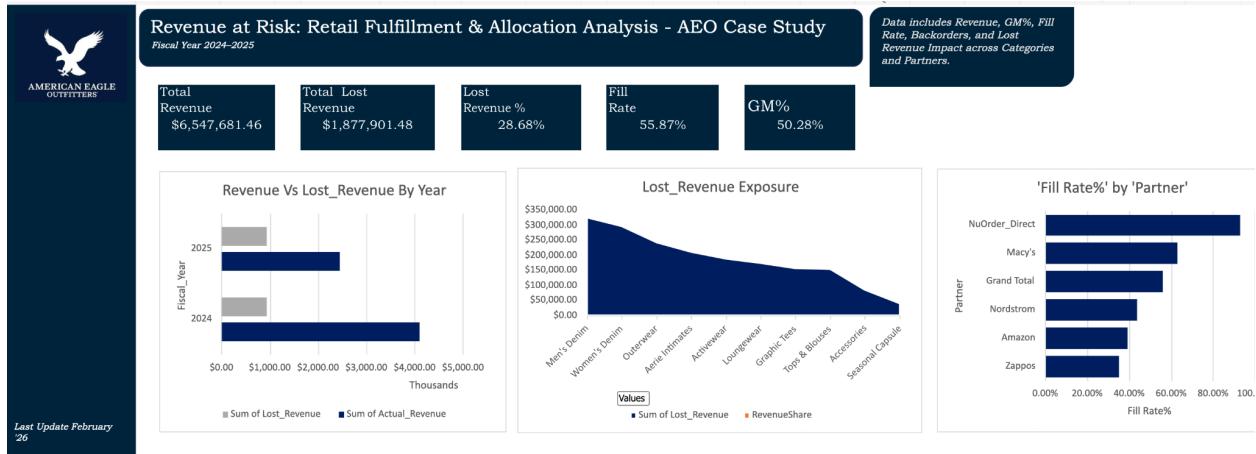


AEO Retail Analysis

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-filled 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.

Search for tools, help, and more (Option + Q) Buy Microsoft 365

File Home Insert Share Page Layout Formulas Data Review View Help Draw Table Design

Font Alignment Number Styles Cells

General Conditional Formatting Table Styles Insert Delete Format Sort & Filter Select Add-ins

N30

Actual_Year Date Week_Index Season Partner Category Planned_Units Allocated_Units Backorder_Units Actual_Units Actual_Revenue Actual_GM_Dollars Avg_Fill_Rate Avg_Forecast_Accuracy Avg_Markdown_Rate Lost_Revenue Unit_Price Actual_GM_1_Percentage

1 Spring Amazon Accessories 4 4 0 106.2 65.8 1 0.023 0 26.55 0.6

2 2024 1/1/2024 1 Spring Amazon Graphic Tees 11 11 0 114.289 85.14 1 0.027 0 12.99 0.59

3 2024 1/1/2024 1 Spring Amazon Men's Denim 6 6 0 306.46 212.38 1 0.029 0 66.07666666666666 0.53

4 2024 1/1/2024 1 Spring Amazon Seasonal Caps 1 1 0 1 64.56 331.14 1 0.031 0 11.56 0.51

5 2024 1/1/2024 1 Spring Amazon Tops & Blouses 2 2 0 2 55.68 39.5 1 0.019 0 27.84 0.58

6 2024 1/1/2024 1 Spring Macy's Accessories 3 3 0 3 79.5 49.2 1 0.025 0 26.5 0.61

7 2024 1/1/2024 1 Spring Macy's Aerie Intimates 3 3 0 3 60.57 34.92 1 0.011 0 20.19 0.57

8 2024 1/1/2024 1 Spring Macy's Graphic Tees 6 6 0 6 77.22 45.72 1 0.036 0 12.87 0.59

9 2024 1/1/2024 1 Spring Macy's Men's Denim 6 6 0 6 400.94 216.26 1 0.023 0 66.72333333333333 0.56

10 2024 1/1/2024 1 Spring Nordstrom Accessories 8 8 0 8 367.6 208.5 1 0.028 0 89.85713131313131 0.5

11 2024 1/1/2024 1 Spring Nordstrom Seasonal Caps 13 13 0 1168.15 597.13 1 0.0615 0 0.025 0 27.46 0.52

12 2024 1/1/2024 1 Spring Nordstrom Tops & Blouses 1 1 0 1 27.46 14.37 1 0.032 0 19.94 0.57

13 2024 1/1/2024 1 Spring Nordstrom Accessories 2 2 0 2 53.18 32.98 1 0.021 0 26.59 0.6

