



# WIN with Visualisation

## “Dashboards on Excel”



BY CA VINEET JAIN, LONDON

# Use of Dashboards in Presentations

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In today's data-driven environment, being able to convert large datasets into meaningful visual dashboards is a key skill. Dashboards bring clarity to chaos—they help us identify trends, spot outliers, and make quicker, data-backed decisions. In this small presentation, we will be able to see through a simple three-step process where we'll take raw data, summarize it using pivot tables, and build visually engaging charts and indicators. Whether you are in finance, marketing, HR, or operations, this technique is universally useful.

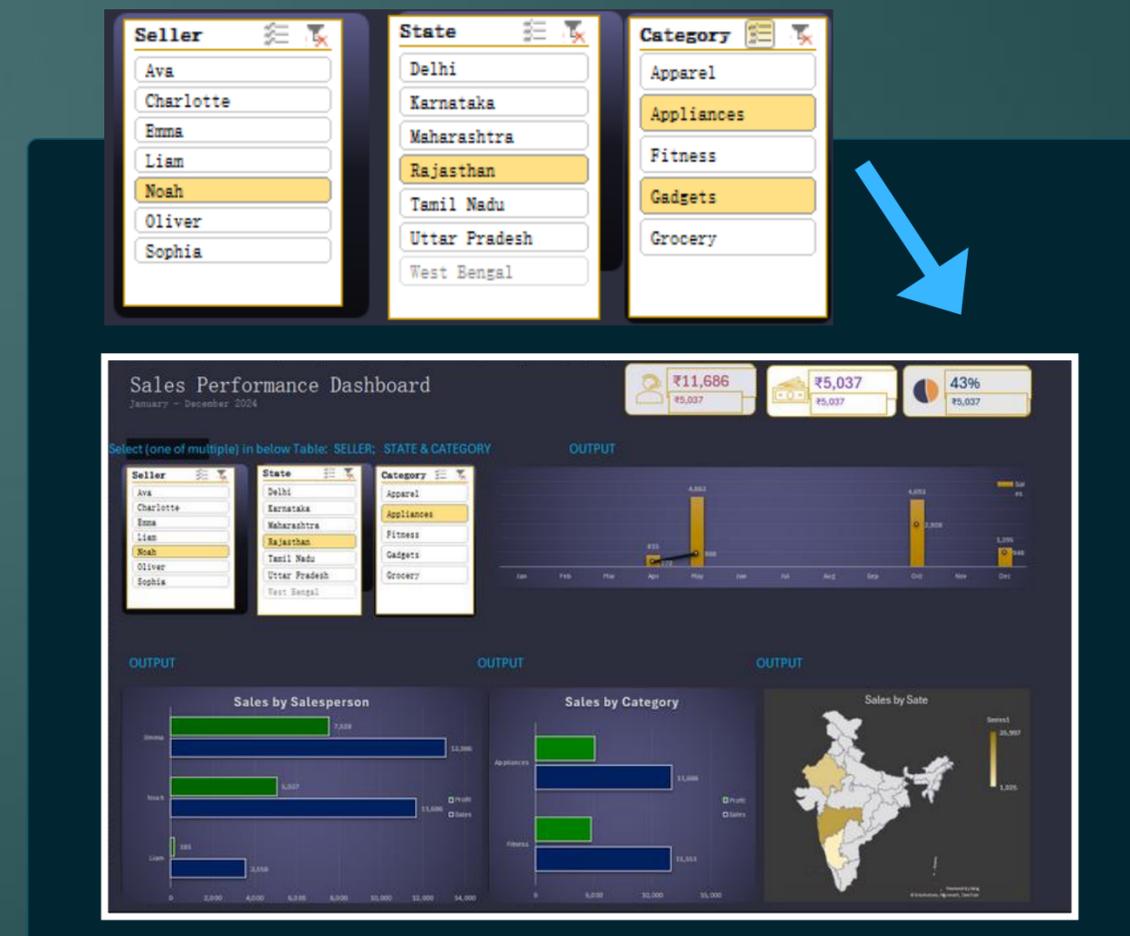
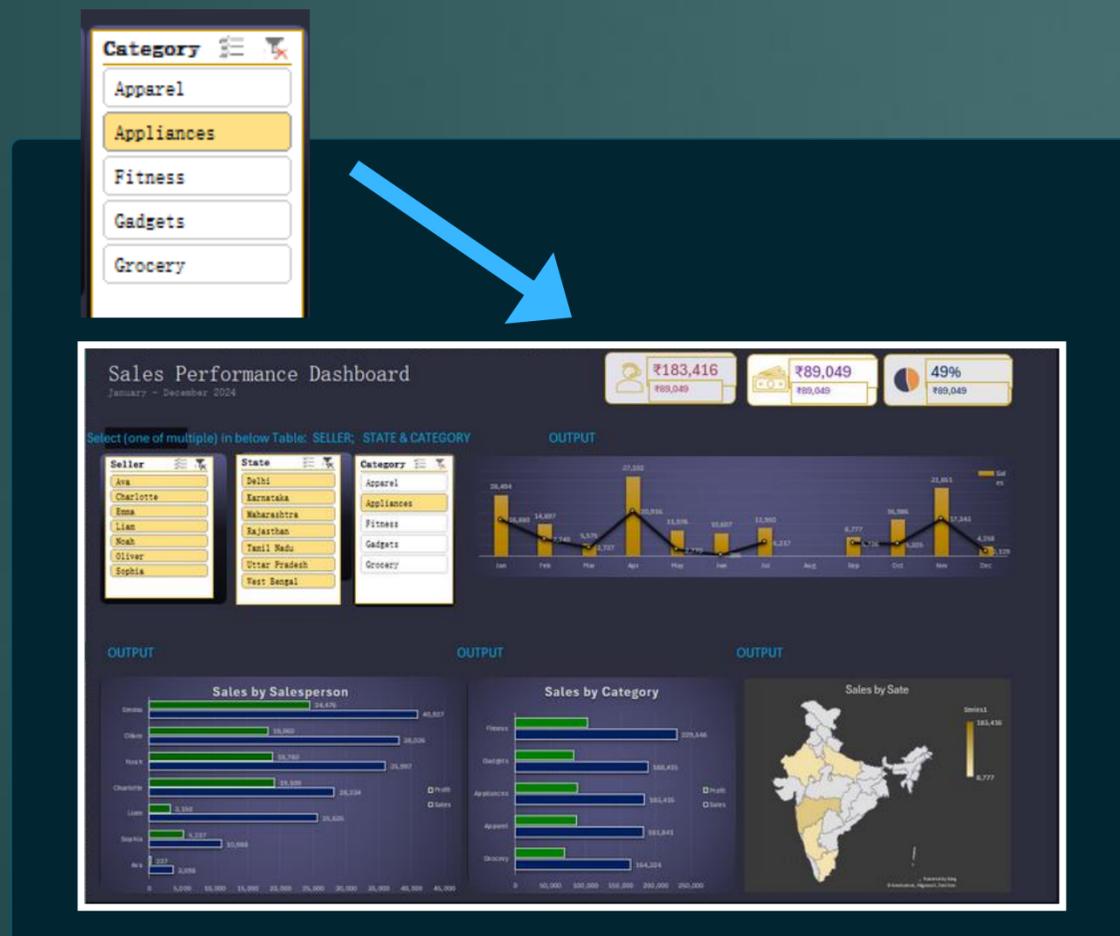
Benefits:

- **Empowers decision-making through visuals**
- **Saves time through automation and summarization**
- **Makes data insights accessible to non-technical users**

# Different Selection Outputs in Dynamic Dashboard (1/2)

Select any Category, Seller or State of your Choice

- Selections (e.g., Seller, State, Category) dynamically update the dashboard, reflecting changes instantly across all charts and tables via live data connection.
- You can choose either a single or Multiple Slicer Fields



# Different Selection Outputs in Dynamic Dashboard (2/2)

## *Decision-making through visuals*

- Use dynamic dashboards with simple MS Excel conditional formatting to instantly highlight performance metrics like Sales and Profit.
- Visual cues highlight trends, top performers, and outliers, enabling faster and smarter decisions.

