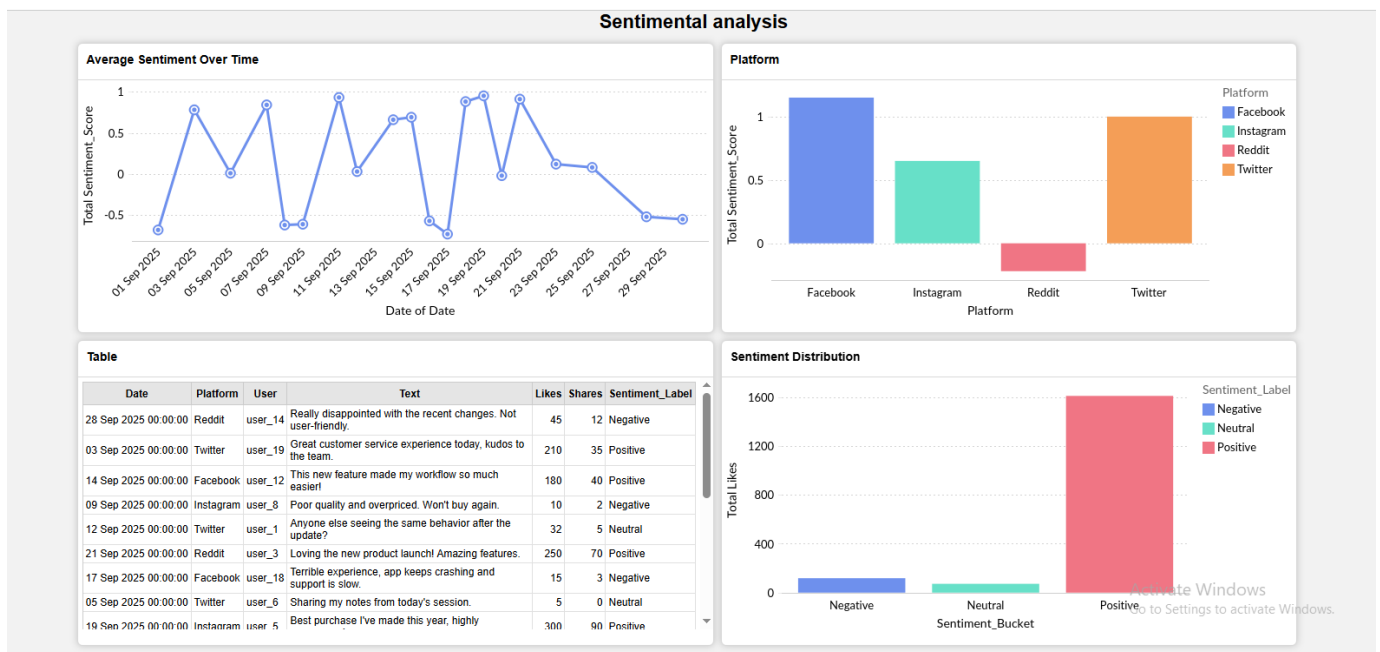




**CODEBOOSTERS
TECH**

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ZOHO ANALYTICS : Beginner To Advanced



Zoho Analytics E-Commerce Analysis Guide

Quick Glossary

Term	Definition
Workspace	Where your project lives (think: folder)
Table	A sheet/table of data (Customers, Orders...)

Term	Definition
Lookup Column	A link from one table to another (like a foreign key)
Report	An analysis object - Chart, Pivot, Summary, or Tabular
Dashboard	A canvas that holds many reports (your control panel)
Query Table	SQL-style view for grouping/custom joins

Final Deliverables

- **Linked data model** (all 5 tables connected)
- **Key KPIs:** Conversion Rate, Abandoned Cart Rate, AOV, Repeat Purchase Rate, CLV
- **Reports:** Abandoned-cart trend, AOV by channel, CLV by country, Order details
- **Dashboard** with filters (Date, Channel, Country)

Step-by-Step Implementation

Step A — Open Zoho & Workspace

1. Go to analytics.zoho.com and sign in
2. Choose/create workspace: **Create** → **New Workspace** → "E-Commerce Sales Analysis"

Step B — Import Data

- **Import Your Data** → **Local File** → **Select Excel workbook**
- Zoho will detect all 5 sheets automatically

