

# TASK 1 PERFORMANCE DASHBOARD USING EXCEL

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# STEP 1: ANALYZING GOALS & CLEANING DATA

- Project Goals: pivot tables to summarize key metrics (total revenue, units sold, monthly trends)
- Our Dataset consists of the 5 essential columns to perform the required operations (ID, Order Date, Quantity, Subcategory and Profit)
- We checked for duplicates, trimmed spaces and transformed the Order Date to date datatype.

1

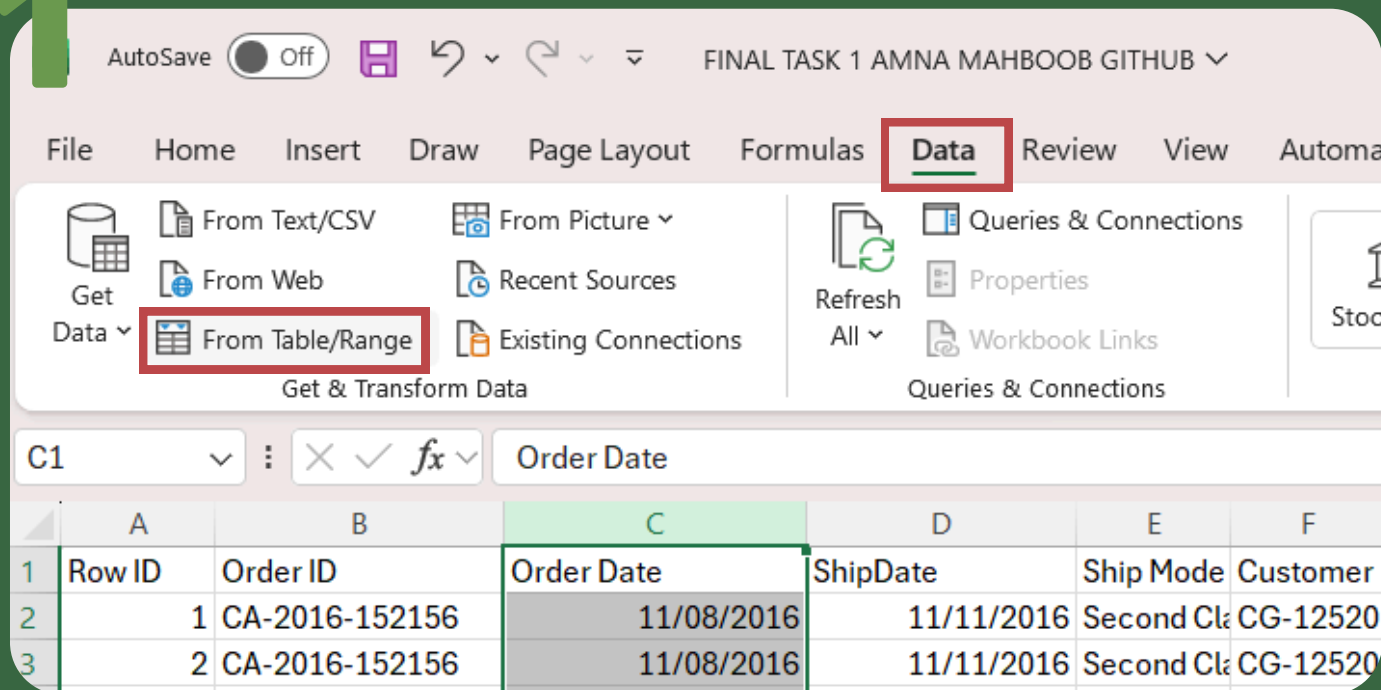
	A	B	C	D
1	Row ID	Order ID	Order Date	ShipDate
2	1	CA-2016-152156	11/08/2016	11/11/2016
3	2	CA-2016-152156	11/08/2016	11/11/2016
4	3	CA-2016-138688	06/12/2016	6/16/2016
5	4	US-2015-108966	10/11/2015	10/18/2015
6	5	US-2015-108966	10/11/2015	10/18/2015
7	6	CA-2014-115812	06/09/2014	6/14/2014
8	7	CA-2014-115812	06/09/2014	6/14/2014
9	8	CA-2014-115812	06/09/2014	6/14/2014
10	9	CA-2014-115812	06/09/2014	6/14/2014
11	10	CA-2014-115812	06/09/2014	6/14/2014
12	11	CA-2014-115812	06/09/2014	6/14/2014
13	12	CA-2014-115812	06/09/2014	6/14/2014
14	13	CA-2017-114412	4/15/2017	4/20/2017
15	14	CA-2016-161389	12/05/2016	12/10/2016
16	15	US-2015-118983	11/22/2015	11/26/2015

