

# FUNNEL CHARTS

Funnel charts are generally used to view and analyze a measure e.g: Sales, Profit across various stages, segments, categories or partitions in the data

Given below are the 3 things that can be observed in a Funnel Chart:

1. Order in which the Size of the measure is going down
2. Size of the different boxes i.e., bigger the size of the box the bigger is the measure
3. Each category or segment will have a different color. Categorical color palette is assigned to the categories, stages or segments

# FUNNEL CHARTS

A funnel chart is a specialized chart type that is typically used to display the flow of users through a business or sales process.

The chart gets its name from its shape, which starts from a broad head and ends in a narrow neck.

The number of items at each stage of the process are indicated from the funnel's width as it narrows.

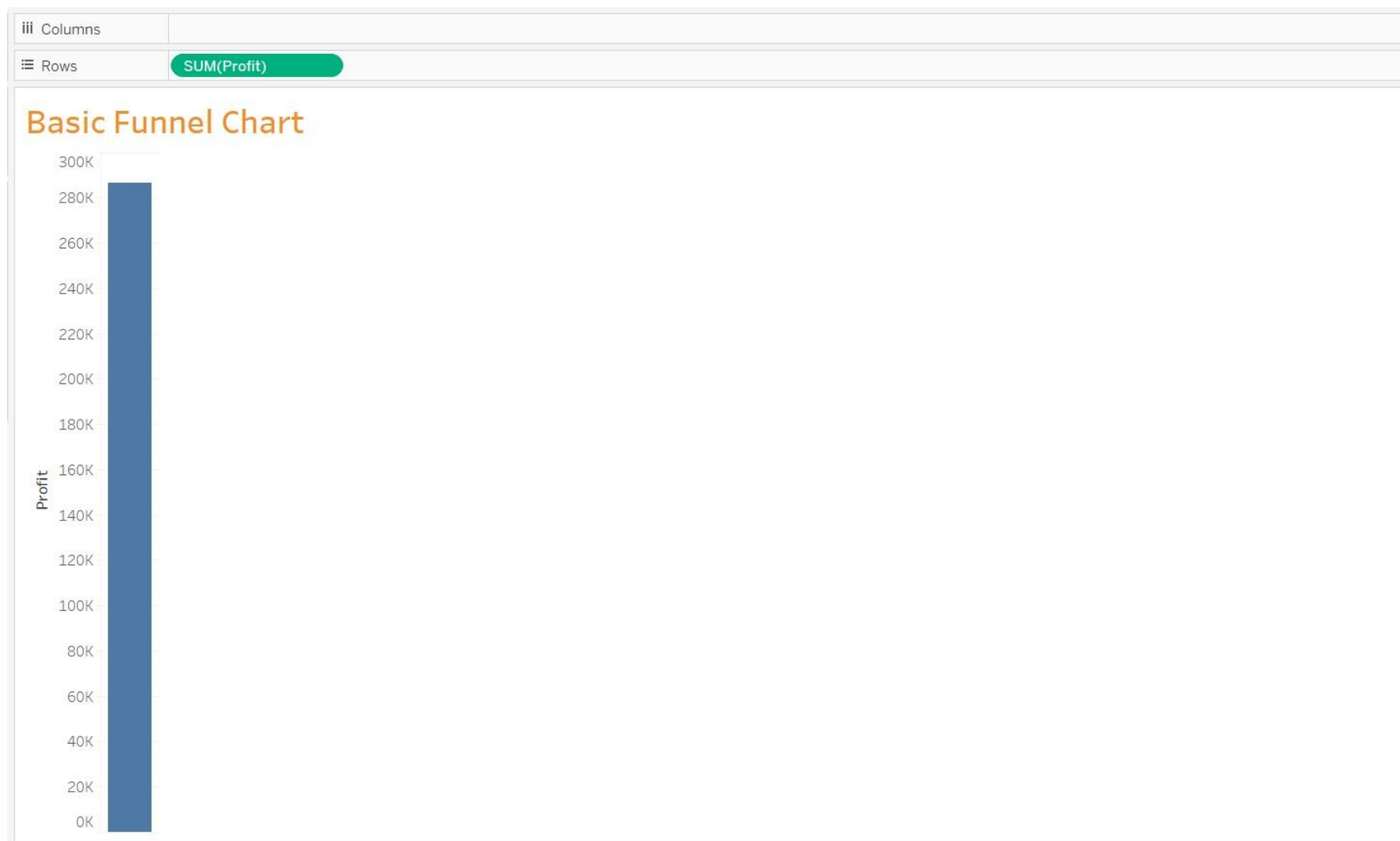
We will go through two types

Basic Funnel Chart

Advanced Funnel Chart

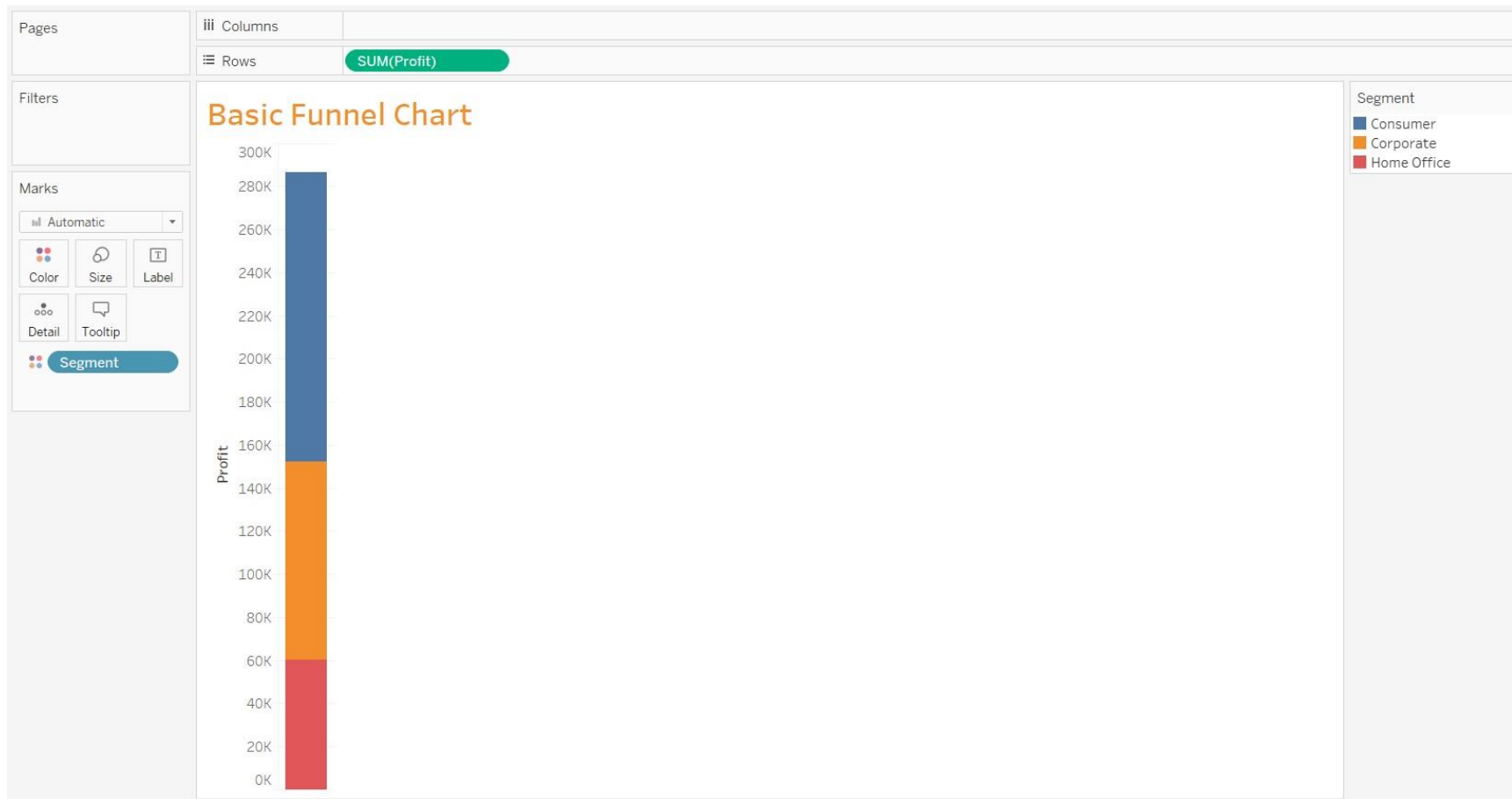
# STEPS TO CREATE A BASIC FUNNEL CHART

**STEP 1:** Drag and drop **Profit** to the **Rows** shelf



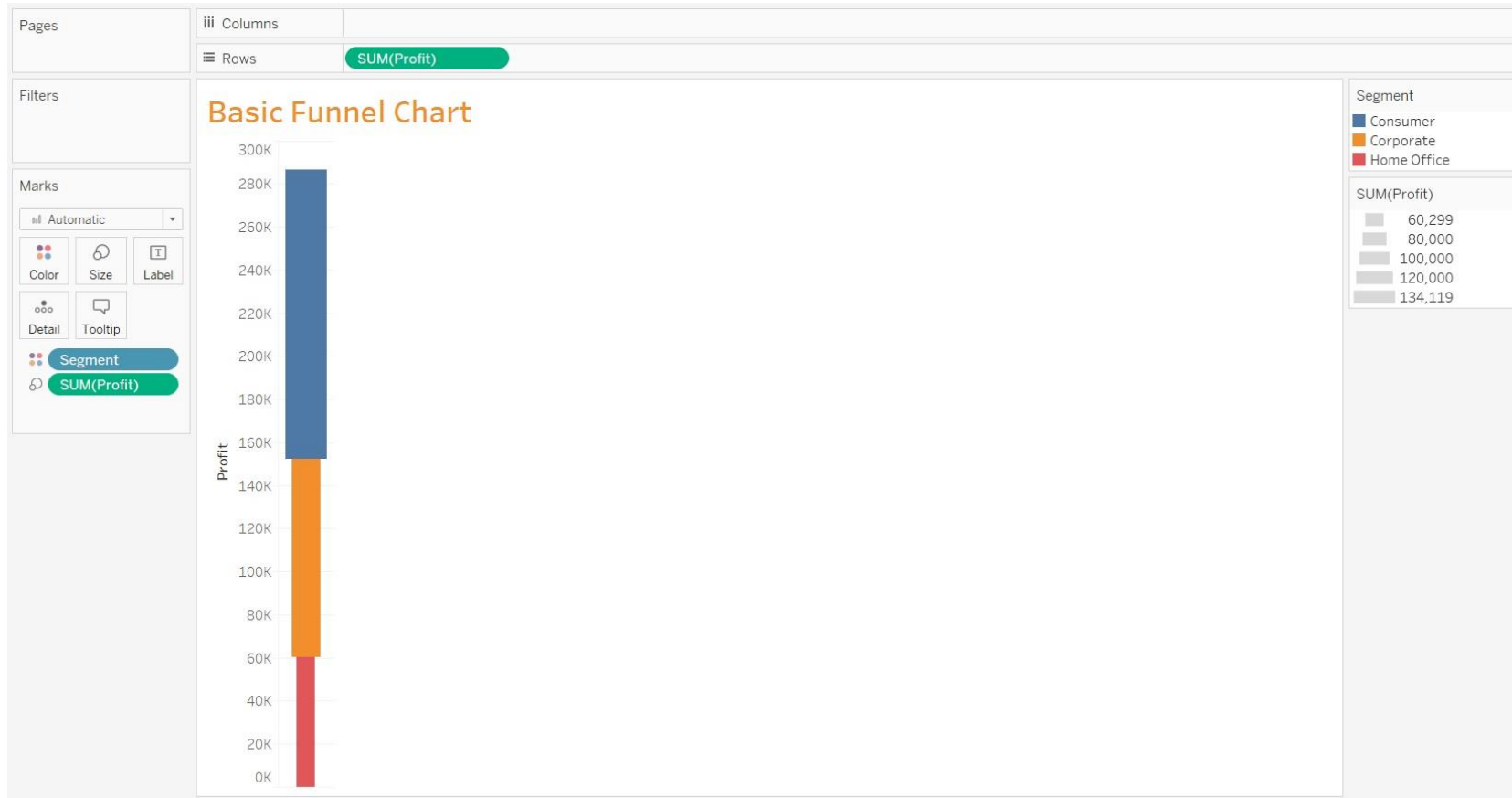
# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 2: Drag and drop **Segment** to the **Color** on **Marks** card



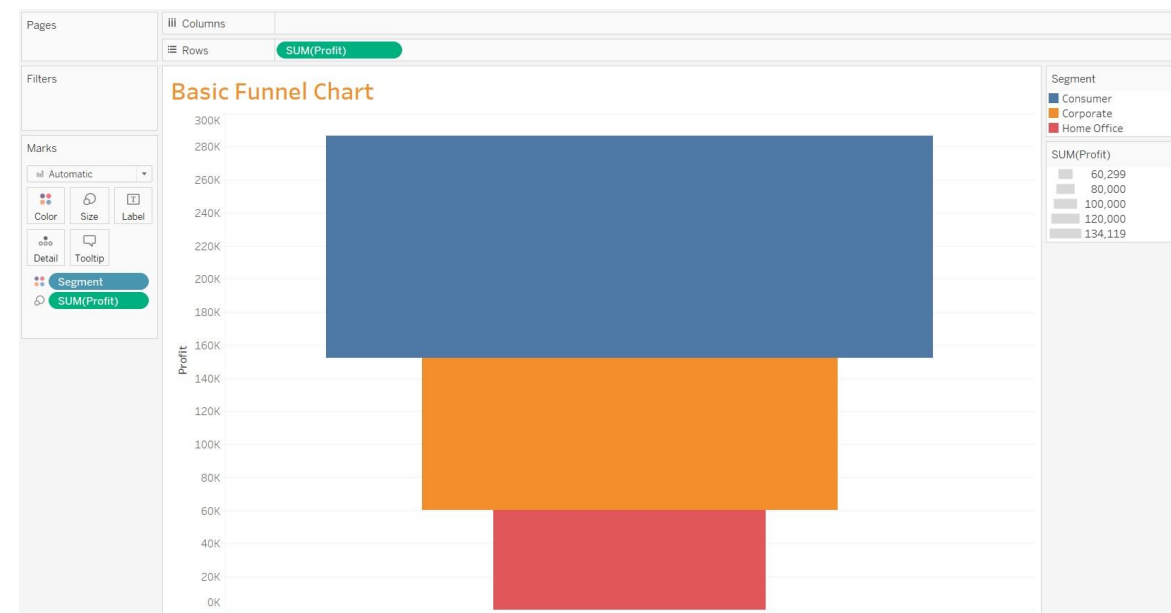
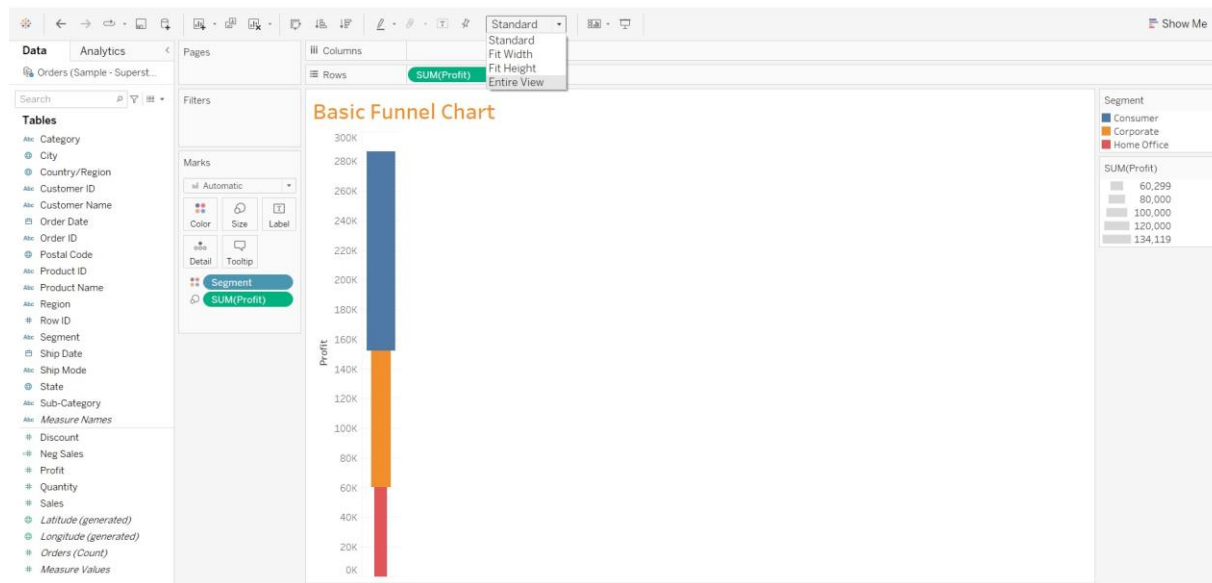
# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 3: Drag and drop **Profit** to the **Size** on **Marks** card



