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

◈ Step1:

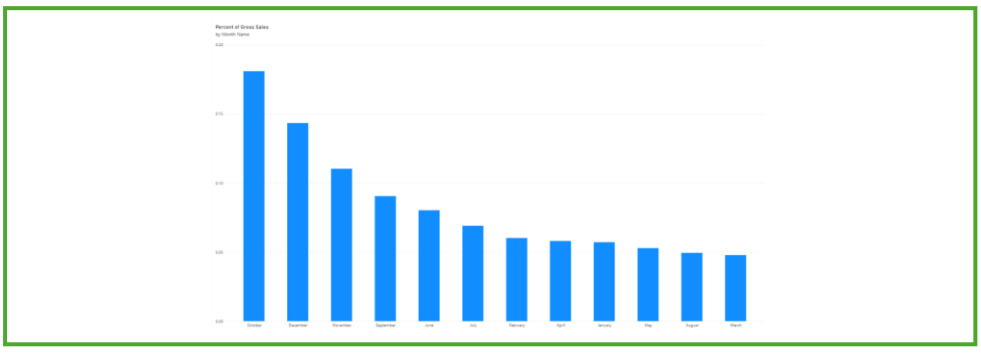
1. **Load Data**
    - Open **Power BI Desktop** → *Home Tab* → **Get Data** → Excel → select your Financial Sample.xlsx.
    - Load the table into Power BI.

◈ Step2:

Execute the Queries:

1. Percentage of total Gross Sales for each Month

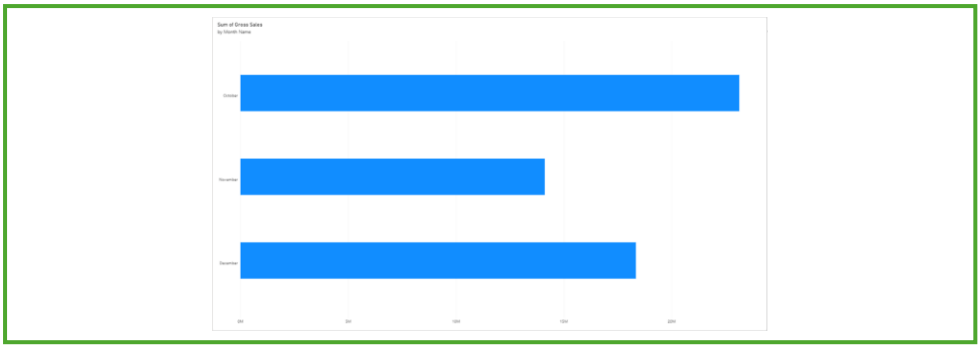
- Create a **column for Month**: MonthName = FORMAT([Date], "MMMM").
- Create a **Measure**:
- Total Gross Sales = SUM('Financial Sample'[Gross Sales])
- Percent of Gross Sales = DIVIDE([Total Gross Sales], CALCULATE([Total Gross Sales], ALL('Financial Sample')))
- Visualization: **Clustered Column Chart**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



---

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**.



---

3. Sales by Country and Product (Pivot Table)

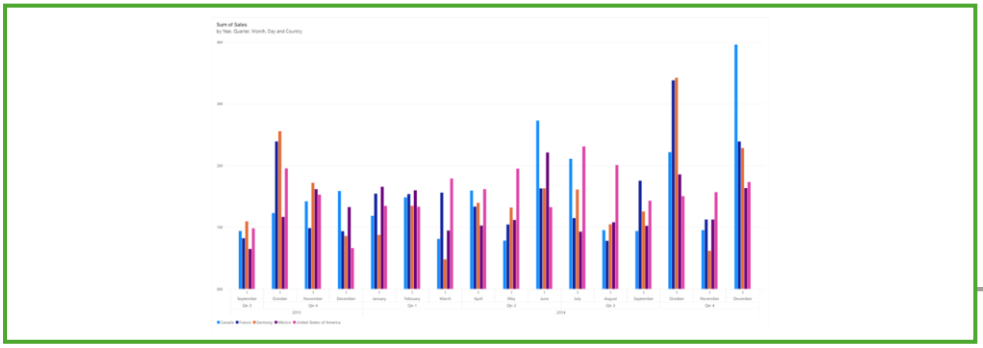
- Visualization: **Matrix**.
- Rows → Country
- Columns → Product
- Values → Gross Sales

Country	Amarilla	Carretera	Montana	Paseo	Velo	VTT	Total
Canada	41,64,683.50	28,25,853.50	29,82,114.50	81,72,612.00	36,60,387.00	51,26,513.00	**2,69,32,163.50**
France	43,18,664.00	36,87,829.50	38,43,216.00	59,84,767.00	42,44,434.50	40,02,763.50	**2,60,81,674.50**
Germany	41,23,204.50	33,06,376.00	37,98,355.00	55,55,838.00	46,37,903.00	34,99,791.00	**2,49,21,467.50**
Mexico	33,03,196.00	31,12,011.00	20,52,575.00	84,32,206.00	25,10,373.00	33,16,574.00	**2,27,26,935.00**
United States of America	31,27,531.50	20,05,450.50	38,73,574.00	74,66,239.00	47,73,671.00	60,22,892.00	**2,72,69,358.00**
Total	**1,90,37,279.50**	**1,49,37,520.50**	**1,65,49,834.50**	**3,56,11,662.00**	**1,98,26,768.50**	**2,19,68,533.50**	**12,79,31,598.50**

---

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

- Visualization: **Clustered Column Chart** (or Line Chart).
- X- Axis → Date
- Y- Axis → Σ Sales
- Legend → Country



5. Manufacturing Price by Product and Year

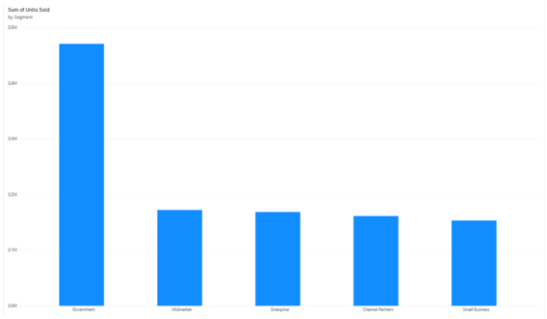
- Create **Year column**: Year = YEAR([Date]).
- Visualization: **Matrix** or **Column Chart**.
- Axis/Rows → Product
- Legend/Columns → Year
- Values → Manufacturing Price.

