

Designing a Sales dashboard in Excel

Course-end Project 1

DESCRIPTION

Use Excel to analyze the sales based on various product categories.

Description:

The dataset in file **E-Commerce Dashboard dataset.xlsx** contains sales data for different product categories. The following are the features in the dataset:

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
Profit	A financial advantage or benefit
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
Months	The month of placing the order

The following project tasks are required to be performed in Excel:

- Use the saved Sample E-Commerce database
- Prepare a table of Sales and Profit month-wise in a working sheet
- Prepare the sales table region-wise in the working sheet
- Create User Control Combo box for Product Category
- Create a Column Chart of the month-wise table and region-wise table
- Link the table with a combo box
- Create a dashboard

Tools required: Microsoft Excel, Data Analysis Add-in

Expected Deliverables: 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.

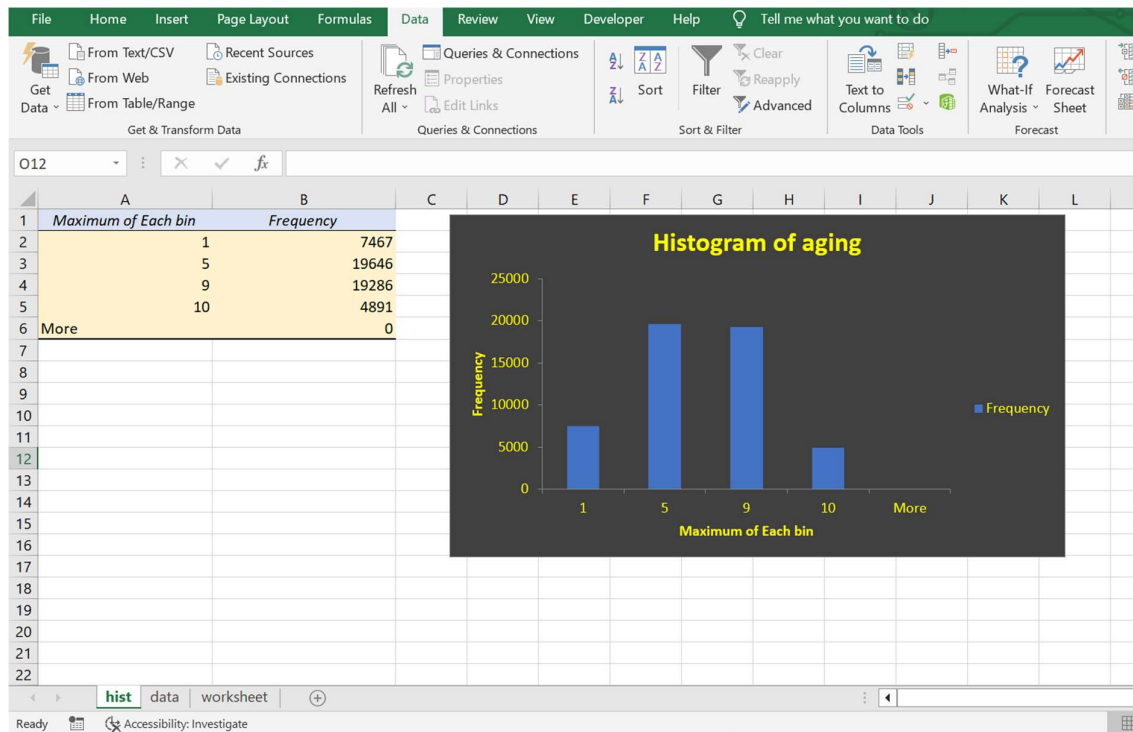
Screenshot of the database as a table: The database was shown as a table by using the shortcut ctrl+T

