

Sales Dashboard Project – Excel

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1. Project Overview

This project focuses on building an interactive Sales Dashboard using Microsoft Excel to analyze sales performance, profit, discounts, regions, products, payment modes, and delivery status.

2. Tools & Technologies Used

- Microsoft Excel
 - Power Query
 - Pivot Tables & Pivot Charts
 - Slicers & Interactive Controls

3. Dataset Understanding

The dataset contains customer, product, sales, pricing, discount, payment, delivery, and profit-related fields.

4. Dashboard Planning

Columns were categorized based on dashboard relevance. Unused fields were excluded and KPI fields were identified.

5. Data Preparation & Pivot Analysis

Multiple pivot tables were created to summarize sales, profit, quantity sold, discounts, and delivery status across regions, products, and time.

The screenshot shows a detailed view of a pivot table in WPS Office. The table structure is as follows:

Customer ID	Region	City	Sales Channel	Product Category	Product Sub-Category	Product Name	Product ID	Quantity Sold	Unit Price	Total Sales	Discount %	Discount Amount	Net Sales	Payment Mode	Delivery Date
CUST6023	West	Pune	Online	Home Decor	Curtain	Curtain Model-840	PROD2084	6	680.05	4080.3	20%	816.06	3264.24	COD	D
CUST6030	North	Lucknow	Offline	Clothing	Jeans	Jeans Model-743	PROD9030	5	460.97	2304.85	20%	460.97	1843.88	COD	C
CUST9556	East	Kolkata	Online	Home Decor	Lamp	Lamp Model-843	PROD1012	9	933.57	8402.13	10%	840.21	7561.92	Card	R
CUST6265	Central	Nagpur	Offline	Home Decor	Sofa	Sofa Model-873	PROD1458	7	152.28	1065.96	0%	0	1065.96	UPI	Ir
CUST8647	North	Chandigarh	Offline	Electronics	Laptop	Laptop Model-755	PROD2196	2	169.74	339.48	10%	33.95	305.53	Card	R
CUST4388	Central	Raipur	Online	Clothing	Shirt	Shirt Model-948	PROD6382	4	206.17	824.68	20%	164.94	659.74	UPI	Ir
CUST2887	West	Ahmedabad	Offline	Clothing	Shirt	Shirt Model-936	PROD2519	1	636.34	636.34	10%	63.63	572.71	Wallet	C
CUST9100	South	Chennai	Online	Beauty	Face Cream	Face Cream Model-726	PROD7106	10	833.97	8339.7	0%	0	8339.7	UPI	R
CUST2535	Central	Bhopal	Online	Home Decor	Lamp	Lamp Model-724	PROD3724	1	800.76	800.76	20%	160.15	640.61	COD	Ir
CUST4930	South	Bangalore	Online	Clothing	Jacket	Jacket Model-619	PROD5874	6	251.86	1511.16	5%	75.56	1435.6	COD	D
CUST4875	South	Bangalore	Offline	Electronics	Tablet	Tablet Model-671	PROD1066	6	783.62	4701.72	0%	0	4701.72	COD	R
CUST2661	West	Ahmedabad	Online	Electronics	Laptop	Laptop Model-635	PROD5242	4	183.12	732.48	10%	73.25	659.23	Card	D
CUST9844	North	Delhi	Online	Clothing	Jeans	Jeans Model-400	PROD6400	2	635.07	1270.14	5%	63.51	1206.63	Wallet	Ir
CUST8280	West	Pune	Online	Home Decor	Sofa	Sofa Model-430	PROD1639	8	267.35	2138.8	20%	427.76	1711.04	Card	C
CUST5993	West	Ahmedabad	Online	Beauty	Lipstick	Lipstick Model-344	PROD5226	2	306.97	613.94	5%	30.7	583.24	Wallet	R
CUST8616	North	Chandigarh	Offline	Home Decor	Curtain	Curtain Model-233	PROD2258	3	906.48	2719.44	20%	543.89	2175.55	Wallet	C
CUST9104	East	Kolkata	Online	Home Decor	Lamp	Lamp Model-280	PROD6618	4	958.42	3833.68	5%	191.68	3642	COD	C
CUST5190	South	Chennai	Online	Beauty	Face Cream	Face Cream Model-141	PROD9216	8	723.33	5786.64	10%	578.66	5207.98	Card	C
CUST1686	South	Hyderabad	Online	Electronics	Tablet	Tablet Model-545	PROD6155	2	797.82	1595.64	10%	159.56	1436.08	COD	D
CUST2462	West	Pune	Offline	Beauty	Lipstick	Lipstick Model-618	PROD9881	10	733.79	7337.9	5%	366.89	6971.01	Card	D
CUST7872	West	Pune	Online	Beauty	Face Cream	Face Cream Model-792	PROD5111	8	657.14	5257.12	5%	262.86	4994.26	Wallet	D
CUST1012	South	Chennai	Online	Home Decor	Lamp	Lamp Model-446	PROD8213	2	193.87	387.74	5%	19.39	368.35	COD	D
CUST8565	Central	Nagpur	Offline	Beauty	Perfume	Perfume Model-865	PROD7216	8	421.86	3374.88	0%	0	3374.88	Wallet	Ir
CUST9104	Central	Raipur	Offline	Clothing	Jeans	Jeans Model-425	PROD3504	6	598.63	3591.78	20%	718.36	2873.42	Card	R
CUST2352	Central	Raipur	Offline	Beauty	Perfume	Perfume Model-602	PROD6067	6	458.65	2751.9	20%	550.38	2201.52	Card	Ir
CUST7671	North	Lucknow	Offline	Electronics	Laptop	Laptop Model-382	PROD3483	1	306	306	20%	61.2	244.8	COD	R
CUST7797	North	Delhi	Online	Electronics	Tablet	Tablet Model-228	PROD8665	4	825.44	3301.76	5%	165.09	3136.67	Card	D

