

TABLEAU

Day 17

Funnel Chart

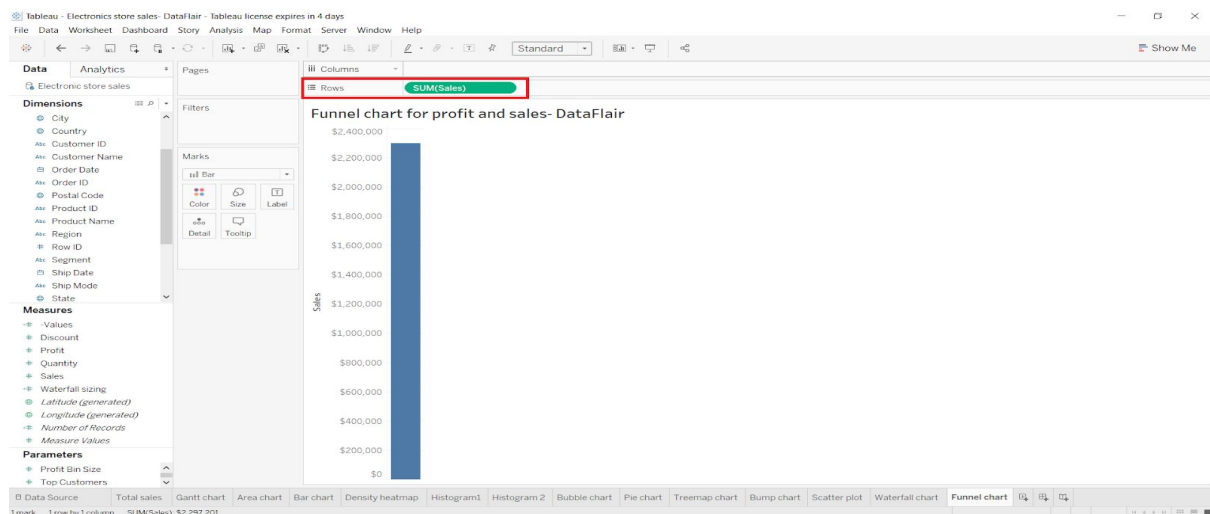
Funnel charts are a great way to track progress through a workflow with multiple steps. They can highlight how well a process is being followed and easily identify any bottlenecks. You can even use table calculations to look at different ways to measure progress to each step (percent of total, percent change, etc.).

How to Create a Tableau Stepped Funnel Chart?

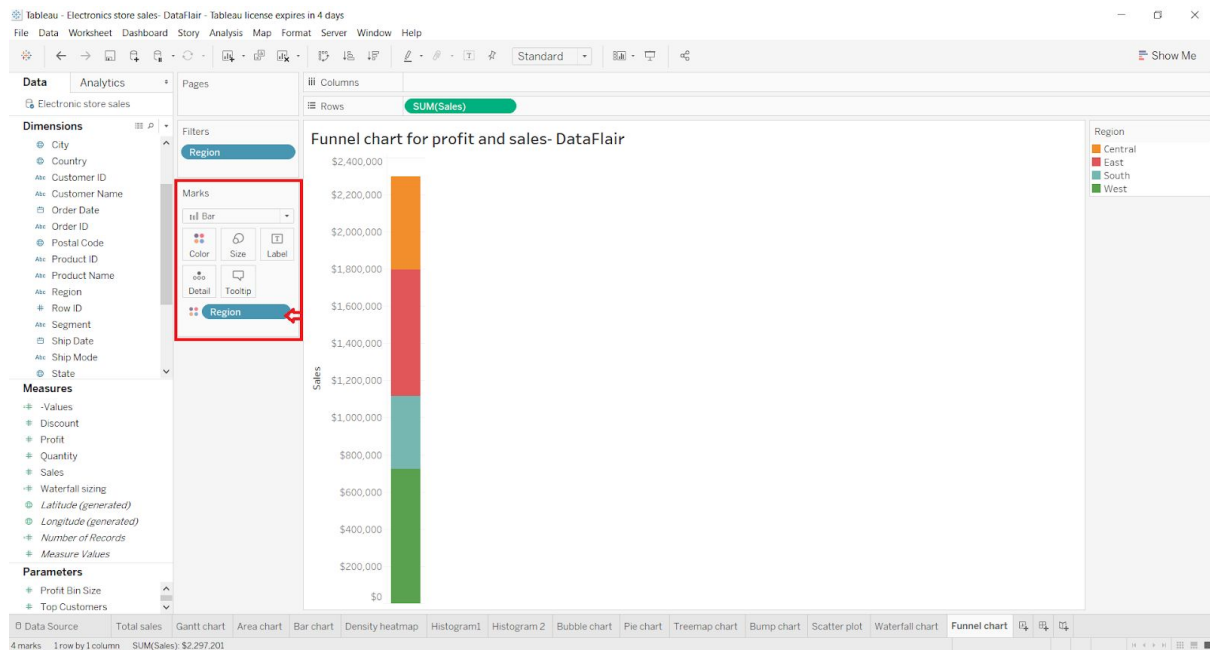
Example 1

Step 1: Add Measures to the Rows Section

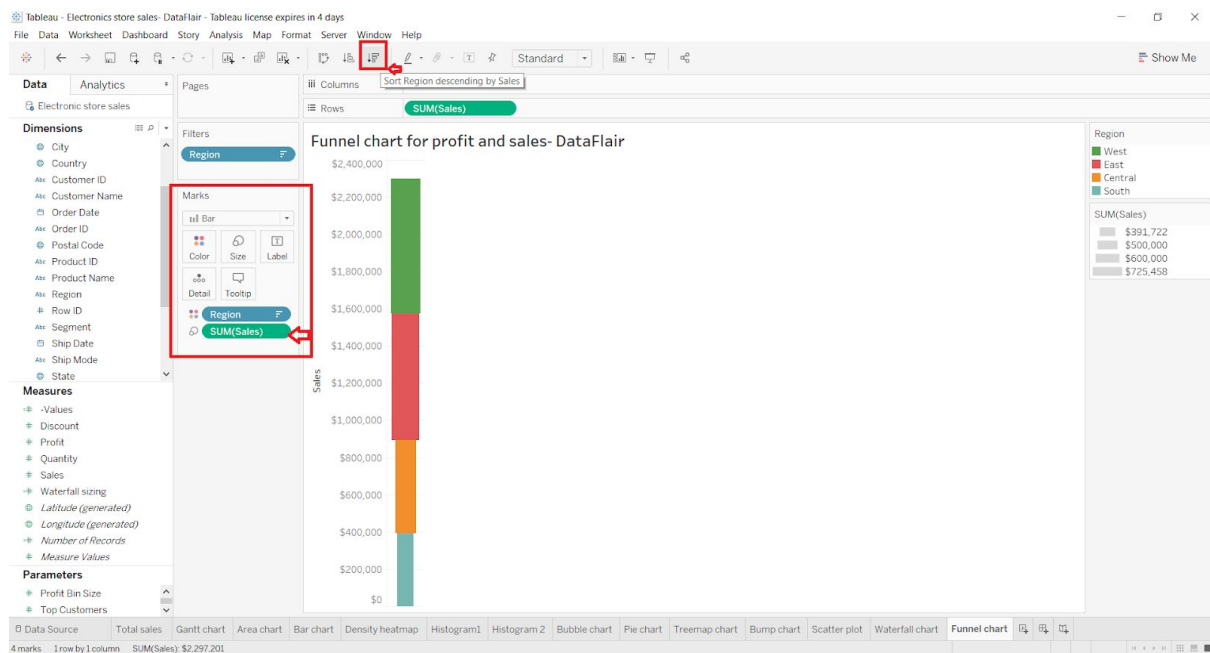
To begin with, we add one measure that is *Sales* to the Rows section. We select the aggregation type as SUM.



