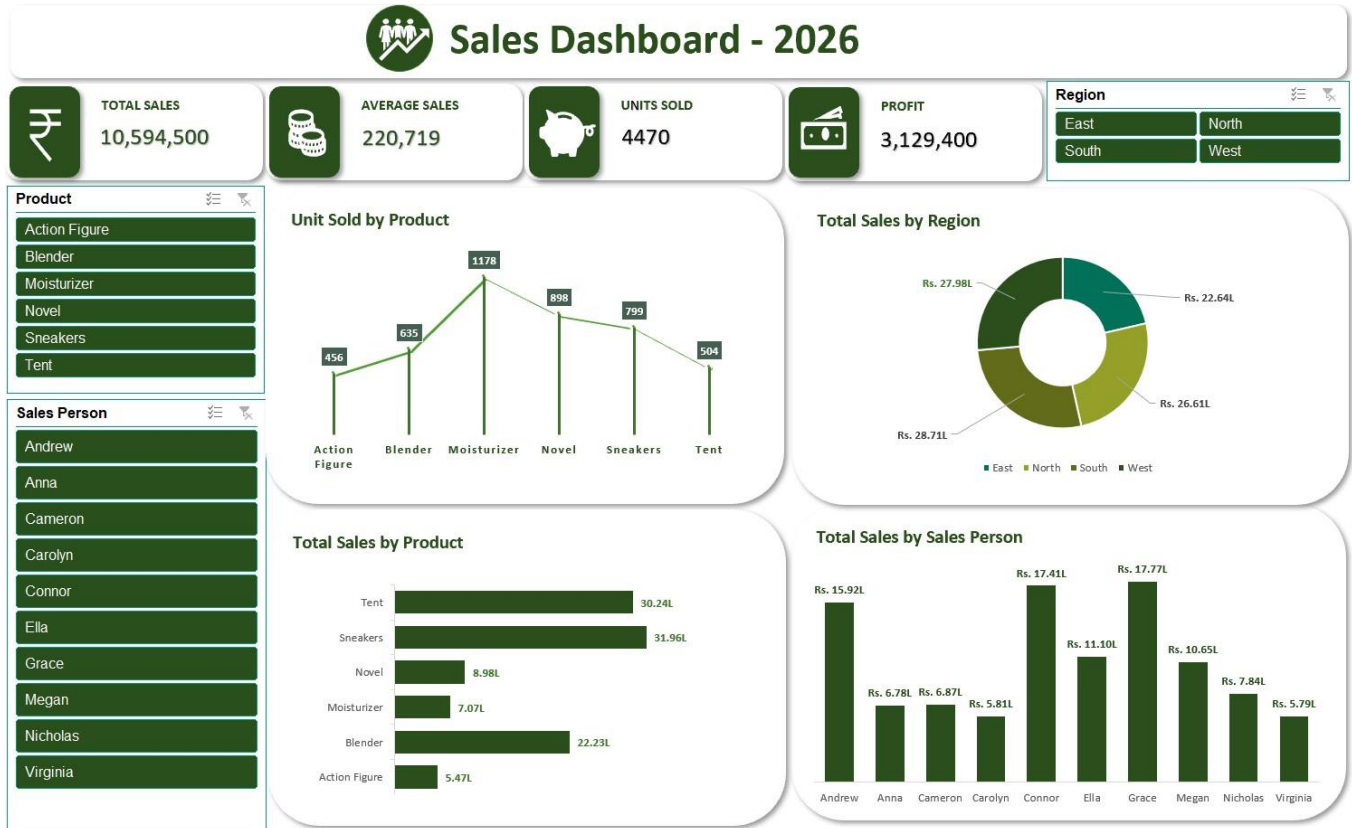


SALES DASHBOARD – 2026

Project Documentation (with Pictures)

Author: Vignesh S

Purpose: Visualize overall sales performance by Product, Region, and Salesperson using an interactive Excel dashboard with KPIs, charts, and slicers.



Overview with numbered sections (1–7)

Key Metrics

Metric	Value	Meaning
Total Sales	Rs. 10,594,500	Total revenue generated across all sales.
Average Sales	Rs. 220,719	Average revenue per order/transaction.
Units Sold	4470	Total quantity of products sold.
Profit	Rs. 3,129,400	Revenue minus total costs/expenses.

