COMPARISON OF REGION BASED ON SALES BY USING TABLEAU

Creating a Dashboard of Region wise Sales

- Prerequisites

1. Hierarchy - Represents the level-wise configuration.
2. Parameters - A variable group have number, date, or string that can replace a constant value in a calculation, filter, or reference line.
3. Calculated fields - Creates calculated dimensions, such as segments, or new measures, such as ratios, sums, average, minimum, maximum that the user required from the whole dataset.
4. Dashboard - Displays several views and compares a variety of data simultaneously in easier and presenting manner.

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.

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STEPS TO PREPARING A REGION WISE SALES DASHBOARD

1. Using Sample Superstore CSV Dataset

2. Importing Same Data CSV File in Tableau

3. Created two measures Primary measure (sheet named as P_Measures) & Secondary Measures (sheet named as S_Measures)

- P_Measures consists following by using calculated fields, show in the upper dropdown on top of the measures & dimensions for the region West :-
  a. First order Date
  b. Total Sales
  c. Average Sales Per Order
  d. No. of Customers
  e. No. of Order
  f. No. of Product in Sales
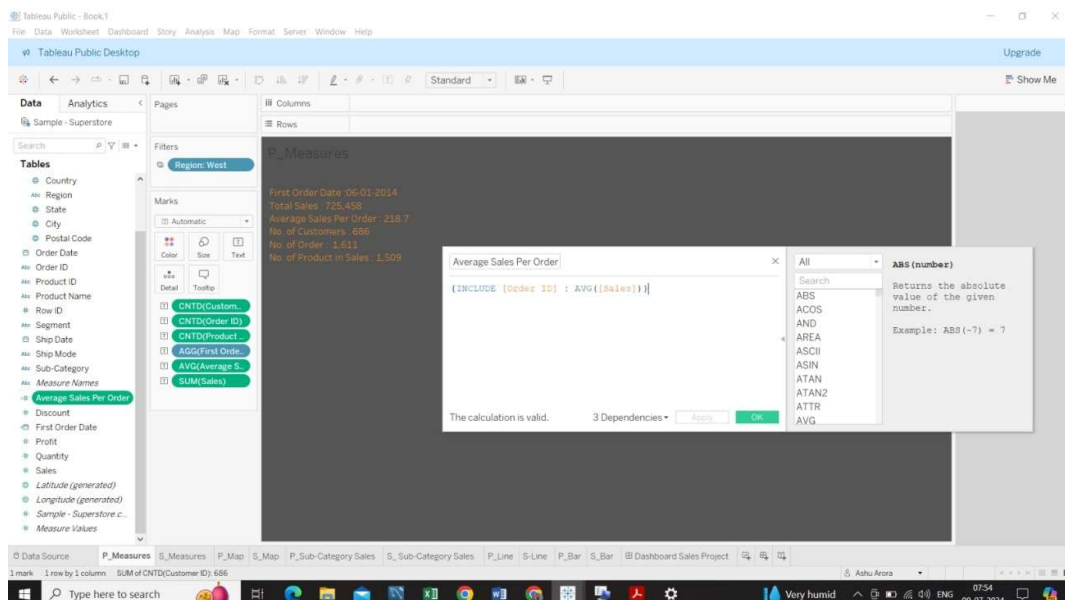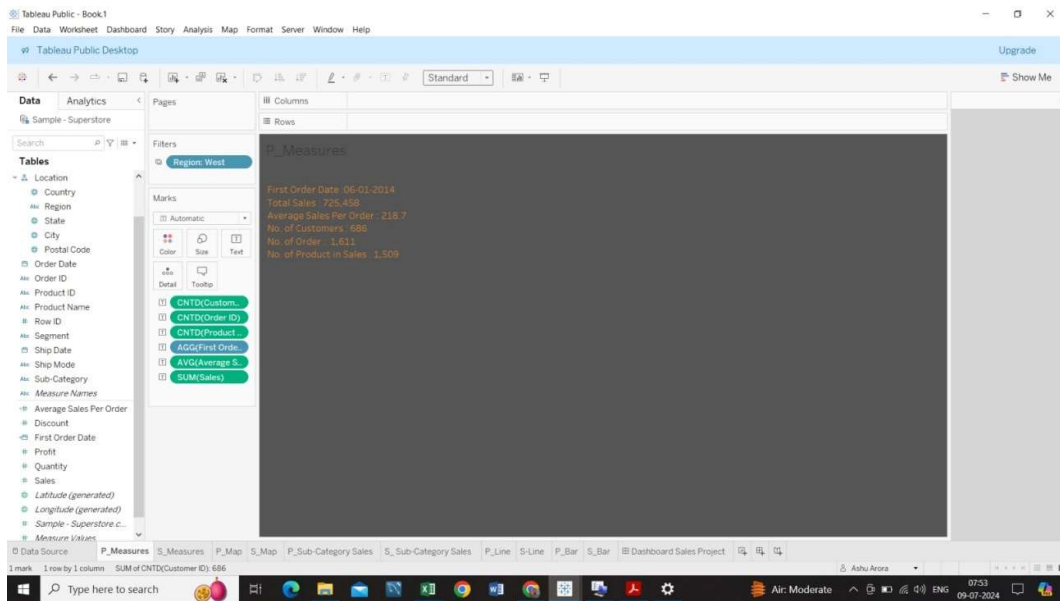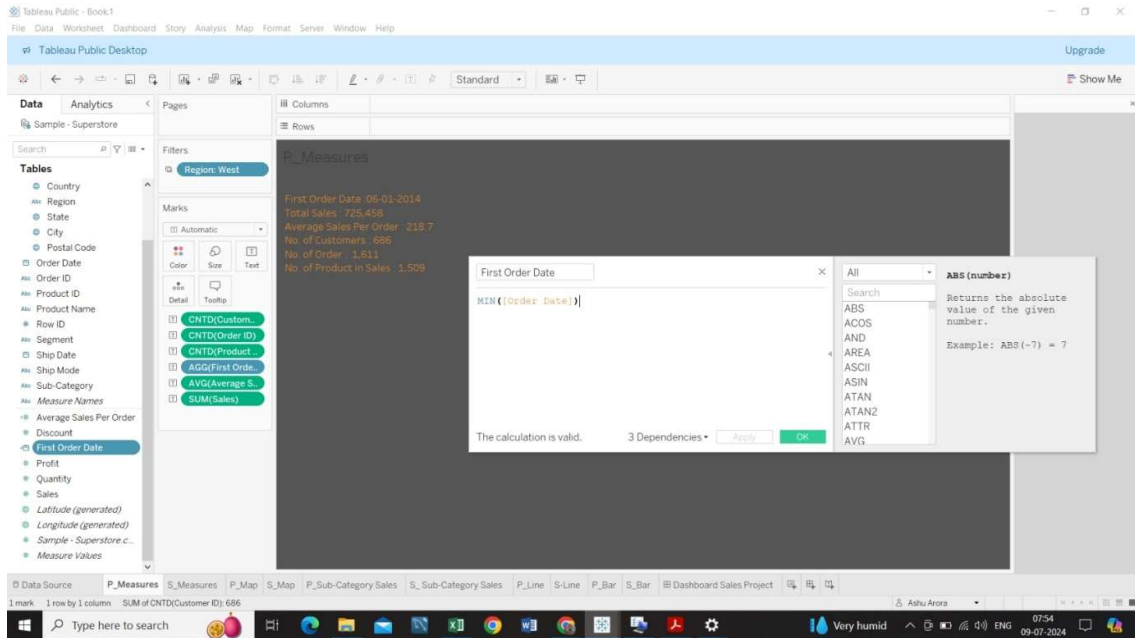
- To format Measures & Dimensions in the P_Measures, use Format Tab on the top Ribbon Bar
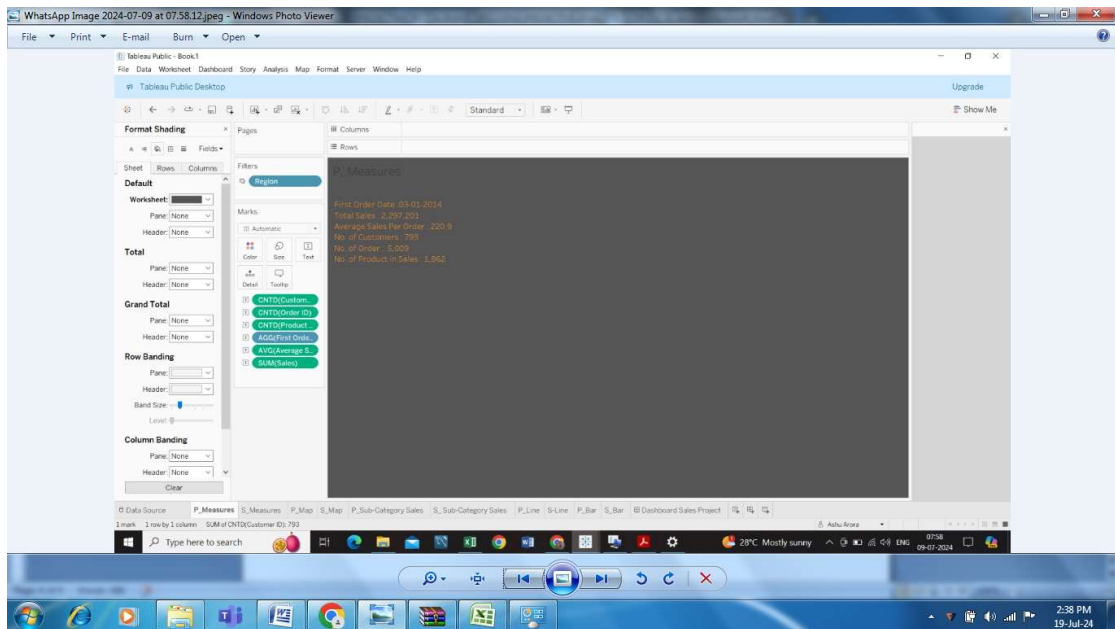
- S_Measures consists following by using calculated fields, show in the upper dropdown on top of the measures & dimensions for the region South :-
  - g. First order Date
  - h. Total Sales
  - i. Average Sales Per Order
  - j. No. of Customers
  - k. No. of Order
  - l. No. of Product in Sales
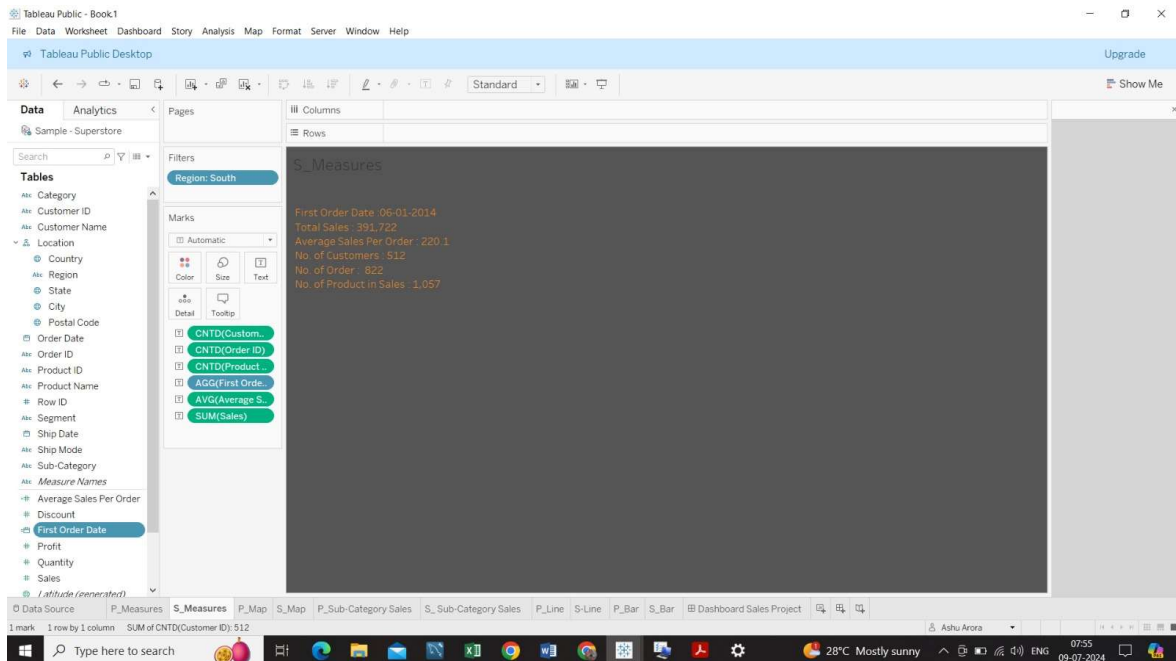
4. Created two sheets P_Map & S_Map refer to Primary Map for Various Regions & Secondary Maps for the Various Region respectively.