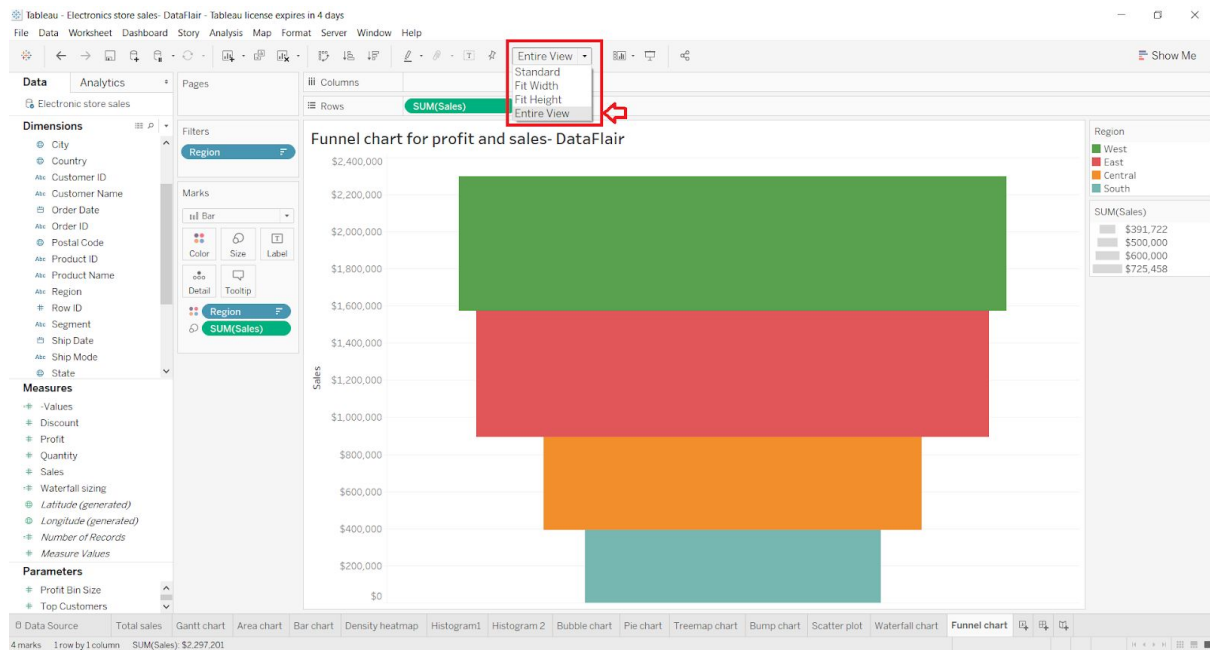
Step 2: Select Dimensions in the Marks Section. Next, we select a dimension (*Region*) from the list of Dimensions at the left and drag it onto the Colors card in the Marks section. This will divide our vertical bar into four different colors each of which represents a region.



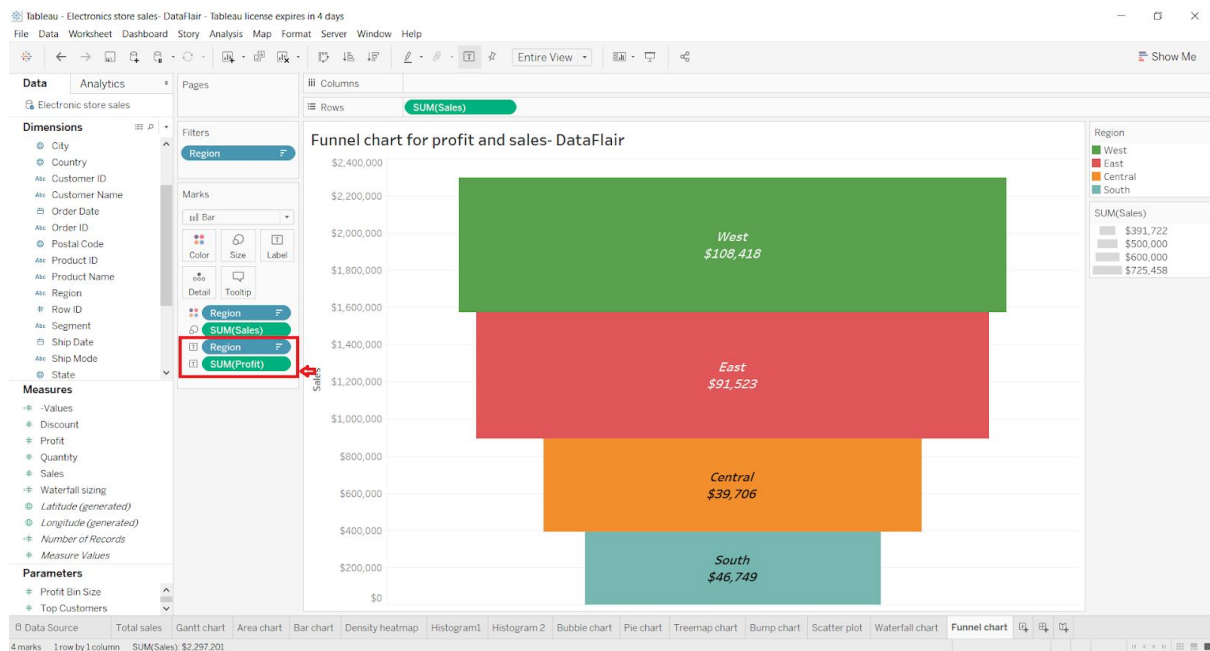
Then, we add *SUM(Sales)* into the Size box present in the Marks section. Also, we select the icon for the “Sort Region descending by Sales” option. It will arrange the segments on the bar in a descending manner.



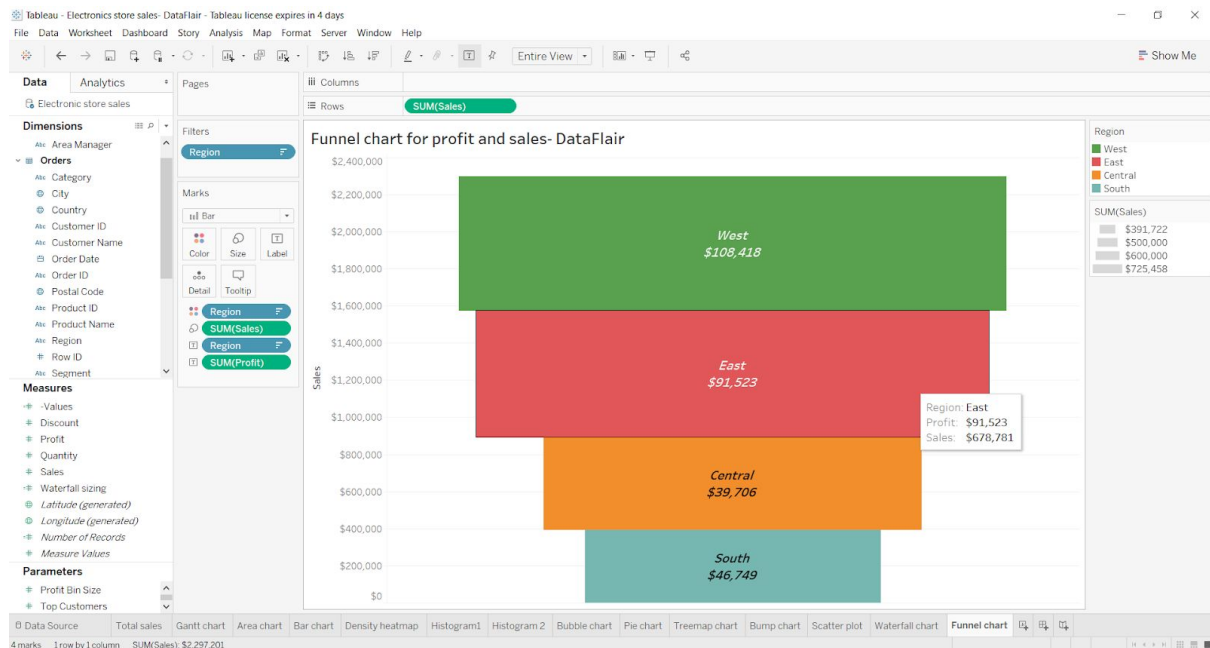
Step 3: Convert Standard View to Entire View. By default, the view type is set to *Standard*, we change it to *Entire View* so that our chart covers the full view and looks more like a funnel in shape.



