

Sales Dashboard

Summary

Purpose of this dashboard is to give meaningful insights of how sales is doing and help executives to take data driven decisions through data analytics and business intelligence in tableau. We have implemented some advanced and out of box concepts like doughnut chart, sheet and image as tool tip, forecast, reference band, text button (feature in tableau 19.2 beta), sheet as navigation, dashboard actions, custom bar chart, advanced calculations using LOD expressions and logical operations, custom hierarchy, word-cloud etc. We have data of 2017&2018 sales in we tried to implement every possible visualization that help sales managers to get undiscovered information insights.

Dashboards

1. Home dashboard

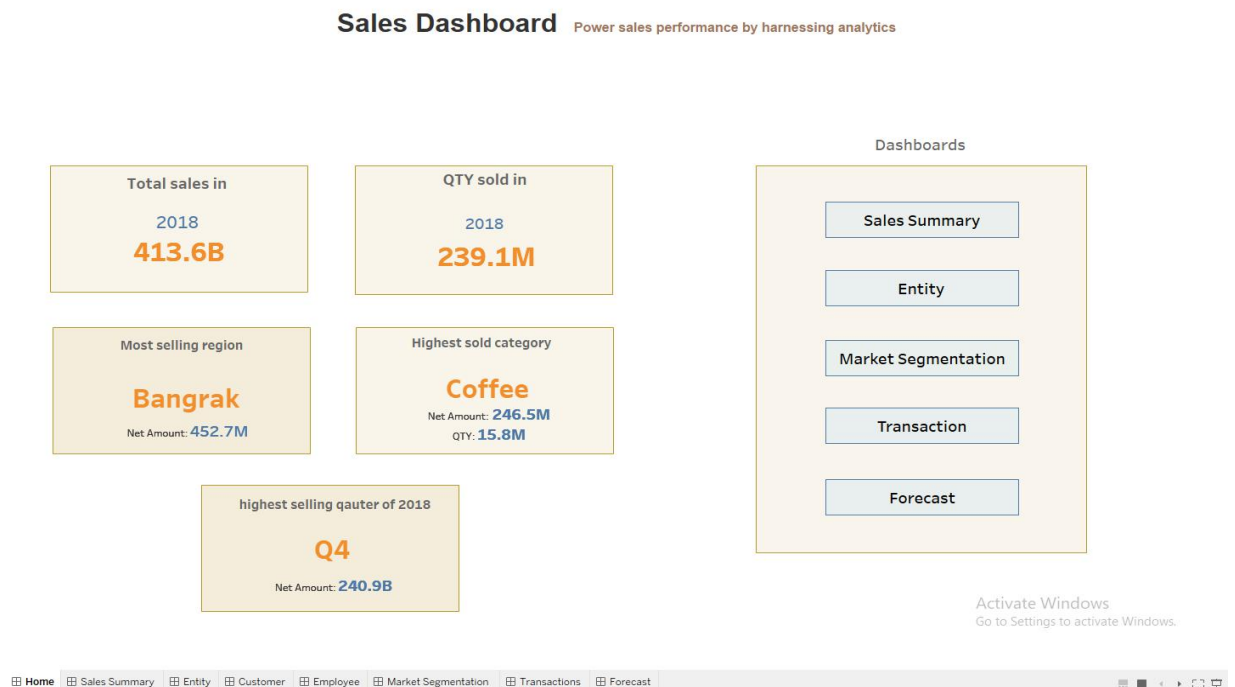


Fig Home dashboard

Motto of this dashboard is to provide navigation panel to all dashboards with some important factors of last year sales.

We have defined 5 key factors or information that could be best as starter dish for executives like:

1. Total sales in year 2017
2. Quantity sold in year 2017
3. Most profitable region in year 2017 with net amount
4. Highest sold category in year 2017 with QTY and net amount
5. Most booming quarter of year 2017

Then we have text buttons which are introduced in Tableau 19.2 beta version so I think let me use it before everyone does it! With tool tip. (Fig 1.2)

2. Sales Summary dashboard



Fig Sales summary dashboard

Sales summary dashboards gives you sales summary of year 2017 and 2018 in form of visualization like:

1. **Total sales KPI:** This KPI shows total sales in year 2017 and 2018 in million (Custom number formatting concept) with growth rate having growth indicator (YoY table calculation and number formatting).

