

SALES DASHBOARD

MINOR PROJECT REPORT

Submitted by

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ABSTRACT

This project, titled “**Sales Dashboard in Excel**,” focuses on transforming raw sales data into an organized, visual, and interactive dashboard using the tools available within Microsoft Excel. In any business, analyzing sales data is crucial for understanding customer behavior, monitoring performance, and making informed decisions. However, when the data is large and unstructured, it becomes difficult to process manually.

To solve this problem, we used Excel to build a dashboard that summarizes key business insights such as **total sales**, **monthly trends**, **region-wise sales**, and **top-performing products**. The dashboard provides an **interactive interface** where users can apply filters and instantly see updated visuals and metrics, helping them make data-driven decisions without needing any coding or technical expertise.

Key Excel tools like **Pivot Tables**, **Pivot Charts**, **Slicers**, **Formulas**, and **Conditional Formatting** were used to create a professional and fully functional dashboard. These tools help in cleaning, organizing, and analyzing the sales data effectively.

The goal of this project is to demonstrate how Microsoft Excel, a widely accessible and user-friendly tool, can be used for **business intelligence and performance monitoring**. It helps save time, reduce manual effort, and present complex information in a clear, easy-to-understand way.

INTRODUCTION

This project is ideal for small businesses, managers, students, and analysts who want to track sales performance and gain quick insights without investing in expensive data analytics software.

In today's digital and competitive business environment, **data plays a crucial role** in decision-making and strategic planning. Businesses generate large amounts of data daily, especially in the area of **sales and marketing**. Understanding this data is essential to track performance, identify growth opportunities, and improve overall efficiency. However, when the data is large and unorganized, it becomes very hard to analyze manually. This often leads to **delayed decisions, missed insights, and a lack of clarity** in business processes.

To address this problem, we have developed a project titled **"Sales Dashboard in Excel."** This project uses Microsoft Excel to build a fully functional and **interactive sales dashboard** that transforms raw sales data into **meaningful visuals and summaries**. It is designed to provide a clear view of key metrics such as **total sales, monthly trends, top products, and region-wise performance**. The dashboard allows users to easily filter data using slicers, view interactive charts, and gain valuable insights without any need for coding or technical skills.

Using tools like **Pivot Tables, Pivot Charts, Slicers, Formulas, and Conditional Formatting**, the dashboard brings life to boring and complex data. It helps businesses and users:

- Monitor real-time performance
- Compare sales across different months or regions
- Discover top-selling products
- Make faster and more informed decisions

TECHNIQUE USED

The best part is that this dashboard is **easy to use, cost-effective**, and **built using a software (Excel)** that is already widely used in organizations. It demonstrates how powerful Excel can be as a data analysis and visualization tool.

This project is built entirely using **Microsoft Excel**, which is a powerful and widely-used spreadsheet software. Even though Excel is often seen as just a tool for creating tables or simple calculations, it offers a range of advanced features that allow users to perform **data analysis, visualization**, and even create **interactive dashboards**.

Below are the main technologies and tools used in the project:

❑ Microsoft Excel

- The core platform used for building the dashboard.
- Used for data input, storage, analysis, and visual output—all in one file.

❑ Formulas and Functions

- Excel functions like SUM, AVERAGE, OFFSET, VLOOKUP, TEXT, and RANK were used for calculations, formatting, and data manipulation.
- These functions help to automate data handling and reduce manual errors.

📊 Pivot Tables

- Used to summarize large sets of raw sales data into meaningful insights.
- Help in grouping, filtering, and comparing values such as total sales, product performance, and regional trends.

📈 Pivot Charts

- Provide graphical representations of the summarized data.
- Include column charts, line charts, pie charts, and bar charts to represent trends and comparisons clearly.

🔍 Slicers

- Slicers are interactive filters that allow users to dynamically change the view of the dashboard by selecting specific months, regions, or product categories.
- They make the dashboard more interactive and user-friendly.

