Tab 1

Assignment -1

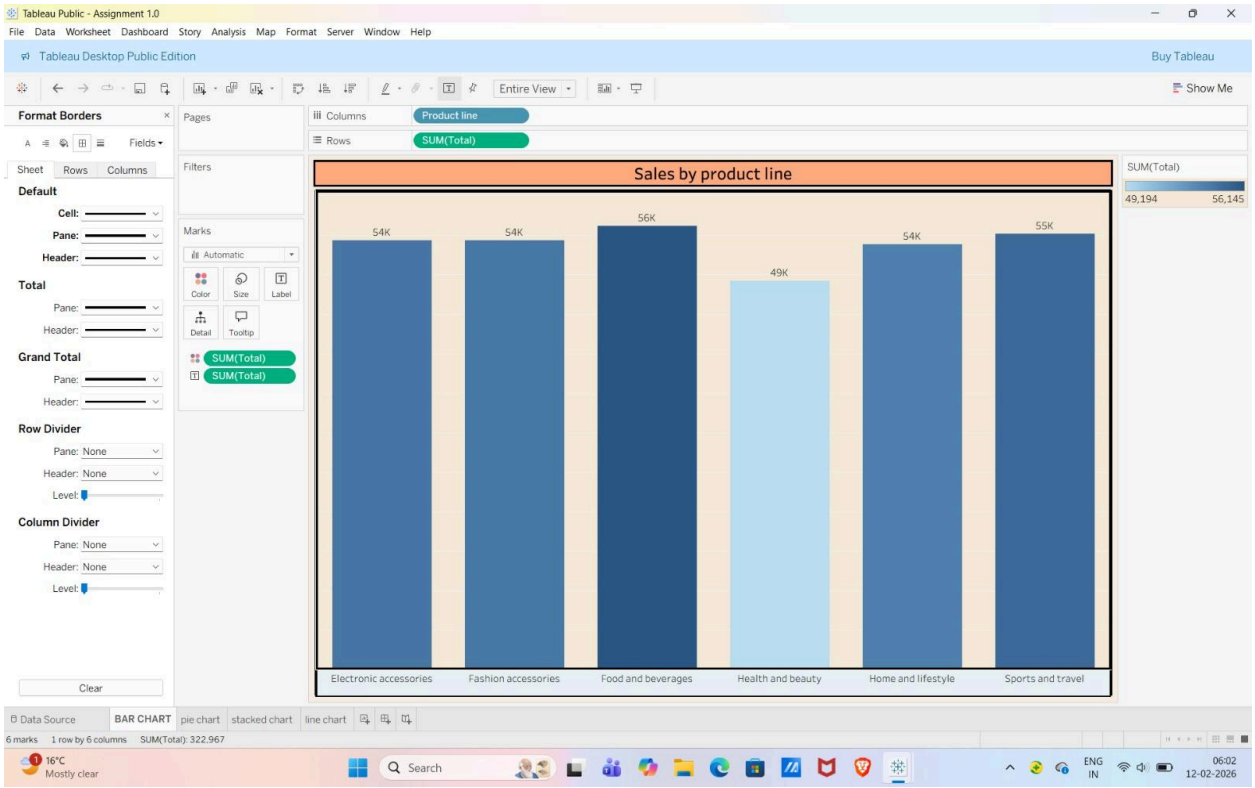
1.sales by product line (Bar chart):

Purpose:

A bar chart is used to compare values between different categories. It helps to easily identify which category is highest, lowest, or equal by comparing the lengths of the bars.

Step by steps:

1.Open Tableau and connect to the required dataset (Excel/CSV file).
2.After loading the data, go to Sheet 1.
3.Drag the Product Line (Dimension) field to the Columns shelf.
4.Drag the Total / Sales (Measure) field to the Rows shelf.
5.Tableau automatically creates a Bar Chart. If not, select Bar from the Show Me option.
8.Ensure the aggregation is SUM(Total).
7.Click on the Marks Card → Label → Show Mark Labels to display values on bars.
8.Format the numbers by right-clicking SUM(Total) → Format → Select Thousands (K).
9.Change the Color and Size of bars if required from the Marks card.
10.Edit the title and give the name “Sales by Product Line” and adjust the view to EntireView.



