

# **TITLE OF THE REPORT**

## **Comparison of Region Based on Sales**

### **TABLE OF CONTENTS**

1. Problem Statement
2. Objectives
3. Prerequisites
4. Industry Relevance
5. Tasks to Perform

## 1.0 Problem Statement

The director of a leading organization wants to compare the sales between two regions. He has asked each region operators to record the sales data to compare by region. The upper management wants to visualize the sales data using a dashboard to understand the performance between them and suggest the necessary improvements.

## 2.0 Objectives

- Create a dashboard to visualize the sales comparison between two selected regions

## 3.0 Prerequisites

- Hierarchy
- Parameters
- Calculated fields
- Dashboard

## 4.0 Industry Relevance

- **Hierarchy:** It represents the level-wise configuration.
- **Parameters:** It is a workbook variable such as a number, date, or string that can replace a constant value in a calculation, filter, or reference line.
- **Calculated fields:** It creates new dimensions, such as segments, or new measures, such as ratios or sums.
- **Dashboard:** It displays several views and compares a variety of data simultaneously.

## 5.0 Tasks to Perform

Perform the below tasks on the dataset provided using Tableau

### 1.0 Select Sample Superstore as Dataset

- Use Sample Superstore Dataset
- Select Data
- Use Group by from Data Source Table on a Folder to create a folder to segregate the required data

### 2.0 Create a hierarchy called Location

Perform the below tasks on the dataset provided using Tableau

### 3.0 Create two parameters: Primary Region and Secondary Region with all regions listed in them.

- Create Parameters for Primary Region and Secondary Region
- Create a Calculated Field for both Primary Region and Secondary Region

### 4.0 Create a First Order Date

- Create a Calculated Field and name it as the First Order Date

### 5.0 Create a u all sheets in the dashboard

- Align all sheets in the dashboard

### 6.0 Partition the dashboard to display the below details of Primary Region and Secondary Region

- First Order Date
- Total Sales
- Average Sales per Order

- No. of Customers
- No. of Orders
- No. of Products in Sale

Name	Date modified	Type	Size
Sample - Superstore	01/09/2024 1:00 pm	Microsoft Excel 97...	3,286 KB

File name:  Excel Workbooks (\*.xls \*.xlsx \*.xl) 

Open Cancel

Tableau Public Desktop

Connections

Sample - Superstore

Sheets

Orders

People

Returns

New Union

New Table Extension

Orders+ (Sample - Superstore)

Orders

People

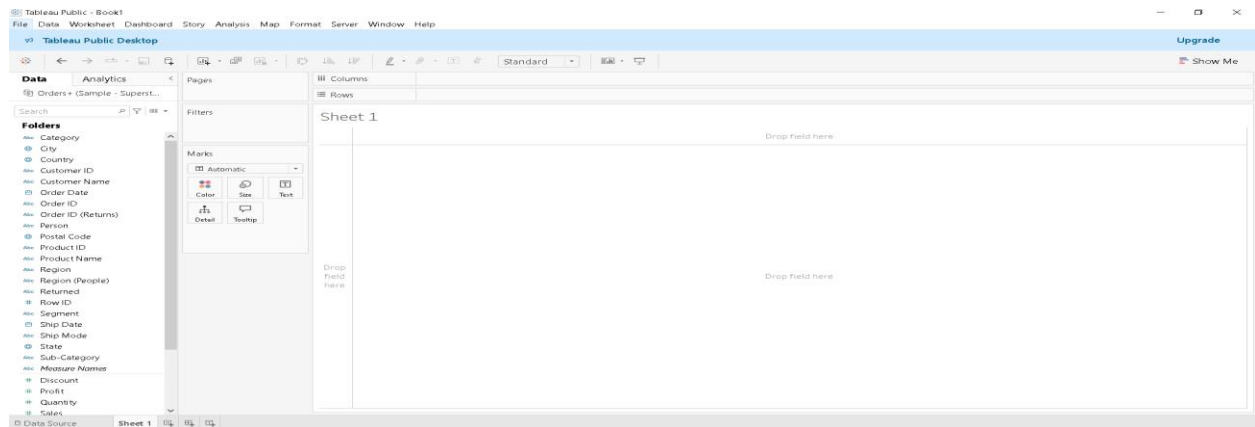
Returns

21 fields 9994 rows

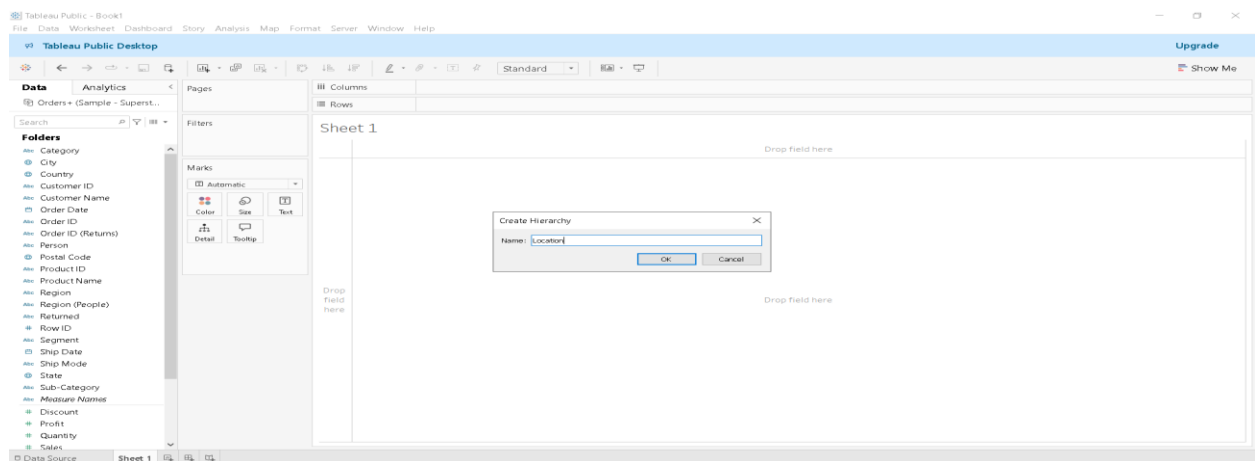
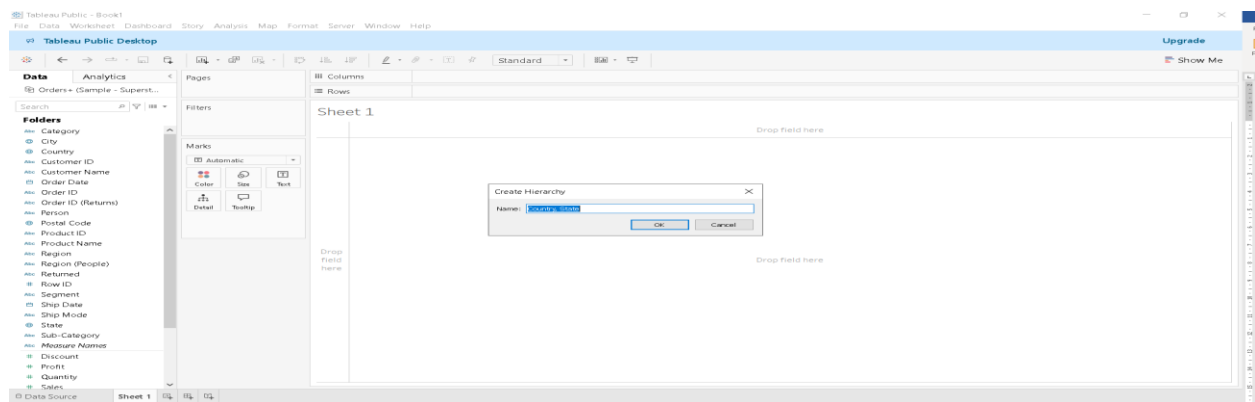
Fields

