

Dynamic Dashboard



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Conditional Formatting

Format as Table

Cell Styles

Insert

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Sort & Filter

Find & Select

Add-ins

Analyze Data

S5

Q R S T U V W X Y Z AA AB AC AD AE AF AG AJ AK AL AM AN AO AP AQ AR

Select Player: **Adams, David**

	Cold Calls	Sales	AVG	Demos	Referrals	ncldsd Contre	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015														
2016														
2017														
2018														
2019														
2020														
Total:														

Step 1: Select Range, Group Rows

The screenshot shows the Microsoft Excel interface with the Data tab selected. The ribbon includes options for Get & Transform Data, Queries & Connections, Data Types, Sort & Filter, and Data Tools. The 'Outline' button is highlighted with a green box, and a tooltip for 'Group (Shift+Alt+Right)' is visible. A green arrow points from the 'Outline' button to the 'Group...' button in the dropdown menu.

The data table below shows a list of managers and their performance metrics across various categories.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Manager Name	YEAR	Office	Region	G	Cold Calls	Demos	Sales	Referrals	Unclsd Contract	Renewals	Warm Leads	S	T	U	V
2	Acosta, Robert	2015	BAL	AL	38	100	10	22	5	1	5	10	0	0	3	23
3	Adams, David	2015	NYA	AL	36	102	13	24	3	0	2	7	0	0	12	38
4	Adkins, Michael	2015	FLO	NL	41	102	5	25	6	0	1	10	0	0	6	21
5	Aguilar, Kevin	2015	MIL	NL	28	102	11	27	7	0	2	14	0	0	11	12
6	Alexander, Charles	2015	WAS	NL	28	103	16	22	4	1	6	15	0	2	9	30
7	Allen, Thomas	2015	OAK	AL	45	103	13	21	5	2	4	9	6	0	7	31
8	Allison, Timothy	2015	ARI	NL	45	104	11	24	8	0	2	12	1	1	7	29
9	Anderson, Terry	2015	SLN	NL	44	104	14	23	3	1	2	10	2	0	13	24
10	Andrews, Diane	2015	WAS	NL	67	104	16	15	6	0	3	12	5	1	25	43
11	Anthony, Robert	2015														
12	Armstrong, David	2015	CHA	AL	38	104	17	32	7	0	5	13	1	0	2	25
13	Arnold, Cole	2015	NYA	AL	37	106	9	27	7	0	1	9	0	0	17	15
14	Atkins, Kevin	2015	DET	AL	39	106	10	27	5	0	2	8	1	2	6	13
15	Austin, William	2015	SEA	AL	60	107	16	21	2	1	3	4	4	1	24	51
16	Ayala, Polly	2015	LAN	NL	44	108	6	30	5	0	0	16	0	0	14	18
17	Avers, Douglas	2015	NYN	NL	54	108	12	25	4	1	0	3	1	0	6	12

Dynamic Dashboard | Blank

Step 2: After Grouping, Click Minus To Hide

The screenshot shows the Microsoft Excel interface with the 'Data' tab selected. A data table is displayed with columns for Manager Name, YEAR, Office, Region, and various performance metrics. A green arrow points to a minus sign icon in the top right corner of the table area, which is used to collapse the table.

1	Manager Name	YEAR	Office	Region	G	Cold Calls	Demos	Sales	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Closed Calls	SO
2	Acosta, Robert	2015	BAL	AL	38	100	10	22	5	1	5	10	0	0	3	23
3	Adams, David	2015	NYA	AL	36	102	13	24	3	0	2	7	0	0	12	38
4	Adkins, Michael	2015	FLO	NL	41	102	5	25	6	0	1	10	0	0	6	21
5	Aguilar, Kevin	2015	MIL	NL	28	102	11	27	7	0	2	14	0	0	11	12
6	Alexander, Charles	2015	WAS	NL	28	103	16	22	4	1	6	15	0	2	9	30
7	Allen, Thomas	2015	OAK	AL	45	103	13	21	5	2	4	9	6	0	7	31
8	Allison, Timothy	2015	ARI	NL	45	104	11	24	8	0	2	12	1	1	7	29
9	Anderson, Terry	2015	SLN	NL	44	104	14	23	3	1	2	10	2	0	13	24
10	Andrews, Diane	2015	WAS	NL	67	104	16	15	6	0	3	12	5	1	25	43
11	Anthony, Robert	2015														
12	Armstrong, David	2015	CHA	AL	38	104	17	32	7	0	5	13	1	0	2	25
13	Arnold, Cole	2015	NYA	AL	37	106	9	27	7	0	1	9	0	0	17	15
14	Atkins, Kevin	2015	DET	AL	39	106	10	27	5	0	2	8	1	2	6	13
15	Austin, William	2015	SEA	AL	60	107	16	21	2	1	3	4	4	1	24	51
16	Ayala, Polly	2015	LAN	NL	44	108	6	30	5	0	0	16	0	0	14	18
17	Avers, Douglas	2015	NYN	NL	54	108	12	25	4	1	0	3	1	0	6	12

Step 4: Insert SUMIFS formula

File Home Insert Draw Page Layout Formulas **Data** Review View

Get Data Refresh All Queries & Connections Properties Workbook Links Stocks Currencies

Get & Transform Data Queries & Connections Data Types

S5 : X ✓ fx **=SUMIFS(\$F:\$F,\$A:\$A,\$S\$2,\$B:\$B,\$R5)**

	A	B	C	D	E	F	G	H
1	Manager Name	YEAR	Office	Region	G	Cold Calls	Demos	Sales
2	Acosta, Robert	2015	BAL	AL	38	100	10	22
3	Adams, David	2015	NYA	AL	36	102	13	24
4	Adkins, Michael	2015	FLO	NL	41	102	5	25
5	Aguilar, Kevin	2015	MIL	NL	28	102	11	27
6	Alexander, Charles	2015	WAS	NL	28	103	16	22
7	Allen, Thomas	2015	OAK	AL	45	103	13	21
8	Allison, Timothy	2015	ARI	NL	45	104	11	24
9	Anderson, Terry	2015	SLN	NL	44	104	14	23
10	Andrews, Diane	2015	WAS	NL	67	104	16	15
11	Anthony, Robert	2015						
12	Armstrong, David	2015	CHA	AL	38	104	17	32
13	Arnold, Cole	2015	NYA	AL	37	106	9	27
14	Atkins, Kevin	2015	DET	AL	39	106	10	27
15	Austin, William	2015	SEA	AL	60	107	16	21
16	Ayala, Polly	2015	LAN	NL	44	108	6	30
17	Ayers, Douglas	2015	NYN	NL	54	108	12	25
18	Bailey, Victor	2015	MIN	AL	43	108	11	17
19	Baker, Barney	2015	FLO	NL	33	109	8	23
20	Baldwin, Ray	2015	CLE	AL	30	110	10	30
21	Ball, Kirk	2015	OAK	AL	33	111	10	26
22	Ballard, Martin	2015	TBA	AL	40	111	15	22

Dynamic Dashboard Blank +

Formula:
=SUMIFS(\$F:\$F,\$A:\$A,\$S\$2,\$B:\$B,\$R5)

Description:
Type =SUMIFS, the sum range is "Cold Calls", Select entire column F, we fix it by pressing F4 shortcut (\$F:\$F). Criteria range number one is "Manager name", Select entire Column A, we fix it by pressing F4 shortcut (\$A:\$A). The Criteria that this value needs to equal is in the cell S2, we fix it (\$S\$2). Criteria Range number 2 is "Year", Select entire Column B, we fix it (\$B:\$B). The criteria that need to be here is cell R5, we fix only the Column (\$R5).

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What-If Analysis Forecast Analysis Forecast Sheet Outline

Forecast

Select: Adams, David

Cold Calls Sales AVG Demos Referra

=SUMIFS(\$F:\$F,\$A:\$A,\$S\$2,\$B:\$B,\$R5)

2016
2017
2018
2019
2020

Total:

Step 5: Drag this formula down

Microsoft Excel interface showing the Data ribbon and a PivotTable. The formula bar displays `=SUMIFS($F:$F,$A:$A,S2,$B:$B,$R5)`. A PivotTable is shown with 'Adams, David' selected, displaying Cold Calls for years 2015-2020. A green arrow points from the formula bar to the PivotTable, and another green arrow points from the PivotTable to the 'Total' row.

