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## Power bi sales dashboard template

Here are samples from more than 1,300 Tableau reports, dashboards, and KPI templates for invoice sales, quantity sold costs, gross profit and returns by customer, acct managers, products, customer addresses, shipping, location/warehouse, and many other dimensions. Please contact us for other templates that you are interested in. Power BI Sales Template: Click here. The SalesPerson dashboard assigns the key metrics that each salesperson is responsible for to the left. Screenshots show the speed of sales, but they can be easily customized. This center shows other activities, such as work to work with: Detailed opportunities or pending quotes. At the top is a button that provides access to detailed customer and product analytics. The top right shows the commissions and sales accumulated by month and day. The bottom right provides access to additional pages to analyze hot and cold performances! Who is hot? Which products are hot? Where is the hot place (country/state/city)? On the other hand, which customers, products and regions are getting colder? Here's one of the salesperson dashboard pages that analyzes hot people: Define who is hot as the highest-grossing customer during this period and the customer with the largest revenue growth rate since the previous period. The duration is defined by the drop-down list in the upper right corner. Customer Overview The Customer Overview Customer Overview dashboard includes dozens of ways to analyze customer trends. The page below lists all customers and total sales over the past two periods, and customers display the products sold, including drill-down with detailed invoice information. Seasonal analysis Most companies are affected by seasonality. The template includes a dashboard that analyzes the holiday season, season 4 (winter, summer, etc.), YTD, monthly, combined month, temporary date range, and more. Click on the Season column to drive sales and revenue growth and show customers and products that have declined year-over-year. Projection datacells come with powerful engines that support a variety of projection needs. The example below shows statistical algorithms that are suitable for many large transactions that tend to follow historical patterns. Forecasts can work with any metric: qty sales, sales, gross profit, qty in hand, or cost. The Customer Loyalty template provides more than a dozen ways to analyze customer loyalty, such as a customer with a minimum annual purchase history or a customer start date (the first invoice date). In the example below, customers with dark blue bars have consistently purchased at least \$5K per year over the past four years. Top performances show the highest sales this year. We also have about 1,360 quarters and months of business operations, examples below indicate customers with outstanding bonds (brown color is ar past due amount), high probability of closing and all CRM opportunities, shipping orders, actual sales and gross profit, all according to, all according to Filters, such as this branch and account manager. Similar dashboards can display information by product, region, account manager, and other dimensions that work with related data sources. This dashboard is not immediately available. However, if your organization has data to populate, you can easily set it up (contact us for more information). A delivery user by a customer searches/selects a customer from a drop-down list, and the query displays sales in the same month for the past two years. The red color indicates a decrease in sales compared to last year. This can help address declining sales and determine why certain regions do better than others. We have similar dashboards by products and salespeople. Customer trends similar to the dashboard above. Reps can select customers: Check monthly sales trends to see which products saw a decrease in sales in the same period last year. If the representative is on a call with the client, the representative can investigate the reason for the decrease in sales. We have similar dashboards by products and salespeople. Revenue growth and decreases by customers show the clients growing and declining the most since the last YTD (for QTD and MTD). We have similar dashboards for each product, customer address, shipping and salesperson. Product-specific sales growth and declines show the most growth and decline since last QTD (for MTD and YTD). We have similar dashboards by customers, customer addresses, shipping and salespeople. Top Products and ShipTo's Dashboards show the best products and sales by ShipTo. Users can change the number of parent products and the length of time they want to explore. This can help you solve logistics and delivery methods for the best products. Sales of top products to top customers More than that, top customers need to buy a lot of the best products. If not, why? There are similar reports showing sales of top customers and top products in various dimensions, such as salespeople, shipping, and cst addresses. Company-across monthly sales trends Company-across sales trends (sales, cumulative sales and growth). We