QlikView Case Study
"Making Sales History Report

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Qlikview implementations. The document focuses on. Qlikview Sales History Dashboard Join our professional training program and learn from experts

History:

Version	Description Change	Author	Publish Date
0.1	Initial Draft	Surbhi Sahu	21st Aug 2013
0.1	Review#1	Amit Sharma	29th Aug 2013

Contents

Generating the Report on Sales History Data:

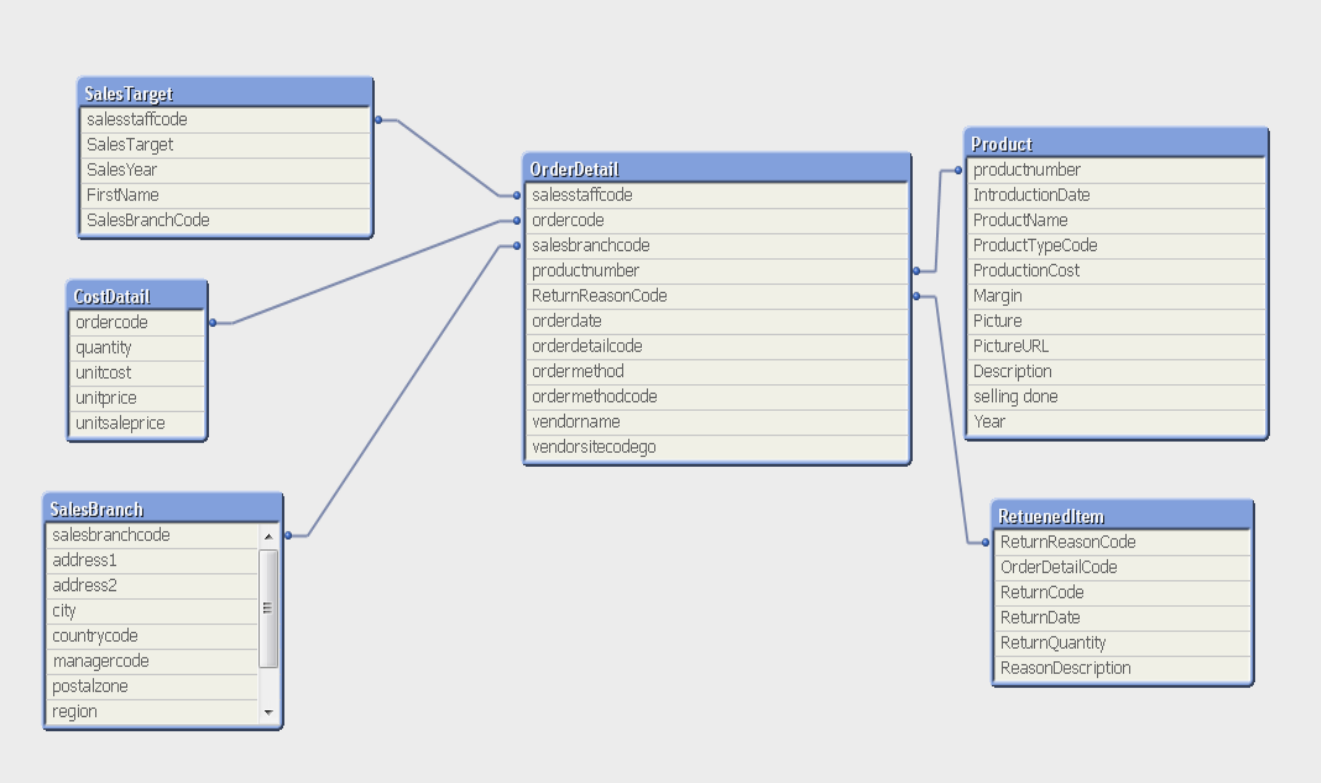
It is very important to keep track of sales, revenue that a Sales team has generated and the amount of commission payable to Salesperson. This information is very crucial for any organization to maintain record for sales staff performance by territory or location, and to indicate the strengths and weaknesses in company sales, which will help to identify the areas where they have to work to raise their sales.

With this Report Sheet, the system gathers the available information about each group of product scale records in the Sales and loads it into the Sales Reporting per yearly. Because most of the information is automatically generated, this analysis is more efficient and accurate than unexpected sales entry, it helps you to identify leases either with problems in the existing setup for sales overage.

We have developed the report which identifies these factors.

- It gives the invested production cost for each product year wise.
- The sold Quantity of the product year wise.
- The profit gained yearly.
- It gives the quantity of the product made year wise.
- It gives the discarded product which got return after sell.
- The reasons responsible for the return of the product with description of the responsible reason.
- The order method applied for the particular product.
- The sales done by each staff member for judging the performance of the staff member.

Sales History Data Model

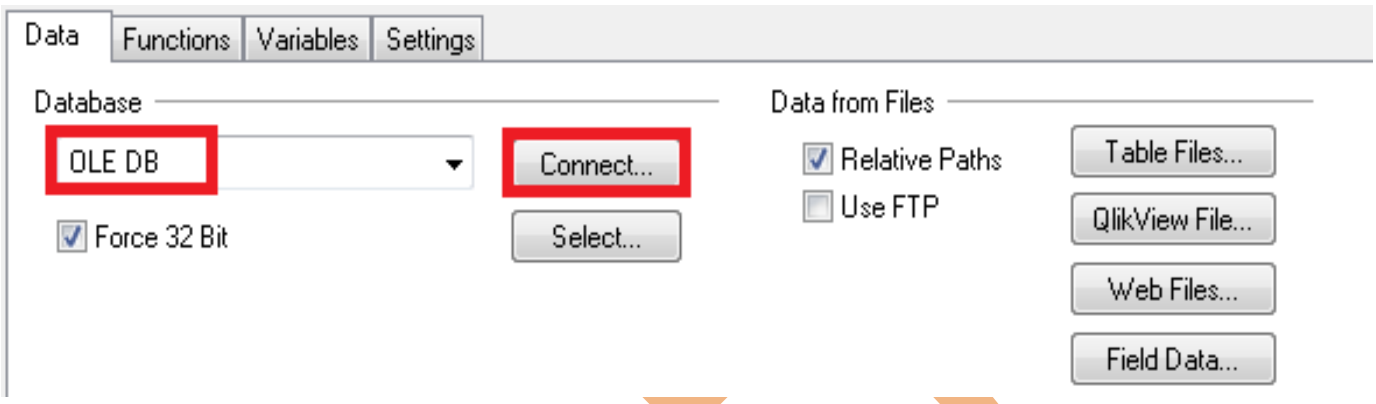


Oracle as a data source:

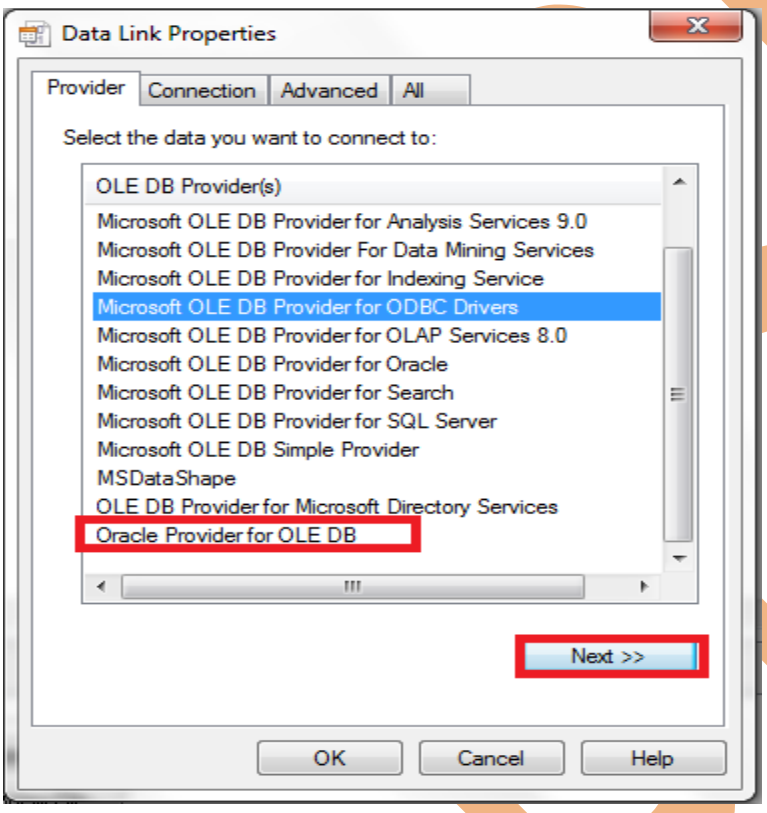
We have taken the data source as oracle.

Step 1) Open the QlikView app and give the name SalesHistory.

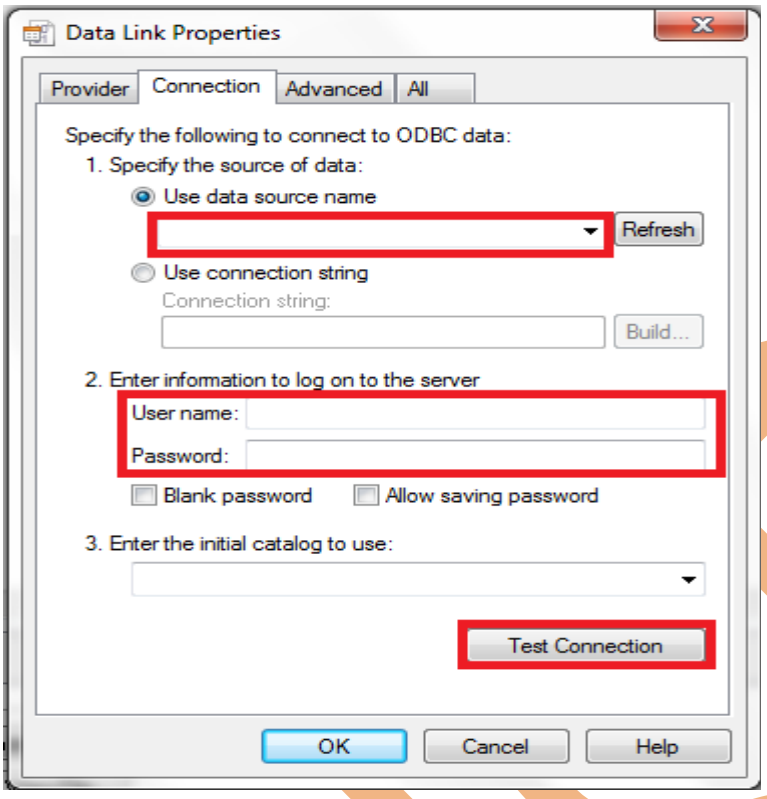
Step 2) Then go to the script Editor window and check the database interface should be OLEDB and then click on the connect option.