Step 4: Add Labels in the Marks Section. Next, we add the fields *Region* and *SUM(Sales)* into the Label box present in the Marks section.



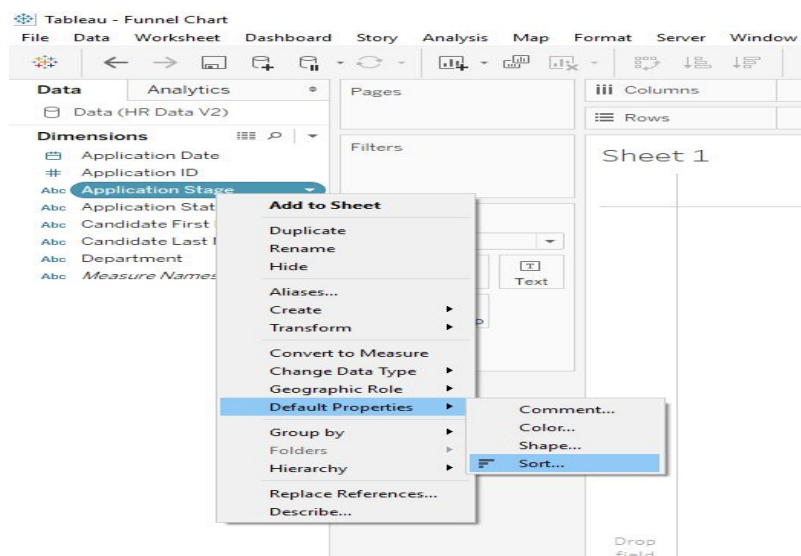
Step 5: Add text labels showing the region and total sales for each region block in our funnel chart.



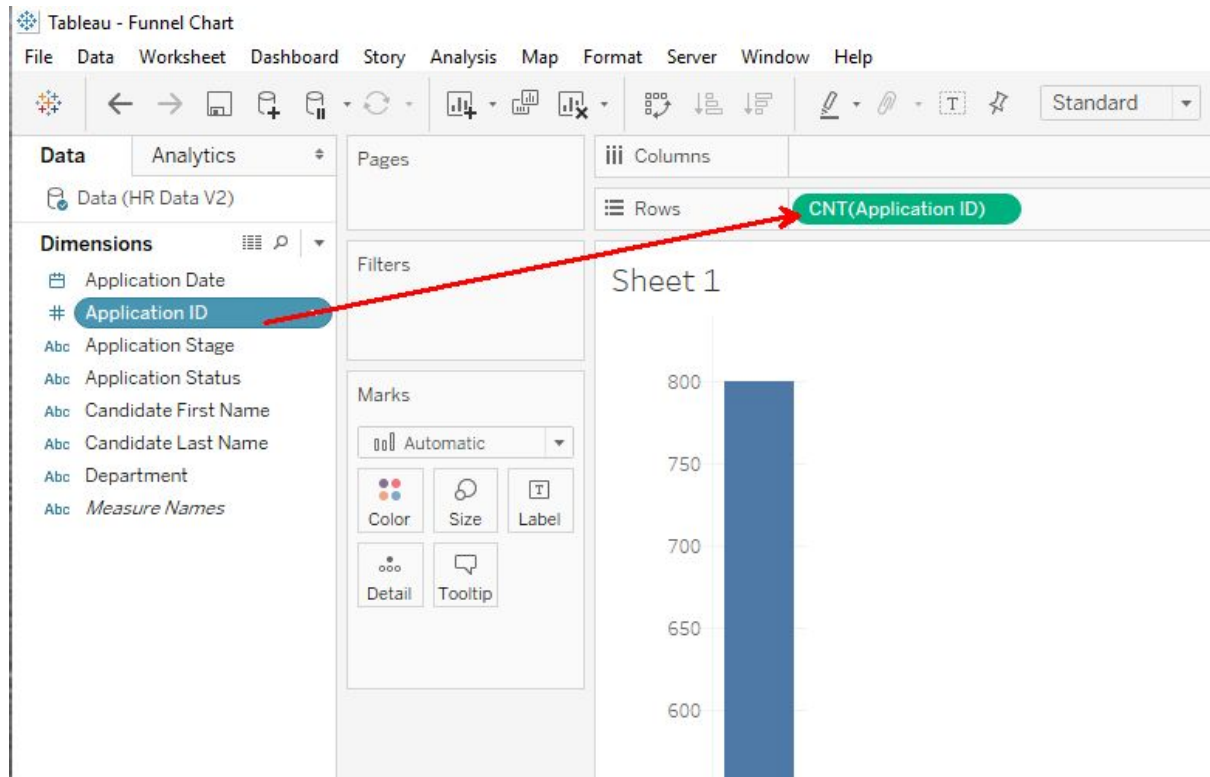
This final funnel chart of ours is showing the total sales of electronic items in four different regions. The chart shows total sales in descending order from top to bottom. Thus, this is a simple or stepped funnel chart.

Example 2

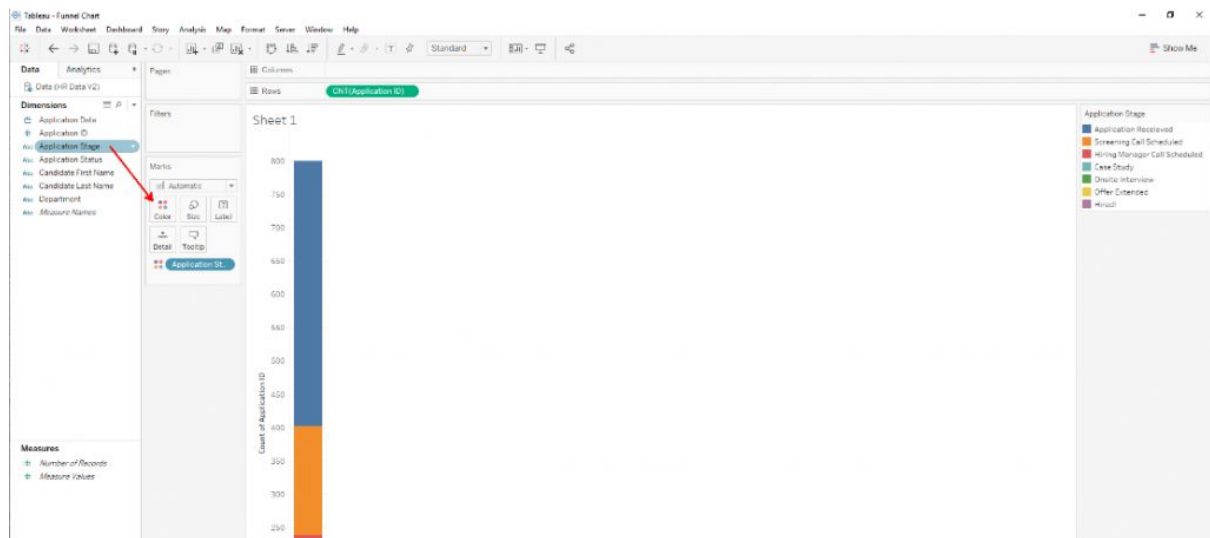
Step 1: Set the default sort order for the stages of your data (Tableau will default to alphabetical).



