

POWER BI DASHBOARD FOR QUOTATIONS

Client Overview

The client is an industrial equipment supplier headquartered in the **United Arab Emirates**, operating across multiple countries. The company supplies large-scale heaters and chillers and manages multi-currency pricing, quotations, and sales orders. An internal system maintains all transactional and master data, including country, region, currency, and price lists.

Introduction

Organizations generating quotations across CRM and ERP platforms often struggle with consistency and real-time visibility. To address this, a centralized dashboard was developed using **Microsoft Power BI** to provide a unified view of quotation data and improve decision-making through interactive analytics.

Problem Statement

- Quotation data stored in different systems without integration
- Inconsistent status definitions across departments
- Duplicate quotation entries affecting reporting accuracy
- Manual reporting delays
- Lack of real-time insights for management

These challenges made it difficult to track approvals and monitor performance effectively.

Process

- Extracted quotation data from CRM and ERP systems
- Cleaned and transformed data using ETL techniques
- Removed duplicate records through validation
- Standardized statuses as Approved, Pending, and Rejected
- Designed KPI dashboards and configured automated refresh

Workflow

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Data Extraction → Transformation & Cleansing → Integration into Power BI Model → Automated Validation → Visualization → Real-time Monitoring

Tech Stack

Power BI | .NET | SQL Server | CRM & ERP Systems | Scheduled Data Refresh

Outcome

- Centralized quotation management
- Improved reporting accuracy
- Real-time tracking of approvals
- Faster data-driven decision-making
- Reduced manual reporting efforts

Conclusion

The Power BI dashboard streamlined quotation management by integrating multiple systems into a single platform, enhancing efficiency and enabling informed business decisions through real-time insights.