Formula Bar: `=SUMIFS($F:$F,$A:$A,S2,$B:$B,$R5)`

Manager Name	YEAR	Office	Region	G	Cold Calls	Demos	Sales	Referrals	Undsl Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Closed Calls	SO
Acosta, Robert	2015	BAL	AL	38	100	10	22	5	1	5	10	0	0	3	23
Adams, David	2015	NYA	AL	36	102	13	24	3	0	2	7	0	0	12	38
Adkins, Michael	2015	FLO	NL	41	102	5	25	6	0	1	10	0	0	6	21
Aguilar, Kevin	2015	MIL	NL	28	102	11	27	7	0	2	14	0	0	11	12
Alexander, Charles	2015	WAS	NL	28	103	16	22	4	1	6	15	0	2	9	30
Allen, Thomas	2015	OAK	AL	45	103	13	21	5	2	4	9	6	0	7	31
Allison, Timothy	2015	ARI	NL	45	104	11	24	8	0	2	12	1	1	7	29
Anderson, Terry	2015	SLN	NL	44	104	14	23	3	1	2	10	2	0	13	24
Andrews, Diane	2015	WAS	NL	67	104	16	15	6	0	3	12	5	1	25	43
Anthony, Robert	2015														
Armstrong, David	2015	CHA	AL	38	104	17	32	7	0	5	13	1	0	2	25
Arnold, Cole	2015	NYA	AL	37	106	9	27	7	0	1	9	0	0	17	15
Atkins, Kevin	2015	DET	AL	39	106	10	27	5	0	2	8	1	2	6	13
Austin, William	2015	SEA	AL	60	107	16	21	2	1	3	4	4	1	24	51
Ayala, Polly	2015	LAN	NL	44	108	6	30	5	0	0	16	0	0	14	18
Ayers, Douglas	2015	NYN	NL	54	108	12	25	4	1	0	3	1	0	6	12
Bailey, Victor	2015	MIN	AL	43	108	11	17	3	0	1	4	0	0	9	23
Baker, Barney	2015	FLO	NL	33	109	8	23	7	1	3	16	2	0	9	37
Baldwin, Ray	2015	CLE	AL	30	110	10	30	0	0	0	11	2	0	8	10
Ball, Kirk	2015	OAK	AL	33	111	10	26	8	0	1	10	0	0	8	31
Ballard, Martin	2015	TBA	AL	40	111	15	22	3	0	7	23	1	0	25	27

PivotTable Data:

Select:	Adams, David
2015	102
2016	101
2017	100
2018	101
2019	100
2020	101
Total:	

Step 6: Copy & Paste The Values

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** T5, $=SUMIFS(\$F:\$F,\$A:\$A,\$S\$2,\$B:\$B,\$R5)$
- Worksheet Grid:** Columns A through W, rows 1 through 22. The data table includes columns for Manager Name, YEAR, Office, Region, G, Cold Calls, Demos, Sales, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Closed Calls, and SO.
- Pivot Table:** Located on the right side of the grid. The filter is set to 'Adams, David'. The columns are Cold Calls, Sales, AVG, Demos, and Referrals. The rows are years from 2015 to 2020. The values for Cold Calls and Sales are circled in green.

Year	Cold Calls	Sales	AVG	Demos	Referrals
2015	102	102			
2016	101	101			
2017	100	100			
2018	101	101			
2019	100	100			
2020	101	101			
Total:					

Step 7: Change The Sum Range

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** Contains the formula `=SUMIFS($H:$H,$A:$A,S2,$B:$B,$R5)`, which is highlighted with a green box.
- Formula Hint:** Shows `SUMIFS(sum_range, criteria_range1, criteria1, [criteria_range2, criteria2], [criteria_range3, criteria3], ...)`.
- Worksheet Data:** A table with columns: Manager Name, YEAR, Office, Region, G, Cold Calls, Demos, Sales, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Closed Calls, SO.
- Pivot Table:** A pivot table with columns: Cold Calls, Sales, AVG, Demos, Referrals. The 'Sales' column is highlighted with a green box, and a green arrow points to it. The pivot table data is as follows:

	Cold Calls	Sales	AVG	Demos	Referrals
2015	102	101			
2016	101	101			
2017	100	100			
2018	101	101			
2019	100	100			
2020	101	101			
Total:					
- Green Box:** Contains the following text:

Formula:
`=SUMIFS($H:$H,$A:$A,S2,$B:$B,$R5)`

Description:
The only thing that we change is the sum range, which is "Sales" (Change `FF` with `HH`), everything else remains the same.

Step 8: Drag This Formula Down

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** Displays the formula `=SUMIFS($H:$H,$A:$A,S2,$B:$B,$R5)`.
- Main Data Table:** A table with columns: Manager Name, YEAR, Office, Region, G, Cold Calls, Demos, Sales, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Closed Calls, SO.
- Pivot Table:** A pivot table with rows for years (2015-2020) and columns for metrics (Cold Calls, Sales, AVG, Demos, Referrals). The cell for 2015 Sales is highlighted with a green box, and a green arrow points down from it.
- Navigation:** The bottom of the window shows a tab labeled "Dynamic Dashboard" and a "Blank" sheet.

Step 10: Change The Sum Range

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** Contains the formula `=SUMIFS($G:$G,$A:$A,S2,$B:$B,$R5)`, which is highlighted with a green border.
- Main Data Table:** A table with columns: Office, Region, G, Cold Calls, Demos, Sales, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Closed Calls, SO. Rows 1-19 contain data for various offices.
- Summary Table:** A table on the right with columns: Cold Calls, Sales, AVG, Demos, Referrals, Unc. Rows 2015-2020 contain data for 'Adams, David'. The 'Demos' cell for 2015 is highlighted with a green border and contains the formula `=$B:$B,$R5)`.
- Text Box:** A green box in the center contains the following text:

Formula:
`=SUMIFS($G:$G,$A:$A,S2,$B:$B,$R5)`

Description:
The only thing that we change is the sum range, which is "Demos" (Change it to \$H\$H), everything else remains the same.

Step 11: Change The Sum Range

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** `=SUMIFS(I:I,$A:$A,S2,$B:$B,$R5)` (highlighted in a green box).
- PivotTable:** A PivotTable with columns: Office, Region, G, Cold Calls, Demos, Sales, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Closed Calls, SO. The Referrals column is highlighted in blue.
- PivotChart:** A PivotChart showing a table with columns: Cold Calls, Sales, AVG, Demos, Referrals. The Referrals column is highlighted in blue. A green arrow points from the PivotTable to the Referrals column in the PivotChart.
- Text Box:** A green box containing the following text:

Formula:
`=SUMIFS(I:I,$A:$A,S2,$B:$B,$R5)`

Description:
The only thing that we change is the sum range, which is "Referrals" (Change it to I:I), everything else remains the same.

Step 12: Drag This Formula Left

W5 fx =SUMIFS(I:I,\$A:\$A,\$S\$2,\$B:\$B,\$R5)

	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC
1	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Closed Calls	50													
2	1	5	10	0	0	3	23													
3	0	2	7	0	0	12	38													
4	0	1	10	0	0	6	21													
5	0	2	14	0	0	11	12													
6	1	6	15	0	2	9	30													
7	2	4	9	6	0	7	31													
8	0	2	12	1	1	7	29													
9	1	2	10	2	0	13	24													
10	0	3	12	5	1	25	43													
11																				
12	0	5	13	1	0	2	25													
13	0	1	9	0	0	17	15													
14	0	2	8	1	2	6	13													
15	1	3	4	4	1	24	51													
16	0	0	16	0	0	14	18													
17	1	0	3	1	0	6	12													
18	0	1	4	0	0	9	23													
19	1	3	16	2	0	9	37													

Select: **Adams, David**

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed
2015	102	24		13	3	0	2	7	0	0		
2016	101	32										
2017	100	27										
2018	101	24										
2019	100	25										
2020	101	29										
Total:												

Description:
Since the sum range function is not fixed, and it is in the same order as data in the group we can just drag the formula left till "Quality Iss" which stays at Column N, everything else remains the same.

Step 13: Change The Sum Range

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** `=SUMIFS($O:$O,$A:$A,S2,$B:$B,$R5)` (highlighted with a green box).
- PivotTable:** Filtered by 'Adams, David'. Columns include '2015', '2016', '2017', '2018', '2019', '2020', 'Cold Calls', and 'Sale'. The 'Closed Calls' column is highlighted in blue.
- PivotChart:** A bar chart showing 'Closed Calls' for each year. The chart area is highlighted in blue.
- Callout Box:** A green box containing the following text:
 - Formula:**
`=SUMIFS($O:$O,$A:$A,S2,$B:$B,$R5)`
 - Description:**
The only thing that we change is the sum range, which is "Closed Calls" (Change \$F:\$F with \$O:\$O), everything else remains the same.

Step 14: Change The Sum Range

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** Contains the formula `=SUMIFS($F:$F,$A:$A,S2,$B:$B,$R5)`, which is highlighted with a green box.
- Worksheet:** Displays a table with columns: Quality Iss, Closed Calls, and 50. A dropdown menu is open, showing "Adams, David" selected.
- Table:** A table with columns: Cold Calls, Sales, and AVG. The rows represent years from 2015 to 2020. The "Cold Calls" column is highlighted with a green box.
- Formula Bar (Bottom):** Contains the formula `=SUMIFS($F:$F,$A:$A,S2,$B:$B,$R5)`, which is highlighted with a green box.
- Green Box:** Contains the formula `=SUMIFS($O:$O,$A:$A,S2,$B:$B,$R5)` and its description.

Formula:
`=SUMIFS($O:$O,$A:$A,S2,$B:$B,$R5)`

Description:
The only thing that we change is the sum range, which is "Cold Calls" (Change it to \$F:\$F), everything else remains the same.

Step 16: Insert IFERROR Function

The screenshot shows the Microsoft Excel interface with the 'Data' ribbon selected. The formula bar at the top displays the formula `=IFERROR(T5/S5,"-")`, which is highlighted with a green box. A green arrow points from this formula bar to cell U5 in the spreadsheet. The spreadsheet contains a table with columns for 'Cold Calls', 'Sales', 'AVG', 'Demos', 'Referrals', 'Unclsd Contract', 'Renewals', 'Warm Leads', 'Service Esc', 'Quality Iss', 'Defect Rate', 'Closed Calls', 'Cold Calls', and 'Call Ratio'. The 'AVG' column for the year 2015 is highlighted with a green box and contains the value 0.235. The formula bar also shows a dropdown menu with 'U5' selected.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0		12	102	
2016	101	32		17	6	0	2	8	4	2		4	101	
2017	100	27		9	2	0	1	7	0	2		2	100	
2018	101	24		9	4	0	4	17	0	0				
2019	100	25		6	5	0	0	5	1	1				
2020	101	29		11	4	2	2	15	0	0				

Formula:
`=IFERROR(T5/S5,"-")`

Description:
We insert IFERROR function in order not to allow to show any error code.