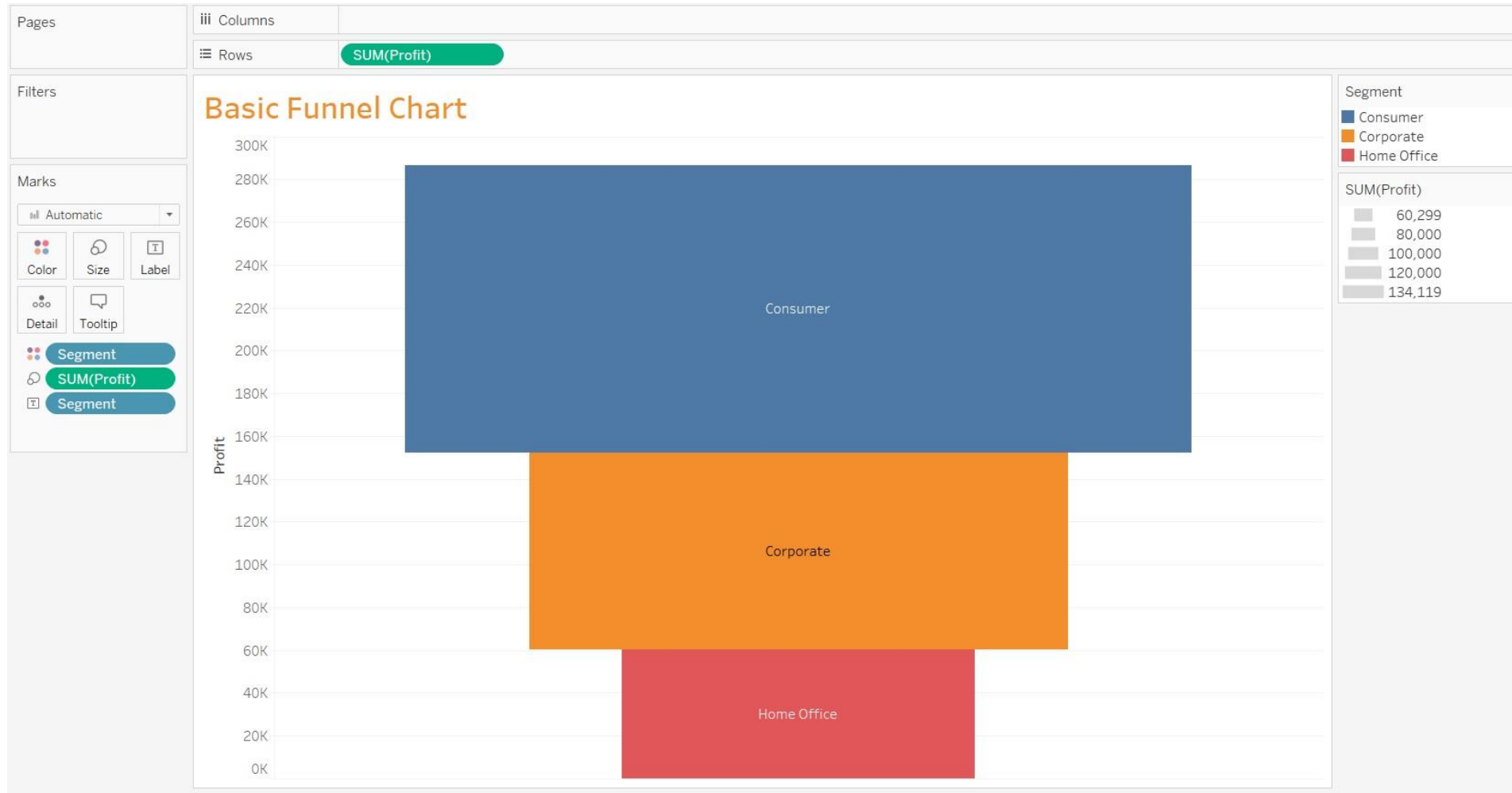
# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 4: Select **Entire View** from the drop-down



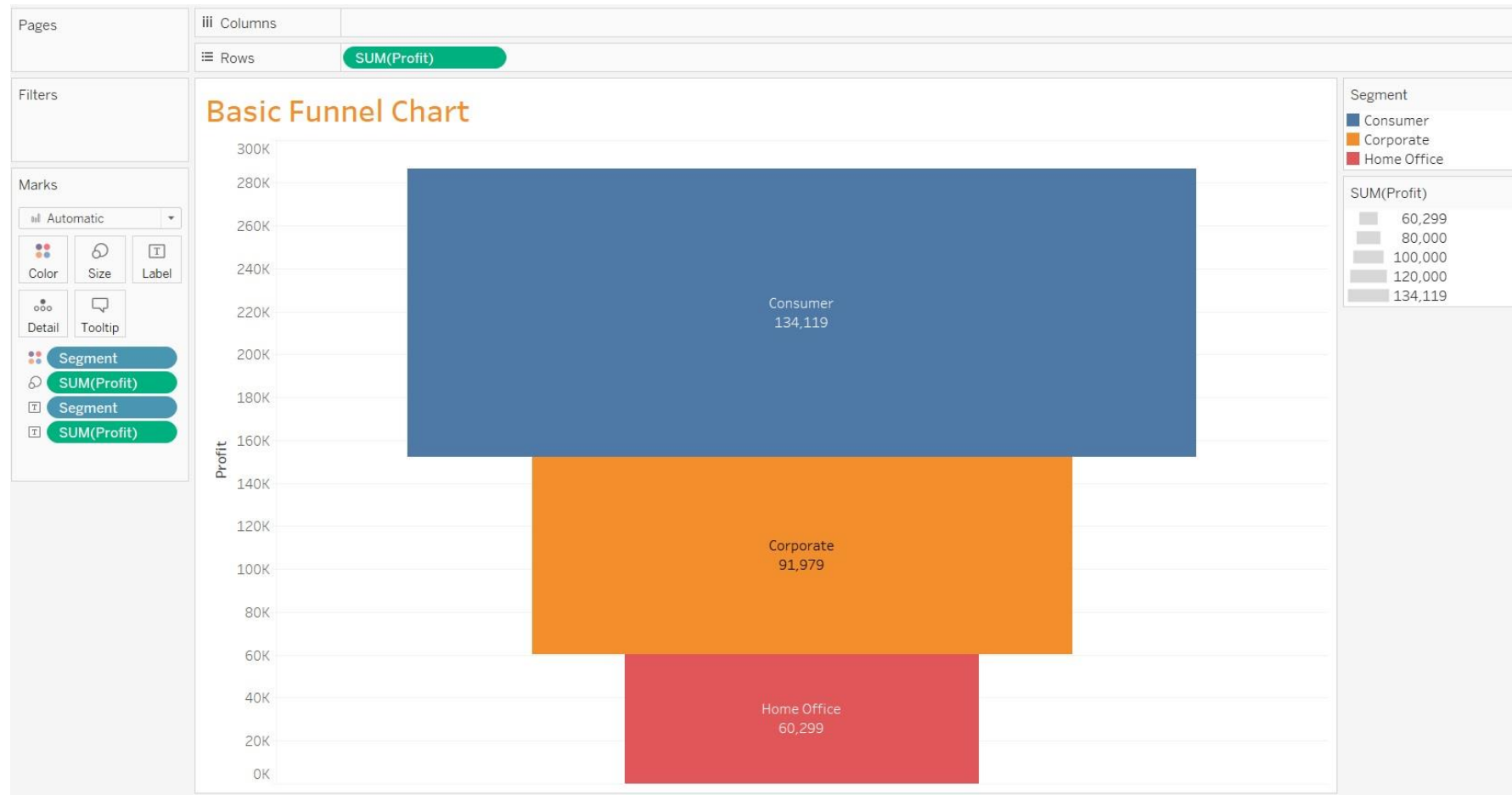
# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 5: Drag and drop **Segment** to the **Label** on **Marks** card



# STEPS TO CREATE A BASIC FUNNEL CHART

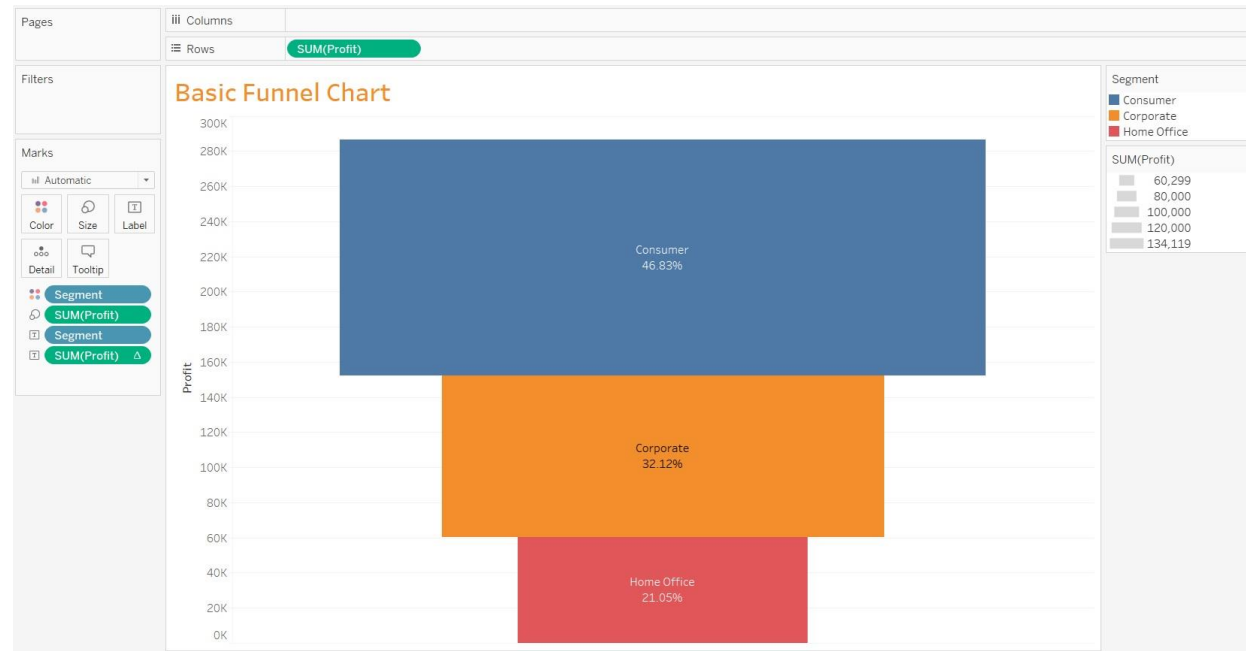
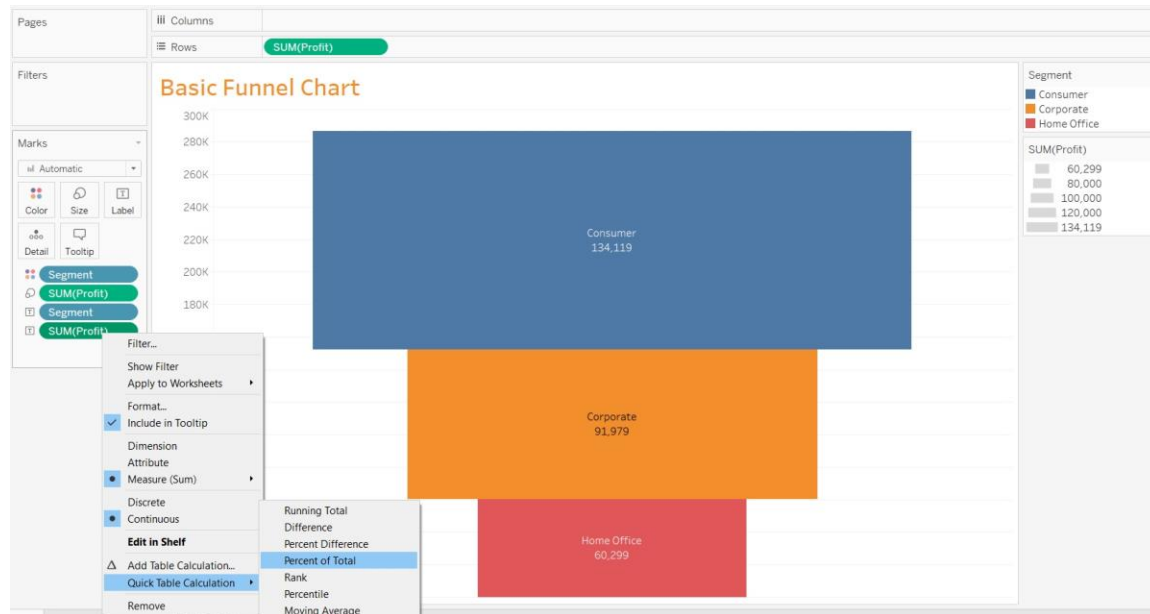
## STEP 6: Drag and drop **Profit** to the **Label** on **Marks** card