Order ID	Order Date	Ship Date	Aging	Ship Mode	Product Category	Product	Sales	Quantity	Discount	Profit	Shipping Cost	Order P
AU-2015-1	09-11-2015	17-11-2015	8	First Class	Auto & Accessories	Car Media Players	\$ 140.0	2	0.05	\$ 46.0	\$	4.6 Medium
AU-2015-2	30-06-2015	02-07-2015	2	First Class	Auto & Accessories	Car Speakers	\$ 211.0	3	0.03	\$ 112.0	\$	11.2 Medium
AU-2015-3	05-12-2015	13-12-2015	8	First Class	Auto & Accessories	Car Body Covers	\$ 117.0	5	0.01	\$ 31.2	\$	3.1 Critical
AU-2015-4	09-05-2015	16-05-2015	7	First Class	Auto & Accessories	Car & Bike Care	\$ 118.0	2	0.05	\$ 26.2	\$	2.6 High
AU-2015-5	09-07-2015	18-07-2015	9	First Class	Auto & Accessories	Tyre	\$ 250.0	1	0.04	\$ 160.0	\$	16.0 Critical
AU-2015-6	25-02-2015	05-03-2015	8	First Class	Auto & Accessories	Bike Tyres	\$ 72.0	3	0.04	\$ 24.0	\$	2.4 Critical
AU-2015-7	09-04-2015	10-04-2015	1	First Class	Auto & Accessories	Car Mat	\$ 54.0	1	0.05	\$ 54.0	\$	5.4 High
AU-2015-8	30-03-2015	06-04-2015	7	First Class	Auto & Accessories	Car Seat Covers	\$ 114.0	5	0.02	\$ 22.6	\$	2.3 Critical
AU-2015-9	09-02-2015	16-02-2015	7	First Class	Auto & Accessories	Car Pillow & Neck Rest	\$ 231.0	5	0.03	\$ 116.4	\$	11.6 Critical
AU-2015-10	21-04-2015	01-05-2015	10	First Class	Auto & Accessories	Car Media Players	\$ 140.0	2	0.02	\$ 54.4	\$	5.4 Critical
AU-2015-11	16-11-2015	26-11-2015	10	First Class	Auto & Accessories	Car Speakers	\$ 211.0	4	0.01	\$ 122.6	\$	12.3 Critical
AU-2015-12	01-09-2015	02-09-2015	1	First Class	Auto & Accessories	Car Body Covers	\$ 117.0	4	0.04	\$ 18.3	\$	1.8 High
AU-2015-13	09-07-2015	16-07-2015	7	First Class	Auto & Accessories	Car & Bike Care	\$ 118.0	1	0.02	\$ 35.6	\$	3.6 Critical
AU-2015-14	22-07-2015	27-07-2015	5	First Class	Auto & Accessories	Tyre	\$ 250.0	3	0.04	\$ 140.0	\$	14.0 High
AU-2015-15	12-10-2015	21-10-2015	9	First Class	Auto & Accessories	Bike Tyres	\$ 72.0	4	0.01	\$ 18.0	\$	1.8 Medium
AU-2015-16	23-02-2015	05-03-2015	10	First Class	Auto & Accessories	Car Mat	\$ 54.0	2	0.01	\$ 27.0	\$	2.7 Critical
AU-2015-17	04-05-2015	08-05-2015	4	First Class	Auto & Accessories	Car Seat Covers	\$ 114.0	2	0.05	\$ 22.6	\$	2.3 High
AU-2015-18	12-06-2015	19-06-2015	7	First Class	Auto & Accessories	Car Pillow & Neck Rest	\$ 231.0	5	0.05	\$ 93.3	\$	9.3 High
AU-2015-19	13-05-2015	20-05-2015	7	First Class	Auto & Accessories	Car Media Players	\$ 140.0	2	0.05	\$ 46.0	\$	4.6 Critical
AU-2015-20	27-07-2015	02-08-2015	6	First Class	Auto & Accessories	Car Speakers	\$ 211.0	2	0.02	\$ 122.6	\$	12.3 Critical
AU-2015-21	09-12-2015	13-12-2015	4	First Class	Auto & Accessories	Car Body Covers	\$ 117.0	5	0.01	\$ 31.2	\$	3.1 Critical

