

Dashboard Guide

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1. Data & Assumptions:

- a. Data Provided by User
- b. Data Cleansing / Transformations:
 - i. Sales Values does not Match with calculation.
 - ii. Date Column formatted / modified.
 - iii. Singapore is in 2 territories.

2. Dashboard Explanation:

Dashboard is created to provide information based on Amount and Quantity

- a. Amount Based - Sales by Amount:
 - i. This is useful considering financial aspect for Top level management.
 - ii. Multiple filters and visualizations are based on amount.
 - iii. Top management can get information based on Territory, Country, State & Customer
- b. Quantity Based - Sales by Quantity
 - i. This is important considering operations aspect and production.
- All the information can be seen for Particular Year, Quarter and Month, which will be helpful for comparative analysis over past year.
- **Using Dashboard:**
 - First **select Amount or Quantity** based analysis by clicking on the Buttons at Top left. Amount Base will provide all info in Sales Amount, while Quantity Base will provide all information in Quantity terms.
 - To get regional details select Territory: Select a territory by clicking on the Pie Chart, based on the territory selected all the data will change for that territory, like...
 - In Map countries in that territory will highlight
 - In table countries with sales or quantity share percentage will be displayed
 - Yearly sales and Quantity can be seen for that territory.
 - Sales by **Product line** is in **Tree map** (Larger area for larger sales)
 - Top 5 Customers indicate the MOST Important Customers with considerable business, based on filters used. For example, If country is selected top 5 customers with there business share can be seen for that country
 - Customers need attention: These are Customer whose Sales is decreasing compared with Past years/Quarter/Month. There is threat of losing those customers, if not attended.
 - Sales by **Deal Size** : Analyse sales volume by Deal Size. This can be used to keep track on Deal size.
 - Combination of filters can be used to get information like Country+Year+Month (Use according to requirement of insights needed)

3. Improvement Scope:

- a. Insights Analysis: Areas Need Attentions like Sales growth, should be more detailed
- b. Use of Mouse hover
- c. Direct linking to RDBMS DB for real time data
- d. Instead of single table RDBMS Model can be used