


Professional Global Sales Dashboard Steps

Section-1- Organizing the Raw data for dashboard

Step-1 Convert Raw Data into table format.

- ❖ Rename the Table (Very Important) "SalesData"

Step-2 Create Pivot tables

1.  Pivot 1 – Monthly Revenue Trend "Pivot_Monthly"
 - a. Drag fields
 - i. Rows → Month
 - ii. Values → Revenue
2. Pivot-3_ → Revenues by Geography "Pivot_Country"
 - a. Drag fields
 - i. Rows → Country
 - ii. Values → Revenue
3. Pivot-3_Customers "Pivot_Customers"
 - a. Drag fields
 - i. Rows → Customer ID
 - ii. Values → Customer ID
4. Pivot-4_Category "Pivot_Category"
 - a. Drag fields
 - i. Rows → Category
 - ii. Values → Revenue
5. Pivot_5 SalesRep "Pivot_SalesRep"
 - a. Drag fields
 - i. Rows → Sales Rep
 - ii. Values → Revenue

Section-2- Prepare Dashboard Sheet

Step-1 Create a new sheet and rename **KPI_Helper**

1. In cell **A2**, type: Total Revenue and In cell **B2**, type this formula:
=GETPIVOTDATA("Revenue",Pivot_Monthly!A3)
2. In cell **A3**, type: New Customers In cell **B3**, type: =GETPIVOTDATA("Customer ID",Pivot_Customers!A3)
3. In cell **A4**, type: Avg Deal Size In cell **B4**, type: =B2/B3
4. In cell **A5**, type: Sales Growth %
=(GETPIVOTDATA("Revenue",Pivot_Monthly!A3,"Month","Dec")-GETPIVOTDATA("Revenue",Pivot_Monthly!A3,"Month","Nov"))

`/GETPIVOTDATA("Revenue",Pivot_Monthly!A3,"Month","Nov")`

Step-2 Create another sheet and rename with "Dashboard".

Step-3 **Remove** Gridlines.

Step-4 Set column layout (IMPORTANT)

Columns Width

A	2
B to J	18
K	2
L to T	18 (Optional)

Step-5 Set Row layout.

1. Select rows **1 to 36**
2. Right-click → **Row Height**
3. Set to: **22**

Step-6 Lock the Sheet (Optional but Pro)

- 1) To avoid accidental clicks later:
 - a) Select all cells (Ctrl + A).
 - b) Right-click → Format Cells.
 - c) Protection → Tick Locked.
 - d) Review → Protect Sheet (Optional or after Dashboard)

Step-7 Create Dark Background

1. Insert background rectangle
 - a. Insert → Shapes → Rectangle
 - b. Cover area: B2 : L34 (As per the requirements)
1. Format Shape
 - Fill color → Gradient fill
 - Gradient Type- Linear
 - Angle - 90°
 - Gradient Stops

Stop Color Transparency

- 1 RGB(15, 23, 42) 0%
- 2 RGB(30, 41, 59) 0%
- 3 RGB(51, 65, 85) 0%

This creates the **cinematic dark look**

- Outline → No outline

Right-click → Send to Back

Important

1. Right-click → **Size and Properties**
2. Properties → Select:

- **Don't move or size with cells**

This prevents accidental movement.

Section-3 Dashboard Preparation

Setp-1 Add the Dashboard Title in our case **"GLOBAL SALES DASHBOARD"**

- **Go to Insert → Text Box**
- **Draw a text box at the top center (Row 2–3 area)**
- **Type: GLOBAL SALES DASHBOARD**

- **Format the Header Text**

❖ Property	Value
❖ Font	Segoe UI
❖ Size	20
❖ Bold	<input checked="" type="checkbox"/>
❖ Text Color	RGB(226, 232, 240)
❖ Alignment	Center

Add Icon Optional

- ❖ Go to Insert → Icons
- ❖ Search for: globe
- ❖ Insert icon
- ❖ Place it left of the title
- ❖ Fill with RGB(56, 189, 248)
- ❖ Shape Format → Group

Setp-2 Create a KPI Cards (Top Row)

- ◇ **KPI Card Shape**

1. Insert → Shapes → **Rounded Rectangle**
2. Size: approx **B3:D6**

◇ **Card Fill Color**

- ❖ **Fill:** RGB(30, 41, 59)
- ❖ **Outline:** No outline
- ❖ **Corner radius:** Medium
- ❖ **Color:** Black
- ❖ **Transparency:** 65%
- ❖ **Blur:** 14 pt
- ❖ **Distance:** 4 pt
- ❖ **Angle:** 270°

◇ **KPI Text (Inside Card)**

TOTAL REVENUE

Title Text

- **Font:** Segoe UI
- **Size:** 11
- **Color:** RGB(203, 213, 225)

◇ **Link KPI to Pivot**

1. Click KPI number text box
2. Formula bar → type: =KPI_Helper!B2

Format KPI Value:

- **Font size:** 28
- **Bold:**
- **Color:** RGB(56, 189, 248)

Repeat for:

- Sales Growth RGB(203, 213, 225)
- New Customers RGB(192, 132, 252)
- Avg Deal Size Orange → RGB(251, 146, 60))

Step-3 Add Charts from PivotTables

RULE (Very Important)

- Never create charts manually
- Always insert charts from PivotTables

❖ MONTHLY REVENUE TREND

1 Create chart

- Go to Pivot_Monthly
 - Click inside pivot
 - Insert → Line Chart (Choose Line with Markers)
-

2 Move to Dashboard

- Select chart → Ctrl + X
- Go to Dashboard → Ctrl + V

Place it under KPI cards.

