

Business problem

The management team needs a way to track KPIs (sales, revenue, profit, returns), compare regional performance, analyze product-level trends, and identify high-value customers.

The Objective :

Use Power BI Desktop to:

- Connect and transform the raw data
- Build a relational data model
- Create calculated columns and measures with DAX
- Design an interactive dashboard to visualize the data

I have created a four report that incorporates various visualizations to provide insights into the business data.

1. Exec Dashboard:

The report showcases four KPI cards featuring vital metrics:

total revenue (\$), total profit (\$), total orders (thousands), and return rate.

A line chart illustrates revenue trends from the month's outset.

I've created KPIs comparing present and past month's revenue, orders, and returns.

A bar chart highlights orders in diverse categories, and dynamic tooltips provide additional insights, including a weekly order area chart and aggregates for total

revenue, orders, returns, and profit.

A matrix emphasizes the top 10 products, while Drill Through options enhance interactivity. The report concludes with cards identifying frequently ordered and returned product types.

2. Maps:

A map visualizes total orders by country, with slicers enhancing navigation for specific continents.

3. Product Details:

This report focuses on the top 10 products. It begins with a card displaying the chosen product's name. Three gauges compare monthly orders, revenue, and profit against projected targets. A line chart illustrates profit trends, featuring both actual and adjusted lines for -100% to +100% range, with a slicer for percentage selection. An area chart showcases product trends, refined by a slicer filtering total orders, revenue, profit, return rate, and returns. The report is summarized using the AI tool Smart Narrative.

4. Customer Details:

This report starts with two cards—one counting unique customers, the other showing revenue per customer in dollars. A line chart highlights total customer trends and average revenue across different time intervals, with drill-up and drill-down options. Two donut charts provide insights into customer income level and occupation. Three cards present customer names based on revenue and order count, alongside revenue in dollars for specific customers. A slicer filters customer details for a chosen year. This concise summary captures the report's essential components with minor refinements.