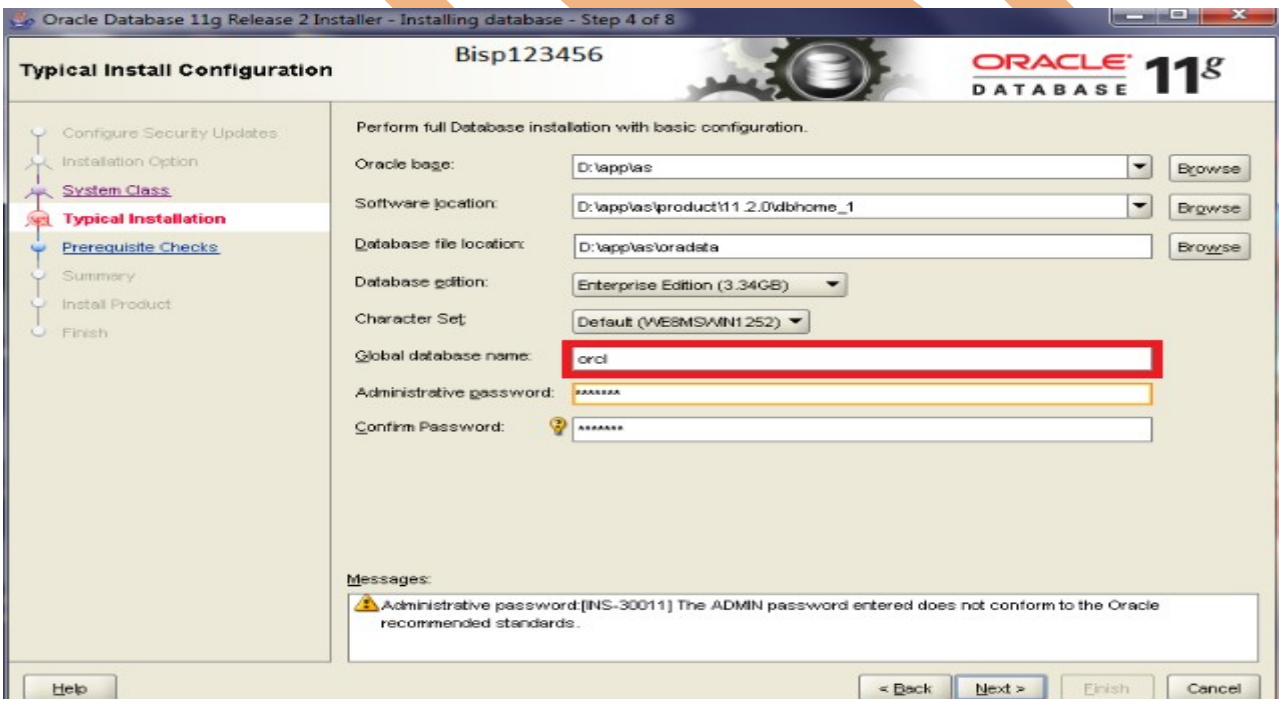
Step 3) This will open the Data Link Properties window this having the set of providers choose the provider 'Oracle provider for OLEDB' then click the Next option.



Step4) In the connection tab give the data source name as you had been given during installation and then the user name and password from which you logged on the oracle as a user.



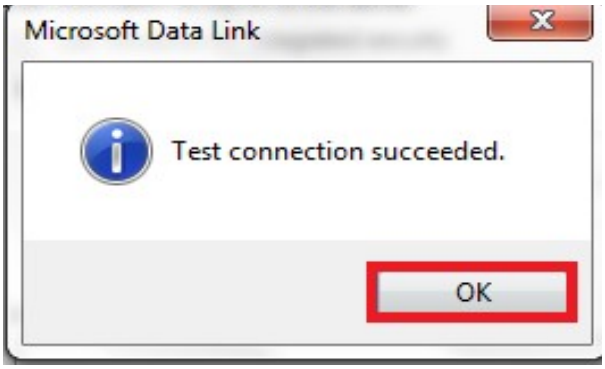
The snap shot is shown here when you have give the name of your data source.



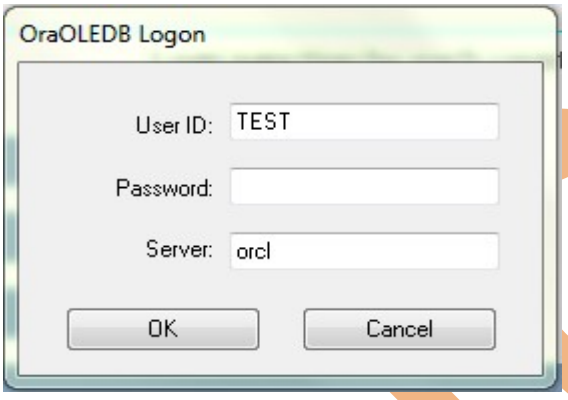
And the user name and password which you give in the oracle while creating the connection.

Step

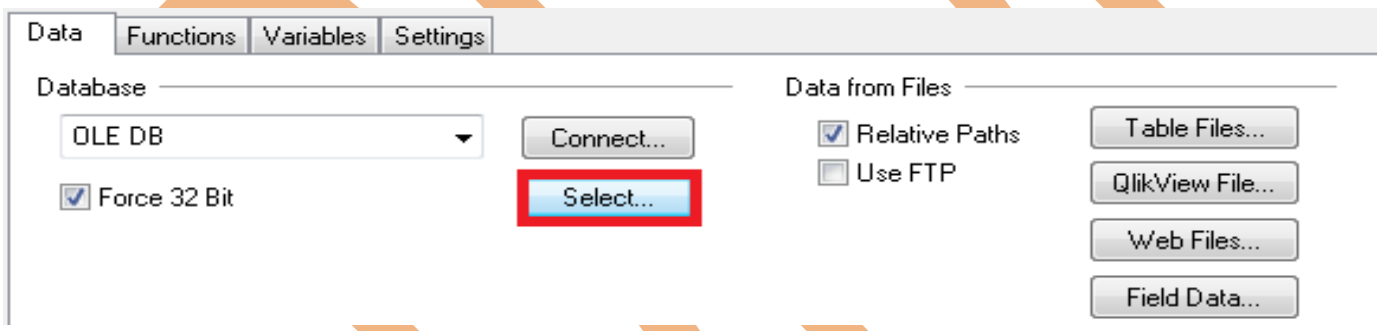
5)Hit the test connection button, the notification will come which display that Test connection succeeded.



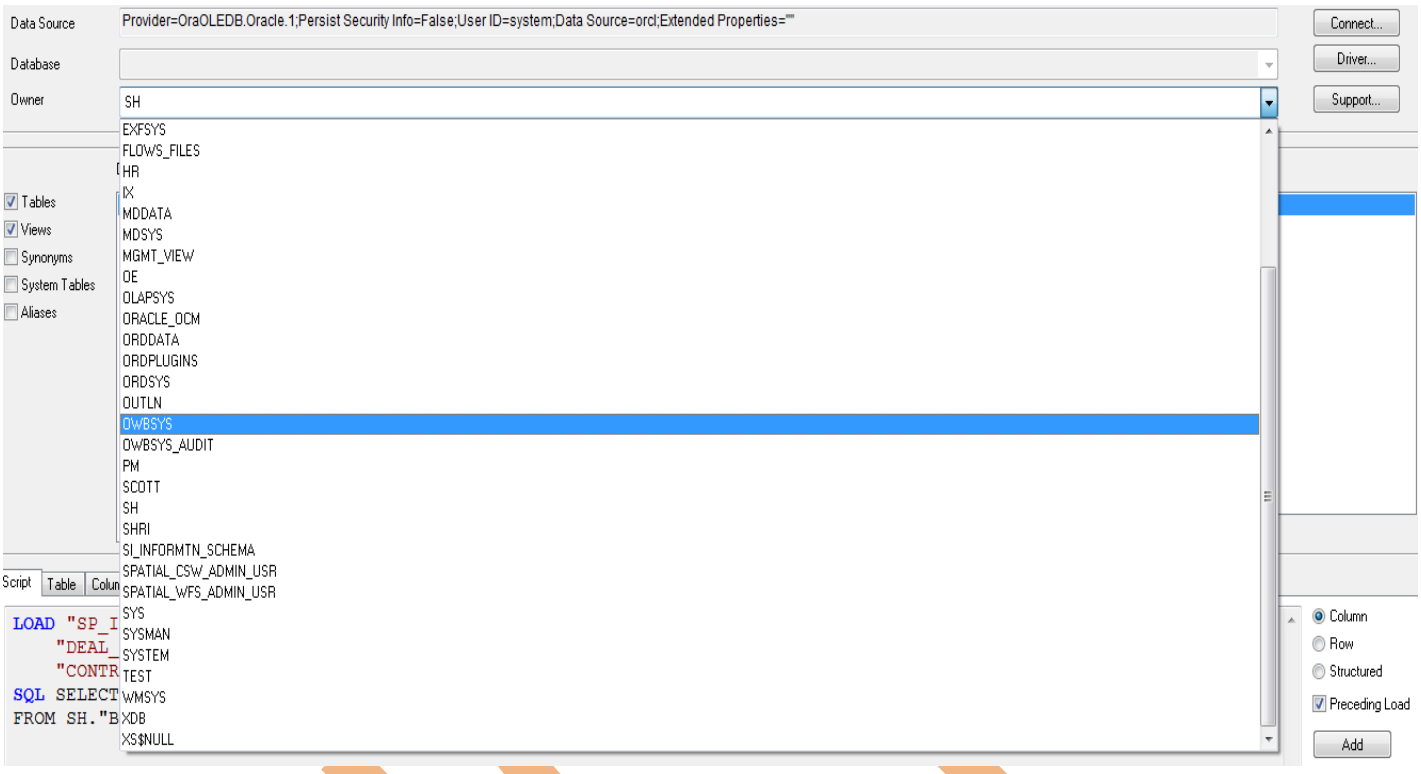
Step 6) Then another OraOLEDB Logon window will open which ask for the user id, password and server name. Server name will be same as the data source name then ->ok.



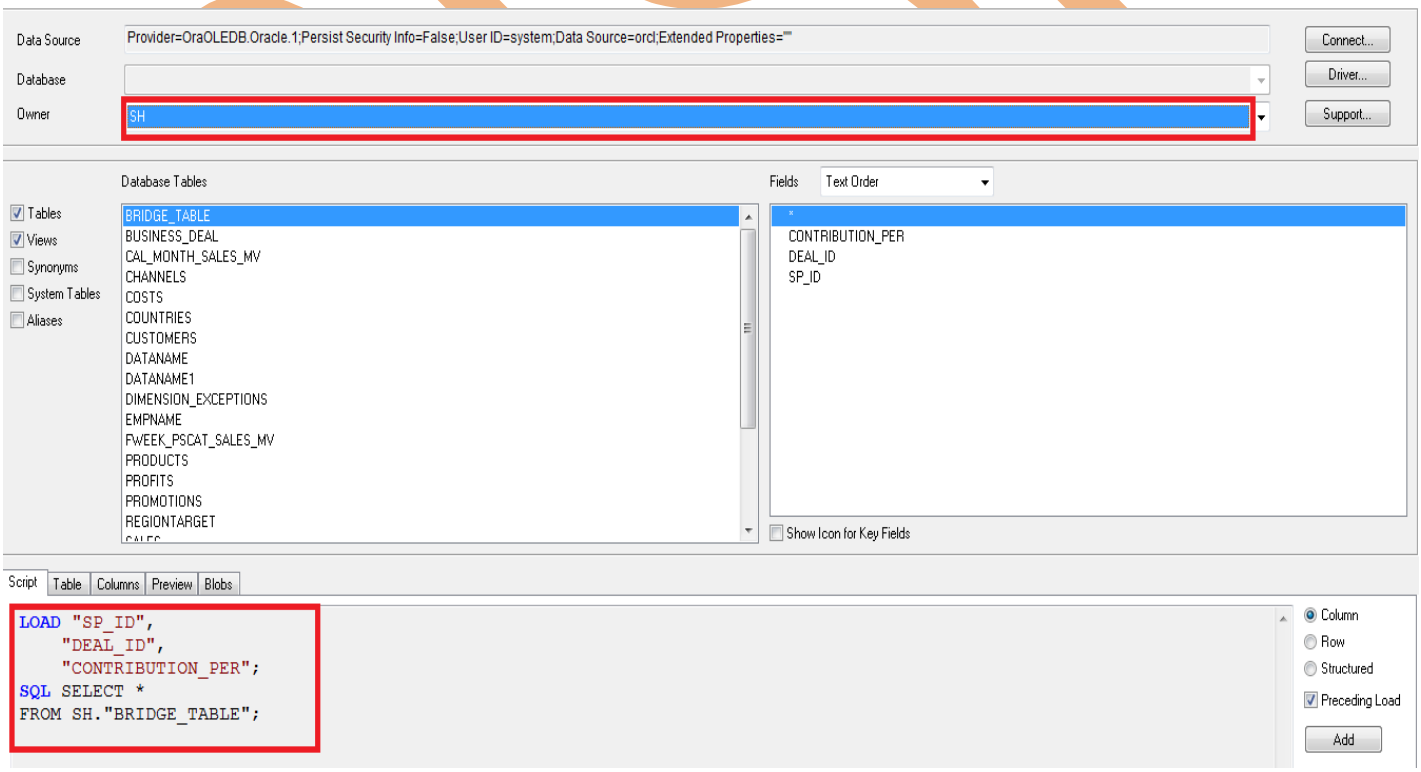
Step 7) Now, Go to the select option in Edit script window.



