Designing A Sales Dashboard Using Excel

Objective:
Design a sales dashboard that analyzes the sales based on various product categories. The company wants to add user control for product category so that users can select a category and can see the trend month-wise and product-wise accordingly.

Field	Description
Order ID	Unique Order ID of a product
Order Date	Order Placement Date
Ship Date	Shipment Date of the placed order
Aging	Used to Create Histogram Bin
Ship Mode	Shipment mode of placed order
Product Category	Product Category
Product	Name of the Product
Sales	Sales Amount
Quantity	The amount or number of a material
Discount	A deduction from the usual cost of something

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Shipping Cost   The amount required to ship the placed order

Order Priority   Precedence of placed order

Customer Id   Unique Customer ID

Customer Name   Name of the Customer

City   Unique City Name

State   Unique State Name

Country   Unique Country Name

Region   Especially the part of a country

Analysis Tasks:
Use the saved Sample E-Commerce database.
Prepare a table of Sales and Profit month-wise in one sheet, named it as 'Working Sheet'.

A Pivot Table is created using Sales Data and by dragging appropriate data into the necessary columns.

Months	Sum of Sales	Sum of Profit
Jan	676313	313566,3467
Feb	610240	286102,6233
Mar	686681	317186,0067
Apr	659404	308364,5133
May	672547	313751,2467
Jun	664560	307585,0233
Jul	685152	318703,2
Aug	670788	310442,8433
Sep	658844	305334,4567
Oct	689116	320748,67
Nov	656663	304716,1
Dec	693073	323401,92
Grand Total	**8023381**	**3729902,95**

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\# Prepare the sales table region-wise in the working sheet.

A Pivot Table is created using Sales Data and by dragging appropriate data into the necessary columns.

Row Labels	Sum of Sales
Africa	713074
Canada	60003
Caribbean	260495
Central	1735900
Central Asia	321005
East	446468
EMEA	788072
North	750482
North Asia	369816
Oceania	544827
South	1034884
Southeast Asia	500923
West	497432
Grand Total	**8023381**

\#   Create a User Control Combo box for Product Category.

List of Product Categories
Auto & Accessories
Electronic
Fashion
Home & Furniture

- A Combo box is created using Developer Add-in.
- Electronic Box Shown above generates values accordingly as 1,2,3,4 respectively In Cell C42 from various categories as shown above.
- Cell C41 is given code to display the selected product from the list of products.
  Code: =offset(L7,C42,0)

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\# Create Column Chart of the month-wise table and region-wise table

- • Select the table monthwise sales and profit and table region wise sales.
- • Click on Insert -> Data -> Chart and click on clustered 2D Chart to get output as below.
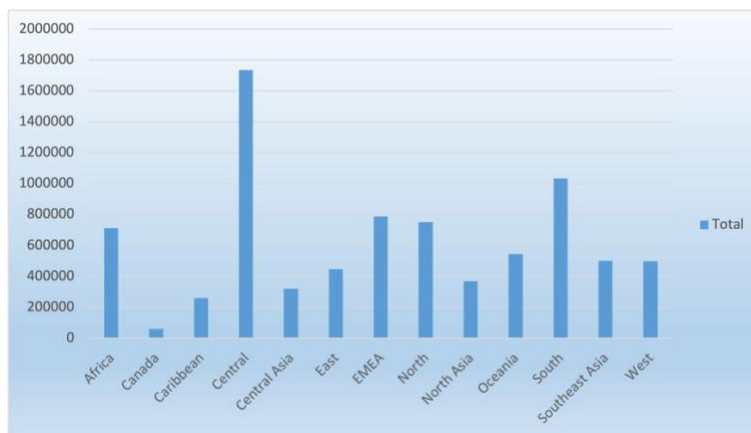
\# Link the table with combo box.

Using SUMIFS function and pulling data from sales table

- • Sales Box Value = SUMIFS('Sales Data'!$H$2:$H$51291,'Sales Data'!$F$2:$F$51291,Workingsheet!$C$41)
- • Quantity Box Value =SUMIFS('Sales Data'!$I$2:$I$51291,'Sales Data'!$F2:$F51291,Workingsheet!$C$41)
- • Profit Box Value = SUMIFS('Sales Data'!$K2:$K51291,'Sales Data'!$F$2:$F$51291,Workingsheet!$C$41)

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\#   Create a dashboard.
•   Created separate pivot tables to link them with the charts to appear as per requirements.
•   Separate table is created as a subset table for the pivot table using INDEX and VLOOKUP codes.

Created As shown Below :

Auto & Accecorries

Home & Furniture

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Electronics

Fashion