Step 20: Insert IFERROR Function

The screenshot shows the Microsoft Excel interface with the Data tab selected. The formula bar at the top displays the formula `=IFERROR(AE5/AD5,"-")`, which is highlighted with a green box. Below the formula bar, a table of data is visible. The table has columns for various metrics and rows for the years 2015 through 2020. The cell in row 5, column AF (Call Ratio) contains the value 8.5, which is also highlighted with a green box. A green arrow points from the formula bar to this cell. A green callout box in the bottom right corner contains the following text:

Formula:
`=IFERROR(AE5/AD5,"-")`

Description:
We insert IFERROR function in order not to allow to show any error code.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	
2018	101	24	0.238	9	4	0	4	17	0	0				
2019	100	25	0.250	6	5	0	0	5	1	1	50%			
2020	101	29	0.287	11	4	2	2	15	0	0				

Step 21: Drag This Formula Down

The screenshot shows the Microsoft Excel interface with the following elements:

- File Name:** 6. Dynamic Dashboard Pr...
- Formula Bar:** =IFERROR(AE5/AD5,"-")
- Worksheet:** Dynamic Dashboard
- Table:** A table with columns: Cold Calls, Sales, AVG, Demos, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Defect Rate, Closed Calls, Cold Calls, and Call Ratio. The data rows are for the years 2015 through 2020.
- Cell AF5:** Contains the value 8.5, which is highlighted with a green box. A green arrow points from the formula bar to this cell.
- Cell AD5:** Contains the value 102, which is also highlighted with a green box. A green arrow points from this cell down to cell AD6.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3

Step 23: Copy & Paste SUM Formula

The screenshot shows the Microsoft Excel interface with the following details:

- Formula Bar:** Displays the formula `=SUM(S5:S10)` for cell S12.
- Worksheet:** Contains a table for 'Adams, David' with columns: Cold Calls, Sales, AVG, Demos, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Defect Rate, Closed Calls, Cold Calls, and Call Ratio.
- Data Table:**

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	-	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161		65	24	2	11	59	5	5		30	605	
- Annotations:** Green arrows point from the 'Sales' column in rows 5-10 to the 'Total' cell in row 12. The 'Total' cell (S12) and the 'Sales' column values in the total row are highlighted with green boxes.

Step 24: Copy & Paste IFERROR Formulas

The screenshot shows the Microsoft Excel interface with the following details:

- File Name:** 6. Dynamic Dashboard Pr...
- Search Bar:** Search
- Current Tab:** Data
- Formula Bar:** `=IFERROR(T10/S10,"-")`
- Table Data:**

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	1	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	2	0.250	6	5	0	0	5	1	0	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Step 25: Apply Conditional Formatting

The screenshot shows the Microsoft Excel interface with the following elements:

- File Name:** 6. Dynamic Dashboard Pr...
- Font:** Calibri, size 11, bold (B) is highlighted.
- Conditional Formatting Menu:** Open, showing options like Highlight Cells Rules, Top/Bottom Rules, Data Bars, Color Scales, and Icon Sets. The 'Green - Yellow Color Scale' is selected.
- Worksheet:** A table with columns for years (2015-2020) and various metrics. The 'Call Ratio' column is highlighted in yellow and green based on the values.
- Callout Box:** A green box with white text providing instructions for the step.

	Cold Calls	Sales	Avg	Demos	Referrals	Unclsd Contract	Renewal	Call Ratio		
2015	102	24	0.235	13	3	0	2	8.5		
2016	101	32	0.317	17	6	0	2	25.3		
2017	100	27	0.270	9	2	0	1	50.0		
2018	101	24	0.238	9	4	0	4	20.2		
2019	100	25	0.250	6	5	0	0	33.3		
2020	101	29	0.287	11	4	2	2	25.3		
Total:	605	161	0.266	65	24	2	11	59	5	50

Description:
Select Range (U5:U10), make it bold. Click Conditional formatting to apply the colors to a range.

Step 26: Apply Conditional Formatting

The screenshot shows the Microsoft Excel interface. The ribbon is set to 'Home', and the 'Conditional Formatting' dropdown menu is open. The 'Color Scales' option is selected, and a sub-menu is visible with a color scale icon highlighted. The spreadsheet data is as follows:

		Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Ren...						
1														
2	Select:	Adams, David												
3														
4														
5	2015	102	24	0.235	13	3	0	2						
6	2016	101	32	0.317	17	6	0	2						
7	2017	100	27	0.270	9	2	0	1						
8	2018	101	24	0.238	9	4	0	4						
9	2019	100	25	0.250	6	5	0	0						
10	2020	101	29	0.287	11	4	2	2						
11														
12	Total:	605	161	0.266	65	24	2	11	59	5	5	50		
13														
14														
15														
16														
17														

Description:
Select Range (X5:X10), make it bold. Click Conditional formatting to apply the colors to a range.

Step 27: Apply Conditional Formatting

The screenshot shows the Microsoft Excel interface with the following elements:

- File Name:** 6. Dynamic Dashboard Pr...
- Font:** Calibri, size 11. The **B** (Bold) button is highlighted with a green box.
- Formulas Bar:** =SUMIFS(L:L,\$A:\$A,\$S\$2,\$B:\$B,\$R5)
- Conditional Formatting Menu:** Open, showing options like Highlight Cells Rules, Top/Bottom Rules, Data Bars, Color Scales, and Icon Sets. A green box highlights the 'Conditional Formatting' button in the ribbon, and another green box highlights a color scale rule in the dropdown menu.
- Table Data:**

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewal
2015	102	24	0.235	13	3	0	2							
2016	101	32	0.317	17	6	0	2							
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5				

Description:
Select Range (AF5:AF10),
make it bold. Click
Conditional formatting to
apply the colors to a range.

Step 28: Insert Sales Chart

The screenshot shows the Microsoft Excel interface with the 'Insert' tab selected. The 'Recommended Charts' dialog box is open, displaying a 'Custom Combination' chart. The chart configuration shows two series: 'Sales' (Clustering Column) and 'AVG' (Line). The 'Secondary Axis' checkbox is checked. The 'OK' button is highlighted.

Table Data:

	Cold Calls	Sales	AVG	Demc
2015	102	24	0.235	13
2016	101	32	0.317	17
2017	100	27	0.270	9
2018	101	24	0.238	9
2019	100	25	0.250	6
2020	101	29	0.287	11
Total:	605	161	0.266	65

Chart Configuration:

Series Name	Chart Type	Secondary Axis
Sales	Clustering Column	<input type="checkbox"/>
AVG	Line	<input checked="" type="checkbox"/>

Description:
Select Range (T5:U10), Click Insert, Recommended Charts, Select Combo, Check the Secondary Axis, Press OK.

Step 29: Add Axis Titles

The screenshot shows the Microsoft Excel interface with the Chart Design ribbon active. The ribbon includes sections for Chart Layouts, Chart Styles, Data, Type, and Location. The 'Chart Elements' task pane is open, showing options for 'Axis Titles'. The 'Primary Vertical' and 'Secondary Vertical' options are checked. A green box highlights the 'More Options...' button in the task pane. A green arrow points from the 'More Options...' button to the 'Axis Titles' section of the task pane. Another green arrow points from the 'More Options...' button to the 'Secondary Vertical' option. A third green arrow points from the 'More Options...' button to the 'Secondary Horizontal' option. The chart area shows a combination bar and line chart with two data series: 'Sales' (blue bars) and 'AVG' (orange line). The chart has two vertical axes, both labeled 'Axis Title'. The 'More Options...' button is highlighted with a green box. The 'Axis Titles' section of the task pane is also highlighted with a green box. The 'Secondary Vertical' and 'Secondary Horizontal' options are also highlighted with green boxes. The 'More Options...' button is highlighted with a green box. The 'More Options...' button is highlighted with a green box. The 'More Options...' button is highlighted with a green box.

	Q	R	S	T	U	V	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AJ	AK	AL	AM	AN
9		2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3					
10		2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3					
12		Total:	605	161	0.266	65	24		11	59	5	5	50%	30	605	20.2					

Chart Elements

- Axes
- Axis Titles
- Chart Title
- Data Labels
- Data Table
- Error Bars
- Gridlines
- Legend
- Trendline
- Up/Down Bars

Primary Horizontal

Primary Vertical

Secondary Horizontal

Secondary Vertical

More Options...

Description:
Press More button,
Add Primary and
Secondary Axis Titles.
On the left type
"Sales", on the right
type "AVG".

Step 30: Click Edit Horizontal Axis

The screenshot shows the Microsoft Excel interface with the Chart Design ribbon active. A data table is visible in the background, and a chart is displayed in the foreground. The 'Select Data Source' dialog box is open, showing the chart data range and legend entries. The 'Sales' series is checked, and the 'Edit' button for the horizontal axis labels is highlighted.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Cont
2015	102	24	0.235	13	3	0
2016	101	32	0.317	17	6	0
2017	100	27	0.270	9	2	0
2018	101	24	0.238	9	4	0
2019	100	25	0.250	6	6	0
2020	101	29	0.287	11	4	2
Total:	605	161	0.266	65	24	

Description:
Click Chart, Select Data, Check Sales box, Click Edit.

Step 31: Select Range

The screenshot shows the Microsoft Excel interface with the 'Chart Design' ribbon active. The data table below shows performance metrics for 'Adams, David' from 2015 to 2020. A dialog box titled 'Axis Labels' is open, with the 'OK' button highlighted. A green box highlights the year range 2015-2020 in the table. A green arrow points from the 'OK' button to the description box.