I have also implement some advanced tool tips in this project let me introduce first as in fig total sales KPI tool tip shows which category has how much percentage of total sales in respective year.

2. **Total returned order:** This table have total number of returned order in year 2017 and 2018.

3. **Free samples:** Shows total number free samples we have distributed in year 2017&2018

Free sample tool tip shows most free sample distributed category wi0th region and total QTY.

4. **Quantity sold by category:** X axis QTY and Y axis category custom bar chart having icon at top of bar shows of how much QTY sold by category.

5. **Order summary:** this stack bar chart of category shows category sold by net amount on monthly basis of year's quarter. It has tool tip which shows category name, Year-Quarter-Month, Net amount, percent of total sales, Major buyer (Customer), Highest profitable region.

6. **Top 5 categories by sales:** We have implemented Donut chart which not provided by tableau directly to show top categories sold with net amount.

7. **Sales by city:** Table shows sales by region in year 2017&2018 with YoY growth having growth indicators.

3. Entity Summary Dashboard

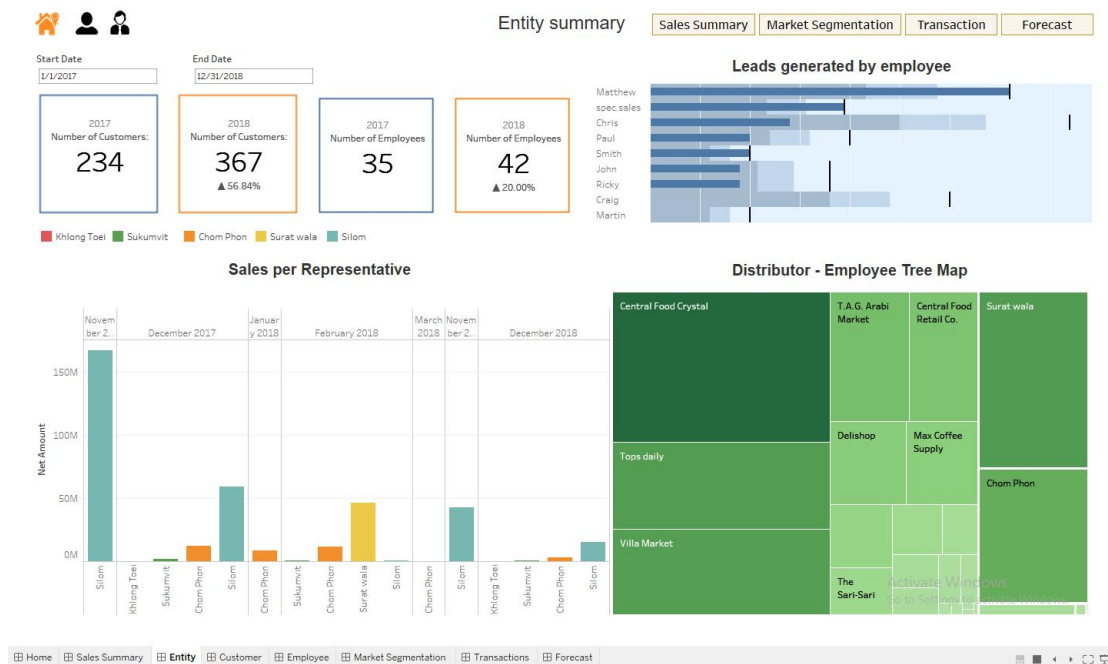


Fig Entity summary dashboard

In data we have some entities like Distributor, Employee, Customers etc. So this dashboard is for Entity summary and also navigate to Customer Entity and Employee Entity through buttons (Sheets uses custom shapes having image as tool tip).

1. **Number of Customers KPI:** This KPI shows how many customers we had in year 2017&2018 with growth rate so we can easily compare our customer relationship.

2. **Number of Employees KPI:** This KPI shows how many employees are there in year 2017&2018 with the growth rate and indicator.

3. **Leads generated by employee:** This box plot shows number of lead generating calls out of total calls from Productive call and unproductive columns in DB with average line and total line.

Tool tip shows employee name and productive call/ total call.

4. **Sales per Representative:** This chart is one of the most important chart in sales analytics shows sales per representative monthly.