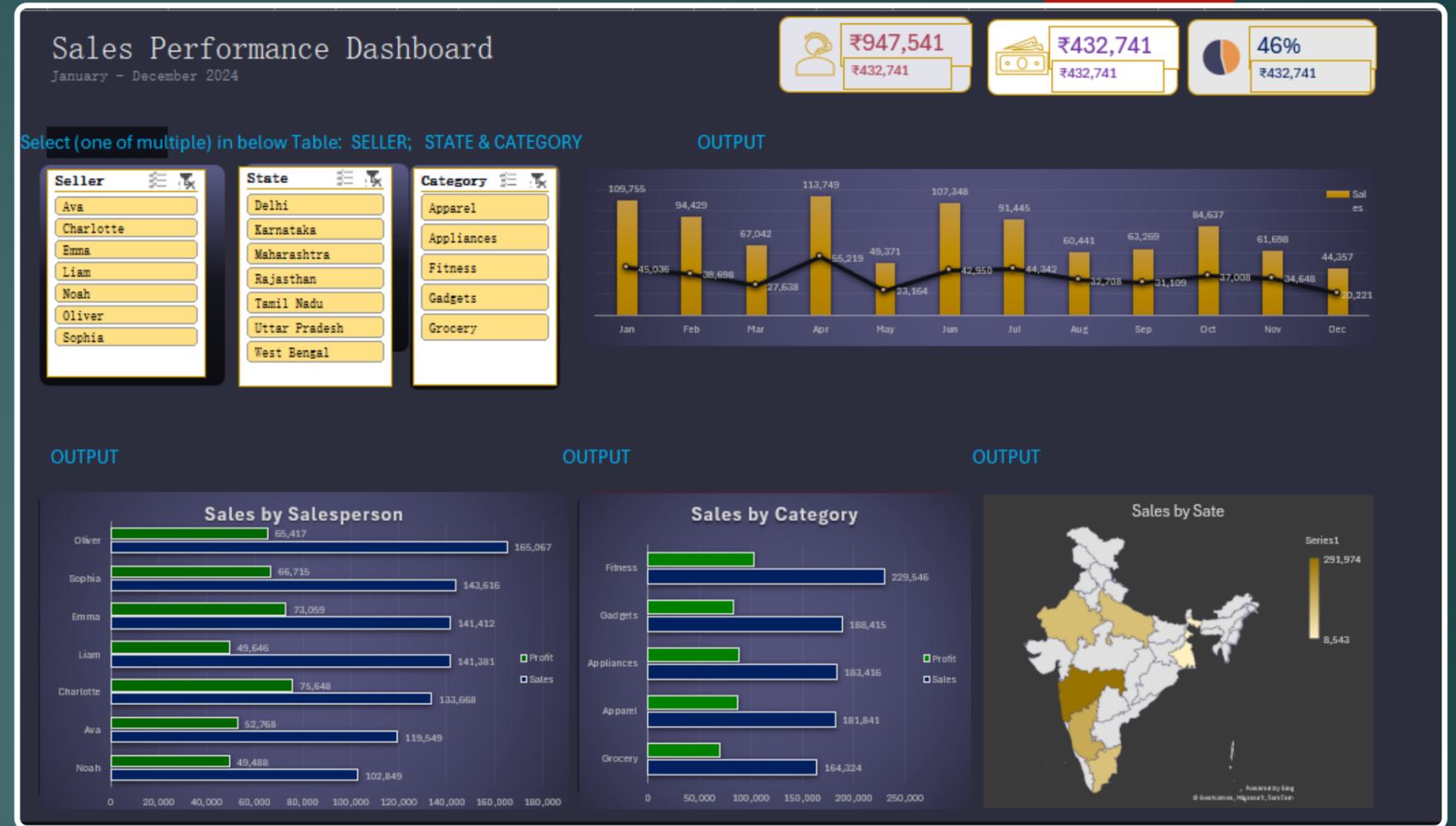
Seller	Sales	Profit
Noah	102,849	49,488
Ava	119,549	52,768
Charlotte	133,668	75,648
Liam	141,381	49,646
Emma	141,412	73,059
Sophia	143,616	66,715
Oliver	165,067	65,417
<b>Grand Total</b>	<b>947,541</b>	<b>432,741</b>