- P_Map created by using following Measures & Dimenssions :
  - i. Measures : Sum of Sales
  - ii. Dimensions : Country, State & region

- To format Map Background, title etc. in the P_Map, use Format Tab on the top of the Ribbon Bar
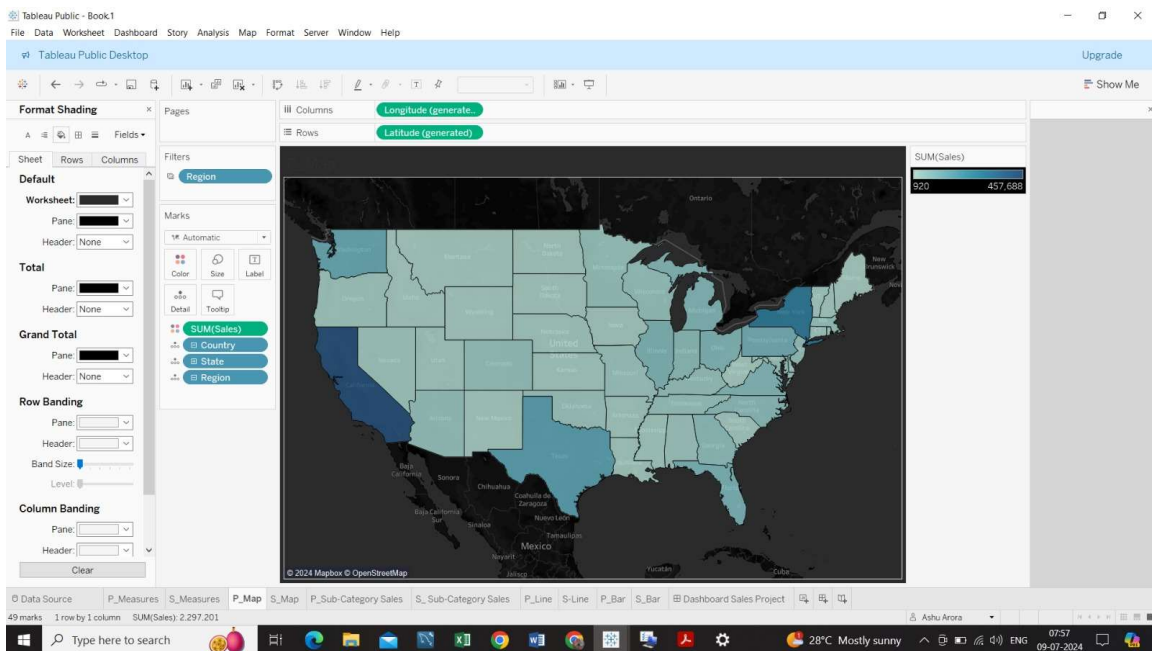
- S_Map created by using following Measures & Dimensions :
    i.   Measures : Sum of Sales
    ii.   Dimensions : Country, State & region
- To format Map Background, title etc. in the S_Map, use Format Tab on the top of the Ribbon Bar
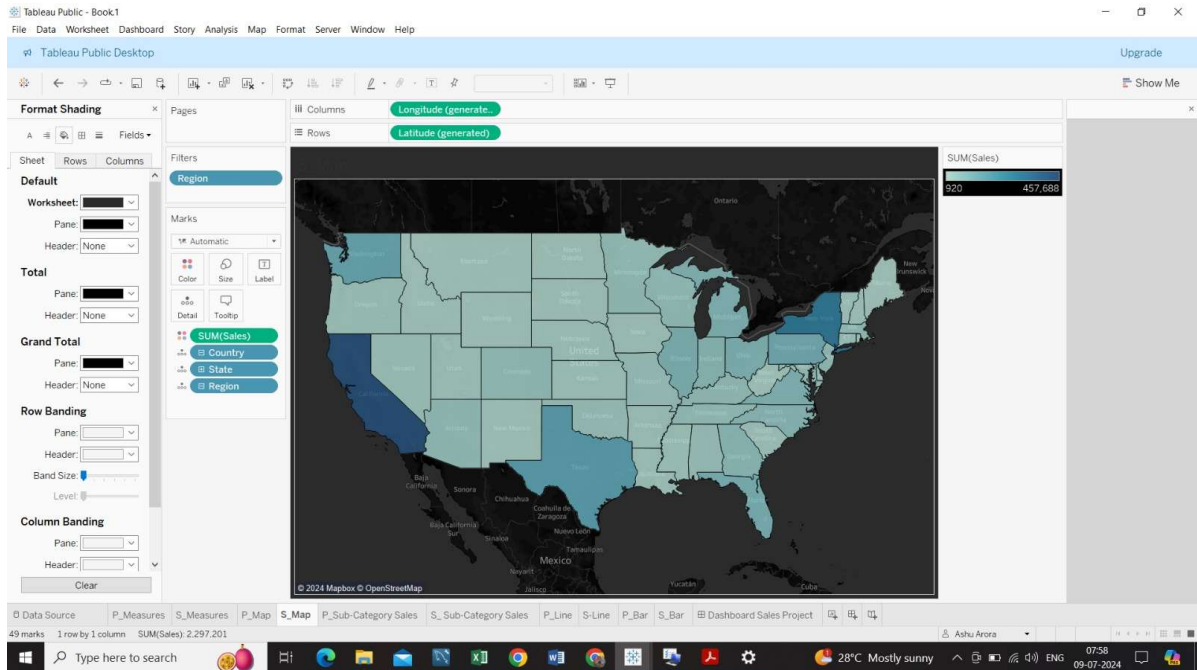