Step 8) From the owner, you can select the schema on which you have to work. A schema is a collection of logical structures of data, or schema objects. A schema is owned by a database user and has the same name as that user. Each user owns a single schema.



Step 8) Now choose the schema and all the fields of the table will be explore to you.You can add more table by pressing add button present in the bottom side of the wizard.



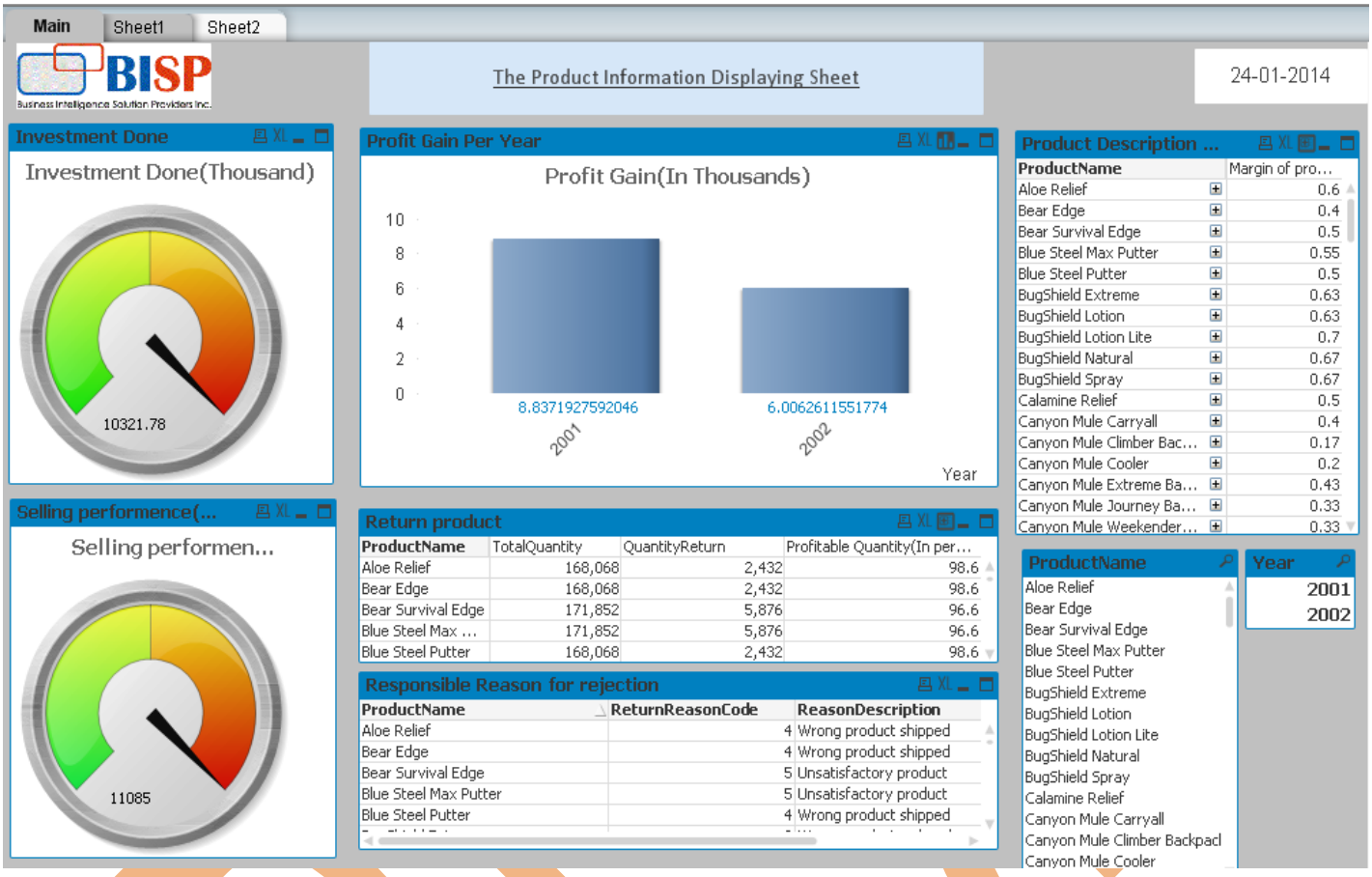
Then the script will load in the script editor

```
OLEDB CONNECT32 TO [Provider=Microsoft.Jet.OLEDB.4.0;User ID=Admin;Data
Source=C:\Users\as\Desktop\GoSales.mdb;Mode=Share Deny None;Extended
Properties="";Jet OLEDB:System database="";Jet OLEDB:Registry Path="";Jet
OLEDB:Database Password="";Jet OLEDB:Engine Type=5;Jet OLEDB:Database
Locking Mode=0;Jet OLEDB:Global Partial Bulk Ops=2;Jet OLEDB:Global Bulk
Transactions=1;Jet OLEDB:New Database Password="";Jet OLEDB:Create System
Database=False;Jet OLEDB:Encrypt Database=False;Jet OLEDB:Don't Copy
Locale on Compact=False;Jet OLEDB:Compact Without Replica
Repair=False;Jet OLEDB:SFP=False];
OrderDetail:
LOAD ordercode,
    orderdate,
    orderdetailcode,
    ordermethod,
    ordermethodcode,
    productnumber,
    ReturnReasonCode,
    salesbranchcode,
    salesstaffcode,
    vendorname,
    vendorsitecodego;
SQL SELECT *
FROM `Dim_Orderdetail`;


CostDatail:
LOAD
 quantity,
    unitcost,
    unitprice,
    unitsaleprice,
ordercode;
//salesstaffcode ,
    //productnumber,

SQL SELECT *
FROM `Fact_Order`;

SalesBranch:
LOAD address1,
    address2,
    city,
    countrycode,
    managercode,
    postalzone,
    region,
    salesbranchcode;
SQL SELECT *
```

```
FROM `Dim_Salesbranch`;
Left join SalesBranch:
LOAD Country,
    CurrencyName,
    SalesCountryCode as countrycode;
SQL SELECT Country,
    CurrencyName,
    SalesCountryCode
FROM Country;
Product:
LOAD ProductNumber as productnumber,
     IntroductionDate,
     ProductName,
     ProductTypeCode,
     ProductionCost,
     Margin,
     Picture,
     PictureURL,
     Description,
     //ReturnReasonCode,
     [selling done],
     Year

FROM
[C:\Users\as\Desktop\Destop\New Microsoft Office Excel Worksheet.xlsx]
(ooxml, embedded labels, table is Product);
**********************************************************
```

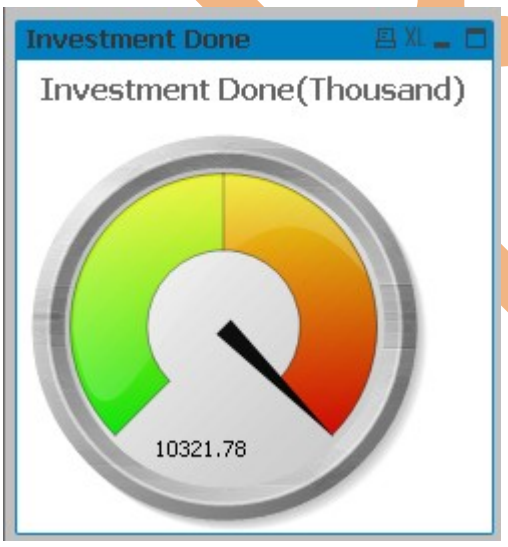
Then Reload the script and go to the table viewer, Here is the data model.

Sales History Dashboard



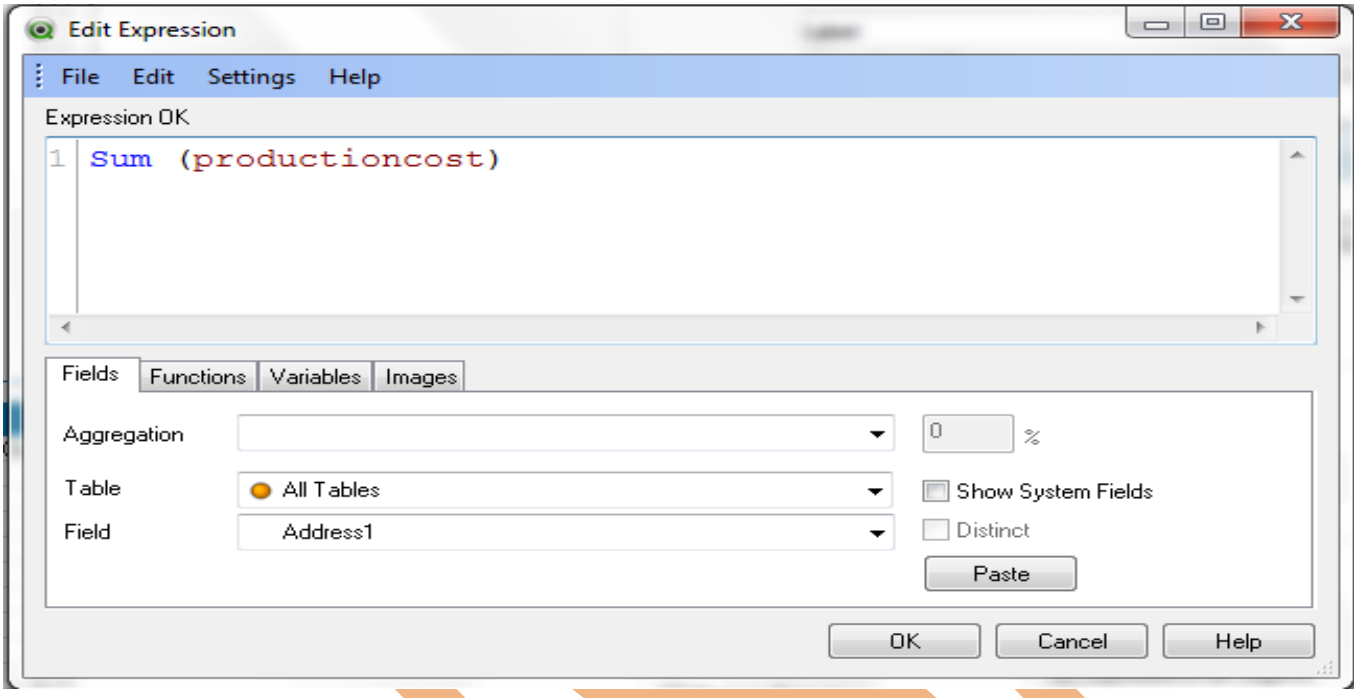
Calculation of the product cost of the product

It is require to calculate the product cost of each product to know the investment done on the product. For these types of calculation, we use the gauge chart. Here we have a gauge chart named as investment done on each product.

