Business Analytics with Excel Certification Training

Designing a Sales Dashboard in Excel

Excel Workbook Link:

https://drive.google.com/drive/folders/1xXdQk_-zJYQrbMgT2JYebbXtwYpIjnwQ

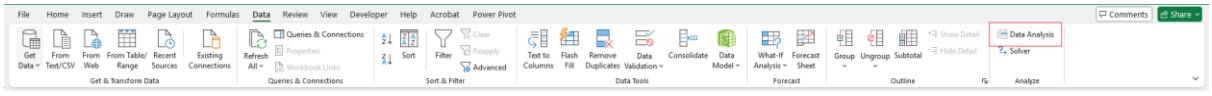
Steps to be followed:

1. Open the dataset input file E-Commerce Dashboard dataset.xlsx
2. Prepare a table of sales and profit month-wise in the working sheet
3. Prepare the sales table region-wise in the working sheet
4. Create user control combo box for product category
5. Create a column chart of the month-wise table and region-wise table
6. Link the table with a combo box
7. Create a dashboard

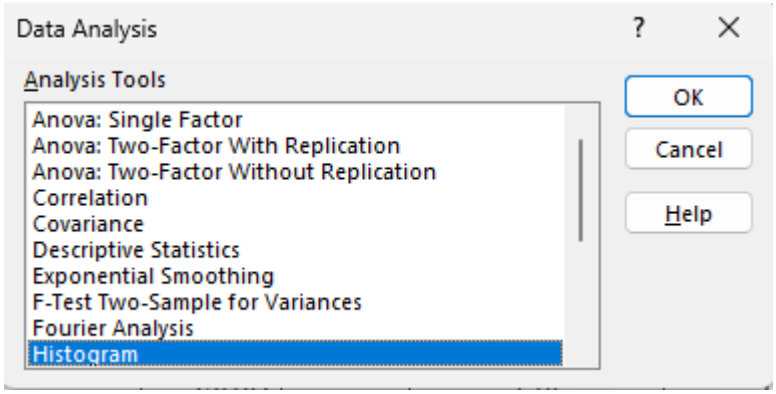
Steps to create a dashboard in Excel

Step 1: Create histogram for shipping days (Aging)

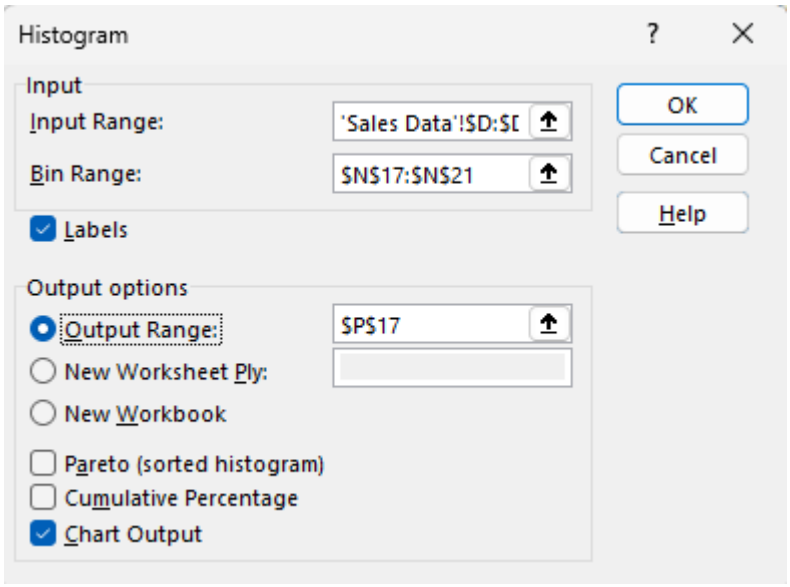
- To create a histogram, click the **Data tab**, and then click on **Data Analysis** under Analyze Group.