5. Created P_Sub_Category_Sales Sheet refers to the sales based on Sub Category at each region. This again showing the Total Sales, Minimum Sales & Maximum Sales for each sub category region wise. Where measures are : Sum of sales, by using aggregate function we have used minimum sales & maximum sales for the dimension sub-category region wise.
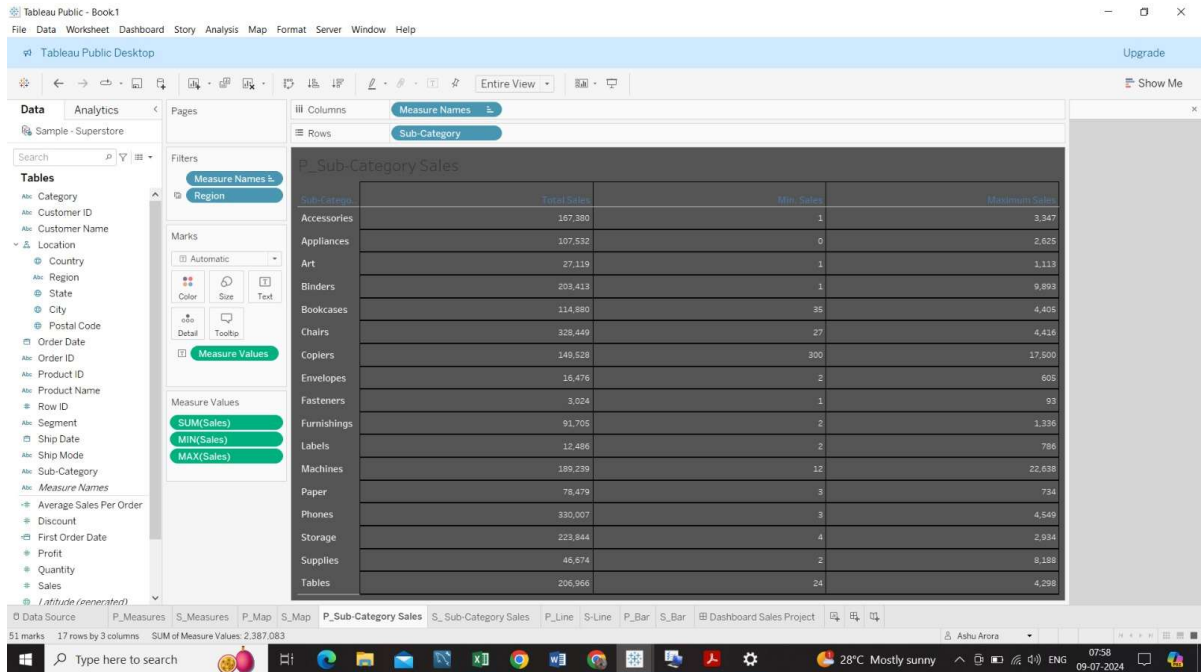
- To format Measures & Dimensions in the P_Sub_Category, use Format Tab on the top Ribbon Bar
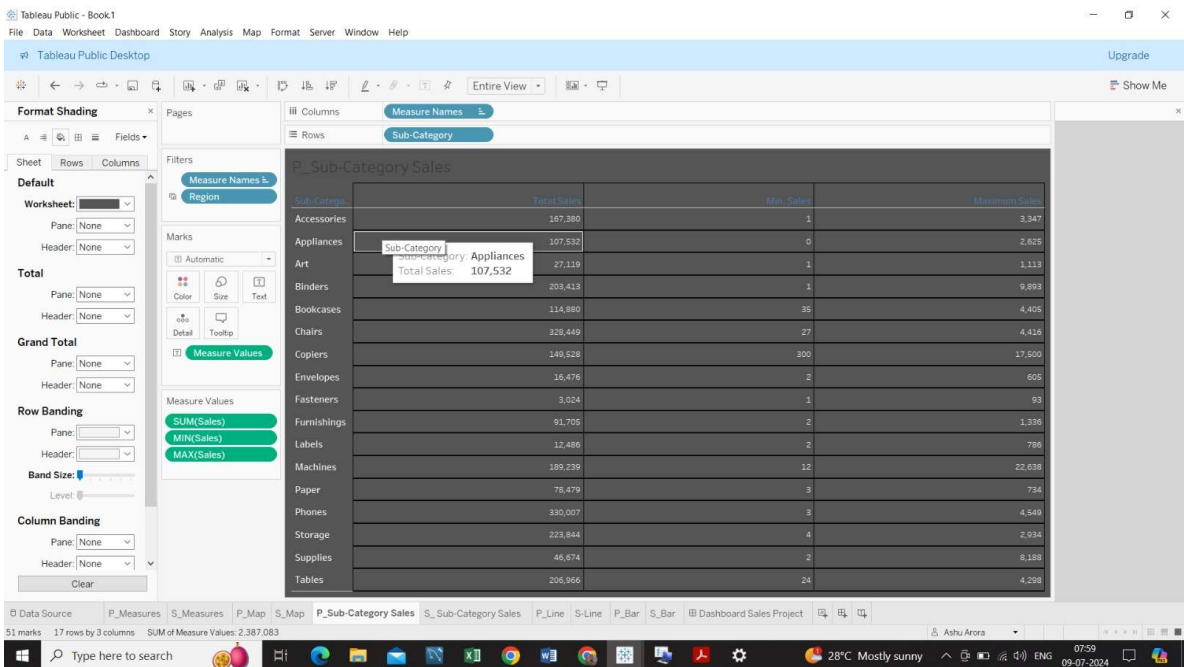
6. Created S_Sub_Category_Sales Sheet refers to the sales based on Sub Category at each region. This again showing the Total Sales, Minimum Sales & Maximum