	Cold Calls	Sales	AVG	Demos	Referrals	Undsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9		0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238						0	0	-	5	101	20.2
2019	100	25	0.250						1	1	50%	3	100	33.3
2020	101	29	0.287						0	0	-	4	101	25.3
Total:	605	161	0.266						5	5	50%	30	605	20.2

Axis Labels ? X
Axis label range:
='Dynamic Dashboard'!\$R\$10 = 2015, 2016, 20...

Dynamic Dashboard | Blank | +

Description:
Select Range, Press
OK.

Step 32: Click Edit Horizontal Axis

The screenshot shows the Microsoft Excel interface with the 'Chart Design' tab selected. A 'Select Data Source' dialog box is open over a chart. The chart data range is set to `=Dynamic Dashboard!T4:R10,Dynamic Dashboard!T4:U10`. In the 'Legend Entries (Series)' section, the 'AVG' series is checked. In the 'Horizontal (Category) Axis Labels' section, the 'Edit' button is highlighted with a green box. A green callout box at the bottom right contains the text: **Description:** Check AVG box, Click Edit.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Con
2015	102	24	0.235	13	3	0
2016	101	32	0.317	17	6	0
2017	100	27	0.270	9	2	0
2018	101	24	0.238	9	4	0
2019	100	25	0.250	6	5	0
2020	101	29	0.287	11		2
Total:	605	161	0.266	65	24	2

Step 33: Select Range

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File Home Insert Draw Page Layout Formulas Data Review View Developer Help **Chart Design** Format

Chart Layouts: Add Chart Element, Quick Layout, Change Colors

Chart Styles: [Various chart style thumbnails]

Data: Switch Row/Column, Select Data

Type: Change Chart Type

Location: Move Chart

R5

Select: **Adams, David**

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9		0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238						0	0	-	5	101	20.2
2019	100	25	0.250						1	1	50%	3	100	33.3
2020	101	29	0.287						0	0	-	4	101	25.3
Total:	605	161	0.266						5	5	50%	30	605	20.2

Axis Labels

Axis label range:
='Dynamic Dashboard!\$R\$10' = 2015, 2016, 20...

OK Cancel

Sales

AVG

Dynamic Dashboard | Blank

Description:
Select Range, Press
OK.

Step 34: Press OK

The screenshot shows the Microsoft Excel interface with the 'Chart Design' tab active. A data table for 'Adams, David' is displayed, along with a combined bar and line chart. The 'Select Data Source' dialog box is open, showing the chart data range and legend entries. A green arrow points to the 'OK' button in the dialog box.

Select: Adams, David

	Cold Calls	Sales	AVG	Demos	Referrals	Undsd Con
2015	102	24	0.235	13	3	0
2016	101	32	0.317	17	6	0
2017	100	27	0.270	9	2	0
2018	101	24	0.238	9	4	0
2019	100	25	0.250	6	5	0
2020	101	29	0.287	11	4	2
Total:	605	161	0.266	65	24	2

Chart Data Range: ='Dynamic Dashboard'!\$R\$4:\$R\$10;'Dynamic Dashboard'!\$T\$4:\$U\$10

Legend Entries (Series): Sales, AVG

Horizontal (Category) Axis Labels: 2015, 2016, 2017, 2018, 2019

OK **Cancel**

Step 35: Right Click, Add Data Label

The screenshot shows the Microsoft Excel interface with the 'Chart Design' ribbon active. A chart is displayed with a context menu open over the 'AVG' data point. The 'Add Data Label' option is highlighted with a green box and a green arrow. The chart shows 'Sales' as blue bars and 'AVG' as an orange line. A data table is visible in the background.

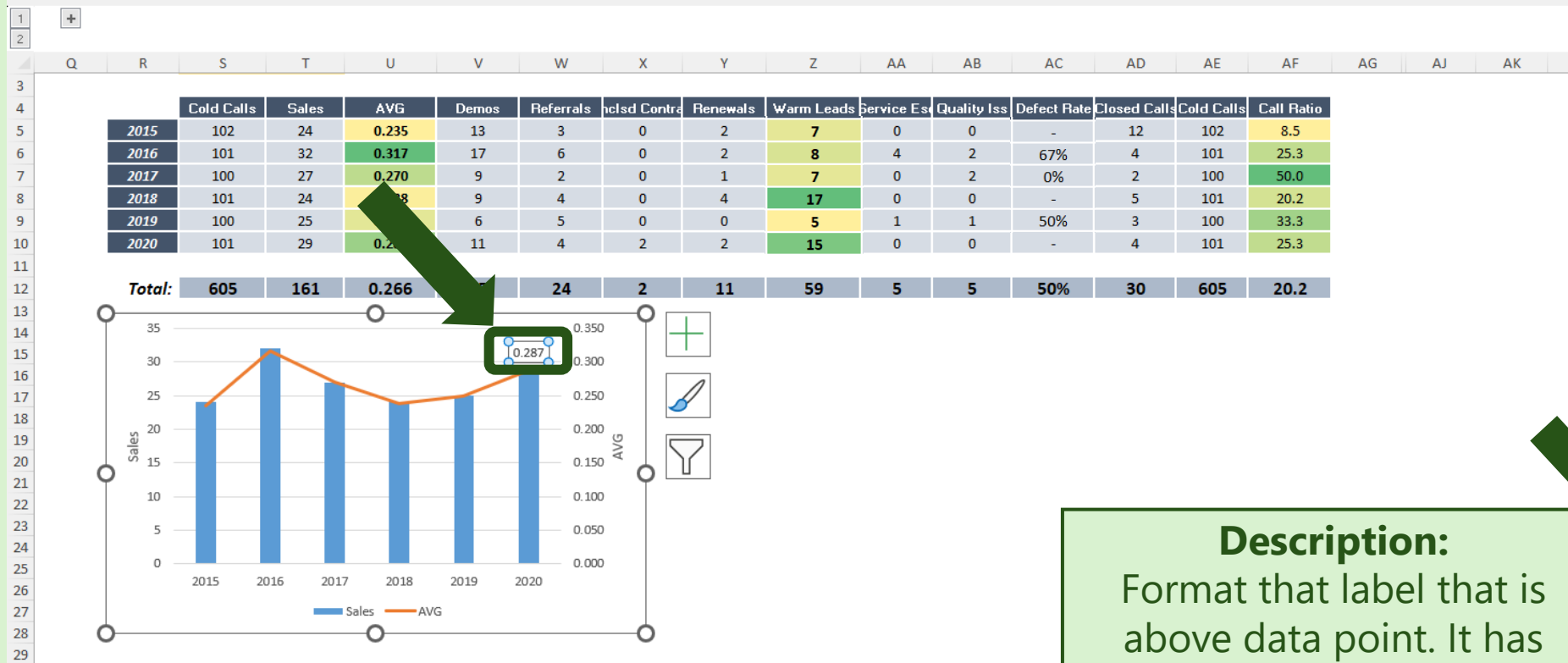
	Cold Calls	Sales	AVG	Demos
2015	102	24	0.235	13
2016	101	32	0.317	17
2017	100	27	0.270	15
2018	101	24	0.238	14
2019	100	25	0.250	16
2020	101	29	0.287	11
Total:	605	161	0.266	65

Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
0	0	-	12	102	8.5
4	2	67%	4	101	25.3
0	2	0%	2	100	50.0
0	0	-	5	101	20.2
1	1	50%	3	100	33.3
0	0	-	4	101	25.3
5	5	50%	30	605	20.2

Description:
On the last point on the line, add a data label, format that label that is above data point. It has background fill.

Step 36: Format Label

Microsoft Excel ribbon showing the 'Format' tab. The ribbon includes sections for Clipboard, Font, Alignment, Number, Styles, Cells, Editing, and Add-ins. The 'Format' section is highlighted, showing options like Conditional Formatting, Format as Table, and Cell Styles.



Format Data Labels task pane. It shows 'Label Options' and 'Text Options'. Under 'Label Position', the 'Above' radio button is selected, which is highlighted with a green circle. A green arrow points from the 'Above' option to the 'Description' box.

Description:
Format that label that is above data point. It has background fill.

Step 37: Apply Background fill

The screenshot shows the Microsoft Excel interface with the following elements:

- Excel Ribbon:** File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help, Chart Design, Format.
- Chart Design Ribbon:** Conditional Formatting, Format as Table, Cell Styles, Insert, Delete, Format, Cells, Editing, Add-ins, Analyze Data.
- Table Data:**

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contra	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	24	2	11	59	5	5	50%	30	605	20.2	
- Chart:** A combination bar and line chart showing Sales (blue bars) and AVG (orange line) from 2015 to 2020. A data label '0.287' is positioned above the 2020 AVG data point.
- Format Data Labels Task Pane:** Open on the right, showing 'Label Options' and 'Text Options'. Under the 'Fill' section, 'Solid fill' is selected. A color selection icon is also visible.

Description:
Format that label that is above data point. It has background fill.

Step 38: Add Marker The Chart

Microsoft Excel interface showing the 'Format Data Point' task pane for a line chart. The chart displays 'Sales' (blue bars) and 'AVG' (orange line) from 2015 to 2020. A data point on the 'AVG' line for 2018 is highlighted with a value of 0.287. The task pane shows the 'Marker' option selected under 'Line' and 'Marker Options', with 'Built-in' selected and 'Type' set to a diamond shape and 'Size' set to 7. The 'Fill' section shows 'Solid fill' selected.