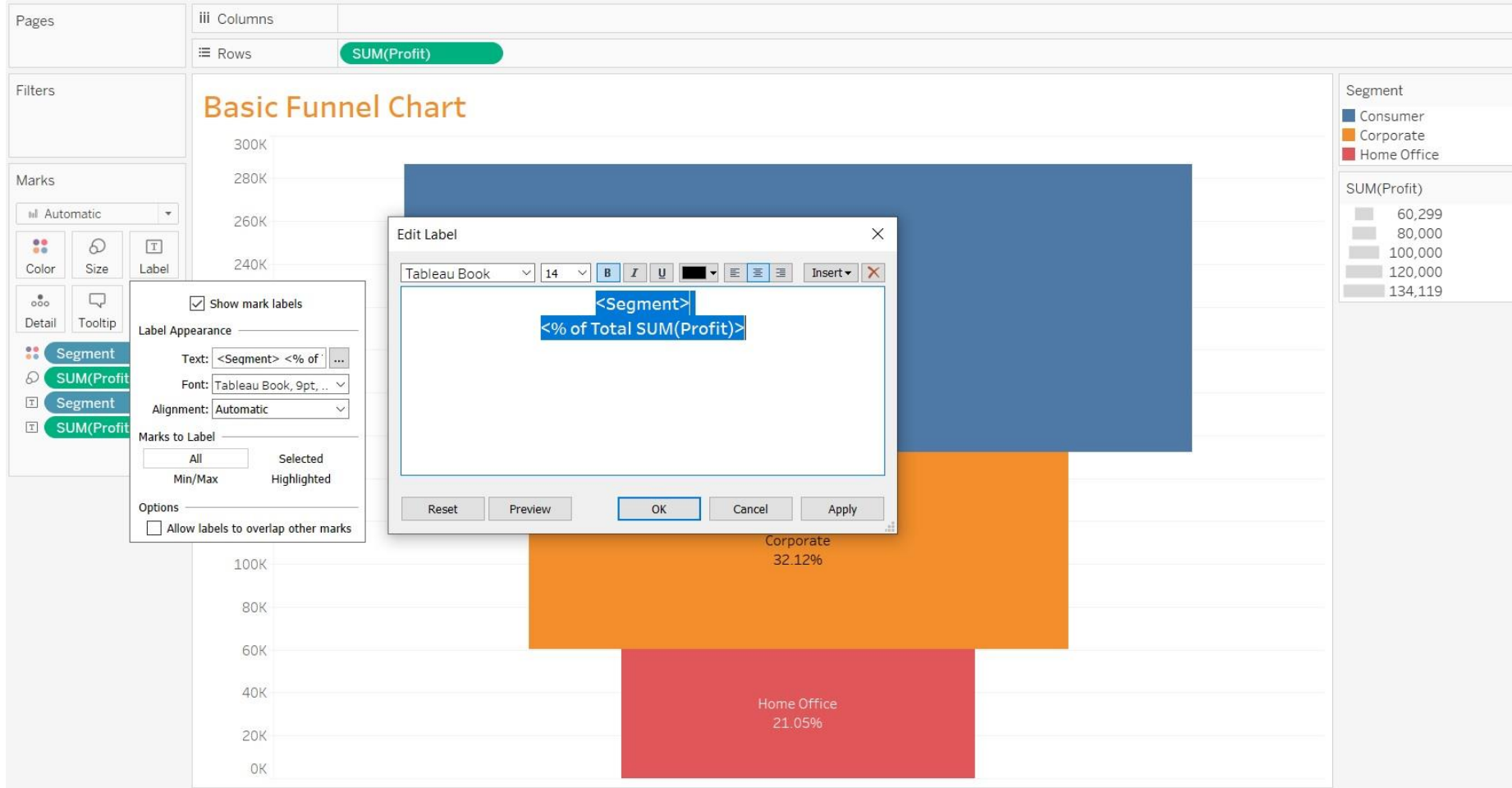
# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 7: Right-click **Profit**, Select **Quick Table Calculation > Percent of Total**



