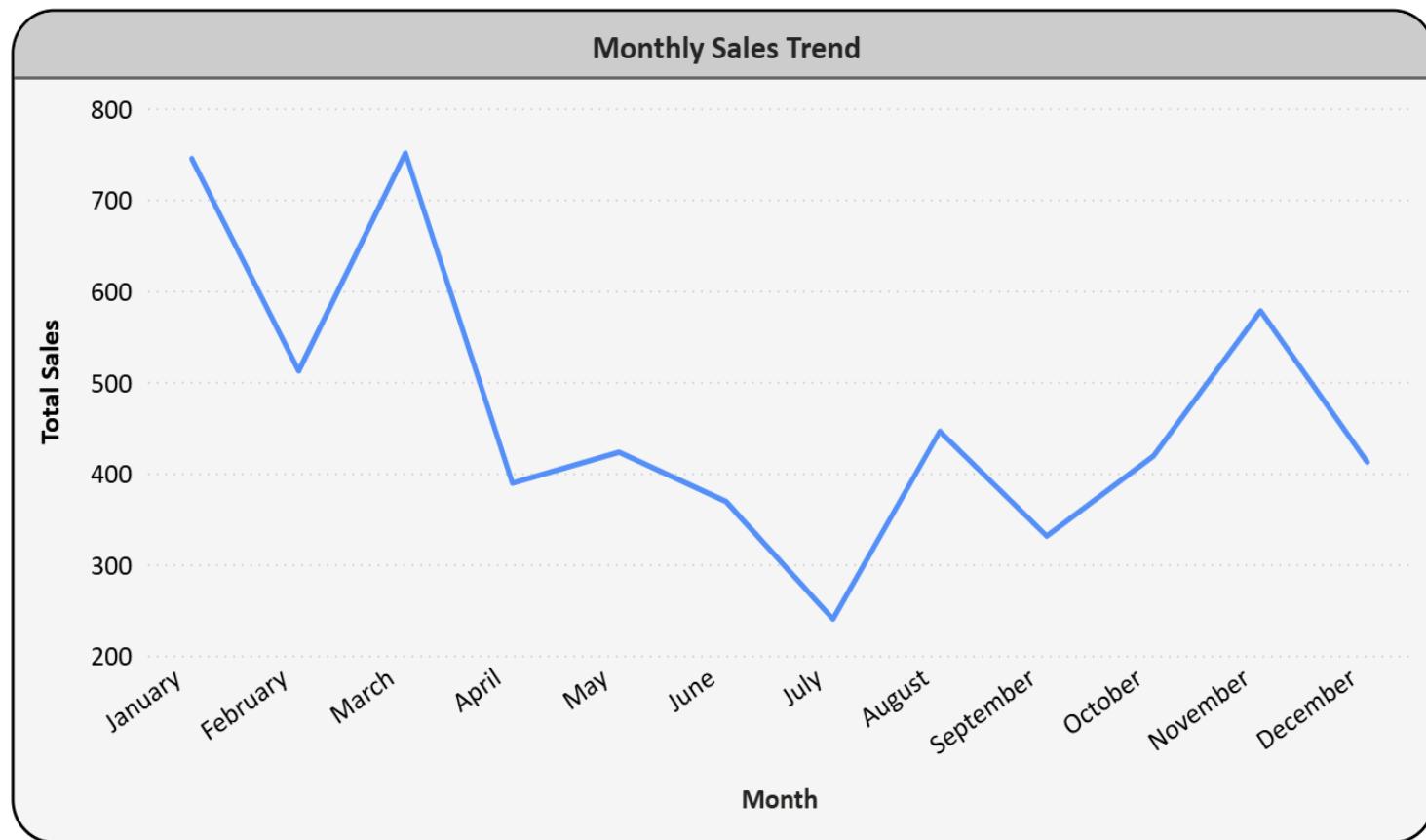
Rounded corners
15 px

Width
2 px

Monthly Sales Trend:

Show the trend of monthly sales over time using a line chart.

The line chart illustrates the monthly sales trend, with months displayed along the X-axis and the total number of items sold plotted on the Y-axis. It highlights how sales volumes fluctuate across different months, making seasonal patterns and performance shifts easy to observe.