Sales for each sub category region wise. Where measures are : Sum of sales, by using aggregate function we have used minimum sales & maximum sales for the dimension sub-category region wise.
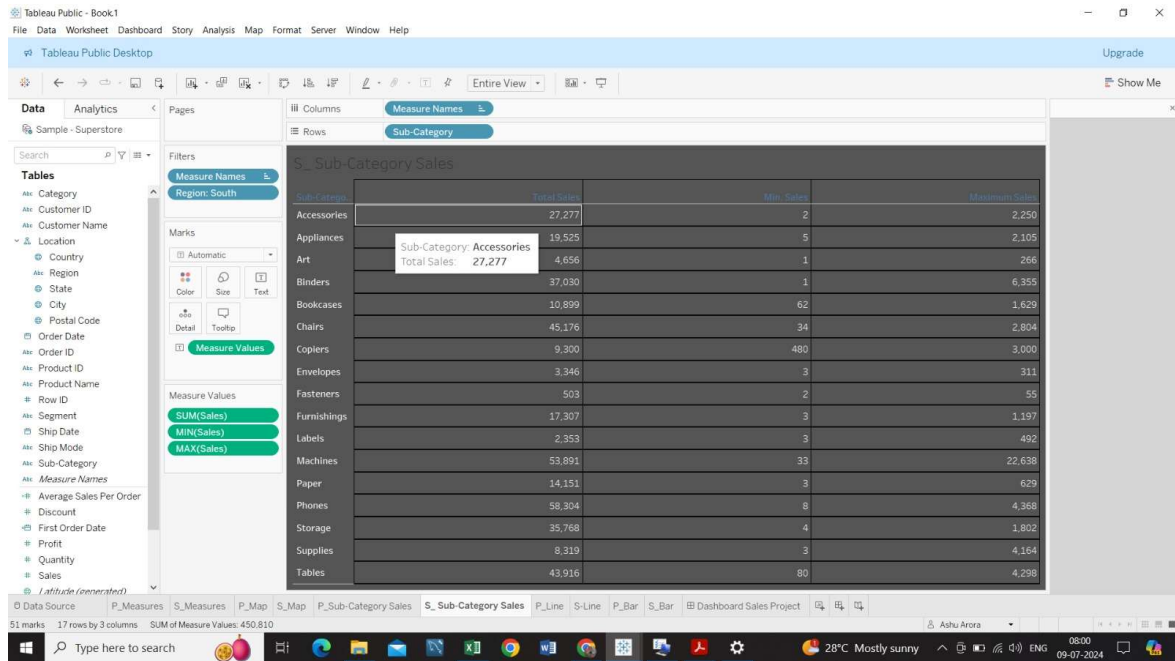
- To format Measures & Dimensions in the S_Sub_Category, use Format Tab on the top Ribbon Bar
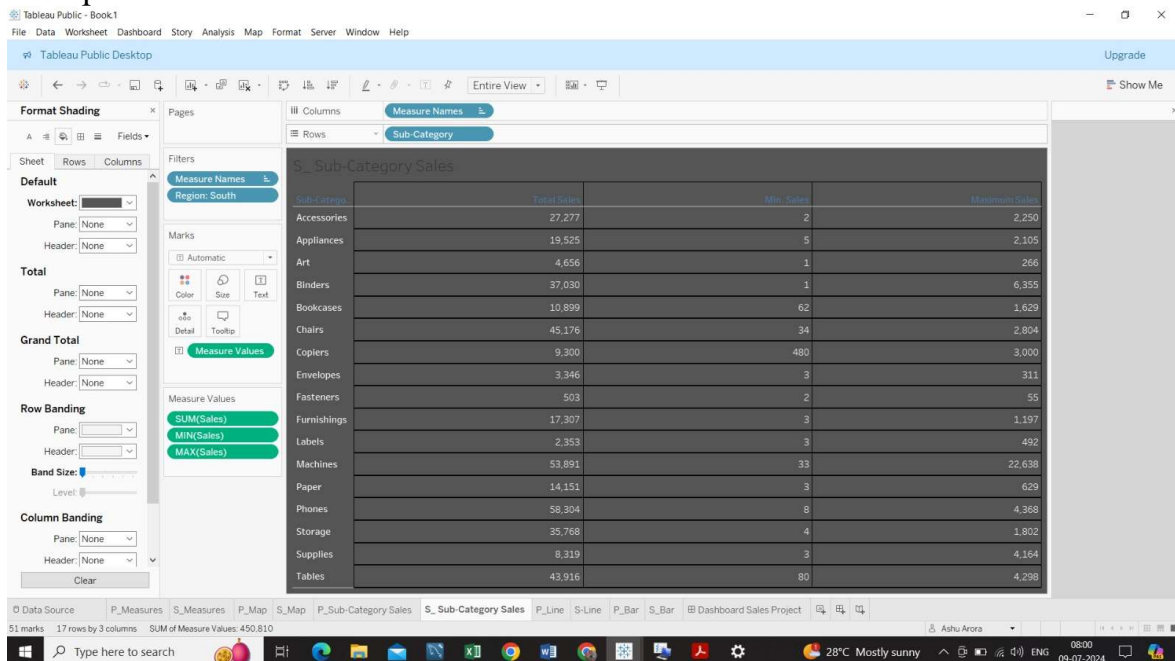
7. Created P_Line Sheet refers to the Primary Line sheet. Here data is based on the sales based on date wise order of Sub Category based on each region. Here the segment is showing based on the week.
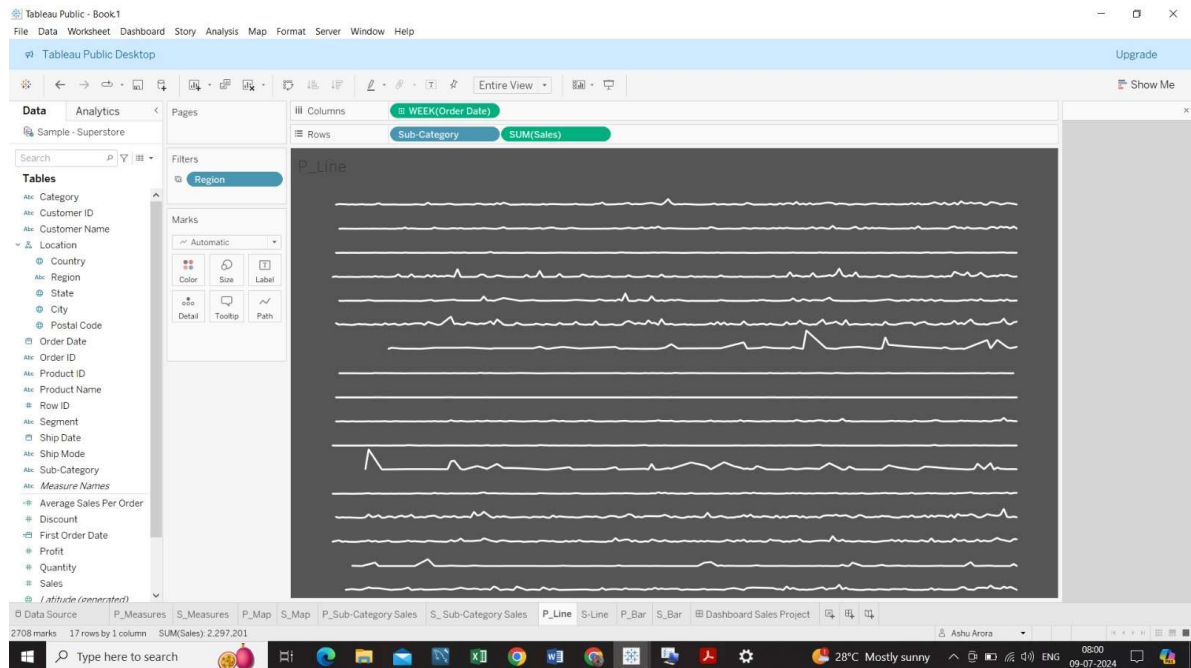