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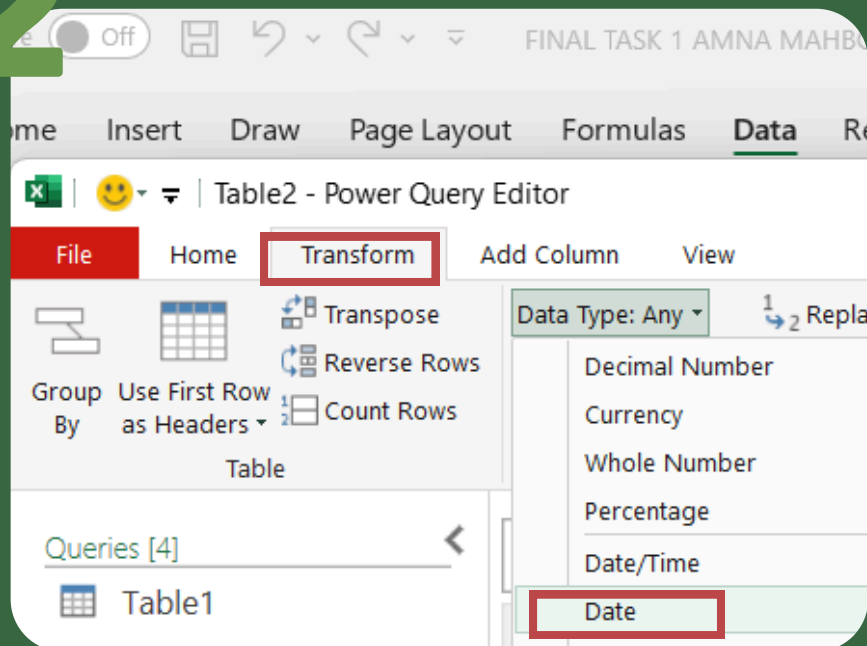
	A	B	C	D
1	Row ID	Order Date	Sub-Category	Quantity
2	1	11/08/2016	Bookcases	
3	2	11/08/2016	Chairs	
4	3	06/12/2016	Labels	
5	4	10/11/2015	Tables	
6	5	10/11/2015	Storage	
7	6	06/09/2014	Furnishings	
8	7	06/09/2014	Art	
9	8	06/09/2014	Phones	
10	9	06/09/2014	Binders	
11	10	06/09/2014	Appliances	
12	11	06/09/2014	Tables	
13	12	06/09/2014	Phones	
14	13	12/05/2016	Paper	
15	14	11/11/2014	Binders	

# STEP 1.1: FORMATING THE DATE IN ORDER TYPE

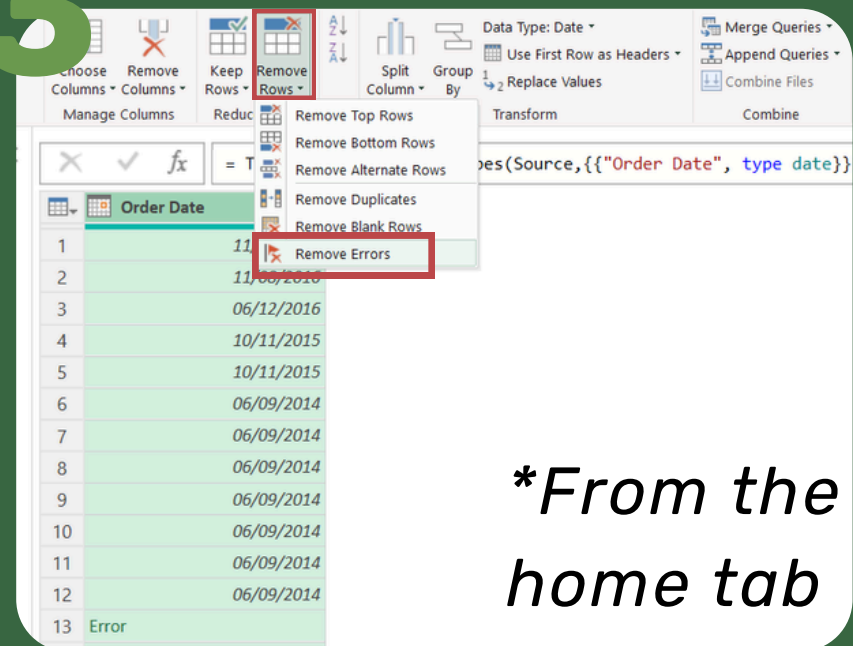
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3