X-axis

Order Date

Month

Y-axis

Total Sales

Secondary y-axis

Add data fields here

Legend

Add data fields here

Small multiples

Add data fields here

Tooltips

Add data fields here

Drill through

Cross-report off

Keep all filters off

The image shows a user interface for configuring chart elements across four main sections: X-axis, Y-axis, Visual, and General.

X-axis:

- Values:** Font set to Calibri, 12pt. Style buttons (B, I, U) are available. Color is black. Maximum height is 25%.
- Title:** Title text is "Auto". Style is "Show title only". Font is Calibri, 12pt. Color is black.

Y-axis:

- Range:** Minimum is set to "Auto". Maximum is set to "Auto". Logarithmic scale and Invert range options are off.
- Values:** Font set to Calibri, 12pt. Style buttons (B, I, U) are available. Color is black.
- Title:** Title text is "Total Sales". Style is "Show title only". Font is Calibri, 12pt. Color is black.

Visual:

- Title:** Text is "Monthly Sales Trend". Heading is "Heading 2". Font is Calibri, 14pt. Style buttons (B, I, U) are available. Text color is black. Background color is light gray. Horizontal alignment is left. Text wrap is on.

General:

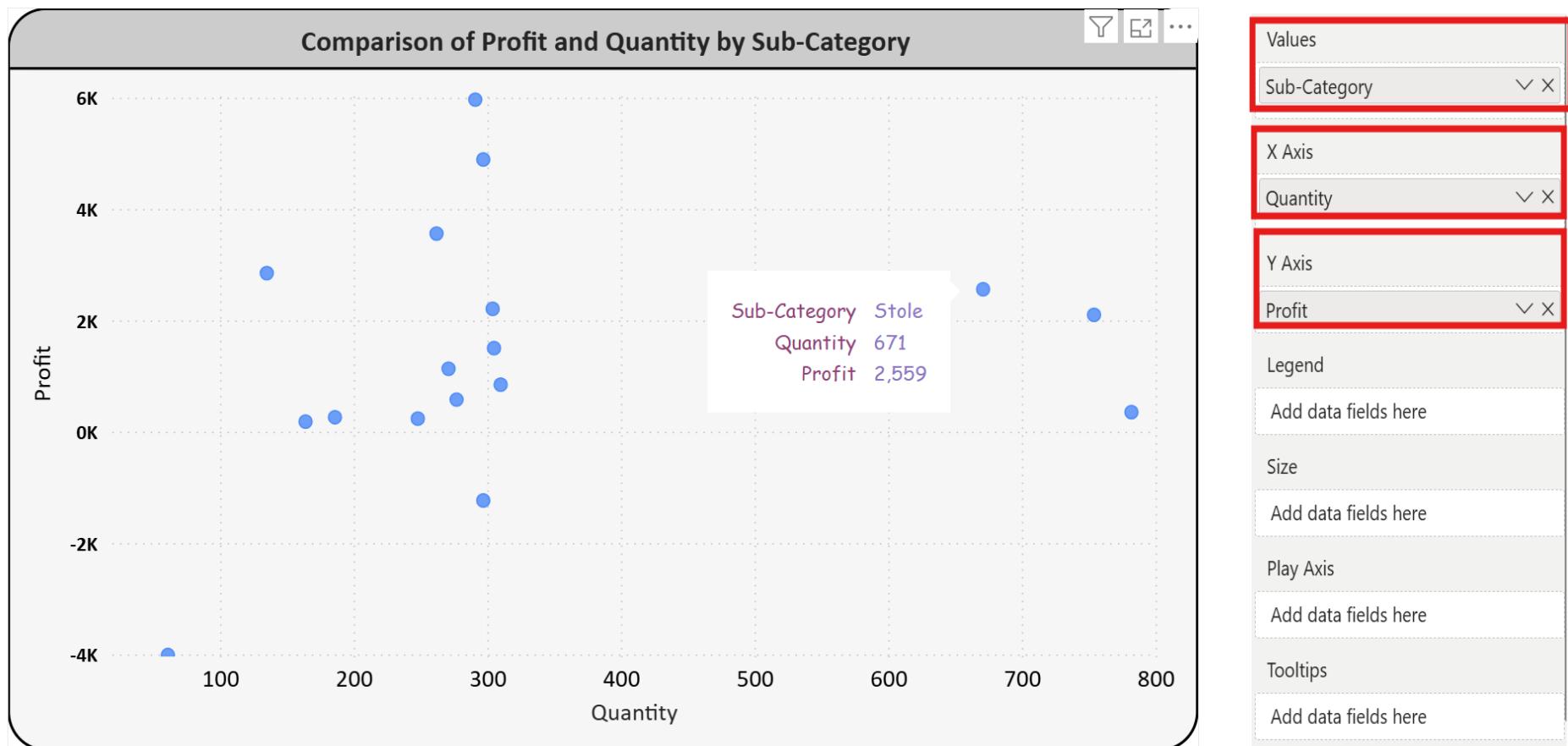
- Title:** Title is "On".
- Effects:**

 - Background:** Color is black. Transparency is 0%.
 - Visual border:** Color is black. Rounded corners are 25px. Width is 2px. Shadow is off.

Comparison of Profit and Quantity by Sub-Category:

Compare the relationship between profit and quantity sold for different sub-categories using a scatter chart.

This scatter chart compares profit against quantity sold across different sub-categories. Each point represents a sub-category, with the X-axis showing the quantity sold and the Y-axis showing the profit. The chart helps identify whether higher sales volumes are associated with higher profitability, and highlights sub-categories that are either high-volume but low-profit or low-volume but high-profit.



Comparison of Total Sales Amount and Target:

Create cards to succinctly display the total sales amount alongside the sales target for quick comparison and analysis. Also, create a multi-row card to display the minimum target for each segment.

\$431.502K
Total Sales

\$435.9K
Total Target