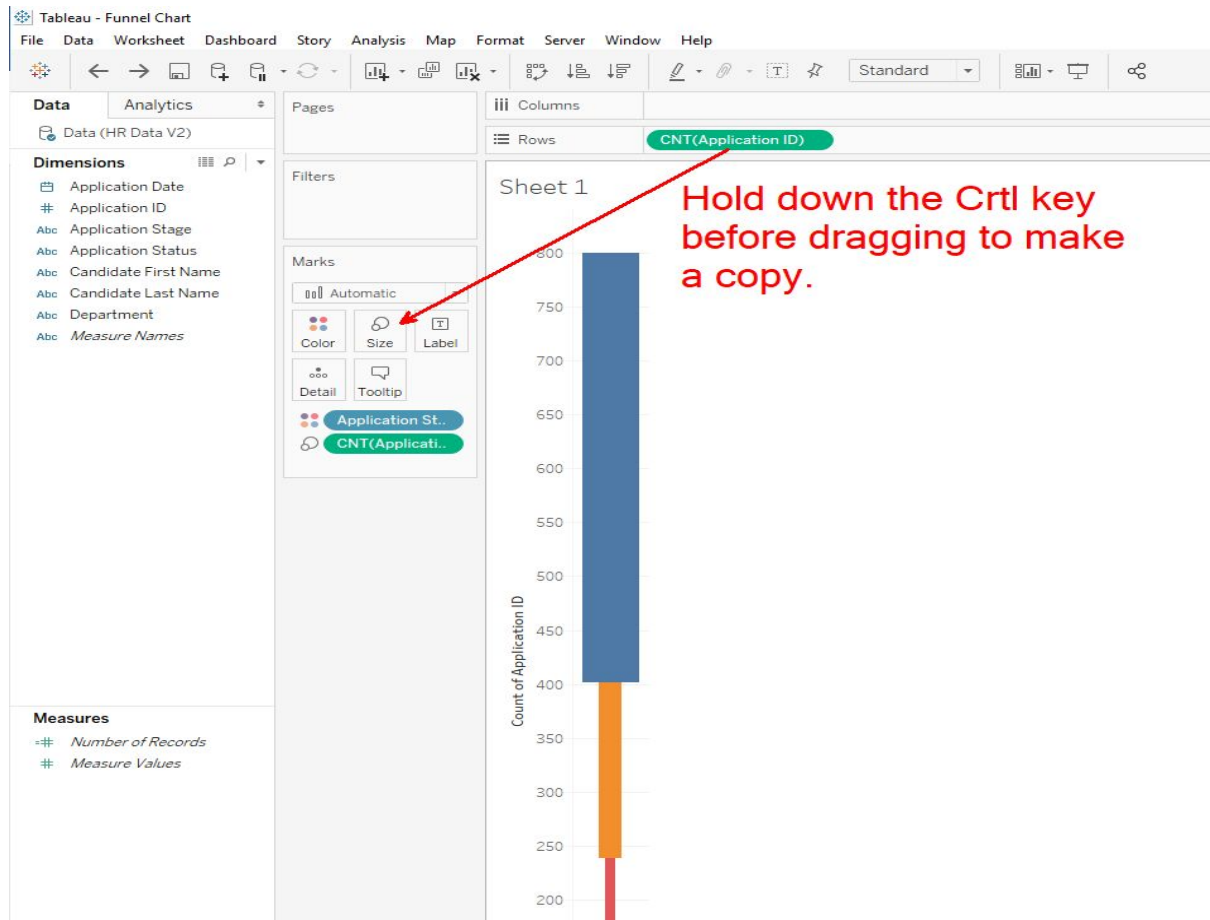
Step 2: Drag your record Count field on to the Rows shelf. This may be the Number of Records field provided by Tableau or an ID dimension field. Ensure the Count or Count Distinct aggregate function is selected.



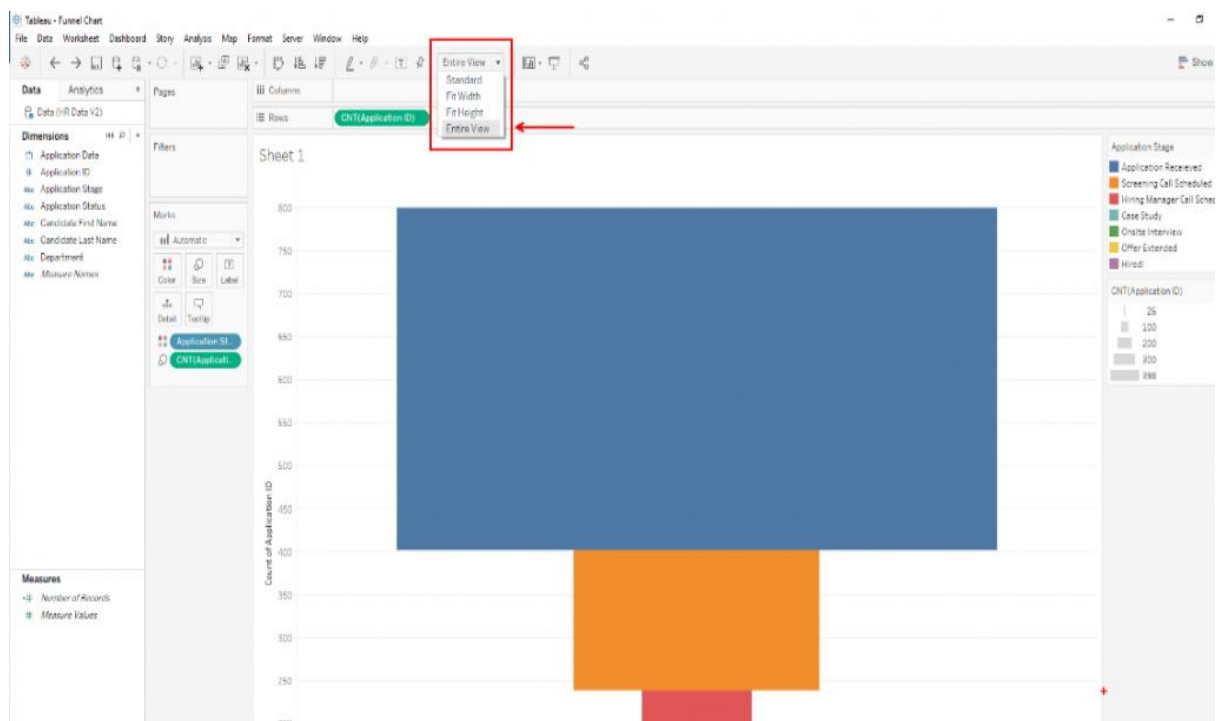
Step 3: Drag the Dimension pill, which includes your stages, onto Color.



