Step 1: Data collection stage

i). On the orders table we are going to add the following columns

* Customer Name
* Email
* Country
* Coffee Type
* Roast Type
* Size
* Unit Price
* Sales

ii). We utilize XLOOKUP function to collect data from the customers sheet for the columns Customer Name, Email, and Country

iii). Under Customer Name, the formula,

* =DXLOOKUP(C2,customers!$A$1:$A$1001,customers!$B$1:$B$1001,,0)

iv). Under Email column, the data source has some empty rows. The formula

* =DXLOOKUP(C2,customers!$A$1:$A$1001, customers!$C$1:$C$1001,,0) gives a couple of zeros due to a lack of corresponding values. To eliminate this, IF statements come in handy.
* =IF(DXLOOKUP(C2,customers!$A$1:$A$1001,customers!$C$1:$C$1001,,0)=0,"",DXLOOKUP(C2,customers!$A$1:$A$1001, customers!$C$1:$C$1001,,0))

v). Under the column Country we apply the formula

* =DXLOOKUP(C2,customers!$A$2:$A$1001, customers!$G$2:$G$1001,,0)

vi). Next, we source information from the products table. Utilizing index match since it will be dynamic.

* =INDEX(products!$A$1:$G$49,MATCH(orders!$D2,products!$A$1:$A$49,0),MATCH(orders!I$1,products!$A$1:$G$1,0))

vii). The sales values are derived from the unit price \* quantity.

Step 2: Data Wrangling and Formatting

i). Add column Coffee Type name to reflect the full name of the coffee types utilizing the formula

* =IF(I2="Rob","Robusta",IF(I2="Exc","Excelsa", IF(I2="Ara", "Arabica",IF(I2="Lib","Liberica",""))))

Rob reflects to Robusta, Exc to Excelsa, Ara to Arabica and Lib to Liberica.

ii). Add column Roast type Name to reflect the full name of the roast type.

M refers to Medium

L refers to Light

D refers to Dark

* =IF(J2="M","Medium",IF(J2="L", "Light",IF(J2="D","Dark","")))

iii). Format Order date column to reflect the date format dd-mmm-yyyy

iv). Add the metric in the Size column while keeping a one decimal place. In this scenario the metric is “Kg”

v) Format the columns Unit Price and Sales into USD currency.

vi) Check for duplicates in the data.

Step 3: Convert the range into a table.

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Step 4: Pivot Tables and Charts

The dashboard output.