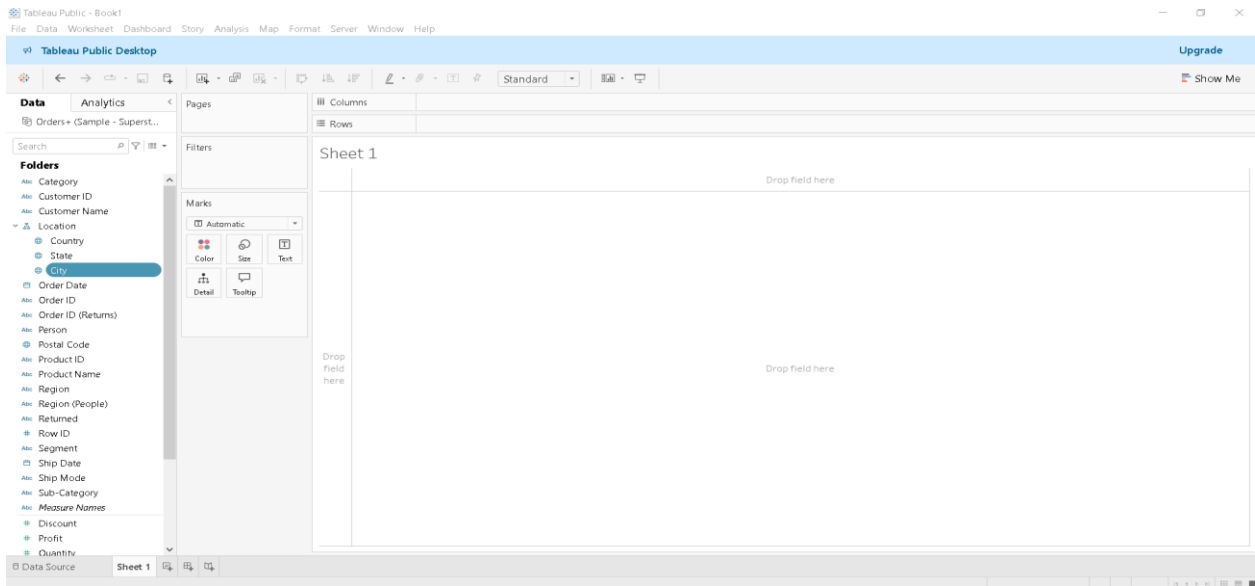
Type	Field Name	Physical Table	Remote F...
Alt	Row ID	Orders	Row ID
Alt	Order ID	Orders	Order ID

Alt Orders Row ID	Alt Orders Order ID	Alt Orders Order Date	Alt Orders Ship Date	Alt Orders Ship Mode	Alt Orders Customer ID	Alt Orders Customer Name
1	CA-2015-152155	08/11/2015	11/11/2015	Second Class	CG-12520	Claire Gule
2	CA-2015-152155	08/11/2015	11/11/2015	Second Class	CG-12520	Claire Gule
3	CA-2015-138588	12/05/2015	16/05/2015	Second Class	DV-13045	Darrin Von Huff
4	US-2015-108955	11/10/2015	16/10/2015	Standard Class	SO-20335	Sean O'Donnell
5	US-2015-108955	11/10/2015	16/10/2015	Standard Class	SO-20335	Sean O'Donnell
6	CA-2014-115812	09/05/2014	14/06/2014	Standard Class	BH-11710	Brosina Hoffman