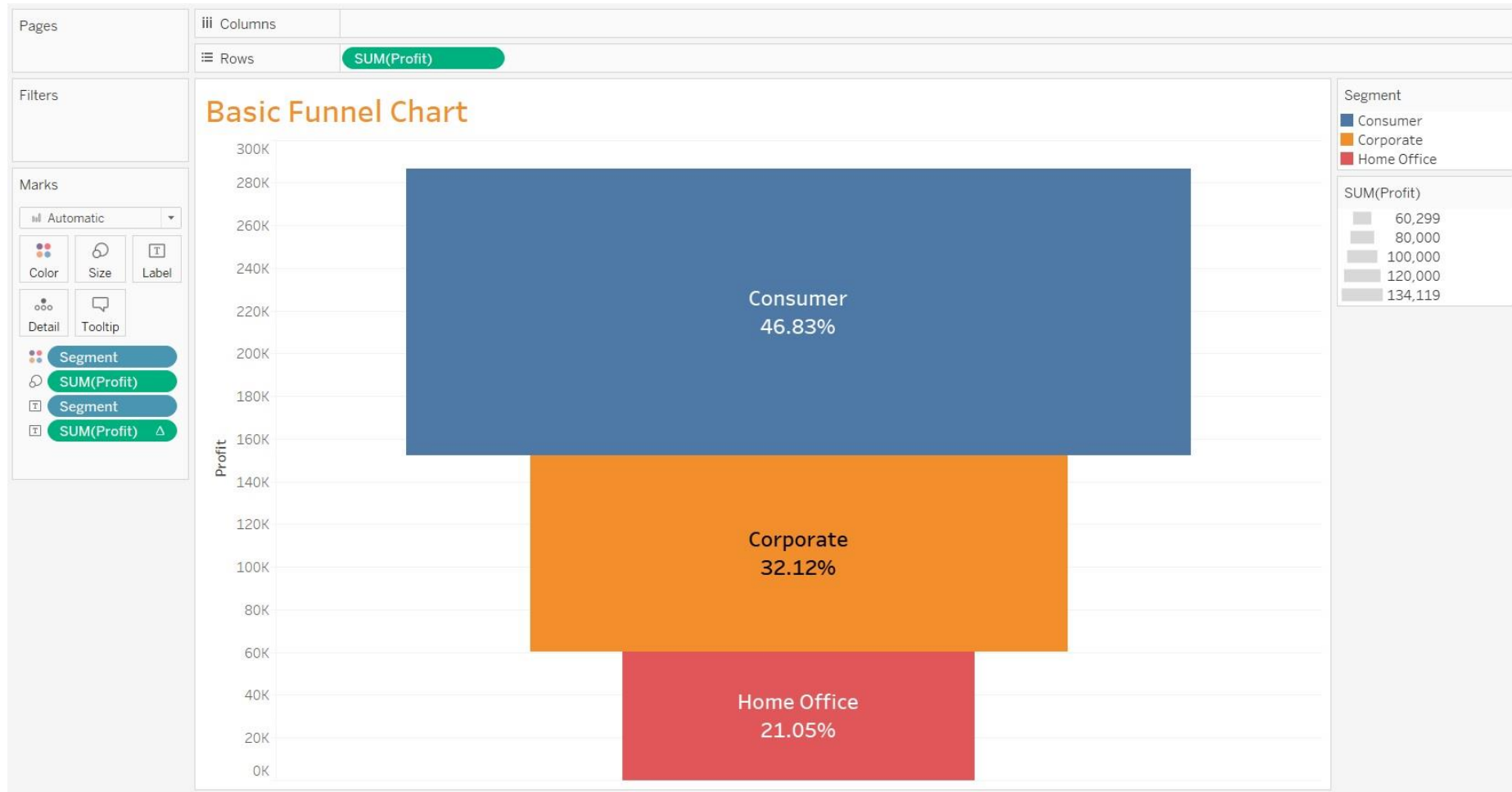
# STEPS TO CREATE A BASIC FUNNEL CHART

**STEP 8:** If required change the size of Label as shown



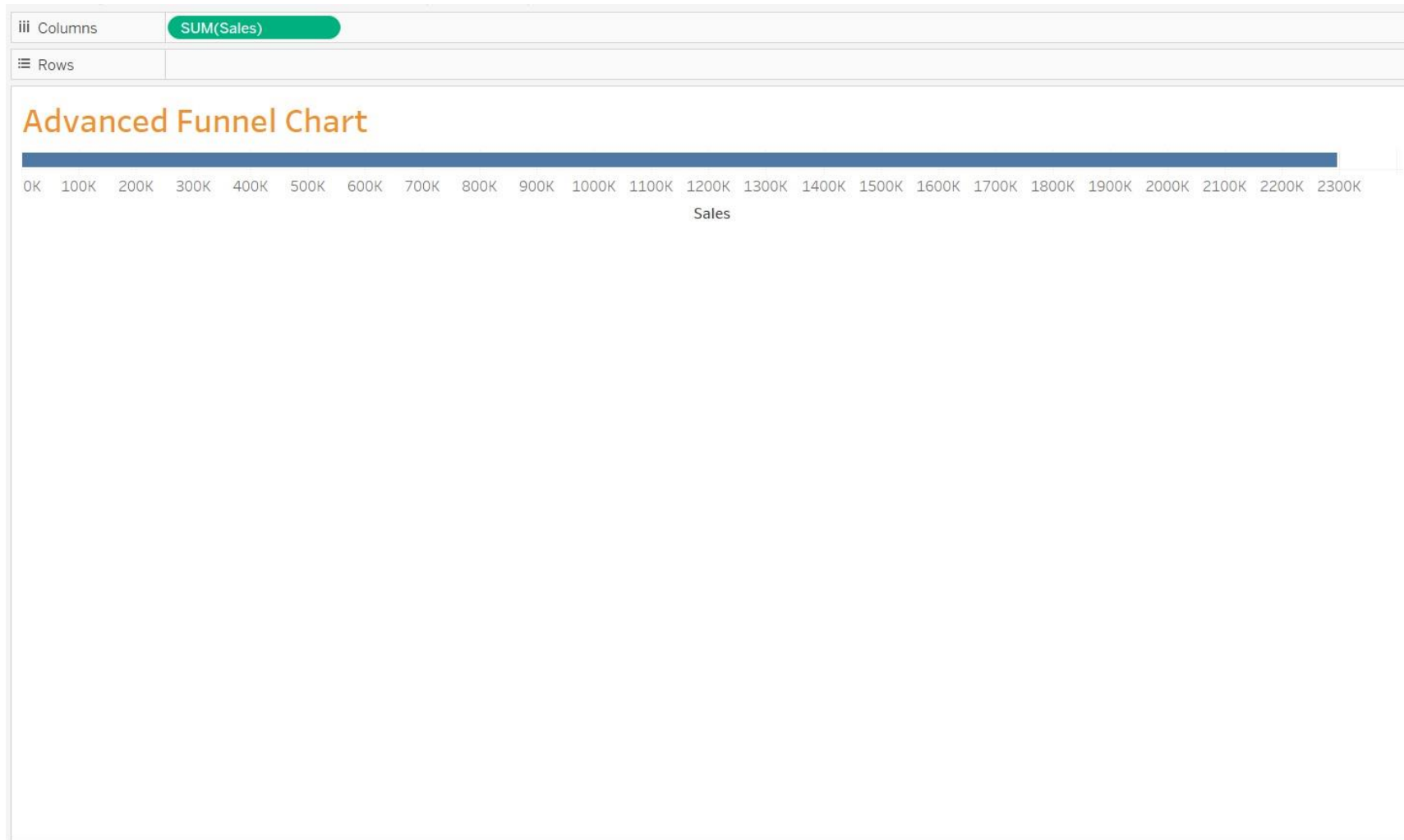
# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 9: This is the final Basic Funnel Chart



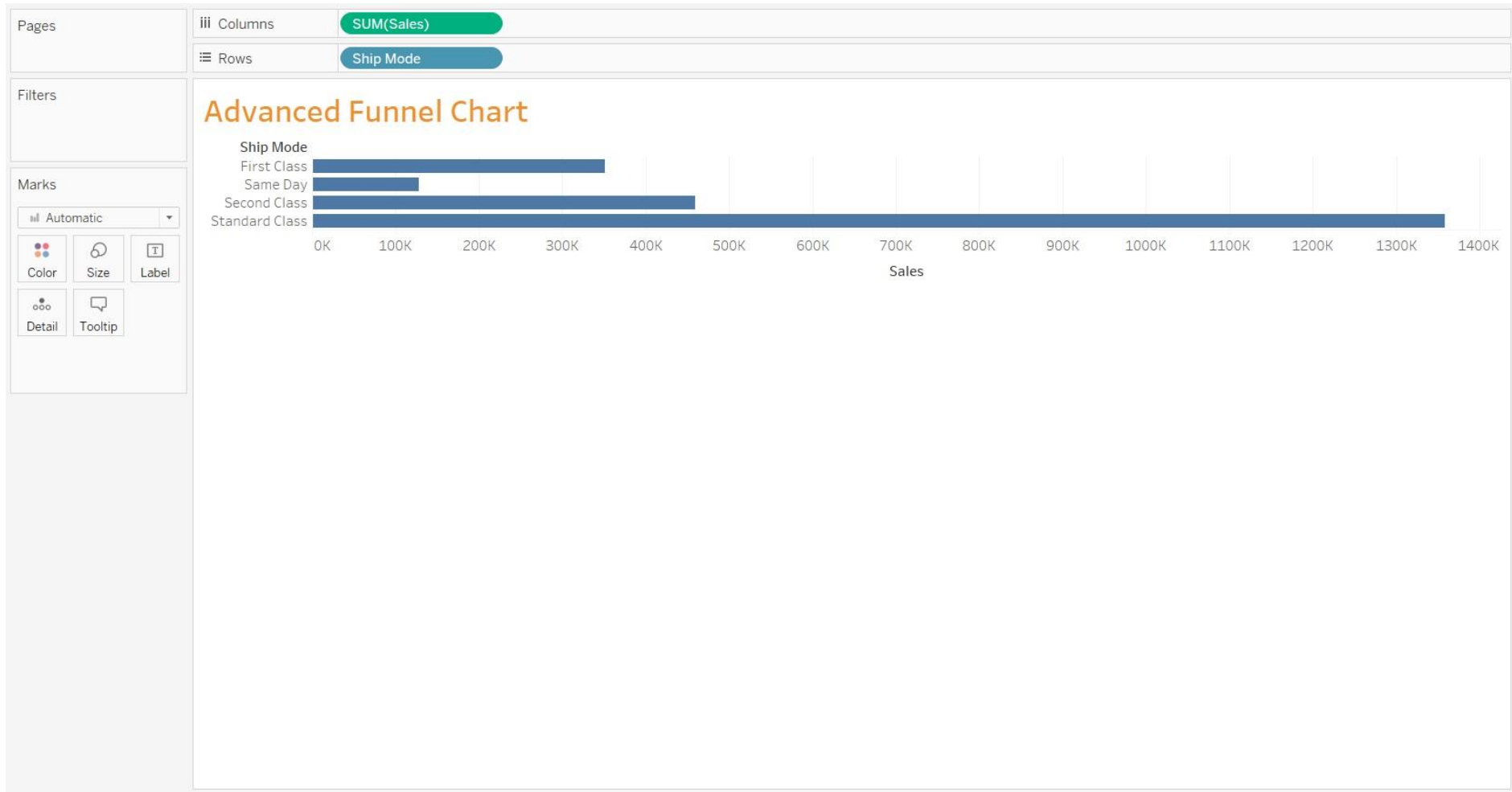
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 1: Drag and drop **Sales** to the **Columns** shelf



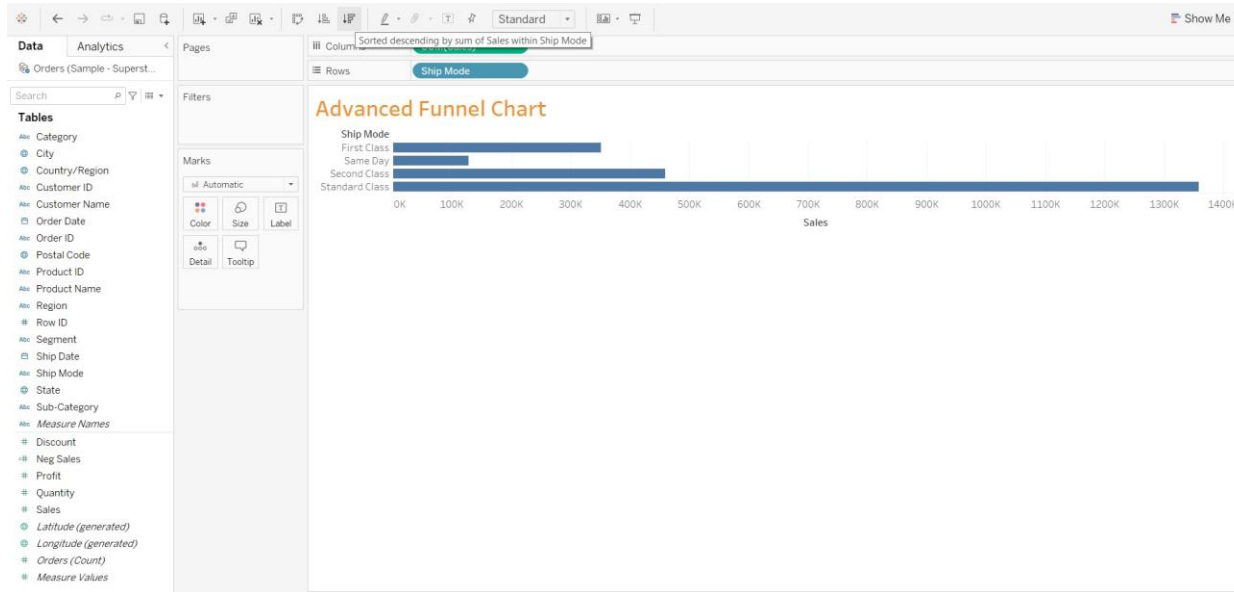
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 2: Drag and drop **Ship Mode** to the **Rows** shelf