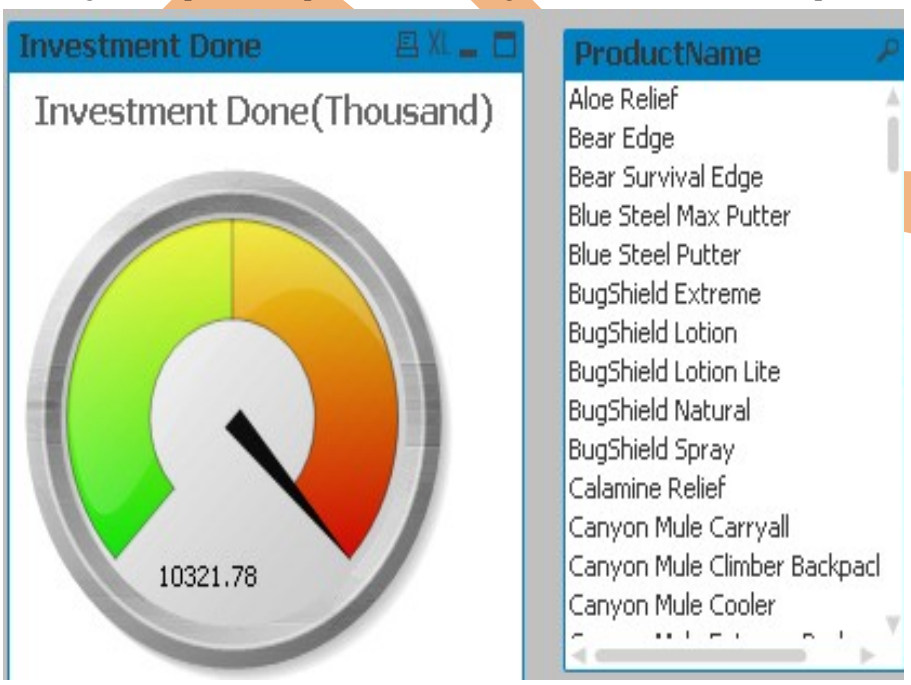


The value showing the production cost done alone with the products. The expression used here are the sum of production cost taken per product.

Go to the Expression tab and add the expression here as sum(Production cost) which give the result on invested amount on each of the product.

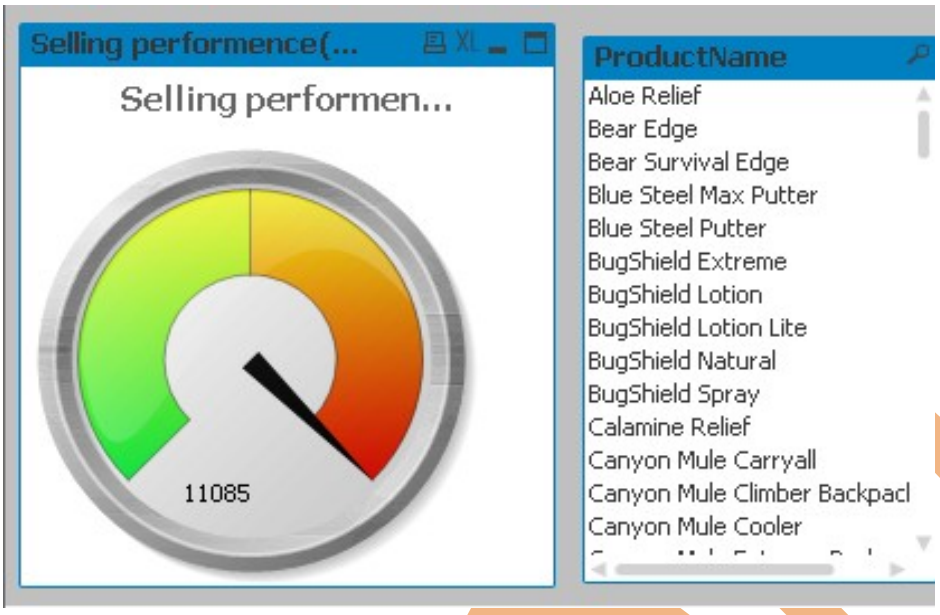


And we get the value varying according to the product name, for the product name we have used the list box by clicking on the particular product we will get the varied value of the production cost.



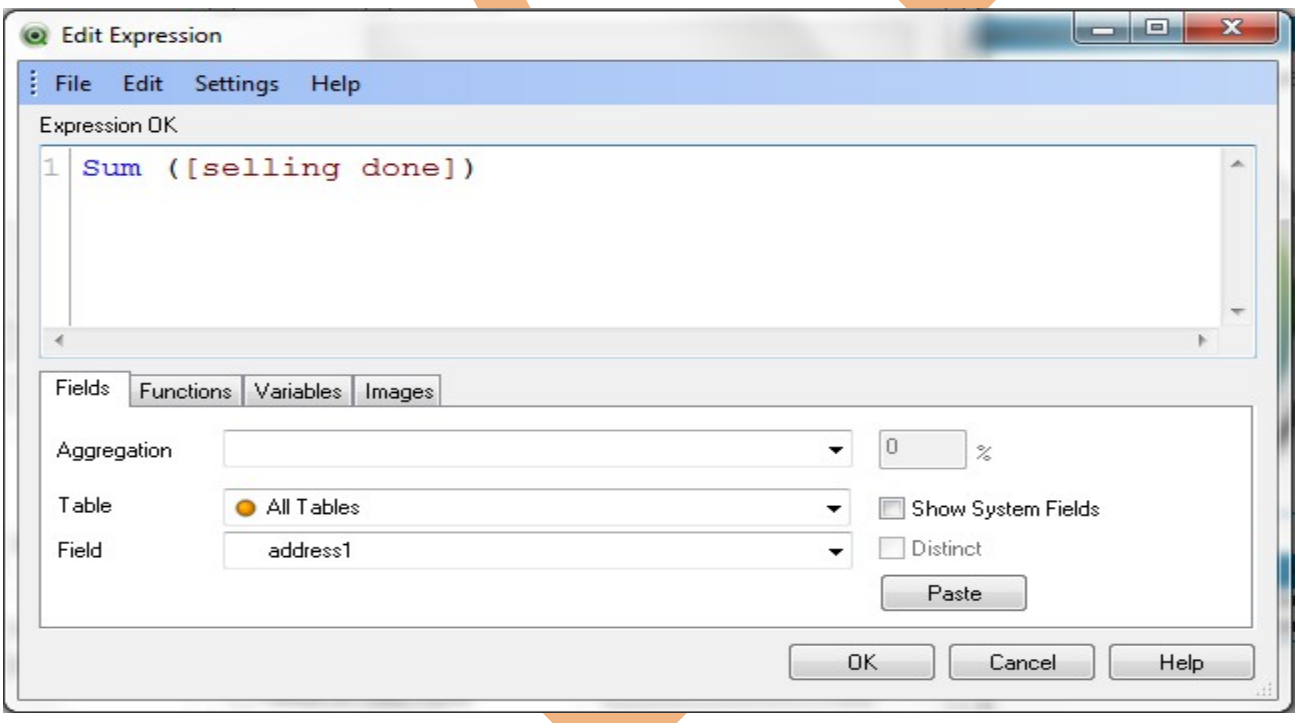
Calculations related to the selling of the product

For the calculation of the selling performance, we have taken one more gauge chart which gives the performance of selling for the product and also attached list-box which helps to find the selling cost, has been charged for each product.



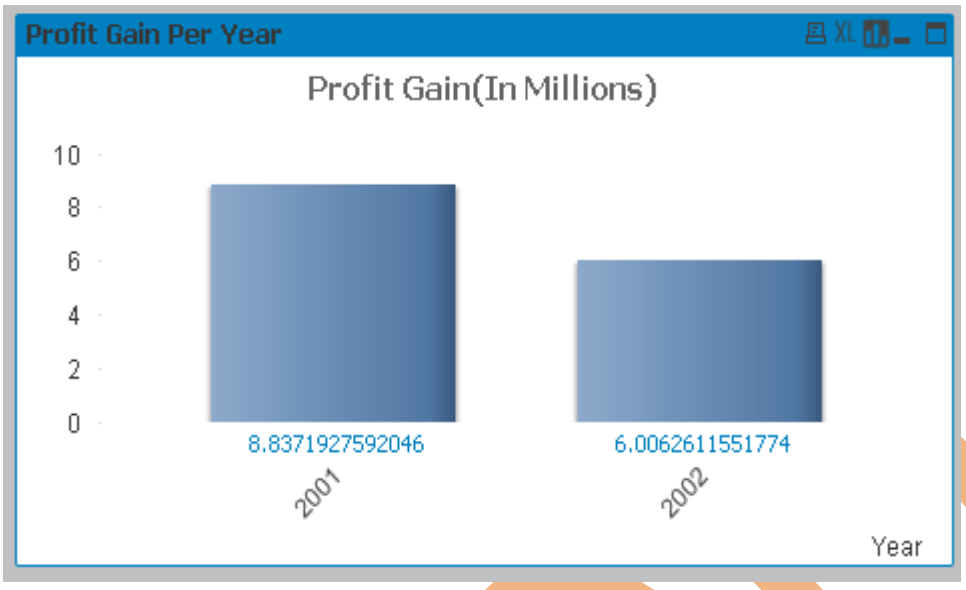
Here the expression taken for the gauge chart is Sum(Selling) and we take one value in the dimension infront for which we have to find the result (Product name).

The expression can be given by going to the expression tab and adding the expression here as shown.



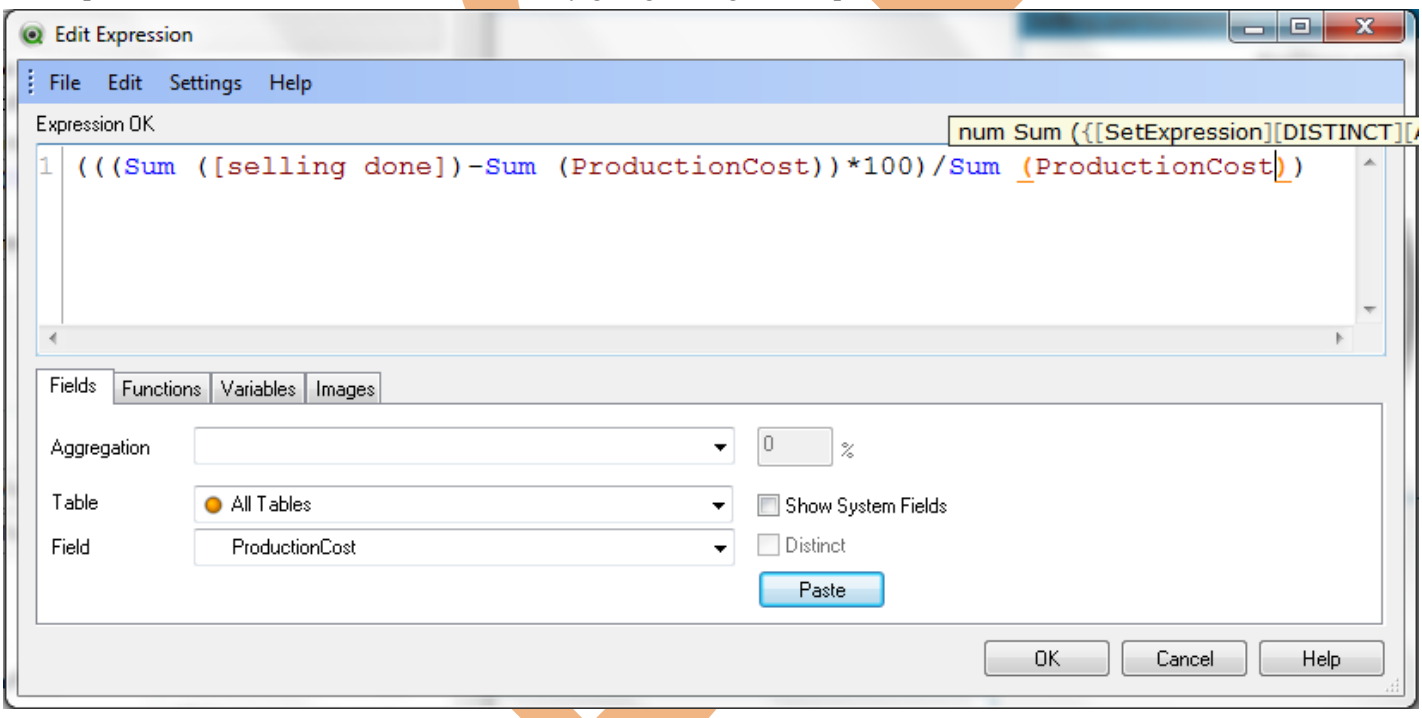
Calculation of profit

The main factor of any company's strategy includes the yearly profit gain on each product. By judging through this factor company decides compare the profit gain yearly.



