Spreadsheet Skills Workshop

Building a Multi-Sheet Stock, Sales & Revenue Tracker

Name_____:

This brief is mainly about DESIGN of the interlinked sheets.

What You Will Learn

- Create and link multiple worksheets
- Enter and format data correctly
- Write SUM, IF and VLOOKUP formulas
- Use absolute cell references ($)
- Create charts from your data
- Test and troubleshoot your model

The Brief

You have been asked to help **TechBit** — a small shop that sells computer accessories. The manager wants a spreadsheet model that tracks:

- What stock they have
- What they have sold
- How much money they have made
- Which products are running low

Your finished model will have **three linked worksheets:** *Stock List · Sales Record · Revenue Summary*

Using the following data, prepare a spreadsheet that will show all of the data on the appropriate sheet.

Show how you would move between the individual sheets.

At this stage if you are unable to complete the formulae to make it a fully working model this is a less serious issue.

Complete Sections 1-4 at a minimum.

Section 5 could be done as a sketch if you cannot complete the chart.

Section 6 is Extension Activities – attempt these if you feel able.

Do attempt to answer all of the questions.

Section 1: Setting Up Your Workbook

STEP 1

Create your three worksheets

Open a new spreadsheet. At the bottom, you will see a tab called **Sheet1**. Right-click it to rename it.

Create these three sheets (right-click → Insert Sheet or rename):

Sheet 1:
Stock List

Sheet 2:
Sales Record

Sheet 3:
Revenue Summary

Tip

Give sheets clear names — no spaces. Use StockList, SalesRecord, RevenueSummary.

Section 2: The StockList Sheet

This sheet records every product the shop sells, its price, and how many are in stock.

STEP 2

Set up the StockList columns

Click on the **StockList** tab. Type these headings in Row 1 (one per cell):

A1: Product ID	B1: Product Name	C1: Category	D1: Unit Price (£)	E1: Stock Qty	F1: Reorder Level	G1: Stock Status
P001	USB Hub	Accessories	12.99	15	5	*=IF(E2<F2,"⚠ Low","✓ OK")*

STEP 3

Enter TechBit's product data

Add these 6 products into rows 2–7. Type carefully — the formulas on other sheets will use this data!

Product ID	Product Name	Category	Price (£)	Stock Qty	Reorder Level
P001	USB Hub	Accessories	12.99	15	5
P002	Wireless Mouse	Peripherals	24.99	8	3
P003	HDMI Cable 2m	Cables	7.49	22	8
P004	Keyboard	Peripherals	34.99	4	3
P005	Webcam HD	Peripherals	49.99	6	3
P006	Screen Cleaner	Accessories	3.99	30	10

In column G (Stock Status), type this formula in G2 and fill down to G7:

```
=IF(E2<F2,"⚠ Low Stock","✓ OK")
```

Questions — StockList Sheet

Q1. Which product has the lowest stock quantity? _____
Is it below the reorder level? Yes / No

Q2. What does the dollar sign ($) do in a formula? Explain in your own words:

Q3. Change the Stock Qty for **Keyboard (P004)** to 2. What does the Stock Status cell now show? _____
Why does the formula do this automatically?

Section 3: The SalesRecord Sheet

This sheet records every sale made. It will use VLOOKUP to automatically pull the product name and price from the StockList sheet.

STEP 4

Set up the SalesRecord columns

Click the **SalesRecord** tab. Add these headings in Row 1:

A1: Sale ID	B1: Date	C1: Product ID	D1: Product Name	E1: Unit Price (£)	F1: Qty Sold	G1: Revenue (£)

Columns D and E will use formulas to look up data from the StockList:

D2	**=VLOOKUP(C2,StockList!$A:$E,2,FALSE)**	← *looks up product name from StockList column B*
E2	**=VLOOKUP(C2,StockList!$A:$E,4,FALSE)**	← *looks up unit price from StockList column D*
G2	**=E2*F2**	← *price × quantity = revenue*

STEP 5

Enter the sales data

Enter Sale IDs in column A (S001, S002…), dates in column B, and Product IDs in column C. The formulas will fill D, E, and G automatically.

