

Excel Dashboard – Guide

Step 1: Understand the Dataset

The dataset includes:

- Month (Jan–Dec 2024)
- Region (North, South, East, West)
- Product Category (Electronics, Furniture, Clothing, Grocery)
- Total Sales
- Profit %
- New Customers

Objective: Build a dashboard to analyze sales, profit %, and customer growth across time, regions, and categories.

Step 2: Insert Pivot Tables

Insert a new sheet and name it **Pivot_Tables**.

Go to **Insert** → **PivotTable** → Select *SalesData* as the source.

Create multiple PivotTables:

- **Pivot 1: Sales by Month**
 - Rows: Month
 - Values: Sum of Total Sales
- **Pivot 2: Sales by Region**
 - Rows: Region
 - Values: Sum of Total Sales
- **Pivot 3: Profit % by Product Category**
 - Rows: Product Category
 - Values: Average of Profit %
- **Pivot 4: New Customers by Region**
 - Rows: Region
 - Values: Sum of New Customers

Apply **Number Formatting**:

- Sales → Currency with no decimals.
- Profit % → Percentage with 1 decimal.
- Customers → Number with 0 decimals.

Step 3: Create Charts

Use PivotTables to generate charts:

- Sales Trend → Line Chart (Month vs Sales)
 - Sales by Region → Column Chart (Region vs Sales)
 - Profit % by Product Category → Bar Chart (Category vs Profit %)
 - New Customers by Region → Pie Chart (Region vs Customers)
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Step 4: Add KPIs (Key Performance Indicators)

Add summary metrics at the top:

- Total Sales → =SUM(Sales)
- Average Profit % → =AVERAGE(Profit %)
- Total New Customers → =SUM(New Customers)

Format KPIs using bold fonts, larger size, and colors to highlight performance.

Step 5: Add Slicers

1. Select a PivotTable and go to **Insert** → **Slicer**.

2. Insert slicers for:

- Region
- Product Category
- Month

3. Connect slicers to all PivotTables using **Report Connections**.

Step 6: Design the Dashboard

- Place KPIs at the top of the sheet.
- Arrange charts in a structured grid layout.
- Apply consistent formatting, fonts, and colors.
- Keep enough white space to avoid clutter.
- Add a clear title: *“Sales Performance Dashboard – 2024”*.