- Using visual, it is easy to find that Oliver has the highest Sales, however maximum Profit is by Charlotte

# Steps to Build it

# Turn Datasets Into Visual Dashboards

Month	Seller	Category	Product	State	Sales	Profit	Profit %
May	Liam	Gadgets	Tablet	Maharashtra	1987.32	1245.71	62.68%
Nov	Noah	Apparel	Chinos	Uttar Pradesh	8124.56	6421.89	79.04%
Jun	Ava	Fitness	Resistance Bands	Karnataka	8923.47	4732.15	53.03%
Dec	Liam	Grocery	Granola Bars	Tamil Nadu	3124.59	382.47	12.24%
Feb	Liam	Apparel	Parka	West Bengal	8543.21	2765.89	32.38%
Mar	Oliver	Grocery	Smoothie	Maharashtra	2284.63	118.92	5.21%
Feb	Emma	Fitness	Exercise Bike	Delhi	5876.34	689.45	11.73%
Nov	Liam	Appliances	Air Fryer	Uttar Pradesh	2654.87	612.39	23.07%
Jan	Liam	Gadgets	Tablet	Tamil Nadu	2987.65	1024.73	34.30%
Jul	Sophia	Fitness	Exercise Bike	Maharashtra	9789.32	6289.45	64.25%
Apr	Noah	Appliances	Blender	Maharashtra	6578.41	3956.28	60.14%
Aug	Oliver	Fitness	Kettlebells	Karnataka	1562.84	1225.16	78.39%
May	Noah	Appliances	Blender	Karnataka	1024.68	11.87	1.16%
Jul	Liam	Apparel	Polo Shirt	Uttar Pradesh	6187.59	2632.84	42.55%
May	Liam	Appliances	Food Processor	Tamil Nadu	1145.28	972.46	84.91%
Jan	Noah	Fitness	Kettlebells	Maharashtra	3218.47	552.96	17.18%
Jan	Oliver	Grocery	Herbal Tea	Maharashtra	8145.27	802.64	9.85%
Jan	Oliver	Apparel	Cardigan	Delhi	438.92	308.72	70.34%
May	Sophia	Fitness	Kettlebells	Tamil Nadu	3512.48	3142.75	89.47%
Apr	Noah	Gadgets	Earbuds	Maharashtra	1108.95	858.39	77.41%



## Objective

A 3 Step Tutorial to turn your Datasets into Visual Dashboards, using Pivot Tables, Charts and Slicers.

# Overview: Building an Interactive Excel Dashboard

*Transform raw data into meaningful insights using Pivot Tables, Charts, and Slicers in Excel.*

## **Step 1: Insert Pivot Tables**

*Summarize your dataset by dragging fields into Rows, Columns, Values, and Filters.*

## **Step 2: Create Charts from Pivot Tables**

*Convert your pivot summaries into visual charts for quick trend analysis.*

## **Step 3: Insert Slicers**

*Add interactive slicers to filter data instantly and view dynamic outputs across charts and tables.*

# Step 1: Insert Pivot Tables

A **Pivot Table** is a tool that summarizes, organizes, and analyzes large datasets dynamically.