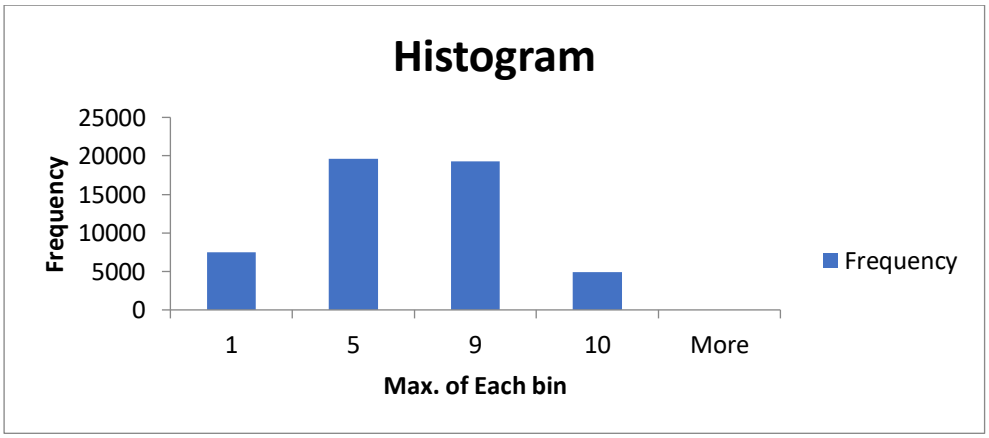


- Now, select **Histogram** and click **OK**. A histogram dialog box will appear.

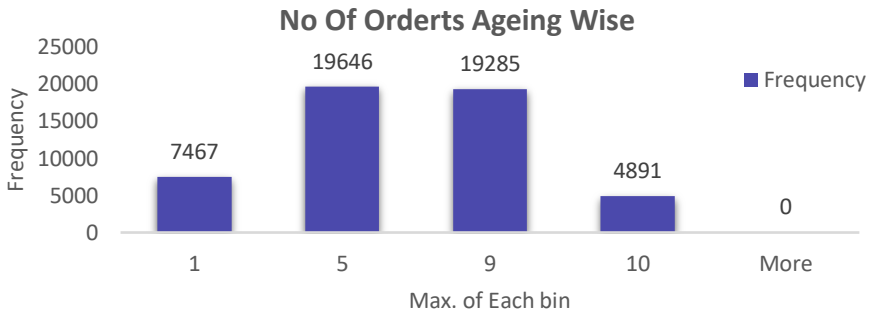


- In the histogram dialog box, click the **Labels** check box.
- After that, select the range ("**Sales Data!$D:$D**") in the Input Range box and ("**$N$17: $N$21**") in the Bin Range box
- In the **Output Range** section, select range "**$P$17**" for the binning table, click the **Chart Output** check box, and then **OK**.



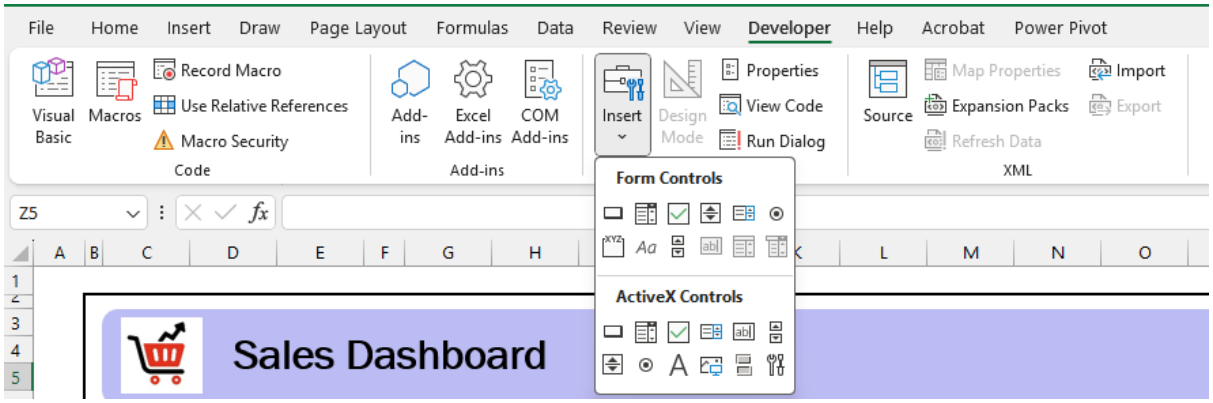


- Visualization can be changed under Format Axis.

