

## A Plus Holidays – Business Analyst Excel Assessment (Tabular Dashboard + Visual Cues)

### Duration

- Core: 30–45 minutes
- Extended: +15 minutes maximum

### Scenario

You are a Business Analyst at A Plus Holidays. You receive monthly booking and agent lists as CSVs. Build a refreshable, tabular dashboard to review agent-wise performance: bookings, revenue, payment status, cancellations, commissions, and month-over-month trends. All outputs must update when the source data is refreshed. Do not hardcode results.

### Files Provided

- Booking\_Data.csv (quarter-to-date bookings; intentionally contains data-quality issues)
- Agent\_List.csv (Agent, Commission %, Team/Manager)

### Core Deliverables (45 min)

#### 1) Data import and cleaning

- Import both CSVs; clean using repeatable steps: trim spaces, standardize dates to dd-mm-yyyy, normalize country names, remove duplicate Booking IDs, convert numeric text to numbers, standardize Payment Status values (Paid, Pending, Cancelled). Document steps in a Read Me sheet.
- Create clean tables: “01\_Data” (Bookings) and “02\_Lookups” (Agents).

#### 2) Data integration and commissions

- Map Commission % from Agent\_List to each booking via Lookup / INDEX (or equivalent).
- Add Commission Earned = Total Amount × Commission %.

#### 3) Tabular dashboard (primary)

Create a filterable performance table on “04\_Dashboard” with columns: Agent, Bookings, Revenue, Avg Revenue/Booking, Paid %, Cancellation %, Commission %, Commission Earned, AR Days, MoM %.

#### Interactivity and formatting:

- Add slicers/filters for Month, Country, Package Type, Payment Status.

- Apply visual cues (Paid %, Cancellation %, MoM % with symbols/colors).
- KPI tiles row above the table for Total Revenue, Avg Rev/Booking, Paid Bookings, Pending Bookings.

#### 4) Trend and time deltas

- Add helper table “03\_Measures” for monthly totals per Agent.
- Show MoM % in the dashboard table with ▲/▼ icons via conditional formatting.

5) Add a chart section below or next to the tabular dashboard to visualize key month-on-month metrics.

#### Charts Required:

- Agent-wise MoM Revenue Trend (Line or Column Chart)
  - X-axis: Month (Jan, Feb, Mar, ...)
  - Y-axis: Revenue (₹)
  - Series: Top 5 Agents by total revenue (dynamic based on slicer filters)
  - Visual cue: Upward trend = green line, downward = red line (optional)
- Paid % and Cancellation % by Agent (Clustered Bar Chart)
  - X-axis: Agent
  - Y-axis: Percentage (%)
  - Two bars per agent (bottom 5 agents)— Paid % and Cancellation %
  - Add data labels for quick readability

#### 6) Documentation and presentation

- Read Me sheet: assumptions, cleaning steps, named queries/tables, refresh instructions.
- Presentation: clear titles; consistent fonts/colors; gridlines off on dashboard; print area set to A4 landscape for WhatsApp sharing.

### Data-quality traps included

- Agent names with trailing spaces or inconsistent case (e.g., “Anil ”)
- Mixed country spellings (“UAE”, “United Arab Emirates”)
- Mixed date formats and text-dates
- Duplicate Booking IDs
- Payment Status variants (“paid”, “PAID”, blank)
- Amounts with embedded text (“45,000 INR”)

### Extended (+15 minutes strict)

E1: Tiered commission quick rule

- Effective Commission % per Agent per Month:
  - 5% base
  - 7% if monthly Agent Revenue > ₹10,00,000

Implement on a monthly aggregate table; use IFS or lookup-by-criteria.

E2: Payment aging snapshot (compact)

- Mini-matrix: Pending Amount by bucket (0–7, 8–15, 16–30, 31+ days). Use SUMIFS; apply color scale.

E3: Two insight bullets

- Provide two 1–2 line actions based on dashboard findings.

### Evaluation Criteria (Core)

Area	Weight	What We're Looking For
Dashboard & KPIs	30%	Correct metrics, dynamic filters, clear visuals
Data Cleaning	20%	Dedupe, standardize dates/status, numeric conversion
Refreshability	15%	One-click refresh, structured Power Query
Calculations	20%	Accurate XLOOKUP/SUMIFS, MoM %, AR Days
Communication	15%	ReadMe clarity, layout, A4 print setup

**15% bonus for Extended tasks E1–E3 (counted only if attempted; partial credit allowed)**

### Submission Instructions

- Submit Excel with sheets: ReadMe, 01\_Data, 02\_Lookups, 03\_Measures, 04\_Dashboard.
- Save as: FirstName\_LastName\_BA\_Assessment.xlsx.
- Ensure one-click Refresh updates all tables.
- Keep formulas visible and avoid hardcoding.