*Use Case: Use Pivot Tables to quickly calculate total sales by region, seller, or product category from raw data.*

Month	Seller	Category	Product	State	Sales	Profit	Profi
May	Liam	Gadgets	Tablet	Maharashtra	1987.32	1245.71	62.68%
Nov	Noah	Apparel	Chinos	Uttar Pradesh	8124.56	6421.89	79.04%
Jun	Ava	Fitness	Resistance Bands	Karnataka	8923.47	4732.15	53.03%
Dec	Liam	Grocery	Granola Bars	Tamil Nadu	3124.59	382.47	12.24%
Feb	Liam	Apparel	Parka	West Bengal	8543.21	2765.89	32.38%
Mar	Oliver	Grocery	Smoothie	Maharashtra	2284.63	118.92	5.21%
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Jan	Liam	Gadgets	Tablet	Tamil Nadu	2987.65	1024.73	34.30%
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Jul	Liam	Apparel	Polo Shirt	Uttar Pradesh	6187.59	2632.84	42.55%
May	Liam	Appliances	Food Processor	Tamil Nadu	1145.28	972.46	84.91%
Jan	Noah	Fitness	Kettlebells	Maharashtra	3218.47	552.96	17.18%
Jan	Oliver	Grocery	Herbal Tea	Maharashtra	8145.27	809.64	9.85%

## Procedure

### 1. Prepare Dataset

Ensure data is clean, complete, and includes proper headers.

### 2. Insert Pivot Table

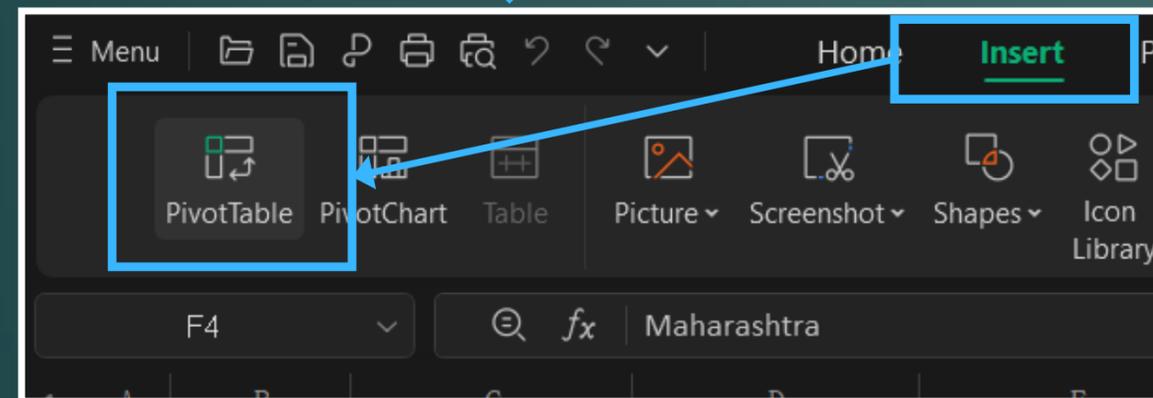
Go to the Insert tab, select PivotTable, and choose where to place it.

### 3. Configure Fields

Drag relevant fields into Rows, Columns, Values, and Filters to organize data.

### 4. Format & Analyze

Apply number formats, sort results, and extract key insights easily.



Sum of Sales	Sum of Profit	Margin	Seller	Sales	Profit	Category	Sales	Profit	State	Sales by State
947,541	432,741		Noah	102,849	49,488	Grocery	164,324	70,450	Maharashtra	291,974
₹947,541	₹432,741	46%	Ava	119,549	52,768	Apparel	181,841	86,462	Uttar Pradesh	120,652
			Charlotte	133,668	75,648	Appliances	183,416	89,049	Karnataka	166,915
			Liam	141,381	49,646	Gadgets	188,415	83,474	Tamil Nadu	115,299
			Emma	141,412	73,059	Fitness	229,546	103,306	West Bengal	8,543
			Sophia	143,616	66,715	<b>Grand Total</b>	<b>947,541</b>	<b>432,741</b>	Delhi	119,043
			Oliver	165,067	65,417				Rajasthan	125,114
			<b>Grand Total</b>	<b>947,541</b>	<b>432,741</b>				<b>Grand Total</b>	<b>947,541</b>
			<b>State</b>	<b>Sum of Sales</b>	<b>Sum of Profit</b>					
			Delhi	119,043.49	46,836.93					
			Karnataka	166,915.47	78,481.79					
			Maharashtra	291,974.25	136,372.06					
			Rajasthan	125,113.96	52,879.58					
			Tamil Nadu	115,298.58	57,952.59					
			Uttar Pradesh	120,652.39	57,451.86					
			West Bengal	8,543.21	2,765.89					
			<b>Grand Total</b>	<b>947,541.35</b>	<b>432,740.70</b>					

# Step 2: Create Charts using Pivot Tables

## Procedure

### 1. Use Pivot Table Summary

Start with an existing Pivot Table that summarizes your data (e.g., monthly sales and profit).