Product	2013	2014	**Total**
Amarilla	5980	18460	**24440**
Carretera	69	210	**279**
Montana	115	350	**465**
Paseo	510	1510	**2020**
Velo	3240	9840	**13080**
VTT	7000	20250	**27250**
Total	**16914**	**50620**	**67534**

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6. Segment and Units Sold (Pivot Chart)

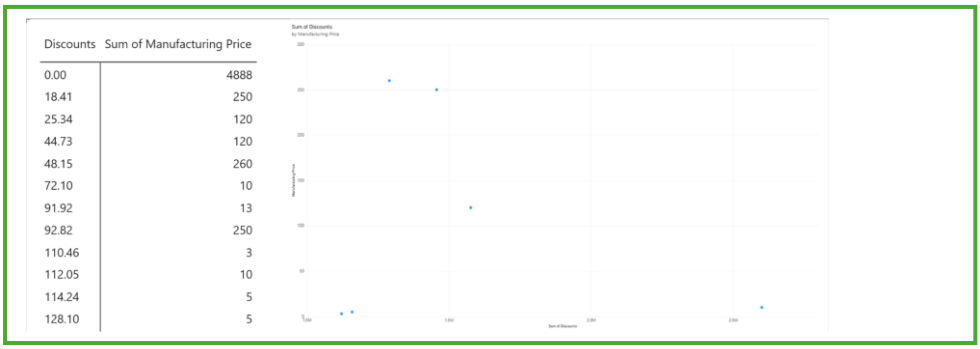
- Visualization: **Stacked Column Chart**.
- Axis → Segment
- Values → Units Sold.



---

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.

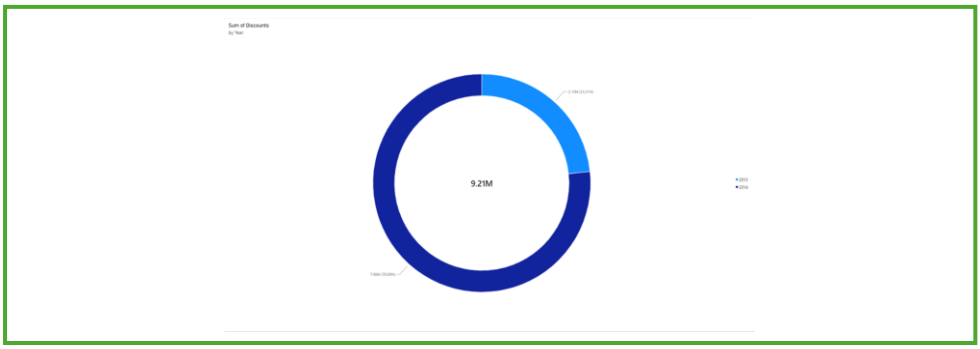


Discounts	Sum of Manufacturing Price
0.00	4888
18.41	250
25.34	120
44.73	120
48.15	260
72.10	10
91.92	13
92.82	250
110.46	3
112.05	10
114.24	5
128.10	5

---

8. Year and Discounts (Doughnut Chart)

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



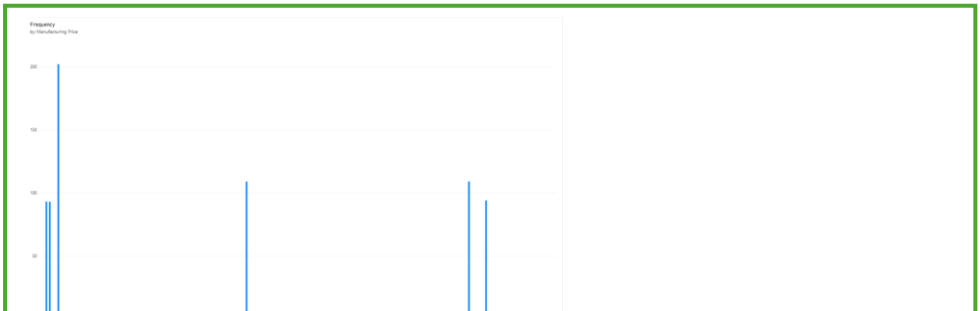
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9. Frequency of Manufacturing Price

- 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’)

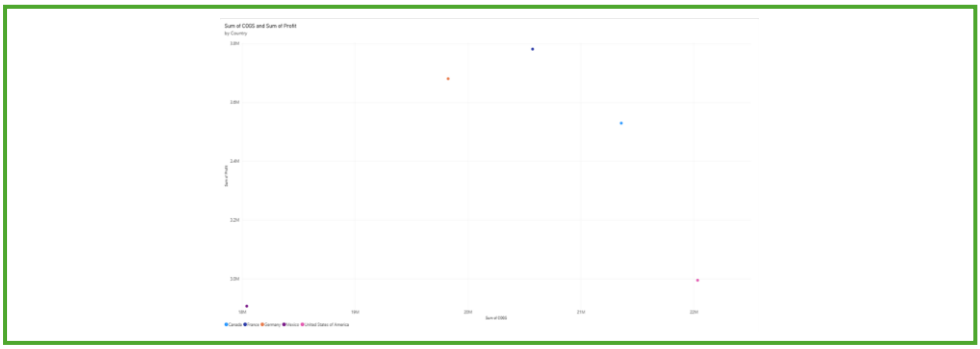
    - X-Axis: Manufacturing Price
    - Y-Axis: Frequency



