CTRL SHFT + - To Insert a new column

1. Use PROPER() on Contact Name column

= PROPER(maria anders) 🡺 Maria Anders

1. Use UPPER() on Customer ID column

= UPPER(alfki) 🡺 ALFKI

1. To delete the unwanted column 🡺 Select the cleaned column and copy. Click on the raw column first cell. Click on Paste Values under Home Tab
2. Use CHOOSE() function on ShipVia column in Order Info

1 🡺 Speedy Express

2🡺United Package

3🡺Federal Shipping

1. Use TEXT() function on Order Date to create a new column Order Month

DASHBOARD

1. Click anywhere on table and select “Format As Table “ on top. Rename Table Name (no spaces)
2. Populate values into Customer Name part of Dashboard and add a dropdown

* Go to Data on top, inside Data Tools, click on Data Validation
* Allow – List, Source – place cursor on first company name and ctrl shft down arrow

1. Use VLOOKUP to populate customer contact info. The LOOKUP column always needs to be the first column in the table to work.
2. Use IF statement and Nested VLOOKUP to replace 0 with ‘NA’
3. Use Index & Match function to populate contact info. It overcomes the limitations of VLOOKUP and is more efficient

DASHBOARD – Order History

1. Delete the unwanted columns and copy the data from Order Info to Dashboard page.
2. Select the data and Format AS Table and rename table under design
3. Go to Table Design and Uncheck Filter Button
4. Sync Customer Name with Order History part using ADVANCED FILTER AND VBA

* Rename Ship Name to Customer Name
* Click anywhere on the table, click on data tab, select advanced
* Choose ‘filter-the-list-in-place’
* Criteria Range will include B2 AND B3 – Header and Customer Name dropdown cell from Dropdown option
* View, Macro, Record Macro, perform the steps from selecting customer, stop recording
* Fn+Alt+F11 to open VBA window..click on Module and delete the lines before RANGE.
* Copy the code from RANGE. Click on the Dashboard page
* FROM dropdown, select worksheet and change and copy the codes in between

DASHBOARD – Order DETAILS

1. Use SUBTOTAL function for filtered data since missing rows in filtered data can mess up the results if we use count, avg, max, etc.
2. SUBTOTAL – AVERAGE – 1 AVERAGE(includes hidden values) – 101 AVERAGE(ignores hidden values) 🡪 we use 101 for filtered data

PIVOT TABLE

1. Create Pivot Tables with Order Info. Analyze -> Pivot Chart.
2. Design -> Move Chart Location to Dashboard Page

Tie Chart to Table Data

* In Pivot Field, add Customer Name to Filters
* Open VBA window with fn+Alt+F11
* Go to Modules and clear the page
* Click on Insert -> Procedure -> ProcedureName->Sub-> Public
* Public Sub ProcedureName

‘ Update Chart Data based on selected customer

* Public Sub UpdateCustOrderInfo()
* On Error GoTo noCustomerData
* ' Update Chart data based on selected customer
* ' declare some variables
* Dim pt As PivotTable ' store the order pivottable
* Dim field As PivotField ' store a reference to the pt filter field
* Dim newCus As String ' store the selected customer name
* ' referencing the pivottable
* Set pt = Worksheets("YearlyOrderPT").PivotTables("YearlyOrdersPT")
* ' referencing the field adding the column name under the filter field
* Set field = pt.PivotFields("Customer Name")
* 'referencing the customer
* newCus = Worksheets("Customer Dashboard").Range("B3").Value
* ' apply the filters
* With pt
* field.ClearAllFilters
* field.CurrentPage = newCus
* .RefreshTable
* End With
* pDone:
* Exit Sub
* noCustomerData:
* MsgBox ("Customer Does Not Exist!")
* End Sub

INSERT SLICER

* Pivot Analyze -> Insert Slicer -> Order Month

VBA to hide chart when customer does not have any orders

View -> Record Macro

Hit clear filter button on the slicer

To hidechart & filter -> Home ->Find &Select -> Selection Pane -> Click on Order Month and Chart 1 once