### 2. Insert Chart

Select the Pivot Table → Go to the "Insert" tab → Choose a chart type (e.g., 2-D Column, Line, etc).

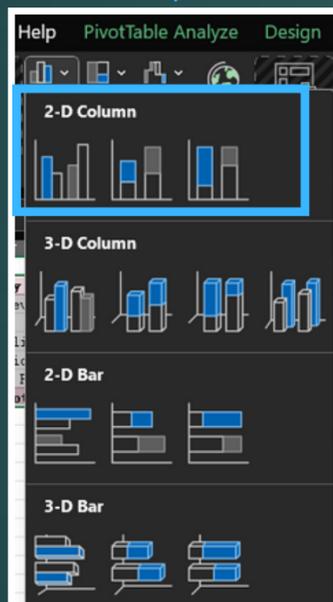
### 3. Customize Chart

Modify colors, labels, titles, and axis formats to match your insights and presentation theme.

### 4. Auto-Refresh with Pivot Changes

Charts automatically update when Pivot Table filters or data change.

Sum of Sales	Sum of Profit	Margin	Seller	Sales	Profit
947,541	432,741		Noah	102,849	49,488
₹947,541	₹432,741	46%	Ava	119,549	52,768
			Charlotte	133,668	75,648
			Liam	141,381	49,646
			Emma	141,412	73,059
			Sophia	143,616	66,715
			Oliver	165,067	65,417
			<b>Grand Total</b>	<b>947,541</b>	<b>432,741</b>
Month	Sales	Profit	State	Sum of Sales	Sum of Profit
Jan	109,755	45,036	Delhi	119,043.49	46,836.93
Feb	94,429	38,698	Karnataka	166,915.47	78,481.79
Mar	67,042	27,638	Maharashtra	291,974.25	136,372.06
Apr	113,749	55,219	Rajasthan	125,113.96	52,879.58
May	49,371	23,164	Tamil Nadu	115,298.58	57,952.59
Jun	107,348	42,950	Uttar Pradesh	120,652.39	57,451.86
Jul	91,445	44,342	West Bengal	8,543.21	2,765.89
Aug	60,441	32,708	<b>Grand Total</b>	<b>947,541.35</b>	<b>432,740.70</b>
Sep	63,269	31,109			
Oct	84,637	37,008			
Nov	61,698	34,648			
Dec	44,357	20,221			
<b>Grand Total</b>	<b>947,541</b>	<b>432,741</b>			



# Step 3: Insert Slicers

A **Slicer** is a visual filter in Excel that lets you interactively filter Pivot Tables and Pivot Charts using buttons.

*Use Case: Use slicers to quickly view sales or profit by Seller, State, or Category, with real-time updates across your entire dashboard.*



## Procedure

### 1. Insert a Slicer

Select your Pivot Chart or Table → Go to the “Insert” tab → Click “Slicer.”

