

Coffee Bean Orders Logbook

This document are the steps taken to clean and transform the data as well as how the Dashboard was created in Excel.

1. *Order Date* type is formatted to data (dd-mmm-yyyy)
2. *Quantity* type is formatted to number (no decimal)
3. *Size* is formatted to number and unit's "kg" added
4. *Unit Price* is formatted to currency (USD)
5. *Price per 100g* is formatted to currency (USD)
6. *Profit* is formatted to currency (USD)
7. Add the *Customer Name, Email, Country* data into the *orders* sheet from the *customers* sheet [XLOOKUP and IF statements]
8. Add the *Coffee Type, Roast Type, Size* and *Unit Price* into the *orders* sheet from the *products* sheet [XLOOKUP]
9. *Size* is formatted into a number and *Unit Price* is formatted into currency (USD)
10. *Sales* column formula = *Unit Price* * *Quantity*
11. Create new columns *Coffee Type Name* and *Roast Type Name* to get the full names from the abbreviations in *Coffee Type* and *Roast Type* [IF statements]
12. Check for Duplicates and removed duplicates
13. Convert *orders* sheet into a table
14. Pivot Table for Total Sales (used to create the line chart and timeline) [Pivot Table]
15. Slicers added for *Size, Roast Type Name* and *Loyalty Card*
16. Pivot Table for Sales by Country (used to create the bar graph) [Pivot Table]

17. Pivot Table for Top 5 Customers (used to create the bar graph) [Pivot Table]

Links

The dataset was downloaded from GitHub at

<https://github.com/mochen862/excel-project-coffee-sales>

Coffee Beans Image:

<https://pixabay.com/photos/coffee-coffee-beans-cup-coffee-cup-171653/>