

Assignment 1: Sales Summary Spreadsheet

Spreadsheet Modeling & Business Analytics — Student Assignment Sheet

Objective & Overview

In this assignment, you will construct a structured financial summary spreadsheet in Google Sheets to track team sales revenue. You will enter raw daily sales data for three sales representatives, calculate daily volume using row sums with `=SUM()`, calculate individual performance using column sums with `=SUM()`, verify overall mathematical balance, apply professional currency formatting, and generate a visual chart to communicate revenue distribution.

1. Assignment Data Table

Set up your spreadsheet in Google Sheets starting in cell **A1** exactly as structured below. Leave cells in column E and row 8 empty initially — you will compute those values using formulas in Section 2.

Row	A (Date)	B (Alice)	C (Bob)	D (Charlie)	E (Daily Total)
1	Date	Alice	Bob	Charlie	Daily Total
2	2026-08-01	300	350	500	[Calculate]
3	2026-08-02	400	240	630	[Calculate]
4	2026-08-03	250	600	700	[Calculate]
5	2026-08-04	770	320	315	[Calculate]
6	2026-08-05	400	350	560	[Calculate]
7	2026-08-06	335	525	380	[Calculate]
8	Total Sales	[Calculate]	[Calculate]	[Calculate]	[Grand Total]

2. Step-by-Step Instructions for Students

- Step 1: Create and Name Your Sheet**
Open Google Sheets, create a blank spreadsheet, and rename it to Sales Summary in the top-left corner. Enter the table headers in Row 1 and dates/numerical sales figures in cells A2:D7.
- Step 2: Calculate Daily Volume (Row Sums)**
In cell **E2**, enter the formula to sum daily sales across all three representatives: `=SUM(B2:D2)`. Press Enter. Click the bottom-right fill handle of cell E2 and drag it down through cell **E7** to populate daily totals.
- Step 3: Calculate Representative Totals (Column Sums)**
In cell **A8**, enter the label **Total Sales**. In cell **B8**, calculate Alice's total sales using `=SUM(B2:B7)`. Click the fill handle of cell B8 and drag horizontally across to cell **D8** to automatically calculate Bob's and Charlie's

totals.

- **Step 4: Calculate the Overall Grand Total & Verify Data Integrity**
In cell **E8**, enter =SUM(E2:E7) to calculate cumulative revenue from the daily totals.
Verification Self-Check: Confirm your balance by verifying that summing individual column totals (=SUM(B8:D8)) yields the exact same grand total.
- **Step 5: Apply Professional Formatting**
 1. Format dates in cells A2:A7 as **Format** → **Number** → **Date**.
 2. Highlight all numerical sales figures in range B2:E8 and click **Format** → **Number** → **Currency** (or click the \$ icon on the toolbar). Ensure values display two decimal places.
- **Step 6: Insert a Comparison Chart**
Select the representatives' names and their total sales (hold Ctrl/Cmd to select range B1:D1 and B8:D8). Click **Insert** → **Chart**, choose a **Column chart**, and title it Salesperson Performance Summary.

3. Submission Checklist & Rubric (20 Points Total)

Before submitting your Google Sheet, verify that your work satisfies all criteria below:

Criteria	Description	Points
Data & Headers	Correct setup of headers A1:E1, dates A2:A7, and raw sales data B2:D7.	4 pts
Formulas & Modeling	Accurate use of =SUM() for row totals (E2:E7) and column totals (B8:D8).	5 pts
Grand Total Balance	Grand total in cell E8 calculated correctly with verified cross-balance.	4 pts
Formatting	Proper currency formatting (\$) applied to B2:E8; date formatting on A2:A7.	4 pts
Data Visualization	Clear column chart included comparing representative sales totals.	3 pts