

# Data Analytics and Reporting Solution

## Introduction:

This project focused on building a comprehensive data analytics solution that integrates data from various sources including Five9, Google 360, Azure SQL Database, and Microsoft Dynamics 365. Microsoft Fabric's Lakehouse and Warehouse architecture were used to ingest, transform, and model data efficiently to support large-scale analytics workloads. The processed data was then used to develop robust and interactive Power BI reports that served as a centralized platform for all reporting and analytics needs. These reports offered deep insights into operational performance, customer interactions, marketing effectiveness, and sales trends. With features such as dynamic filters, time-based trend analysis, and export options, stakeholders were empowered to make data-driven decisions, monitor KPIs, and uncover actionable insights. By streamlining the end-to-end data pipeline, this solution significantly improved the organization's business intelligence capabilities, driving better strategy formulation, improved customer engagement, and increased operational efficiency.

## Targeted Customers

The target users for these Power BI reports include finance, sales, inventory, marketing teams, and senior management, each leveraging insights tailored to their functional needs. Finance teams validate and monitor Dynamics 365 data to ensure accuracy and support financial planning and compliance. Sales teams use dashboards to track performance, pipeline movement, and revenue targets. Inventory managers rely on real-time stock levels, order status, and supply chain trends to make informed decisions. The marketing team uses validated data from Traffic and campaign sources to measure performance, optimize outreach, and drive engagement. Senior managers and executives benefit from consolidated, high-level insights that aid strategic decision-making across departments..

## Client Details:

**Name:** Confidential | **Industry:** Ecommerce, Retail, Software | **Location:** USA

## Technologies:

Azure Fabric, SSIS, Azure Data Factory, Power BI, DAX

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## Project Description:

This project focuses on developing interactive and data-driven reports to help administrators, content creators, and business stakeholders gain insights into user engagement, content performance, and financial transactions. These reports enable data-driven decision-making by offering both tabular and graphical visualizations that provide a comprehensive view of platform performance.

## Key Report Pages & Insights

- **Accounting Page** – This page provides detailed visibility into accounts receivable and outstanding balances by store and patient. It includes roll-forward financial activity such as sales, payments, refunds, and insurance adjustments, along with balance tracking to monitor unpaid amounts across employees and order groups.
- **Call-Centre Page** – This page offers a comprehensive view of call center performance, tracking appointment trends, including no-shows and cancellations, with filters for agents, departments, and channels. It also monitors BPO production attendance with key metrics like ATT%, actual vs. target hours, and department-wise performance in areas such as acquisition, retention, and telemedicine.
- **Clinical Page** – This page provides an in-depth clinical performance overview, analyzing key metrics like exams, bookings, delays, and remakes across stores. It also includes FTC CL acknowledgement details, allowing tracking of patient exam data and order acknowledgements by store, brand, and company filters.
- **Executive Page** – This page delivers executive-level insights into appointment performance and digital marketing effectiveness. It highlights appointment trends against budgets across various timeframes and regions, while also tracking digital metrics like spend, impressions, clicks, conversions, and ROAS for both brand and non-brand campaigns.
- **Franchisee Store Page** – This page provides financial insights for franchisee stores, featuring hourly cash collection metrics like net sales, traffic, transactions, and goal comparisons. It also includes a royalty report detailing order-level financials such as tax, write-offs, advertising, and royalty contributions to assess store-level performance.
- **Marketing Page** – This page offers a marketing overview with insights into advertising performance and customer demographics. It highlights key metrics like net sales, traffic, leads, and spends, along with dynamic performance measures and detailed charts showing customer distribution by gender and age groups.
- **Operation Corp Page** – This page provides operational insights into clinical performance and employee-level discount activity. It tracks key clinical metrics like exams, sales, and appointments over time, while also analyzing discounts by employee, including promotion details, discount percentages, and their impact on net sales.

