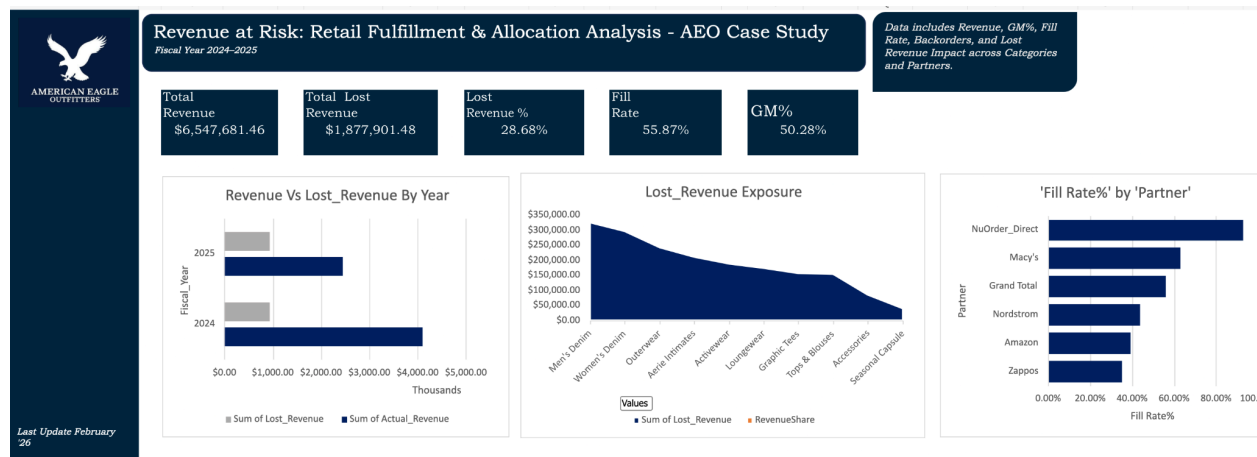


AEO Retail Analysis

Revenue at Risk: Retail Fulfillment & Allocation Analysis — AEO Case Study (FY 2024–2025)



1) Executive Summary

This project quantifies revenue at risk due to fulfillment constraints (backorders) across two fiscal years and multiple wholesale/B2B partners (e.g., Macy's, Nordstrom, NuOrder Direct, Amazon) and product categories. The dashboard provides a decision-ready view of:

- Total revenue delivered
- Estimated revenue at risk ("lost revenue")
- Fill rate performance
- Gross margin performance
- Where risk concentrates by category and partner
- How risk changes year-over-year (hindsight view)

This analysis is structured like a real retail planning workflow: plan → allocate → fulfill → measure → diagnose → recommend.

2) Business Problem Being Solved

Retail product teams supporting B2B/wholesale and digital ordering platforms (NuOrder-style) must balance demand, inventory, and partner allocation. When inventory or allocation does not meet planned demand, backorders increase, fill rate drops, and revenue is either delayed or lost.

Key business questions:

1. How much revenue is at risk due to backorders?
 2. Which categories contribute most to lost revenue exposure?
 3. Which partners show the weakest fill performance?
 4. Is the situation improving or worsening year-over-year (hindsight)?
 5. Where should merchandising and allocation strategy focus next?
-

3) Why This Matters for Retail / Product Teams

This dashboard supports the kinds of decisions a retail product manager (and their analyst) makes every week:

- Assortment planning: identify which categories drive revenue and which categories drive risk.
 - Volume planning: compare planned vs fulfilled units via fill rate and backorders.
 - Merchandising strategy: protect high-revenue categories and fix under-fulfilled assortments.
 - Financial planning: quantify lost revenue impact and connect ops issues to revenue outcomes.
 - Partner management: measure which partners experience the highest service gaps.
 - Hindsight analysis: understand what changed year-over-year and what to fix next cycle.
-

4) Data + Measures Used

This project uses a generated retail planning dataset designed to mimic B2B/wholesale operational realities across two fiscal years.

