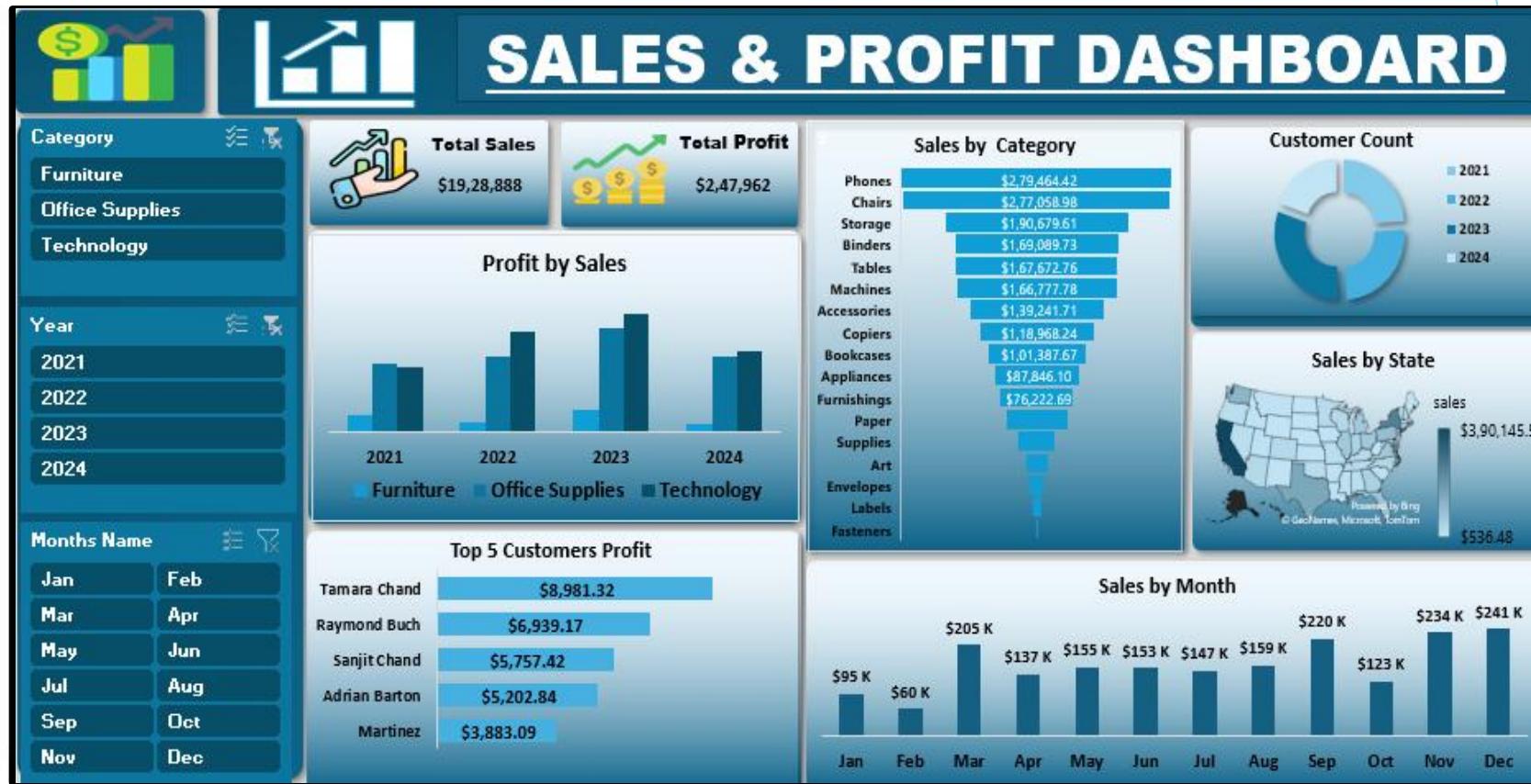


# Sales & Profit Dashboard Using Microsoft Excel



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# OBJECTIVES

## 1. Monitor Overall Sales & Profit Performance

Provide a quick and accurate snapshot of total sales and total profit across selected time periods to support data-driven business decisions.

## 2. Analyze Sales and Profit Trends Over Time

Track year-wise and month-wise performance to identify growth patterns, seasonal trends, and fluctuations in sales and profitability.

## 3. Evaluate Product Category Performance

Break down sales and profit by category (Furniture, Office Supplies, Technology) to understand which product groups drive revenue and which need improvement.

## 4. Identify Top-Performing Customers

Highlight the highest-profit customers to help the business focus on key relationships and develop targeted retention strategies.

## 5. Understand Regional Sales Distribution

Visualize sales by state/region to uncover strong and weak markets, enabling better resource allocation and regional strategies.