Description:
At the last label of the line, add marker. Select marker, size 7. solid fill white

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contra	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	24	2	11	59	5	5	50%	30	605	20.2	

Step 39: Duplicate The Chart

The screenshot shows the Microsoft Excel interface with the following elements:

- Window Title:** 6. Dynamic Dashboard Pr...
- Ribbon:** File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help.
- Home Tab:** Clipboard, Font (Calibri, 11), Alignment, Number, Styles (Conditional Formatting, Format as Table, Cell Styles), Cells (Insert, Delete, Format), Editing (Sort & Filter, Find & Select), Add-ins, Analyze Data.
- Worksheet:** Columns Q-AR, Rows 1-28. Data for 'Adams, David' from 2015 to 2020.
- Table Data:**

	Cold Calls	Sales	AVG	Demos	Referrals	ncld Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Chart Description: A combination bar and line chart showing Sales (blue bars) and AVG (orange line) from 2015 to 2020. The chart is highlighted with a green box. A duplicate of this chart is shown below it, also highlighted with a green box. A green arrow points from the original chart to the duplicate.

Description:
Select Chart, CTRL+D
(It duplicates the chart)

Step 40: Click Chart, Grab Source Array

6. Dynamic Dashboard Pr... | Search | Leutrim Hoti

File Home Insert Page Layout Formulas Data Review View Developer Help Chart Design Format

Chart 6: $=SERIES('Dynamic Dashboard'!T4,'Dynamic Dashboard'!R5:R10,'Dynamic Dashboard'!T5:T10,1)$

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Sales

AVG

0.287

0.287

Dynamic Dashboard | Blank

Description:
Click in the chart and grab the source array.

Step 41: Change The Source Array Location

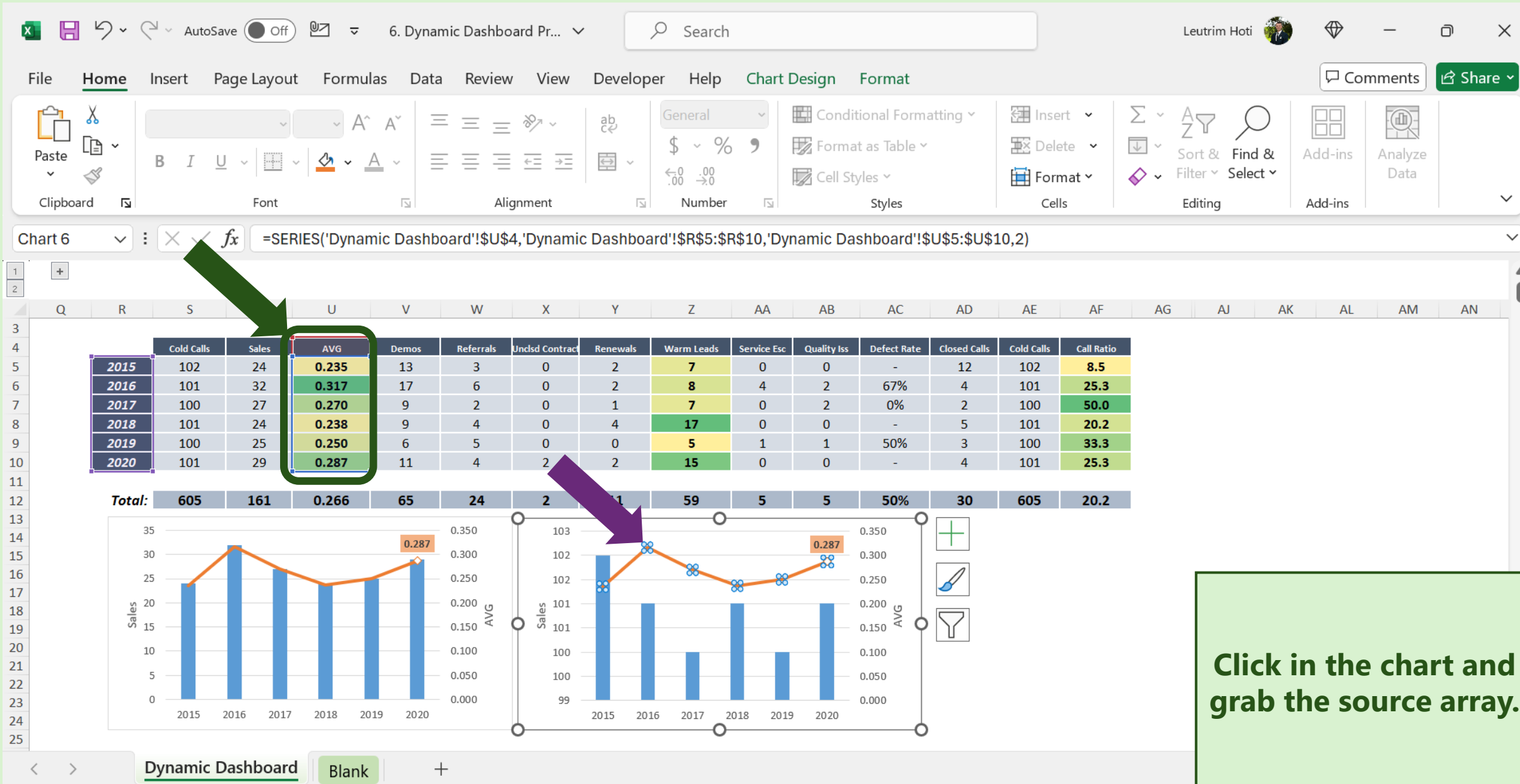
The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** `=SERIES('Dynamic Dashboard'!$$$4,'Dynamic Dashboard'!R5:R10,'Dynamic Dashboard'!$$$5:$$$10,1)`
- Table:** A table with columns: Cold Calls, Sales, AVG, Demos, Referrals, Unclsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Defect Rate, Closed Calls, Cold Calls, Call Ratio. Rows include years 2015-2020 and a Total row.
- Charts:** Two charts are displayed. The left chart is a combination bar and line chart showing Sales (blue bars) and AVG (orange line) from 2015 to 2020. The right chart is a similar combination chart, also showing Sales and AVG from 2015 to 2020.
- Annotation:** A green arrow points to the 'Cold Calls' column in the table.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Put the source array at "Cold Calls".

Step 42: Click Chart, Grab Source Array



The screenshot displays the Microsoft Excel interface with the following elements:

- Formula Bar:** Contains the formula `=SERIES('Dynamic Dashboard'!U4,'Dynamic Dashboard'!R5:R10,'Dynamic Dashboard'!U5:U10,2)`.
- Data Table:** A table with columns: Cold Calls, Sales, AVG, Demos, Referrals, Undsd Contract, Renewals, Warm Leads, Service Esc, Quality Iss, Defect Rate, Closed Calls, Cold Calls, Call Ratio. Rows include years 2015-2020 and a Total row.
- Chart:** A combination bar and line chart showing Sales (blue bars) and AVG (orange line) from 2015 to 2020. The AVG data point for 2020 is highlighted with a value of 0.287.

Callout Box: Click in the chart and grab the source array.

Step 43: Change The Source Array Location

6. Dynamic Dashboard Pr... | Search | Leutrim Hoti

File Home Insert Page Layout Formulas Data Review View Developer Help Chart Design Format

Chart 6: $=SERIES('Dynamic Dashboard'!Z4,'Dynamic Dashboard'!R5:R10,'Dynamic Dashboard'!Z5:Z10,2)$

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Sales (Bar Chart): 2015 (24), 2016 (32), 2017 (27), 2018 (24), 2019 (25), 2020 (29)

AVG (Line Chart): 2015 (0.235), 2016 (0.317), 2017 (0.270), 2018 (0.238), 2019 (0.250), 2020 (0.287)

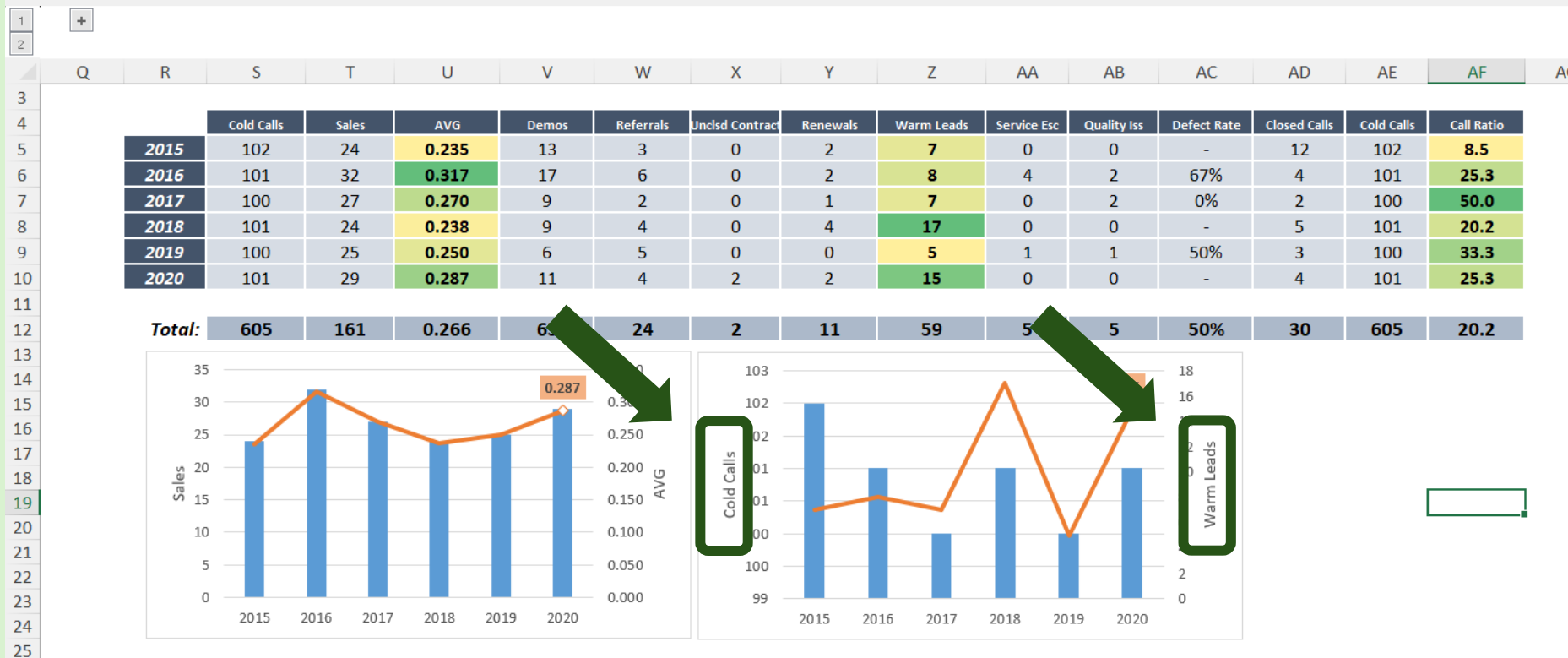
Sales and AVG (Combination Chart): 2015 (Sales: 102, AVG: 0.235), 2016 (Sales: 101, AVG: 0.317), 2017 (Sales: 100, AVG: 0.270), 2018 (Sales: 101, AVG: 0.238), 2019 (Sales: 100, AVG: 0.250), 2020 (Sales: 101, AVG: 0.287)