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	Fiscal_Yr	Date	Week_End	Season	Partner	Category	Planned_Un	Allocated_Un	Backorder_Un	Actual_Un	Actual_Reve	Actual_GM_Dol	Avg_Fill_Rt	Avg_Forecast_Accu	Avg_Markdown_R	Lost_Revenue	Unit_Price	Actual_GM	Actual_GM_1
3	2024	1/1/2024	1	Spring	Amazon	Accessories	4	4	0	4	106.2	65.8	1	0.023	0	0	26.55	0.96	0.96
4	2024	1/1/2024	1	Spring	Amazon	Graphic Tees	11	11	0	11	142.89	85.14	1	0.9	0.027	0	12.99	0.59	0.59
5	2024	1/1/2024	1	Spring	Amazon	Men's Denim	6	6	0	6	396.46	212.38	1	1	0.029	0	66.0766667	0.53	0.53
6	2024	1/1/2024	1	Spring	Amazon	Seasonal Capsu	1	1	0	1	64.56	33.14	1	1	0.031	0	64.56	0.51	0.51
7	2024	1/1/2024	1	Spring	Amazon	Tops & Blouses	2	2	0	2	55.68	29.5	1	1	0.019	0	27.84	0.5	0.5
8	2024	1/1/2024	1	Spring	Macy's	Accessories	3	3	0	3	79.5	49.2	1	1	0.025	0	26.5	0.61	0.61
9	2024	1/1/2024	1	Spring	Macy's	Aerie Intimates	3	3	0	3	60.57	34.92	1	1	0.011	0	20.19	0.57	0.57
10	2024	1/1/2024	1	Spring	Macy's	Graphic Tees	6	6	0	6	77.22	45.72	1	1	0.036	0	12.87	0.59	0.59
11	2024	1/1/2024	1	Spring	Macy's	Men's Denim	6	6	0	6	400.34	216.26	1	1	0.023	0	66.7233333	0.5	0.5
12	2024	1/1/2024	1	Spring	Macy's	Seasonal Capsu	13	13	0	13	1168.15	596.13	1	0.9615	0.025	0	89.85769231	0.5	0.5
13	2024	1/1/2024	1	Spring	Macy's	Tops & Blouses	1	1	0	1	27.46	14.37	1	1	0.032	0	27.46	0.52	0.52
14	2024	1/1/2024	1	Spring	Nordstrom	Accessories	2	2	0	2	53.18	32.98	1	1	0.021	0	26.59	0.6	0.6
15	2024	1/1/2024	1	Spring	Nordstrom	Graphic Tees	4	4	0	3	39.45	23.7	1	0.75	0.015	0	9.8625	0.68	0.68
16	2024	1/1/2024	1	Spring	Nordstrom	Men's Denim	1	1	0	1	57.57	30.05	1	1	0.029	0	57.57	0.52	0.52
17	2024	1/1/2024	1	Spring	Nordstrom	Seasonal Capsu	8	8	0	8	728	367.6	1	0.857	0.028	0	91	0.50	0.50
18	2024	1/1/2024	1	Spring	Nordstrom	Tops & Blouses	1	1	0	1	28.08	14.99	1	1	0.011	0	28.08	0.53	0.53
19	2024	1/1/2024	1	Spring	NuOrder_Dire	Accessories	2	2	0	2	53.5	33.3	1	1	0.016	0	26.75	0.62	0.62
20	2024	1/1/2024	1	Spring	NuOrder_Dire	Aerie Intimates	2	2	0	2	39.88	22.78	1	1	0.024	0	19.94	0.57	0.57
21	2024	1/1/2024	1	Spring	NuOrder_Dire	Graphic Tees	4	4	0	4	52.16	31.16	1	1	0.023	0	13.04	0.59	0.59
22	2024	1/1/2024	1	Spring	NuOrder_Dire	Men's Denim	1	1	0	1	57.38	29.86	1	1	0.033	0	57.38	0.5	0.5
23	2024	1/1/2024	1	Spring	NuOrder_Dire	Seasonal Capsu	8	8	0	8	703.48	356.71	1	1	0.024	0	87.935	0.50	0.50
24	2024	1/1/2024	1	Spring	Zappos	Accessories	1	1	0	1	26.63	16.53	1	1	0.02	0	26.63	0.62	0.62
25	2024	1/1/2024	2	Spring	Amazon	Accessories	16	16	0	16	287.97	172.9	1	0.875	0.0325	0	17.998125	0	0
26	2024	1/1/2024	2	Spring	Amazon	Graphic Tees	9	9	0	9	117	69.75	1	0.9	0.026	0	13	0.59	0.59
27	2024	1/1/2024	2	Spring	Amazon	Men's Denim	17	17	0	17	1082.21	544.68	1	0.96425	0.026	0	63.6594176	0.50	0.50
28	2024	1/1/2024	2	Spring	Amazon	Outerwear	7	7	0	7	763.84	342.02	1	1	0.014	0	109.12	0.44	0.44
29	2024	1/1/2024	2	Spring	Amazon	Seasonal Capsu	1	1	0	1	64.16	32.74	1	1	0.037	0	64.16	0.5	0.5
30	2024	1/1/2024	2	Spring	Amazon	Tops & Blouses	2	2	0	2	55.58	29.4	1	1	0.021	0	27.79	0.52	0.52
31	2024	1/1/2024	2	Spring	Amazon	Women's Denim	5	5	0	4	160.52	81.4	1	1	0.018	0	32.104	0.50	0.50
32	2024	1/1/2024	2	Spring	Macy's	Accessories	11	11	0	11	193.73	116.47	1	0.9285	0.0285	0	17.61181818	0.60	0.60
33	2024	1/1/2024	2	Spring	Macy's	Activewear	3	3	0	3	78.72	38.82	1	0.032	0	26.24	0.48	0.48	0.48
34	2024	1/1/2024	2	Spring	Macy's	Aerie Intimates	2	2	0	2	40.24	23.14	1	0.015	0	20.12	0.57	0.57	0.57
35	2024	1/1/2024	2	Spring	Macy's	Graphic Tees	42	42	0	42	894.83	524.43	1	0.939666667	0.027	0	21.30547619	0.58	0.58
36	2024	1/1/2024	2	Spring	Macy's	Men's Denim	13	13	0	13	824.27	410.4	1	1	0.03125	0	63.40538462	0.49	0.49
37	2024	1/1/2024	2	Spring	Macy's	Outerwear	5	5	0	5	534.3	233	1	1	0.034	0	106.86	0.43	0.43
38	2024	1/1/2024	2	Spring	Macy's	Seasonal Capsu	12	12	0	11	960.89	478.97	1	0.8845	0.0405	0	80.07416667	0.49	0.49
39	2024	1/1/2024	2	Spring	Macy's	Tops & Blouses	1	1	0	1	27.34	14.25	1	1	0.037	0	27.34	0.52	0.52
40	2024	1/1/2024	2	Spring	Macy's	Women's Denim	7	7	0	7	281.59	142.71	1	1	0.026	0	40.22714286	0.50	0.50
41	2024	1/1/2024	2	Spring	Nordstrom	Accessories	8	8	0	7	123.36	73.81	1	0.9165	0.0335	0	15.42	0.59	0.59
42	2024	1/1/2024	2	Spring	Nordstrom	Activewear	1	1	0	1	26.08	12.78	1	1	0.038	0	26.08	0.4	0.4
43	2024	1/1/2024	2	Spring	Nordstrom	Graphic Tees	32	32	0	29	615.78	360.54	1	0.883666667	0.028	0	19.243125	0.58	0.58
44	2024	1/1/2024	2	Spring	Nordstrom	Loungewear	1	1	0	1	27.81	15.75	1	1	0.013	0	27.81	0.56	0.56