### 2. Choose Slicer Categories

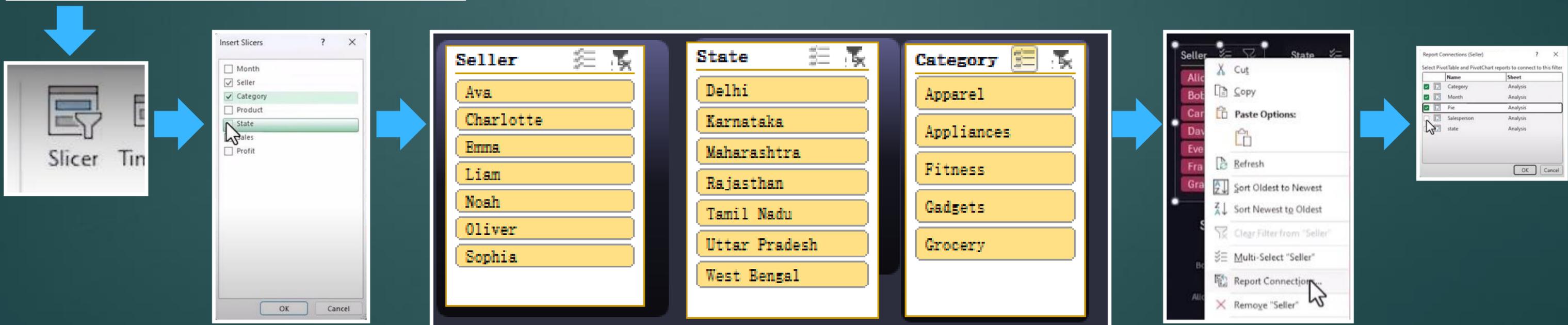
Pick relevant fields like Seller, State, or Category to use as filters.

### 3. Link Slicers to Charts/Tables

Right-click on the slicer → Choose “Report Connections” → Tick the checkboxes to link it to multiple PivotTables or PivotCharts.

### 4. Filter Data Visually

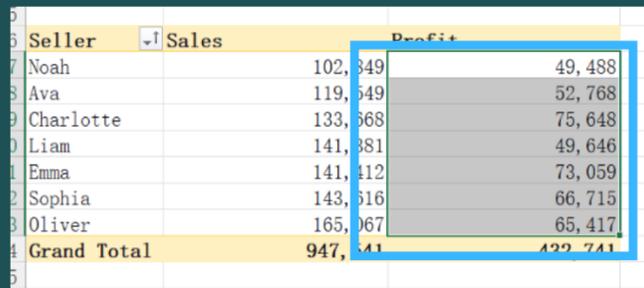
Use slicers to dynamically filter data and instantly update all connected visuals in your dashboard.



