

Summary Report:

Excel Dashboard Project for Umbrella Solutions

Project Overview:

The Excel dashboard project focused on creating an interactive and visually appealing dashboard for the fictional company, Umbrella Solutions. The company is involved in various services including Usage fees, Subscription, Renting, Licensing, Asset sale, and Advertising. The main objective of the project was to analyze sales data and target areas, while also incorporating marketing strategies for both B2B and B2C segments.

Dashboard Structure:

The dashboard was divided into three main parts to provide comprehensive insights:

Income Source:

This section focused on key income metrics, including income target, target achieved, operating profit, and monthly average income by year and month. It also provided a breakdown of income by different locations. The marketing strategy for both B2B and B2C segments was integrated into this section.

Geospatial Analysis:

This section visualized total sales by countries using a map, highlighting the achieved and expected targets by different countries. The geographical representation provided a clear understanding of the sales distribution and performance across various locations.

Sales Workflow:

This section provided a count and analysis of order-related information, including Order Number, Year, Month, POS (Point of Sale), Payment Method, Assembly Stage, Registration Status, Sale Status, Delivery Type, Amount, and Target. Various chart types such as line charts, scattered charts, bar charts, pie charts, doughnut charts, map charts, tree map charts, and radar charts were utilized to visualize the sales workflow data.

Dynamic and Interactive Features:

The Excel dashboard was designed to be dynamic and interactive. It would automatically update with new data as it was added to the dataset. Additionally, all the pages of the dashboard were linked together through buttons, allowing seamless navigation and exploration of the different sections.

Conclusion:

The Excel dashboard project for Umbrella Solutions successfully achieved the objective of analysing sales data and target areas. The visualisations and interactive features provided valuable insights into income sources, geographical sales distribution, and the sales workflow process. The dashboard's user-friendly design and dynamic nature make it a valuable tool for monitoring and decision-making within the company.