

**PROJECT SUBMISSION OF TABLEAU
TRAINING**

**PROJECT NAME- SALES PERFORMANCE
ANALYSIS**

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DATE – 04/10/2021

BUSINESS SCENARIO :-

Mike Goodman, the head of Product Management of a retail products company, is responsible for determining which products his company should continue to offer for sale and which products should be discontinued from the company's product catalog. Mike wants to build a dashboard that will present monthly sales performance by product segment and product category to help him identify the segments and categories that have met or exceeded their sales targets, as well as those that have not met their sales targets.

OBJECTIVE

To build a dashboard that will present monthly sales performance by product segment and product category to help client identifying the segments and categories that have met or exceeded their sales targets, as well as those that have not met their sales targets.

TASK WHICH WE NEED TO PERFORM

- Use the Saved Sample – Superstore dataset.
- Create a bullet chart with Category and Segment dimensions and Sales measures.
- Blend the data with the Saved Sample - Sales Target data set to bring in the Sales Target measure.
- Color code the chart to identify Categories and Segments that are above or below target.
- Add the year of sales to the view to identify trends and outliers.
- Add a filter so that the user can select one, more than one, or all years.
- Create a dashboard with this view.

1. USE THE SAVED SAMPLE – SUPERSTORE DATASET.

TO UPLOAD THE DATA IN TABLEAU DESKTOP PUBLIC, USED MICROSOFT EXCEL

The screenshot shows the Tableau Public desktop application interface. On the left, the 'Connect' sidebar is visible, with 'Microsoft Excel' highlighted under the 'To a File' section. An orange arrow points to this option. The main workspace displays the 'Open' section, which includes three sample datasets: 'sales data analysis' (a bar chart), 'analysis' (a map of the United States), and 'sleep hour' (a table). A link 'Open from Tableau Public' is also present. On the right, the 'Discover' sidebar contains links to 'How-to Videos', 'Overview', 'Intro to the Interface', 'Chart Types', and 'More how-to videos...'. At the bottom of the 'Discover' sidebar, there is a section for 'Viz of the Day' featuring 'Sunny Street', and a link to 'Update to 2021.3.1 Now'.

Tableau Public - Book2

File Data Help

Connect

To a File

- Microsoft Excel
- Text file
- JSON file
- Microsoft Access
- PDF file
- Spatial file
- Statistical file

To a Server

- OData
- More...

Save locally. Work with big data. Connect to more data sources.

Upgrade Now

Open

sales data analysis

analysis

sleep hour

Open from Tableau Public

Discover

How-to Videos

- Overview
- Intro to the Interface
- Chart Types
- More how-to videos...

