Sales Performance Dashboard

Insights by Category, Region & Time

Load Dataset into Tableau

- Here I have taken a Superstore sample dataset in Microsoft excel in .csv format

- After that I have :

    1. Opened Tableau Public.

    2. Clicked on **"Connect" > "Microsoft Excel"** (or CSV).

    3. Selected the dataset file.

    4. Here Tableau will open the **Data Source** tab to make sure the data is loaded correctly.

Explore Data and Choose KPIs

- By observing the dataset I have chosen certain KPIs using some key business metrics like :
  - Total Sales
  - Total Profit
  - Here these two metrics tells about the total profits and sales happened in overall year and gives the values in different forms.
  - I have changed these KPIs by choosing the text in tableau to convert it in dollars or any other forms(like percentages, numbers, currency etc)

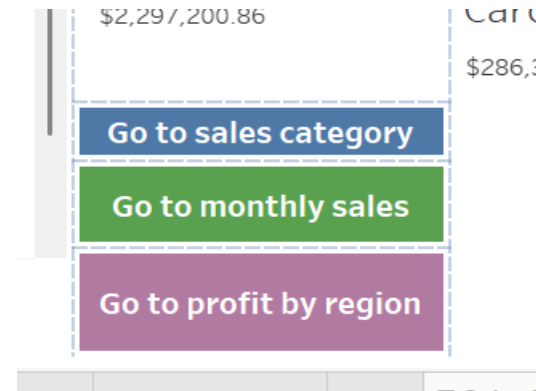# Create Basic Visuals for Analysis

- Here I have used certain visualizations to compare the sales, profits and categories for better analysis over the time like:

  - Sales Over Time (Line Chart)

  - Profit by Region (Bar Chart)

  - Sales by Category (Pie Chart)

  - And also dragged region , category and order date to filters where they are seen to the right side of the dashboard

Create Dashboard

- In tableau, click on the "Dashboard" > "New Dashboard".

- Then a new dashboard is opened in tableau.

- Drag all the worksheets into the dashboard and align them in ordered form.

- After assigning the worksheets we can easily use containers to assemble them in neat way where it can make the users understand the dashboards easily.

- I have added the title "Sales Performance Dashboard " to make others to understand what type of dashboard it is.

- Applied consistent color themes for the charts where we can glance the importance of those charts.

Add Navigation

- A **navigation menu** lets users easily move between different pages of the dashboard like it can be used to find certain worksheets that the user is looking for by assigning certain buttons that navigate the worksheets from the dashboard.

- Here I have created navigation button in dashboard where it can locate the worksheets by clicking on those buttons.

| Dashboard | Layout | < |

Default
Phone

Device Preview

Size

min 420x560 - max 1300x8...

Sheets

- Total Sales(KPI ...
- Total Profit(KPI ...
- Monthly Sales
- Profit By Region
- Sales By ...
- Filters

Objects

- Blank
- Workflow
- Web Page
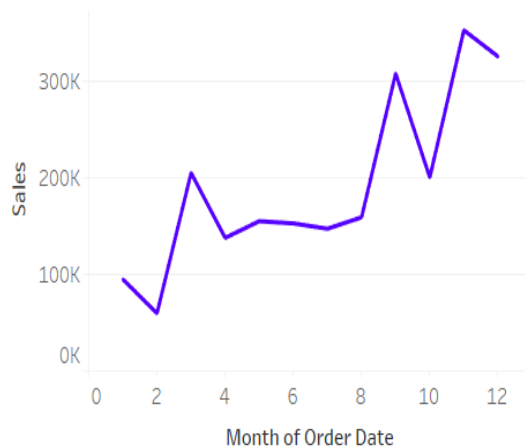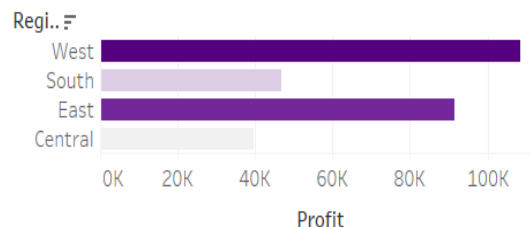- Navigation
- Download
- Add Filters
- Einstein Discovery

| Tiled | Floating |

☑ Show dashboard title

Sales Performance Dashboard: Insights by Category, Region & Time

Monthly Sales

Sales — 300K, 200K, 100K, 0K
Month of Order Date — 0 2 4 6 8 10 12

Profit By Region

Regi..

West
South
East
Central

0K 20K 40K 60K 80K 100K
Profit

Category
- ■ Furniture
- ■ Office Supplies
- ■ Technology

Profit
39,706 _____ 108,418

This dashboard shows important business metrics like **Total Sales**, **Profit**, and how they change over time.
You can use the filters to look at data by **Region**, **Category**, and **Order Date**.
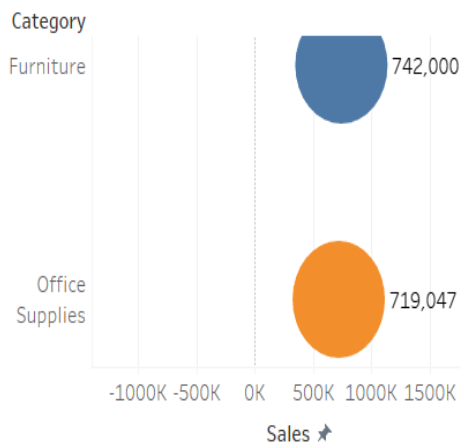It helps us to:
See which regions or categories are performing well
Track sales and profit trends
Make better business decisions based on data

Sales By Category

Category

Furniture — 742,000

Office Supplies — 719,047

-1000K -500K 0K 500K 1000K 1500K
Sales ★

Total Sales(KPI Card)

$2,297,200.86

Total Profit(KPI Card)

$286,397.02

Filters

Go to sales category

Go to monthly sales

Go to profit by region

Category
- ☑ (All)
- ☑ Furniture
- ☑ Office Supplies
- ☑ Technology

Month of Order Date
- ☐ (All)
- ☐ January
- ☑ February
- ☑ March

Region
- ☐ (All)
- ☑ Central
- ☐ East
- ☑ South