Power BI Sales Report Project Documentation

Project Overview

The Power BI Sales Report Project aims to provide a comprehensive analysis of sales performance across different regions, managers, couriers, and clients. The report includes interactive visuals and key performance metrics, enabling stakeholders to track sales trends, plan fulfillment, and year-over-year growth effectively.

Project Requirements and Tasks

1. Data Visualization Requirements

- **Slicer Visuals:** Created separate slicers for:
  - Year
  - Month
  - Manager
  - Courier
- **Gauge Visuals:** Developed for Azerbaijan, Baku, and other regions displaying:
  - Total sales
  - Total plan
  - Plan achievement rate
- **Table Visual:** Showcased total sales amounts, total plan amounts, and plan achievement rates for clients.
- **Line and Clustered Column Visual:** Displayed total sales, total plan, and plan achievement rate for:
  - Managers
  - Couriers
- **Card Visuals:** Provided key metrics, including:
  - Total sales
  - Total sales for the same period last year
  - Total sales of the last month
  - Monthly growth rate
  - Year-over-year (YoY) sales growth rate
  - Number of clients
- **Matrix Visual:** Displayed total sales, total sales for the same period last year, and YoY growth rate for:
  - Managers
  - Couriers
  - Clients
- **Line Chart:** Compared YoY sales trends for the top 10 cities based on total sales.

- **Line and Clustered Column Chart:** Illustrated total sales, total sales for the same period last year, and YoY growth rate for months.

Data Processing & Transformation

1. Data Extraction & Cleaning

- **Client Data:** Imported from the "Client Data" PDF file and cleaned using Power Query:
    - Appended queries
    - Promoted headers
    - Renamed columns

- **Sales Data:** Imported from "Sales Data" Excel file and processed using Power Query:
    - Removed top rows
    - Promoted headers
    - Changed data types
    - Appended queries
    - Renamed columns

- **Plan Data:** Imported from "Plan Data" Excel file and cleaned using Power Query:
    - Removed top rows
    - Promoted headers
    - Changed data types
    - Renamed columns

2. Data Modeling & Relationships

- Created relationships between tables in the **Model View**.
- Built a **Calendar Table** using the following DAX function:
- Calendar = CALENDARAUTO()
- Created a **#Measures Table** to store calculated measures.

Key Measures & Calculations

Measure Name	DAX Formula	Description
Total Sales	SUM('Sales data'[Sales])	Calculates total sales.
Total Plan	SUM('Plan data'[Plan])	Calculates total planned sales.
Plan Achievement	[Total Sales]/[Total Plan]	Computes plan achievement rate.

Measure Name	DAX Formula	Description
Sales LM	CALCULATE([Total Sales], DATEADD('Calendar'[Date], -1, MONTH))	Retrieves total sales from the last month.
Sales SPLY	IF(ISBLANK([Total Sales]),BLANK(),CALCULATE([Total Sales],SAMEPERIODLASTYEAR('Calendar'[Date])))	Retrieves total sales for the same period last year.
Monthly Growth Rate	[Total Sales]/[Sales LM] - 1	Calculates month-over-month growth.
Gauge Max	[Total Plan] * 1.25	Sets maximum gauge value at 125% of the target for better visualization.
Sales YOY	[Total Sales] - [Sales SPLY]	Computes YoY sales change.
YOY Growth Rate	IF(ISBLANK([Total Sales]),BLANK(),DIVIDE([Sales YOY],[Sales SPLY],0))	Calculates YoY growth percentage.

Dashboard Implementation

After preparing the data and defining key measures, the following visuals were developed to provide insights:

- **Slicers:** Enabled users to filter data dynamically by year, month, manager, and courier.

- **Gauge Charts:** Provided a clear representation of sales performance across different regions.

- **Tables & Matrices:** Displayed detailed performance metrics for clients, managers, and couriers.

- **Card Visuals:** Offered quick insights into key sales metrics.

- **Line Charts:** Highlighted YoY trends and top-performing cities.

- **Clustered Column Charts:** Compared monthly sales and YoY performance.

Conclusion

This Power BI sales report successfully delivers an interactive and insightful dashboard that helps track sales performance, measure plan fulfillment, and analyze YoY growth. The combination of slicers, gauge visuals, tables, and charts ensures stakeholders can make data-driven decisions efficiently.