14 2024 1/1/2024 1 Spring Nordstrom Graphic Tees 4 4 0 3 39.45 23.7 1 0.075 0.015 0 9.8625 0.60

15 2024 1/1/2024 1 Spring Nordstrom Men's Denim 1 1 0 1 57.57 30.05 1 0.029 0 57.57 0.52

16 2024 1/1/2024 1 Spring Nordstrom Seasonal Caps 8 8 0 8 367.6 208.5 1 0.028 0 89.85713131313131 0.5

17 2024 1/1/2024 1 Spring Nordstrom Tops & Blouses 1 1 0 1 28.08 14.99 1 0.011 0 28.08 0.53

18 2024 1/1/2024 1 Spring NuOrder Direct Accessories 2 2 0 2 53.5 33.3 1 0.016 0 26.75 0.62

19 2024 1/1/2024 1 Spring NuOrder Direct Aerie Intimates 2 2 0 2 39.88 22.78 1 0.024 0 19.94 0.57

20 2024 1/1/2024 1 Spring NuOrder Direct Graphic Tees 4 4 0 4 52.16 31.16 1 0.023 0 13.04 0.59

21 2024 1/1/2024 1 Spring NuOrder Direct Men's Denim 1 1 0 1 57.38 29.86 1 0.033 0 57.38 0.5

22 2024 1/1/2024 1 Spring NuOrder Direct Seasonal Caps 8 8 0 8 703.48 356.71 1 0.034 0 70.35 0.59

23 2024 1/1/2024 1 Spring Zappos Accessories 1 1 0 1 26.63 16.53 1 0.02 0 26.63 0.62

24 2024 1/1/2024 2 Spring Amazon Accessories 16 16 0 16 287.97 172.9 1 0.075 0.0325 0 17.998125 0.01

25 2024 1/1/2024 2 Spring Amazon Graphic Tees 9 9 0 9 117 69.75 1 0.026 0 13 0.59

26 2024 1/1/2024 2 Spring Amazon Men's Denim 17 17 0 17 1082.21 544.68 1 0.0625 0 63.65941176 0.50

27 2024 1/1/2024 2 Spring Amazon Outerwear 7 7 0 7 763.54 342.02 1 0.014 0 109.12 0.41

28 2024 1/1/2024 2 Spring Amazon Seasonal Caps 1 1 0 1 64.46 33.74 1 0.037 0 16.16 0.5

29 2024 1/1/2024 2 Spring Amazon Tops & Blouses 2 2 0 2 55.58 29.4 1 0.021 0 27.79 0.52

30 2024 1/1/2024 2 Spring Amazon Women's Denim 5 5 0 4 160.52 81.4 1 0.018 0 32.104 0.59

31 2024 1/1/2024 2 Spring Macy's Accessories 11 11 0 11 193.73 116.47 1 0.0285 0 17.61181818 0.60

32 2024 1/1/2024 2 Spring Macy's Activewear 3 3 0 3 78.72 38.82 1 0.032 0 26.24 0.49

33 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

34 2024 1/1/2024 2 Spring Macy's Graphic Tees 42 42 0 42 894.83 594.43 1 0.0367 0 21.308261619 0.58

35 2024 1/1/2024 2 Spring Macy's Men's Denim 13 13 0 13 242.27 419.4 1 0.01125 0 63.40538462 0.49

36 2024 1/1/2024 2 Spring Macy's Outerwear 5 5 0 5 534.3 233 1 0.034 0 106.86 0.43

37 2024 1/1/2024 2 Spring Macy's Seasonal Caps 12 12 0 11 960.89 478.97 1 0.0845 0 80.07416667 0.49

38 2024 1/1/2024 2 Spring Macy's Tops & Blouses 1 1 0 1 27.34 14.25 1 0.037 0 27.34 0.52

39 2024 1/1/2024 2 Spring Macy's Women's Denim 7 7 0 7 29.59 14.91 1 0.026 0 40.22776060 0.50

40 2024 1/1/2024 2 Spring Nordstrom Accessories 8 8 0 7 123.36 73.81 1 0.0165 0 35.42 0.59

41 2024 1/1/2024 2 Spring Nordstrom Activewear 1 1 0 1 26.08 12.78 1 0.038 0 26.08 0.41

42 2024 1/1/2024 2 Spring Nordstrom Graphic Tees 32 32 0 29 615.78 360.54 1 0.0836666667 0.028 0 19.243125 0.58

43 2024 1/1/2024 2 Spring Nordstrom Loungewear 1 1 0 1 27.81 15.75 1 0.013 0 27.81 0.56

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% Partner

Women's Denim \$1,130,551.49 23,230 19,373 17.27% 55% Office on the web

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 Caps \$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.)