Viz of the Day

Sunny Street

Blog - Get insights faster with Explain Data

Sample Data Sets

Live Training

Current Status

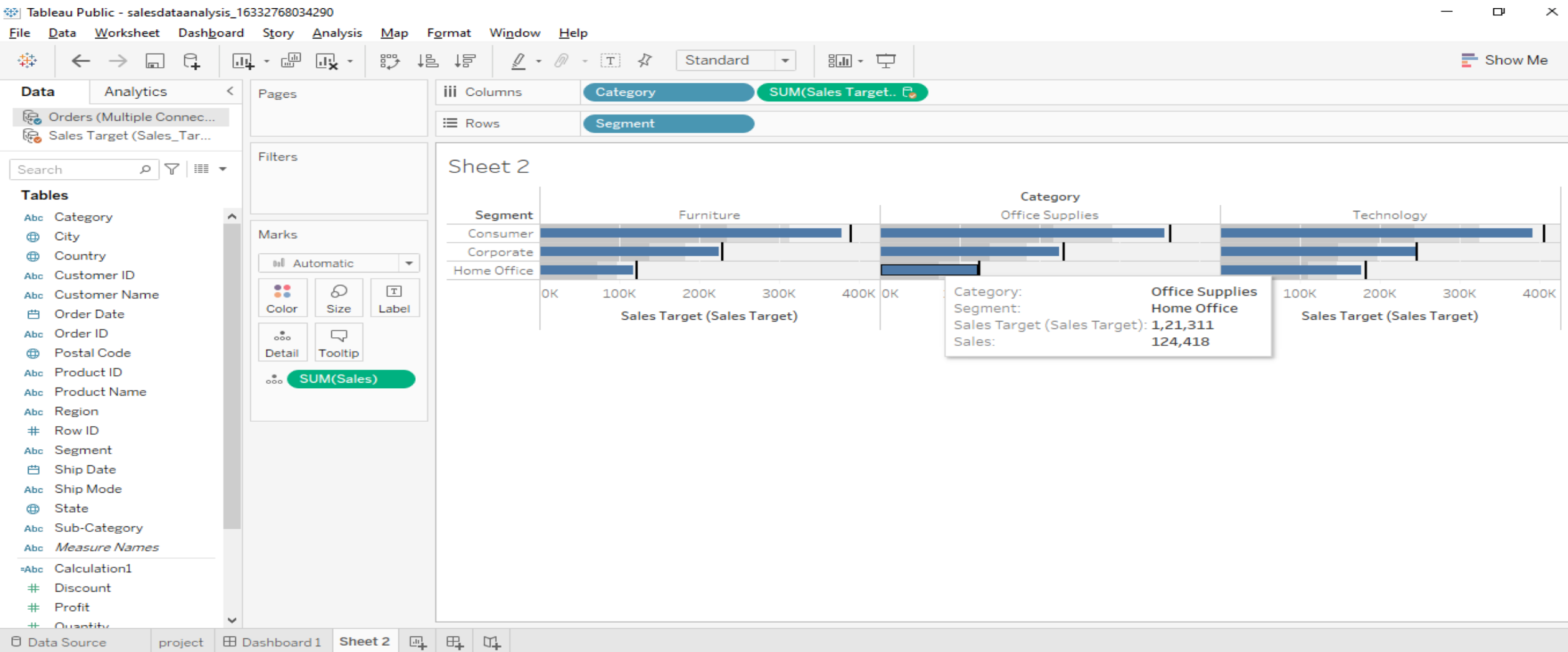
Update to 2021.3.1 Now

Type here to search

32°C

12:34 PM 04-10-2021

2. CREATE A BULLET CHART WITH CATEGORY AND SEGMENT DIMENSIONS AND SALES MEASURES.



3. BLEND THE DATA WITH THE SAVED SAMPLE – SALES TARGET DATA SET TO BRING IN THE SALES TARGET MEASURE.

Tableau Public - salesdataanalysis_16332768034290

File Data Worksheet Dashboard Story Analysis Map Format Window Help



Data Analytics

Orders (Multiple Connec...
Sales Target (Sales_Tar...

Search

Tables

Order Date
Order ID
Postal Code
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Calculation1
Discount
Profit
Quantity
Sales
Latitude (generated)