- To format Measures & Dimensions in the P_Line, use Format Tab on the top Ribbon Bar.
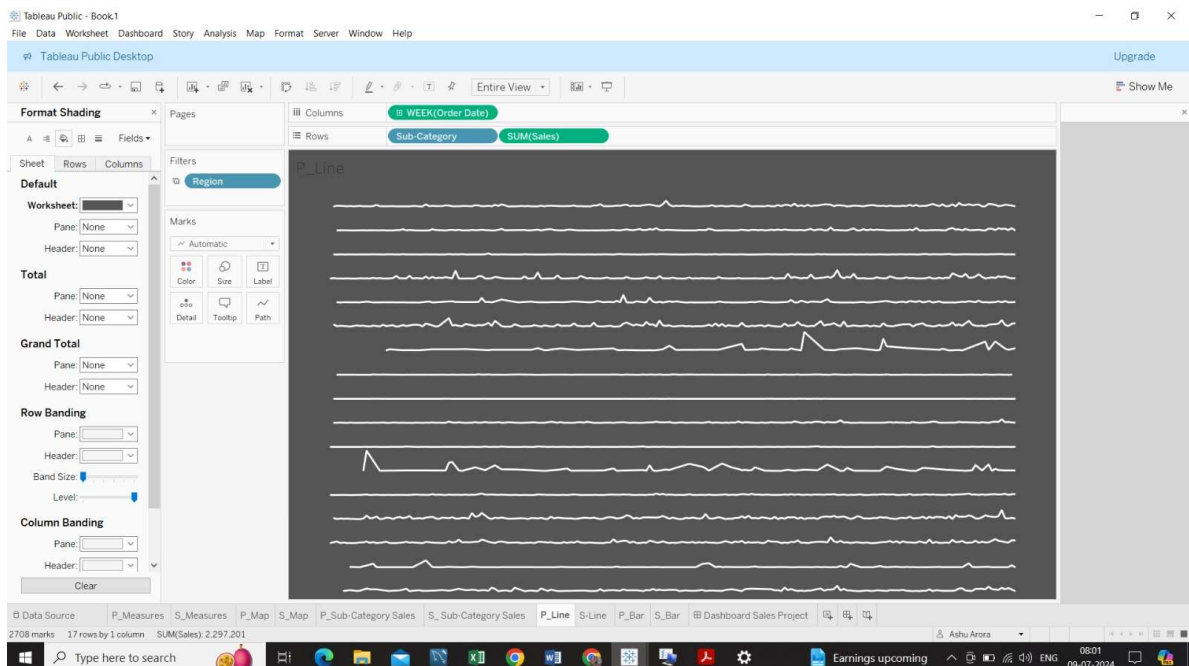
8. Created S_Line Sheet refers to the Secondary Line sheet. Here data is based on the sales based on date wise order of Sub Category based on each region. Here the segment is showing based on the week.
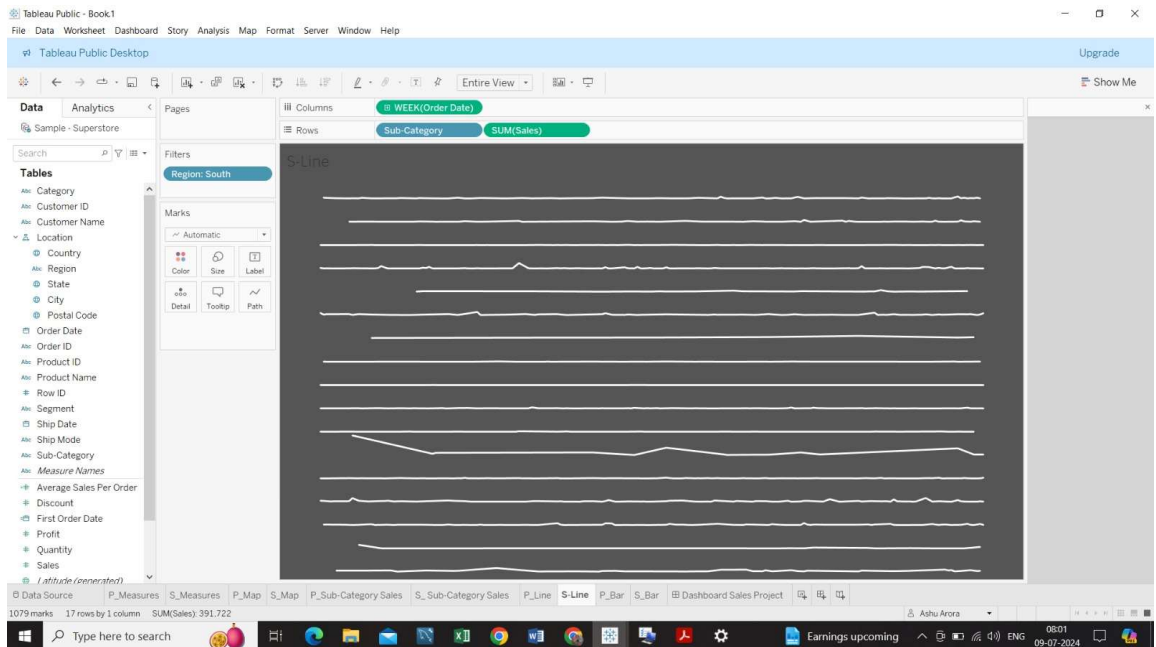
- To format Measures & Dimensions, Axis & Background etc. line in the S_Line, use Format Tab on the top of the Ribbon Bar.
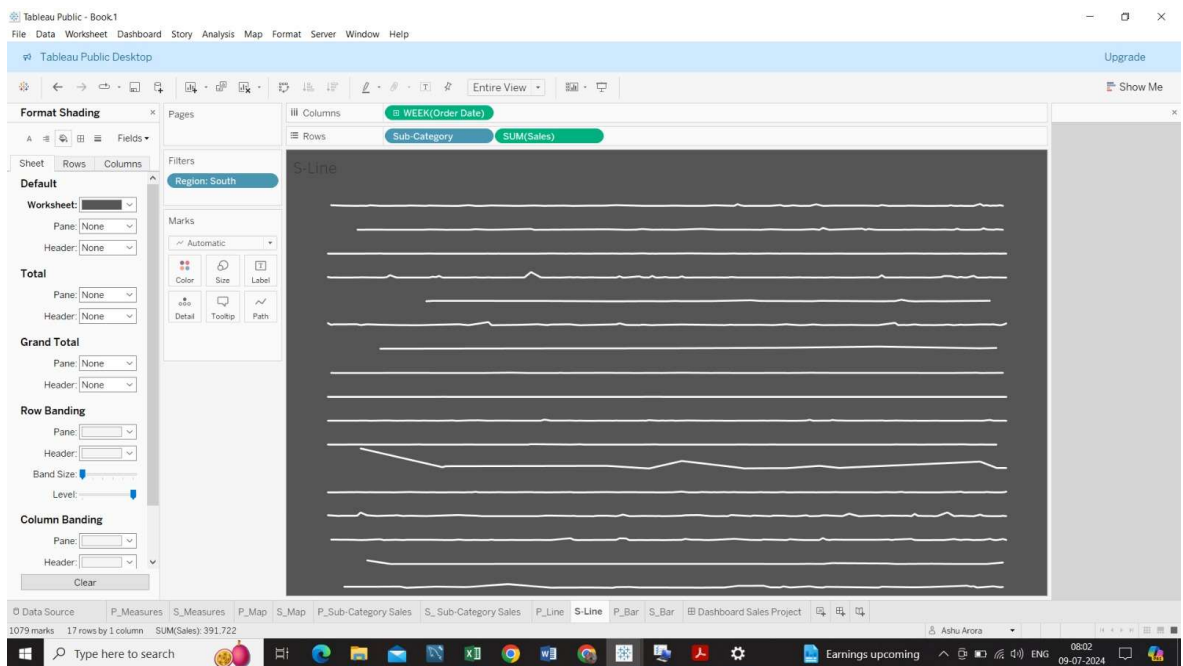
9. Created P_Bar Sheet refers to the Primary Line sheet. Here data is shown in Bar Chart of sum of total sales of each sub category.