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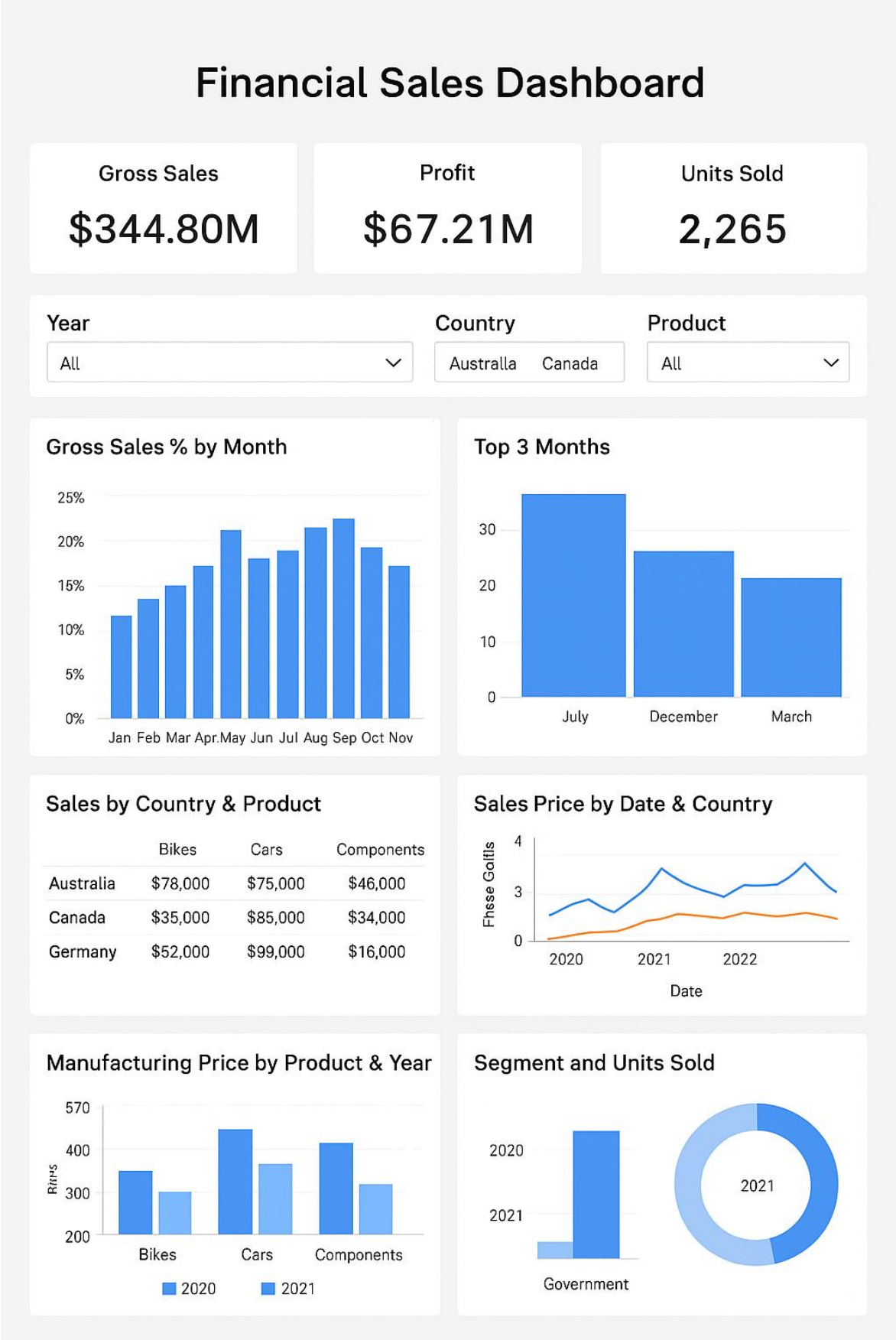
10. COGS and Profit Correlation (Scatter Plot)

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



🔷 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:



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

https://www.kaggle.com/datasets/shekpaul/global-superstore?resource=download

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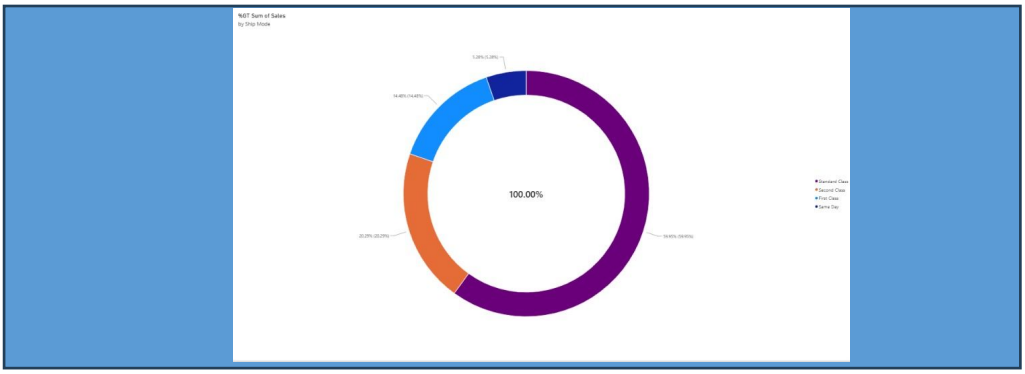
Steps :

1. **Open Power BI Desktop**.
2. Click **Home → Get Data → Excel**.
3. Select your file:
   `Global Superstore.xlsx`
4. Load the appropriate sheet (likely called "Orders").