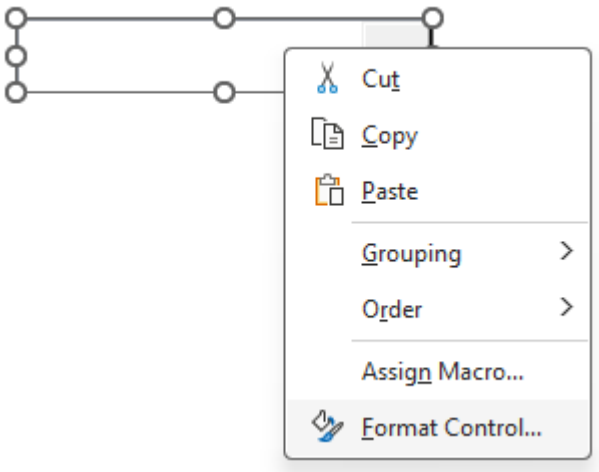


Step 2: Create a combo box:

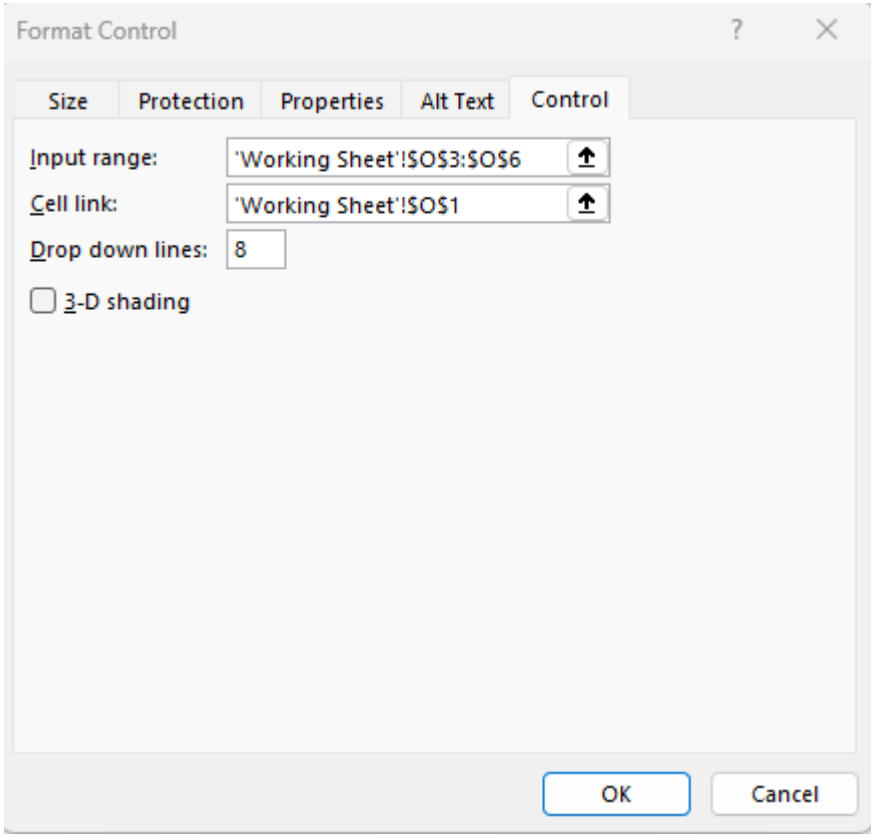
- Insert combo box for product category list in the dashboard sheet.
- Click on the **Developer tab** and click on **Insert**, then select **Combo box** and draw a box anywhere on the dashboard sheet.



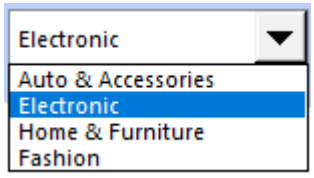
- Pass the input range and cell link for the combo box.
- Right-click the country list combo box, and Click on **Format Control**.



- Pass Input range "**Working!$Q$3:$Q$6**" and Cell link "**Working Sheet!$O$1**" from the working sheet

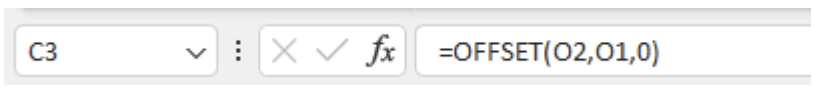


- The following options are displayed when the combo box is selected.



Now, write the offset function in cell "**C3**" to fetch the product category based on the selection in the product category Combo box.