Dynamic Dashboard | Blank

Put the source array at "Warm Leads".

Step 44: Add Axis Names

Microsoft Excel interface showing the ribbon with tabs: File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help. The Home tab is active, displaying toolbars for Clipboard, Font, Alignment, Number, Styles, Cells, and Editing. The status bar at the bottom shows 'AF19'.



Format Shape task pane showing the Fill section with options: No fill, Solid fill, Gradient fill, Picture or texture fill, Pattern fill.

Description:
On the left, type "Cold Calls". On the right, type "Warm Leads".

Step 45: Format The Color

The screenshot displays the Microsoft Excel interface with the 'Format Data Series' task pane open. The task pane shows the 'Fill' section with 'Solid fill' selected. A green arrow points to the color selection icon, and another green arrow points to the 'Color' dropdown menu. A green callout box contains the following text:

Description:
Click the bars, click solid fill. Change the color of the bars to light green.

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Step 46: Duplicate The Chart

The screenshot shows the Microsoft Excel interface with the following data table and charts:

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contract	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	8	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65		2	11	59	5	5	50%		605	20.2

Three charts are displayed below the table:

- Left chart: Bar chart for Sales and line chart for AVG.
- Middle chart (highlighted): Bar chart for Cold Calls and line chart for Warm Leads.
- Right chart: Bar chart for Cold Calls and line chart for Warm Leads.

A green box highlights the middle chart, and a text box explains the duplication process:

Description:
Select Chart, CTRL+D
(It duplicates the chart)

Step 47: Format The Color

The screenshot shows the Microsoft Excel interface with the 'Format Data Series' task pane open. The task pane has three icons at the top: a bar chart (selected), a line chart, and a pie chart. Under the 'Fill' section, the 'Solid fill' option is selected. A green arrow points from the 'Solid fill' option to the 'Color' dropdown menu, which is also highlighted with a green box. The main area of the spreadsheet contains three charts: a bar chart for 'Sales' (2015-2020), a bar chart for 'Cold Calls' (2015-2020), and a line chart for 'Warm Leads' (2015-2020). A green callout box with a white background and a green border contains the following text:

Description:
Click the bars, click solid fill. Change the color of the bars to grey. Turn Chart to Dynamic chart. Drag the chart and make it bigger.

Year	Sales	Cold Calls	Warm Leads
2015	24	102	10
2016	31	101	10
2017	26	100	12
2018	23	101	16
2019	25	100	8
2020	28	101	15

Step 48: Insert Select metric 1 & 2

Microsoft Excel interface showing a dynamic dashboard for "Adams, David". The dashboard includes a data table, a bar chart for Sales, a line chart for AVG, and a combined bar and line chart for Cold Calls and Warm Leads. A green arrow points from the AVG metric in the table to a "Select metric 1" dropdown in a chart. A green box highlights the "Select metric 1" and "Select metric 2" dropdowns.

Excel Ribbon: File, Home, Insert, Page Layout, Formulas, Data, Review, View, Developer, Help

Excel Ribbon: Clipboard, Font, Alignment, Number, Styles, Cells, Editing, Add-ins, Analyze Data

Excel Ribbon: Conditional Formatting, Format as Table, Cell Styles, Insert, Delete, Format, Sort & Filter, Find & Select, Add-ins, Analyze Data

Excel Ribbon: Comments, Share

Excel Ribbon: Search, Leutrim Hoti

Excel Ribbon: AutoSave Off, 6. Dynamic Dashboard Pr... • Saved to this PC

Excel Ribbon: S2, Adams, David

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	0	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	2	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Dynamic Dashboard

Blank

Step 49: Add Data Validation for Cell Z15

6. Dynamic Dashboard Pr... | Search | Leutrim Hoti

File Home Insert Page Layout Formulas **Data** Review View Developer Help

Get & Transform Data | Queries & Connections | Data Types | Sort & Filter | Data

Get Data | Refresh All | Properties | Workbook Links | Stocks | Currencies | Sort | Filter | Clear | Reapply | Advanced | Text to Columns | What-If Analysis | Forecast Sheet | Outline

Z15 | fx

Data Validation...

- Circle Invalid Data
- Clear Validation Circles

Select: Adams, David

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contra	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	0	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	0	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Select metric: [] Select metric 2: []

Sales | AVG

Cold Calls | Warm Leads

Dynamic Dashboard | Blank

Description:
Click cell Z15, add data validation.

Step 50: Select Range for Data Validation

The screenshot displays the Microsoft Excel interface with the 'Data' tab selected in the ribbon. The 'Data Validation' dialog box is open, showing the 'Settings' tab. The 'Validation criteria' section is configured as follows:

- Allow:** List
- Data:** between
- Source:** =\$AH\$2:\$AH\$14
- Ignore blank
- In-cell dropdown

The background shows a dashboard with a table of sales data for the years 2015 to 2020. The table includes columns for Cold Calls, Sales, AVG, and Demos. A bar chart below the table shows sales data from 2015 to 2020. On the right side of the dashboard, there is a list of names and their corresponding Call Ratio values.

Year	Cold Calls	Sales	AVG	Demos
2015	102	24	0.235	13
2016	101	32	0.317	17
2017	100	27	0.270	9
2018	101	24	0.238	9
2019	100	25	0.250	6
2020	101	29	0.287	6
Total:	605	161	0.266	65

Category	Value
Sales	Acosta, Robert
AVG	Adams, David
Demos	Adkins, Michael
Referrals	Aguilar, Kevin
Unclsd Contract	Alexander, Charles
Renewals	Allen, Thomas
Warm Leads	Allison, Timothy
Service Esc	Anderson, Terry
Quality Iss	Andrews, Diane
Defect Rate	Anthony, Robert
Closed Calls	Armstrong, David
Cold Calls	Arnold, Cole
Call Ratio	Atkins, Kevin
	Austin, William
	Ayala, Polly
	Ayers, Douglas
	Bailey, Victor
	Baker, Barney
	Baldwin, Ray
	Ball, Kirk
	Ballard, Martin
	Barker, Heidi
	Barnes, Grant
	Barnett, Brenda
	Bartlett, Julia
	Barton, Barry
	Bass, Justin

Step 51: Add Data Validation for Cell AC15

The screenshot shows the Microsoft Excel interface with the **Data** tab selected on the ribbon. The ribbon includes options like **Sort**, **Filter**, **Text to Columns**, and **Data Validation**. A context menu is open over cell AC15, with **Data Validation...** highlighted. A green arrow points from cell AC15 in the data table to the **Data Validation...** option in the menu.

Data Table:

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contra	Renewals	Warm Leads	Service Esc	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	0	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	50%	30	605	605	20.2

Dynamic Dashboard:

- Bar chart showing Sales (2015-2020).
- Line chart showing AVG (2015-2020).
- Bar chart showing Cold Calls (2015-2020).
- Line chart showing Warm Leads (2015-2020).

Dynamic Dashboard Controls:

- Select: Adams, David
- Select metric 1: [Dropdown]
- Select metric 2: [Dropdown]

Dynamic Dashboard Data:

Metric	2015	2016	2017	2018	2019	2020
Sales	24	32	27	24	25	29
AVG	0.235	0.317	0.270	0.238	0.250	0.287
Cold Calls	102	101	100	101	100	101
Warm Leads	7	8	7	17	5	15

Dynamic Dashboard Legend:

- Sales
- AVG
- Demos
- Referrals
- Unclsd Contract
- Renewals
- Warm Leads
- Service Esc
- Quality Iss
- Defect Rate
- Closed Calls
- Cold Calls
- Call Ratio

Dynamic Dashboard Data:

Name	Value
Acosta, Robert	18
Adams, David	16
Adkins, Michael	14
Aguilar, Kevin	12
Alexander, Charles	10
Allen, Thomas	8
Allison, Timothy	6
Anderson, Terry	14
Andrews, Diane	12
Anthony, Robert	10
Armstrong, David	8
Arnold, Cole	6
Atkins, Kevin	14
Austin, William	12
Ayala, Polly	10
Ayers, Douglas	8
Bailey, Victor	6
Baker, Barney	14
Baldwin, Ray	12
Ball, Kirk	10
Ballard, Marti	8
Barker, Heidi	6
Barnes, Grant	14
Barnett, Bren	12
Bartlett, Julia	10
Barton, Barry	8
Bass, Justin	6

Dynamic Dashboard Description:

Description:
Click cell AC15, add data validation.