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11. Percentage of total sales for each 'Ship Mode'

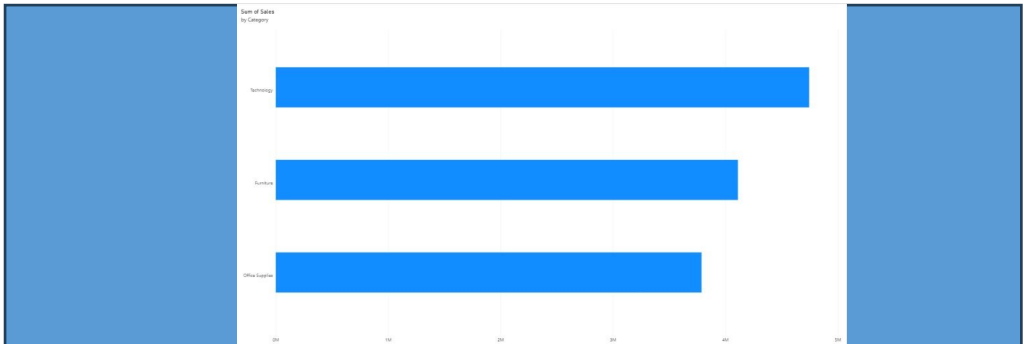
- **Visual**: Pie chart or Bar chart.
- **Steps**:
  - Use a **Donut Chart** or **Stacked Bar Chart**.
  - Axis/Legend: `Ship Mode`
  - Values: `Sales`
  - Right-click `Sales` → **Show Value As → Percent of Grand Total**



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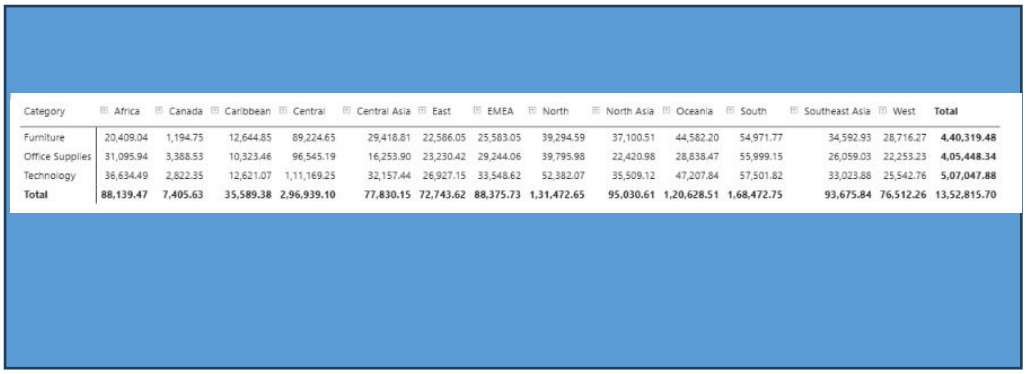
12. Category with total sales higher than 4,744,000

- **Visual**: Table or Bar chart.
- **Steps**:
  - Use a **Table** or **Bar Chart**.
  - Axis: `Category`
  - Values: `Sales`
  - Apply a **Visual Level Filter**:
    - Sales **is greater than** 4744000



13. Pivot table: Shipping cost by category, region, and segment

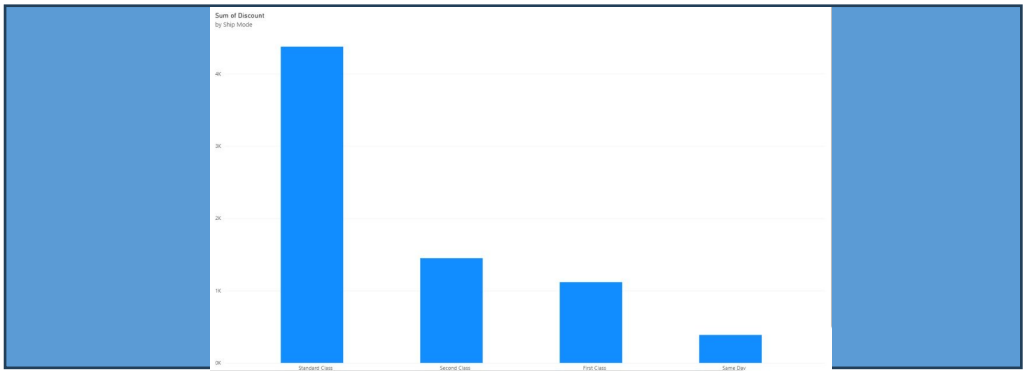
- **Visual**: Matrix
- **Steps**:
  - Use a **Matrix visual**
  - Rows: `Category`
  - Columns: `Region`
  - Values: `Shipping Cost`
  - Filters or Columns (optional): Add `Segment`



Category	Africa	Canada	Caribbean	Central	Central Asia	East	EMEA	North	North Asia	Oceania	South	Southeast Asia	West	Total
Furniture	20,409.04	1,194.75	12,644.85	89,224.65	29,418.81	22,586.05	25,583.05	39,294.59	37,100.51	44,582.20	54,971.77	34,592.93	28,716.27	**4,40,319.48**
Office Supplies	31,095.94	3,388.53	10,323.46	96,545.19	16,253.90	23,230.42	29,244.06	39,795.98	22,420.98	28,838.47	55,999.15	26,059.03	22,253.23	**4,05,448.34**
Technology	36,634.49	2,822.35	12,621.07	1,11,169.25	32,157.44	26,927.15	33,548.62	52,382.07	35,509.12	47,207.84	57,501.82	33,023.88	25,542.76	**5,07,047.88**
Total	**88,139.47**	**7,405.63**	**35,589.38**	**2,96,939.10**	**77,830.15**	**72,743.62**	**88,375.73**	**1,31,472.65**	**95,030.61**	**1,20,628.51**	**1,68,472.75**	**93,675.84**	**76,512.26**	**13,52,815.70**

14. Discount by ship mode

- **Visual**: Bar or Column Chart
- **Steps**:
  - Axis: `Ship Mode`
  - Values: `Discount` (use Average or Sum based on requirement)