- Write the equal sign and then the function name
- Pass the first argument as Cell "O2"
- In the second argument, select the cell "O1".
- In the third argument, type zero and close the parenthesis.

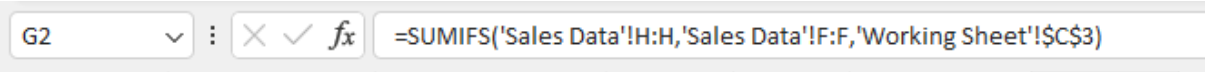


Step 3: Write SUMIFS formula to calculate the total sales, quantity, and profit

Now, write the SUMIFS formula to calculate sales, quantity, and profit in the dashboard sheet.

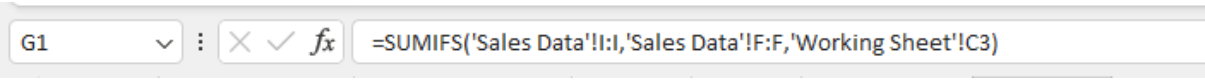
Enter the formula in cell **G2**:

- Enter the equal sign, and then enter the function name and open parenthesis
- Pass the first argument Sum Range. Select range "**Sales Data'!H:H**", and then enter a comma
- Now, pass the second argument Product Category column "criteria Range1" as "**Sales Data'!F:F**", and then enter a comma
- Pass the third argument "criteria1" as "**Working Sheet'!$C$3**".



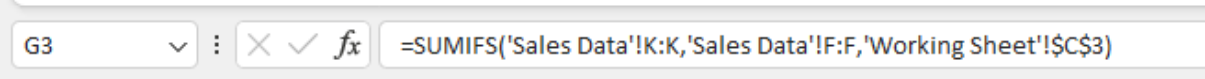
Perform the same function to calculate the quantity in cell G7

- In **G1**, write the equal sign, and then enter the function name and open parenthesis
- The first argument is Sum_Range. Select range "**Sales Data'!I:I**", and then enter a comma
- Pass the second argument Product Category column "criteria Range1" as "**Sales Data'!F:F**", and then enter a comma
- Pass the third argument "criteria1" as "**Working Sheet'!C3**".



For-Profit

- In **G3**, write the equal sign and then enter the function name and open parenthesis
- The first argument is Sum_Range. Select range "**Sales Data'!K:K**", and then enter a comma
- Pass the second argument Product Category column "criteria Range1" as "**Sales Data'!F:F**", and then enter a comma
- Now, pass the third argument "criteria1" as "**Working Sheet'!$C$3**".



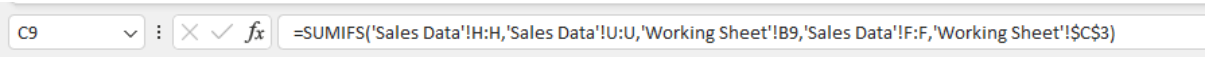
Step 4: SUMIFS formula to calculate sales and profit month-wise

Now write the SUMIFS formula to calculate the sales and profit month-wise and sales region-wise.

Enter the formula in cell **C9**:

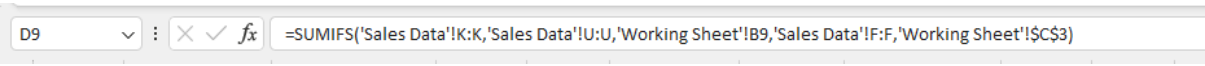
- Enter the equal sign, and then enter the function name and open parenthesis
- The first argument is Sum_Range. Select range "**Sales Data'!H:H**", and then enter a comma

- Pass the second argument month column “criteria Range1” as “**Sales Data'!U:U**”, and then enter a comma.
- Now, pass the third argument “criteria1” as “**Working Sheet'!B9**,” and then enter a comma
- Pass the fourth argument as “**Sales Data'!F:F**” product category column, and then enter a comma.
- Pass the fifth argument as “**Working Sheet'!$C$3**”
- Now, copy and paste the formula in Range **C9:C20.**



Enter the formula in cell **D9**:

- Enter equal sign, then enter function name and open parenthesis
- The first argument is Sum_Range. Select range “**Sales Data’!K:K**”, and then enter a comma
- Now, pass the second argument month column “criteria Range1” as “**Sales Data’!U:U**”, and then enter a comma
- Pass the third argument “criteria1” as “**Working Sheet'!B9**” and then enter a comma
- Pass the fourth argument as “**Sales Data'!F:F”** product category column, and then enter a comma
- Enter the fifth argument as “**Working Sheet'!$C$3**”
- Now, copy and paste the formula in Range **D9:D20.**