As we look here the product's gain-profit is displayed here as we can see the profit gain of the two years 2001 and 2002 and we can do comparison between them here the gain of 2002 is less then the profit gain of 2001 .

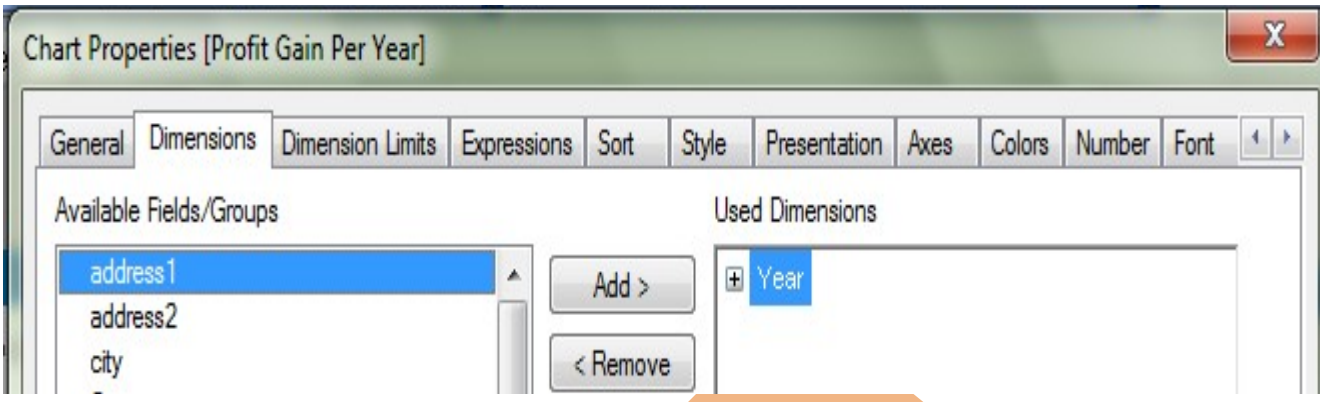
The expression we have used here can be seen by going through the expression tab.



Here we have taken the expression as

(((Sum ([selling done])-Sum (ProductionCost))*100)/Sum ([ProductionCost])

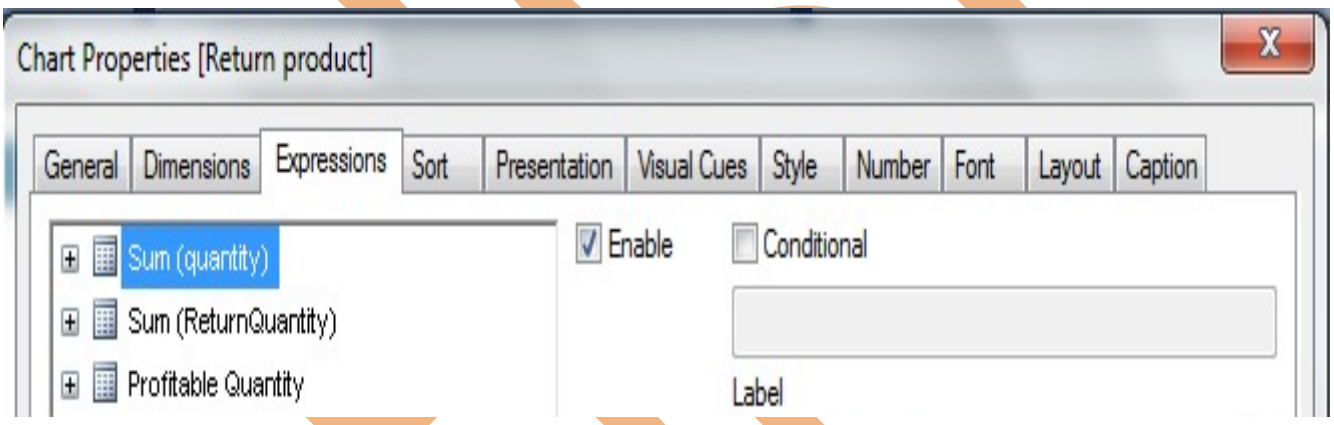
This expression gives the profit gain of each product yearly .We have take year in our dimension tab.



Calculations related to the returned quantity of the product

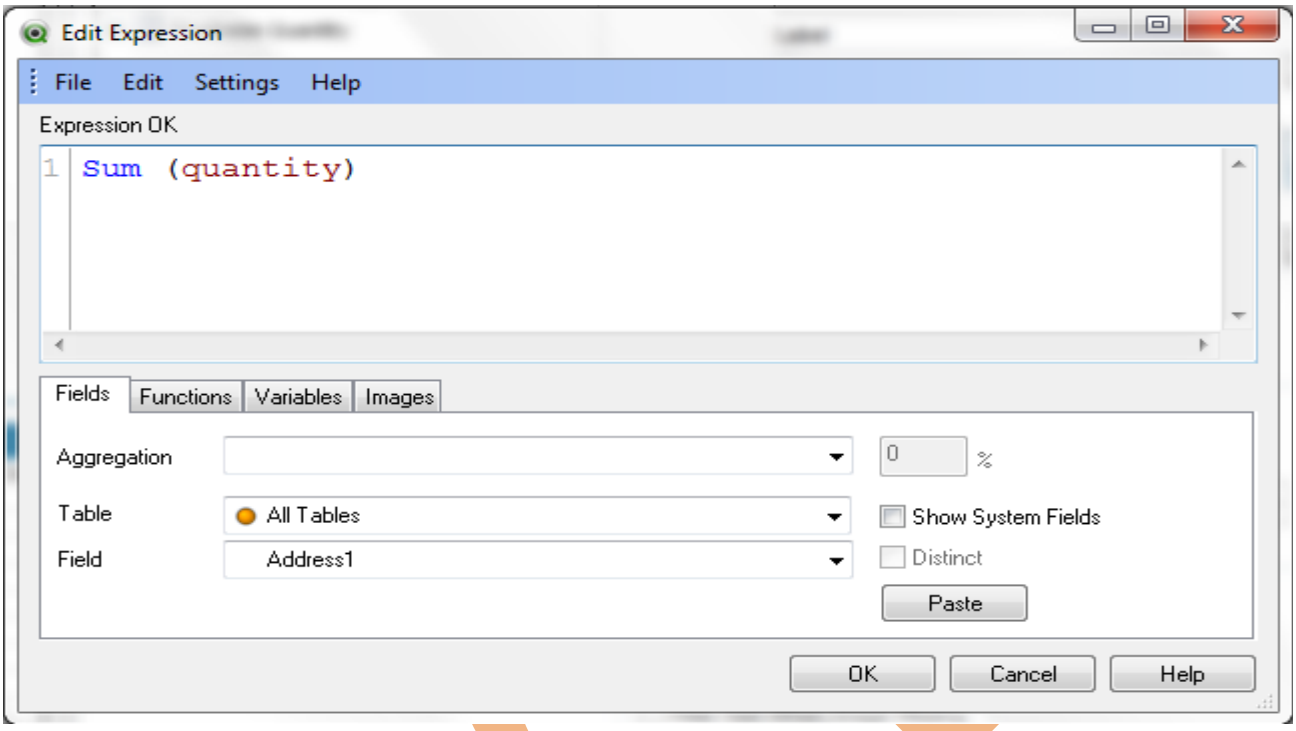
Now the focus should be on the reasons behind the decrease profit ratio of the year 2001 and what the factors responsible. If the company is responsible, then we need the ratio of **"Quantity of production"** of that particular product in that year and its "Returned Quantity". So we will choose a pivot table in which we will take three expressions .The measurement of the returned quantity of the product is most important because we should have the knowledge about how much quantity of that product is going to be a waste.

This is the pivot table from which we are getting the sum(Quantity), sum(ReturnQuantity) and according to the ratio as a result we get the Profitable Quantity. For creating this table go to the pivot table and the expression should be taken as shown below.

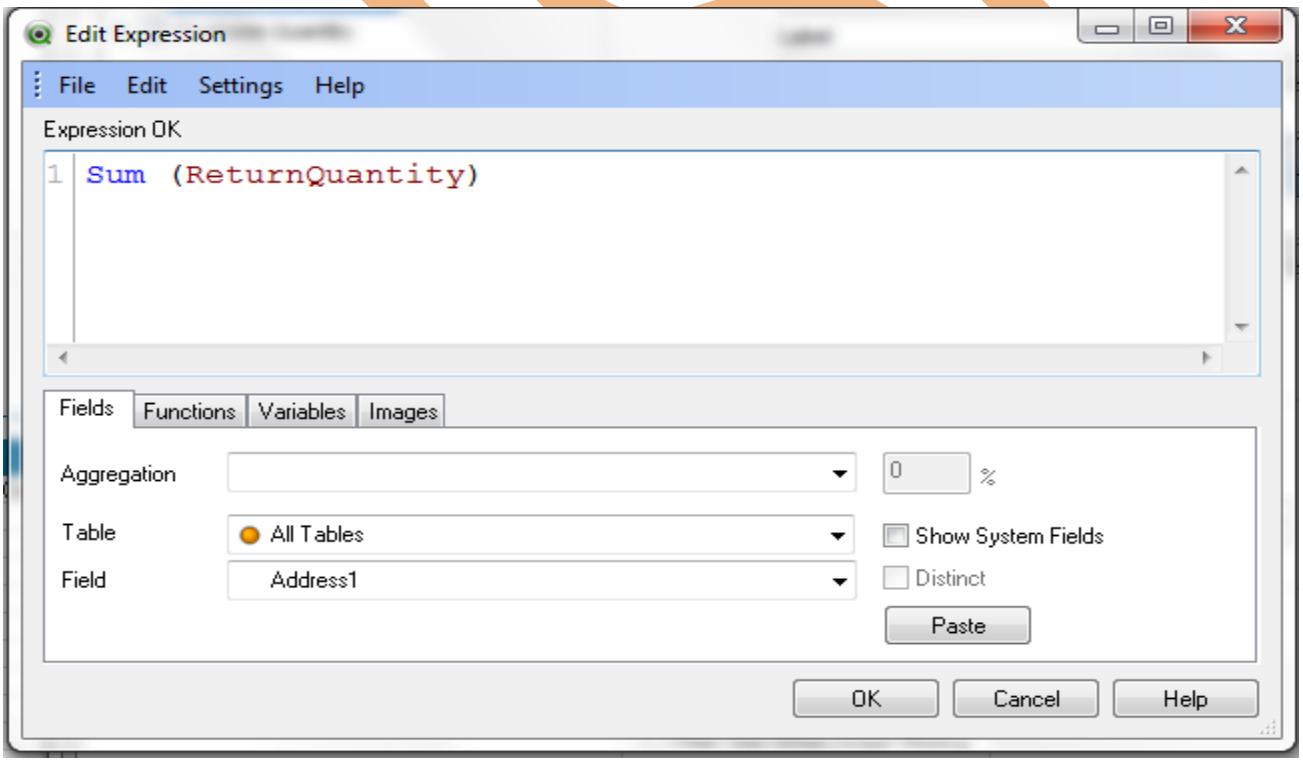


In the expression tab three expressions are taken which are Sum(quantity), Sum(ReturnQuantity) and Profitable Quantity.