15. Quantity by Segment and Category

- **Visual**: Clustered Column or Matrix
- **Steps**:
  - Axis: `Segment`
  - Legend or Columns: `Category`
  - Values: `Quantity`

Segment	Furniture	Office Supplies	Technology	**Total**
Consumer	18002	56025	18130	**92157**
Corporate	10735	32236	10594	**53565**
Home Office	6217	19921	6452	**32590**
Total	**34954**	**108182**	**35176**	**178312**

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16. Make a decomposition table

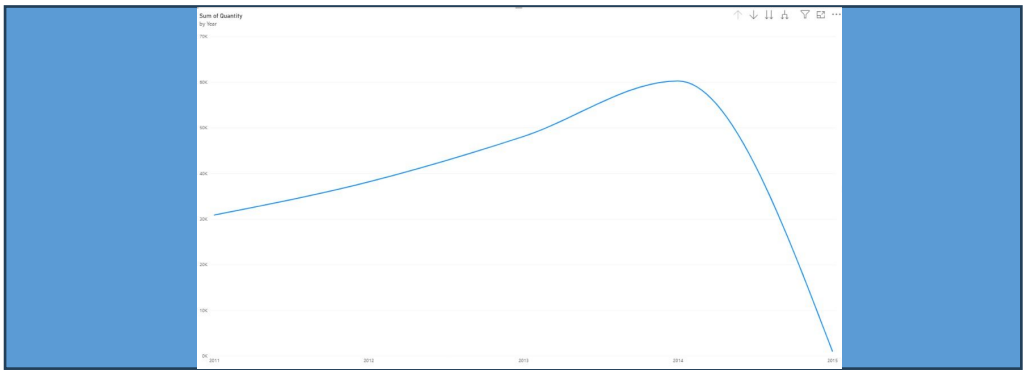
- **Visual**: Decomposition Tree
- **Steps**:
  - Use the **Decomposition Tree** visual.
  - Analyze: `Sales`
  - Explain by: Add multiple fields like `Segment`, `Category`, `Region`, etc.



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17. Quantity over Ship Date (line chart)

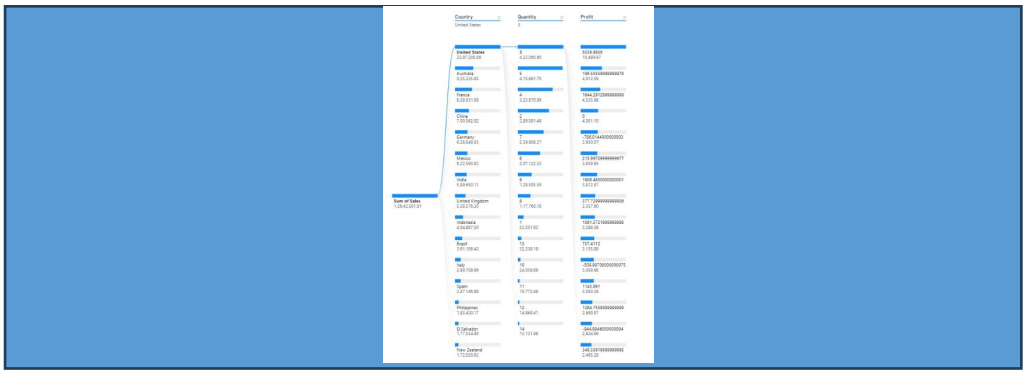
- **Visual**: Line Chart
- **Steps**:
  - Axis: `Ship Date` (change to continuous or hierarchy based on data)
  - Values: `Quantity`



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18. Country and Sales/Profit/Quantity with decomposition + maps

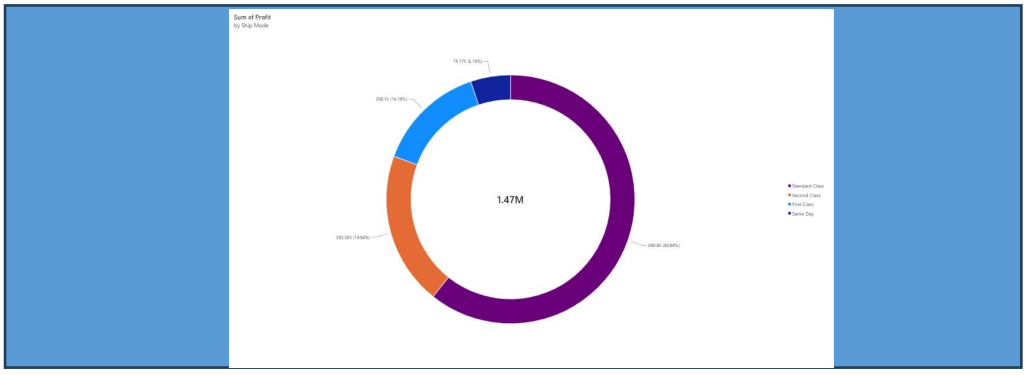
- **Visuals**:
  - **Map or Filled Map** → for Country-wise metrics
  - **Decomposition Tree** → for deeper analysis
- **Steps**:
  - For Map:
    - Location: `Country`
    - Size/Color: `Sales`, `Profit`, or `Quantity`
  - For Decomposition:
    - Analyze: `Sales`
    - Explain by: `Country`, `Quantity`, `Profit`



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19. Ship mode & Profit (Doughnut chart)