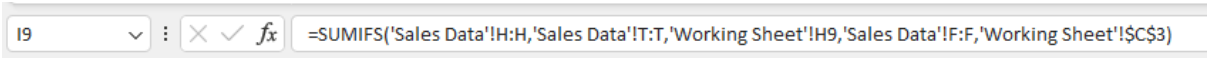


Month	Sales	Profit
Jan	31,280	14,090
Feb	29,776	12,679
Mar	32,800	14,173
Apr	33,417	14,603
May	33,705	15,610
Jun	30,219	12,858
Jul	29,644	13,384
Aug	34,088	14,562
Sep	33,069	14,518
Oct	39,240	17,419
Nov	32,598	15,121
Dec	34,902	15,157

Step 5: SUMIFS formula to calculate sales region wise

- Write the equal sign, and then enter the function name and open parenthesis
- The first argument is Sum_Range. Select range “**Sales Data’!H:H**”, and then enter a comma
- Pass the second argument region column “criteria Range1” as “**Sales Data’!T:T**”, and then enter a comma

- Now, pass the third argument “criteria1” as “**Working Sheet'!H9**” and then enter a comma
- Pass, the fourth argument as “**Sales Data'!F:F**” product category column, and then enter a comma
- Pass the fifth argument as “**Working Sheet'!$C$3**”
- Now, copy and paste the formula in Range **I9:I21.**

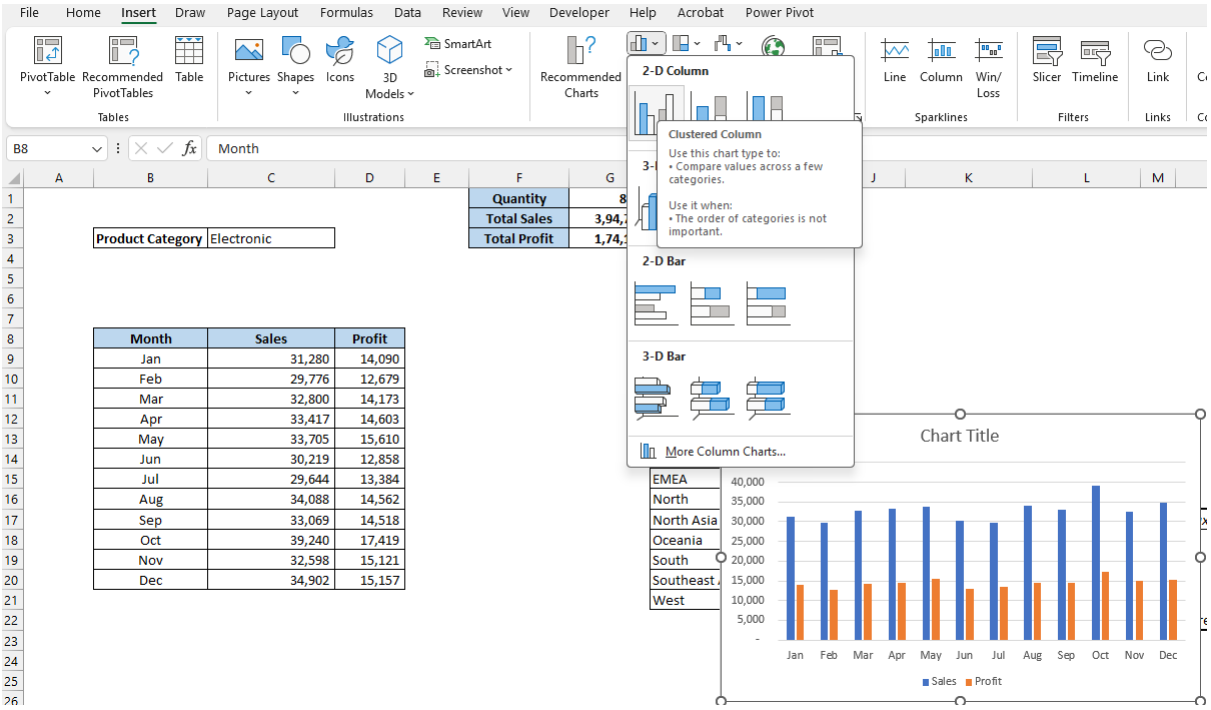


Region	Sales
Africa	37,993
Canada	4,602
Caribbean	12,287
Central	82,750
Central Asia	11,573
East	23,353
EMEA	42,527
North	36,746
North Asia	16,230
Oceania	30,575
South	47,491
Southeast Asia	21,604
West	27,007

