

CodeShape IT Solution

Shaping The Future Of Coding

Data Analytics (Power BI)

SALES PERFORMANCE DASHBOARD



1. Project Overview

The Sales Performance Dashboard is a powerful, data-driven web application built to visualize and analyze a company's sales operations. It enables sales teams and managers to monitor KPIs, detect trends, and make strategic decisions based on real-time data. Designed with modern technologies, the solution ensures scalability, interactivity, and secure cloud deployment.

2. Objectives

- ❖ **Provide real-time insights** into sales data.
- ❖ **Track key sales metrics (KPIs)** like revenue, conversion rate, top products, and regional performance.
- ❖ **Offer customizable filters and dynamic visualizations** for better understanding of data.
- ❖ **Enable secure access for different user roles**, including Salesperson, Manager, and Admin.

3. Key Features

a. Authentication & User Management

- Secure login system with JWT
- Role-based access (Admin, Manager, Salesperson)

b. Real-Time Dashboard

- Total Revenue, Sales, Conversion Rate, AOV
- Line, bar, and pie charts for revenue and product breakdown
- Region-wise sales heatmaps
- Sales funnel visualization

c. Data Filters & Drilldowns

- Filter by date range, product category, region, and salesperson
- Drill down from region → city → individual rep sales

d. Reporting & Exports

- Download reports in PDF/Excel formats
- Email scheduled reports to stakeholders

e. Notifications

- Alerts for sales dips/spikes via email or in-app
- KPI-based auto notifications

f. Future Enhancements

- AI-based forecasting
- CRM integration (e.g., Salesforce)
- Custom goal setting and achievement tracking

4. Tech Stack

Front-End / Visualization Layer

- Power BI Desktop – design interactive dashboards
 - Power BI Service – publish/share dashboards online
 - Power BI Mobile – mobile-ready reports (optional)
-

Data Layer

Data Sources:

- SQL Server / Azure SQL
- Excel / CSV files
- Salesforce, Dynamics 365, SAP
- SharePoint Lists / Google Sheets / APIs

ETL / Data Integration:

- Power Query (within Power BI)
 - Azure Data Factory / SSIS
 - Python / R scripts (optional)
-

Data Modeling & Processing

- DAX (Data Analysis Expressions)
 - Power BI Data Model using Star Schema (fact + dimension tables)
-

Cloud & Hosting

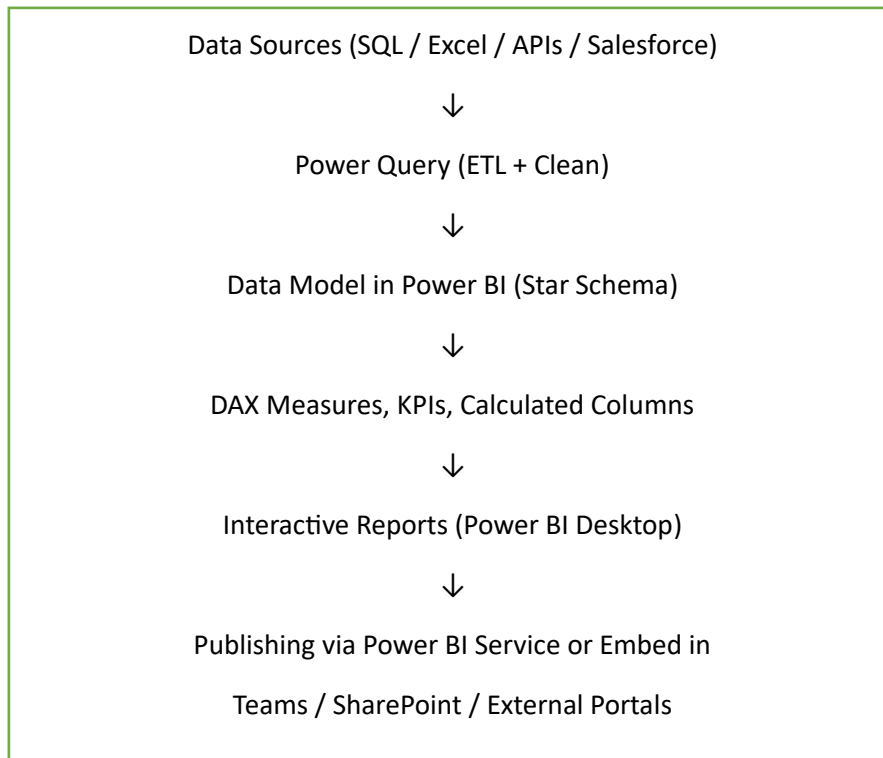
- Azure Synapse Analytics / Azure Data Lake
 - Power BI Gateway (for on-premise data refresh)
 - Microsoft Fabric (for enterprise environments)
-

Supporting Tools

- Excel – for quick analysis/export
- GitHub / Azure DevOps – version control
- Microsoft Teams / SharePoint – dashboard embedding



Example Architecture Flow



5. Submission requirements

A. Offer Letter

- **Upload on LinkedIn** between **10 AM and 2 PM**.
- **Tag the CodeShapeITSolution** LinkedIn account in your post.

B. Task Repo and Video

- **GitHub Repository:**
 - All repositories you create should be **under the CodeShapeITSolution GitHub account**.
 - Use the **CodeShapeITSolution** account name for repo creation.
- **Video Post:**
 - All videos shared on LinkedIn should have the **CodeShapeITSolution logo** prominently displayed in the video.

C. Code Architecture and Comments

- In every code you write, make sure to **add comments** at the **beginning of each section** explaining:
 - **Why** the code is written.
 - The **purpose** and **functionality** of each part of the code.
- This helps in understanding the architecture and the intention behind the code.

D. Project Demo Video

- The **project demo video** should be:
 - **No longer than 2 minutes.**
 - Include the **CodeShapeITSolution logo** in the video.

E. Project LinkedIn Posts

- For every **project** you complete, you need to:
 - **Post updates on LinkedIn.**
 - When all the projects are completed, you will be awarded a **certificate**.



CodeShape IT Solution

Shaping The Future Of Coding

THANK YOU