For important chart tool tip also should be important so, we made tool tip that shows category sold by net amount bar chart of respective representative in respective month with total sale.

5. **Distributor - Employee Tree map:** we generate tree map of distributors by net amount also create custom hierarchy for tree map using change set value in dashboard

action called advanced action. on click it will show employees of that particular distributor by net amount.

Tool tip has density line chart by net amount month wise.

3.1. Customer Entity Dashboard

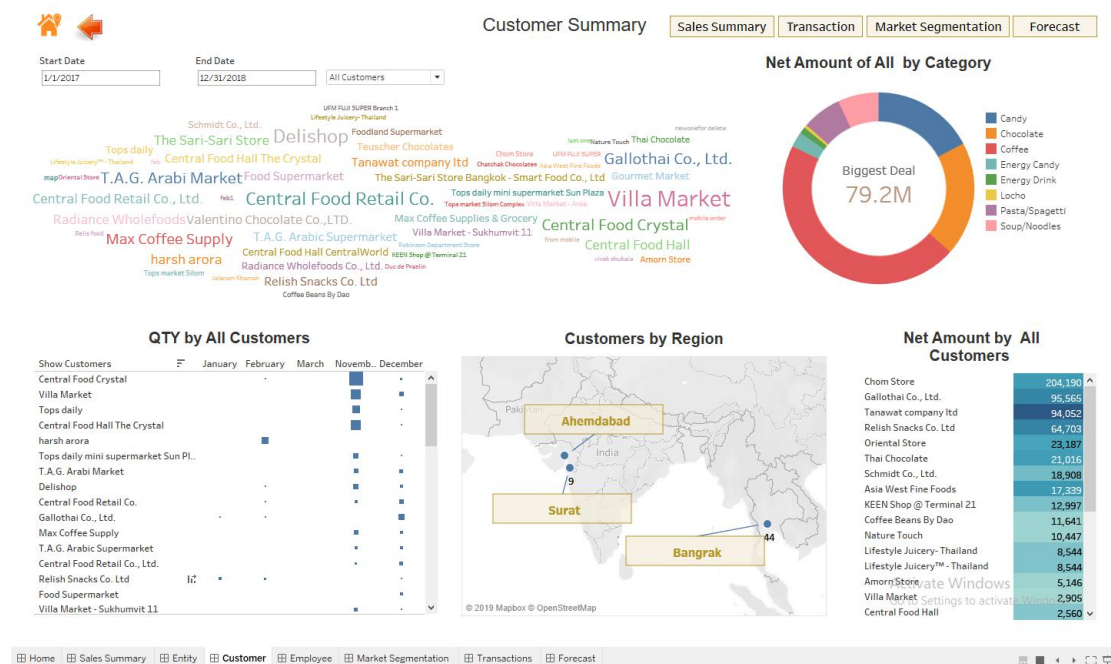


Fig Customer dashboard

Customer entity dashboard is to give customer insights like from which region are they, which item they buy most in which month, profit etc. Here we also have parameter of Top N customer.

Here we have back button to navigate back to entity summary dashboard.

1. **Word cloud:** Customers word cloud shows which customers are most important. It's look like fish but believe me I don't design it in that way!!
2. **Net amount of <Customer_Name> by Category:** This donut chart displays net amount by category of selected customer through dashboard actions and calculated fields. by default it will take all customers. It has also biggest deal KPI.
3. **QTY by <Customer_Name>:** This heat map shows in which month which customers demands more quantity. By default it will display all customers.
4. **Customers by region:** This map shows number of customers by region results into information which city has highest customer and which city is best to plan next sales strategy. We also use mark label to show city name.
5. **Net amount by <Customer_Name>:** This polygon density table shows which customers drives companies towards profit.