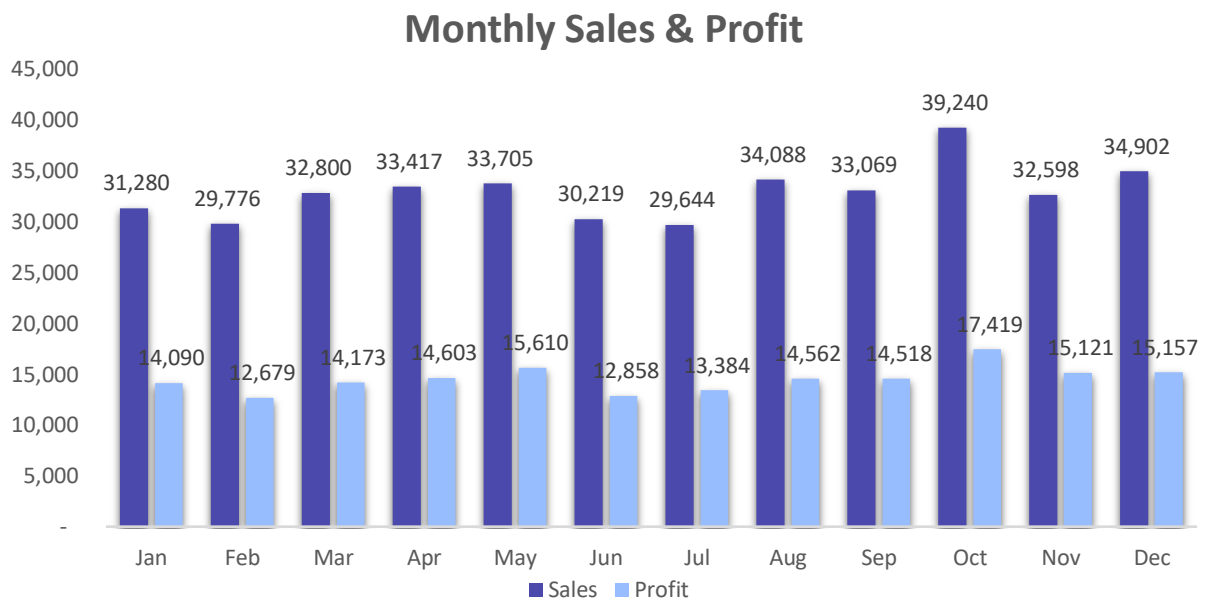
Step 6: Create column chart

Now, create the column chart for both region-wise and month-wise tables

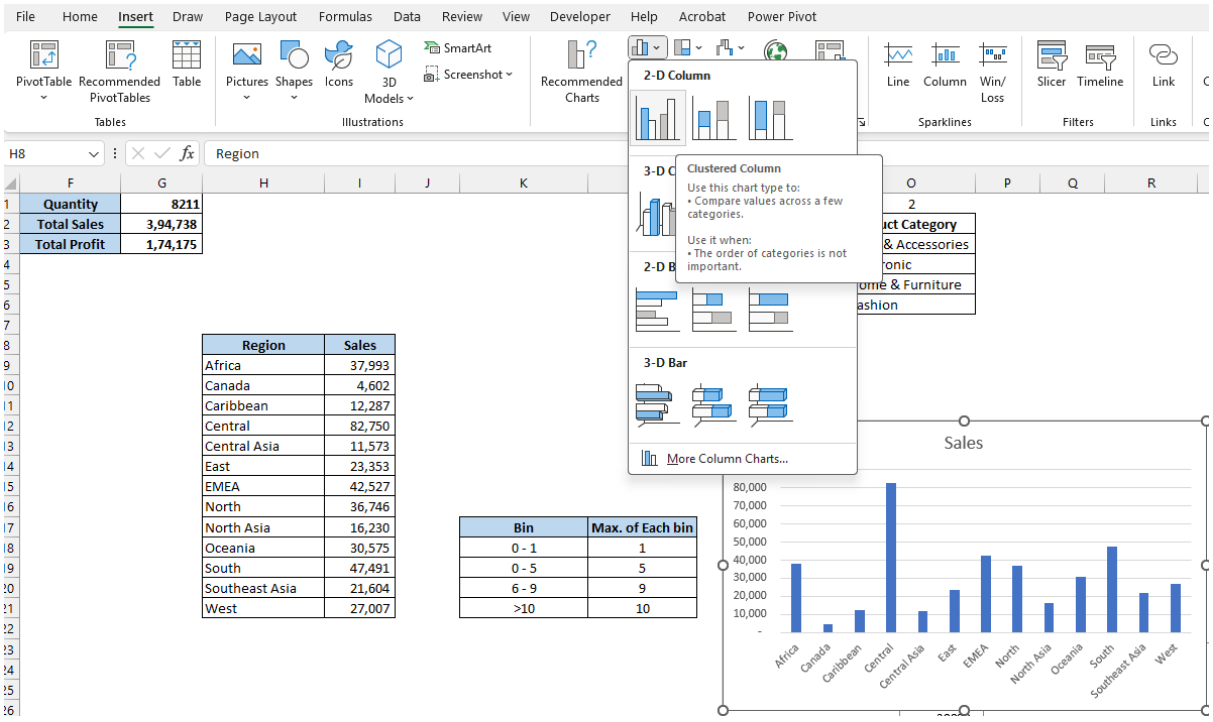
- Select table (**B8:D20**), and click the insert tab, then select Insert column chart under the Charts Panel

