

<https://www.kaggle.com/datasets/konstantinognev/financial-samplexlsx>

or

<https://www.iimchyderabad.com/Material/Financial Sample.xlsx>

◆ Step1:

1. Load Data

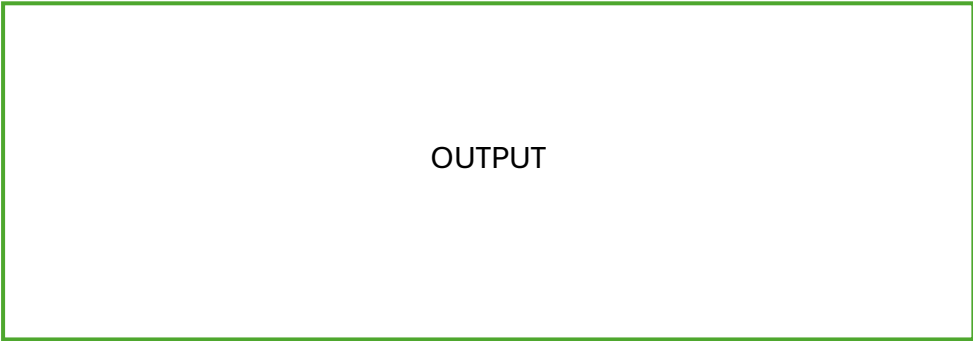
- Open **Power BI Desktop** → *Home Tab* → **Get Data** → Excel → select your Financial Sample.xlsx.
- Load the table into Power BI.

◆ Step2:

Execute the Queries:

1. Percentage of total Gross Sales for each Month

- Create a **column for Month**: MonthName = FORMAT([Date], "MMMM").
- Create a **Measure**:
- Total Gross Sales = SUM('Financial Sample'[Gross Sales])
- Percent of Gross Sales = DIVIDE([Total Gross Sales], CALCULATE([Total Gross Sales], ALL('Financial Sample')))
- Visualization: **Clustered Column Chart** or **Line Chart** with MonthName on X-axis and Percent of Gross Sales on Y-axis.



OUTPUT

2. Top 3 Month Name and Gross Sales

- Use the same **MonthName** field.
- Visualization: **Bar Chart** → drag Gross Sales measure to values and MonthName to axis.
- In **Filters** pane, set **Top N = 3 by Gross Sales**.

OUTPUT

3. Sales by Country and Product (Pivot Table)

- Visualization: **Matrix**.
- Rows → Country
- Columns → Product
- Values → Gross Sales

OUTPUT

4. Sales Price by Date and Country (Pivot Chart)

- Visualization: **Line & Clustered Column Chart** (or Line Chart).
- Axis → Date
- Legend → Country

- Values → Sales Price.

OUTPUT

5. Manufacturing Price by Product and Year

- Create **Year column**: Year = YEAR([Date]).
- Visualization: **Matrix** or **Column Chart**.
- Axis/Rows → Product
- Legend/Columns → Year
- Values → Manufacturing Price.

OUTPUT

6. Segment and Units Sold (Pivot Chart)

- Visualization: **Stacked Column Chart**.
- Axis → Segment
- Values → Units Sold.

OUTPUT

7. Discount and Manufacturing Price (Pivot Table and Chart)

- **Matrix:**
 - Rows → Discount
 - Values → Manufacturing Price
- **Chart:** Use **Scatter Chart** with Discount on X-axis and Manufacturing Price on Y-axis.

OUTPUT

8. Year and Discounts (Doughnut Chart)

- Use Year (calculated earlier).
- Values → Discount.
- Visualization: **Doughnut Chart**.

OUTPUT

9. Frequency of Manufacturing Price

- Create a **Histogram** visual:
 - Use Manufacturing Price as the field.
 - Or, if histogram is not available, use **Column Chart** with Manufacturing Price grouped/binned and count frequency.
 - Create a Measure Frequency using the following DAX:
Frequency=COUNTROWS('financials')
 - X-Axis: Manufacturing Price
 - Y-Axis: Frequency

OUTPUT

10. COGS and Profit Correlation (Scatter Plot)

- Visualization: **Scatter Chart**.
- X-axis → COGS
- Y-axis → Profit
- Optional: Add Country as Legend for grouping.

OUTPUT

◆ Dashboard & KPIs

- Create a **new Power BI Page** called "Sales Dashboard".

- Add KPIs:
 - Gross Sales (Card visual).
 - Profit (Card visual).
 - Units Sold (Card visual).
- Combine with charts created above.
- Place charts/matrices below in a neat grid layout.
- Apply a consistent theme (View → Themes).
- Sample Output:

Financial Sales Dashboard

Gross Sales

\$344.80M

Profit

\$67.21M

Units Sold

2,265

Year

All

Country

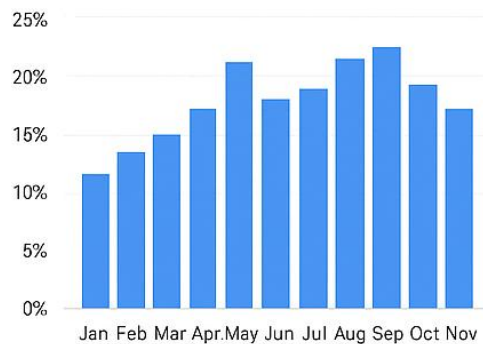
Australia

Canada

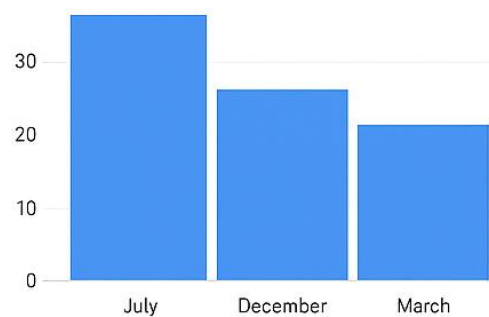
Product

All

Gross Sales % by Month



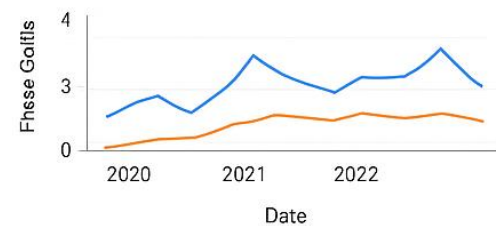
Top 3 Months



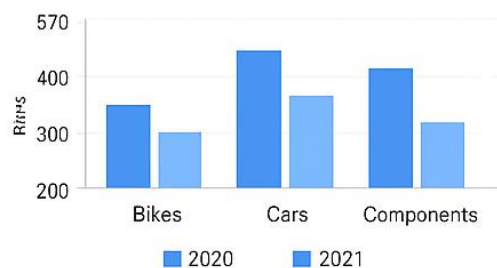
Sales by Country & Product

	Bikes	Cars	Components
Australia	\$78,000	\$75,000	\$46,000
Canada	\$35,000	\$85,000	\$34,000
Germany	\$52,000	\$99,000	\$16,000

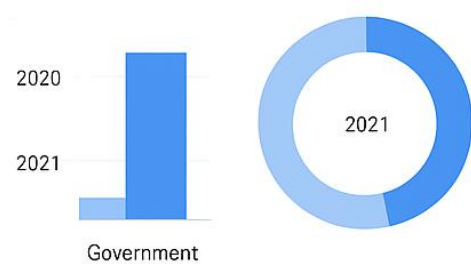
Sales Price by Date & Country



Manufacturing Price by Product & Year



Segment and Units Sold



- Save everything into a **.pbix Power BI file** so you can open it directly.