also have this year after year. QTD Revenue and Year-Over-Year Revenue Growth (Customer Focus) A detailed report showing sales by salespeople and customers (and other dimensions) this year and last year. Why reduce some of them (red fonts)? Can you do something about it? We have similar dashboards by products, customer addresses, shipping and salespeople (also companies in multi-company systems). QTD Sales, Sales, and Year-Over-Year Revenue Growth (Product Focus) has generated detailed reports showing quarterly sales for this year and last year by product and salespeople. Why are some reps more and less successful than others in pushing the product? The highest revenue reduction by customers (no sales in the last period compared to this period) this report is generally useful for identifying which key customers are no longer making purchases (there are reports in the last 30, 90, and 360 days. This report is easy to change. bucket). We have similar dashboards for each product, customer address, shipping and salesperson. Product-specific revenue reductions (no sales in the last period of this period) This report is generally useful for checking which key selling items are no longer sold (there are reports for the last 30, 90, and 360 days, making it easy to change the time bucket). We have similar dashboards by customers, customer addresses, shipping and salespeople. Customer A's same-time sales growth year-over-year is a detailed report showing monthly sales and growth for the same period of the previous year. The amount of red means that it has decreased from the same period the previous year. We have similar dashboards by products, customer addresses, shipping and salespeople (also companies in multi-company systems). Product's same-time sales growth year-over-year is a detailed report showing monthly sales and growth over the same period last year. The amount of red means that it has decreased from the same period the previous year. We have similar dashboards by customers, customer addresses, shipping and salespeople (also companies in multi-company systems). Is it important for your invoice Trends organization to monitor the average amount per invoice, the number of invoices, the average items per invoice, and the average number of days between invoices? Dashboards and reports provide a great starting point. In the example below, let's show the average number of invoices and the number of invoices over time. As shown, a clear pattern of average invoice amounts decreases from January to December. What-If Prediction This is an example of a what-if scenario where predictions are calculated by applying custom growth and bounce rates to the real world of the period. Predictions can be calculated in a variety of ways or from other data sources, such as Excel or a dedicated forecasting system. An example of a real versus budget in which a budget is calculated by applying a custom increase to the actual growth of the budget period. Budgets can be calculated in a variety of ways or from other data sources, such as Excel or the budget system. How do the most important customers rank by customer on a year-by-year basis? Are they climbing or going down in the sales rankings? See the example where customer #9 44th in the 2016 total. How does the sales ranking by Product rank the most important product in a year? Are they climbing or going down in the sales rankings? See an example of customer rankings above to get an idea of how this insight is worth it. A comparison of YTD vs. PYTD sales by customer A report showed that customer sales showed YTD, formerly YTD, YTD distribution, and the whole of last year. Carts are quickly displayed in color based on box size and growth/drop based on YTD variance. The YTD to PYTD sales comparison by product is a report showing product sales for YTD, formerly YTD, YTD variance, and the whole of last year. Carts are quickly displayed in color based on box size and growth/drop based on YTD variance. This 90-day sales reduction by shipping ShipTo/ ShipTo is important. The dashboard shows sales variance for 90 days and makes it easy to change time buckets. You can view data from all sales or filter by customers and/or products. Is it important to monitor the moving average moving average? The following dashboards help you monitor your moving average in different parts of your business. You can easily change the duration included in the report and the duration of the move (for example, the average of 3, 6, and 12 months). Top Selling Last QTD vs. This QTD can monitor how QTD performs best in QTD. Ideally, they are doing better now. These dashboards cover dimensions such as salespeople, customers, products, and ShipTo. Sales, and gross profit distribution plots. In the example shown here, salesperson -ingrid is a more profitable method than others. DataSelf offers plug-and-play templates for erp systems such as: - Acumatica - Everest - MS Dynamics 365 - MS Dynamics AX - MS Dynamics GP - MS Dynamics SL - Netsweet - Sage 100 - Sage 300 - Sage Pro - Sage Pro - Sage Pro - Sage X3 Contacts Contact us to discuss other ERP systems. System.

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