

Optimex is planning to be merged with PDCL Ltd. Brown who is the CEO of PDCL is looking forward to a smooth transition and so after multiple rounds of discussion. They have decided to do audit of the business Infrastructure of Optimex.

Justin who the Chief Data Officer along with his team started auditing on the following ground.

- What is the Total Sales
- What about the Total Quantity
- Profit for the said period and the margin on the same.
- Need to have a details Performance LY for any selected Year
- Comparing the Performance vs LY
- Sales 2yrs ago for any Selected Year
- It is important to know the moving average in terms of Profit & Sales.
- A date table will make the analysis stable
- Quarter wise analysis is also important, may be slicer.
- Total Sales, Profit and % Profit can be shown as combo with card and line chart.
- Show the sales Comparison between Cumulative Performance vs Cumulative Performance LY using a area chart.
- Top Performer in terms of Product and Customer top 7 will give a clear idea.
- Performance in terms of region sales needs to workout and also needs to work on as what will be the best way to visualise it except Bar Graph

Here's a summary of key insights from your three dashboard :

## 1. "Sales Optimex" / Metrics Dashboard

### Highlights:

- **Total Sales:** 154.6M
- **Total Cost:** 96.8M
- **Profit Margin:** 37.4%
- **Total Profit:** 57.8M
- **Total Quantity Sold:** 67.6K

### Product Insights:

- **Top-Selling Products:** Brimmer (26M), Nicel (25M), Dimonies (23M)
- **Highest Profit Margin:** Dimonies (38.1%), Linon (37.8%), Nicel (37.6%)

### Customer Revenue Insights:

- **Top Customers:**
  - 21st Ltd (31.7M)
  - 3LAB (27.6M)
  - Amylin Group (26.9M)

### Revenue Distribution:

- **City-wise revenue** is evenly spread around an average between 17.5K–21K.

## 2. Sales Overview 1

### Yearly Sales Comparison (2014–2016):

- **Sales Last Year:** 94.4M
- **Profit Last Year:** 35.3M
- **Total Sales 2 Years Ago:** 350.4M (significantly higher)

### Performance by Month/Product:

- Product-wise comparison shows **Brimmer, Nicel, and Dimonies** consistently lead in sales.
- Sales dipped toward the end of the year (Oct–Dec), while July and August show peaks.

### 3. Sales Overview 2

#### Cumulative Totals:

- **Total Sales:** 154.6M
- **Total Profit:** 57.8M
- **Sales Moving Average:** 163.6K
- **Profit Moving Average:** 61.2K

#### Trends:

- Year-over-year profit and sales show a **downward trend from 2016 to 2014**, which might signal decreasing performance or a change in reporting.
- Q2 and Q4 usually show **higher profit margins**, with Q2 of 2014 having the **highest margin (31.4%)**.

#### Final Insight Summary:

- **Brimmer, Nicel, and Dimonies** dominate product sales.
- There's a **solid profit margin (~37%)**, but a noticeable **decline in recent yearly sales and profit** performance.
- **Certain customers contribute heavily to revenue**, suggesting potential for targeted engagement.
- **Q2 tends to perform best**, which could guide future promotional strategies.