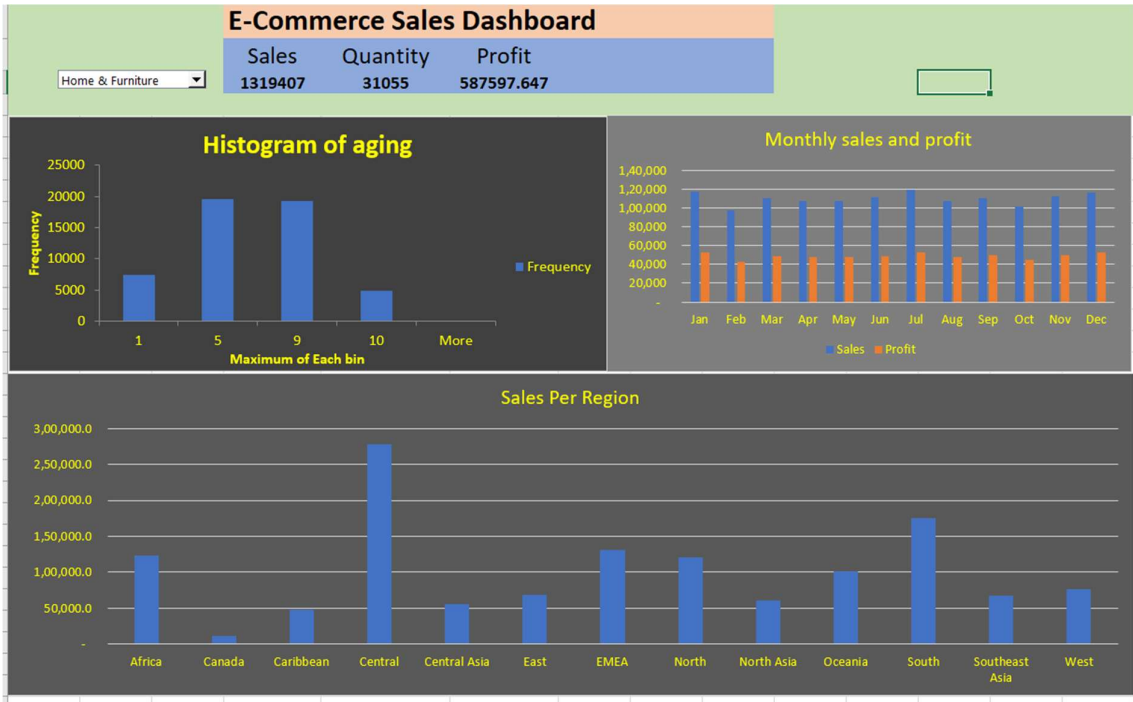
Screenshot of the sales table as per region and months: Here, the formula SUMIF() was used and the sum range was taken for sales as well as profit, while considering months and category as criteria range, the criteria for category was taken using the output from the combobox and using the offset() formula to find relevant category.

Months	Sales	Profit	Regions	Sales	Product category
Jan	31,280	14,090	Africa	37,993.0	Auto & Accessories
Feb	29,776	12,679	Canada	4,602.0	Electronic
Mar	32,800	14,173	Caribbean	12,287.0	Fashion
Apr	33,417	14,603	Central	82,750.0	Home & Furniture
May	33,705	15,610	Central Asia	11,573.0	
Jun	30,219	12,858	East	23,353.0	Electronic
Jul	29,644	13,384	EMEA	42,527.0	
Aug	34,088	14,562	North	36,746.0	
Sep	33,069	14,518	North Asia	16,230.0	
Oct	39,240	17,419	Oceania	30,575.0	
Nov	32,598	15,121	South	47,491.0	
Dec	34,902	15,157	Southeast Asia	21,604.0	
			West	27,007.0	