3.2. Employee Entity Dashboard

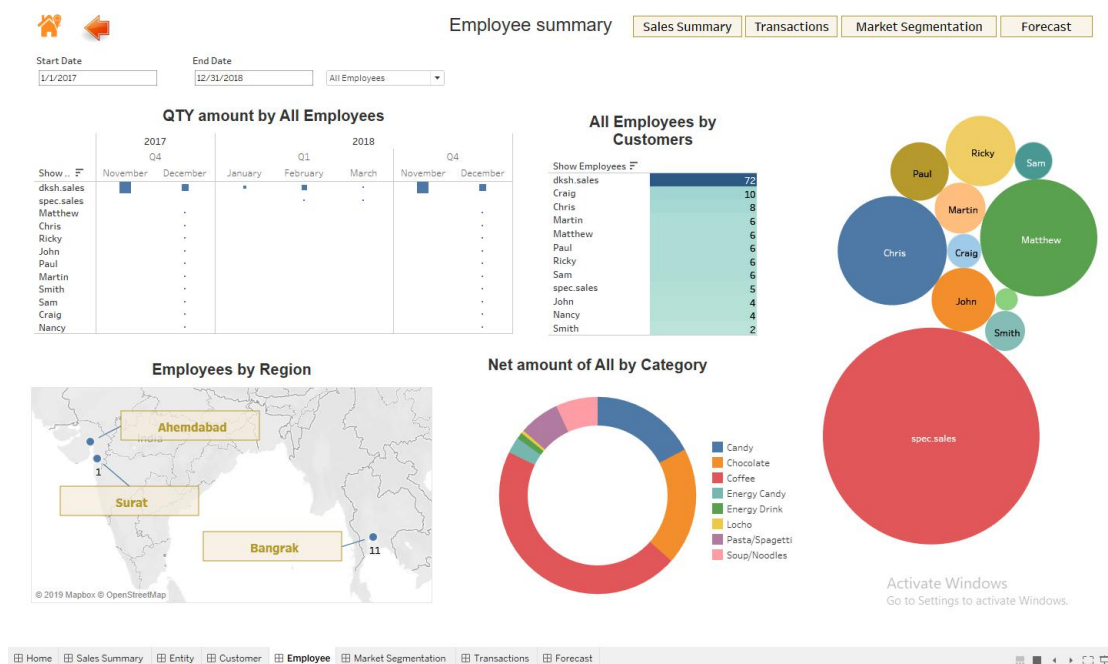


Fig Employees dashboard

Employee entity dashboards is a summary of employee entity that shows employees by number of customer, which employees buy more QTY this time, which employees proves best in sales etc.

1. **QTY amount by <Employee_Name>:** This heat map shows which employee buys how much QTY of which category in which month of year.
2. **<Employee_name> by Customer:** This Polygon density table shows which employee has how many customers in their region.
3. **Employees by region:** This map shows region with total number of employees so we can find which region has how many employees with how many customer and how they're performing in their region.
4. **Net amount of <Employee_name> by category:** this donut chart shows which category benefits that employee. In short it shows category by net amount for employee.