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Fiscal_Year	Sum of Actual Revenue	Sum of Actual_GM_Dollars	Sum of Allocated_Units	Sum of Backorder_Units	GM%	Fill Rate%	
2024	\$4,103,532.37	\$2,093,993.94	104,481	48,351		51.03%	68.36%
2025	\$2,444,149.09	\$1,198,446.65	64,373	85,000		49.03%	43.10%
Grand Total	\$6,547,681.46	\$3,292,440.59	168,854	133,351		50.28%	55.87%

Partner	Sum of Actual Revenue	Sum of Actual_GM_Dollars	Sum of Allocated_Units	Sum of Backorder_Units	GM%	Fill Rate%	Partner
Amazon	\$1,230,175.59	\$628,071.36	32,036	49,713		51.06%	39.19% Amazon
Macy's	\$2,358,204.09	\$1,180,756.11	61,600	36,109		50.07%	63.04% Macy's
Nordstrom	\$964,293.29	\$494,089.11	23,695	30,340		51.24%	43.85% Nordstrom
NuOrder_Direct	\$1,666,406.92	\$821,182.17	43,965	3,283		49.28%	93.05% NuOrder_Direct
Zappos	\$328,601.57	\$168,341.84	7,558	13,906		51.23%	35.21% Zappos
Grand Total	\$6,547,681.46	\$3,292,440.59	168,854	133,351		50.28%	55.87% Grand Total

Category	Sum of Actual Revenue	Sum of Allocated_Units	Sum of Backorder_Units	Percentage_Of_Total	Fill Rate%	
Women's Denim	\$1,130,551.49	23,230	19,373	17.27%		55%
Men's Denim	\$1,057,780.54	19,015	15,241	16.16%		56%
Outerwear	\$806,189.89	9,545	7,863	12.31%		55%
Aerie Intimates	\$679,643.76	26,894	20,687	10.38%		57%
Activewear	\$651,610.61	15,651	12,410	9.95%		56%
Loungewear	\$575,493.07	14,841	11,637	8.79%		56%
Tops & Blouses	\$513,575.86	16,501	13,576	7.84%		55%
Graphic Tees	\$489,493.05	24,767	21,005	7.48%		54%
Seasonal Capsu	\$366,097.61	5,696	1,189	5.59%		83%
Accessories	\$277,245.58	12,714	10,370	4.23%		55%
Grand Total	\$6,547,681.46	168,854	133,351	100.00%		56%

Dimensions (how we slice performance)

- Fiscal Year (FY 2024, FY 2025)
- Partner (Macy's, Nordstrom, NuOrder Direct, Amazon, Zappos, etc.)
- Category (Women's Denim, Men's Denim, Outerwear, Aerie Intimates, etc.)