Sales Report

Azerbaijan — 115,78%
53 308 635 ₼
61 719 571

Baku — 119,88%
6 787 744 ₼
8 137 453

Regions — 115,18%
46 520 890 ₼
53 582 118

Client Name	Total Sales	Total Plan	Plan Achievement	
Zinaida Sadıqova Yusif	223 075 ₼	197 897 ₼	✅	112,72%
Zeynalov Vüsal Calal	295 897 ₼	223 797 ₼	✅	132,22%
Zeynalov Səxavət Qabil	289 785 ₼	208 373 ₼	✅	139,07%
Zeynallı Gövhər Adgözəl	274 121 ₼	214 507 ₼	✅	127,79%
Zamanlı Nəriman Hümbət	260 378 ₼	222 819 ₼	✅	116,86%
Zabit Hətəmov Mirhəsən	258 005 ₼	184 584 ₼	✅	139,78%
Yusifov Şahsuvar Bayram	270 862 ₼	235 448 ₼	✅	115,04%
Yunusov Rizvan Nəsir	236 913 ₼	211 757 ₼	✅	111,88%
Yunis Teymurov Ağazər	265 519 ₼	215 607 ₼	✅	123,15%
Yaşar Allahverdiyev Tofiq	177 660 ₼	167 113 ₼	✅	106,31%
Vüqar Yusifov Balaxan	241 225 ₼	224 569 ₼	✅	107,42%
Total	**61 719 571 ₼**	**53 308 635 ₼**		**115,78%**

● Total Sales ● Total Plan ● Plan Achievement

Manager	Total Sales	Total Plan	Plan Achievement
Adil Məmmədov	6 830 824 ₼	5 888 195 ₼	114,61%
Eldar Nərimanov	8 283 214 ₼	7 227 504 ₼	
Hüseyn Əzimov	8 645 903 ₼	7 663 244 ₼	112,82%
Lacin Orucov	6 729 412 ₼	5 838 338 ₼	115,26%
Niyazi Soltanov	9 555 289 ₼	8 254 459 ₼	
Rüstəm Babayev	9 706 566 ₼	8 324 127 ₼	
Şöhrət Təhmazov	11 968 365 ₼	10 112 768 ₼	118,35%

Sales Comparison Report

Sales	Sales (Last Year)
61 719 571 ₼	**34 823 463** ₼

Sales (Last Month)	Monthly Growth Rate
40 331 660 ₼	**53,03%**

YOY Growth Rate	Number of Clients
77,24%	**260**

Year-over-Year Sales Comparison for Top 10 Cities

● Total Sales ● Sales SPLY

City	Total Sales	Sales SPLY
Bakı	2 407 150 ₼	4 148 738 ₼
Sumqayıt	2 003 162 ₼	1 167 592 ₼
Abşeron	1 985 553 ₼	1 185 095 ₼
Bərdə	1 258 599 ₼	689 414 ₼
Oğuz	1 251 966 ₼	699 506 ₼
Hacıqabul	1 250 099 ₼	681 094 ₼
Yevlax	1 249 790 ₼	681 432 ₼
Zaqatala	1 245 075 ₼	678 707 ₼
Ağsu	1 241 277 ₼	
Ağdaş	1 238 657 ₼	660 846 ₼

Manager	Total Sales	Sales SPLY	YOY Growth
⊞ Adil Məmmədov	6 830 824 ₼	3 806 096 ₼	⬆ 79,%
⊞ Eldar Nərimanov	8 283 214 ₼	4 762 025 ₼	⬆ 73,%
⊞ Hüseyn Əzimov	8 645 903 ₼	4 889 077 ₼	⬆ 76,%
⊞ Lacin Orucov	6 729 412 ₼	3 778 872 ₼	⬆ 78,%
⊞ Niyazi Soltanov	9 555 289 ₼	5 379 038 ₼	⬆ 77,%
⊞ Rüstəm Babayev	9 706 566 ₼	5 405 804 ₼	⬆ 79,%
⊞ Şöhrət Təhmazov	11 968 365 ₼	6 802 551 ₼	⬆ 75,%
Total	**61 719 571 ₼**	**34 823 463 ₼**	**⬆ 77,%**

● Total Sales ● Sales SPLY ● YOY Growth Rate

Month	Total Sales	Sales SPLY	YOY Growth Rate
January	61 719 571 ₼	34 823 463 ₼	77,24%
February	104 218 246 ₼	29 612 777 ₼	251,94%