Sales Report Dashboard – User Guide

1. Introduction

This user guide explains how to use the Sales Report Dashboard created in Power BI Desktop. The dashboard is designed to analyze sales performance across regions, product categories, and time periods with interactive filtering and drill-down capabilities.

2. Data Source

The dashboard is connected to an Excel file named sales_report.xlsx. This file contains historical sales data including date, region, product category, and sales values.

3. Key Metrics Explained

• Total Sales: Displays the cumulative sales for the selected filters.
• Rolling 3-Month Average: Shows the average sales of the last three months for trend analysis.
• Year-over-Year (YoY) Growth %: Compares sales growth with the previous year.
• Previous Year Sales: Displays total sales of the prior year for comparison.

4. Dashboard Filters

The dashboard provides multiple slicers to refine analysis:
• Product Category: Filter data by Clothing, Electronics, or Furniture.
• Region: Analyze sales across East, North, South, and West regions.
• Year: Select a specific year or range of years.
• Month: Drill down into monthly sales trends.

5. Visualizations Overview

The dashboard includes bar charts, line charts, and KPI cards to present insights clearly. Users can click on any visual element to cross-filter other visuals dynamically.

6. Drill-Down and Interactivity

Drill-down functionality allows users to navigate from yearly to monthly data. Selecting a region or category dynamically updates all visuals, enabling detailed analysis.

7. How to Use the Dashboard

1. Open the Power BI (.pbix) file in Power BI Desktop.
2. Use slicers on the left panel to apply filters.
3. Hover over charts to view detailed tooltips.
4. Click on bars or lines to cross-filter other visuals.
5. Use drill-down arrows on charts to explore time-based details.

This dashboard enables business users and analysts to quickly understand sales performance and make data-driven decisions.

Prepared By: Shubham Pandey

Tool Used: Microsoft Power BI Desktop