

Designing a Sales Dashboard in Excel

Problem Statement:

A company wishes to add user control for product categories for customers to choose a category and view the trend month-by-month and product-by-product. They will use Excel to analyse sales based on product categories and create a sales dashboard that breaks down sales by product category.

Objectives:

- To analyse the sales based on various product categories**
- To enable the users to be able to pick a product category and see trends month-by-month and product-by-product**

Prerequisites:

- Creating charts and graphs in excel**
- Analyzing data in excel**
- Formatting data in excel**

Industry Relevance:

- **Creating charts and graphs in excel:** It is used to help express complex data in a simple format.
- **Analyzing data in excel:** It helps gain insights into the data through high-level visual summaries, trends, and patterns.
- **Formatting data in excel:** It helps to make data look more interesting and descriptive.

Dataset Description:

Variable - Description

- **Order ID - Unique order ID of a product**
- **Gender**
- **Order Date - Order placement date**
- **Ship Date - Shipment date of the placed order**
- **Aging - Used to create histogram bin**
- **Ship Mode - Shipment mode of placed order**
- **Product Category - Product category**
- **Product - Name of the product**
- **Sales - Sales amount**
- **Quantity - The amount or number of a material**
- **Discount - A deduction from the usual cost of something**
- **Profit - A financial advantage or benefit**
- **Shipping Cost - The amount required to ship the placed order**
- **Order Priority - Precedence of placed order**
- **Customer ID - Unique customer ID**
- **Customer Name - Name of the customer**
- **City - Unique city name**
- **State - Unique state name**
- **Country - Unique country name**
- **Region - Especially the part of a country**
- **Months - The month of placing the order**

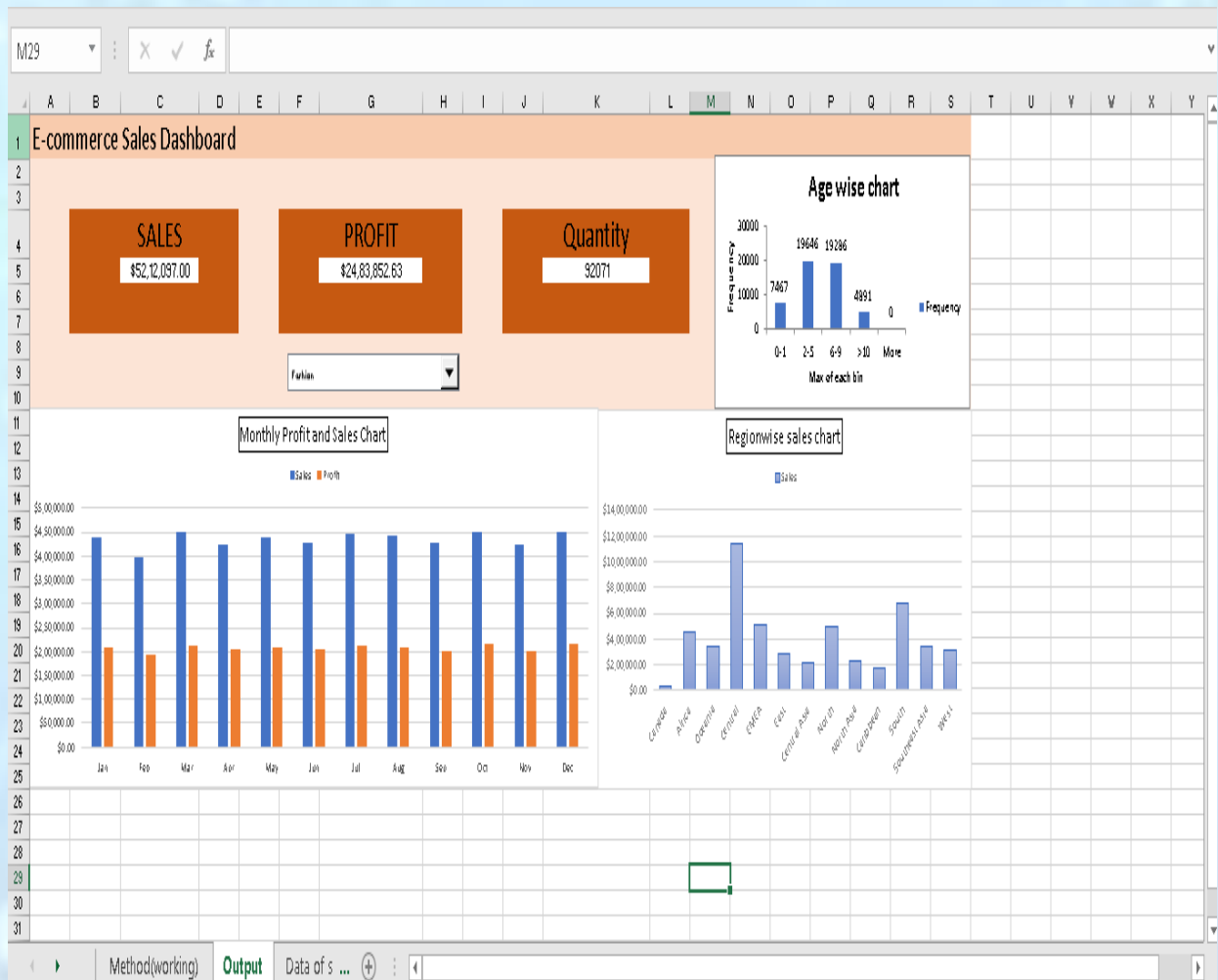
Tasks to Perform:

Method(working):

Clipboard		Font		Alignment		Number		Styles		Cells		Editing				
J20																
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Month	Sales	Profit		Region	Sales		List of Product Categories	3							
2	Jan	\$4,39,830.00	\$2,07,754.84		Canada	\$33,606.00		Electronic	Fashion							
3	Feb	\$3,97,420.00	\$1,91,681.26		Africa	\$4,49,838.00		Auto & Accessories								
4	Mar	\$4,48,584.00	\$2,12,583.27		Oceania	\$3,47,144.00		Fashion					Bin	Frequency		
5	Apr	\$4,22,996.00	\$2,03,108.44		Central	\$11,46,920.00		Home & Furniture					0-1	7467		
6	May	\$4,39,549.00	\$2,09,885.79		EMEA	\$5,11,418.00							2-5	19646		
7	Jun	\$4,26,494.00	\$2,03,840.69		East	\$2,81,855.00							6-9	19286		
8	Jul	\$4,44,723.00	\$2,11,222.97		Central Asia	\$2,17,590.00							>10	4891		
9	Aug	\$4,41,103.00	\$2,10,086.00		North	\$4,92,785.00							More	0		
10	Sep	\$4,25,863.00	\$2,00,984.58		North Asia	\$2,35,414.00										
11	Oct	\$4,50,840.00	\$2,15,612.47		Caribbean	\$1,68,146.00										
12	Nov	\$4,22,629.00	\$2,00,632.06		South	\$6,72,013.00										
13	Dec	\$4,52,066.00	\$2,16,460.25		Southeast Asia	\$3,37,010.00										
14					West	\$3,18,358.00										
15																
16																
17					bins	max of each bins										
18					0-1	1										
19					2-5	5										
20					6-9	9										
21					>10	10										
22																
23																
24																
25																

Method(working) Output Data of s ...

Dash Board :



Dataset example:

C16	21-10-2015														
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Order ID	Order Date	Ship Date	Aging	Ship Mod	Product Category	Product	Sales	Quantity	Discount	Profit	Shipping	Order Pric	Customer	Customer Name
2	AU-2015-1	09-11-2015	17-11-2015	8	First Class	Auto & Accessories	Car Media Players	\$ 140.0	2	0.05	\$ 46.0	\$ 4.6	Medium	LS-001	Lane Daniels
3	AU-2015-2	30-06-2015	02-07-2015	2	First Class	Auto & Accessories	Car Speakers	\$ 211.0	3	0.03	\$ 112.0	\$ 11.2	Medium	IZ-002	Alvarado Kriz
4	AU-2015-3	05-12-2015	13-12-2015	8	First Class	Auto & Accessories	Car Body Covers	\$ 117.0	5	0.01	\$ 31.2	\$ 3.1	Critical	EN-003	Moon Weien
5	AU-2015-4	09-05-2015	16-05-2015	7	First Class	Auto & Accessories	Car & Bike Care	\$ 118.0	2	0.05	\$ 26.2	\$ 2.6	High	AN-004	Sanchez Bergman
6	AU-2015-5	09-07-2015	18-07-2015	9	First Class	Auto & Accessories	Tyre	\$ 250.0	1	0.04	\$ 160.0	\$ 16.0	Critical	ON-005	Rowe Jackson
7	AU-2015-6	25-02-2015	05-03-2015	8	First Class	Auto & Accessories	Bike Tyres	\$ 72.0	3	0.04	\$ 24.0	\$ 2.4	Critical	TO-006	Carter Barreto
8	AU-2015-7	09-04-2015	10-04-2015	1	First Class	Auto & Accessories	Car Mat	\$ 54.0	1	0.05	\$ 54.0	\$ 5.4	High	OM-007	Mcconnell Tom
9	AU-2015-8	30-03-2015	06-04-2015	7	First Class	Auto & Accessories	Car Seat Covers	\$ 114.0	5	0.02	\$ 22.6	\$ 2.3	Critical	AN-008	Dennis Holloman
10	AU-2015-9	09-02-2015	16-02-2015	7	First Class	Auto & Accessories	Car Pillow & Neck Rest	\$ 231.0	5	0.03	\$ 116.4	\$ 11.6	Critical	EN-009	Wall Olsen
11	AU-2015-10	21-04-2015	01-05-2015	10	First Class	Auto & Accessories	Car Media Players	\$ 140.0	2	0.02	\$ 54.4	\$ 5.4	Critical	TT-0010	Shepard Witt
12	AU-2015-11	16-11-2015	26-11-2015	10	First Class	Auto & Accessories	Car Speakers	\$ 211.0	4	0.01	\$ 122.6	\$ 12.3	Critical	ED-0011	Johns Reed
13	AU-2015-12	01-09-2015	02-09-2015	1	First Class	Auto & Accessories	Car Body Covers	\$ 117.0	4	0.04	\$ 18.3	\$ 1.8	High	ON-0012	Doyle Knutson
14	AU-2015-13	09-07-2015	16-07-2015	7	First Class	Auto & Accessories	Car & Bike Care	\$ 118.0	1	0.02	\$ 35.6	\$ 3.6	Critical	WN-0013	Butler Brown
15	AU-2015-14	22-07-2015	27-07-2015	5	First Class	Auto & Accessories	Tyre	\$ 250.0	3	0.04	\$ 140.0	\$ 14.0	High	AN-0014	Johnson Abelman
16	AU-2015-15	12-10-2015	21-10-2015	9	First Class	Auto & Accessories	Bike Tyres	\$ 72.0	4	0.01	\$ 18.0	\$ 1.8	Medium	EY-0015	Greene Decherney
17	AU-2015-16	23-02-2015	05-03-2015	10	First Class	Auto & Accessories	Car Mat	\$ 54.0	2	0.01	\$ 27.0	\$ 2.7	Critical	RN-0016	Bentley Zypem
18	AU-2015-17	04-05-2015	08-05-2015	4	First Class	Auto & Accessories	Car Seat Covers	\$ 114.0	2	0.05	\$ 22.6	\$ 2.3	High	CK-0017	Rivera Black
19	AU-2015-18	12-06-2015	19-06-2015	7	First Class	Auto & Accessories	Car Pillow & Neck Rest	\$ 231.0	5	0.05	\$ 93.3	\$ 9.3	High	RE-0018	Wong Macintyre
20	AU-2015-19	13-05-2015	20-05-2015	7	First Class	Auto & Accessories	Car Media Players	\$ 140.0	2	0.05	\$ 46.0	\$ 4.6	Critical	ON-0019	Hendricks Wilson
21	AU-2015-20	27-07-2015	02-08-2015	6	First Class	Auto & Accessories	Car Speakers	\$ 211.0	2	0.02	\$ 122.6	\$ 12.3	Critical	ED-0020	Johns Reed
22	AU-2015-21	09-12-2015	13-12-2015	4	First Class	Auto & Accessories	Car Body Covers	\$ 117.0	5	0.01	\$ 31.2	\$ 3.1	Critical	AM-0021	Barr Sundaresam
23	AU-2015-22	09-02-2015	16-02-2015	7	First Class	Auto & Accessories	Car & Bike Care	\$ 118.0	2	0.03	\$ 20.8	\$ 2.1	High	KE-0022	Holt Gladys

Project Outcome:

- The aim of the project is to analyze the sales based on various product categories.
 - The users should be able to pick a product category and can see trends month by-month and product-by-product.
- Project Outcome.**

The background of the image is a light blue gradient. Overlaid on this is a complex network of thin white lines that connect various small white dots, creating a web-like or circuit-like pattern. In the center of the image, there is a glowing yellow lightbulb with a visible filament, emitting a soft, warm light that illuminates the surrounding area.

THANK YOU