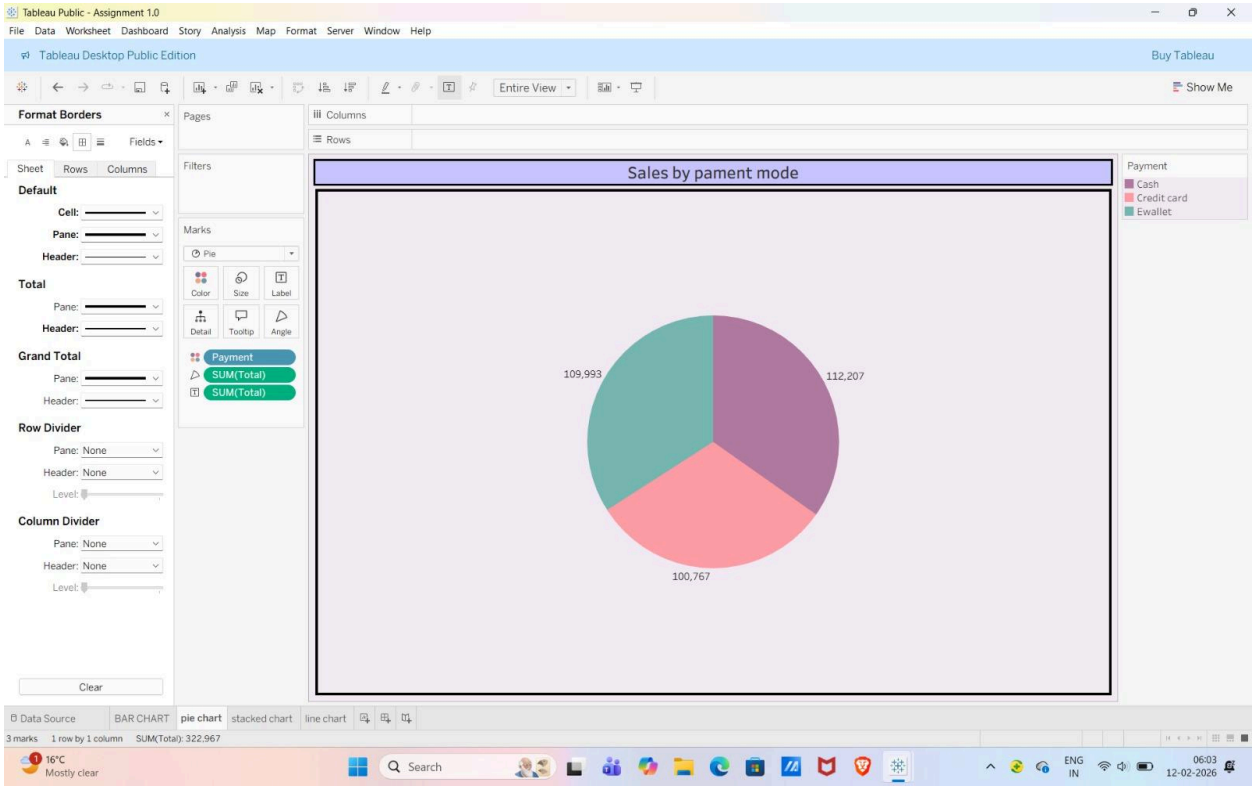
2.sales by payment mode (pie chart):

Purpose:

A pie chart is used to show the proportion or percentage of each category out of a whole. It helps to understand how different parts contribute to the total.

Step by steps:

1.Open Tableau Desktop / Tableau Public.
2.Connect to the dataset (Excel, CSV, etc.).
3.Go to a New Worksheet.
4.Drag the dimension (e.g., Payment Mode) to the *Marks* card.
5.Change the Marks type to “Pie” from the drop-down menu.
6.Drag the measure (e.g., Sales/Total Amount) to the *Angle* shelf.
7.Drag the same measure to Label to show values on the pie chart.
8 Drag the dimension to Color to differentiate slices.
9.Adjust Size if needed.
10.Add a Title (e.g., “Sales by Payment Mode”) and format the chart.