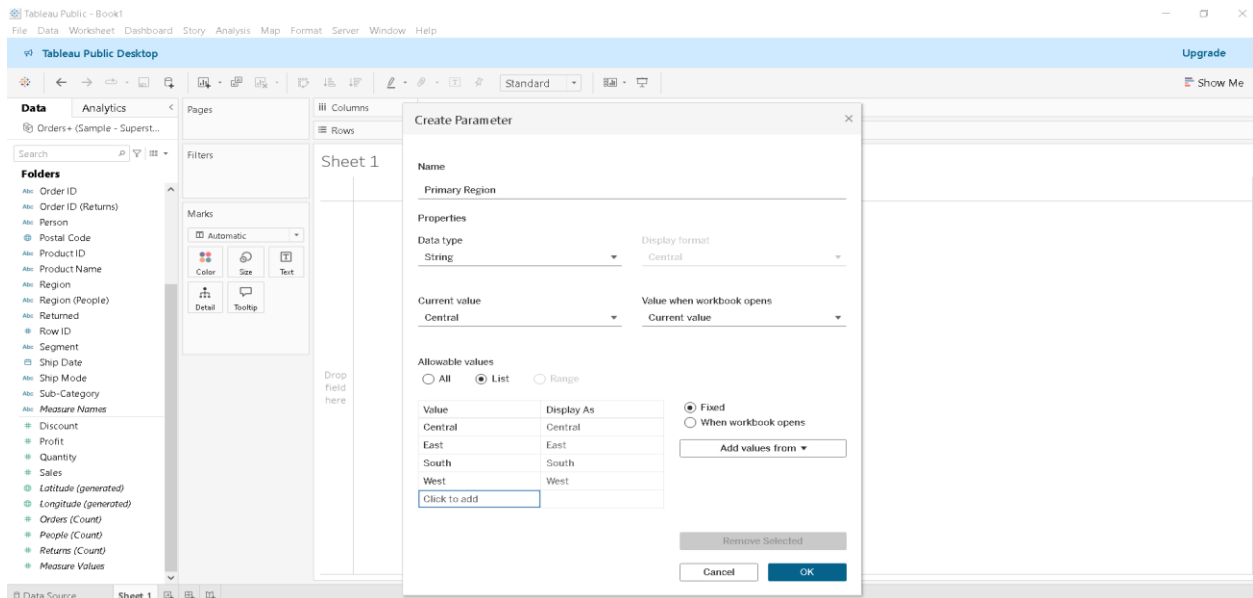
## 5.1 Create a hierarchy called Location

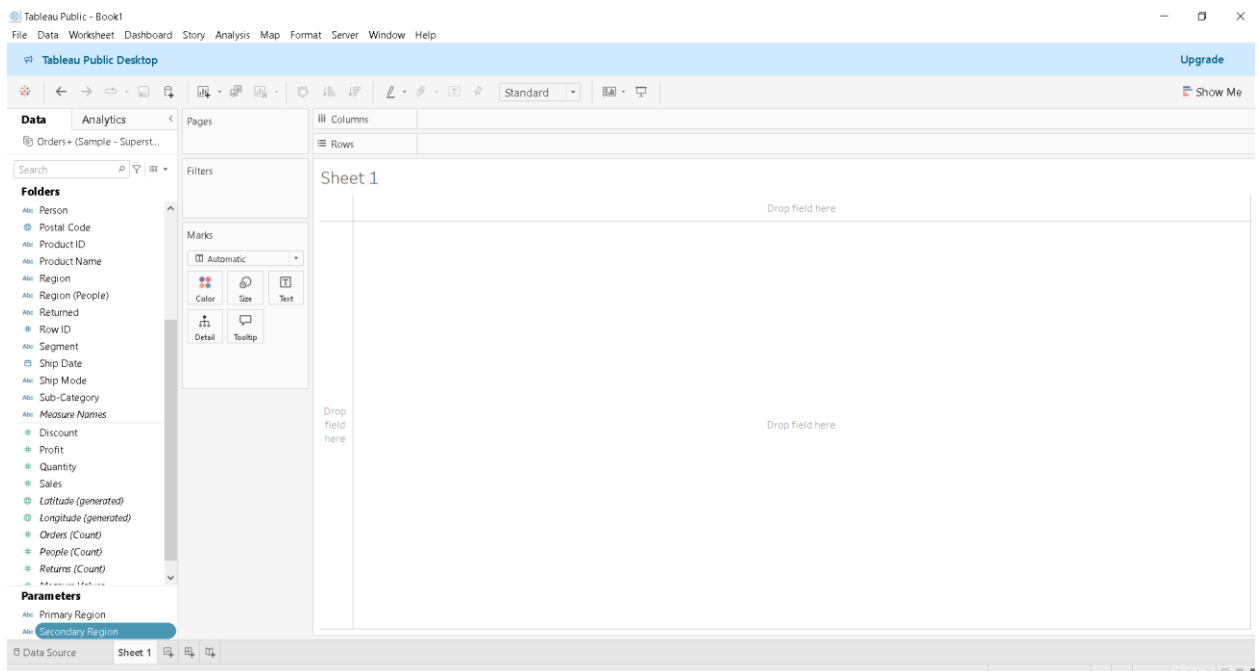
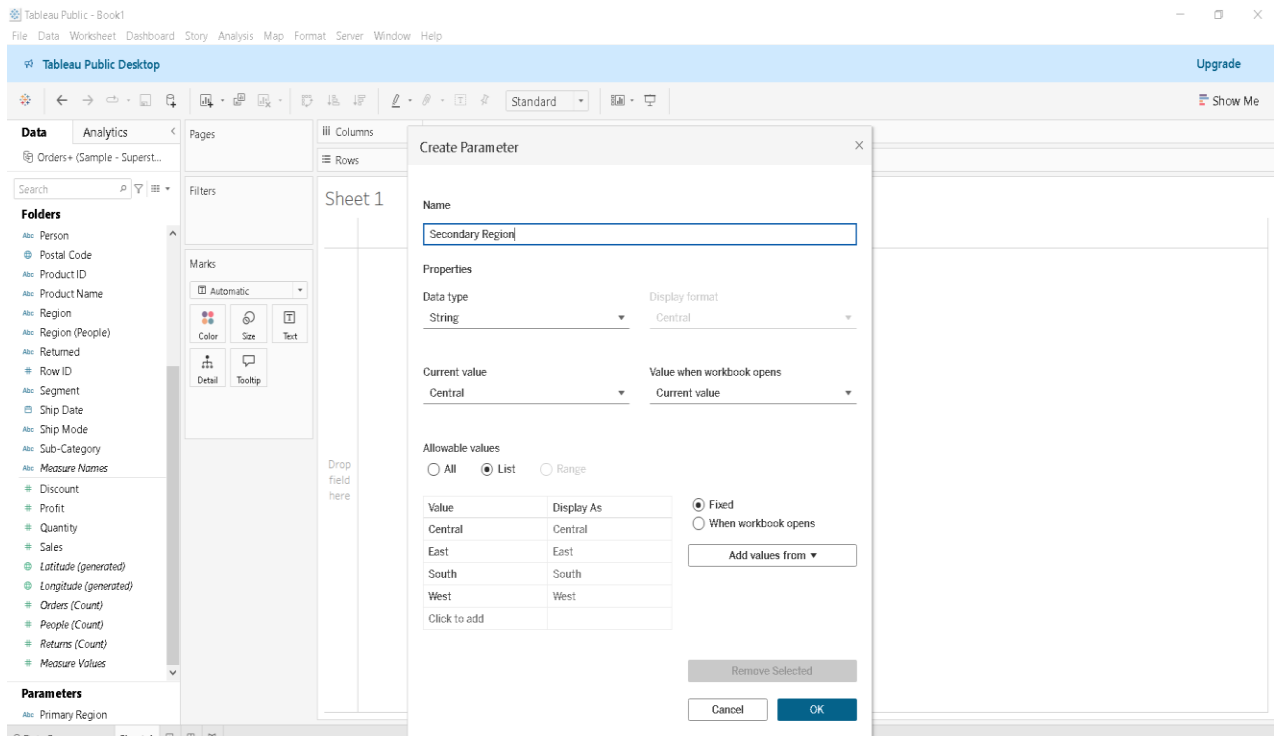