Step 1: Prepare the Source Data (Excel)

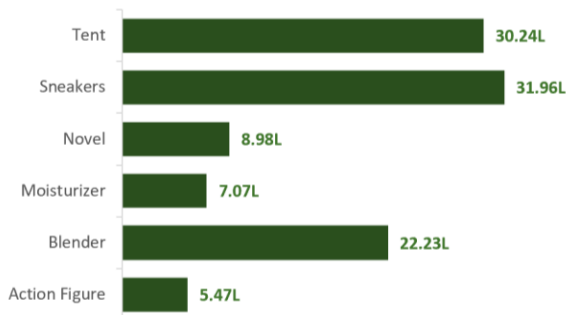
Create a single sheet with the following columns. Ensure consistent data types and remove blanks/duplicates.

- 1 Format numbers (Amount as currency, Units as number).
- 2 Add a calculated column if needed (e.g., $Amount = Units \times Unit Price$).
- 3 Convert data range to an Excel Table (Ctrl+T) and name it **SalesData**.

Step 2: Build Pivot Tables

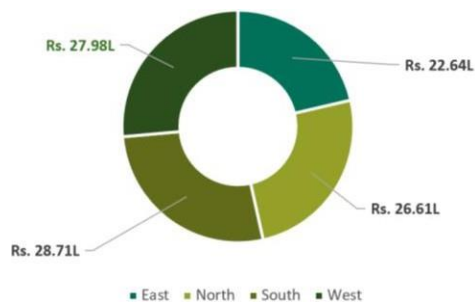
- 1 Insert → PivotTable → select **SalesData**.
- 2 Create separate PivotTables for: (a) Sales by Product, (b) Sales by Region, (c) Sales by Salesperson, (d) Units by Product.

2a. Total Sales by Product



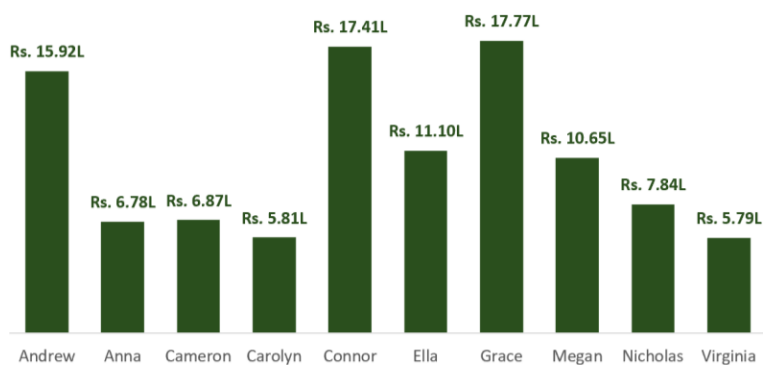
Rows → Product
Values → Total Sales
Chart → Horizontal Bar

2b. Total Sales by Region



Rows → Region
Values → Sum of Sales
Chart → Donut

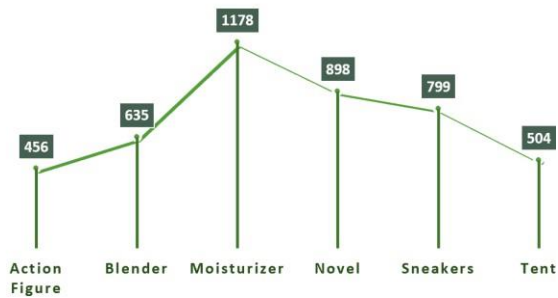
2c. Total Sales by Salesperson



Rows → Sales Person
Values → Total Sales
Chart → Clustered Colum

2d. Units Sold by Product (Line)

Unit Sold by Product



Rows → Product
Values → Sum of Units Sold
Chart → Line with markers

Step 3: KPI Cards (Tiles)



- 1 Use formulas on top of **SalesData** or Pivot values.
- 2 **Total Sales:** =SUM(SalesData[Total Sales])
- 3 **Average Sales:** =AVERAGE(SalesData[Total Sales])
- 4 **Units Sold:** =SUM(SalesData[Units Sold])
- 5 **Profit:** SUM(SalesData[Profit])