4. Transactions summary

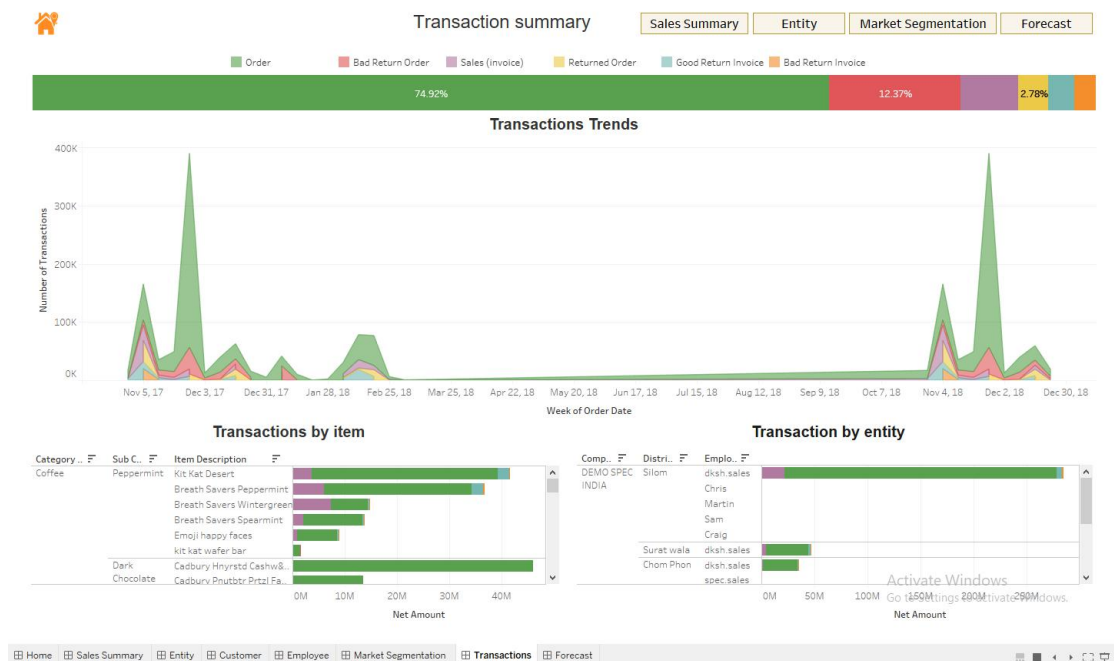


Fig Transaction summary dashboard

Transaction summary dashboard can give us insights of transaction types and sub types so that we can follow return and sales orders.

Top bar is percentage of transaction type with on click action.

- 1. Transaction trends:** This area map shows number of transactions by month of respective transaction type.
- 2. Transaction by item:** Table bar charts shows transaction type by category and sub category. So we can identify which category returns most. We can also see in which month with how many amount in tool tip having density line bar chart.
- 3. Transaction by entity:** Again table bar chart having visualization of number of transactions by Company, Distributor and Employee can results into which company's item returns most through which distributor or employee.

5. Forecast

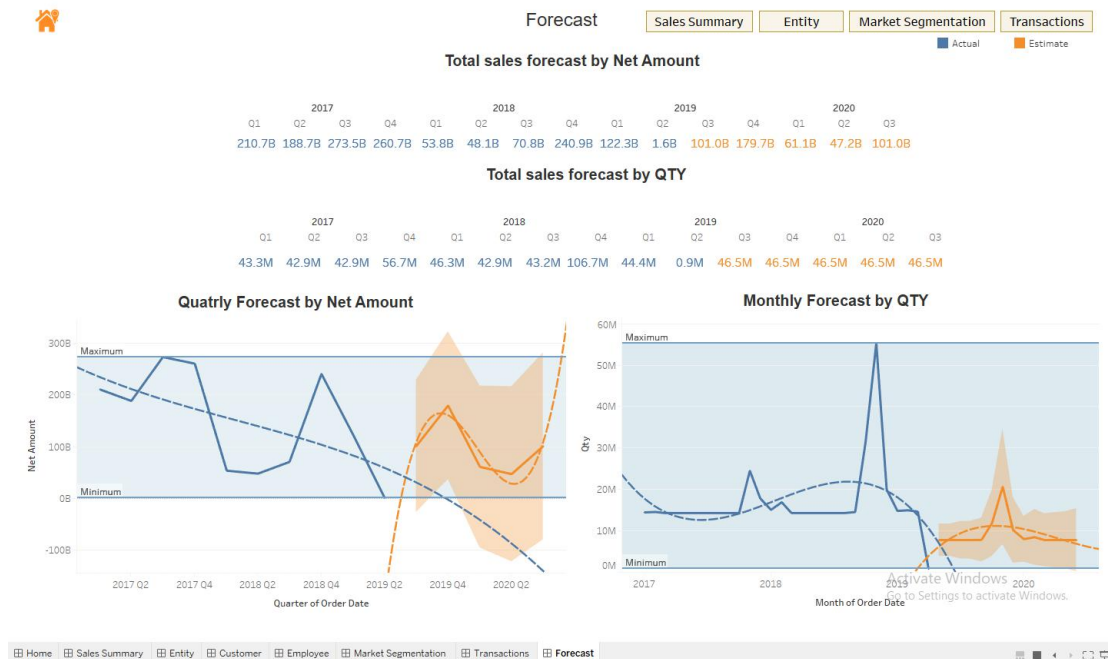


Fig Forecast dashboard

This is the most interesting part in every analysis that not only sales managers but every executives needs. All wants to know what will happen in future? So here I also tried to give that answer through advanced analytics that what will happen to total sales, QTY in coming years, Quarters or months.

1. **Total sales forecast by Net amount and Total Sales forecast by QTY:** In this table we predict up to total six quarters of year 2019 and 2020.

And follow by area line chart having reference band and trend line of Quarterly forecast by Net amount and Monthly Forecast by QTY.