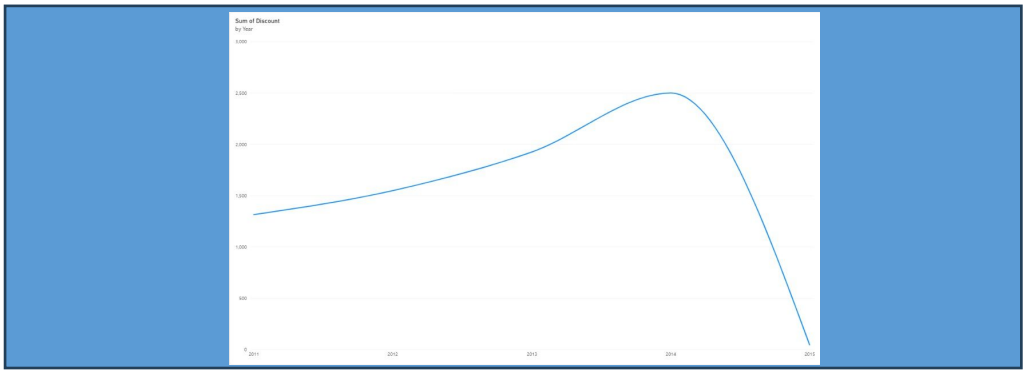
- **Visual**: Doughnut Chart
- **Steps**:
  - Legend: `Ship Mode`
  - Values: `Profit`



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20. Discount shows a repeating pattern over Ship Date

- **Visual**: Line Chart
- **Steps**:
    - Axis: `Ship Date` (make sure it's sorted correctly)
    - Values: `Discount`
    - Observe for seasonality or trend patterns.



Dashboard & KPI Report

Create a Dashboard

- Combine visuals:
    - KPIs (Total Sales, Total Profit, Total Quantity)
    - Cards, Line Charts, Donut Charts, Maps, etc.

Add KPIs:

- Use **KPI visual**:
    - Indicator: `Sales`, `Profit`, etc.
    - Trend Axis: `Ship Date`
    - Target: Set a static or dynamic measure

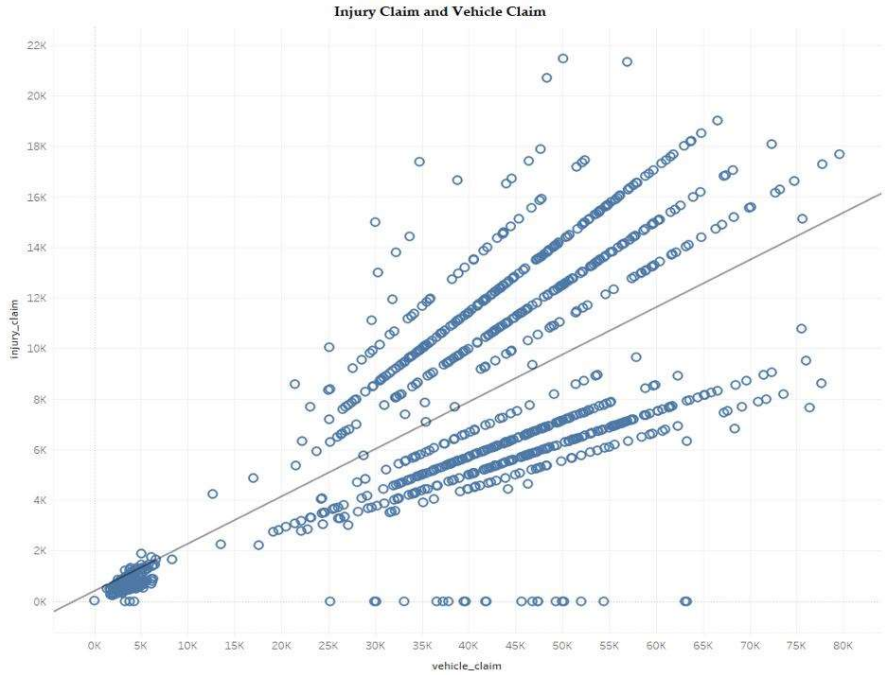
Report Tips:

- Add slicers for:
    - `Region`, `Segment`, `Category`, `Date`
- Use bookmarks to toggle between pages or insights

- Export as PDF or publish to Power BI Service to share

41. Injury Claim vs Vehicle Claim Correlation(scatter plot)

1. **Open Tableau → Connect to Data**
    - Import Fraud_insurance_claim.csv.
2. **Go to Worksheet**
    - Drag **Vehicle Claim** → *Columns*
    - Drag **Injury Claim** → *Rows*
3. **Set Mark Type**
    - In the *Marks* card → choose **Circle** (Scatter Plot).
    - Drag **Claim Type** or **Policy Number** → *Color* or *Detail*.
4. **Add Trend Line**
    - Right-click on the chart → **Trend Lines → Show Trend Lines** to visualize correlation.
5. **Format Chart**
    - Rename axes: “Vehicle Claim” (X) and “Injury Claim” (Y).
    - Adjust size, color, and tooltip.
6. **Interpretation**
    - Upward trend → **Positive correlation**
    - Downward trend → **Negative correlation**
    - Scattered points → **Weak/No correlation**



42 – Months vs Customer-policy bind rate.(line chart)

1. **Connect to Data**
   → Open Tableau → Connect to Fraud_insurance_claim.csv.
2. **Go to Worksheet**
   → Drag **Month** (or Policy Bind Date field) → *Columns*.
   → Drag **Customer ID** → *Rows*.
3. **Add Measure for Bind Rate**
   → Create calculated field (if needed):
4. Policy Bind Rate = [Policies Bound] / [Policies Offered]