6. KPI Creation

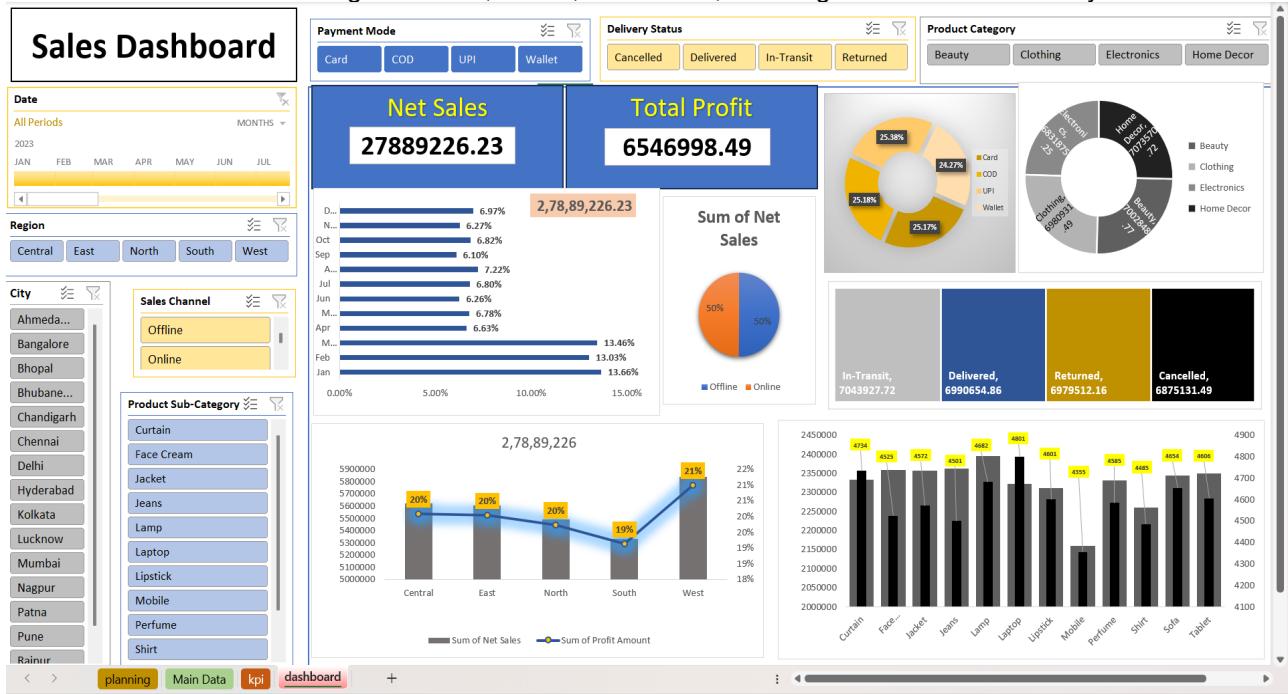
KPI cards such as Net Sales and Total Profit were created to present high-level performance metrics.