Pages

Filters

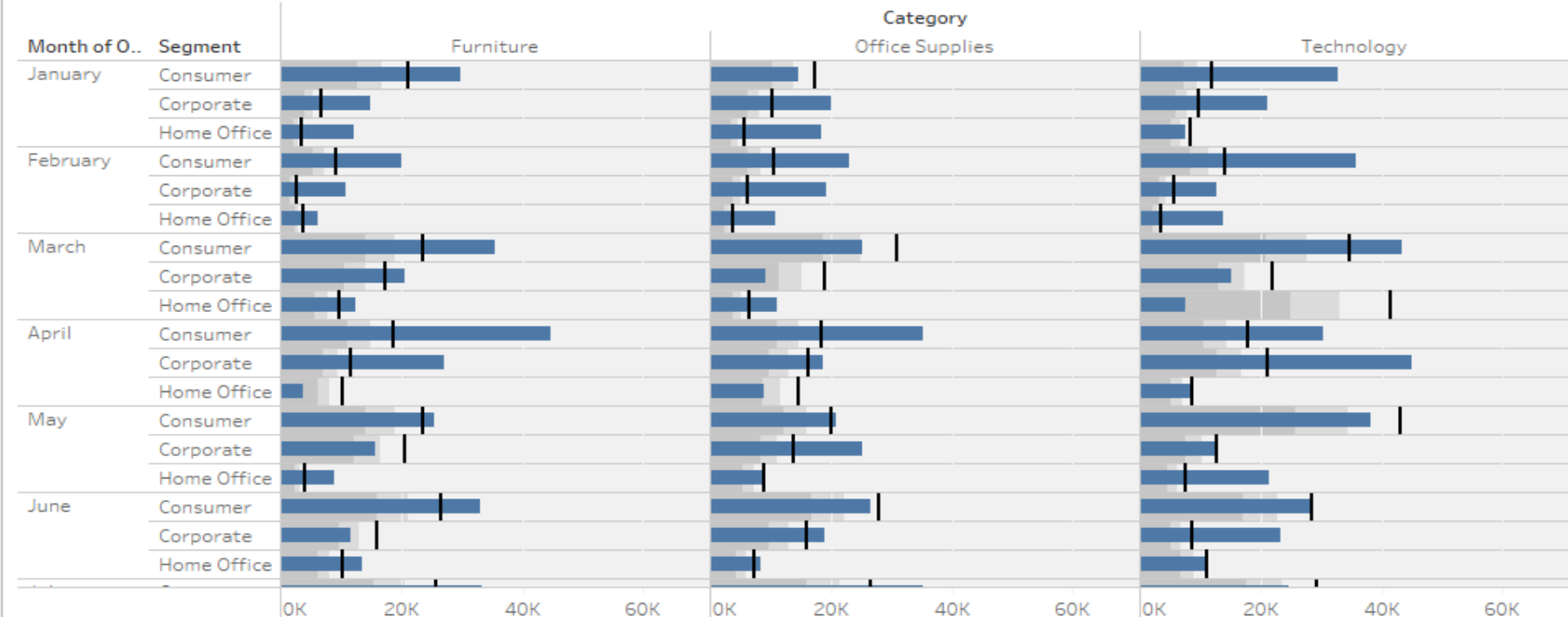
Marks

Automatic
Color
Size
Label
Detail
Tooltip
SUM(Sales)