Category	Sum of Lost_Revenue	RevenueShare	Category	Sum of Actual_Revenue	Sum of Lost_Revenue	Lost Revenue % of Category Revenue
Men's Denim	\$326,722.54	17.40%	Accessories	\$277,245.58	\$85,236.31	30.74'
Women's Denim	\$297,894.16	15.86%	Activewear	\$651,610.61	\$189,356.09	29.06'
Outerwear	\$241,579.79	12.86%	Aerie Intimates	\$679,643.76	\$211,333.61	31.09'
Aerie Intimates	\$211,333.61	11.25%	Graphic Tees	\$489,493.05	\$156,968.46	32.07'
Activewear	\$189,356.09	10.08%	Loungewear	\$575,493.07	\$173,332.13	30.12'
Loungewear	\$173,332.13	9.23%	Men's Denim	\$1,057,780.54	\$326,722.54	30.89'
Graphic Tees	\$156,968.46	8.36%	Outerwear	\$806,189.89	\$241,579.79	29.97'
Tops & Blouses	\$154,233.70	8.21%	Seasonal Capsule	\$366,097.61	\$41,244.69	11.27'
Accessories	\$85,236.31	4.54%	Tops & Blouses	\$513,575.86	\$154,233.70	30.03'
Seasonal Capsule	\$41,244.69	2.20%	Women's Denim	\$1,130,551.49	\$297,894.16	26.35'
Grand Total	\$1,877,901.48	100.00%	Grand Total	\$6,547,681.46	\$1,877,901.48	28.68'

Fiscal_Year	Sum of Actual_Rever	Sum of Lost_Revenue	Lost Revenue % by Year	Fiscal year	Lost Revenue % by Year2
2024	\$4,103,532.37	\$941,768.00	22.95%	2024	22.95%
2025	\$2,444,149.09	\$936,133.48	38.30%	2025	38.30%
Grand Total	\$6,547,681.46	\$1,877,901.48	28.68%		

Fiscal_Year	Sum of Actual_Revenue
2024	\$4,103,532.37
2025	\$2,444,149.09
Grand Total	\$6,547,681.46

Date

Jun 2025 MONTHS

2025

JUN JUL AUG SEP OCT NOV DEC

Core metrics (what we measure)

- Actual Revenue – revenue achieved from fulfilled units
- Gross Margin % (GM%) – margin efficiency indicator
- Allocated Units – units assigned/available for fulfillment
- Backorder Units – unmet demand (demand not fulfilled)
- Fill Rate – service level indicator
- Lost Revenue (Estimated) – financial impact of backorders

5) Key Calculations (Business Logic)

Fill Rate

Fill Rate is a standard retail service metric:

Fill Rate = $\text{Allocated Units} / (\text{Allocated Units} + \text{Backorder Units})$

Interpretation:

- Higher = better service level (demand met)
- Lower = allocation/inventory constraints or demand planning gaps

Lost Revenue (Estimated)

The goal was to quantify revenue at risk without needing “planned revenue.”

A practical approximation used:

1. Unit Price proxy

Because there were edge cases where Actual Units = 0, we used a stable denominator to avoid divide-by-zero:

Unit Price = $\text{Actual Revenue} / \text{Planned Units}$

2. Lost Revenue

Lost Revenue = Backorder Units × Unit Price

Interpretation:

- This is an estimate of revenue not captured (or delayed) due to unfulfilled units.
- It's a "finance translation" of operational constraints.

Lost Revenue %

A top-level risk signal:

Lost Revenue % = Lost Revenue / Actual Revenue

This gives leadership an immediate sense of how big the fulfillment gap is relative to delivered sales.

6) Process / Workflow (What We Actually Did)

Step A — Build the dataset + export

- Generated multi-year retail planning dataset via Python
- Exported to CSV files for analysis in Excel (Mac-compatible)

Step B — Set up Excel model

- Imported the CSV files into Excel Online
- Converted ranges into tables for consistent pivot behavior
- Built pivot tables for Year / Partner / Category performance

Step C — Derived retail KPIs

From pivot summaries, we created:

- Fill Rate
- GM%
- Lost Revenue
- Lost Revenue %

Step D — Dashboard construction

Created an executive view with:

- KPI tiles for totals
- Charts for:
 1. Revenue vs Lost Revenue by Year
 2. Lost Revenue Exposure by Category

3. Fill Rate by Partner

7) Dashboard Walkthrough

Your dashboard is already organized in the correct executive storytelling order.