Step 52: Select Range for Data Validation

The screenshot shows the Microsoft Excel interface with the **Data** ribbon selected. The **Data Validation** dialog box is open, displaying the **Settings** tab. The **Validation criteria** section is configured as follows:

- Allow:** List
- Data:** between
- Source:** =\$AH\$2:\$AH\$14
- Ignore blank
- In-cell dropdown

The **OK** button is highlighted with a purple box. In the background, a table displays sales data for the years 2015 to 2020. A list of names is visible in column AH, with a green box highlighting the list items. Green arrows indicate the flow of the process: from the **Data** ribbon to the dialog box, and from the table to the **List** and **Source** fields.

	Cold Calls	Sales	AVG	Demo
2015	102	24	0.235	13
2016	101	32	0.317	17
2017	100	27	0.270	9
2018	101	24	0.238	9
2019	100	25	0.250	6
2020	101	29	0.287	4
Total:	605	161	0.266	65

Call Ratio	
8.5	
25.3	
50.0	
20.2	
33.3	
25.3	
20.2	

Names
Acosta, Robert
Adams, David
Adkins, Michael
Aguilar, Kevin
Alexander, Charles
Allen, Thomas
Allison, Timothy
Anderson, Terry
Andrews, Diane
Anthony, Robert
Armstrong, David
Arnold, Cole
Atkins, Kevin
Austin, William
Ayala, Polly
Ayers, Douglas
Bailey, Victor
Baker, Barney
Baldwin, Ray
Ball, Kirk
Ballard, Martin
Barker, Heidi
Barnes, Grant
Barnett, Brenda
Bartlett, Julia
Barton, Barry
Bass, Justin

Step 53: Define Name "Metric 1"

The screenshot shows the Microsoft Excel interface with the 'Formulas' ribbon selected. The 'Define Name' button is highlighted with a green box. A 'New Name' dialog box is open, with the following details:

- Name: Metric1
- Scope: Workbook
- Refers to: ='Dynamic Dashboard!\$AL\$11'

The background spreadsheet displays data for 'Adams, David' from 2015 to 2020, including a table and a chart. The 'AVG' column values are 0.235, 0.317, 0.270, 0.238, 0.250, and 0.287. The 'Total' row shows 605, 161, 0.266, 65, 24, and 2. A green arrow points from the 'Define Name' button to the 'New Name' dialog box.

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Con
2015	102	24	0.235	13	3	0
2016	101	32	0.317	17	6	0
2017	100	27	0.270	9	2	0
2018	101	24	0.238	9	4	0
2019	100	25	0.250	6	5	0
2020	101	29	0.287	11	4	2
Total:	605	161	0.266	65	24	2

	Cold Calls	Call Ratio
2015	102	8.5
2016	101	25.3
2017	100	50.0
2018	101	20.2
2019	100	33.3
2020	101	25.3
Total:	605	20.2

Step 54: Write OFFSET function

Excel interface showing the 'Formulas' tab and the 'New Name' dialog box. The dialog box contains the formula: `=OFFSET('Dynamic Dashboard'!S5,0, MATCH('Dynamic Dashboard'!Z15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`. The formula is entered in the 'Refers to:' field.

	Sales	AVG	Demos	Referrals	Inclsd Contrs	Renewals	Warm Leads
2015	102	0.235	13	3	0	2	7
2016	101	0.317	17	6	0	2	8
2017	100	0.270	9	2	0	1	7
2018	101	0.238	9	4	0	4	17
2019	100	0.250	6	5	0	0	5
2020	101	0.287	11	4	2	2	15
Total:	605	0.266	65	24	2	11	59

Formula:
=OFFSET('Dynamic Dashboard'!\$S\$5,0, MATCH('Dynamic Dashboard'!\$Z\$15,'Dynamic Dashboard'!\$S\$4:\$AF\$4,0)-1,6,1)

Description:
Write =OFFSET function, Open Parenthesis, Starting Cell is going to be the cell S5, Select Cell B3, Press Comma (,). Number of rows we want to shift from starting point is 0, because the first data point should 2010 data point, type 0, press comma(,).

Step 55: Write MATCH Function

The screenshot shows the Excel interface with the 'Formulas' tab active. The 'New Name' dialog box is open, and the 'Refers to' field contains the formula: `=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!Z15, 'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`. The dialog box also shows the name 'Metric1' and the workbook 'Workbook'. The background shows a data table and two charts.

	Cold Calls	Sales	AVG	Demos
Select: Adams, David				
2015	102	24	0.235	13
2016	101	32	0.317	17
2017	100	27	0.270	9
2018	101	24	0.238	9
2019	100	25	0.250	6
2020	101	29	0.287	11
Total:	605	161	0.266	65

Charts shown in the background:

- Line chart: Sales (left axis, 0-35) and AVG (right axis, 0.000-0.350) from 2015 to 2020. The 2020 AVG value is 0.287.
- Bar chart: Cold Calls (left axis, 100-103) and Demos (right axis, 8-18) from 2015 to 2020. The 2020 Demos value is 15.

Formula:
`=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!Z15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`

Description:
Write MATCH function (the user entered the cell Z15), Open Parenthesis, Select Cell Z15, Press Comma (,).

Step 56: Write MATCH Function

The screenshot shows the Excel interface with the 'Formulas' tab selected. The 'Function Library' includes 'Insert Function', 'AutoSum', 'Recently Used', 'Financial', 'Logical', 'Text', 'Date & Time', 'Lookup & Reference', 'Math & Trig', and 'More Functions'. The 'Defined Names' section shows 'Name Manager', 'Use in Formula', and 'Create from Selection'. The 'Formula' section shows 'Trace Precedents', 'Trace Dependents', and 'Remove Arrows'.

The data table for 'Adams, David' is as follows:

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	15	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

The 'New Name' dialog box is open, showing the following details:

- Name: Metric1
- Scope: Workbook
- Comment: (empty)
- Refers to: =OFFSET('Dynamic Dashboard'!\$\$\$5,0,MATCH('Dynamic Dashboard'!\$Z\$15,'Dynamic Dashboard'!\$\$\$4:\$AF\$4,0)-1,6,1)

Formula:
=OFFSET('Dynamic Dashboard'!\$\$\$5,0,MATCH('Dynamic Dashboard'!\$Z\$15,'Dynamic Dashboard'!\$\$\$4:\$AF\$4,0)-1,6,1)

Description:
(Continues) Select cells S4:AF4, which going to be the array of selected cell (Z15). Press Comma (,). Type zero (0) for exact match. Close parentheses. Press Comma (,).

Step 57: Continue OFFSET & MATCH Function

Excel interface showing the 'Formulas' tab and the 'Function Library' group. The active cell is AL11. The data table below shows performance metrics for 'Adams, David' from 2015 to 2020. A chart displays 'Sales' data for the years 2015-2018. The 'New Name' dialog box is open, showing the formula: `=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!Z15,'Dynamic Dashboard'!S4:AF4,0),-1,6,1)`. The 'OK' button is highlighted.

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Call	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Formula:

`=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!Z15,'Dynamic Dashboard'!S4:AF4,0),-1,6,1)`

Description:

We subtract one (-1), press - 1, it doesn't allow to move to next column. Press comma (,). The height of the resulting array is 6 data point for each year, so the height is going to be 6, press 6. The width is going to be 1 column line, press 1. Close parentheses. Press OK.

Step 58: Define Name "Metric 2"

The screenshot shows the Microsoft Excel interface with the 'Formulas' ribbon selected. The 'Define Name' button is highlighted with a green box. A 'New Name' dialog box is open, with the 'Name' field set to 'Metric2' and the 'Scope' set to 'Workbook'. A green arrow points from the 'Formulas' ribbon to the dialog box. In the background, a table shows data for 'Adams, David' from 2015 to 2020, and two charts are displayed: a bar chart for 'Sales' and a combination bar and line chart for 'Cold Calls' and 'arm Leads'.

	Cold Calls	Sales	AVG
2015	102	24	0.235
2016	101	32	0.317
2017	100	27	0.270
2018	101	24	0.238
2019	100	25	0.250
2020	101	29	0.287
Total:	605	161	0.266

Select metric 1: Demos **Select metric 2: Sales**

Step 59: Write OFFSET function

The screenshot shows the Microsoft Excel interface with the 'Formulas' ribbon selected. The active cell is AA37. A table for 'Adams, David' is visible, with columns for Sales, AVG, Demos, Referrals, etc. A bar chart below the table shows 'Sales' from 2015 to 2018. A 'New Name' dialog box is open, with the 'Refers to:' field containing the formula: `=OFFSET('Dynamic Dashboard'!S5,0, MATCH('Dynamic Dashboard'!AC15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`. A green arrow points from the 'Refers to:' field to the 'Sales' column header in the table.

	Sales	AVG	Demos	Referrals	Inclsd Contrs	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Formula:
=OFFSET('Dynamic Dashboard'!\$S\$5,0, MATCH('Dynamic Dashboard'!\$AC\$15,'Dynamic Dashboard'!\$S\$4:\$AF\$4,0)-1,6,1)

Description:
Write =OFFSET function, Open Parenthesis, Starting Cell is going to be the cell S5, Select Cell B3, Press Comma (,). Number of rows we want to shift from starting point is 0, because the first data point should 2010 data point, type 0, press comma(,).