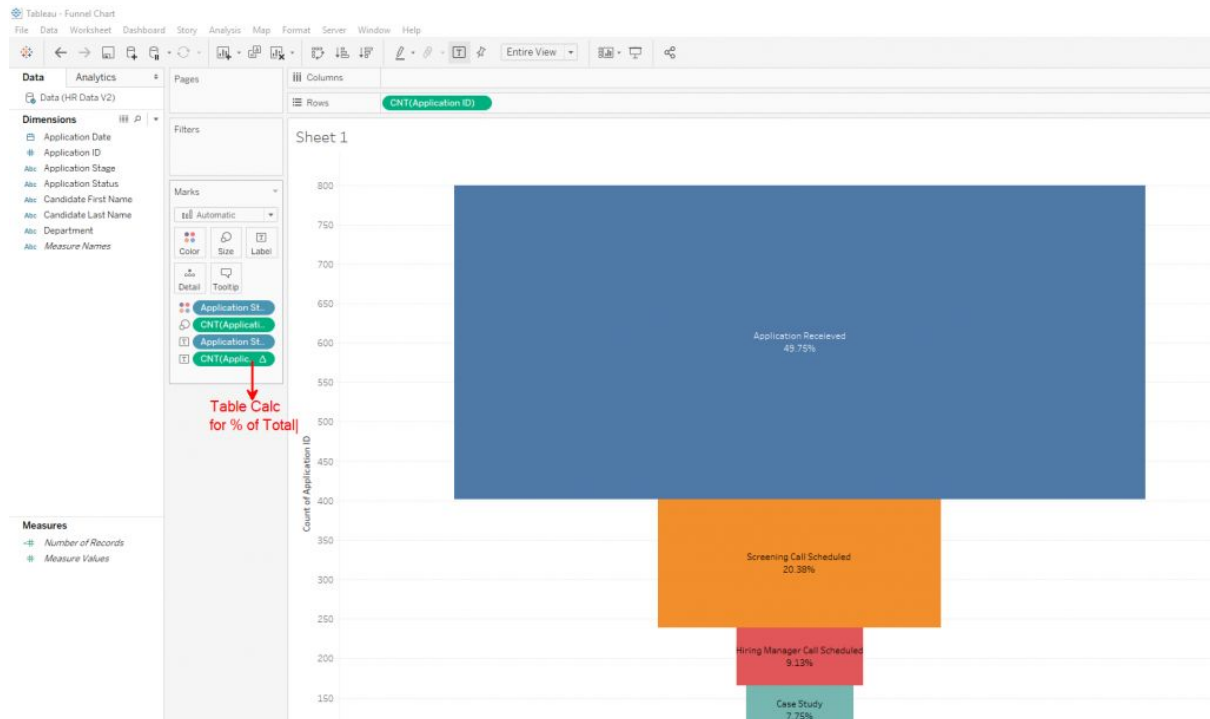
Step 4: Make a copy of your Count field and drag it from the Rows shelf onto the Size tile in the Marks card.



Step 5: Change the view fit from Standard to Entire View.

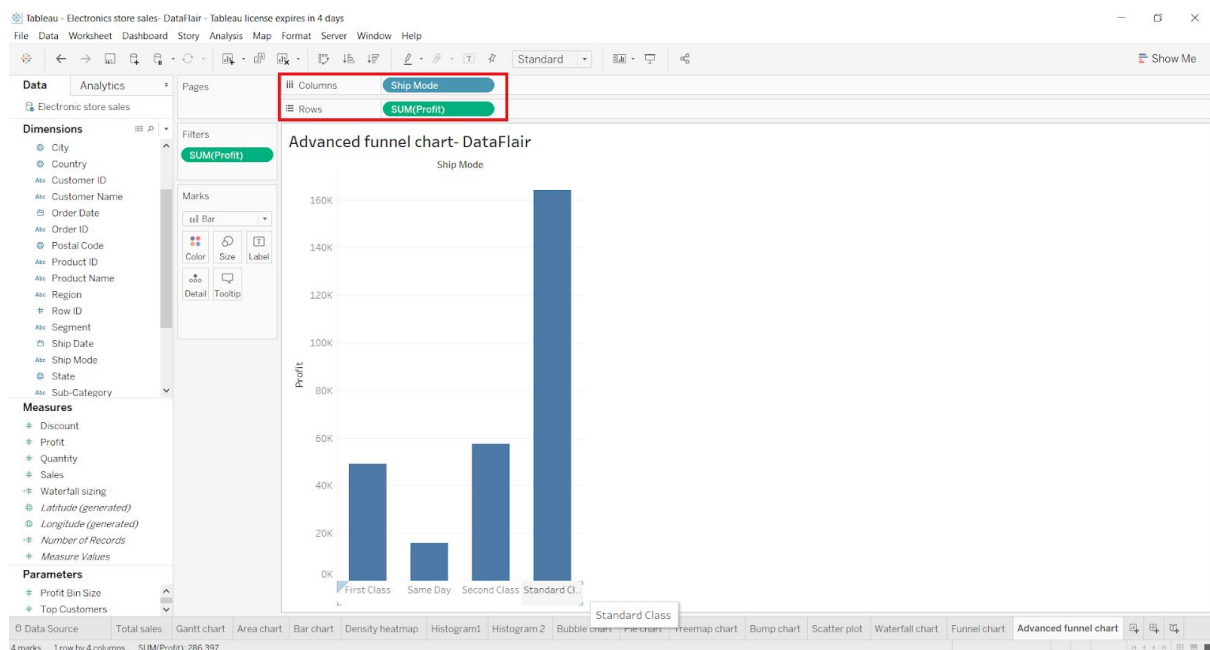


Step 6: Add labels and format the chart to your liking.

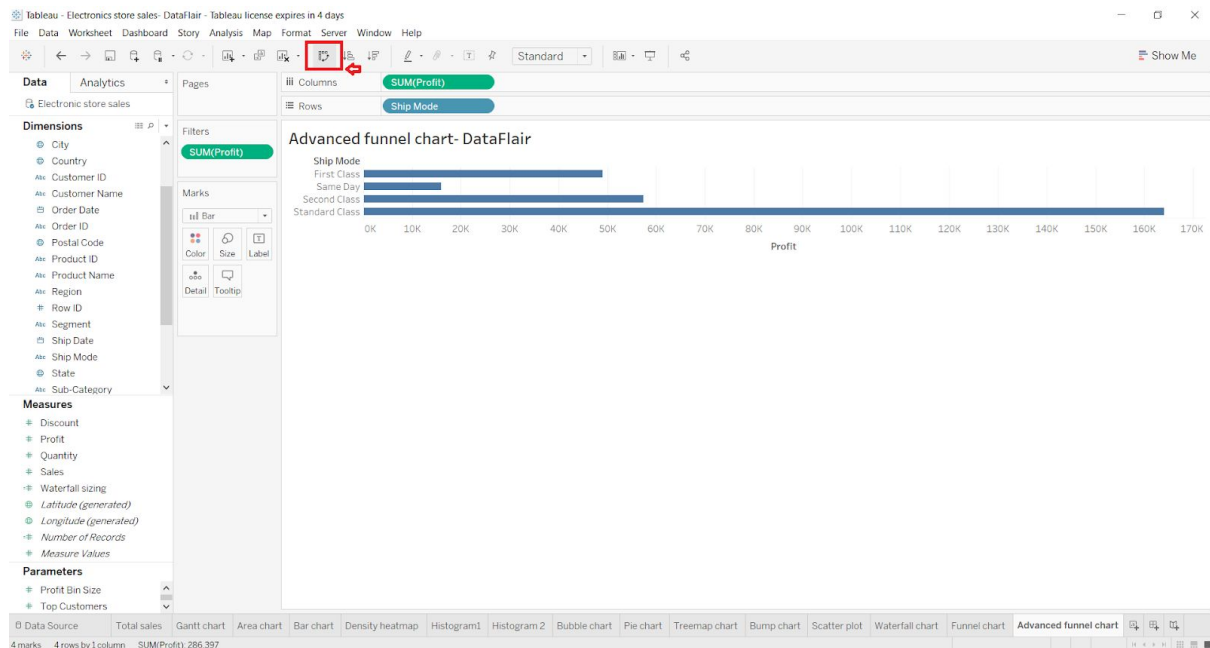


How to Create an Advanced or Smooth Funnel Chart?