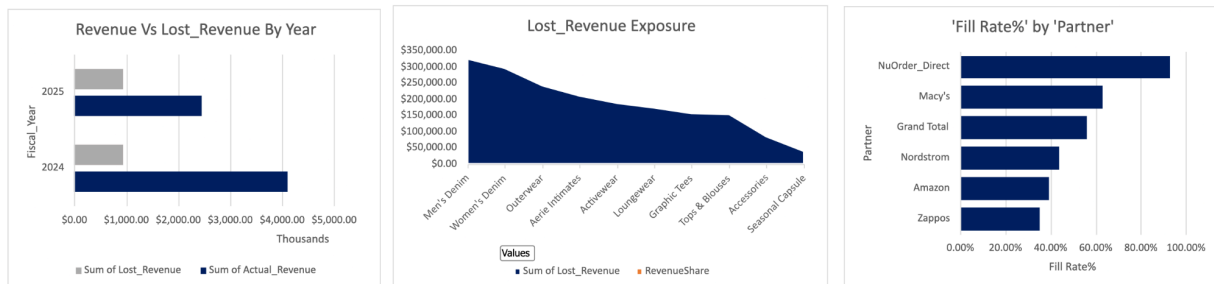
A) KPI tiles (top row)

These answer: “How big is the problem?”

- Total Revenue: \$6.55M
- Total Lost Revenue: \$1.88M
- Lost Revenue %: 28.68%
- Fill Rate: 55.87%
- GM%: 50.28%

Interpretation:

Revenue is strong, but service level is weak and revenue at risk is material. This is the exact type of insight product + planning teams need to prioritize fixes.



B) Chart 1 — Revenue vs Lost Revenue by Year

This answers: “Is risk improving or worsening over time?”

- FY2024 Lost Revenue %: 22.95%
- FY2025 Lost Revenue %: 38.30%

Interpretation:

The business is moving in the wrong direction year-over-year (hindsight insight). That triggers planning actions like revisiting allocation rules, demand assumptions, safety stock, or lead time constraints.

C) Chart 2 — Lost Revenue Exposure (by Category)

This answers: “Where is the revenue risk concentrated?”

Top lost revenue categories (from your pivot):

- Men’s Denim
- Women’s Denim
- Outerwear
- Aerie Intimates
- Activewear

Interpretation:

These categories are likely:

- high demand
- constrained inventory
- under-allocated vs demand
- or forecasted inaccurately

For a product team, this translates directly into assortment + inventory + allocation focus areas.

D) Chart 3 — Fill Rate by Partner

This answers: “Which channel partners are being impacted most?”

From your view, NuOrder Direct has the best fill rate, while partners like Amazon/Zappos appear lower.

Interpretation:

This is a realistic retail situation: partners may receive different allocations based on priority rules, contract SLAs, profitability, or strategic importance. This chart helps the PM decide:

- where to improve service
 - where to renegotiate expectations
 - or where to adjust allocation logic
-

8) What This Demonstrates (Retail Analyst Fit)

This case study is strong because it demonstrates retail thinking, not just Excel skill.

Retail Planning Coverage (directly mapping to the hiring manager’s requirements)

Budget / Financial Planning

- Quantified revenue risk (\$1.88M) and risk rate (28.68%)
- Connected operational constraints to financial impact

Merchandising

- Pinpointed which categories drive risk and require focus

Assortment Planning

- Category-level diagnosis shows assortment-level performance differences

Volume Planning

- Used units metrics (Allocated, Backorder) and service level (Fill Rate)

Hindsight Analysis

- Year-over-year comparison shows risk increase from FY2024 → FY2025

B2B / Wholesale / NuOrder platform relevance

- Partner-level views replicate real wholesale planning and allocation analysis
-

9) Recommended Next Actions (If Asked in Interview)

What we can do with this

1. Prioritize top 3 categories by lost revenue (e.g., Denim + Outerwear)
 - investigate inventory constraints, forecast error, or allocation strategy
 2. Partner strategy review
 - compare partner fill rate vs revenue contribution
 - determine whether allocation priorities match business strategy
 3. Root-cause drilldown (next iteration)
 - add week/month trend for backorders
 - add SKU-level hotspot view (Top 20 SKUs driving lost revenue)
 4. Operational improvement
 - adjust replenishment or safety stock on high-risk categories
 - tighten forecasting assumptions where year-over-year deterioration is visible
-

Conclusion:

Built an Excel-based retail planning dashboard (FY2024–2025) analyzing revenue performance, gross margin, fill rate, backorders, and estimated lost revenue across wholesale/B2B partners and merchandise categories to quantify “revenue at risk” and support assortment, allocation, and hindsight planning decisions.

Coca Cola Retail Study

The "Retail-First" Project Walkthrough

I focused on demonstrating the exact hindsight analysis and B2B partner logic required for the AEO role.