Sale ID	Date	Product ID	Product Name (formula)	Unit Price (formula)	Qty Sold	Revenue (formula)
S001	03/09/2025	P001	← *formula*	← *formula*	3	← *formula*
S002	03/09/2025	P003	← *formula*	← *formula*	5	← *formula*
S003	04/09/2025	P002	← *formula*	← *formula*	1	← *formula*
S004	04/09/2025	P005	← *formula*	← *formula*	2	← *formula*
S005	05/09/2025	P004	← *formula*	← *formula*	1	← *formula*
S006	05/09/2025	P006	← *formula*	← *formula*	8	← *formula*

Questions — SalesRecord Sheet

Q4. Which product generated the most revenue in this sales data? _____ How much? £ _____

Q5. In your VLOOKUP formula for column D, explain what the **2** means:

Q6. Why do we use **$A:$E** with dollar signs in the VLOOKUP? What would go wrong without them?

Section 4: The RevenueSummary Sheet

This sheet pulls together totals from the SalesRecord sheet so the manager can see at a glance how the business is performing.

STEP 6

Build the Revenue Summary

Click the **RevenueSummary** tab. Set up this layout:

Cell	Label / Formula	What it shows
A1	TechBit Revenue Summary	Title (type this as text, make it bold)
A3	Total Sales Transactions	Type as a label
B3	*=COUNTA(SalesRecord!A:A)-1*	Counts how many sales have been made
A4	Total Revenue (£)	Type as a label
B4	*=SUM(SalesRecord!G:G)*	Adds up all revenue from the Sales sheet
A5	Total Units Sold	Type as a label
B5	*=SUM(SalesRecord!F:F)*	Adds up all quantities sold
A6	Average Sale Value (£)	Type as a label
B6	*=B4/B3*	Divides total revenue by number of sales
A8	Products with Low Stock	Type as a label
B8	*=COUNTIF(StockList!G:G,"⚠ Low Stock")*	Counts how many products need reordering

Formatting Tip

Format cells B4 and B6 as currency (£). Right-click → Format Cells → Currency → £ English (UK).

Section 5: Visualising Your Data with a Chart

STEP 7

Create a Revenue by Product bar chart

EITHER

Sketch what your chart will look like

OR

Follow these instructions

Go to your **SalesRecord** sheet. Follow these steps:

1. Select column D (Product Name) and column G (Revenue) — hold Ctrl to select two columns at once.
2. Click **Insert** → **Chart** (or Insert → Recommended Charts).
3. Choose a **Bar Chart (Clustered)** or Column Chart.
4. Give your chart a title: **"Revenue by Product — TechBit"**
5. Label the axes: X axis = Product Name, Y axis = Revenue (£).
6. Move your chart to the RevenueSummary sheet (right-click chart → Move Chart).

Chart Question

Q7. Looking at your chart, which product generated the most revenue? Why might this be? (Think about price and quantity sold.)

Section 6: Extension Tasks ★

Completed everything above? Challenge yourself with these extensions!

★ Extension 1

Add a **Profit column** to the StockList. Assume each produ
profit per unit.

Hint: Profit = Price × 0.4

★ Extension 2

Add a **Monthly Sales Summary** section to RevenueSur
product code.

★ Extension 3

Apply **Conditional Formatting** to the Stock Qty column on Stockl
reorder level turn red automatically.

★ Extension 4

Create a **Pie Chart** on RevenueSummary showing the

Formula Reference Card

Formula	What it does	Example
=SUM(B2:B10)	Adds up a range of cells	*=SUM(D2:D20) → total units sold*
=C2*D2	Multiplies two cells together	*=C2*D2 → price × qty = revenue*
=IF(B2<5,"Low","OK")	Shows a message based on a condition	*If stock < 5 show "Low", else "OK"*
=VLOOKUP(A2,StockList!A:C,2,FALSE)	Looks up a value from another sheet	*Find the price of the product in A2*
=SUM(Sales!E:E)	Adds a whole column from another sheet	*Total of column E on the Sales sheet*
=B1*C2	$ locks a cell so it doesn't change when copied	*Always use the VAT rate in B1*