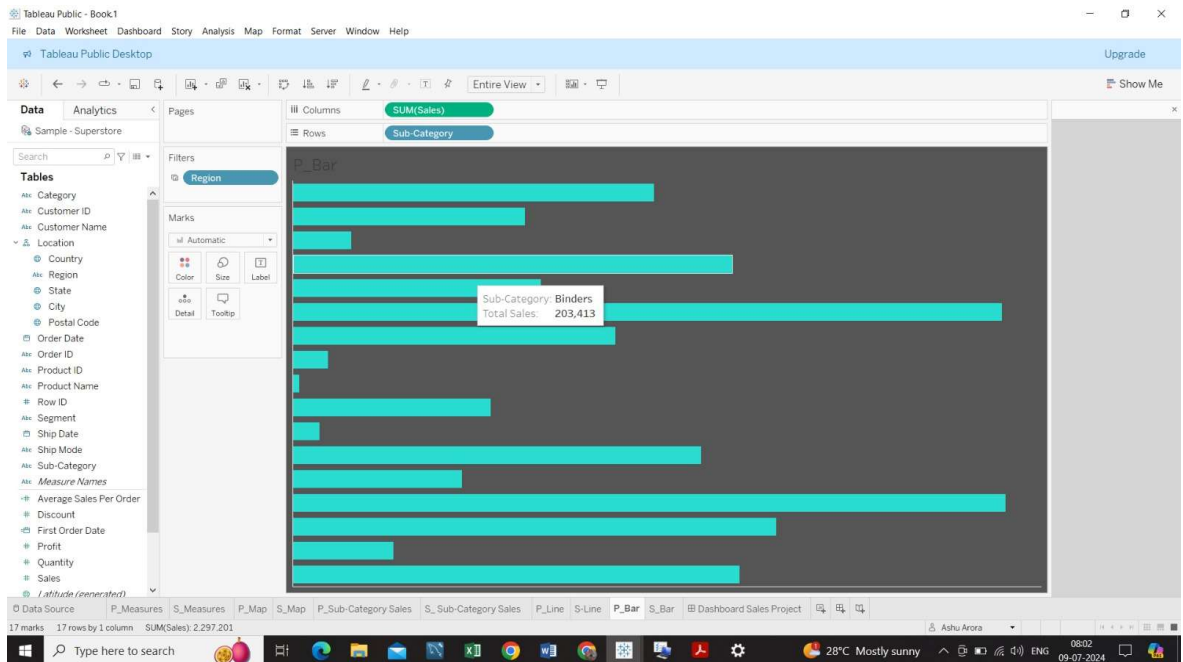
- To format Measures & Dimensions, Background & Bar Colour etc.in P_ line, use Format Tab on the top of the Ribbon Bar.
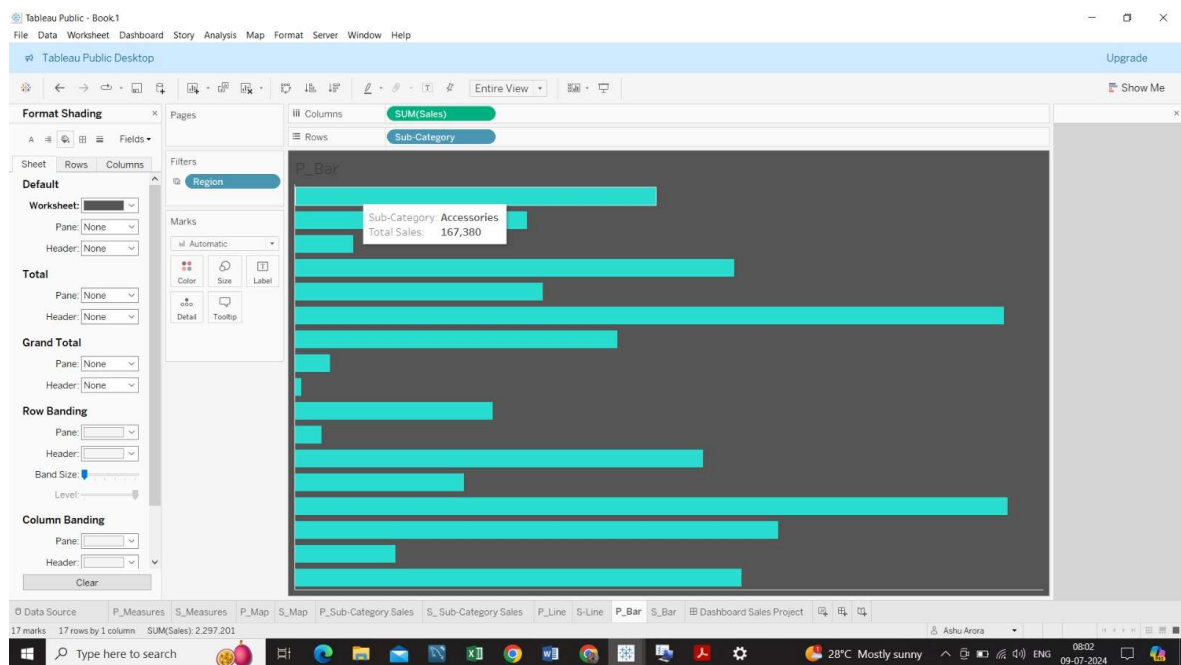
10. Created S_Bar Sheet refers to the Secondary Line sheet. Here data is shown in Bar Chart of sum of total sales of each sub category.
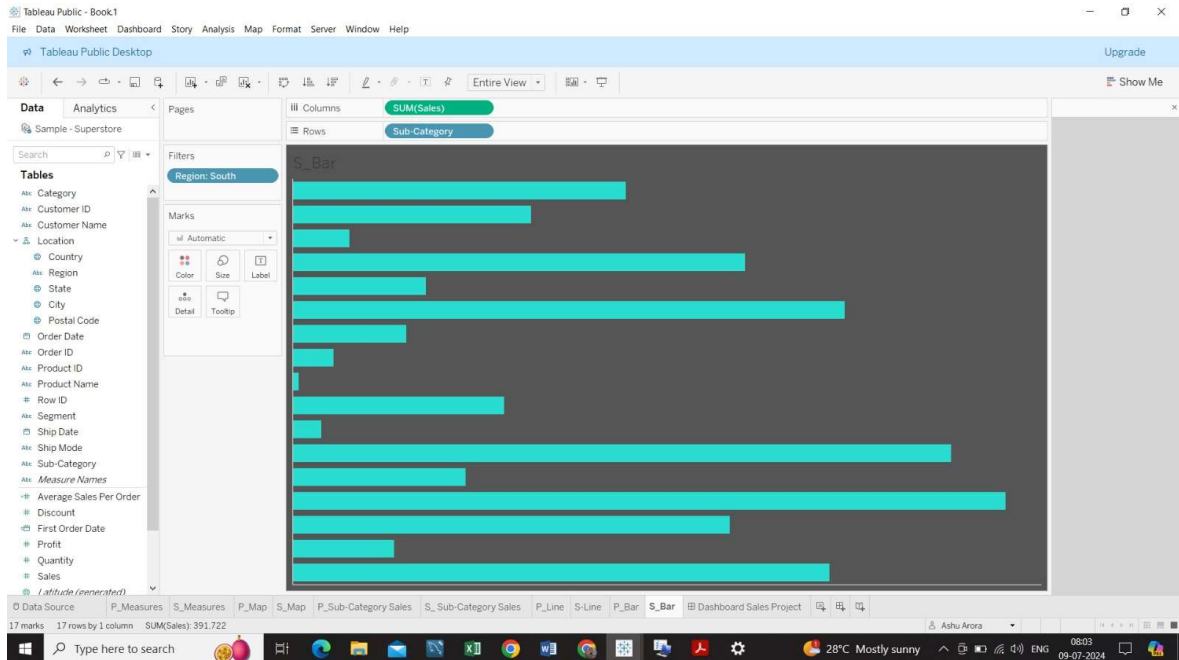
- To format Measures & Dimensions, Background & Bar Colour etc.in S_ line, use Format Tab on the top of the Ribbon Bar.
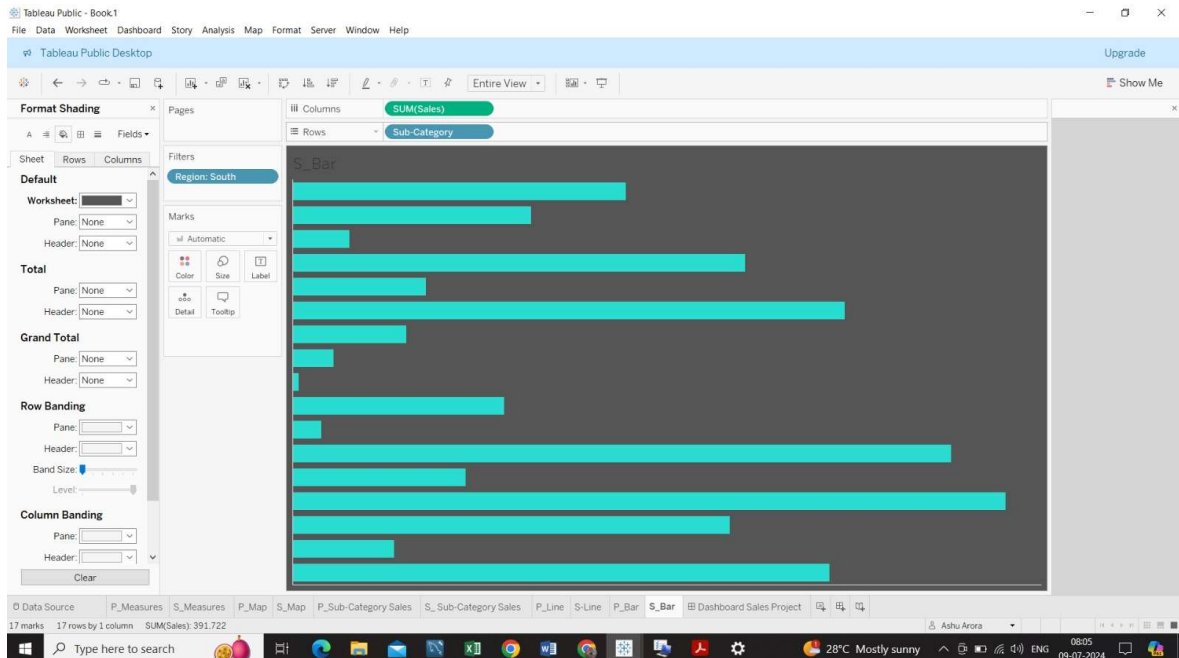
CREATION OF SALES DASHBOARD