Columns

Rows

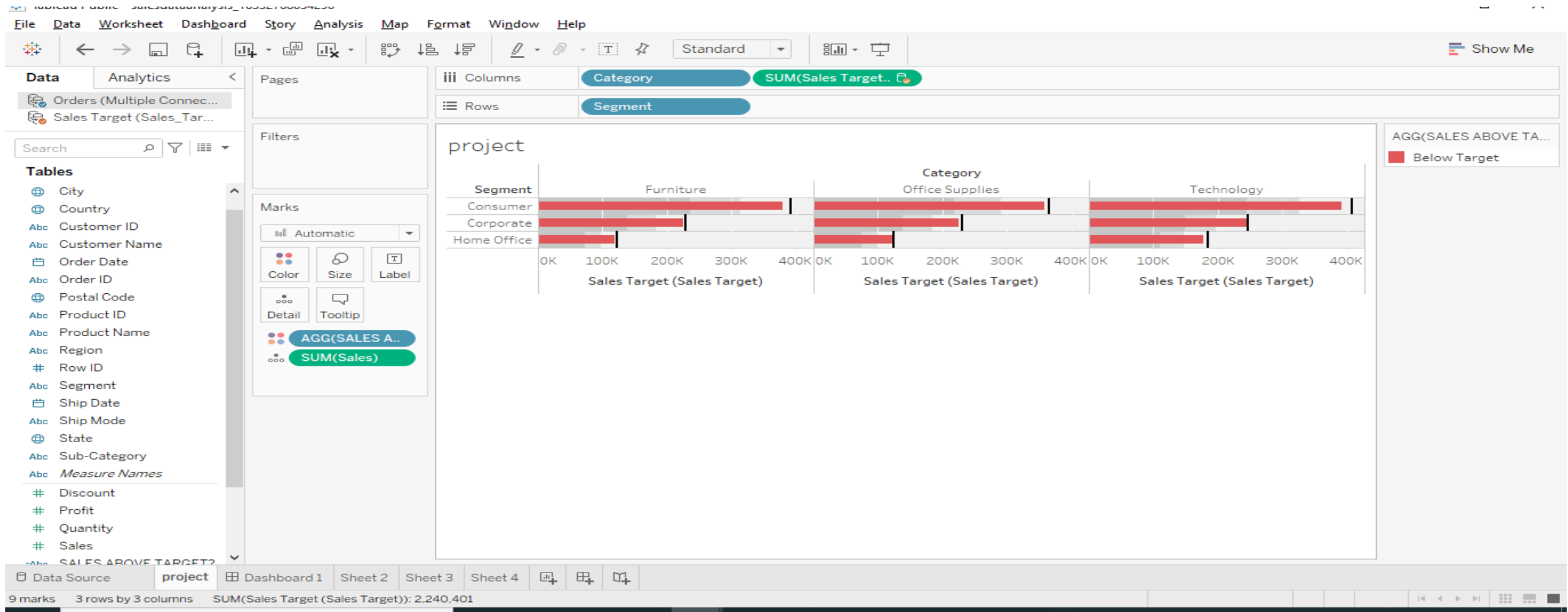
Sheet 2



4. COLOR CODE THE CHART TO IDENTIFY CATEGORIES AND SEGMENTS THAT ARE ABOVE OR BELOW TARGET.

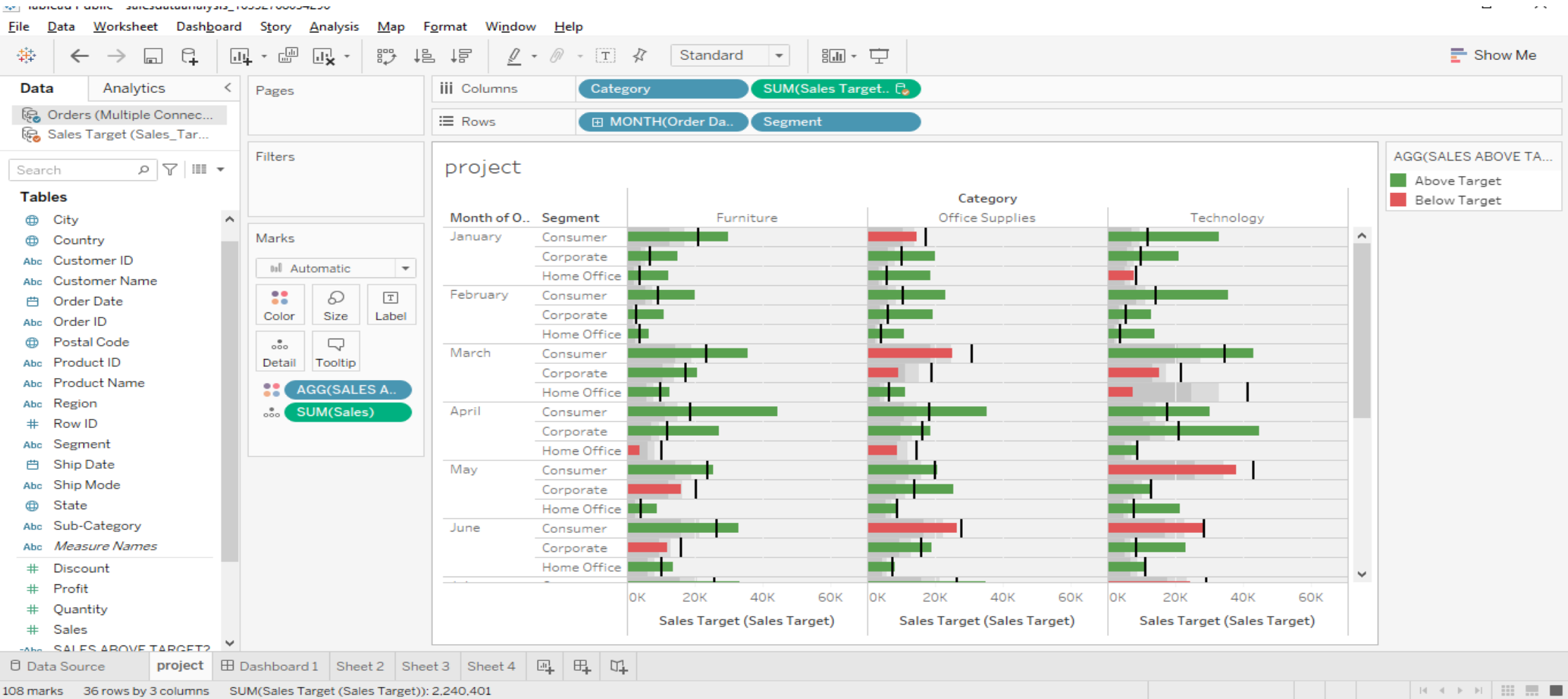
FOR THIS WE CREATE THE BELOW CALCULATED FIELD AND PUT INTO THE COLOR SHELF

```
IF SUM([Sales])>SUM([Sales Target (Sales_Target)].[Sales Target (Sales_Target)]) THEN " Below Target "  
ELSE " Above Target" END
```