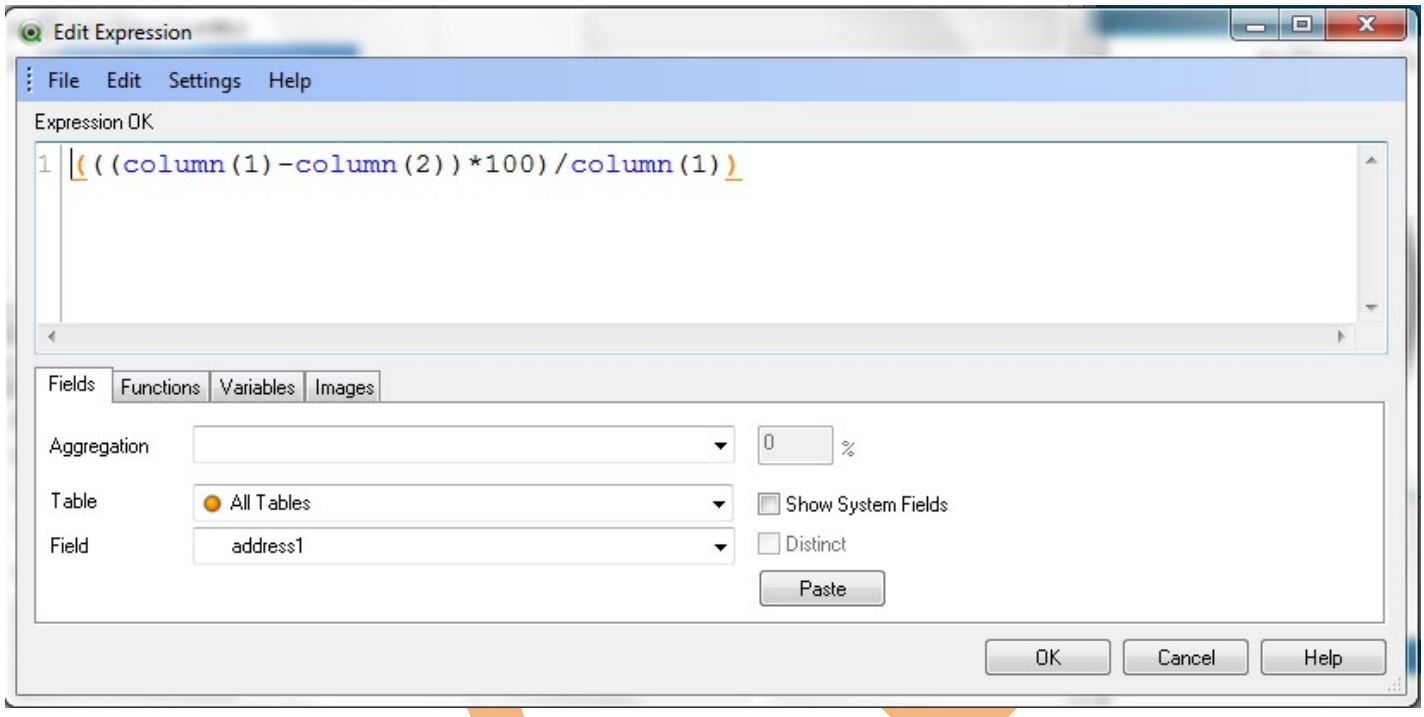
For this Quantity we have taken sum(quantity) which will tell us how much Quantity of the product is produced.



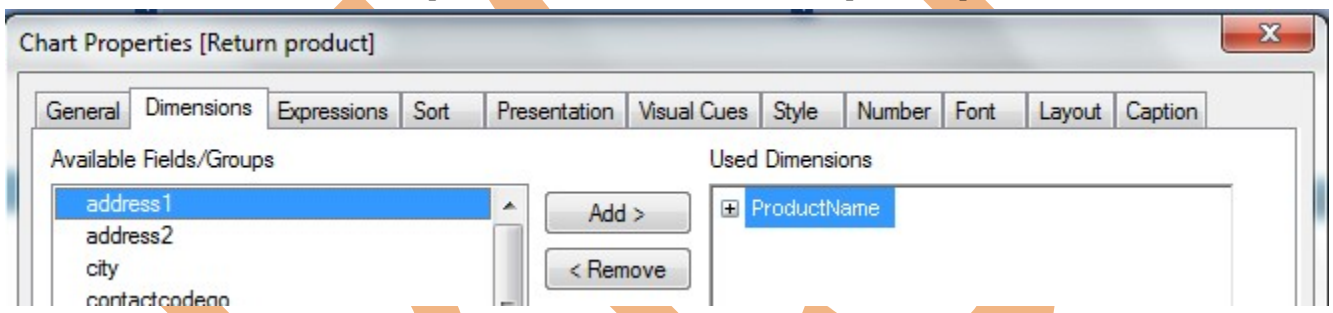
For the return quantity we have taken the sum(Return Quantity) which will tell us how much quantity was returned.



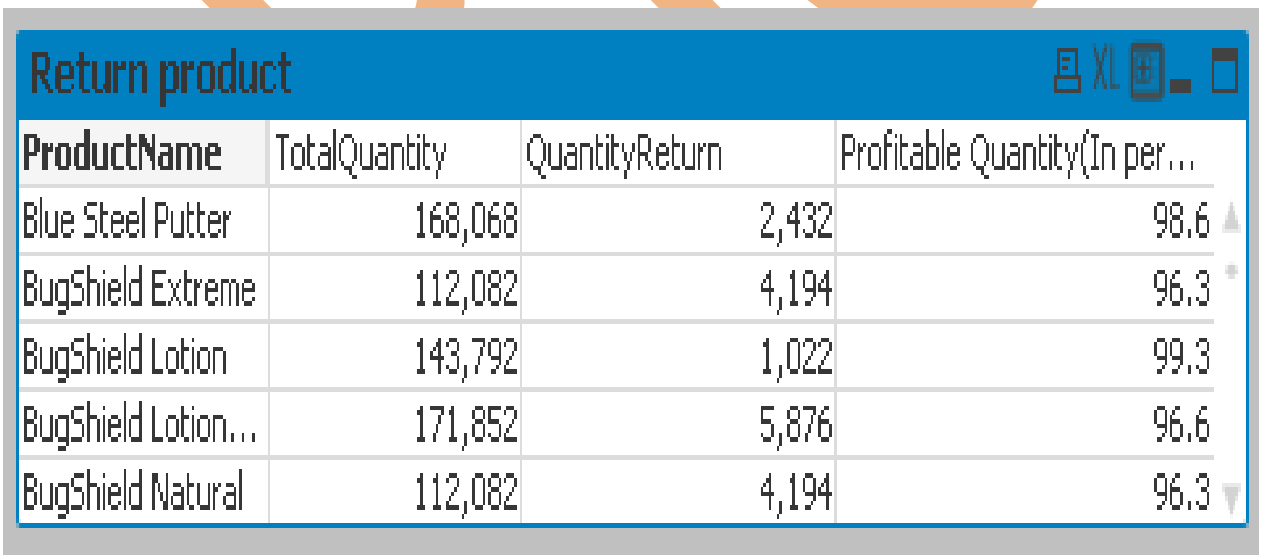
And for the profitable quantity we will remove the returned quantity from the total Quantity, and then by multiply with 100 and then the ratio of total will give percentage of the profitable quantity.



and the dimensions will be taken as productname because we find each product's performance.



Now Return Product table is here which gives all the information about the product.



Return product

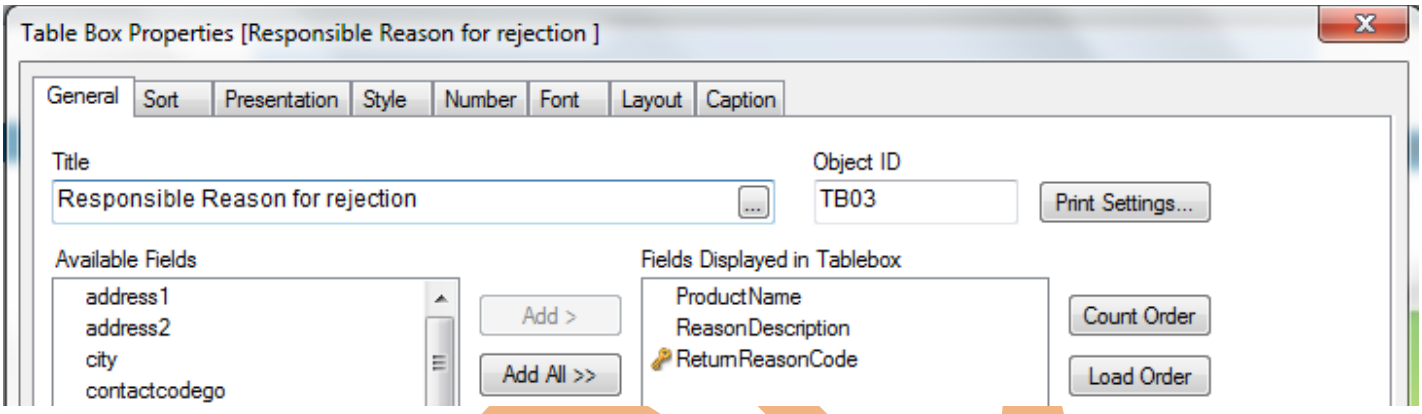
ProductName	TotalQuantity	QuantityReturn	Profitable Quantity(In per...
Blue Steel Putter	168,068	2,432	98.6
BugShield Extreme	112,082	4,194	96.3
BugShield Lotion	143,792	1,022	99.3
BugShield Lotion...	171,852	5,876	96.6
BugShield Natural	112,082	4,194	96.3

By taking the higher values of the return Quantity we will focus on the responsible reasons .

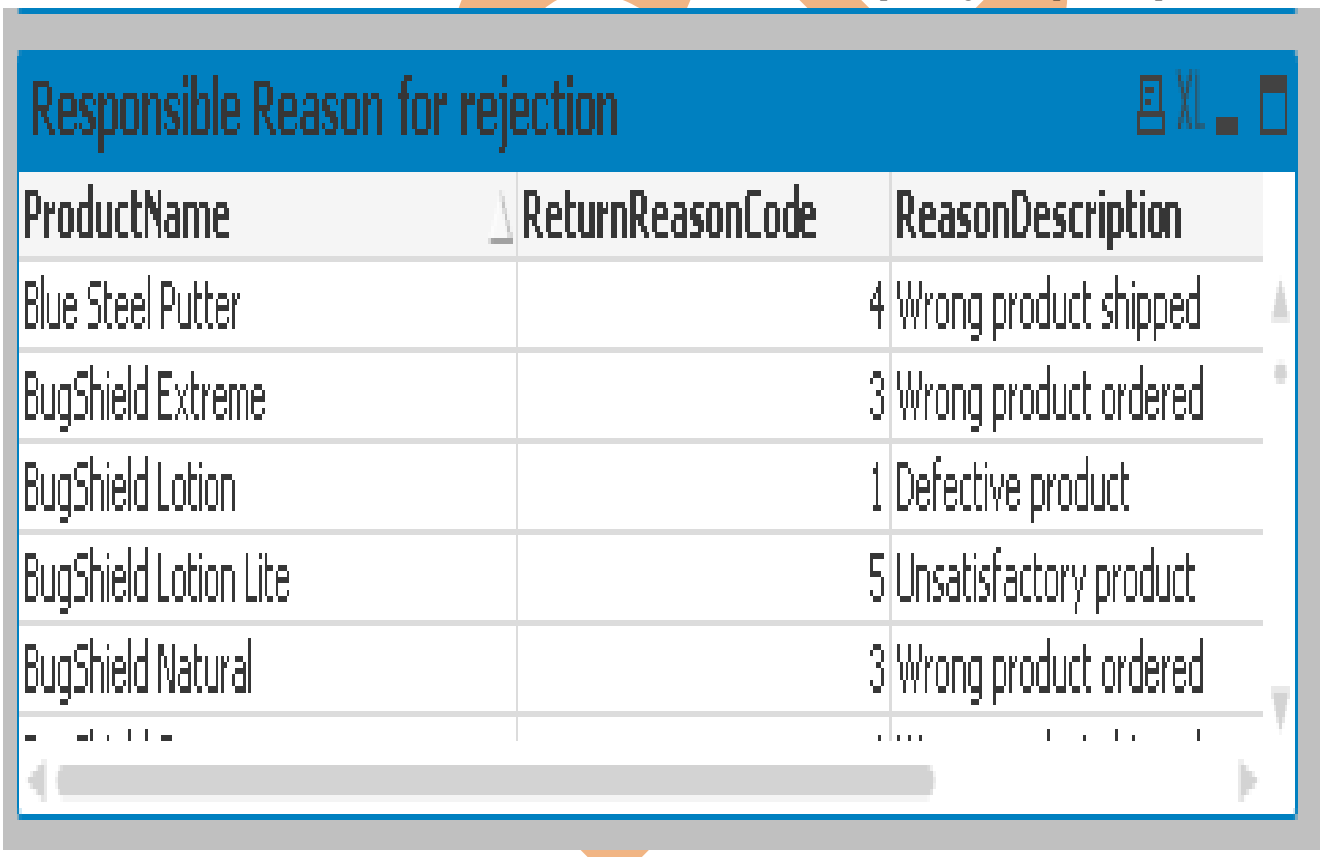
We can then rectify the responsible reasons. This will increase the company's satisfaction.