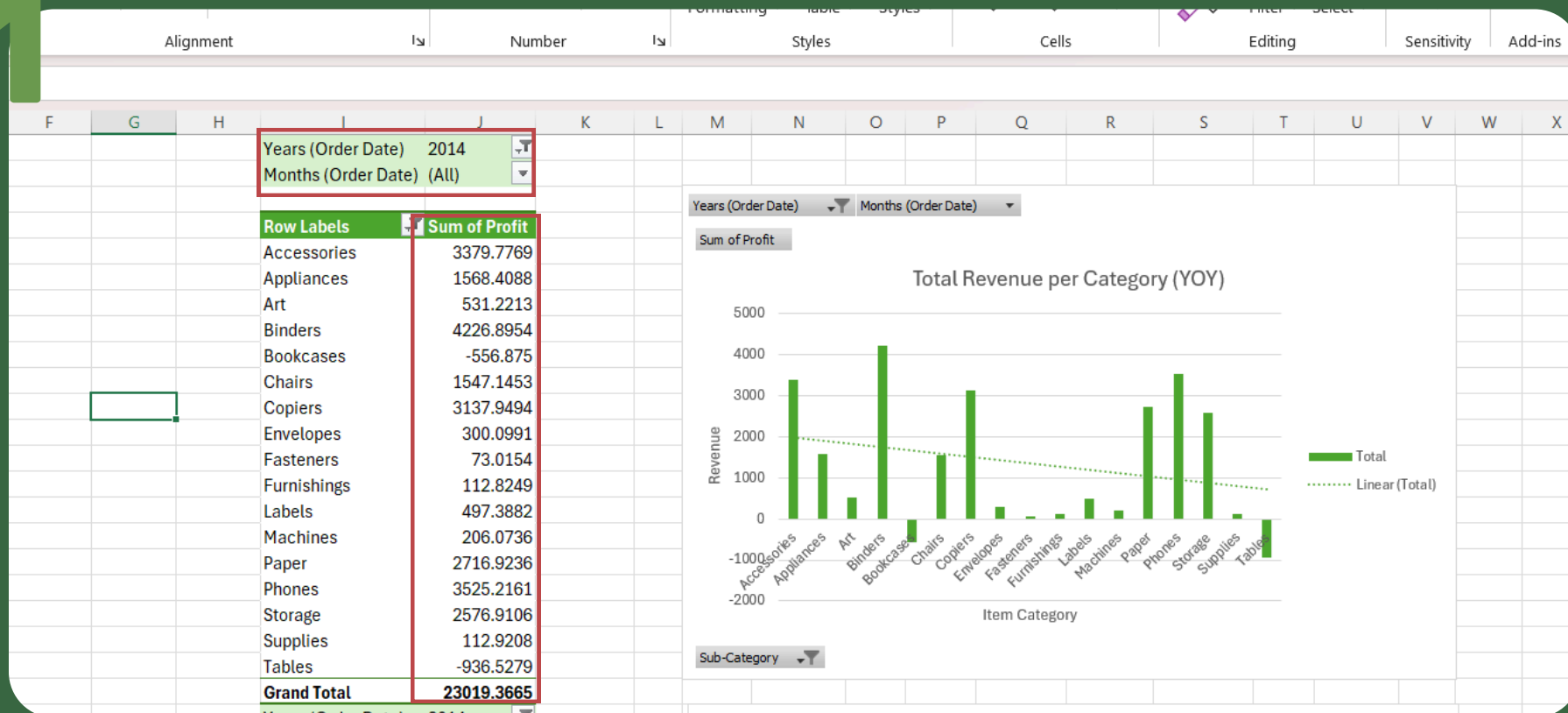
# STEP 2: CREATING A TABLE FROM THE DATASET

- Extract from original dataset to create a table in a sheet
- From the table create 2 pivot tables
- 1<sup>st</sup> pivot table is for calculating the total revenue per item in an year or month (filter option added)
- 2<sup>nd</sup> pivot table is for seeing the number of items sold per item category within an year or month (filter option added)