Sales and Target By Segment		
Clothing Category	Sub-Category	Min Target
Clothing Category	Hankerchief Sub-Category	12000 Min Target
Clothing Category	Kurti Sub-Category	12000 Min Target
Clothing Category	Leggings Sub-Category	12000 Min Target
Clothing Category	Saree Sub-Category	12000 Min Target
Clothing Category	Shirt Sub-Category	12000 Min Target
...		

Value
Total Sales

Value
Total Target

Fields
Category
Sub-Category
Min Target

Category labels

Font
Calibri 12
B **I** **U**

Color

Reset to default

Cards

Title

Style

Accent bar

Color

Width
5

Reset to default

Outline color

Cards

Title

Style

Accent bar

Color

Width
5

Reset to default

Title

Text
Sales and Target By Segmen

Heading
Heading 3

Font
Calibri 14
B **I** **U**

Text color

Background color

Horizontal alignment

Text wrap

Subtitle

Divider

Color

Line style
Solid

Effects

Background

Color

Transparency
0 %

Visual border

Color

Rounded corners
5 px

Width
1 px

Shadow

Sales Performance Matrix:

Build a matrix view to analyze how actual sales compare to sales targets across different categories and months.

Category	Clothing		Electronics		Furniture		Total	
Month	Target Sales	Actual Sales						
January	\$16,000	\$139,054	\$16,000	\$165,267	\$11,500	\$127,181	\$43,500	\$431,502
February	\$16,000	\$139,054	\$16,000	\$165,267	\$11,600	\$127,181	\$43,600	\$431,502
March	\$16,000	\$139,054	\$16,000	\$165,267	\$11,800	\$127,181	\$43,800	\$431,502
April	\$12,000	\$139,054	\$9,000	\$165,267	\$10,400	\$127,181	\$31,400	\$431,502
May	\$12,000	\$139,054	\$9,000	\$165,267	\$10,500	\$127,181	\$31,500	\$431,502
June	\$12,000	\$139,054	\$9,000	\$165,267	\$10,600	\$127,181	\$31,600	\$431,502
July	\$14,000	\$139,054	\$9,000	\$165,267	\$10,800	\$127,181	\$33,800	\$431,502
August	\$14,000	\$139,054	\$9,000	\$165,267	\$10,900	\$127,181	\$33,900	\$431,502
September	\$14,000	\$139,054	\$9,000	\$165,267	\$11,000	\$127,181	\$34,000	\$431,502
October	\$16,000	\$139,054	\$9,000	\$165,267	\$11,100	\$127,181	\$36,100	\$431,502
November	\$16,000	\$139,054	\$9,000	\$165,267	\$11,300	\$127,181	\$36,300	\$431,502
December	\$16,000	\$139,054	\$9,000	\$165,267	\$11,400	\$127,181	\$36,400	\$431,502
Total	\$174,000	\$139,054	\$129,000	\$165,267	\$132,900	\$127,181	\$435,900	\$431,502