SALES DASHBOARD DATA

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	DATE	PRODUCT ID	QUANTITY	SALE TYPE	PAYMENT MOD	DISCOUNT %	PRODUCT	CATEGORY	UOM	BUYING PRICE	SELLING PRICE	TOTAL BUYING PRICE	TOTAL SELLING PRICE	DAY	MONTH	YEAR
2	01-03-2022	P0028	50	Wholesaler	Online	34.00%	Product28	Category04	No.	15	15	750	495	01	Mar	2022
3	02-03-2022	P0001	15	Online	Cash	9000.00%	Product01	Category01	Kg	100	103.88	1500	-138679.8	02	Mar	2022
4	03-03-2022	P0013	6	Direct Sales	Cash	0.00%	Product13	Category02	Kg	112	122.08	672	732.48	03	Mar	2022
5	04-03-2022	P0004	5	Direct Sales	Online	0.00%	Product04	Category01	Lt	44	48.84	220	244.2	04	Mar	2022
6	05-03-2022	P0035	12	Online	Online	0.00%	Product35	Category04	No.	5	6.7	60	80.4	05	Mar	2022
7	06-03-2022	P0031	1	Direct Sales	Cash	0.00%	Product31	Category04	Kg	93	104.16	93	104.16	06	Mar	2022
8	07-03-2022	P0003	8	Direct Sales	Cash	0.00%	Product03	Category01	Kg	71	80.94	568	647.52	07	Mar	2022
9	08-03-2022	P0025	4	Direct Sales	Online	0.00%	Product25	Category03	No.	7	8.33	28	33.32	08	Mar	2022
10	09-03-2022	P0037	3	Direct Sales	Cash	0.00%	Product37	Category05	Kg	67	85.76	201	257.28	09	Mar	2022
11	10-03-2022	P0014	4	Wholesaler	Online	0.00%	Product14	Category02	Kg	112	146.72	448	586.88	10	Mar	2022
12	11-03-2022	P0042	4	Direct Sales	Online	0.00%	Product42	Category05	Ft	120	162	480	648	11	Mar	2022
13	12-03-2022	P0042	10	Online	Cash	0.00%	Product42	Category05	Ft	120	162	1200	1620	12	Mar	2022
14	13-03-2022	P0044	13	Direct Sales	Online	0.00%	Product44	Category05	Kg	76	82.08	988	1067.04	13	Mar	2022
15	14-03-2022	P0023	3	Online	Cash	0.00%	Product23	Category03	Ft	141	149.46	423	448.38	14	Mar	2022
16	15-03-2022	P0035	6	Direct Sales	Cash	0.00%	Product35	Category04	No.	5	6.7	30	40.2	15	Mar	2022
17	16-03-2022	P0034	4	Direct Sales	Cash	0.00%	Product34	Category04	Lt	55	58.3	220	233.2	16	Mar	2022
18	17-03-2022	P0020	4	Direct Sales	Cash	0.00%	Product20	Category03	Lt	61	76.25	244	305	17	Mar	2022
19	18-03-2022	P0004	15	Wholesaler	Cash	0.00%	Product04	Category01	Lt	44	48.84	660	732.6	18	Mar	2022
20	19-03-2022	P0003	9	Direct Sales	Online	0.00%	Product03	Category01	Kg	71	80.94	639	728.46	19	Mar	2022
21	20-03-2022	P0042	6	Direct Sales	Online	0.00%	Product42	Category05	Ft	120	162	720	972	20	Mar	2022
22	21-03-2022	P0034	6	Direct Sales	Cash	0.00%	Product34	Category04	Lt	55	58.3	330	349.8	21	Mar	2022
23	01-03-2022	P0035	7	Direct Sales	Online	0.00%	Product35	Category04	No.	5	6.7	35	46.9	01	Mar	2022
24	02-03-2022	P0031	14	Direct Sales	Online	0.00%	Product31	Category04	Kg	93	104.16	1302	1458.24	02	Mar	2022
25	03-03-2022	P0044	9	Wholesaler	Cash	0.00%	Product44	Category05	Kg	76	82.08	684	738.72	03	Mar	2022
26	04-03-2022	P0006	7	Online	Cash	0.00%	Product06	Category01	Kg	75	85.5	525	598.5	04	Mar	2022
27	05-03-2022	P0001	7	Online	Online	0.00%	Product01	Category01	Kg	100	103.88	700	727.16	05	Mar	2022

DEMO AND CODE

This project is created using Microsoft Excel without any programming. The Excel file itself acts as both the demo and the code.

◆ Demo Features:

- View key sales info like Total Sales, Top Products, and Region-wise Performance.
- Use Slicers to filter data by Month, Region, or Product Category.
- Charts and metrics update instantly based on selections.
- Visual trends shown using Bar, Line, and Pie Charts.
- Conditional Formatting highlights top or low performers.
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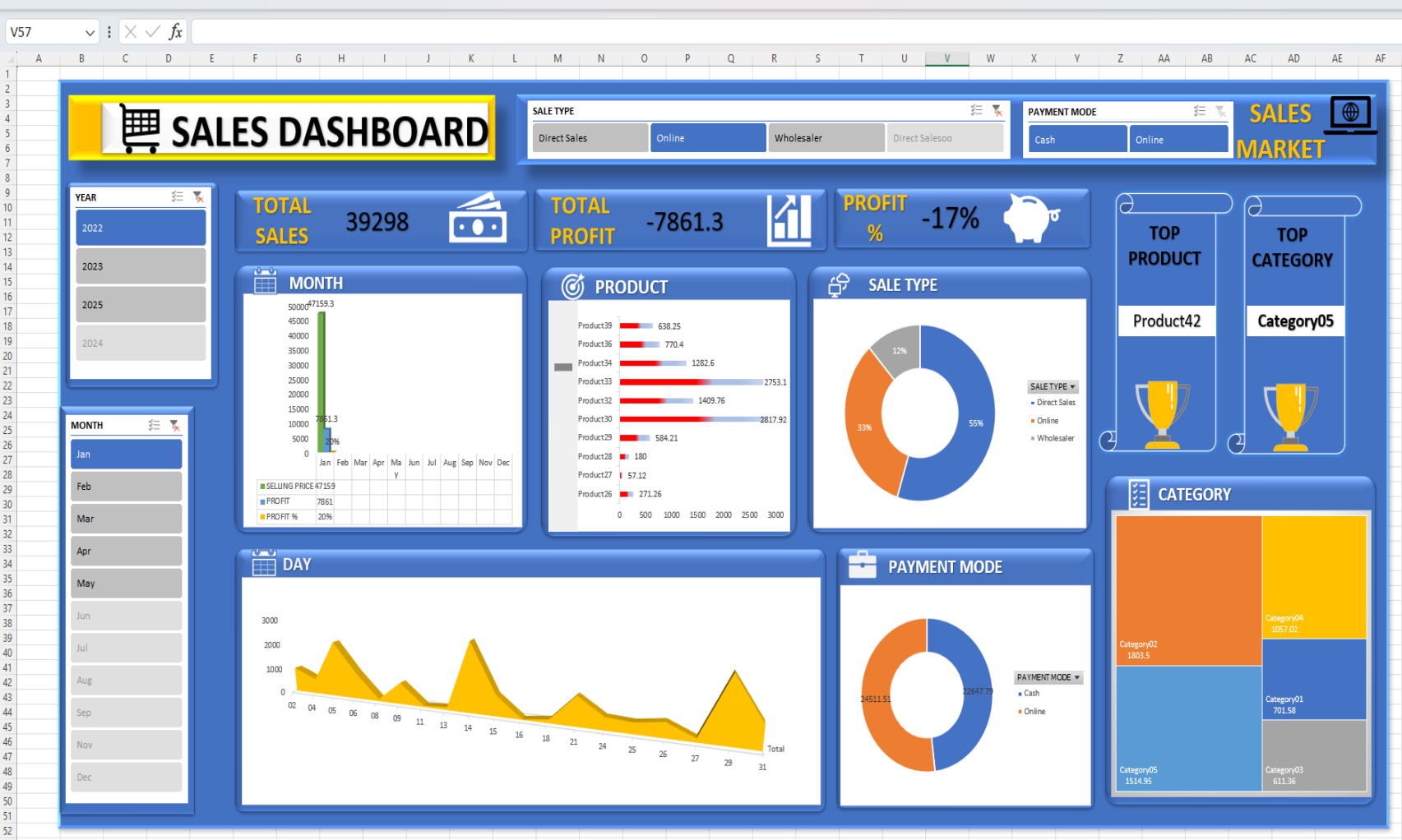
◆ Code Logic in Excel:

- Formulas like SUM, IF, VLOOKUP, RANK, OFFSET used for calculations.
- Pivot Tables summarize large data into meaningful insights.
- Pivot Charts visualize sales trends and comparisons.
- Slicers act as filters to make the dashboard interactive.
- Data Cleaning Tools like Remove Duplicates, Text to Columns used to clean raw data.

◆ Structure:

- Raw Data Sheet – Contains the original dataset.
- Pivot Table Sheet – Summarized data.
- Dashboard Sheet – Interactive visuals and metrics.

DASHBOARD








CONCLUSION

The Sales Dashboard in Excel project successfully demonstrates how powerful and insightful data analysis can be achieved using just Microsoft Excel. In today's data-driven world, businesses need quick and clear insights to make smart decisions, and this dashboard provides exactly that—without requiring any programming skills or expensive analytics tools.

By using Excel's built-in features like Pivot Tables, Pivot Charts, Formulas, Slicers, and Conditional Formatting, we transformed plain, raw sales data into a dynamic, interactive, and professional dashboard. Users can filter data based on specific months, regions, or product categories and instantly view updated charts and metrics. This interactivity makes it much easier to understand trends, compare performance, and make data-backed decisions.

The project proves that Excel is more than just a spreadsheet tool—it can serve as a powerful platform for data visualization and business intelligence, especially for individuals and small businesses with limited resources.

Some key benefits highlighted through this project:

-  Easy to use and requires no programming
-  Time-saving and reduces manual errors
-  Delivers clear and meaningful insights
-  Cost-effective and widely accessible
-  Automatically updates based on filters and data changes

This dashboard can be further customized or scaled to suit different types of businesses and data sets. It serves as a practical, real-world example of how to convert raw data into valuable business tools using simple yet powerful Excel techniques.