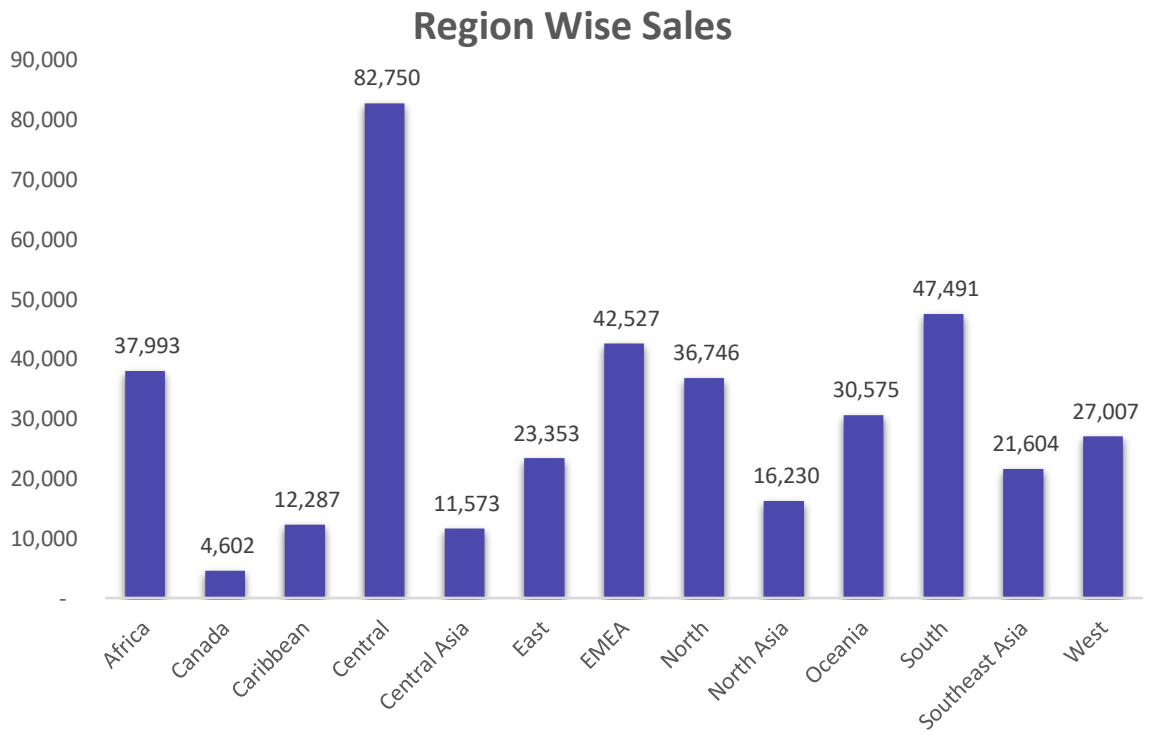


- Cut and paste the chart in the dashboard sheet

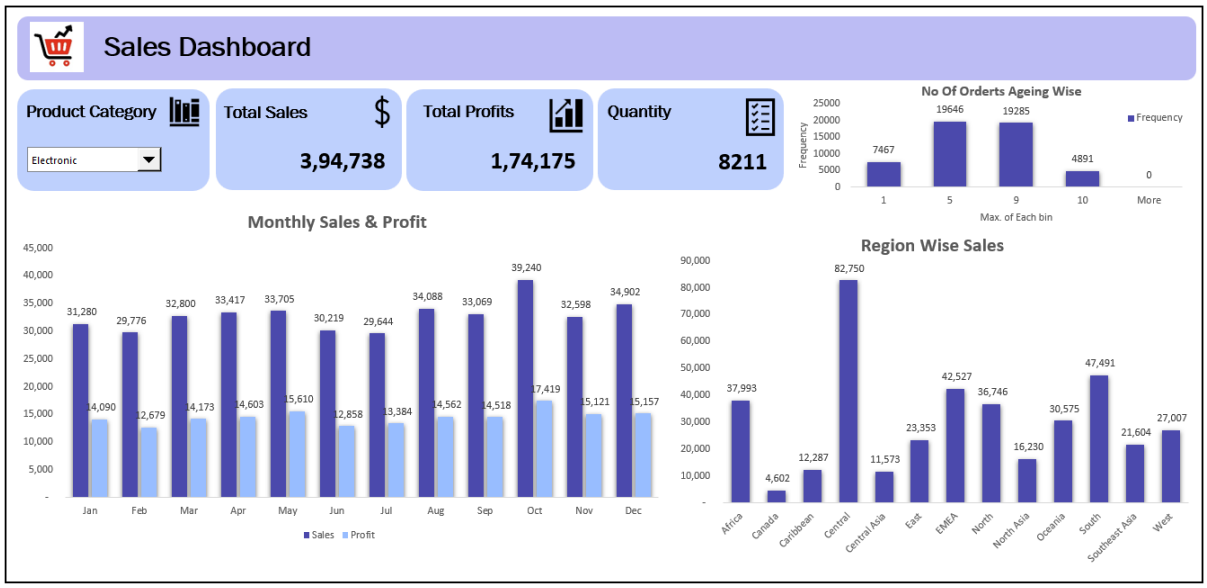


- Perform the same steps for other tables to create more charts for the dashboard


File Home Insert Draw Page Layout Formulas Data Review View Developer Help Acrobat Power Pivot
PivotTable Recommended PivotTables Table
Pictures Shapes Icons 3D Models SmartArt Screenshot
Recommended Charts
Line Column Win/ Loss
Slicer Timeline
Link
Tables
Illustrations
Sparklines
Filters
Links
H8
Region
2-D Column
Clustered Column
Use this chart type to:
• Compare values across a few categories.
Use it when:
• The order of categories is not important.
3-D Bar
More Column Charts...
Quantity 8211
Total Sales 3,94,738
Total Profit 1,74,175
Region Sales
Africa 37,993
Canada 4,602
Caribbean 12,287
Central 82,750
Central Asia 11,573
East 23,353
EMEA 42,527
North 36,746
North Asia 16,230
Oceania 30,575
South 47,491
Southeast Asia 21,604
West 27,007
Bin Max. of Each bin
0 - 1 1
0 - 5 5
6 - 9 9
>10 10
Sales
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
-
Africa Canada Caribbean Central Central Asia East EMEA North North Asia Oceania South Southeast Asia West


Region Wise Sales
90,000
80,000
70,000
60,000
50,000
40,000
30,000
20,000
10,000
-
37,993
4,602
12,287
82,750
11,573
23,353
42,527
36,746
16,230
30,575
47,491
21,604
27,007
Africa Canada Caribbean Central Central Asia East EMEA North North Asia Oceania South Southeast Asia West

This is the sales dashboard. We can apply any colour to the interior of the cells and the data series to format the data.



Note: Customized the dashboard with the inbuild icons and custom colours.