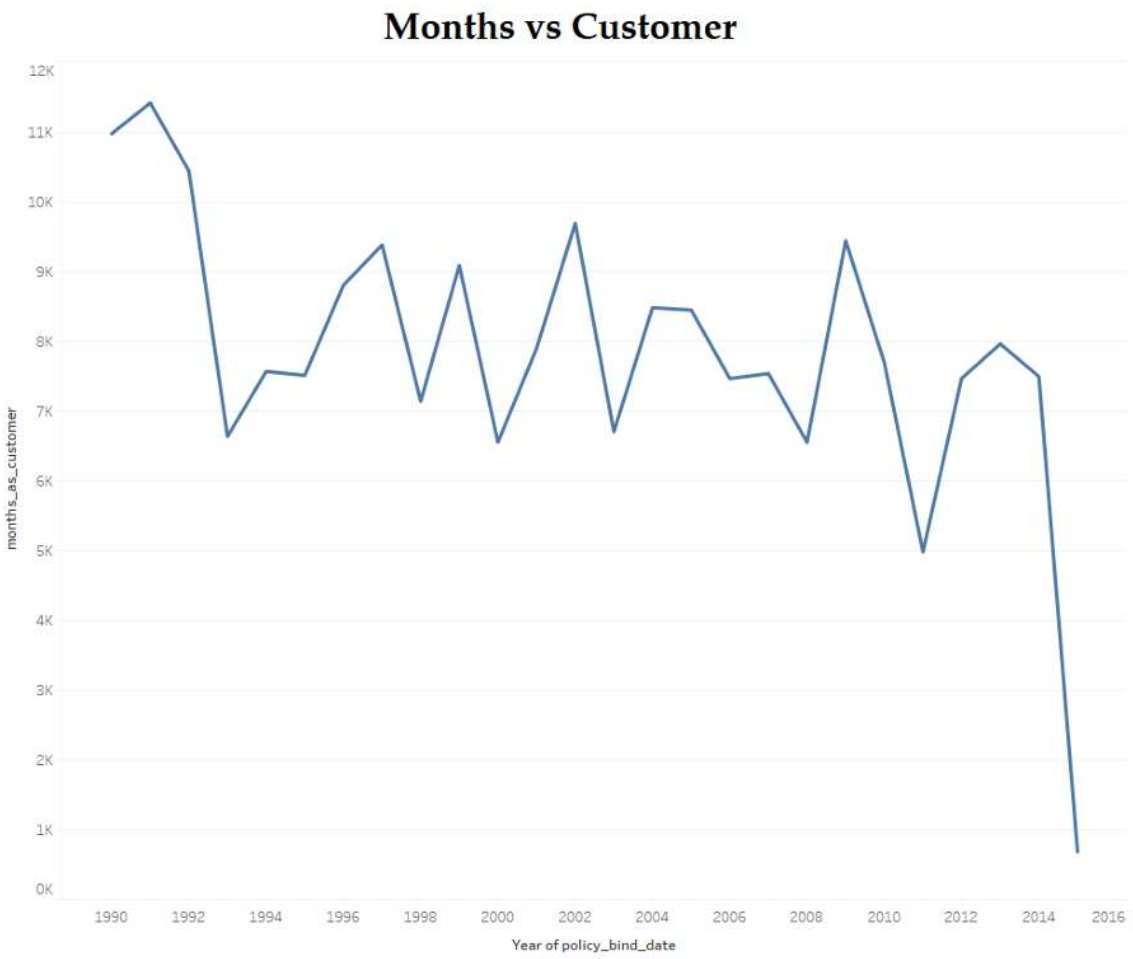
   → Drag this field to *Rows* or *Color*

   .
5. **Change Chart Type**
   → In *Marks* card, select **Bar** or **Line** chart (to show trend over months).

6. **Add Details (Optional)**
   → Add **Region**, **Policy Type**, or **Customer Segment** to *Color* or *Filter*.

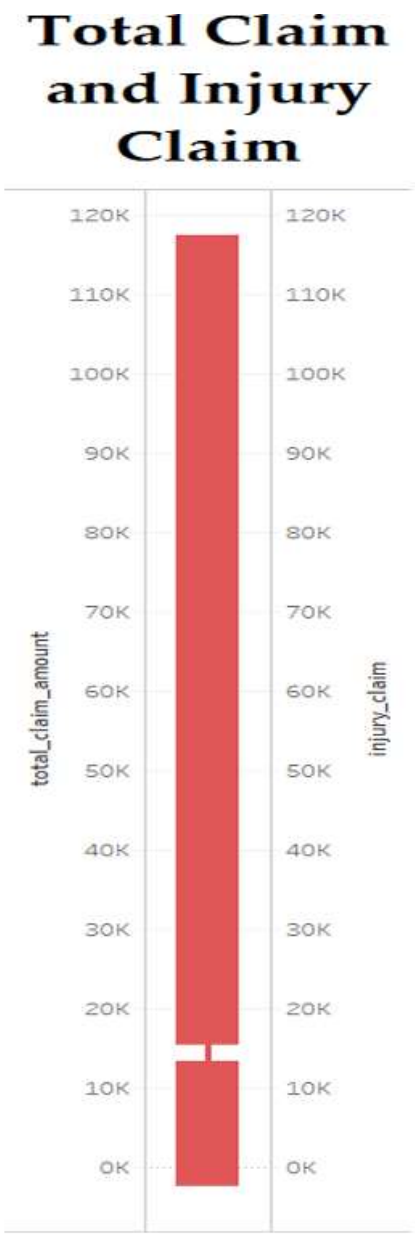
7. **Format & Label**
   → Rename axes: X = “Month”, Y = “Policy Bind Rate”.
   → Turn on data labels for clarity.

8. **Interpretation**
   → Identify which months have higher/lower bind rates and seasonal patterns.