Rows

Month of Order Date ▼ X

Month X

Columns

Category ▼ X

Values

Target Sales ▼ X

Actual Sales ▼ X

Drill through

Cross-report Off

Keep all filters On

Add drill-through fields here

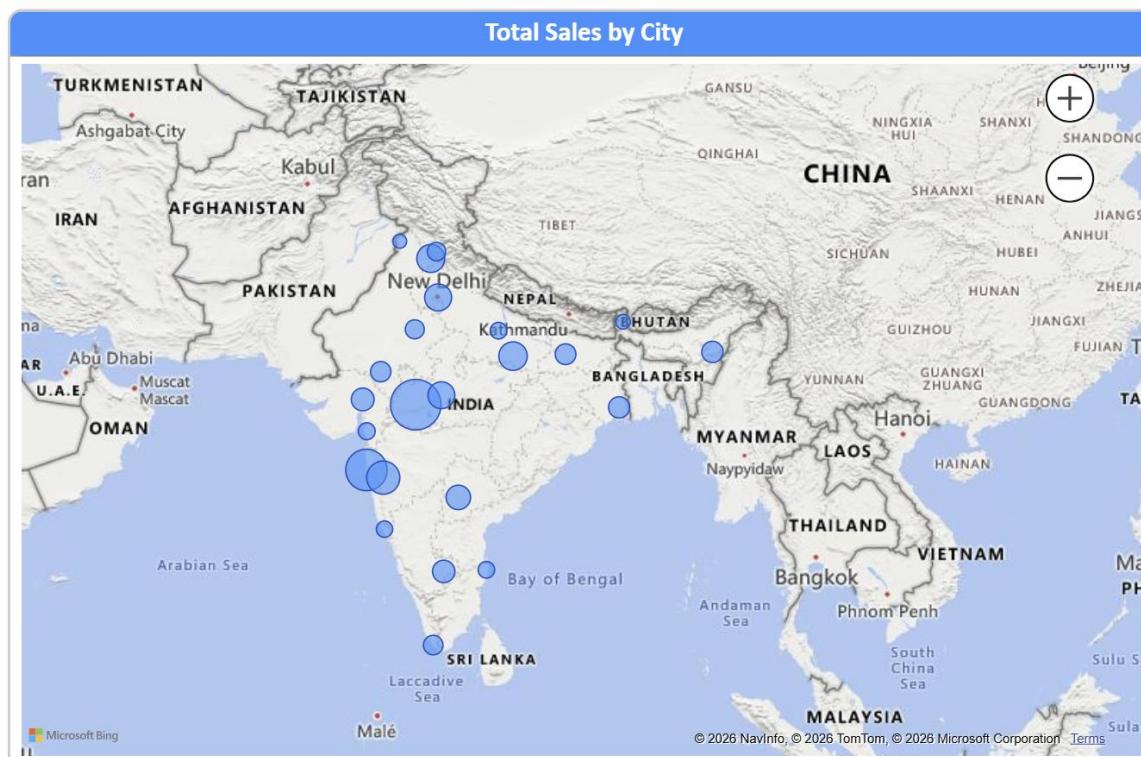
Geographic Sales Analysis:

Visualize total sales on a map by city to identify regional sales patterns.

To identify total sales added new column in List of orders as Total Sales

1 Total Sales = [Total Revenue]
2

Order ID	Order Date	CustomerName	State	City	Order Month	Total Sales
B-25601	Sunday, April 1, 2018	Bharat	Gujarat	Ahmedabad	Apr	\$9,599
B-25602	Sunday, April 1, 2018	Pearl	Maharashtra	Pune	Apr	\$15,559
B-25603	Tuesday, April 3, 2018	Jahan	Madhya Pradesh	Bhopal	Apr	\$9,086