3 Style the chart

- Chart area fill → RGB(30, 41, 59)
- Line color → RGB(56, 189, 248)
- Gridlines → Remove
- Axis text → RGB(203, 213, 225) (Not required)
- Chart title → Monthly Revenue Trend

Format:

- ❖ Font: Segoe UI Semibold
- ❖ Size: 12
- ❖ Color: RGB(203, 213, 225)

SALES BY COUNTRY

Go to **Pivot_Country** sheet.

You must have:

- **Rows** → Country
- **Values** → Sum of Revenue
- Sorted **Largest to Smallest**

☞ If not sorted:

- Right-click any value
- Sort → **Largest to Smallest**

Say "OK" mentally and continue.

- ❖ Click anywhere inside **Pivot_Country**.
- ❖ Insert → **PivotChart**
- ❖ Choose: **Bar Chart ,Clustered Bar**
- ❖ Click **OK**

Move Chart to Dashboard

- ❖ Select the chart
- ❖ **Ctrl + X** (Cut)
- ❖ Go to **Dashboard**
- ❖ **Ctrl + V** (Paste)
- ❖ Place it **to the RIGHT** of **Monthly Revenue**

Remove Chart Junk

Click the chart → click green "+"

- ❖ **UNCHECK:**
 - Chart Title
 - Legend
 - Gridlines
 - Clean = premium.

Chart Background (MATCH STYLE)

Chart Area

Right-click → **Format Chart Area:**

- ❖ Fill → Solid RGB (51, 65, 85)
- ❖ Border → No line

Plot Area

Right-click inside bars → **Format Plot Area:**

- ❖ Fill → Solid RGB(30, 41, 59)
- ❖ Border → No line

Axis Formatting

Country names (Left axis)

- ✓ Font size: 9
- ✓ Color: RGB(203, 213, 225)

Revenue axis (Bottom)

- ✓ Number format: £#,##0
- ✓ Font size: 9
- ✓ Color: RGB(148, 163, 184)

Add Section Title

- ✓ Insert → Text Box
- ✓ Place above chart Sales By Country

Format:

- ✓ Font: Segoe UI Semibold
- ✓ Size: 12
- ✓ Color: RGB(203, 213, 225)

TOP 10 SALES REPRESENTATIVES

Go to **Pivot_SalesRep** sheet.

You must have:

- **Rows** → Sales Rep
- **Values** → Sum of Revenue

Now do this carefully:

Apply Top 10 filter

1. Click **Row Labels** ▼
2. Value Filters → **Top 10...**
3. Set:
 - i. Top → **10**
 - ii. By → **Sum of Revenue**

4. Click **OK**

✓ You should now see **only 10 sales reps**.

Create Pivot Chart

- 1) Click inside **Pivot_SalesRep**
- 2) Insert → **PivotChart**
- 3) Choose:
 - a) Bar Chart
 - b) Clustered Bar
- 4) Click **OK**

Move Chart to Dashboard

- 1) Select the chart
- 2) **Ctrl + X** (Cut)
- 3) Go to **Dashboard**
- 4) **Ctrl + V** (Paste)
- 5) Place it **below Monthly Revenue**, aligned left or centre bottom

Clean the Chart

Click the chart → green + button

- 1) **UNCHECK**:
 - a) Chart Title
 - b) Legend
 - c) Gridlines

Chart Background

- 1) Chart Area- Solid fill- RGB(51, 65, 85)-- Border → No line
- 2) Plot Area- Solid fill- RGB(30, 41, 59) -- Border → No line
- 3) Bar Styling
 - a) Click any bar → Format Data Series
 - b) Fill → Solid RGB(56, 189, 248)
 - c) Gap Width → **55-60%**
 - d) Border → No line

Axis Formatting

- 1) Sales Rep names (left axis)
 - a) Font size: **9**
 - b) Color RGB(203, 213, 225)
- 2) Revenue axis (bottom)
 - a) Number format **£#,##0**

- b) *Font size: 9*
- c) *Color RGB(148, 163, 184)*

Add Section Title

- i) *Insert → Text Box*
- ii) *Place above the chart “Top 10 Sales Representatives”*

2) *Format:*

- 1) *Font: Segoe UI*
- 2) *Size: 12*
- 3) *Color RGB(203, 213, 225)*

 *Dashboard is COMPLETE*

Excel Tricks