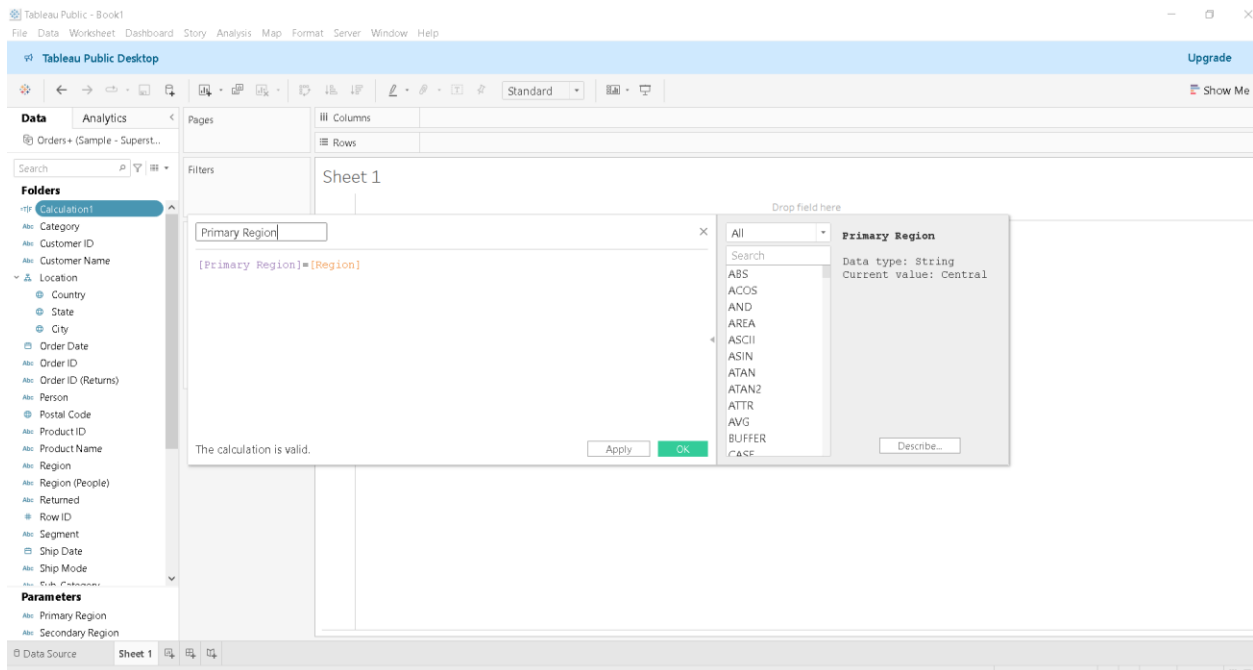
### 5.3 Create two parameters: Primary Region and Secondary Region with all regions listed in them.

- Create Parameters for Primary Region and Secondary Region

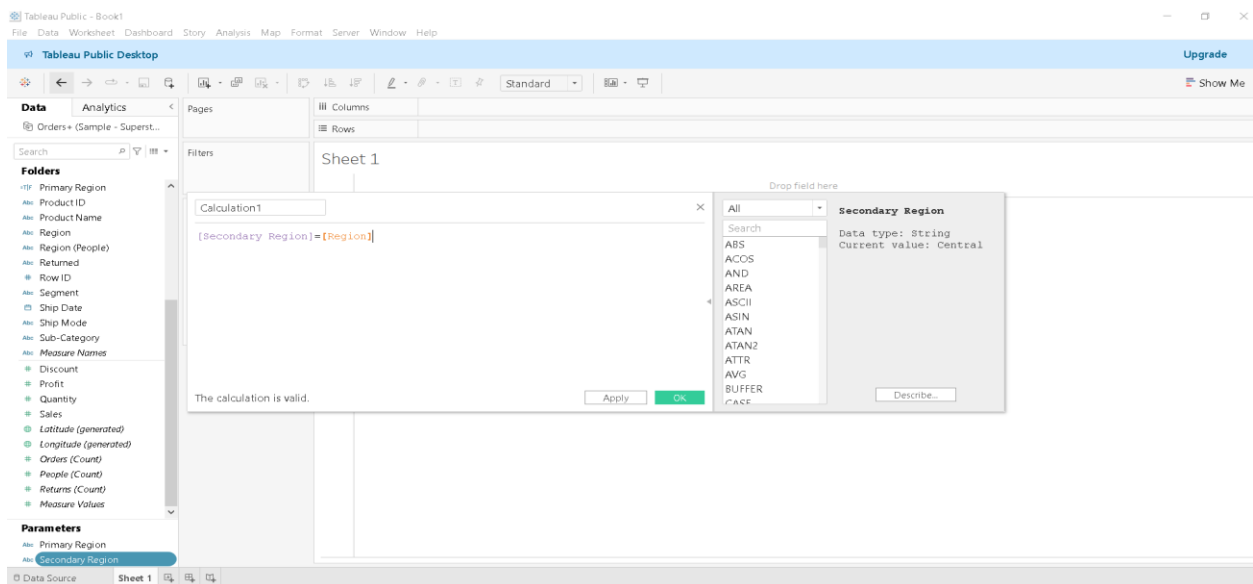




- Create a Calculated Field for both Primary Region and Secondary Region
  - a. Primary region calculated Field