Listing the Responsible reason

For listing the responsible reason we will go through the table in which we have taken these fields.



We have to take the field Product name ,Return Reason code and its corresponding description responsible.



The table created here is telling the responsible reason for the particular products.

Per product margin

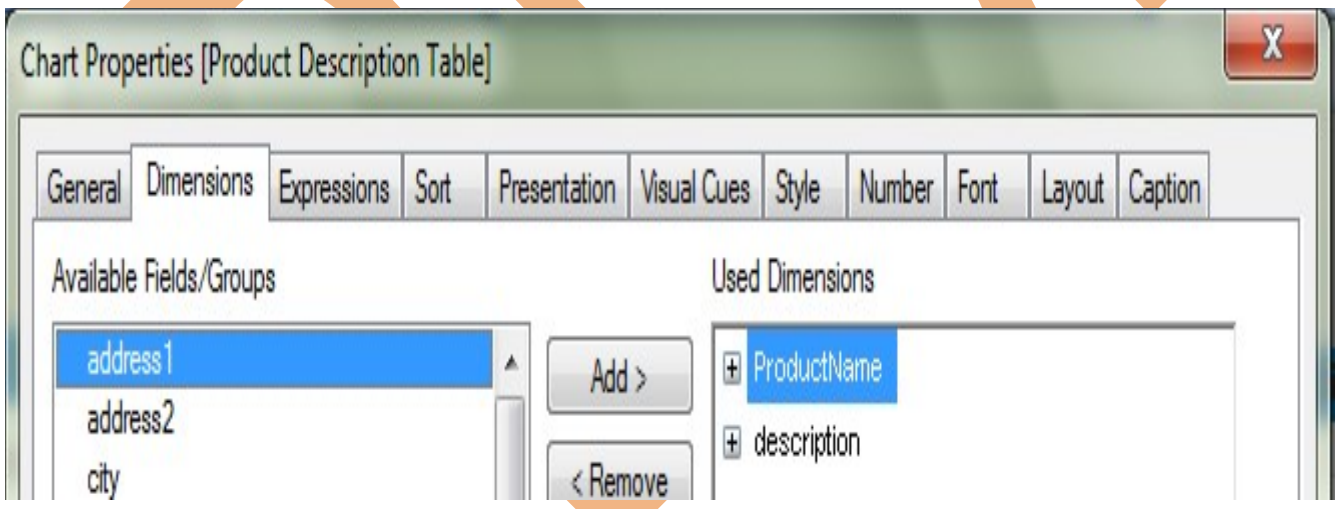
Now lets focus on the company's strategy for the margin given for each product.

Product Description ...

ProductName	Margin of pro...
Aloe Relief	0.6
Bear Edge	0.4
Bear Survival Edge	0.5
Blue Steel Max Putter	0.55
Blue Steel Putter	0.5
BugShield Extreme	0.63
BugShield Lotion	0.63
BugShield Lotion Lite	0.7
BugShield Natural	0.67
BugShield Spray	0.67
Calamine Relief	0.5
Canyon Mule Carryall	0.4
Canyon Mule Climber Bac...	0.17
Canyon Mule Cooler	0.2
Canyon Mule Extreme Ba...	0.43
Canyon Mule Journey Ba...	0.33
Canyon Mule Weekender...	0.33

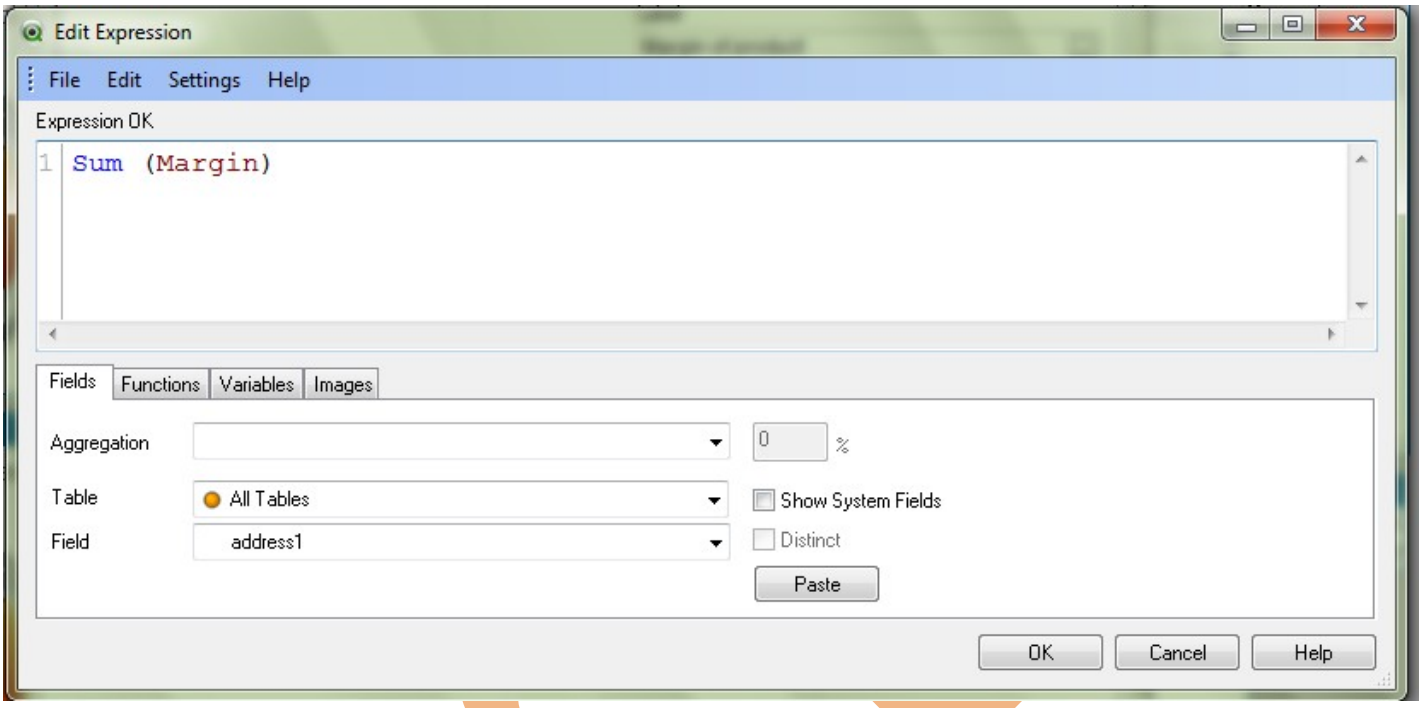
For this we have take the fields in pivot table which will tell the margin of each product and by exploring the option we can see the description for each product.

In dimension we have take these fields.

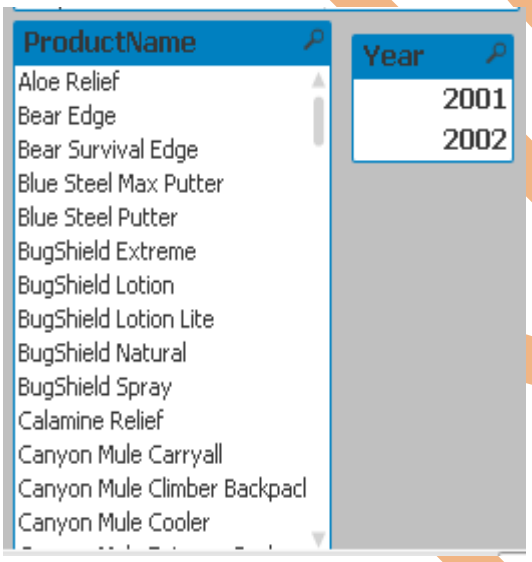


In this table we have taken the fields ProductName and description of the product use for.

For the calculation of margin we have take the expression as sum(margin).



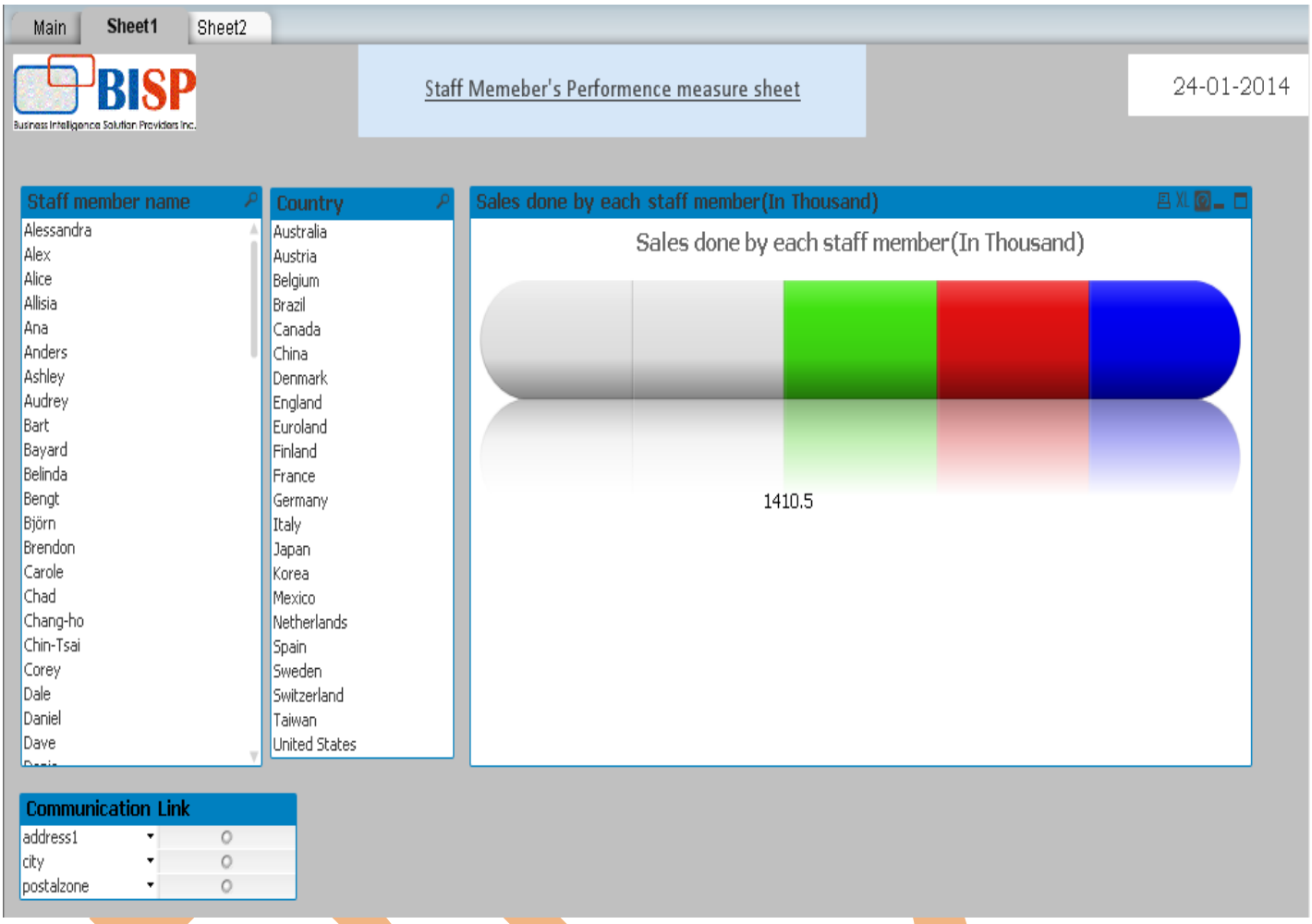
We have given two listbox in the sheet one is year and another one is product name through which we can perform the selection from the both objects.