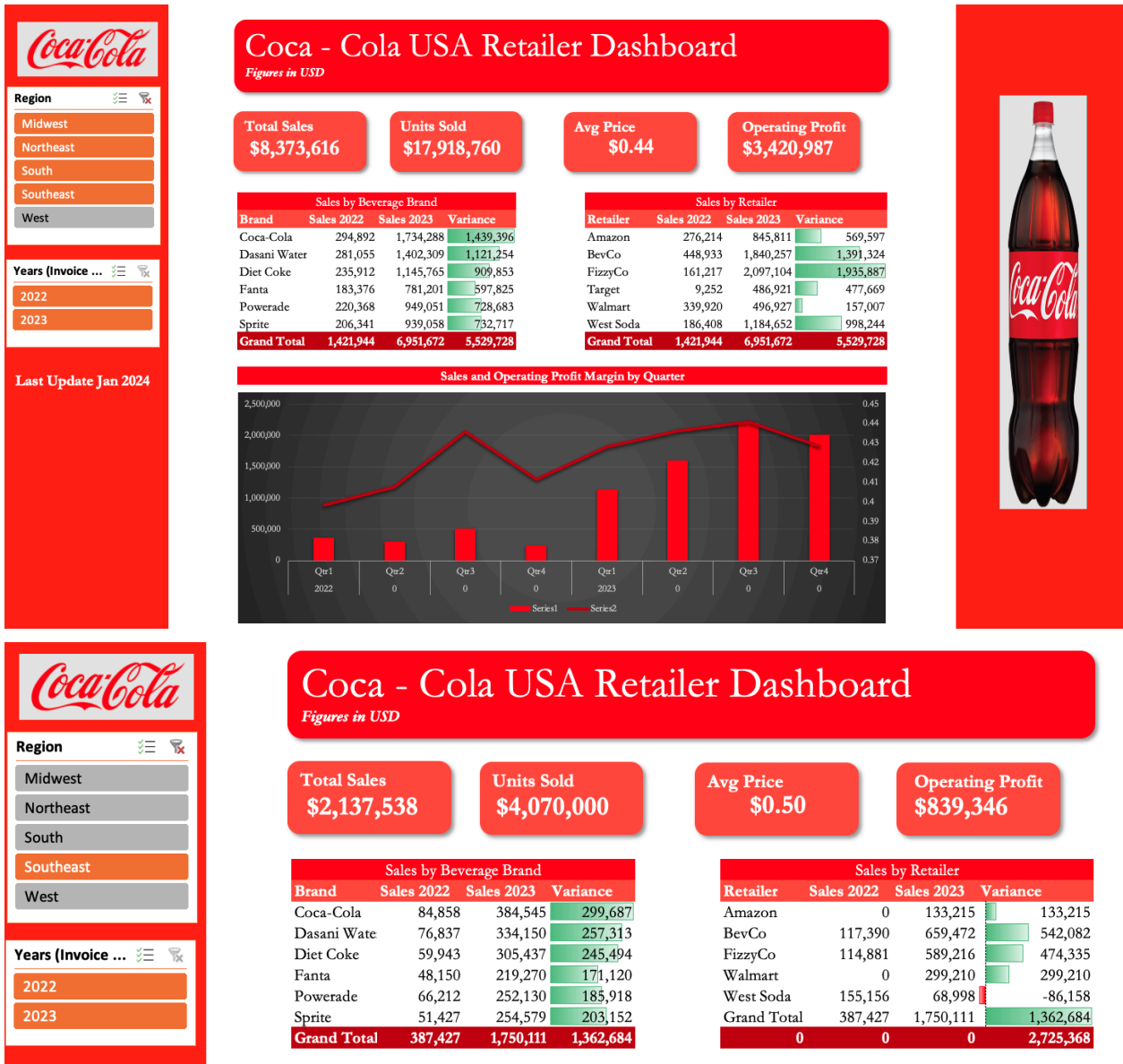
- The Data Engine (The Raw Layer): I started with a granular Retailer Dataset. I engineered this to handle multi-dimensional data, including Retailer IDs, Invoice Dates, and specific Beverage (**Coca Cola- Case Study**) Brands. I ensured every transaction tracks Units Sold, Price per Unit, and Operating Margin, this is the foundational data needed for any Merchandise Financial Plan.
- The Planning Logic (The Pivot Layer): I then built a 'Connected Planning' engine using Pivot Tables. This allowed me to perform Hindsight Analysis by comparing Sales 2022 vs. 2023 to identify volume variances. I specifically focused on Sum of Total Sales across retailers like Amazon and Walmart, which mimics how I would manage AEO's B2B partners like Macy's or Nordstrom on the NuOrder platform.
- The Strategic Insights (The Dashboard): The final output is a Retailer Dashboard. It provides an immediate view of our Operating Profit (\$4.7M) and Total Units Sold (\$24.7M). More importantly, it features a Sales and Operating Profit Margin by Quarter chart. This tells the 'story' of our Assortment Planning, showing exactly when and where our margins spiked so leadership can optimize inventory allocation for the next season.