305365015	2702324.27	Row Label - Sum of Net £ Sum of Profit Amount	27889226.2	Row Label - Sum of Net £ Sum of Profit Amount	27889226.2	Row Label - Sum of Net £ Average of Discount %	92%	Row Label - Sum of Net £ Sum of Quantity Sold	4734
305365015	2702324.27	Central	5621721.01	Ahmedabad	1886378.15	Offline	1388129.74	Curtain	233303.83
		East	6504598.96	Bangalore	1755655.74	Online	1380198.49	Face Cream	239377.03
		North	549713.39	Bhopal	1770062.2	Grand Total	27889226.2	Jacket	237243.62
		South	533377.25	Bhubanesw	1832393.51			Jeans	238343.57
		West	630516.62	Chandigarh	1762760.81			Lambs	236237.82
		Grand Total	27889226.2	Chennai	184538.43			Laptop	232282.12
27889226.23	6546998.49	Delhi	177238.65	Delhi	42205.76			Lipstick	237095.2
Sum of Net Sales	Sum of Profit Amount	Hyderabad	177238.65	Goa	42020.16			Mobile	236232.53
2708326.23	6546998.49	Kolkata	123019.41	Kolkata	452394.41			Perfume	231276.54
Row Labels - Sum of Net Sales	Row Labels - Sum of Net Sales	Lucknow	185685.93	Lucknow	468252.65			Shirt	236022.3
Card	25.0%	Mumbai	189476.61	Mumbai	446233.57			Sofa	234352.07
CCD	25.0%	Nagpur	178862.28	Nagpur	422537.88			Tablet	235024.81
UPI	25.38%	Pahna	178920.04	Pahna	417201.92			Grand Total	27889226.2
Wallet	24.27%	Pune	205070.86	Pune	478163.02				55101
Grand Total	100.00%	Rajpur	205236.53	Rajpur	497903.52				
Row Labels - Sum of Net Average of Profit Margin %	Row Labels - Sum of Net Average of Profit Margin %	Grand Total	27889226.2	Grand Total	6546998.49	Row Labels - Sum of Net Sales		Row Labels - Sum of Net Sales	
Beauty	24%					Cancelled	687531.49	Cancelled	687531.49
Clothing	23%					Delivered	639054.96	Delivered	639054.96
Electronics	23%					In-Transit	704392.72	In-Transit	704392.72
Home Decor	24%					Returned	637952.16	Returned	637952.16
Grand Total	27889226.2					Grand Total	27889226.2		
Row Labels - Sum of Net Sales	Row Labels - Sum of Net Sales								
Jan	301476.65								
Feb	328392.29								
Mar	378279.98								
Apr	194339.19								
May	188973.95								
Jun	174695.51								
Jul	189504.2								
Aug	201459.73								
Sep	169980.76								
Oct	190261.62								
Nov	174888.13								
Dec	184492.34								
Grand Total	27889226.2								

planning Main Data kpi dashboard +

7. Final Dashboard

The final dashboard integrates KPIs, charts, and slicers, enabling interactive sales analysis.



8. Key Insights

- Regional and category-wise sales performance variation
- Balanced contribution from online and offline channels
- Product-level profit margin comparison
- Clear visibility of delivery status and returns
- Discount impact on net sales and profit

9. Conclusion

This project demonstrates practical Excel-based MIS reporting skills, from planning and data preparation to dashboard design.