**Overview**

You are assigned to develop a report for the Dataline Bike Company.

This company manufactures and sells bikes and accessoirs to the global market.

The report will be reviewed by the CEO as well as the Markting and Products team.

At the moment the relevant reports are created manually in pdf and Excel

and they want to replace these reports now with Power BI reports.

The two different user groups have different requirements which will be layed out

in the next pages.

Source data – part I

❑ We have 4 csv files with the sales orders from 2017-2020

The data – part II

❑ We have one Excel file with multiple sheets

The report

❑ The report will be used by two different user groups:

▪ Our CEO and the managers

▪ Product and marketing specialists

The two user groups have different requirements which, ideally,

should be all met. You can create multiple report pages for that if necessary.

**Requirements - CEO**

❑ The CEO wants to understand what products drive profit / loss in different countries.

By hovering over the countries the CEO also wants to see the profit development

in a report page tooltip.

❑ Overall development over time of the revenue is very interesting.

❑ Profit of all categories / subcategories is also something important.

Suggestion: Matrix visual with additional conditional formatting

such as data bars to make it more readable for the CEO.

**Requirements – Marketing & Products team**

❑ The Marketing & Products team would like to see the total sales amount year to date.

❑ They would also like to see the difference in profit compared to the previous year.

❑ They would also like to see a details page where they can drill from the

Executive Summary's page to these details. These details are about the exact list of

orders incl. order date, order quantity, revenue, profit product and country.

❑ They would like to have one page with a customer analysis

incl. average profit per customer and how it might have changed over time,

top 10 customers in terms of revenue.

❑ They would like to have one page where they want to understand how

❑ the revenue in the different categories has devolopped over time

❑ the profit margin (defined as percentage of profit from the revenue)

has developed over time and what are the profit making categories,

subcategories and products.

Additional instructions

❑ You might need to clean up the data in some cases and transform what is necessary.

❑ In the sales table there is the order date only in the format 20221231.

It might help to create an additional date column and/or a create a date dimension.

❑ Create the appropriate data model.

❑ You need to create some measures such as:

❑ Create drill throughs and drilldowns where necessary.

❑ The report should be designed as nicely as possible and easy to read.

❑ The company is flexible and open for your additional suggestions regarding

report. So, there is some room your creativity.

❑ Revenue = Order quantity \* Unit price

❑ Profit = Order quantity \* (Unit price – Product Standard cost )

❑ Year-to-Date Measure