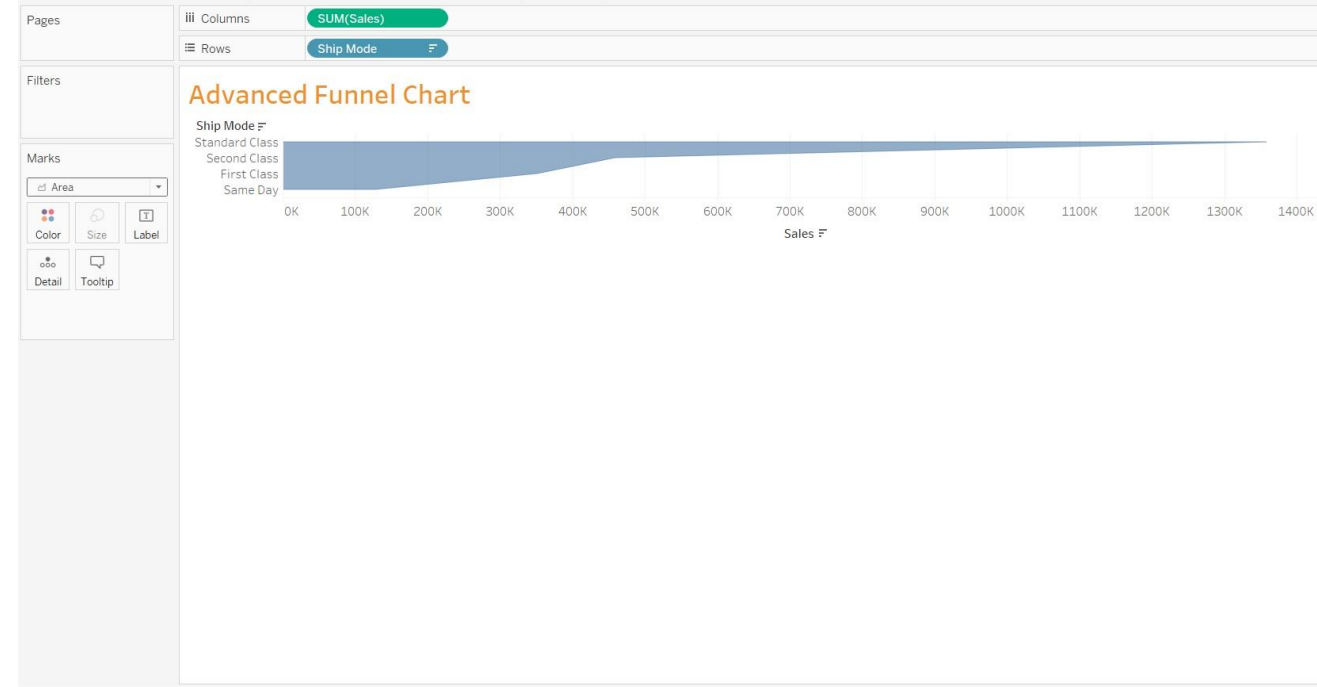
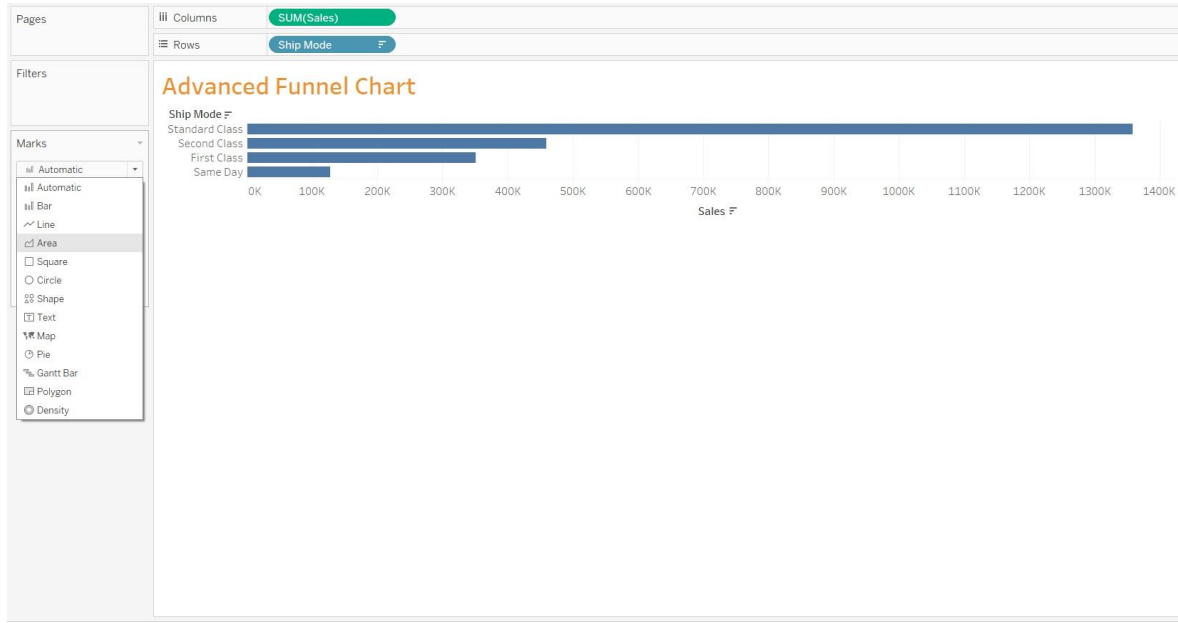
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 3: Click on Sorting icon as shown



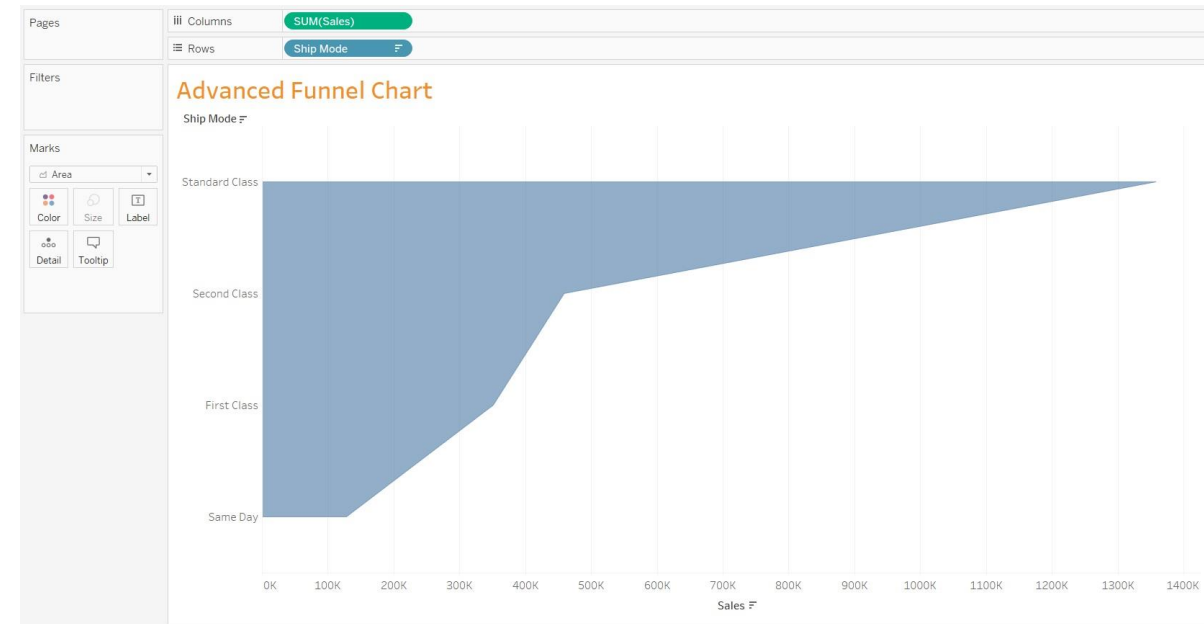
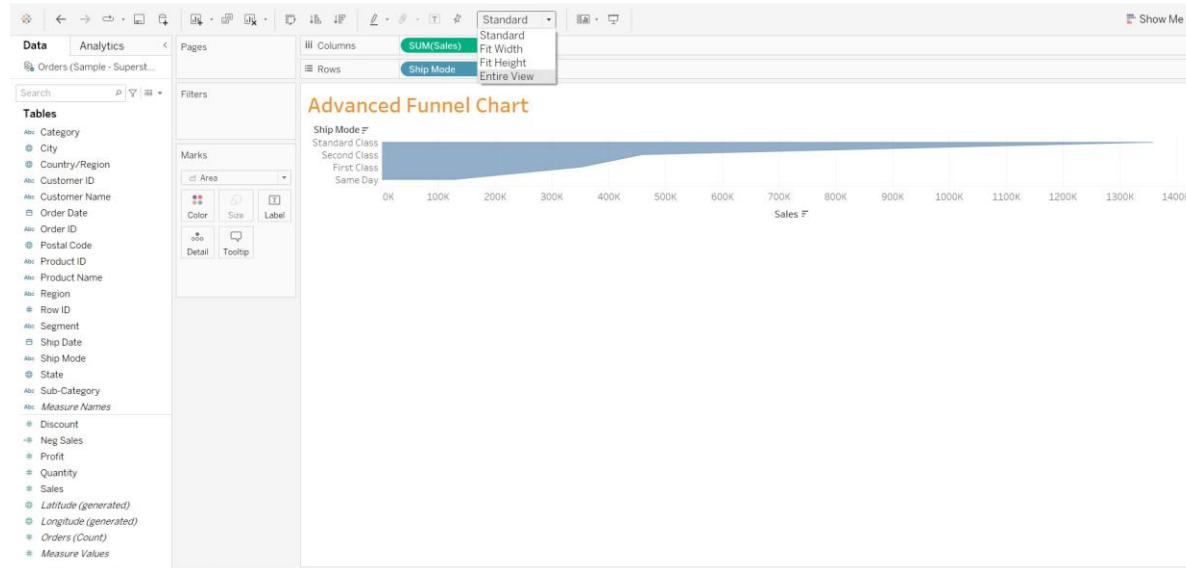
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 4: Select the **Area** option from **Marks** drop-down



# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 5: Select **Entire View** from the drop-down





# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 6: Create a **Calculated Field** for Negative Sales

Neg Sales

×

-[Sales]

▶

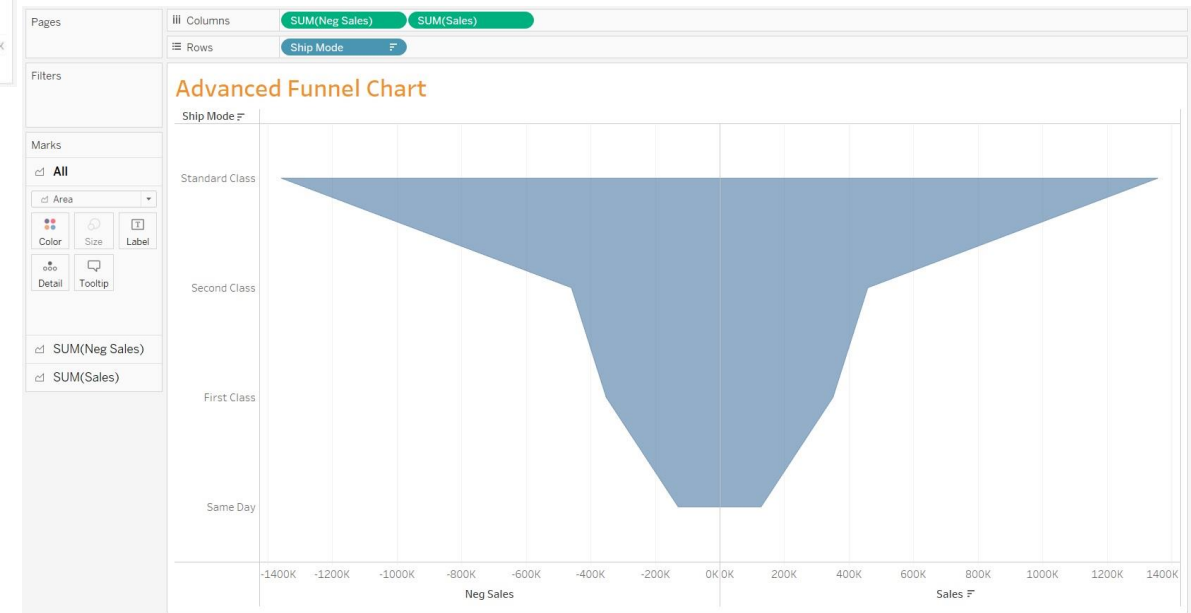
The calculation is valid.

Apply

OK

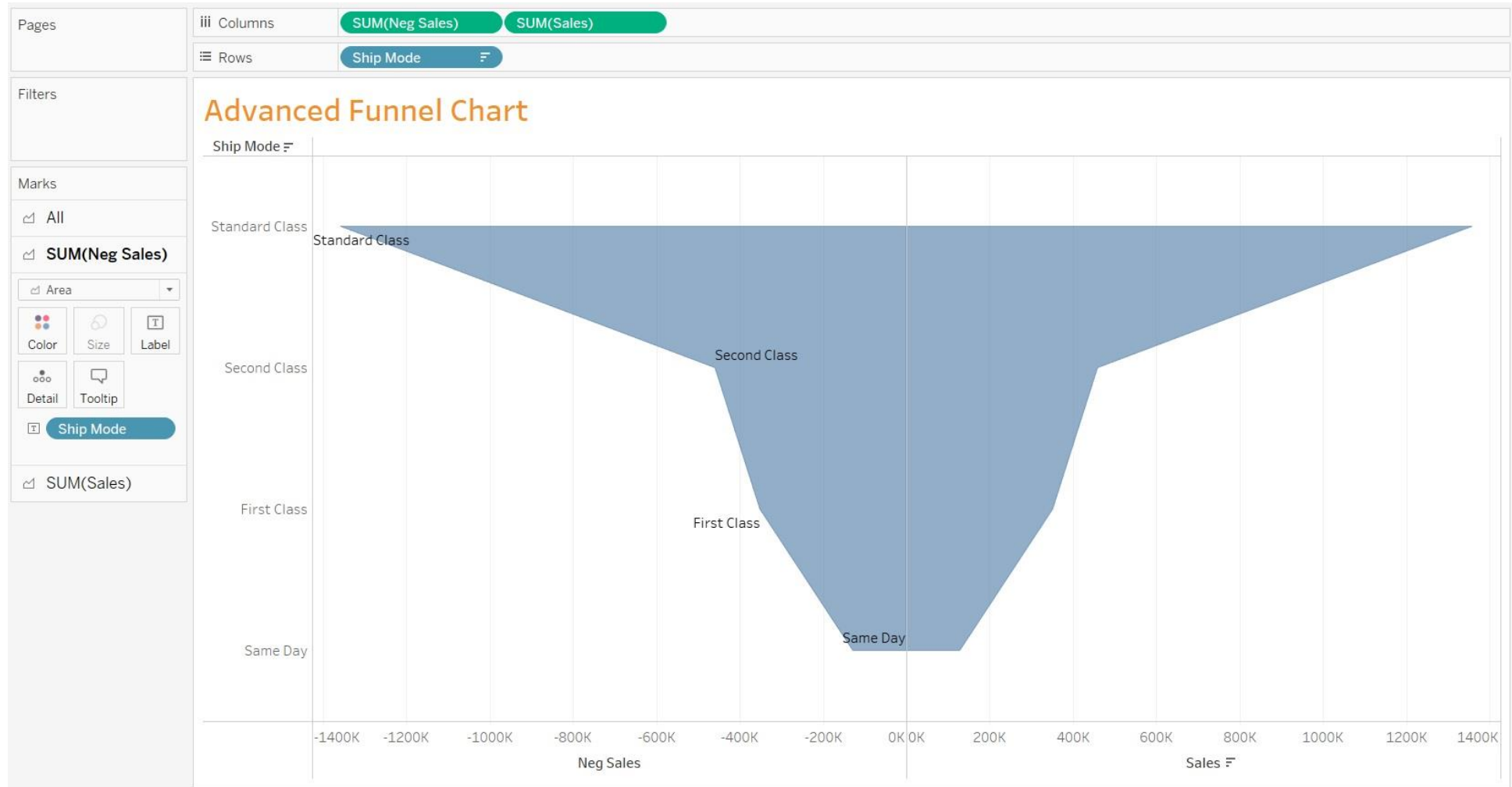
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 7: Drag and drop **Neg Sales** to the left of **Sales** pill in the **Columns** shelf