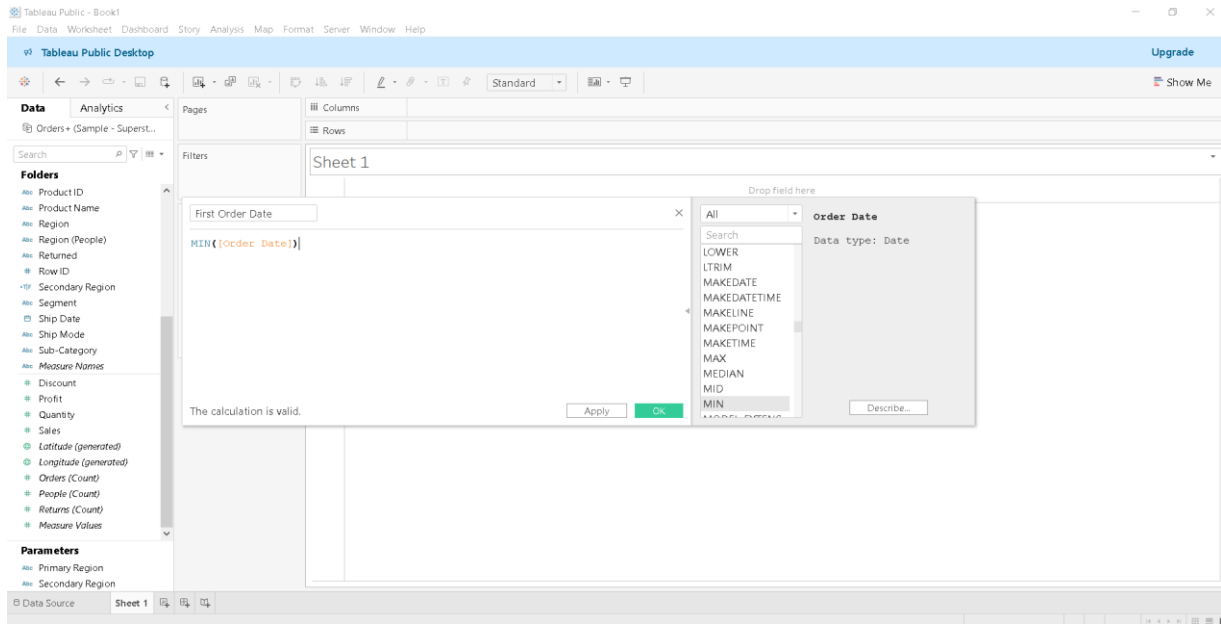


b. Secondary region calculated field:



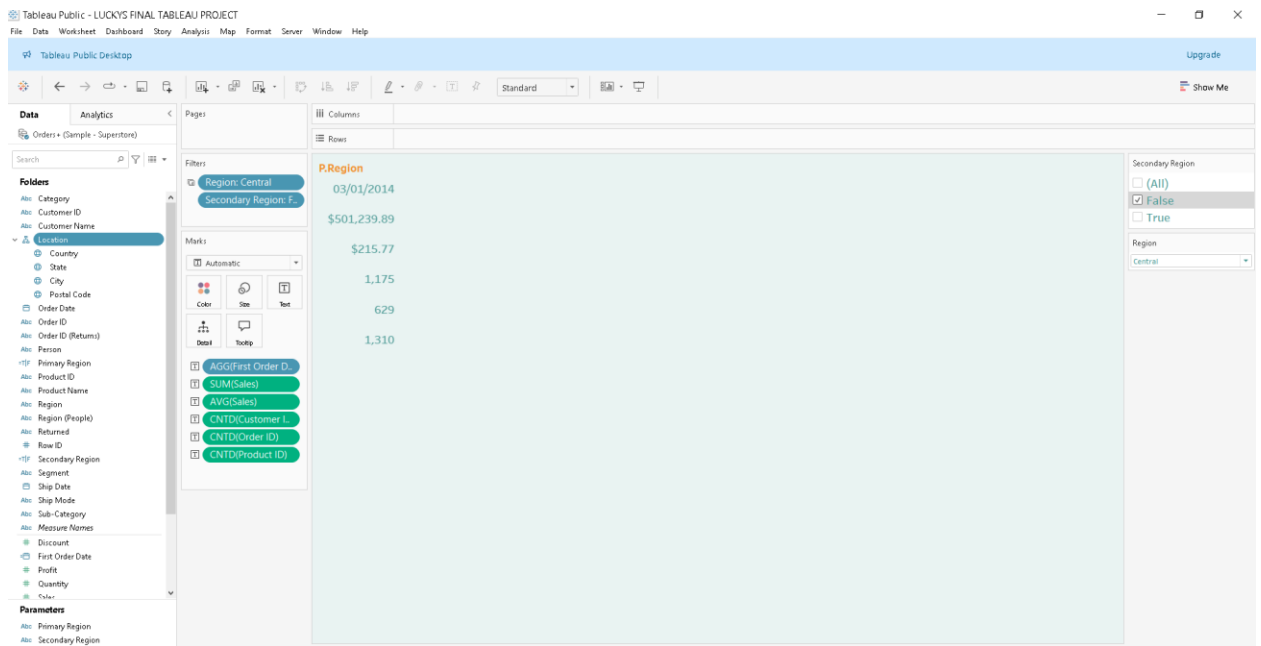
## 4.0 Create a First Order Date

- Create a Calculated Field and name it as the First Order Date

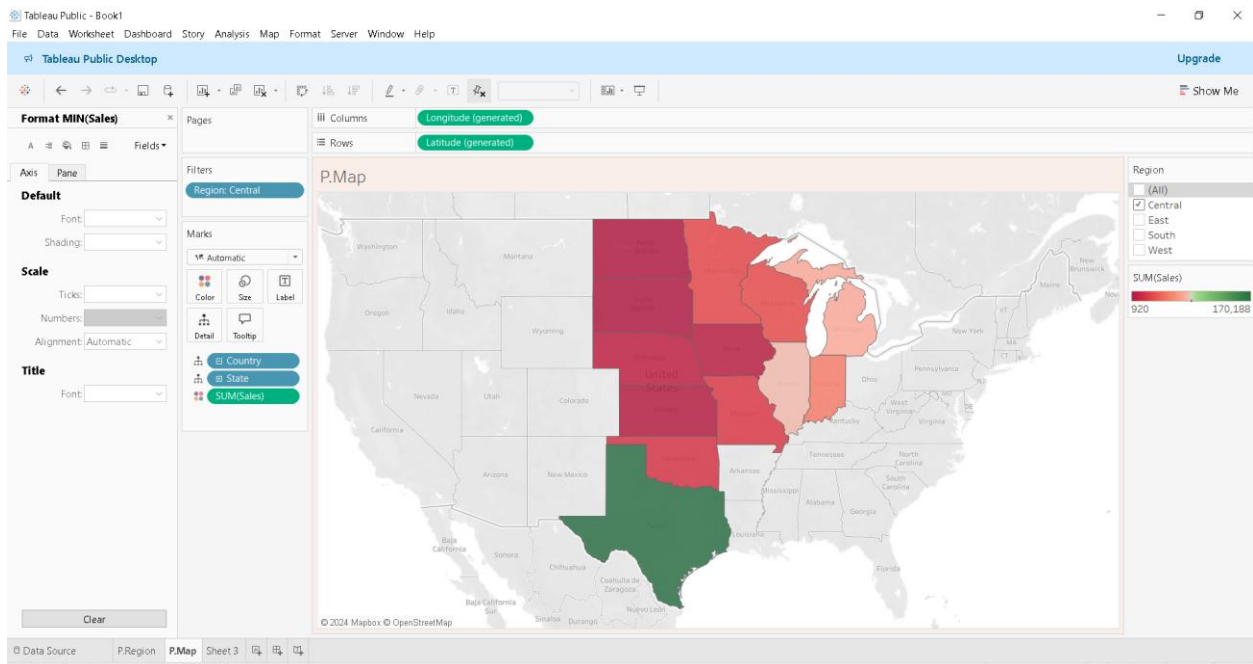


## 5.0 Create a all sheets in the dashboard

- Align all sheets in the dashboard