❖ Sheet to be used in preparing Region wise comparative Sales Dashboard

1. P_Measures
2. S_Measuers
3. P_Map
4. S_Map
5. P_Sub_Cateogry_Sales
6. S_Sub_Cateogry_Sales
7. P_Line
8. S_Line
9. P_Bar
10. S_Bar

❖ Steps Used to Creating Region wise Sales Dashboard :

1. In objects clicked on Horizontal Container, set the dashboard automatic layout.
2. Adjust Horizontal & Vertical Margins as per the requirement.
3. Click on Text Option in the object Column of Dashboard to give the Title to the Dashboard which is "Sales Comparison by region".
4. In the Left Margin of Sheets the above sheets mentioning above from S.No. 1 to S.No. 10 inserted in the Dashboard Layout margins as required after clicking the Tiled option give below. Also used the Floating option where ut is required.
5. Format the background of the same dashboard after clicking on the Format option given on the Ribbon Bar on the top.
6. Remove all the titles of all the inserted sheets in the dashboard.
7. Added a Filter based on the Region after clicking the right click on the P_Map & S_Map sheets. This Filter is giving the actual comparison of sales among all the Four Region i.e. East, West, South, North & Central in all the countries of the continents, based on dates, categories, and sub-categories. Also showing the comparison between maximum, minimum & Totals sales in the each region of the continent.

Comparison of total sales between Central & South region

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Tableau Public Desktop   Upgrade

Show Me

Dashboard   Layout

Default
Phone
Device Preview

Size
Automatic

Sheets
P_Measures
S_Measures
P_Map
S_Map
P_Sub-Catego...
S_Sub-...
P_Line
S_Line

Objects
Horizontal Container
Vertical Container
Text
Extension
Data Story
Image
Blank

Tiled   Floating

Show dashboard title

Sales Comparison By Region

Primary Region

Region
Central

First Order Date :03-01-2014
Total Sales : 501,240
Average Sales Per Order : 212.2
No. of Customers : 629
No. of Order : 1,175
No. of Product in Sales : 1,310

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Secondary Region

Region
South

First Order Date :06-01-2014
Total Sales : 391,722
Average Sales Per Order : 220.1
No. of Customers : 512
No. of Order : 822
No. of Product in Sales : 1,057

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Sub-Categor	Total Sales	Min. Sales	Maximu
Accessories	33,956	2	1,929
Appliances	23,582	0	2,405
Art	5,765	1	210
Binders	56,923	1	9,893
Bookcases	24,157	68	2,396
Chairs	85,231	27	3,505
Copiers	37,260	320	17,500
Envelopes	4,637	2	605
Fasteners	778	2	58
Furnishings	15,254	2	1,336
Labels	2,451	2	492
Machines	26,797	84	8,160
Paper	17,492	4	629
Phones	72,403	6	2,736
Storage	45,930	9	1,555
Supplies	9,467	2	4,164
Tables	39,155	67	2,679

Sub-Categor	Total Sal	Min. Sal	Maximu
Accessories	27,277	2	2,250
Appliances	19,525	5	2,105
Art	4,656	1	266
Binders	37,030	1	6,355
Bookcases	10,899	62	1,629
Chairs	45,176	34	2,804
Copiers	9,300	480	3,000
Envelopes	3,346	3	311
Fasteners	503	2	55
Furnishings	17,307	3	1,197
Labels	2,353	3	492
Machines	53,891	33	22,638
Paper	14,151	3	629
Phones	58,304	8	4,368
Storage	35,768	4	1,802
Supplies	8,319	3	4,164
Tables	43,916	80	4,298

Data Source | P_Measures | S_Measures | P_Map | S_Map | P_Sub-Category Sales | S_Sub-Category Sales | P_Line | S-Line | P_Bar | S_Bar | Dashboard Sales Project

13 marks   1 row by 1 column   SUM(Sales): 501,240

Ashu Arora

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