

Lesson 10 – Exercise 10.2: Using Custom Dates

Business Scenario

A sales manager has to submit a monthly sales report to her director. She needs to show the monthly trend in sales across various products. With the help of this analysis, the manager and her director want to reform their sales strategy for the next year. Create a highlight table with category, sales, and a custom order date showing data at the month level. Then, answer the following questions:

- In August 2014, which category recorded the highest sales?
- Which month in 2015 has the highest accumulated profit ratio across all product categories?

(**Hint:** Add Profit Ratio to the text table columns and Apply filter on Date).

Overview

- Create a custom date on Order Date at Month/Year level.
- Create a Highlight table with Order Date (Month/Year), Category, and Sales.
- Add Profit Ratio to the tooltip.
- Sort months by profit ratio in descending order.

The result should resemble the image below:

Columns: Category
Rows: Order Date (Month / ..)

Filters: (Empty)

Marks: SUM(Sales)

Sales by Month and Category

Order Date (Mo...)	Furniture	Office Supplies	Technology
January 2013	\$6,243	\$4,851	\$3,143
February 2013	\$1,840	\$1,072	\$1,609
March 2013	\$14,574	\$8,606	\$32,511
April 2013	\$7,945	\$11,155	\$9,195
May 2013	\$6,913	\$7,136	\$9,600
June 2013	\$13,206	\$12,953	\$8,436
July 2013	\$10,821	\$15,121	\$8,004
August 2013	\$7,320	\$11,379	\$9,210
September 2013	\$23,816	\$27,423	\$30,538
October 2013	\$12,304	\$7,211	\$11,938
November 2013	\$21,565	\$26,862	\$30,201
December 2013	\$30,646	\$18,006	\$20,893
January 2014	\$11,740	\$1,809	\$4,625
February 2014	\$3,134	\$5,368	\$3,449
March 2014	\$12,500	\$15,883	\$10,344
April 2014	\$10,476	\$12,559	\$11,161
May 2014	\$9,375	\$9,114	\$11,643
June 2014	\$7,714	\$10,648	\$6,435
July 2014	\$13,674	\$4,720	\$10,371
August 2014	\$9,639	\$11,735	\$15,525
September 2014	\$26,273	\$19,306	\$19,017

Detailed Instructions

1. In the workbook from Exercise 10.1, click on New worksheet icon
2. To create a Custom Date, right click on **Order Date** dimension, and from the Create menu, select Custom Date
3. In the Create Custom Data [Order Date] window, choose Detail as **Month/Year**
4. Click **OK**. This creates a new dimension: **Order Date (Month / Year)**
5. Create a highlight text table with **Order Date (Month/Year)** in Rows, **Product Category** in Columns, and **Sales** in text (**HINT:** You might have to use Swap Rows and Columns option from toolbar)
6. Add **Profit Ratio** to the Tooltip shelf
7. Rename the worksheet as **Sales by Month and Category**
8. Save the workbook as **Lesson 10 Exercises**
9. Close the workbook

Answers

Based on the view, these are the answers to the questions in the problem statement:

- In August 2014, which category recorded the highest sales?
Answer – **Technology**

- Which month in 2015 has the highest accumulated profit ratio across all product categories? (**Hint:** Add Profit Ratio to the text table columns and Apply filter on Date)

Answer – **October**