Filter [Measure Names]

General

Enter search text:

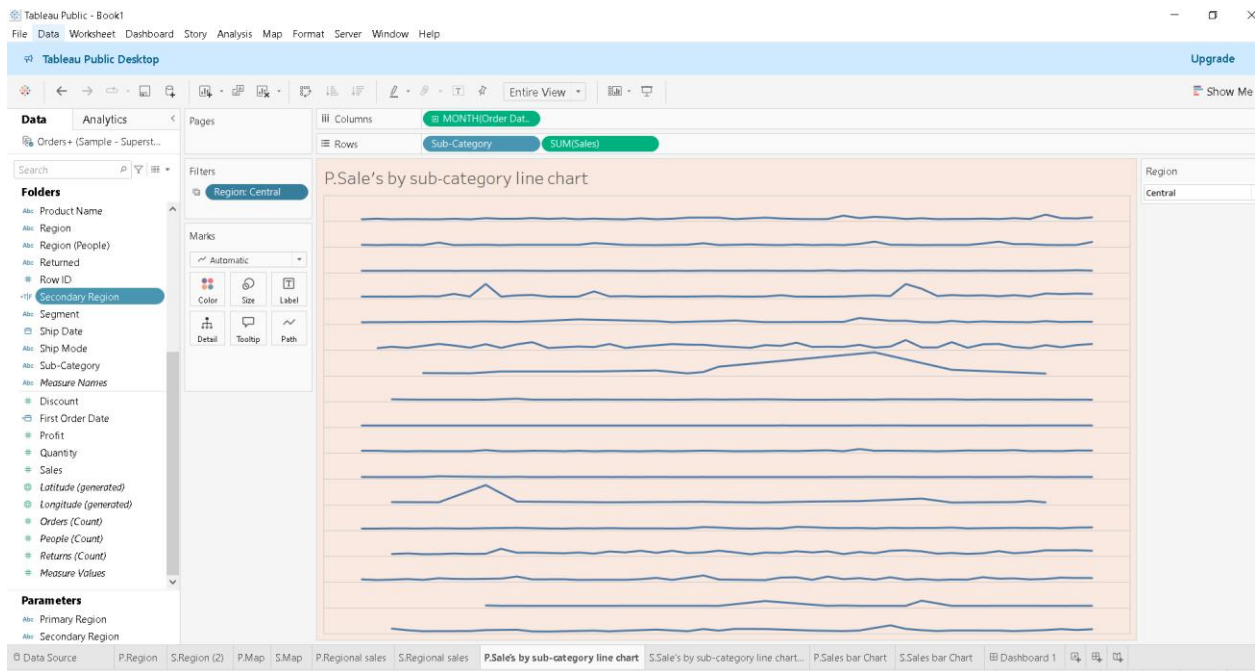
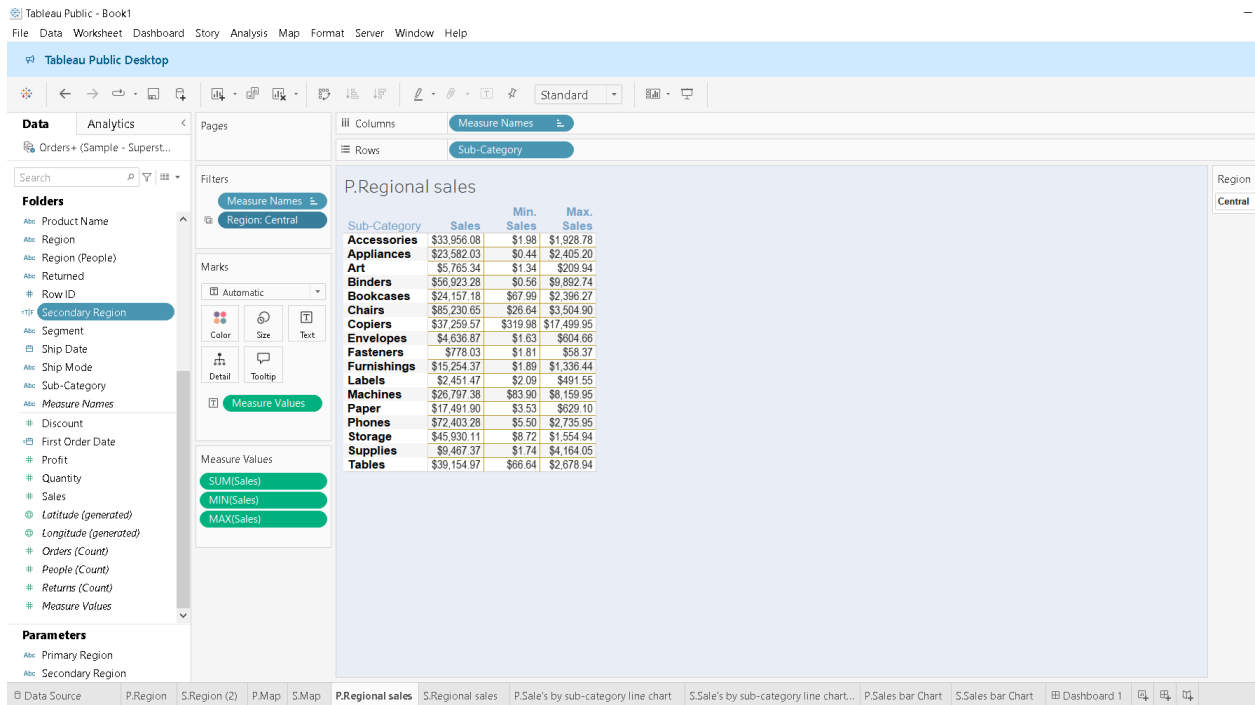
- ☐ Count of Orders
- ☐ Count of People
- ☐ Count of Returns
- ☐ Discount
- ☒ Max. Sales
- ☒ Min. Sales
- ☐ Profit
- ☐ Quantity
- ☒ Sales