Step C — Create Lookup Columns

1. Click table (e.g., Orders) → **More (:)** → **Edit Design**
2. Tab: **Lookups** → **Get Suggestions** (accept proposals)
3. **Manual setup if needed:**
 - Orders → Carts: cart_lookup → Carts → cart_id (Many → One)
 - Carts → Sessions: session_lookup → Sessions → session_id
 - Sessions → Customers: customer_lookup → Customers → customer_id
 - Orders → Customers: customer_lookup → Customers → customer_id
 - Order_Items → Orders: order_lookup → Orders → order_id
4. **Save and Close**

Step D — Pull Lookup Fields

- Open Orders table → **Add Column** → **Lookup Column**
- Choose lookup (e.g., cart_lookup) → Pick field (e.g., total_cart_value)
- **Repeat** for other needed fields

KPI Formulas (Copy/Paste)

Conversion Rate (%)

zoho

```
(countdistinct("Orders"."order_id") / countdistinct("Sessions"."session_id")) * 100
```

Abandoned Cart Rate (%)

zoho

```
(countif("Carts"."cart_status"='Abandoned') / countdistinct("Carts"."cart_id")) * 100
```

Average Order Value (AOV)

zoho

```
sum("Orders"."order_value") / countdistinct("Orders"."order_id")
```

Repeat Purchase Rate (%)

Query Table SQL:

sql

```
SELECT customer_id, COUNT(order_id) AS order_count, SUM(order_value) AS total_revenue
FROM Orders
GROUP BY customer_id;
```

Then add column:

zoho

```
if(order_count > 1, 1, 0) -- name: RepeatCustomerFlag
```

Aggregate:

zoho

```
(sum("RepeatCustomerFlag") / countdistinct("customer_id")) * 100
```

Customer Lifetime Value (CLV)

zoho

```
total_revenue / order_count
```

Report Creation

1) Abandoned Cart Trend (Line Chart)

- **Create** → **Chart** → **Next**
- **Table:** Carts
- **Type:** Line Chart
- **X-axis:** `cart_created_at` (by Month)
- **Y-axis:** `cart_id` → Count
- **Filter:** `cart_status` = Abandoned
- **Save:** "Abandoned Cart Trend"

2) AOV by Channel (Pivot)

- **Create** → **Pivot** → **Orders**
- **Rows:** `customer_lookup.channel`
- **Values:** `order_value` → Average
- **Save:** "AOV by Channel"

3) CLV by Country (Bar Chart)

- **Create** → **Chart** → **Bar**
- **Table:** Customer Query Table
- **X-axis:** `country`
- **Y-axis:** `avg(Customer_CLV)`
- **Save:** "CLV by Country"

4) Order Details Table (Tabular)

- **Create** → **Tabular** → **Orders**
- **Columns:**
 - `order_id` , `order_date`
 - `customer_lookup.customer_name`
 - `customer_lookup.channel`

- `cart_lookup.total_cart_value`
- `order_value` , `payment_method` , `status`
- **Save:** "Order Details Table"

Dashboard Setup

Build Dashboard

1. **Dashboards** → **Create Dashboard** → "E-Commerce Performance"
2. **Add widgets** using saved reports:
 - **Top row:** KPI widgets (Conversion Rate, Abandoned Cart Rate, AOV, Avg CLV)
 - **Middle:** Abandoned Cart Trend + AOV by Channel
 - **Bottom:** CLV by Country + Order Details Table

Add Filters

- Date range (`order_date` / `cart_created_at`)
- Channel (`customer_lookup.channel`)
- Country (`customer_lookup.country`)

Testing & Validation

Quick Checks

- Apply **1-month date filter** - verify logical number changes
- Test **single Channel filter** - confirm AOV by channel updates
- Check **Order Details** - `cart_lookup.total_cart_value` should match `Orders.order_value` for "Purchased" status

Troubleshooting

Issue	Solution
Blank lookup values	Check matching IDs (trim spaces, case sensitivity)
Duplicates in lookup keys	Ensure lookup table has unique keys
Zoho suggestions	Usually correct - accept them
Data updates	Use "Replace Data" for table updates
Free tier limits	Manual refreshes only

Quick Checklist

- Workspace created
- Excel file imported (5 sheets)
- Lookups created (Edit Design → Lookups → Get Suggestions)
- Lookup field verified in Orders (`cart_lookup.total_cart_value`)
- KPI formulas created
- 4 reports built (line, pivot, bar, tabular)
- Dashboard created with filters
- Filters tested and blank lookups checked

Formula Recap

Conversion Rate:

zoho

```
(countdistinct("Orders"."order_id") / countdistinct("Sessions"."session_id")) * 100
```