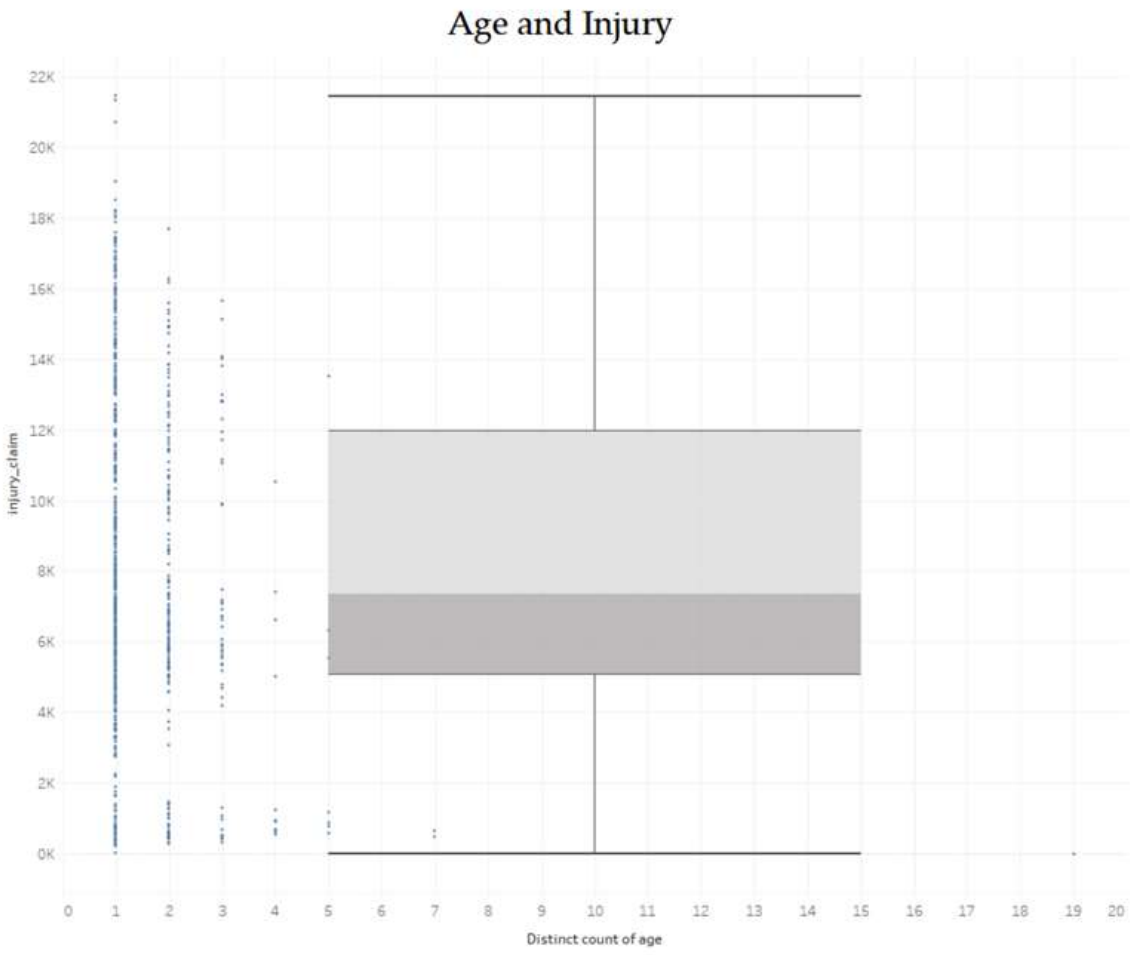
43 –how is Total Claim vs Injury Claim (dual axis bar/ line chart)

1. **Connect to Data**
   → Open Tableau → Load Fraud_insurance_claim.csv.
2. **Go to Worksheet**
   → Drag **Total Claim Amount** → *Columns*.
   → Drag **Injury Claim Amount** → *Rows*.
3. **Set Chart Type**
   → In *Marks* card → choose **Circle** (Scatter Plot).
   → Drag **Claim Type** or **Customer ID** → *Color* or *Detail*.
4. **Add Trend Line**
   → Right-click chart → **Trend Lines → Show Trend Lines**.
5. **Format & Label**
   → X-axis = “Total Claim”, Y-axis = “Injury Claim”.
   → Adjust colors, size, and tooltips.
6. **Interpretation**
   → Upward pattern → Injury Claim rises with Total Claim (positive correlation).
   → Flat or scattered → Weak relation.



44 –How are Age vs Injury Claim related?(box plot for outliers)

1. **Connect to Data**
   → Open Tableau → Load Fraud_insurance_claim.csv.
2. **Go to Worksheet**
   → Drag **Age** → *Columns*.
   → Drag **Injury Claim Amount** → *Rows*.
3. **Set Mark Type**
   → In *Marks* card → choose **Circle** (Scatter Plot)
   → Drag **Claim Type** or **Gender** → *Color* to see category patterns.



4. **Add Trend Line**
   → Right-click chart → **Trend Lines → Show Trend Lines**.

5. **Detect Outliers**
   → Right-click → **Analytics Pane → Add → Box Plot** or **Identify Outliers** option.

6. **Format & Label**
   → X = “Age”, Y = “Injury Claim”.
   → Highlight unusual high claim points (outliers).

7. **Interpretation**
   → Rising trend → Older customers have higher injury claims.
   → Scattered/no pattern → Weak correlation.
   → Extreme points → Outliers worth investigation.

45 – Age vs Property Claim (scatter plot with outliers

1. **Connect to Data**
   → Open Tableau → Load-> Fraud_insurance_claim.csv.

2. **Go to Worksheet**
   → Drag **Age** → *Columns*.
   → Drag **Property Claim Amount** → *Rows*.

3. **Set Mark Type**
   → In *Marks* card → choose **Circle** (Scatter Plot).
   → Drag **Claim Type**, **Region**, or **Gender** → *Color* or *Detail*.

4. **Add Trend Line**
   → Right-click chart → **Trend Lines → Show Trend Lines** (Linear).

5. **Detect Outliers**
   → Open **Analytics Pane → Drag "Box Plot"** or **"Outlier" detection** to view extreme values.

6. **Format Chart**
   → Rename axes: X = "Age", Y = "Property Claim".
   → Adjust colors and tooltip info.

7. **Interpretation**
   → Upward slope → Older customers have higher property claims.
   → Flat/scattered → Weak or no correlation.
   → Outliers → Potential fraudulent or exceptional claims.