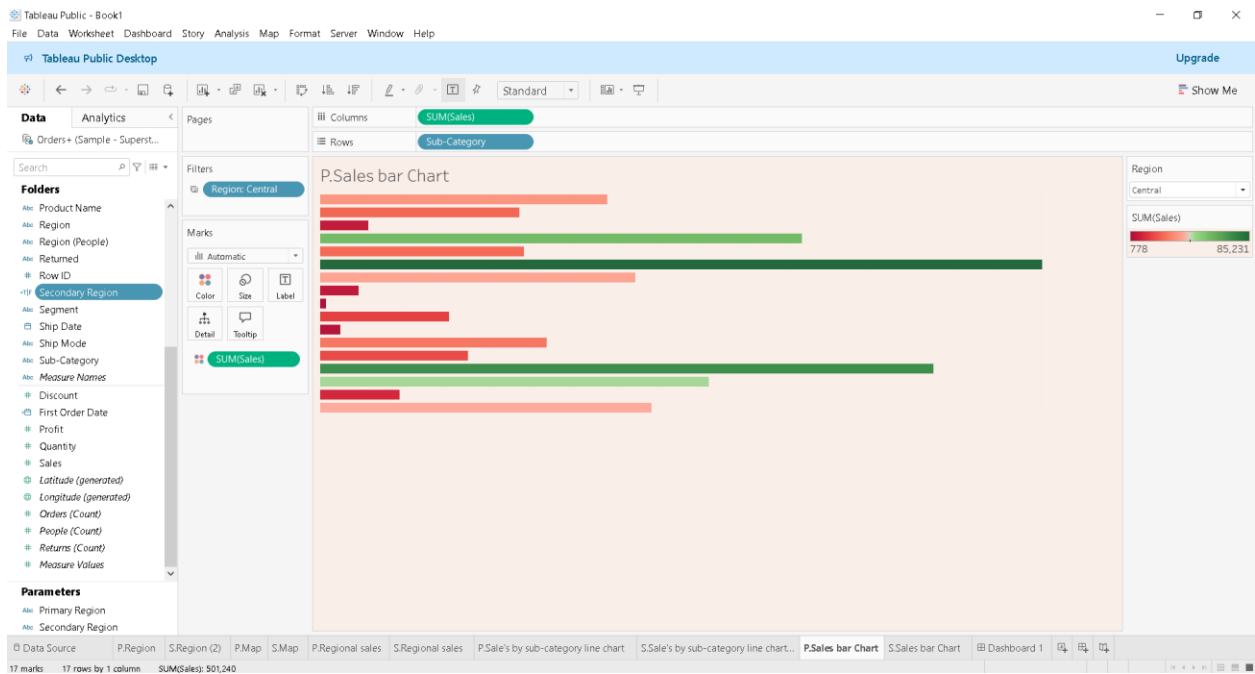
All None

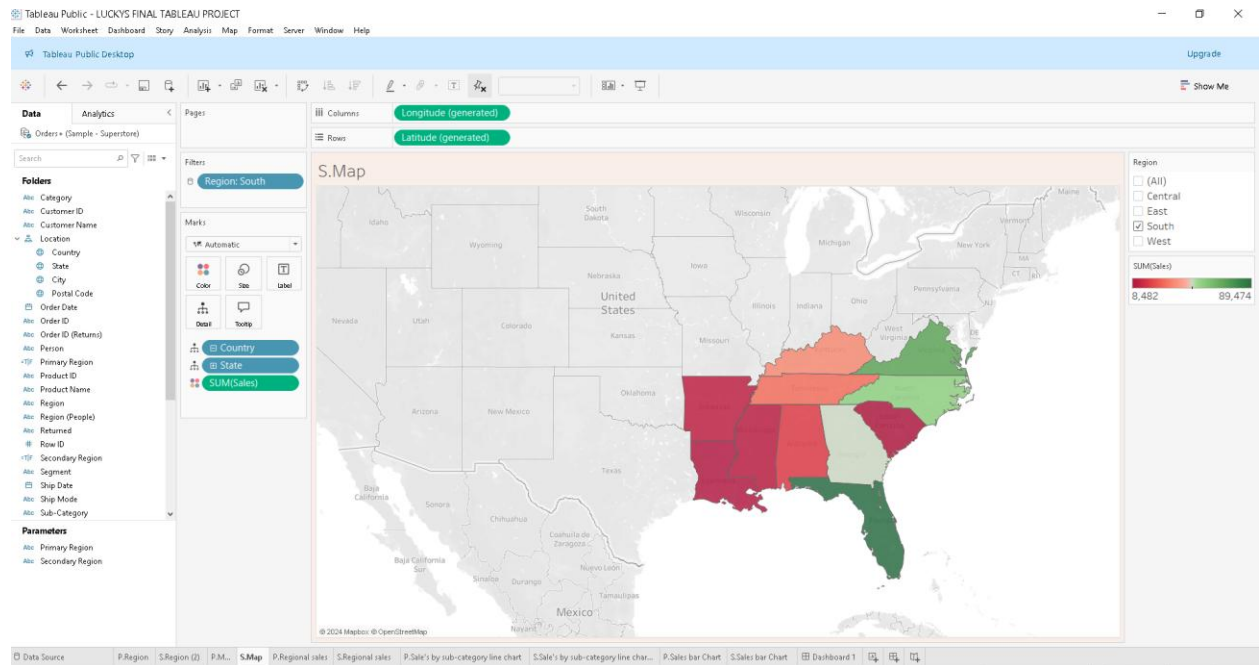
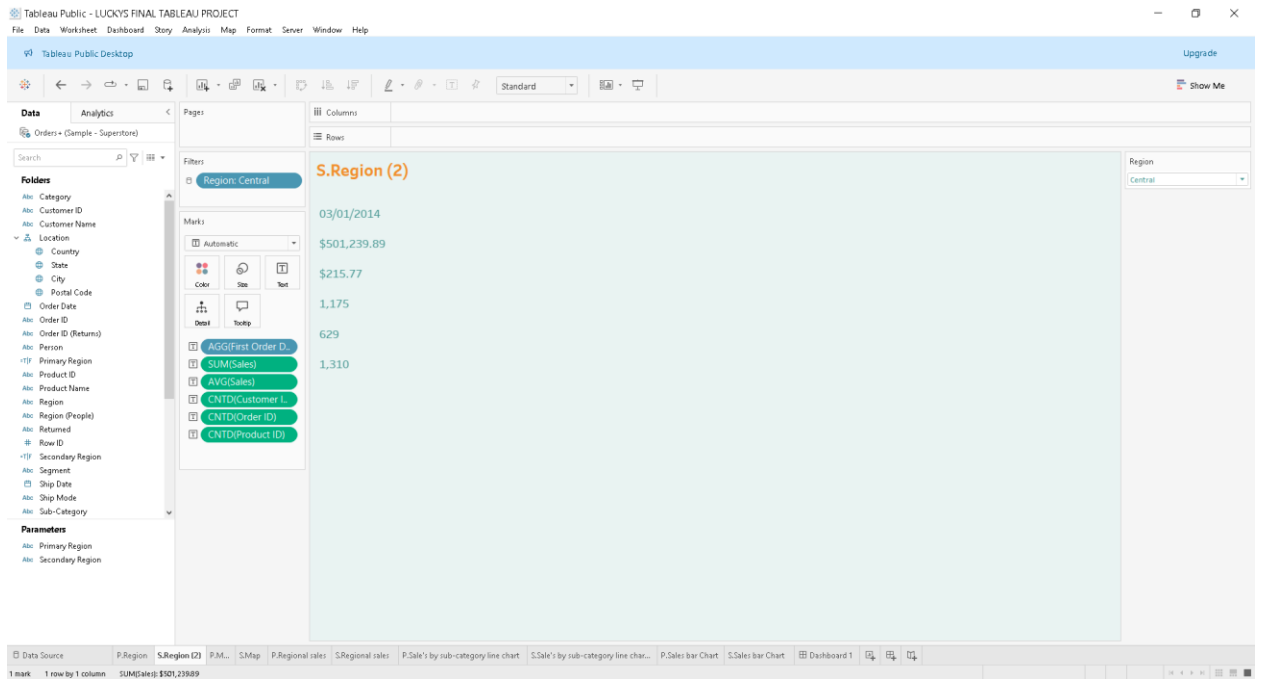
Summary

Field: [Measure Names]  
Selection: Selected 3 of 9 values  
Wildcard: All  
Condition: None  
Limit: None

Reset OK Cancel Apply







Filter [Measure Names]

General

Enter search text

☐ Count of Orders

☐ Count of People

☐ Count of Returns

☐ Discount

☒ Max. Sales

☒ Min. Sales

☐ Profit

☐ Quantity

☒ Sales

All

None

Summary

Field: [Measure Names]

Selection: Selected 3 of 9 values

Wildcard: All

Condition: None

Limit: None

Reset

OK

Cancel

Apply

Tableau Public - LUCKY'S FINAL TABLEAU PROJECT

FileDataWorksheetDashboardStoryAnalysisMapFormatServerWindowHelp

Tableau Public Desktop

Upgrade

Search

Folders

Order - (Sample - Superstore)

Category

Customer ID

Customer Name

Location

Country

State

City

Postal Code

Order Date

Order ID

Order ID (Returns)

Person

Primary Region

Product ID

Product Name

Region

Region (People)

Returned

Row ID

Secondary Region

Segment

Ship Date

Ship Mode

Sub-Category

Parameters

Primary Region

Secondary Region

Filters

Measure Names

Region: South

Measure Values

SUM(Sales)

MIN(Sales)

MAX(Sales)

Columns

Measure Names

Rows

Sub-Category

S.Regional sales

Sub-Category	Sales	Min. Sales	Max. Sales
Accessories	\$27,276.75	\$1.58	\$2,249.91
Appliances	\$19,525.33	\$5.20	\$2,104.55
Art	\$4,655.62	\$1.34	\$285.66
Binders	\$37,030.34	\$1.17	\$6,354.95
Bookcases	\$10,869.36	\$61.96	\$1,628.82
Chairs	\$45,176.45	\$33.94	\$2,803.92
Copiers	\$9,299.76	\$479.98	\$2,999.95
Envelopes	\$3,345.96	\$2.90	\$311.15
Fasteners	\$503.32	\$1.98	\$55.10
Furnishings	\$17,306.68	\$2.78	\$1,196.86
Labels	\$2,353.18	\$2.61	\$491.55
Machines	\$53,890.96	\$32.98	\$22,638.48
Paper	\$14,150.96	\$3.42	\$629.10
Phones	\$58,304.44	\$7.92	\$4,367.90
Storage	\$35,768.06	\$4.46	\$1,801.63
Supplies	\$8,318.93	\$2.94	\$4,164.05
Tables	\$43,916.19	\$79.97	\$4,297.64

Region

South

51 marks

17 rows by 3 columns

SUM of Measure Values: 450,810