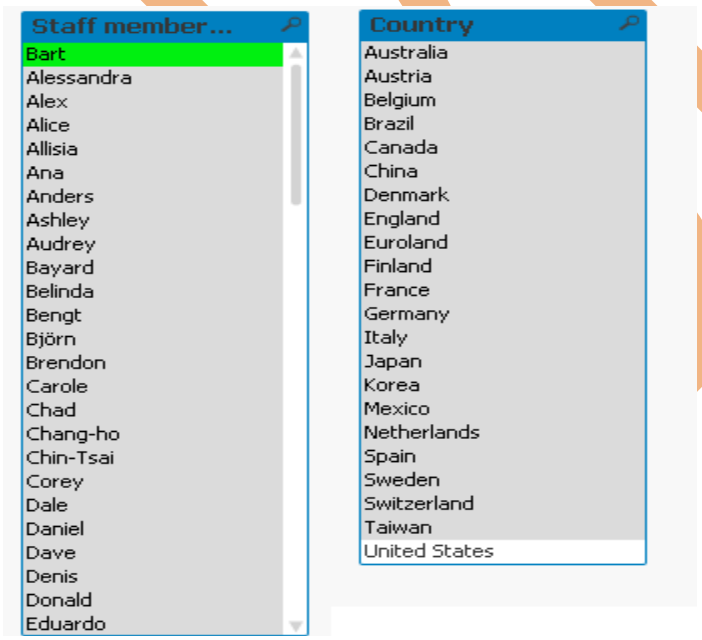
Staff Member's Performance measure sheet

Now lets switch to the performance sheet of the staff members.

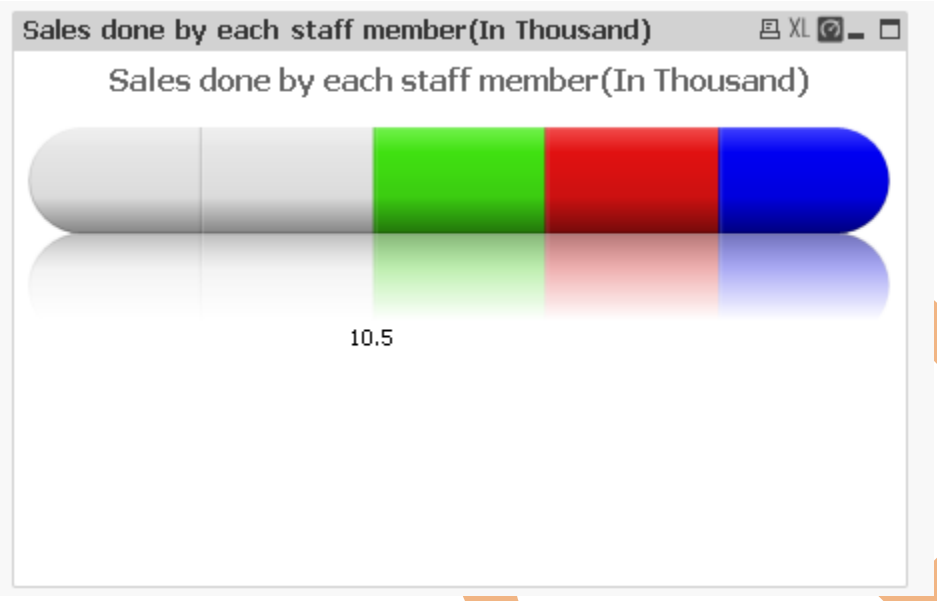
For checking each staff members performance we have to design a report which describes the contribution of each employee.



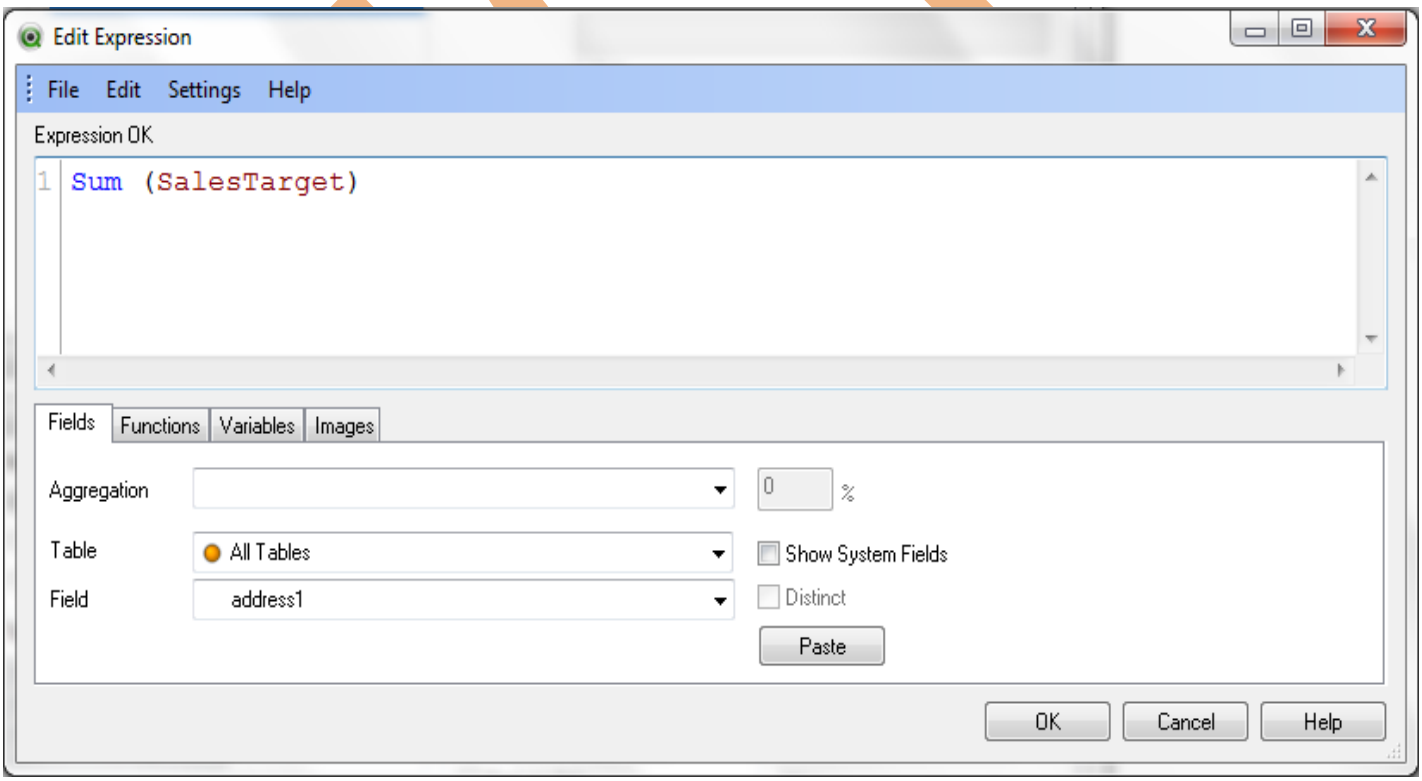
In this sheet we have taken two list for the selection of the data.



We have taken the Staff Member name who have contributed in the company's sales and the country to which he belongs. We can use its reverse as we can find for which company the particular staff member is working. To measure their performance we take a performance measure gauge chart.



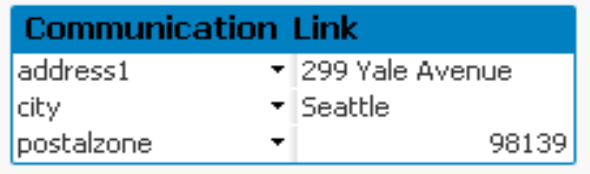
In this gauge chart we take the expression sum(Sales target) done.



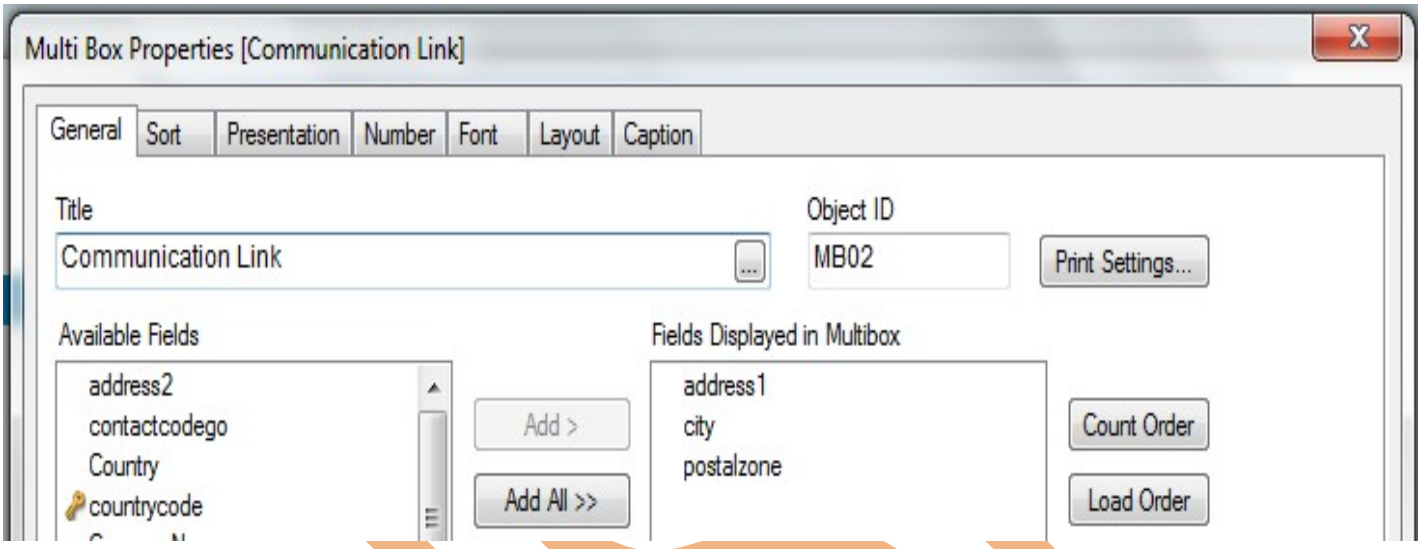
List Box for staff Info

by selecting via staff member list box we can measure the performance of each staff member.

For communicating with them we will create a multibox.



In this multibox the fields available are address, city and postal zone.



By exploring each field we can get the available results.