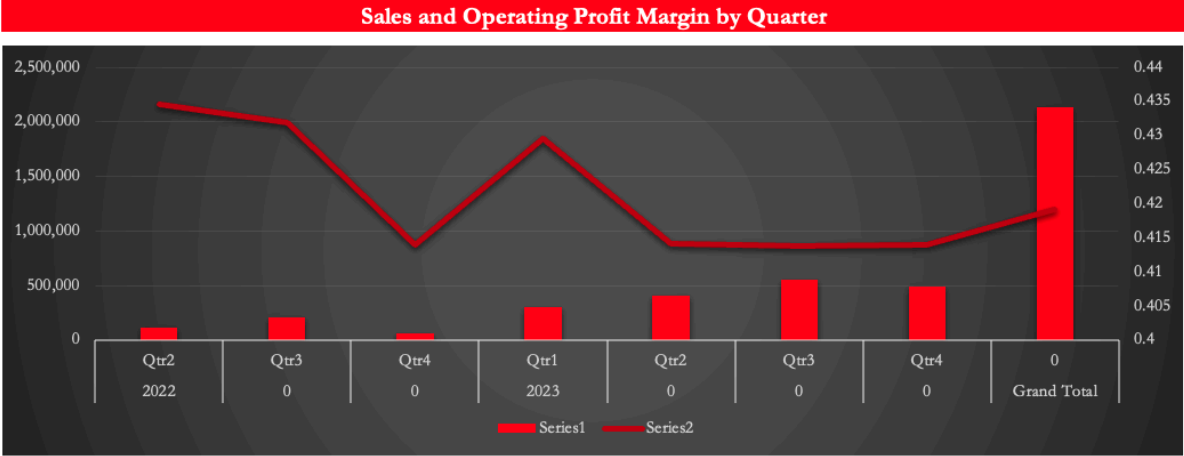
While I built this in Excel, the data modeling logic, reconciling transaction-level data into high-level business rules, is exactly what powers an Anaplan model. I'm ready to bring this same rigor to AEO.

Raw Data : 10000 Rows

Retailer Dataset											
Retailer	Retailer ID	Invoice Date	Region	State	City	Beverage Brand	Price per Unit	Units Sold	Total Sale	Operating Profit	Operating Margin
BevCo	1185732	1/1/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,000	\$6,000	\$3,000	50%
BevCo	1185732	1/2/22	Northeast	New York	New York	Diet Coke	\$0.50	10,000	\$5,000	\$1,500	30%
BevCo	1185732	1/3/22	Northeast	New York	New York	Sprite	\$0.40	10,000	\$4,000	\$1,400	35%
BevCo	1185732	1/4/22	Northeast	New York	New York	Fanta	\$0.45	8,500	\$3,825	\$1,339	35%
BevCo	1185732	1/5/22	Northeast	New York	New York	Powerade	\$0.60	9,000	\$5,400	\$1,620	30%
BevCo	1185732	1/6/22	Northeast	New York	New York	Dasani Water	\$0.50	10,000	\$5,000	\$1,250	25%
BevCo	1185732	1/7/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,500	\$6,250	\$3,125	50%
BevCo	1185732	1/8/22	Northeast	New York	New York	Diet Coke	\$0.50	9,000	\$4,500	\$1,350	30%
BevCo	1185732	1/21/22	Northeast	New York	New York	Sprite	\$0.40	9,500	\$3,800	\$1,330	35%
BevCo	1185732	1/22/22	Northeast	New York	New York	Fanta	\$0.45	8,250	\$3,713	\$1,299	35%
BevCo	1185732	1/23/22	Northeast	New York	New York	Powerade	\$0.60	9,000	\$5,400	\$1,620	30%
BevCo	1185732	1/24/22	Northeast	New York	New York	Dasani Water	\$0.50	10,000	\$5,000	\$1,250	25%
BevCo	1185732	1/25/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,200	\$6,100	\$3,050	50%
BevCo	1185732	1/26/22	Northeast	New York	New York	Diet Coke	\$0.50	9,250	\$4,625	\$1,388	30%
BevCo	1185732	1/27/22	Northeast	New York	New York	Sprite	\$0.40	9,500	\$3,800	\$1,330	35%
BevCo	1185732	1/28/22	Northeast	New York	New York	Fanta	\$0.45	8,000	\$3,600	\$1,260	35%
BevCo	1185732	1/29/22	Northeast	New York	New York	Powerade	\$0.60	8,500	\$5,100	\$1,530	30%
BevCo	1185732	1/30/22	Northeast	New York	New York	Dasani Water	\$0.50	9,500	\$4,750	\$1,188	25%
BevCo	1185732	1/31/22	Northeast	New York	New York	Coca-Cola	\$0.50	12,000	\$6,000	\$3,000	50%
BevCo	1185732	2/1/22	Northeast	New York	New York	Diet Coke	\$0.50	9,000	\$4,500	\$1,350	30%
BevCo	1185732	2/2/22	Northeast	New York	New York	Sprite	\$0.40	9,000	\$3,600	\$1,260	35%
BevCo	1185732	2/3/22	Northeast	New York	New York	Fanta	\$0.45	8,250	\$3,713	\$1,299	35%
BevCo	1185732	2/4/22	Northeast	New York	New York	Powerade	\$0.60	8,250	\$4,950	\$1,485	30%
BevCo	1185732	2/5/22	Northeast	New York	New York	Dasani Water	\$0.50	9,500	\$4,750	\$1,188	25%
BevCo	1185732	2/6/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,200	\$7,320	\$3,660	50%
BevCo	1185732	2/7/22	Northeast	New York	New York	Diet Coke	\$0.55	9,250	\$5,088	\$1,526	30%
BevCo	1185732	2/8/22	Northeast	New York	New York	Sprite	\$0.50	9,000	\$4,500	\$1,575	35%
Amazon	1185732	2/9/22	Northeast	New York	New York	Fanta	\$0.50	8,500	\$4,250	\$1,488	35%
Amazon	1185732	2/10/22	Northeast	New York	New York	Powerade	\$0.60	8,750	\$5,250	\$1,575	30%
Amazon	1185732	3/3/22	Northeast	New York	New York	Dasani Water	\$0.65	10,000	\$6,500	\$1,625	25%
Amazon	1185732	3/4/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,500	\$7,500	\$3,750	50%
Amazon	1185732	3/5/22	Northeast	New York	New York	Diet Coke	\$0.55	10,000	\$5,500	\$1,650	30%
Amazon	1185732	3/6/22	Northeast	New York	New York	Sprite	\$0.50	9,250	\$4,625	\$1,619	35%
Amazon	1185732	3/7/22	Northeast	New York	New York	Fanta	\$0.50	9,000	\$4,500	\$1,575	35%
Amazon	1185732	3/8/22	Northeast	New York	New York	Powerade	\$0.60	9,000	\$5,400	\$1,620	30%
Amazon	1185732	3/9/22	Northeast	New York	New York	Dasani Water	\$0.65	10,500	\$6,825	\$1,706	25%
Amazon	1185732	3/10/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,750	\$7,650	\$3,825	50%
Amazon	1185732	3/11/22	Northeast	New York	New York	Diet Coke	\$0.55	10,250	\$5,638	\$1,691	30%
Amazon	1185732	3/12/22	Northeast	New York	New York	Sprite	\$0.50	9,500	\$4,750	\$1,663	35%
Amazon	1185732	3/13/22	Northeast	New York	New York	Fanta	\$0.50	9,000	\$4,500	\$1,575	35%
Amazon	1185732	3/14/22	Northeast	New York	New York	Powerade	\$0.60	9,250	\$5,550	\$1,665	30%
Amazon	1185732	3/15/22	Northeast	New York	New York	Dasani Water	\$0.65	11,000	\$7,150	\$1,788	25%
Amazon	1185732	3/16/22	Northeast	New York	New York	Coca-Cola	\$0.60	12,500	\$7,500	\$3,750	50%
Amazon	1185732	3/17/22	Northeast	New York	New York	Diet Coke	\$0.55	10,250	\$5,638	\$1,691	30%
Amazon	1185732	3/18/22	Northeast	New York	New York	Sprite	\$0.50	9,500	\$4,750	\$1,663	35%