## 6. Provide Interactive Filtering for Deep Analysis

Allow users to slice data by Category, Year, and Month to conduct detailed and customized analysis based on business needs.

# DATA PROCESSING

## 1. Data Collection

Import raw sales data from Excel, CSV, or database sources.

Typical fields include:

Order Date, Customer Name, State, Category, Sub-Category, Product Name, Sales, Quantity, Profit, Year, Month.

## 2. Data Cleaning

- Remove duplicates

Delete repeated rows to avoid distorted totals.

- Handle missing values

Fill or remove rows where Sales/Profit values are missing.

- Correct data types

Convert Order Date to Date type, numeric fields to float/int.

- Fix inconsistent text

Ensure category, state, and customer names follow a standard format.

## 3. Data Transformation

- Create new columns

- Year extracted from Order Date

- Month Name for month-wise visualizations

- Profit Margin = Profit / Sales

## 4. Data Filtering

Prepare slicers/filters for:

- Category
- Year
- Month

These help users interact with the dashboard easily.

## 5. Data Integration

- Combine multiple tables (if any) using VLOOKUP, XLOOKUP, or Power Query merges.
- Ensure relationships between tables are correctly defined (in Power BI or Excel Data Model).

## 6. Data Validation

- Verify totals match the original source files.
- Check for negative or unrealistic profit values.
- Confirm that grouped results (e.g., Top 5 customers) are accurate.

## 7. Data Visualization Preparation

Convert processed data into a visualization-ready structure:

- Pivot Tables
- Measures (DAX if Power BI)
- Aggregated tables for charts
- KPI cards data (Total Sales, Total Profit)

## 8. Dashboard Assembly

Use the cleaned & summarized data to build:

- Monthly Sales Chart
- Profit by Sales Chart
- Category-wise Sales Bar Chart
- Customer Count Donut Chart
- State Map Chart
- Top 5 Customers Profit
- KPI Cards (Sales + Profit)

## 9. Final Quality Check

- Check alignment, colors, labels, and slicer functionality.
- Validate formulas and pivot refresh behavior.
- Confirm dashboard updates automatically when data changes.

# PLOATING PIVOT AND CHARTS



Profit by Sales (Clustered column chart)

Shows yearly comparison of sales and profit across categories to identify growth and category performance.



Sales by Category (funnel chart)

Highlights which product categories contribute the most revenue, helping identify top-selling items.

## Customer Count



Customer Count (Donut Chart)

Displays the number of customers each year,  
showing growth or decline in customer base.



#### Sales by State (Map Chart)

Provides a geographical view of sales distribution, helping identify strong and weak regions.

## Top 5 Customers Profit



### Top 5 Customers Profit (horizontal Bar chart)

Ranks customers by the profit they generate, helping target high-value clients.



#### Sales by Month (Column chart)

Shows monthly performance trends and helps identify peak and low sales periods.

# FILTER USE BY SLIDER



Category Slicer (Furniture, Office Supplies, Technology)

Helps filter all charts based on product categories to analyze specific segments.  
Useful for comparing sales and profit across different product groups.

Year	
2021	 
2022	
2023	
2024	

#### Year Slicer (2021, 2022, 2023, 2024)

Allows switching the dashboard view by year for quick trend comparison.  
Helps track business growth and performance across multiple years.

Months Name	
Jan	Feb
Mar	Apr
May	Jun
Jul	Aug
Sep	Oct
Nov	Dec

### Months Name Slicer (Jan-Dec)

Filters data by month to study seasonal sales and profit patterns.  
Useful for identifying peak months and low-performance periods.

# CARDS CREATION



## Total Sales Card

Shows the overall revenue generated for the selected period.

Helps quickly understand business performance at a glance.



## Total Profit Card

Displays the total profit earned after deducting costs.

Useful for evaluating financial health and profitability instantly.

# CONCLUSION

The Sales & Profit Dashboard provides a comprehensive view of business performance by combining key metrics, visual trends, and customer insights in one place. With interactive charts, slicers, and KPI cards, it allows decision-makers to quickly identify growth opportunities, monitor profitability, and make informed strategic decisions.

# RECOMMENDATIONS

## 1. Focus on High-Profit Customers

Prioritize engagement and retention strategies for top customers contributing the most profit.

## 2. Improve Low-Performing Categories

Investigate categories with low sales or negative profit and optimize pricing, marketing, or inventory.

## 3. Expand in High-Sales Regions

Allocate more resources to states with strong sales performance to maximize growth opportunities.

## 4. Monitor Monthly Trends Closely

Use monthly sales patterns to plan promotions, manage stock, and prepare for seasonal demand.

## 5. Enhance Data Refresh & Automation

Implement automated updates to ensure the dashboard always reflects the latest business data.

Thank  
You

