Sales Dashboard for financial year 21-22

(for ABC private ltd in lakh)

1.Data Collection and Preparation:

- Gather sales data for the financial year 20-21 from your data source (e.g., CSV, Excel, SQL Database, etc.).
- Ensure the data includes relevant fields such as sales date, product, quantity sold, sales amount, etc.
- Cleanse and transform the data using Power Query Editor in Power BI to ensure it's in a suitable format.

2. Data Modelling:

- Create relationships between different tables if needed (e.g., connecting sales data with product data or customer data).
- Define necessary calculations or measures (like total sales, average sales, year-over-year growth, etc.).

3. Creating the Sales Dashboard:

- Open Power BI and load the cleaned and modelled data.
- Design the dashboard interface using Power BI's drag-and-drop interface.

Components of the Sales Dashboard:

a. Key Metrics:

- Display total sales, total number of orders, average order value, etc., for the financial year 20-21.

b. Time-based Analysis:

- Utilize date hierarchies to analyse sales trends by day, week, month, quarter, or year.
- Show year-over-year (YoY) comparison to highlight growth or decline in sales.

c. Product Performance:

- Visualize top-selling products, revenue generated by each product, or product category.
- Show a breakdown of sales by product line or category using charts (bar, pie, etc.).

d. Regional Analysis:

- Display sales performance based on regions or geographical locations using maps or charts.

e. Customer Analysis:

- Analyse customer segments based on sales behaviour like high-value customers, new vs. returning customers, etc.

4. Visualization Types:

- Utilize various Power BI visualizations like bar charts, line charts, pie charts, maps, tables, etc., to represent data effectively.
- Ensure visual consistency and choose the most suitable visualization type for each metric or data representation.

5. Dashboard Interactivity:

- Implement slicers, filters, and drill-down functionalities to allow users to interact with the dashboard dynamically.
- Enable users to filter data by product, region, date range, or any other relevant parameter.

6. Testing and Validation:

- Test the dashboard thoroughly to ensure accuracy and functionality.
- Validate the dashboard against the original data source to confirm the correctness of the insights provided.

This outline provides a structured approach to creating a Sales Dashboard for ABC Limited for the financial year 20-21 using Power BI.