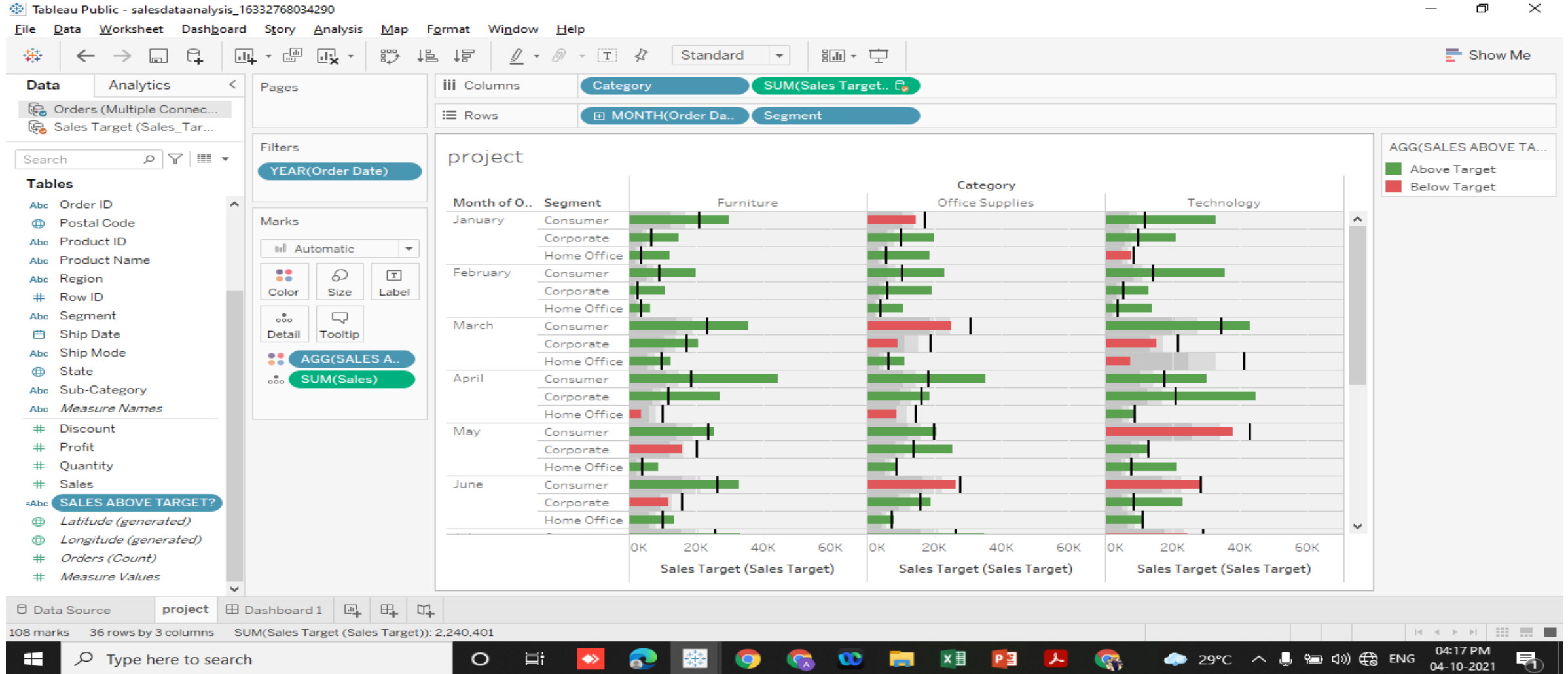
5. ADD THE YEAR OF SALES TO THE VIEW TO IDENTIFY TRENDS AND OUTLIERS.