The screenshot shows a Microsoft Power BI dashboard with two tables and a date slicer.

Table 1:

Category	Sum of Lost_Revenue	RevenueShare
Men's Denim	\$326,722.54	17.40%
Women's Denim	\$297,894.16	15.86%
Outerwear	\$241,579.79	12.86%
Aerie Intimates	\$211,333.61	11.25%
Activewear	\$189,356.09	10.08%
Loungewear	\$173,332.13	9.23%
Graphic Tees	\$156,968.46	8.36%
Tops & Blouses	\$154,233.70	8.21%
Accessories	\$85,236.31	4.54%
Seasonal Capsule	\$41,244.69	2.20%
Grand Total	\$1,877,901.48	100.00%

Table 2:

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

Date Slicer:

Jun 2025

MONTHS ▾

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:

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

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:

- Unit Price proxy

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

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

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.

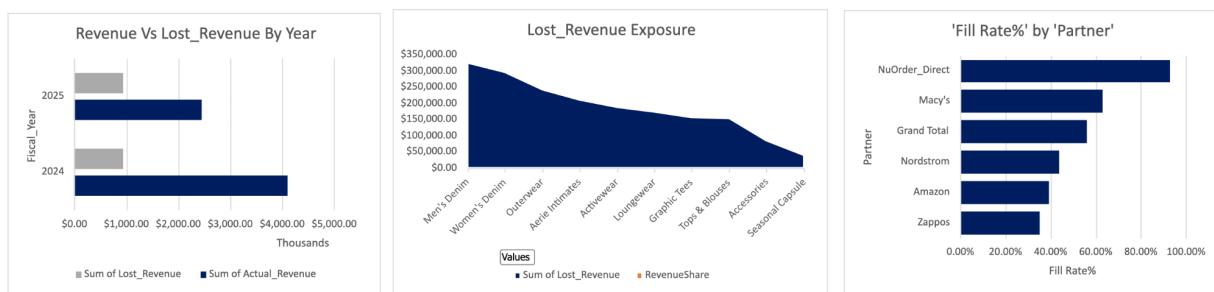
A) KPI tiles (top row)

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 Sales	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	9,000	\$4,500	\$1,562	35%

Dynamic Dashboard with Power Pivot and Chart



Region

Midwest
Northeast
South
Southeast
West

Years (Invoice ...

2022
2023

Last Update Jan 2024

Coca - Cola USA Retailer Dashboard

Figures in USD

Total Sales
\$8,373,616
Units Sold
17,918,760
Avg Price
\$0.44
Operating Profit
\$3,420,987

Sales by Beverage Brand			
Brand	Sales 2022	Sales 2023	Variance
Coca-Cola	294,892	1,734,288	1,439,396
Dasani Water	281,055	1,402,309	1,121,254
Diet Coke	235,912	1,145,765	909,853
Fanta	183,376	781,201	597,825
Powerade	220,368	949,051	728,683
Sprite	206,341	939,058	732,717
Grand Total	1,421,944	6,951,672	5,529,728

Sales by Retailer			
Retailer	Sales 2022	Sales 2023	Variance
Amazon	276,214	845,811	569,597
BevCo	448,933	1,840,257	1,391,324
FizzyCo	161,217	2,097,104	1,935,887
Target	9,252	486,921	477,669
Walmart	339,920	496,927	157,007
West Soda	186,408	1,184,652	998,244
Grand Total	1,421,944	6,951,672	5,529,728

Sales and Operating Profit Margin by Quarter





Region

Midwest
Northeast
South
Southeast
West

Years (Invoice ...

2022
2023

Coca - Cola USA Retailer Dashboard

Figures in USD

Total Sales
\$2,137,538
Units Sold
4,070,000
Avg Price
\$0.50
Operating Profit
\$839,346

Sales by Beverage Brand			
Brand	Sales 2022	Sales 2023	Variance
Coca-Cola	84,858	384,545	299,687
Dasani Wate	76,837	334,150	257,313
Diet Coke	59,943	305,437	245,494
Fanta	48,150	219,270	171,120
Powerade	66,212	252,130	185,918
Sprite	51,427	254,579	203,152
Grand Total	387,427	1,750,111	1,362,684

Sales by Retailer			
Retailer	Sales 2022	Sales 2023	Variance
Amazon	0	133,215	133,215
BevCo	117,390	659,472	542,082
FizzyCo	114,881	589,216	474,335
Walmart	0	299,210	299,210
West Soda	155,156	68,998	-86,158
Grand Total	387,427	1,750,111	1,362,684
	0	0	2,725,368

