

Sales Intelligence Report

Excel Interactive Dashboard Documentation

1. Introduction

This report presents a complete Sales Intelligence Report developed entirely in Microsoft Excel. The project converts raw sales data into a structured, interactive dashboard to reveal insights on sales performance, profitability, returns, category analytics, and regional contributions.

2. Tools & Techniques Used

Data Preparation & Modelling:

- Power Query (ETL) for data import, cleaning, and transformation.
- Power Pivot for Data Modelling and relationship mapping.
- Data Model Optimization for efficient analytics.

KPI & Measure Calculation:

- Custom measures: Total Sales, Total Profit, Order Count, Return Rate.

Visualization & Interaction:

- Pivot Tables & Pivot Charts for visual insights.
- KPI Cards for high-level metrics.
- Custom Slicers (Region, Category, Month, Ship Mode).
- Consistent Purple–Lavender theme for clean UI.

3. Dashboard Components & Insights

1. Monthly Sales Trend – Line chart for monthly patterns.
2. Sales vs Profit Analysis – Combo chart comparing revenue & profit.
3. Category Wise Profit – Column chart for category profit contribution.
4. Return Impact Analysis – Area + line chart showing order count and return rate.

5. Regional Performance – Doughnut chart for geographic insights.

4. Key Performance Indicators (KPIs)

- Total Sales
- Total Profit
- Order Count
- Return Rate

5. Interactivity & User Experience

The dashboard supports real-time filtering through slicers, maintains a consistent layout, integrates a unified color palette, and updates visuals dynamically based on user selections.

6. Conclusion

This Sales Intelligence Report demonstrates how Excel can function as a complete BI tool using Power Query, Power Pivot, data modelling, custom measures, and interactive visual design. It effectively transforms raw data into meaningful business insights suitable for decision-making and portfolio presentation.