Dynamic Dashboard with Power Pivots and Chart





3	Sum of Total Sales		Sum of Units Sold		Average of Price per Unit		Sum of Operating Profit	
4	\$2,137,538		\$4,070,000		\$0.50		\$839,346	
5								
6								
7								
8	Sum of Total Sales		Column Labels					
9	Row Labels	2022	2023	Grand Total			Sum of Total Sales	Column Labels
10	Coca-Cola		\$84,858	\$384,545	\$469,403			
11	Dasani Water		\$76,837	\$334,150	\$410,987			
12	Diet Coke		\$59,943	\$305,437	\$365,380			
13	Fanta		\$48,150	\$219,270	\$267,420			
14	Powerade		\$66,212	\$252,130	\$318,342			
15	Sprite		\$51,427	\$254,579	\$306,006			
16	Grand Total		\$387,427	\$1,750,111	\$2,137,538			
17								
18								
19								
20	Years (Invoice Date)	Quarters (Invoice Date)	Sum of Total Sales	Average of Operating Margin				
21	2022	Qtr2	\$113,573	43%	2022	Qtr2	113573	0.4345
22		Qtr3	\$213,382	43%	0	Qtr3	213382	0.431973684
23		Qtr4	\$60,472	41%	0	Qtr4	60472	0.413928571
24	2023	Qtr1	\$299,153	43%	2023	Qtr1	299153	0.429481481
25		Qtr2	\$412,253	41%	0	Qtr2	412253	0.414148148
26		Qtr3	\$549,487	41%	0	Qtr3	549487	0.413777778
27		Qtr4	\$489,218	41%	0	Qtr4	489218	0.413925926
28	Grand Total		\$2,137,538	42%	Grand Total	0	2137538	0.419166667
29								
30								