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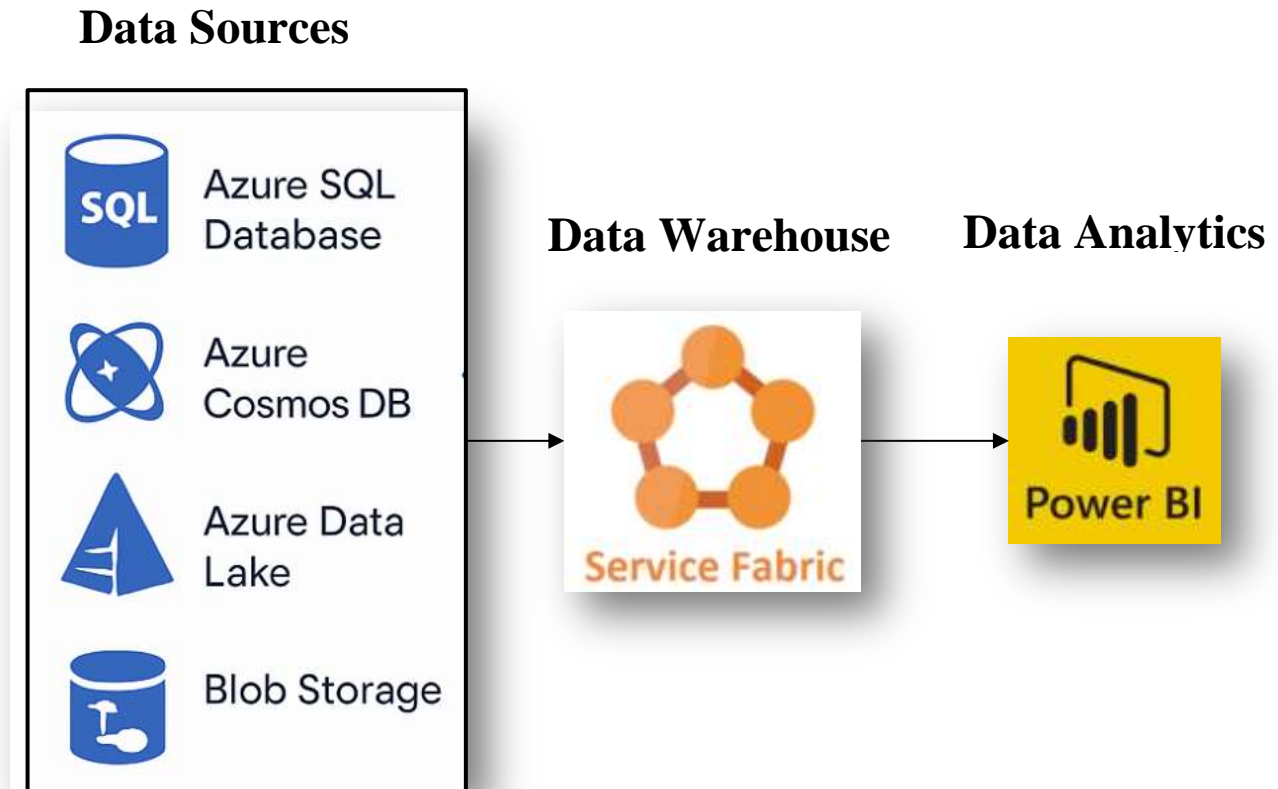
- **Operations District Page** - This page offers district-level operational insights, tracking clinical exam types and patient volume trends across stores. It also includes a detailed employee discount report, analyzing order-level financials such as net sales, cash collected, and adjustments to monitor performance and compliance at the store level.
- **Operations Store Page** - This page presents store-level operational performance, featuring clinical metrics like sales, exams, appointments, and conversion trends. It also includes a retail dashboard summarizing key financial figures across various timeframes (WTD, PTD, QTD, YTD) to evaluate overall store productivity.
- **Supply Chain Page** - This page delivers comprehensive visibility into daily supply chain performance and inventory status. It includes daily transaction trends, YoY comparisons, and detailed order data, along with an in-depth inventory on hand report covering store and distribution center fill rates, SKU availability, and stock-out metrics.

## Project Impact:

By consolidating key business and user engagement metrics, this reporting solution helps administrators make informed decisions, optimize content strategies, improve user retention, and maximize revenue opportunities. The use of interactive filters, slicers, and export features ensures seamless data exploration and reporting.

# Data Analytics and Reporting Solution

## Architecture Diagram:



## Data Analytics and Reporting Solution

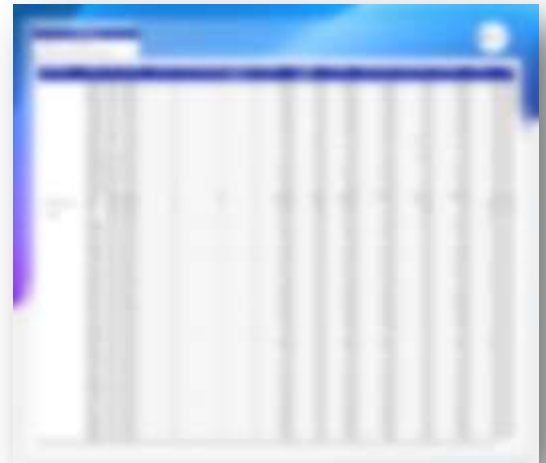
## Screenshots:

**Accounting Page:**

### Accounting - AR Roll Forward Detail by Patient-Store (S0)



Accounting - Balance



**Call Centre Page:**

### Call Centre - Appointment Dashboard (No Show - Cancellations)

## Call Center - BPO Production



# Data Analytics and Reporting Solution

## Clinical Page

Clinical - Clinical Analysis



Clinical - FTC CL

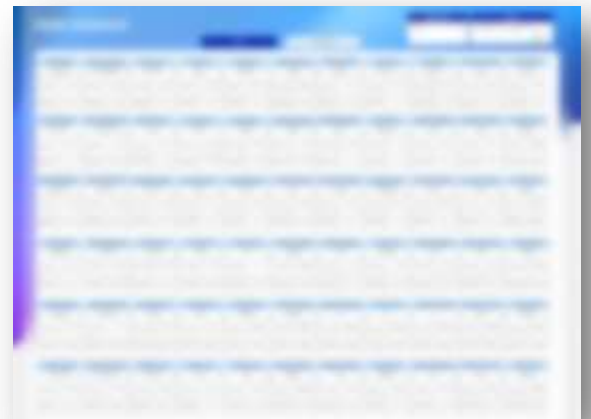


## Executive Page

Executive - 04 - Appointment Analysis



Executive - 05 - Digital



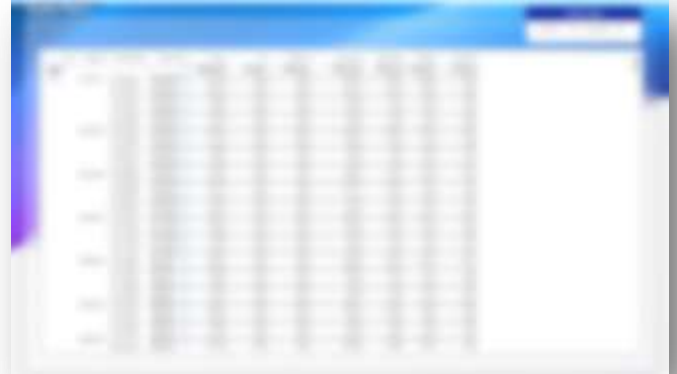
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## Franchisee Store Page

Franchisee Store - Cash Hourly Report



Franchisee Store - Royalty

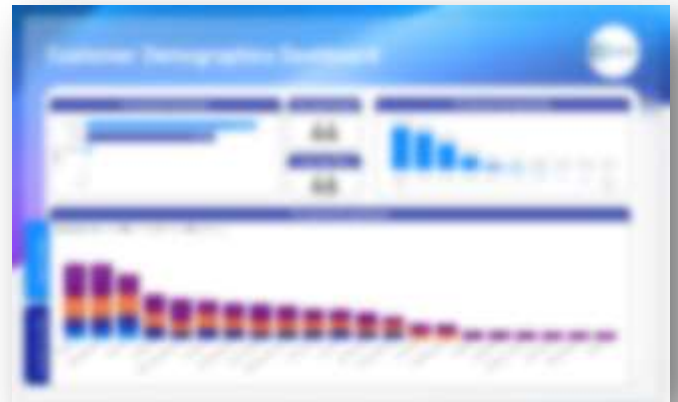


## Marketing Page

Marketing - Advertising Buy Sheet



Marketing - Customer



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**Operations Corp Page:**

# Operations Corp - Clinical Dashboard



Operations Corp - Discount by



**Operations District Page:**

District - Clinical Dashboard



### Operations District - Discount by Employee Report





# Data Analytics and Reporting Solution

## Operations Store Page:

Operations Store - Clinical Dashboard

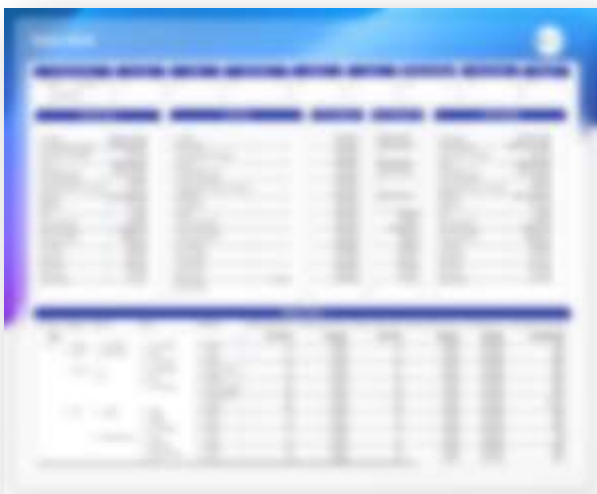


Operations Store - Retail



## Supply Chain Page:

Supply Chain - Daily Beat



Supply Chain - Inventory On