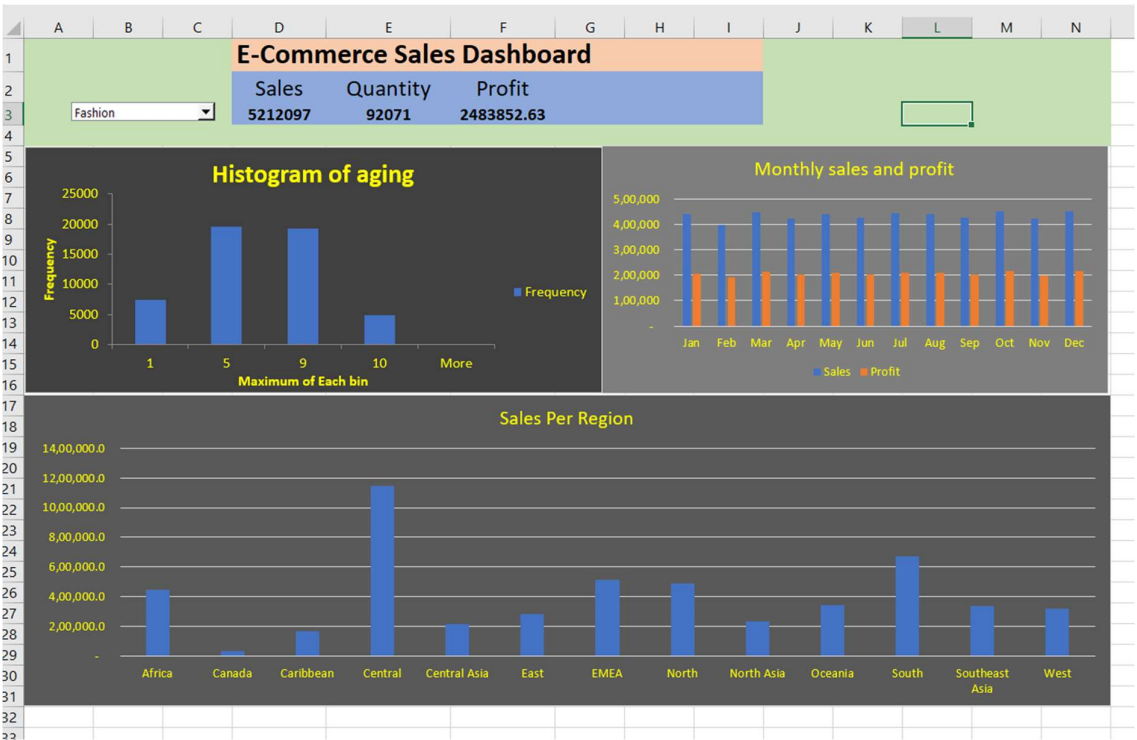
Screenshot of histogram for aging. The histogram was obtained by using the histogram option from the data analysis tab, and using the data range from aging column. There was an issue while using this option as it does not generate a histogram when the data and bins are in different tables.



Screenshot of Dashboard as per 'Home and Furniture' category: The dashboard contains the column charts for sales & profit as per months as well as sales per region for 'Home and Furniture'



Screenshot of Dashboard as per 'Fashion' category: The dashboard contains the column charts for sales & profit as per months as well as sales per region for 'Fashion'



Sales as per region and months using the pivot tables(without category as filter)

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Paste Font Alignment Number Condition Formatting

J11

	A	B	C	D	E	F	G	H	I	J
1										
2										
3	Row Labels	Sum of Sales	Sum of Profit		Row Labels	Sum of Sales				
4	Jan	676313	313566.3467		Africa	713074				
5	Feb	610240	286102.6233		Canada	60003				
6	Mar	686681	317186.0067		Caribbean	260495				
7	Apr	659404	308364.5133		Central	1735900				
8	May	672547	313751.2467		Central Asia	321005				
9	Jun	664560	307585.0233		East	446468				
10	Jul	685152	318703.2		EMEA	788072				
11	Aug	670788	310442.8433		North	750482				
12	Sep	658844	305334.4567		North Asia	369816				
13	Oct	689116	320748.67		Oceania	544827				
14	Nov	656663	304716.1		South	1034884				
15	Dec	693073	323401.92		Southeast Asia	500923				
16	Grand Total	8023381	3729902.95		West	497432				
17					Grand Total	8023381				
18										
19										
20										
21										
22										

Working sales per region and mnths Sales Data Sheet1

Ready Accessibility: Investigate