Step 60: Write MATCH Function

6. Dynamic Dashboard Pr... Search

File Home Insert Page Layout **Formulas** Data Review View Developer Help

Function Library: Insert Function, AutoSum, Recently Used, Financial, Logical, Text, Date & Time, Lookup & Reference, Math & Trig, More Functions, Name Manager, Define Name, Use in Formula, Create from Selection, Defined Names, Trace Precedents, Trace Dependents, Remove Arrows, Formula

AA37

Select: **Adams, David**

	Cold Calls	Sales	AVG	Demos	Referrals	hclsd Contr	Renewals	Warm Leads	Service Ess	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	50%	30	605	20.2	

Select metric 1: Demos Select metric: **Sales**

New Name dialog box:
Name: Metric2
Type: Workbook
Refers to: =OFFSET('Dynamic Dashboard'!\$S\$5,0,MATCH('Dynamic Dashboard'!\$AC\$15,'Dynamic Dashboard'!\$S\$4:\$AF\$4,0)-1,6,1)

Formula:
=OFFSET('Dynamic Dashboard'!\$S\$5,0,MATCH('Dynamic Dashboard'!\$AC\$15,'Dynamic Dashboard'!\$S\$4:\$AF\$4,0)-1,6,1)

Description:
Write MATCH function (the user entered the cell AC15), Open Parenthesis, Select Cell Z15, Press Comma (,).

Step 61: Write MATCH Function

The screenshot shows the Microsoft Excel interface. The 'Formulas' ribbon is active, and the 'Function Library' group is visible. The active cell is AA37. A data table for 'Adams, David' is displayed, with columns for various metrics and rows for years 2015-2020. A bar chart is also visible, showing sales data from 2015 to 2018. A 'New Name' dialog box is open, with the 'Name' field set to 'Metric2' and the 'Refers to' field containing the formula: `=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!AC15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`. A green arrow points from the 'Refers to' field to the 'Dynamic Dashboard' text in the dialog box.

	Cold Calls	Sales	AVG	Demos	Referrals	Clsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	15	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Formula:
`=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!AC15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`

Description:
(Continues) Select cells S4:AF4, which going to be the array of selected cell (Z15). Press Comma (,). Type zero (0) for exact match. Close parentheses. Press Comma (,).

Step 62: Continue OFFSET & MATCH Function

Excel interface showing the 'Formulas' tab and the 'Function Library' group. The formula bar displays the formula: `=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!AC15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`.

The spreadsheet displays data for 'Adams, David' across various metrics (Cold Calls, Sales, AVG, Demos, Referrals, etc.) for the years 2015 to 2020. A bar chart is visible below the table, showing Sales data for the years 2015 to 2018. The 'New Name' dialog box is open, showing the formula entered in the 'Refers to' field.

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Formula:

`=OFFSET('Dynamic Dashboard'!S5,0,MATCH('Dynamic Dashboard'!AC15,'Dynamic Dashboard'!S4:AF4,0)-1,6,1)`

Description:

We subtract one (-1), press -1, it doesn't allow to move to next column. Press comma (,). The height of the resulting array is 6 data point for each year, so the height is going to be 6, press 6. The width is going to be 1 column line, press 1. Close parentheses. Press OK.

Step 63: Click Chart, Select Data

The screenshot shows the Microsoft Excel interface with the following elements:

- Formula Bar:** Contains the formula `=SERIES('Dynamic Dashboard'!$$$4,'Dynamic Dashboard'!R5:R10,'Dynamic Dashboard'!$$$5:$$$10,1)`.
- Table:** A table with columns: Cold Calls, Sales, AVG, Demos, Referrals, Inclsd Contr, Renewals, Warm Leads, Service Es, Quality Iss, Defect Rate, Closed Calls, Cold Calls, Call Ratio. Rows include years 2015-2020 and a Total row.
- Chart:** A combination bar and line chart. The bar chart shows Sales (blue bars) and the line chart shows AVG (orange line with diamond markers). The chart is titled 'Dynamic Dashboard'.
- Context Menu:** A right-click context menu is open over the chart. The 'Select Data...' option is highlighted with a green box. A green arrow points from the 'AVG' data point in the table to this menu option.

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	12	102	8.5		4	101	25.3
2016	101	32	0.317	17	6	2	1	2	100	50.0		2	100	20.2
2017	100	27	0.270	9	2	1	4	3	100	33.3		3	100	33.3
2018	101	24	0.238	9	4	0	1	4	100	25.3		4	101	25.3
2019	100	25	0.250	6	5	0	1	3	100			30	605	20.2
2020	101	29	0.287	11	4	2	1	4	101					
Total:	605	161	0.266	65	24	2	1	30	605	20.2				

Step 64: Check The Box, Edit Vertical Axis

Microsoft Excel interface showing the 'Formulas' ribbon and a 'Select Data Source' dialog box. The dialog box is used to edit the chart's vertical axis labels.

Excel Ribbon: Formulas

- Function Library: Insert Function, AutoSum, Recently Used, Financial, Logical, Text, Date & Time, Lookup & Reference, Math & Trig, More Functions
- Defined Names: Name Manager, Define Name, Use in Formula, Create from Selection
- Formula Auditing: Trace Precedents, Trace Dependents, Remove Arrows, Show Formulas, Error Checking, Evaluate Formula
- Calculation: Watch Window, Calculation Options

Worksheet Data:

	Cold Calls	Sales	AVG	Demos	Referrals	Unclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	0	0	0	-	0	0	0
2020	101	29	0.287	11	4	0	0	0	0	0	-	0	0	0
Total:	605	161	0.266	65										

Select Data Source Dialog Box:

- Chart data range: `= 'Dynamic Dashboard'!R4:S10, 'Dynamic Dashboard'!Z4:Z10`
- Legend Entries (Series):
 - Cold Calls
 - Warm Leads
- Horizontal (Category) Axis Labels:
 - 2015
 - 2016
 - 2017
 - 2018
 - 2019

Chart Preview: A bar chart showing Sales (2015-2020) with a line series for AVG. The vertical axis is labeled 'Sales' and the horizontal axis is labeled 'Dynamic Dashboard'.

Step 65: After !, Text "Metric1", Press OK

Microsoft Excel interface showing a dynamic dashboard with a data table and charts. The 'Formulas' ribbon is active, and the 'Edit Series' dialog box is open, showing the formula for the 'Cold Calls' series being updated to include a dynamic metric.

Table Data:

	Cold Calls	Sales	AVG	Demos	Referrals	ncldsd Contra	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24		11	59	5	5	50%	30	605	20.2

Chart Data (Sales and AVG):

Year	Sales	AVG
2015	24	0.235
2016	32	0.317
2017	27	0.270
2018	24	0.238
2019	25	0.250
2020	29	0.287

Chart Data (Cold Calls and Warm Leads):

Year	Cold Calls	Warm Leads
2015	102	7
2016	101	8
2017	100	7
2018	101	17
2019	100	5
2020	101	15

Edit Series Dialog Box:

Series name: `= 'Dynamic Dashboard'!S4` = Cold Calls

Series values: `= 'Dynamic Dashboard'!Metric1` = 102, 101, 100,...

Step 66: Check The Box, Edit Vertical Axis

The screenshot shows the Microsoft Excel interface with the 'Formulas' ribbon selected. The active cell is V5. A data table is visible in the background, and a chart is displayed below it. The 'Select Data Source' dialog box is open, showing the 'Legend Entries (Series)' list with 'Warm Leads' selected. The 'Horizontal (Category) Axis Labels' list contains the years 2015 through 2019. A green arrow points to the 'Edit' button for the 'Warm Leads' series. The vertical axis of the chart is highlighted with a green box.

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contre	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	0	0	0	-	0	0	0
2020	101	29	0.287	11	4	0	0	0	0	0	-	0	0	0
Total:	605	161	0.266	65	2	0	0	0	0	0	-	0	0	0

Dynamic Dashboard | Blank

Step 67: After !, Text "Metric2", Press OK

The screenshot shows the Microsoft Excel interface with the 'Formulas' ribbon selected. The active cell is T5. A data table is displayed with columns for various metrics and rows for years 2015-2020. A chart is visible below the table, and a dialog box is open for editing a series name. The dialog box shows the series name as '=Dynamic Dashboard!\$Z\$4' and the series values as '=Dynamic Dashboard!Metric2'. A green arrow points to the 'Metric2' text in the series values field, which is also highlighted with a green box. The dialog box has 'OK' and 'Cancel' buttons.

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contr	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Step 69: Completed

Microsoft Excel interface showing a dynamic dashboard for 'Adams, David'.

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S2 Adams, David

	Cold Calls	Sales	AVG	Demos	Referrals	Inclsd Contra	Renewals	Warm Leads	Service Es	Quality Iss	Defect Rate	Closed Calls	Cold Calls	Call Ratio
2015	102	24	0.235	13	3	0	2	7	0	0	-	12	102	8.5
2016	101	32	0.317	17	6	0	2	8	4	2	67%	4	101	25.3
2017	100	27	0.270	9	2	0	1	7	0	2	0%	2	100	50.0
2018	101	24	0.238	9	4	0	4	17	0	0	-	5	101	20.2
2019	100	25	0.250	6	5	0	0	5	1	1	50%	3	100	33.3
2020	101	29	0.287	11	4	2	2	15	0	0	-	4	101	25.3
Total:	605	161	0.266	65	24	2	11	59	5	5	50%	30	605	20.2

Select: Adams, David

Select metric 1: Demos Select metric 2: Sales

Dynamic Dashboard Blank