Location

City

Legend

Add data fields here

Latitude

Add data fields here

Longitude

Add data fields here

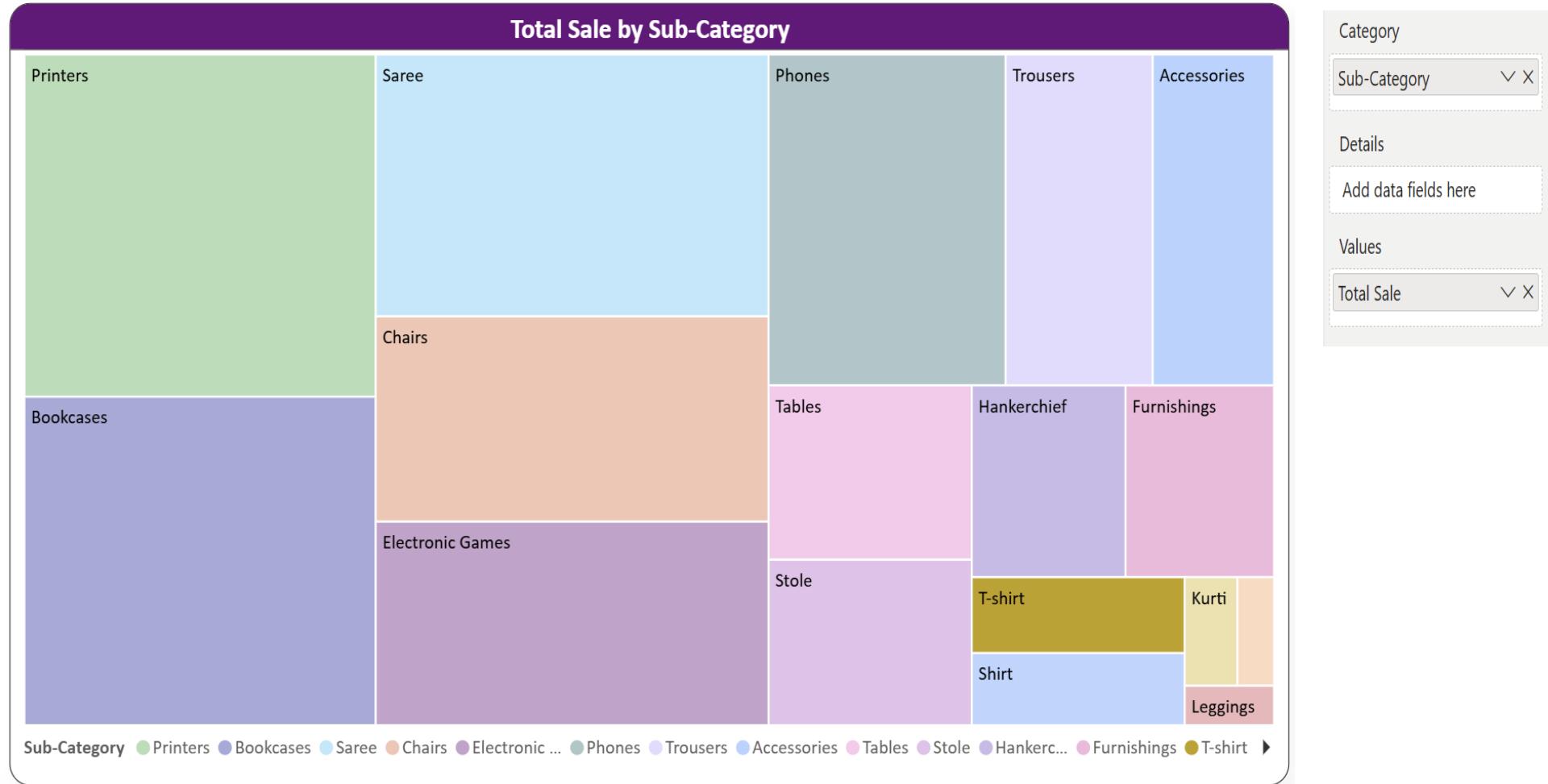
Bubble size

Sum of Total Sales

- ✓ List of Orders
- City
- CustomerName
- > Order Date
- Order ID
- Order Month
- State
- Total Sales

Sales Distribution by Sub-Category:

Represent the sales distribution across different sub-categories using a treemap.



Order Count Analysis by State:

Create a funnel chart to visualize the distribution of order counts across different states.

