Sales Dart Services

Shelly Cashman Excel 2019 | Module 3: SAM Project 1b



CREATE A SALES REPORT

# GETTING STARTED

* Open the file **SC\_EX19\_3b\_*FirstLastName*\_1.xlsx**, available for download from the SAM website.
* Save the file as **SC\_EX19\_3b\_*FirstLastName*\_2.xlsx** by changing the “1” to a “2”.

If you do not see the **.xlsx** file extension in the Save As dialog box, do not type it. The program will add the file extension for you automatically.

* With the file **SC\_EX19\_3b\_*FirstLastName*\_2.xlsx** still open, ensure that your first and last name is displayed in cell B6 of the Documentation sheet.

If cell B6 does not display your name, delete the file and download a new copy from the SAM website.

* PROJECT STEPS

1. Amir Nader is a sales analyst for Sales Dart Services, a sales and marketing services company in Chicago, Illinois, that works with businesses in the consumer goods industry. Amir has been creating a report that analyzes sales and commissions in an Excel workbook, and has asked you to help him complete the report.   
     
   Go to the *Report* worksheet. Rename the *Report* worksheet to as **Sales Report**, which is a more accurate name.
2. Unfreeze the panes to scroll the worksheet without keeping the top and left panes displayed.
3. **Middle Align** the contents of the merged cell A2 to improve the appearance of the "Sales Report" subtitle.
4. In cell K2, insert a formula that uses the **NOW** function to display today's date.
5. Fill the range C5:G9 with the formatting from the range B5:B9 to use a consistent number format for the sales data.
6. Amir wants to show the sales trend for each service category and month from July to December. Provide this information as follows:
   1. In cell H5, insert a **Line** sparkline based on the data in the range **B5:G5**.
   2. Use the Fill Handle to fill the range H6:H9 without formatting based on the contents of cell H5.
   3. Change the color of the sparklines in the range H5:H9 to **Brown, Accent 5** (9th column, 1st row of the Theme Colors palette) to emphasize them.
   4. Show a **High Point** and a **Low Point** in the sparklines to make those values easy to identify.
7. Copy the formula in cell I5 and paste it in the range I6:I9, pasting only the formula and number formatting, to include sales totals.
8. Amir wants to determine how the sales of each month contributed to the total sales. Calculate this information for him as follows:
   1. In cell B12, insert a formula without using a function that divides the total sales for July (cell **B9**) by the total sales (cell **I9**).
   2. Use an absolute reference to cell I9 in the formula.
   3. Use the Fill Handle to fill the range C12:G12 with the formula in cell B12.
9. Amir also needs to calculate the commissions paid each month. If the company earns $275,000 or more in a month, the commission is 26% of the sales. If the company earns less than $275,000 in a month, the commission is 17% of the sales. Calculate the commissions as follows:
   1. In cell B16, enter a formula that uses the **IF** function and tests whether the total sales for July (cell **B9**) is greater than or equal to **275000**.
   2. If the condition is true, multiply the total sales for July (cell **B9**) by **0.26** to calculate a commission of 26%.
   3. If the condition is false, multiple the total sales for July (cell **B9**) by **0.17** to calculate a commission of 17%.
   4. Use the Fill Handle to fill the range C16:G16 with the formula in cell B16 to calculate the commissions for August through December.
10. Change the sparklines in the range H16:H17 as follows to use a format similar to the Monthly Sales sparklines:
    1. Change the Column sparklines to **Line** sparklines.
    2. Apply the sparkline style **Dark Red, Sparkline Style Accent 1, Darker 50%** (1st row, 1st column of the Sparkline Color theme palette) to make the sparklines easier to see.
11. Amir would like to increase the average number of clients served per month. Because retail merchandising has the lowest sales, Amir wants to know how many retail merchandising clients he needs to reach the goal of 35 clients served per month.   
      
    Use Goal Seek to set the average number of clients for all services (cell **I26**) to the value of **35** by changing the average number of retail merchandising clients (cell **I23**).
12. Format the text in cell J21 to clarify what it refers to as follows:
    1. Merge and center the range J21:J26.
    2. Rotate the text down in the merged cell.
    3. Change the width of column J to **7.00**.
13. Delete row 32 to keep the Estimated Commissions information together.
14. Amir also wants to compare the estimated sales of January and June of next year. Insert a chart that provides this information as follows:
    1. Create a Clustered Column chart based on the nonadjacent ranges A21:B25 and G21:G25.
    2. Enter **Estimated Sales: Jan and June** as the chart title.
    3. Resize and reposition the chart so that its upper-left corner is in cell A33 and its lower-right corner is in cell E45.
    4. Change the chart layout to **Layout 5** to display a data table with the chart.

Your workbook should look like the Final Figures on the following pages. Save your changes, close the workbook, and then exit Excel. Follow the directions on the SAM website to submit your completed project.

* Final Figure 1: Sales Report Worksheet