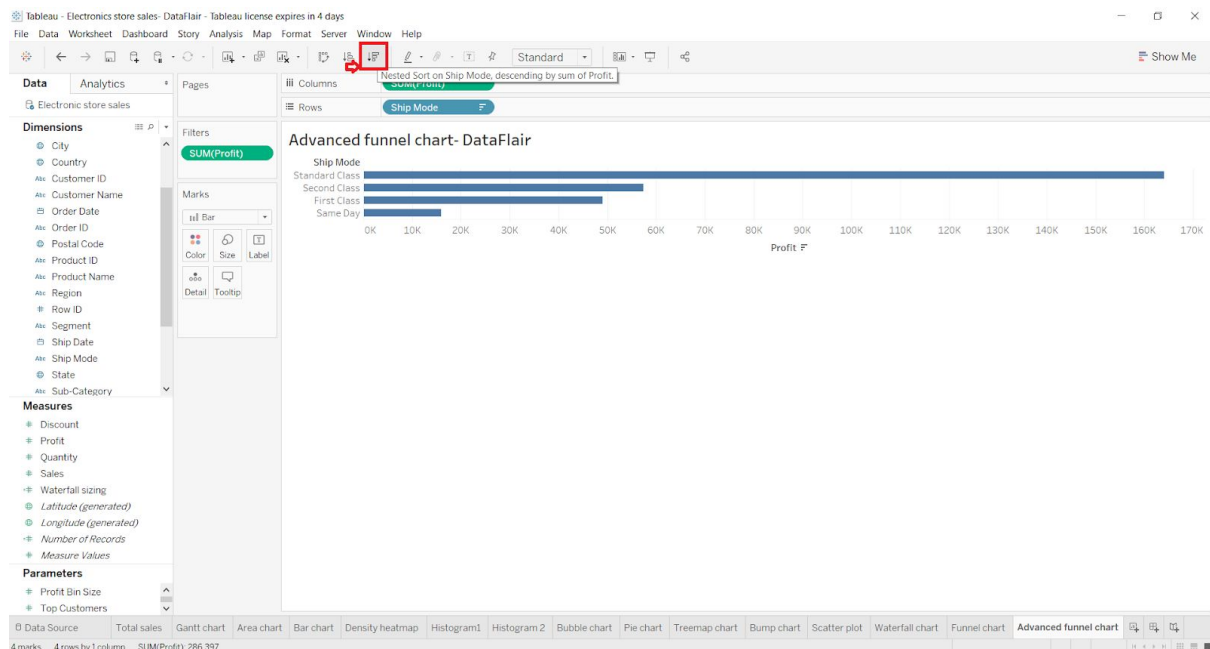
Step 1: In the first step, we take a dimension; *Ship Mode* and a measure; *SUM(Sales)* and put them into Columns and Rows sections respectively.



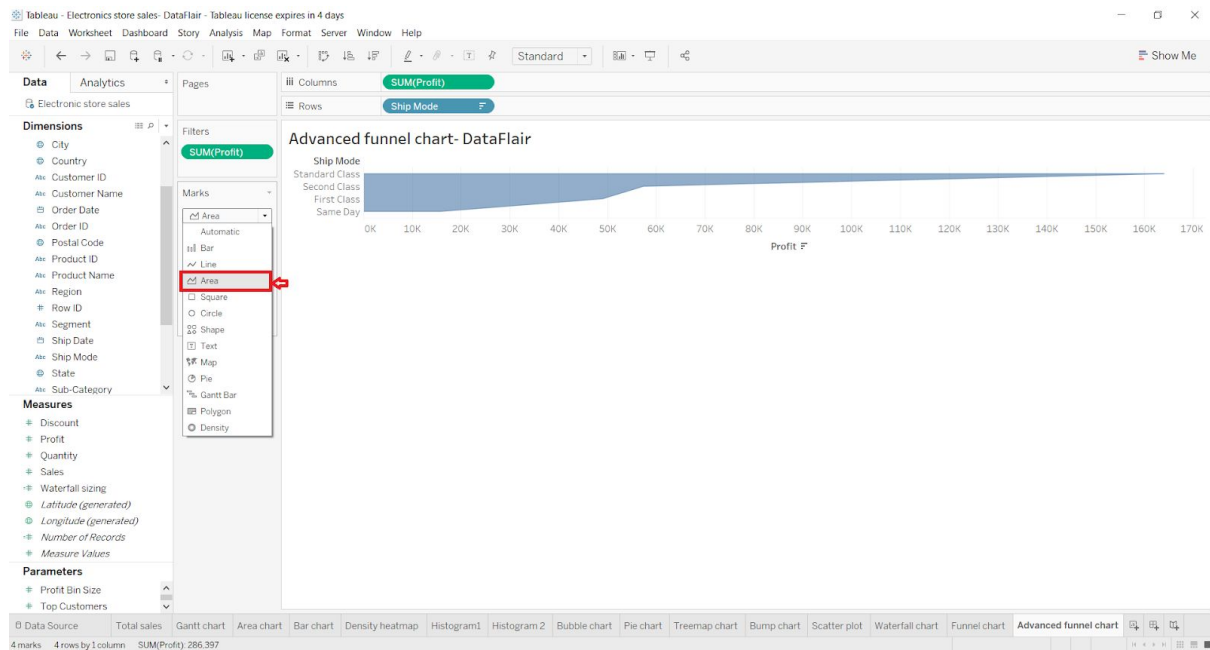
Step 2: We change the perspective from vertical bars to horizontal bars. Click on the icon shown in red in the screenshot shown below.



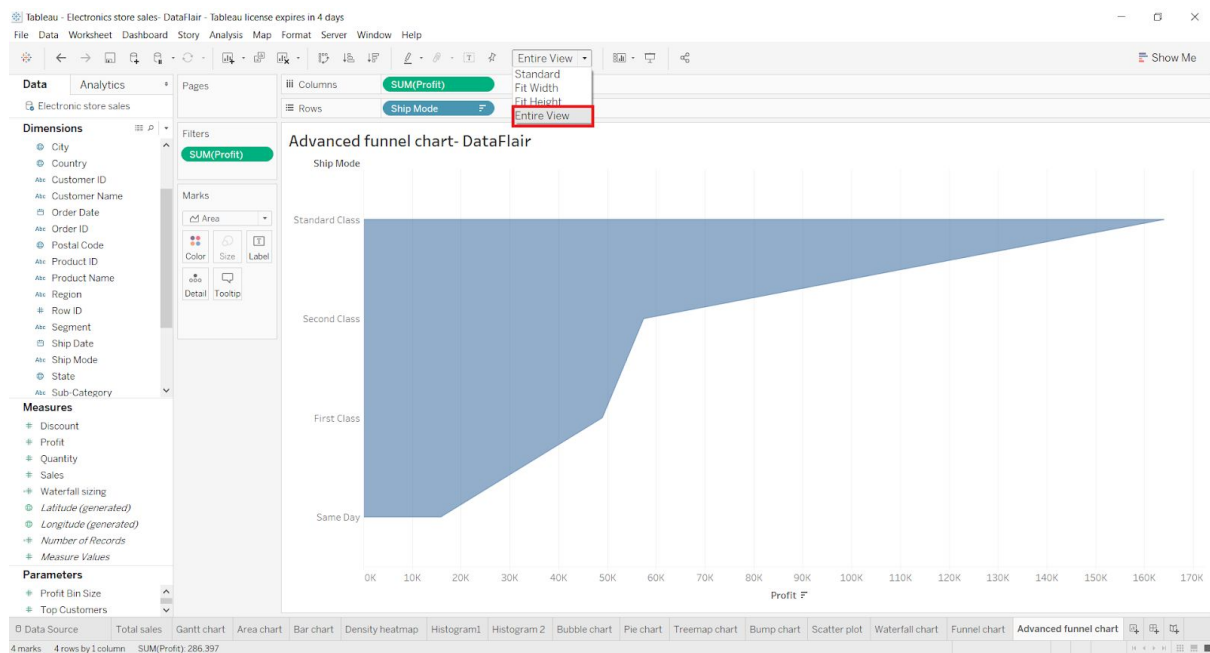
Followed by this, we click on the icon to apply a nested sort which is descending by sum of profit.



