Coffee Excel Notes

1. Exploration
   1. What data do we have?
      1. Orders (1000 rows)
         1. primary key = order id
         2. secondary key – customer id
         3. third key – product id
      2. Customers (1000 rows)
         1. Primary key = customer id
      3. Products (48 rows)
         1. Primary key = product id
2. Bad data?
   1. Orders
   2. Customers
      1. Emails – some missing (not necessary)
      2. Phone numbers – some missing (not necessary to fix)
      3. Postcode – not all are 5 digits (if we do location based, we can try to fix)
   3. Products

What information do we need to make charts

1. Combine some information to make, pivot tables easier to assemble
2. Typically in sql this would be a “join” method, most likely a left depending on the primary key table being the first one

Xloopup – how to find customer name

* Look up customer name given, the customer ID match (customer tab)
  + =Xloopup(Customer ID cell, Customer\_ID range,
    - =XLOOKUP(C2,customers!$A$1:$A$1001,customers!$B$1:$B$1001,,0)0 = exact match
  + Cltr+home = top right
  + Cltr+end = bottom right
  + Function+f4 = make the cells absolute
* Email (customer tab)
  + Xloopup
  + With missing data you cannot do cltr+down to get all the data
    - Alternative is to do “cltr + shift + end” will grab all data to the bottom and to the right
    - Use shift+left to remove the right arrows
    - =XLOOKUP(C2,customers!$A$1:$A$1001,customers!$C$1:$C$1001,,0)
      * Notice that if not found, leave blank
      * The default, is to leave blank?
* A screenshot of a computer

  Description automatically generated
* Fix the zeros with a IF statement
* =IF(XLOOKUP(C2,customers!$A$1:$A$1001,customers!$C$1:$C$1001,,0)=0,"",XLOOKUP(C2,customers!$A$1:$A$1001,customers!$C$1:$C$1001,,0))

Country – use xloopup (customer tab)

* =XLOOKUP(C2,customers!$A$1:$A$1001,customers!$G$1:$G$1001,,0)

Grab information from the products tab

* Xlookup
  + =XLOOKUP(D2,products!$A$1:$A$49,products!$C$1:$C$49,,0)
  + =XLOOKUP(orders!D2,products!$A$1:$A$49,products!$D$1:$D$49,,0)
  + =XLOOKUP(D2,products!$A$1:$A$49,products!$E$1:$E$49,,0)
* Index – dynamic
  + We will be doing this for coffee type, roast type, size, unit prices, and sales
  + =INDEX(products!$A$1:$G$49,MATCH(orders!$D2,products!$A$1:$A$49,0),MATCH(orders!I$1,products!$A$1:$G$1,0))
    - Index = INDEX gets a value at a given location in a range of cells based on numeric position.
    - Index checks essentially all the row/columns in the products tab
      * Then it matches the “product ID in the orders tab” to the “product id” in the products tab
        + MATCH(orders!$D2,products!$A$1:$A$49,0),

orders!$D2 - Product id in orders tab

products!$A$1:$A$49,0 – product id range

* + - * MATCH(orders!I$1,products!$A$1:$G$1,0)
        + Match the column headers to each other

Here we have

orders!I$1

Coffee type, roast type, size, unit price

* + - * + products!$A$1:$A$49

all of the column headers in “products” tab

* + note here that we locked in our ranges a little differently, mainly so that we can dynamically drag to the right from “coffee type” in the “orders tab”
    - orders!$D2
      * here we lock in the position of the column, but we allow the number “2” to be able to move down to “x” row number
      * locked in column D
    - orders!I$1
      * here we locked in the first row and not the column, so we can drag to the right

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Sales price = unit price x quantity sold

Rob = robusta

Ara = arabica

Exc = excelsa

Lib = liberica

Converting the coffee type to the extended name with nested IF statements

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

Converting Roast Type to real names

M = Medium

L = Light

D = Dark

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

Formatting

Order Date

* European data format
  + Date – month – year
* American date format
  + Month – date – year

Cltr+1 = shortcut to bring up format cell

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Make the date look more readable

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Size – does not have the units, hard to read

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A table with numbers and a price

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* Change the unit price and sales tab to currency

Check for duplicates

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Cltr+t = shortcut to add table design

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Rename table into Orders

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Table design helps refresh data if anything is changed

Pivot table

* Alt + N + V + T = shortchut to do pivot table
* Insert Tab – Click on Pivot table – click on table to create

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Right click on 2019 or any of them, go to group, and then unselect unwanted categories

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Format the numbers to have no decimal

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A screenshot of a graph

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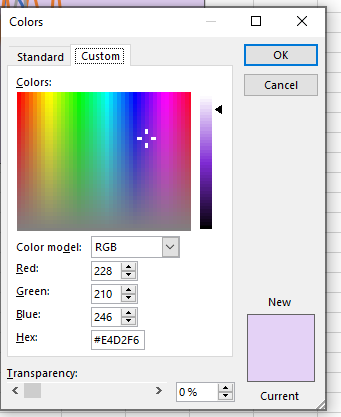
A graph of a graph with blue and orange lines

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Change background color

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Change font colors in the chart

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You can format the color and how the chart looks like

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Add slicer

Loyalty card

=XLOOKUP([@[Customer ID]],customers!$A$1:$A$1001,customers!I1:$I1001,,0)