# Conditional Formatting

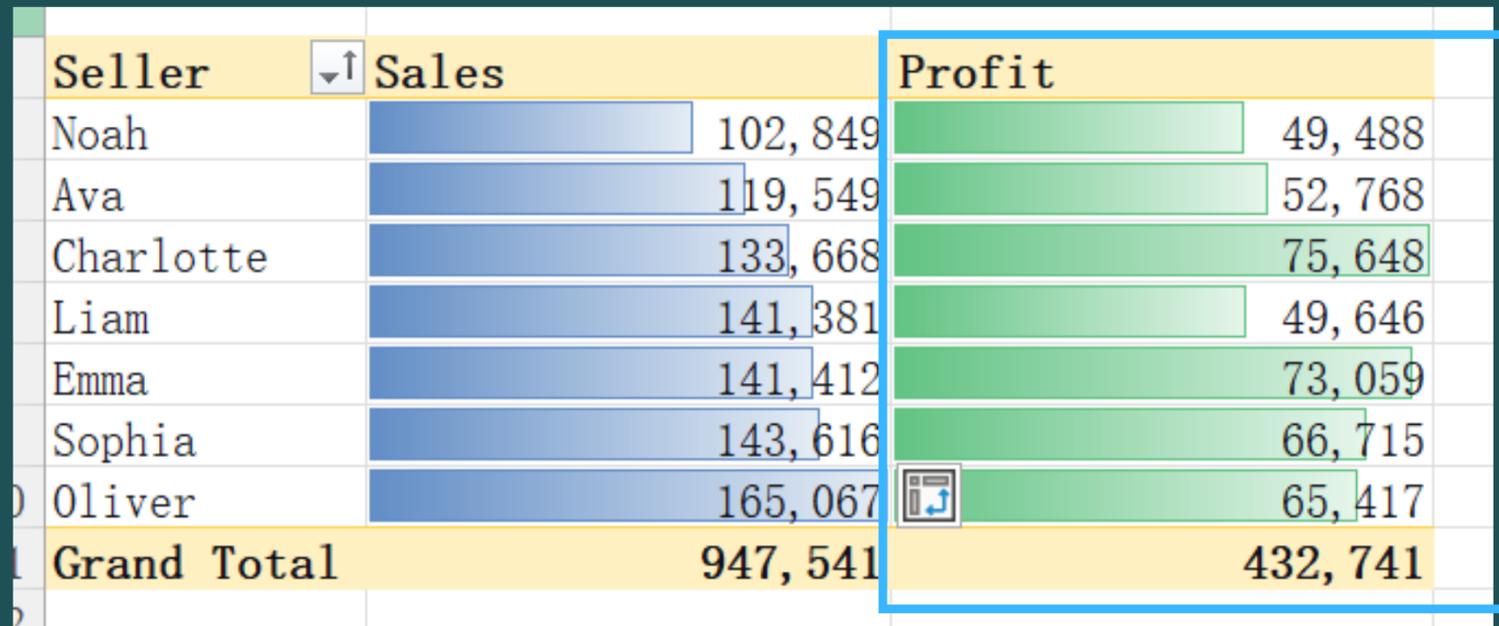
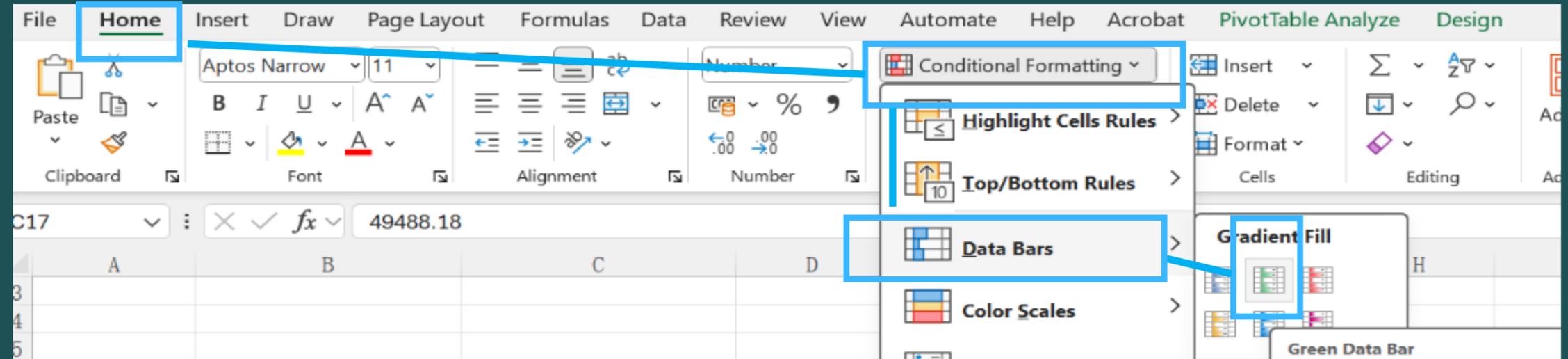
Data Range Selection

Conditional Formatting path



A screenshot of an Excel spreadsheet showing a table with columns 'Seller', 'Sales', and 'Profit'. The 'Profit' column is selected, and a blue arrow points from this selection towards the right.

Seller	Sales	Profit
Noah	102,849	49,488
Ava	119,549	52,768
Charlotte	133,668	75,648
Liam	141,381	49,646
Emma	141,412	73,059
Sophia	143,616	66,715
Oliver	165,067	65,417
Grand Total	947,541	432,741



A screenshot of the Excel spreadsheet showing the final result. The 'Profit' column now has green data bars applied to each cell, representing the profit values. A blue box highlights the entire data range.

Seller	Sales	Profit
Noah	102,849	49,488
Ava	119,549	52,768
Charlotte	133,668	75,648
Liam	141,381	49,646
Emma	141,412	73,059
Sophia	143,616	66,715
Oliver	165,067	65,417
Grand Total	947,541	432,741



Thank You