Now, we open the mark type drop-down list and select the Area option from it. This creates a continuous area covering all the horizontal bars that were in the *bar chart*.

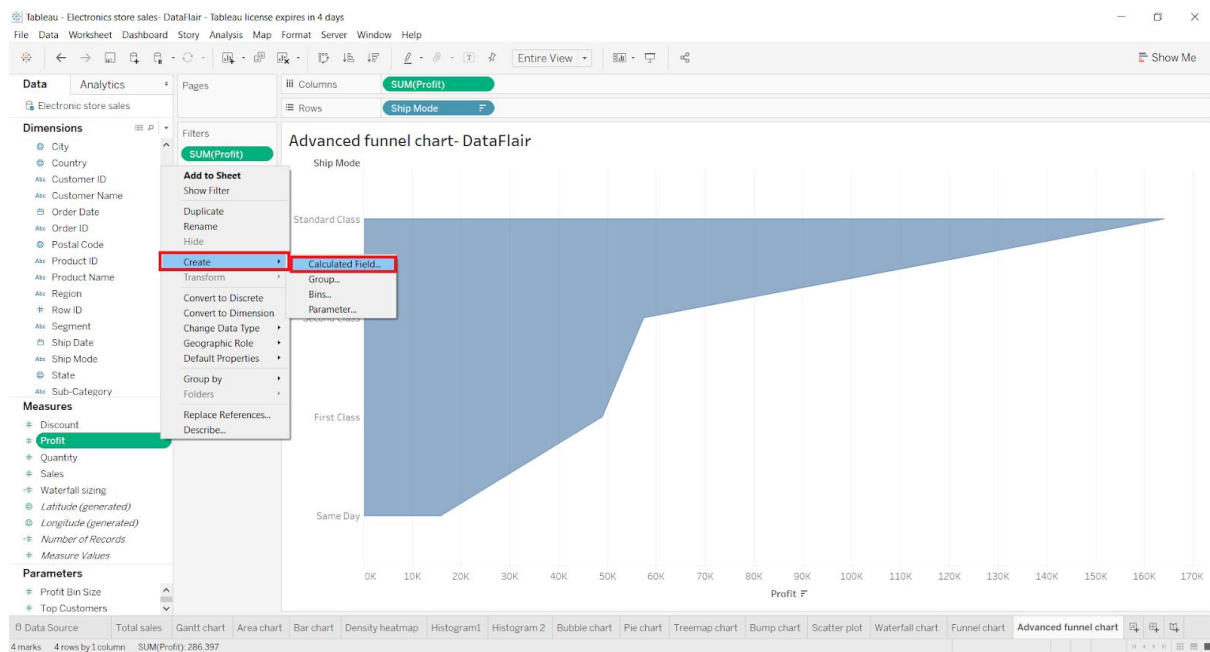


Change the view type from Standard to Entire View.

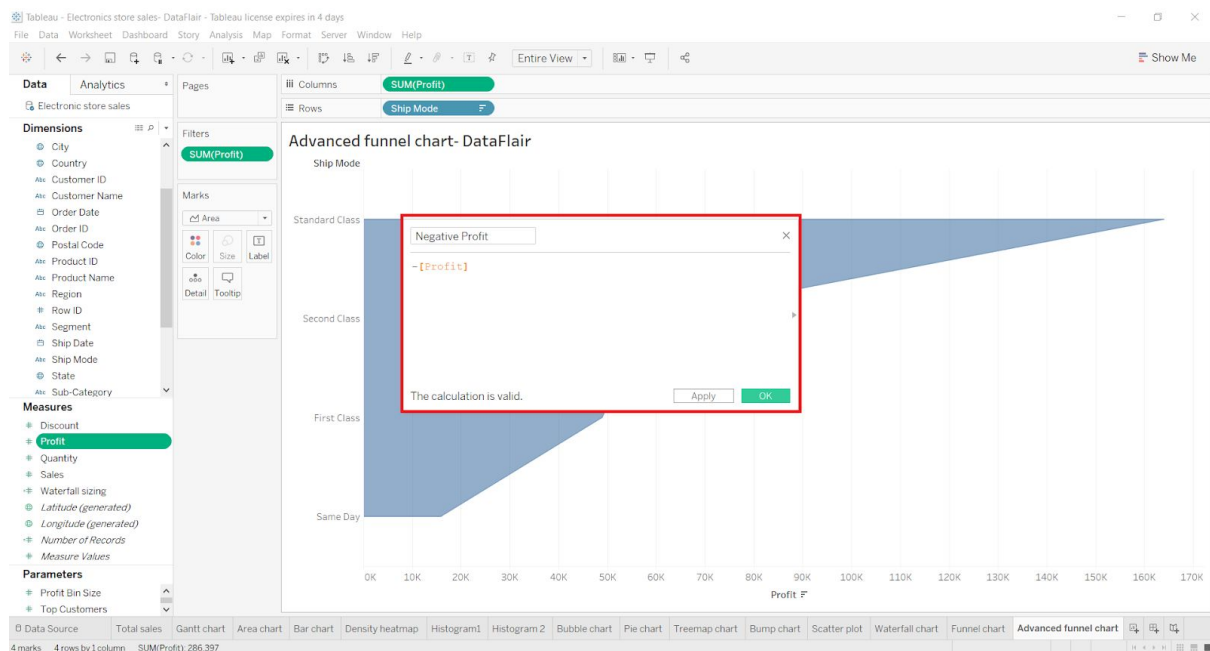


Step 3: Create a Calculated Field

Now, we'll right-click on our measure named Profit and select Create and then opt for Calculated Field... . With this option, we will create a calculated field. In the calculated field dialog, we enter our formula that is $-[Profit]$. Also, we name this calculated field as Negative Profit.