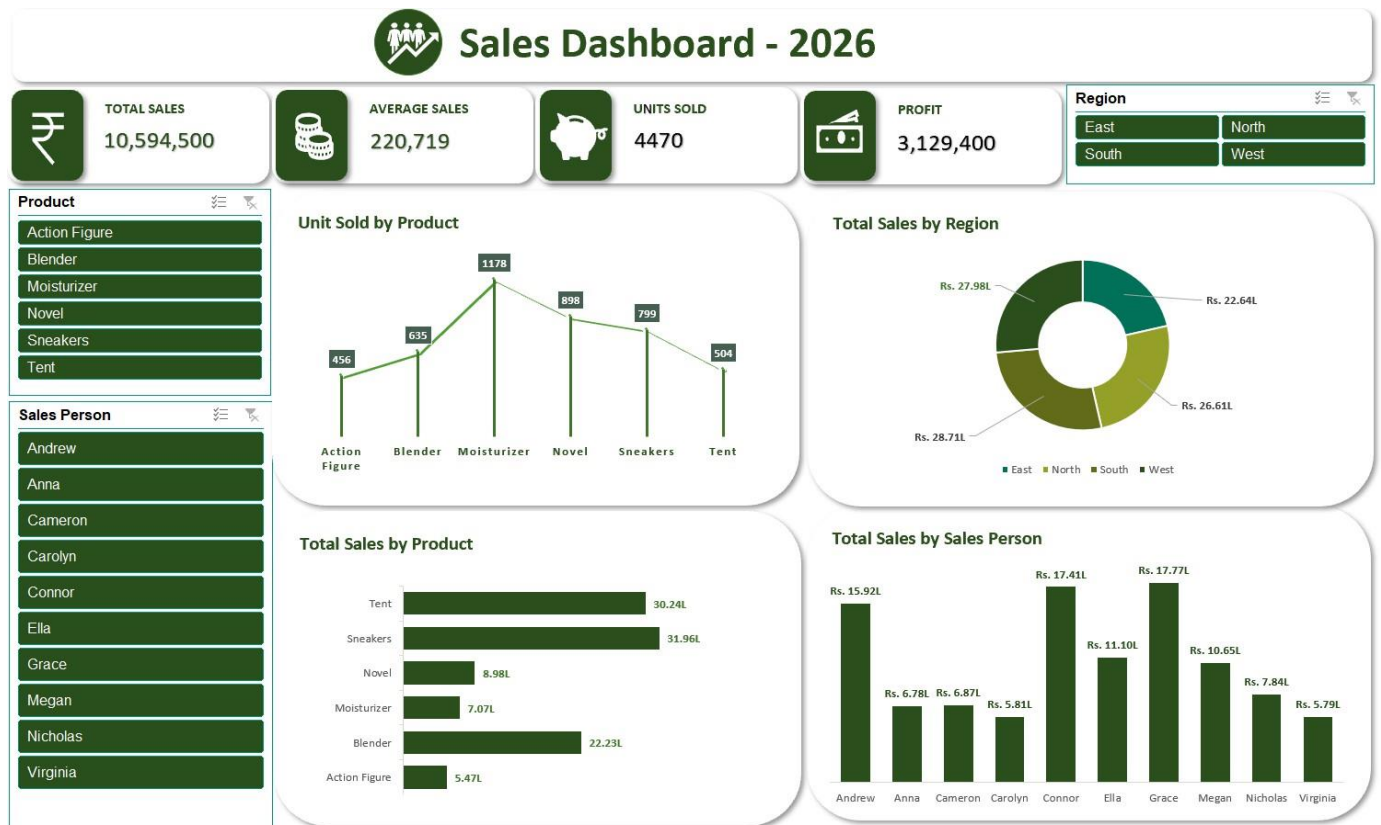
Step 4: Filters / Slicers

- 1 Insert → Slicer → choose fields (Product, Region, Salesperson).
- 2 Right click slicer → *Report Connections* → tick all related PivotTables.
- 3 Format slicers (Columns, Style) for a clean layout.

Step 5: Layout & Design

Arrange all charts, tables, and cards on a single sheet named "Dashboard".

Align to a grid, add shapes/icons, and match fonts. Use consistent number formats (e.g., Indian currency) and short labels for readability.



Step 6: Export & Share

- 1 File → Export → Create PDF/XPS (or Save As → PDF).
- 2 Select *Options...* → Active sheet(s) to export only the Dashboard.
- 3 Send the PDF to stakeholders. Keep the Excel workbook for live, filterable data.

Glossary / Definitions

Total Sales: Sum of Amount for all transactions.

Average Sales: Average of Amount across transactions.

Units Sold: Sum of quantity sold across products.

Profit: Total Sales minus total Cost.

Pivot Table: Excel feature that summarizes data by fields.

Slicer: Visual filter control that connects to one or more PivotTables.