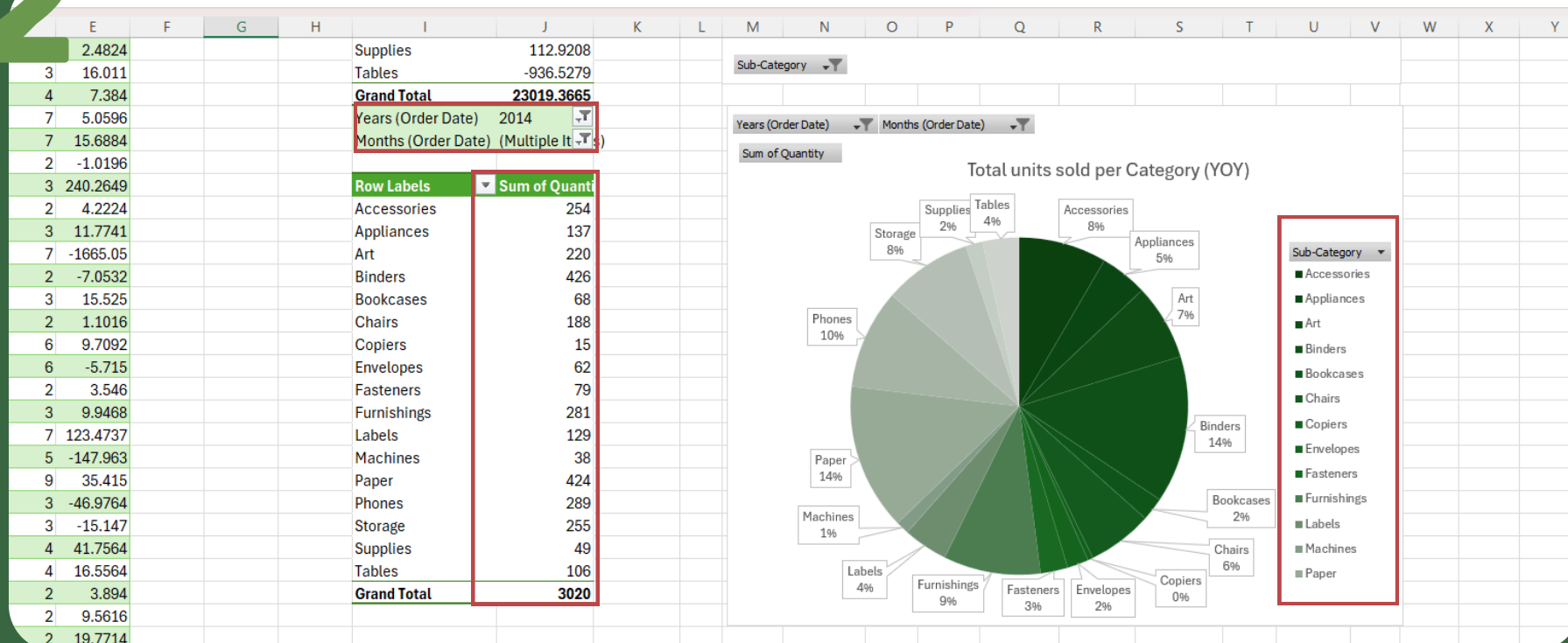
	A	B	C	D	E
1	Row ID ▼	Order Date ▼	Sub-Category ▼	Quantity ▼	Profit ▼
2	1	11/08/2016	Bookcases	2	41.9136
3	2	11/08/2016	Chairs	3	219.582
4	3	06/12/2016	Labels	2	6.8714
5	4	10/11/2015	Tables	5	-383.031
6	5	10/11/2015	Storage	2	2.5164
7	6	06/09/2014	Furnishings	7	14.1694
8	7	06/09/2014	Art	4	1.9656

# STEP 2.1: CREATING PIVOT TABLES

1



2





# STEP 3: ANALYZING TRENDS

Type of Trend	Total Revenue Trends	Quantity Sold Trends
Yearly Trend	2014-2017 Most sold = Phones (Approx. 18000 USD) 2 <sup>nd</sup> Most sold = Accesories (Approx. 17000 USD) Least sold = Tables (Approx. - 9000 USD) 2 <sup>nd</sup> Least sold = Machines (Approx. - 6000 USD)	2014-2017 Most sold = Bilnders (14-16%) 2 <sup>nd</sup> Most sold = Paper (9-11%) Least sold = Copies (0.5-1%) 2 <sup>nd</sup> Least sold = Machines (1-2%)
Future Suggestions	Do not stock in machines or tables as they are incurring loss, increase investment in phones and accesories as revenue is most generated	Stock on Blinders and papers more where as copies and machines should have their stock kept minimal as possible