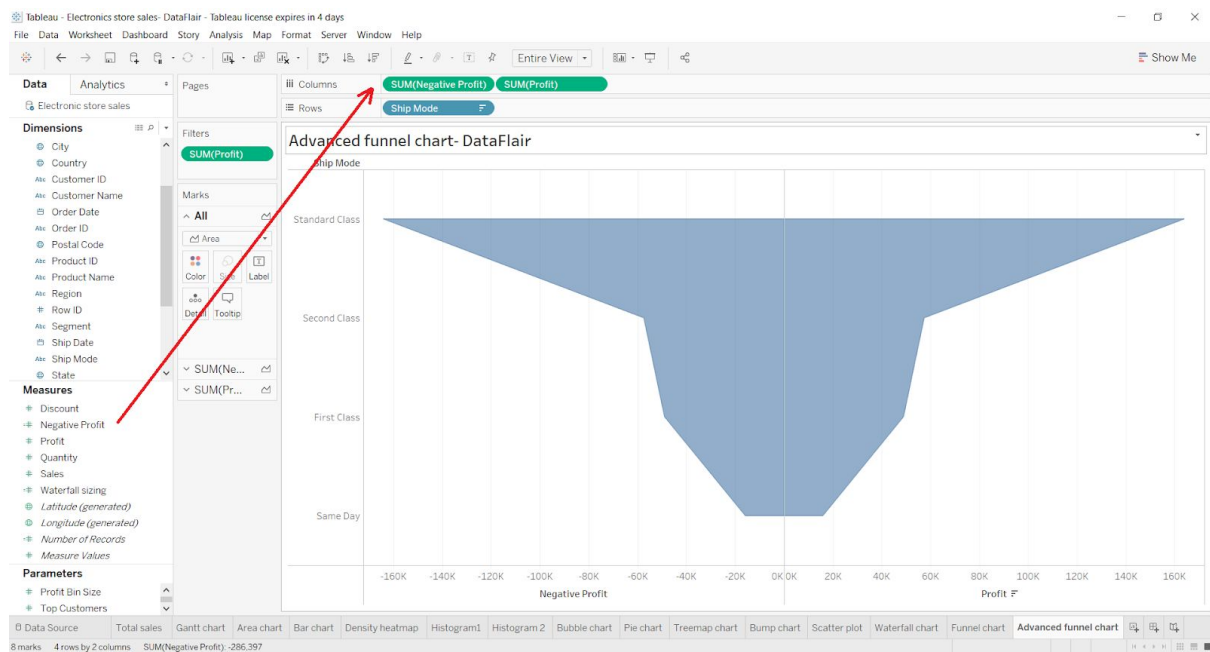


We apply the formula by clicking on Apply and then OK.

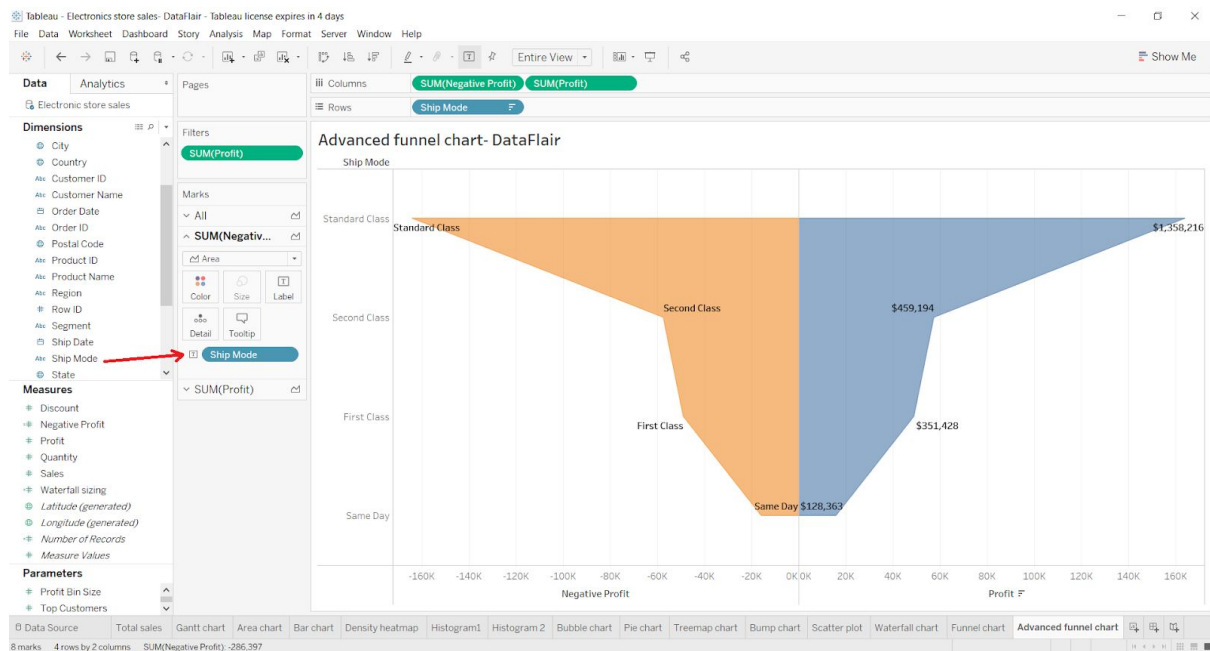


Step 4: Add Negative Profit in Column Section

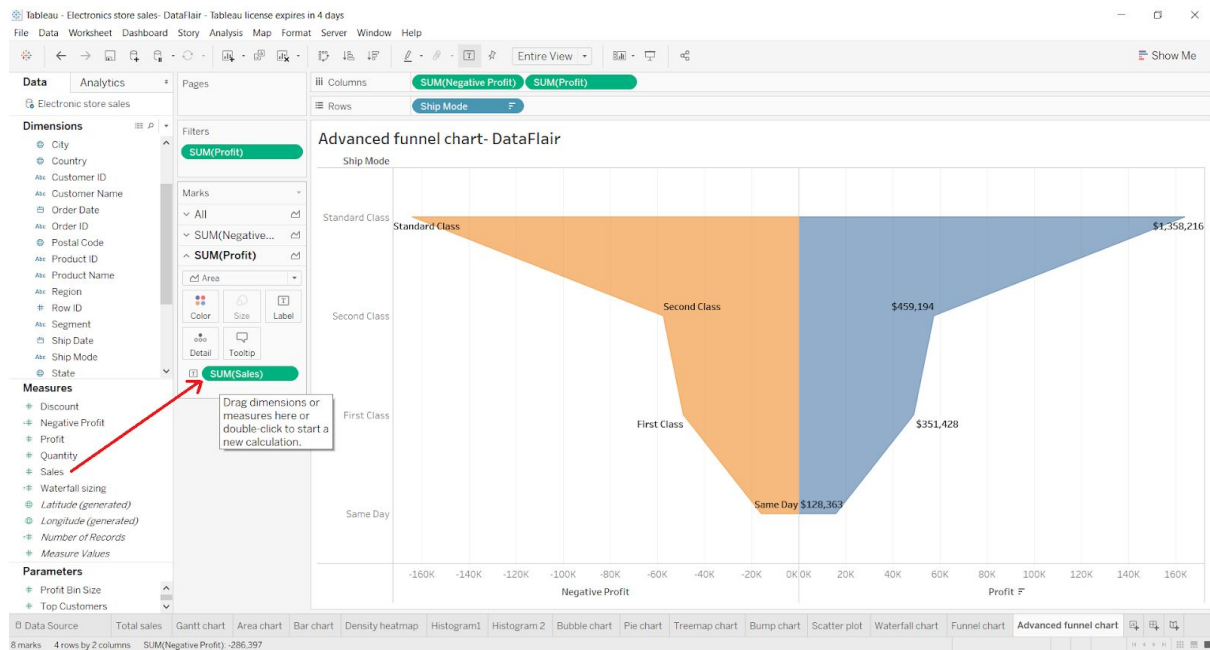
As soon as we apply the formula for the calculated field, the new field name will appear on the Measures list. We take the newly created Negative Profit field and put it in the Columns section. This will add one more field on the chart giving it a funnel-like shape.



Step 5: Now, we add a dimension called Ship Mode to the Label card present in the Marks section. This will add text labels showing shipping modes on the left of the chart. Also, we give a distinct color to the left half of our funnel chart that shows a negative profit.



Similarly, we add a measure named Sales or SUM(Sales) in the Labels card of Marks section. This adds labels pertaining to total sales on the right half of the funnel chart.



Step 6: In this way, we made an advanced, also known as smooth funnel chart in tableau .

