**K327 Project 2: Commitment Trends Report**

**The Tale…**

The file *Sales Rep Log.xlsm* has 5 years of sales history by model year, starting in Model Year 2009. Model Years 2010 -2013 have identical formats, while 2009 data is simply a dump from a stand-alone file. All have the same field headings relevant to this task.

The Sales Logs themselves are used to collect current sales data from the files. They are segregated in order to track each model year independently. The file normally links to Tractor Status using the serial number as the primary key, but all formulas have been deleted in the file. Relevant information from Tractor Status includes Territory Rep (rep), Dealer which purchased the unit (Sold To), Series and Customer PO #. Weekly input includes the Current Location, whether the unit has a buyer (Committed for, a Y/N field), Data Committed, whether the unit has been delivered (Retailed, another Y/N field) and delivery date (Date Retailed).

Another file draws the data out of the Sales Rep Log to produce several reports (numerous other worksheets in the Log have been deleted to save space for the assignment; placing additional reports in the log would have made it too large). One report is *Commitment Trends by Month*. This shows the total number of COMMITMENTS by month by year and was done with Arrays. The other report is *COMMITMENTS by DEALER by YEAR*. The PDF files provided is a template; the numbers may or may not be the same as your analysis. If different, check your analysis to verify the accuracy of your formulas.

This summary details by month by year by dealer the total sales and is a Pivot Table. An additional file has been provided to help you clean up the dealer names, as various people have waxed poetic with them over the years before they were standardized in Tractor Status with Data Validation.

Create the Commitment Trends file, link the relevant data from the Sales Log and create the reports. The files must dynamically linked so that an update to the Sales Log will be immediately present in Commitment Trends.

Pay attention to the data. Study it well.

**The Assignment…**

Develop a plan to complete this analysis. Detail what need to be done on a high level, what specifically need to be done with the data, and what formulas/functions could be useful in the process. Update the plan as you proceed if there are issues that force you to change the plan. Do this in a Word document. Note: NO credit will be given for a plan that appears to be post-mortem of the analysis. Planning skills are actually MORE critical for your Business career than the Excel skills learned in this class. Include all team members names in the Plan.

A good plan but not implemented well means you have further work to do in understanding the analytical tool. A poor plan but working model may imply that you either don’t need this course or that you were lucky. “Lucky” is not a great career model.

Implement the plan in Excel. Make it as dynamic as possible to minimize the number of formulas and functions you need to write/update. Use Named Ranges and Insert Function as much as possible. Learn to use the software; you already know how to type.

To upload: Place both files in a folder named K327\_Project2\_*yourusername*. Select the folder and zip it: Right click=> Send to=> Compressed (Zipped) folder. Upload to Canvas.