HERE WE CAN SEE THE OUTLIERS AND MONTH WISE TARGET FOR COMPLTE YEAR



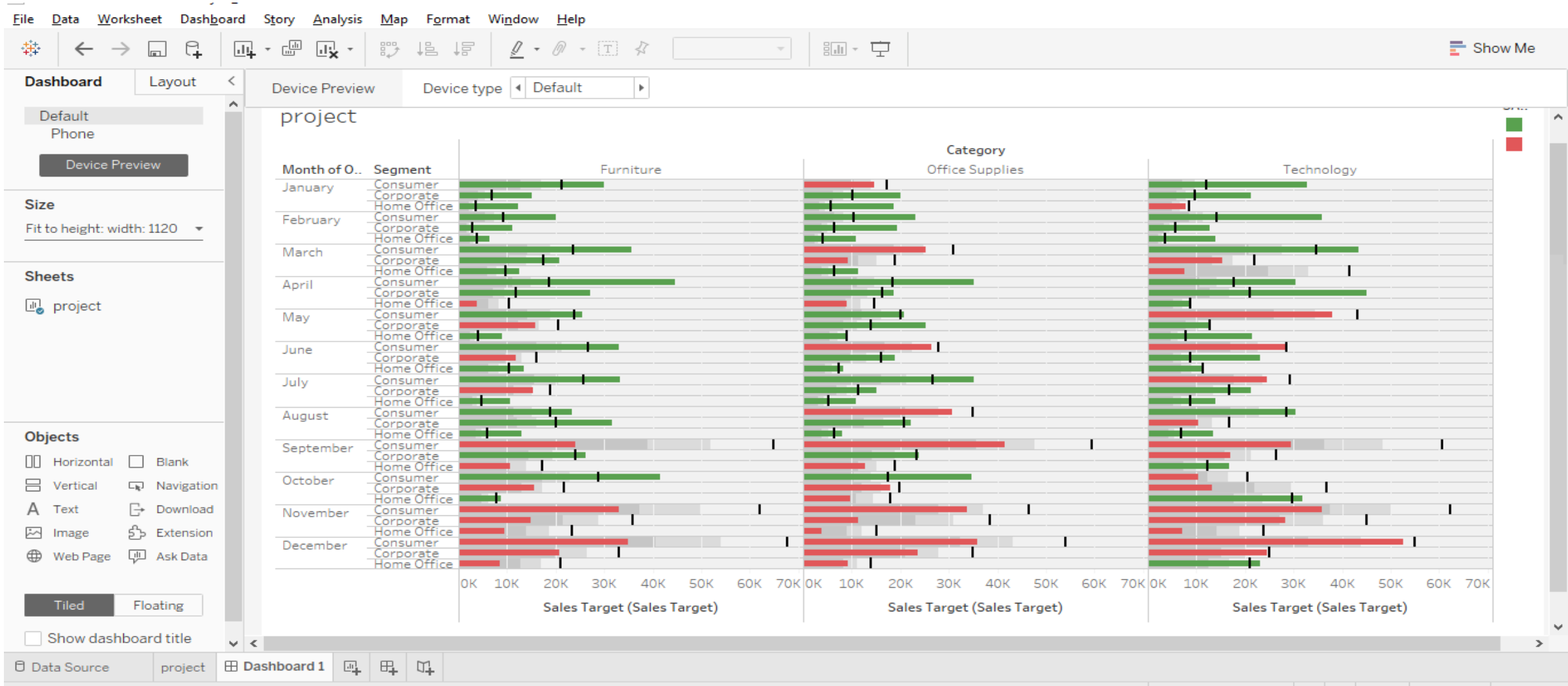
6. ADD A FILTER SO THAT THE USER CAN SELECT ONE, MORE THAN ONE, OR ALL YEARS.

FOR THIS WE CAN DRAG THE ORDER DATE FROM SAMPLE STORE DATA AND DROP INTO THE FILTER SHELF BY SELECTING THE YEAR, BY DOUBLE CLICK WE CAN FILTER THE YEARS



7. CREATE A DASHBOARD WITH THIS VIEW.

WE CAN DRAG THE PROJECT WORKSHEET INTO DASHBOARD



PROJECT LINK FOR TABLEAU PUBLIC SERVER

https://public.tableau.com/app/profile/anu.verma2167/viz/salesdataanalysis_16332768034290/Dashboard1?publish=yes

THANK YOU