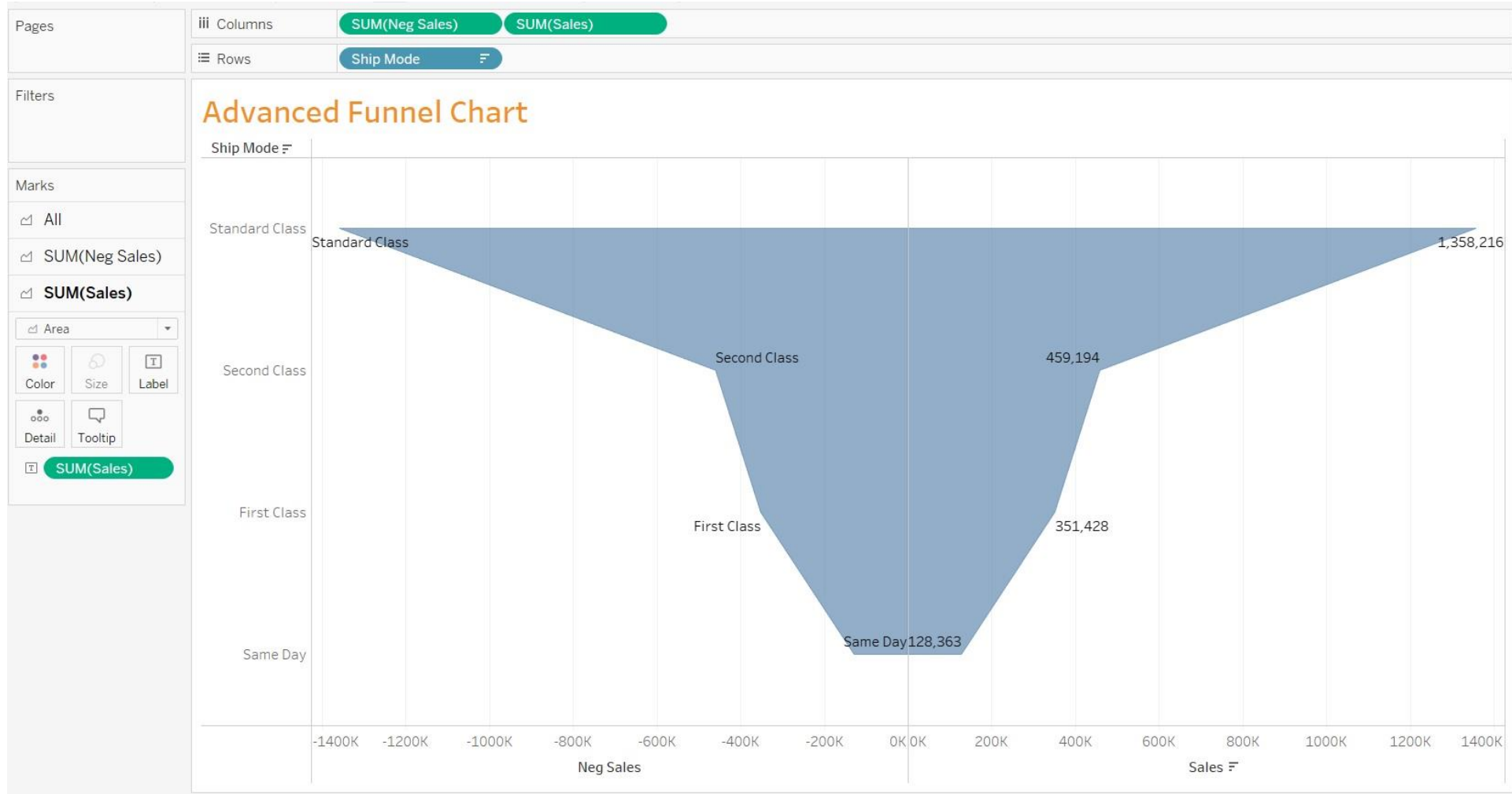
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

**STEP 8:** Drag and drop **Ship Mode** to the **Label** on **Marks** card of **SUM(Neg Sales)**



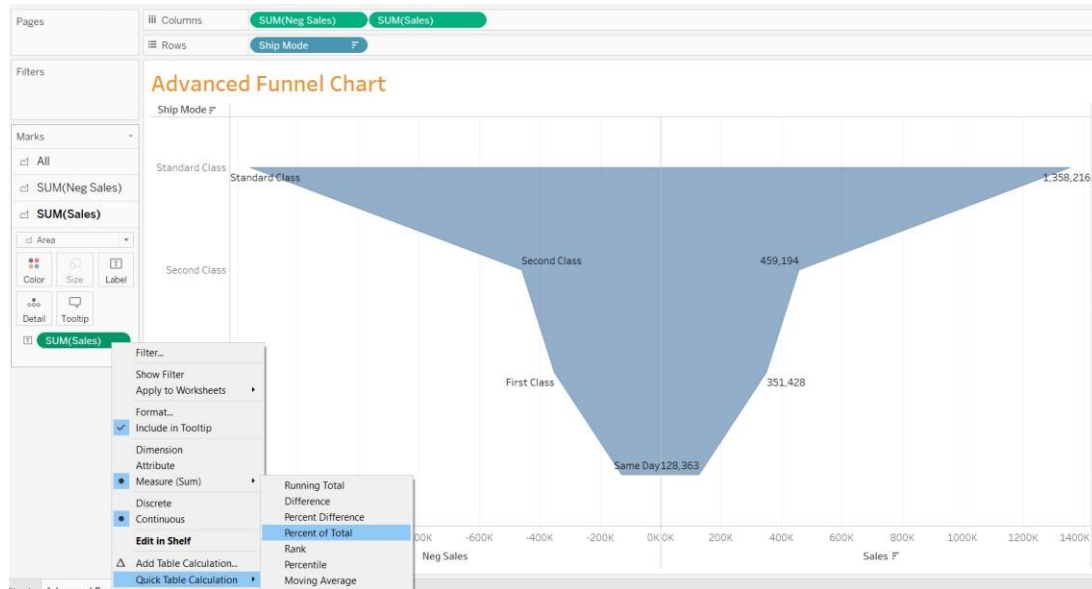
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 9: Drag and drop **Sales** to the **Label** on **Marks** card of **SUM(Sales)**



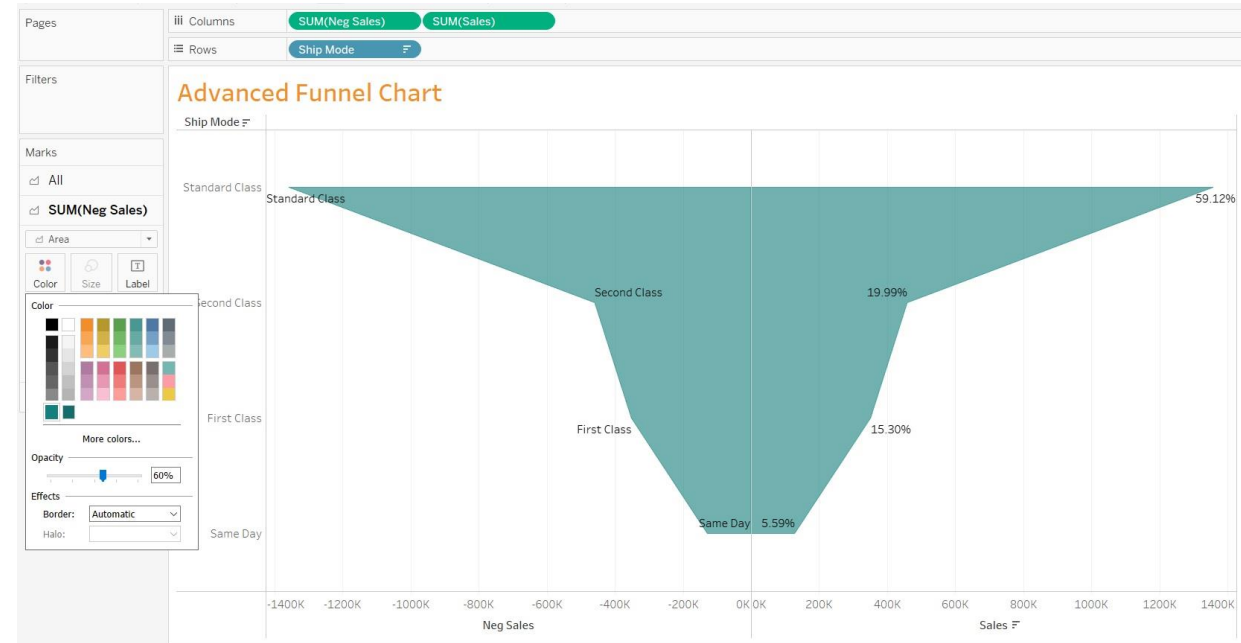
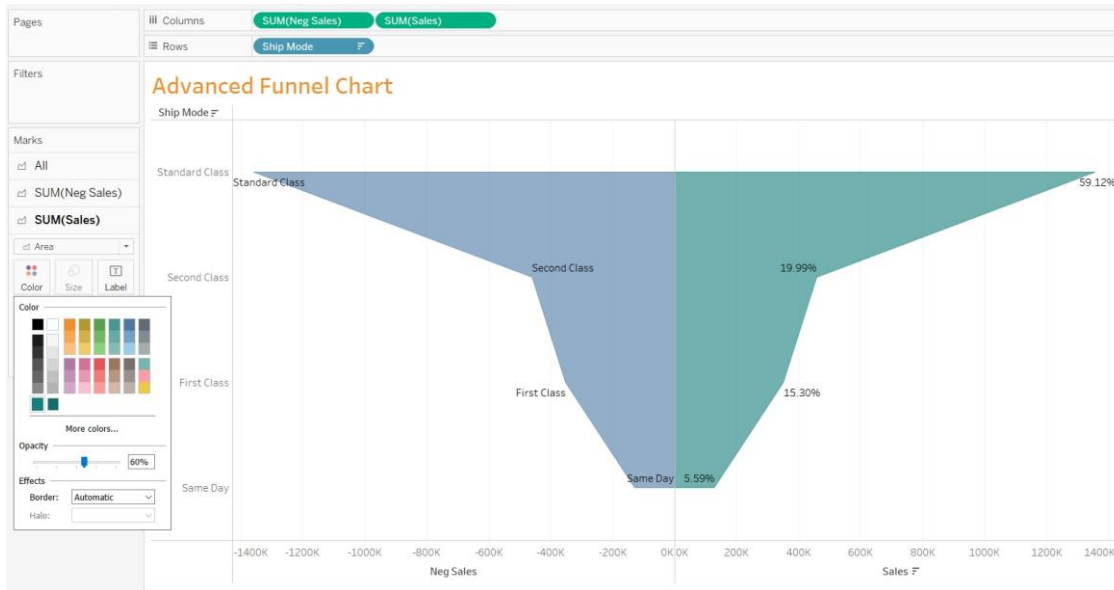
# STEPS TO CREATE THE ADVANCED FUNNEL CHART

## STEP 10: Right-click **Sales**, Select **Quick Table Calculation > Percent of Total**



# STEPS TO CREATE THE ADVANCED FUNNEL CHART

**STEP 11:** If required we can change the color of the chart for **SUM(Sales)** and **SUM(Neg Sales)**



# STEPS TO CREATE A BASIC FUNNEL CHART

## STEP 12: This is the final Advanced Funnel Chart

