

Excel Sales Dashboard Project – Notes

Project Objective

The objective of this project is to analyze sales data and build an interactive Excel dashboard using Pivot Tables, Pivot Charts, and Slicers. The dashboard helps understand sales performance across time, products, and regions.

Dataset Used

Dataset: Sample Sales Data (Kaggle) File: sales_data_sample.csv Key Columns: ORDERDATE, SALES, PRODUCTLINE, COUNTRY, YEAR_ID, MONTH_ID, PRODUCTCODE, QUANTITYORDERED

Step 1: Data Import

The CSV file is imported into Excel using the Text Import Wizard. Comma is selected as the delimiter to correctly separate columns. The file is immediately saved as an Excel Workbook (.xlsx) to preserve dashboards and pivots.

Step 2: Data Cleaning

- Converted ORDERDATE from text to date format
- Ensured numeric columns (SALES, QUANTITYORDERED, PRICEEACH) are numbers
- Removed blank rows from critical columns
- Removed duplicate records using ORDERNUMBER
- Standardized text fields using TRIM, UPPER/PROPER functions

Step 3: Pivot Tables

- Total Sales by Year
- Sales by Product Line
- Monthly Sales Trend
- Sales by Country
- Top 10 Products by Quantity Sold

Step 4: Charts

- Line Chart – Yearly Sales Trend
- Bar/Column Chart – Sales by Product Line
- Column Chart – Monthly Sales
- Pie Chart – Sales by Country
- Bar Chart – Top 10 Products

Step 5: Slicers

Slicers for Year, Product Line, and Country are added and connected to all Pivot Tables. This allows interactive filtering across the entire dashboard.

Step 6: Dashboard Design

All charts and slicers are placed on a single sheet named 'Sales Dashboard'. The layout includes a title, aligned slicers at the top, and charts arranged neatly for readability.

Key Learning Outcomes

- Hands-on experience with Excel data cleaning
- Strong understanding of Pivot Tables and Pivot Charts
- Ability to build interactive dashboards using slicers
- Understanding limitations of CSV vs Excel workbook format

Interview Summary Line

Built an interactive Excel Sales Dashboard using Pivot Tables, Pivot Charts, and Slicers to analyze sales performance by year, product line, and country.