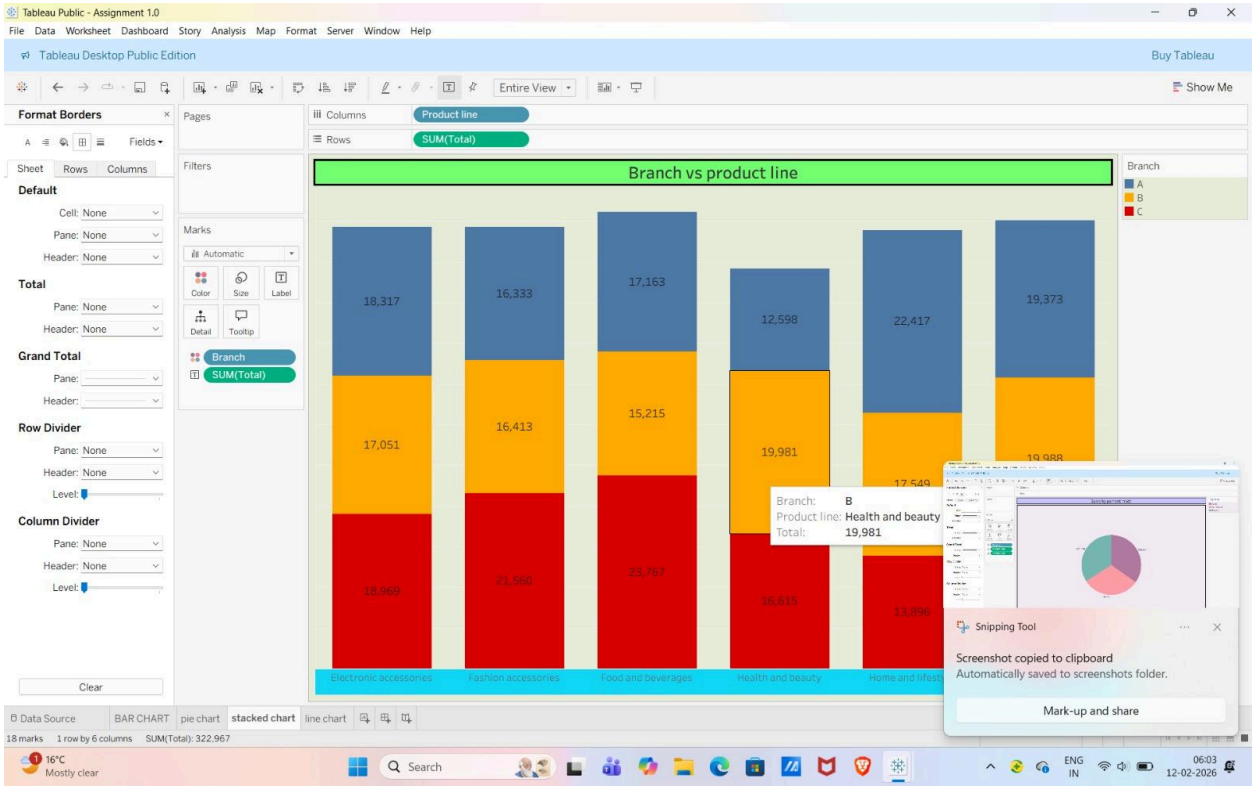
3. Branch vs Product Line(Stacked Bar Chart)

Purpose:

A stacked chart is used to compare totals across categories while also showing how each sub-category contributes to the overall total.

Step by steps

1.Open Tableau and connect to your dataset.
2.Go to a new worksheet.
3 Drag the main category (e.g., Product Line) to the Columns shelf.
4.Drag the measure (e.g., Sales/Total) to the Rows shelf.
5.Tableau will create a bar chart automatically.
6.Drag the sub-category (e.g., Branch/Region) to the Color option in the Marks card.
7.The bars will now appear stacked with different colors.
8.Make sure the Mark type is set to Bar.
9.Click on Analysis → Stack Marks → On (if not already enabled).
10.Drag the measure to Label to show values on the chart.
11.Edit the chart title and format colors if needed.
12.Save the worksheet.

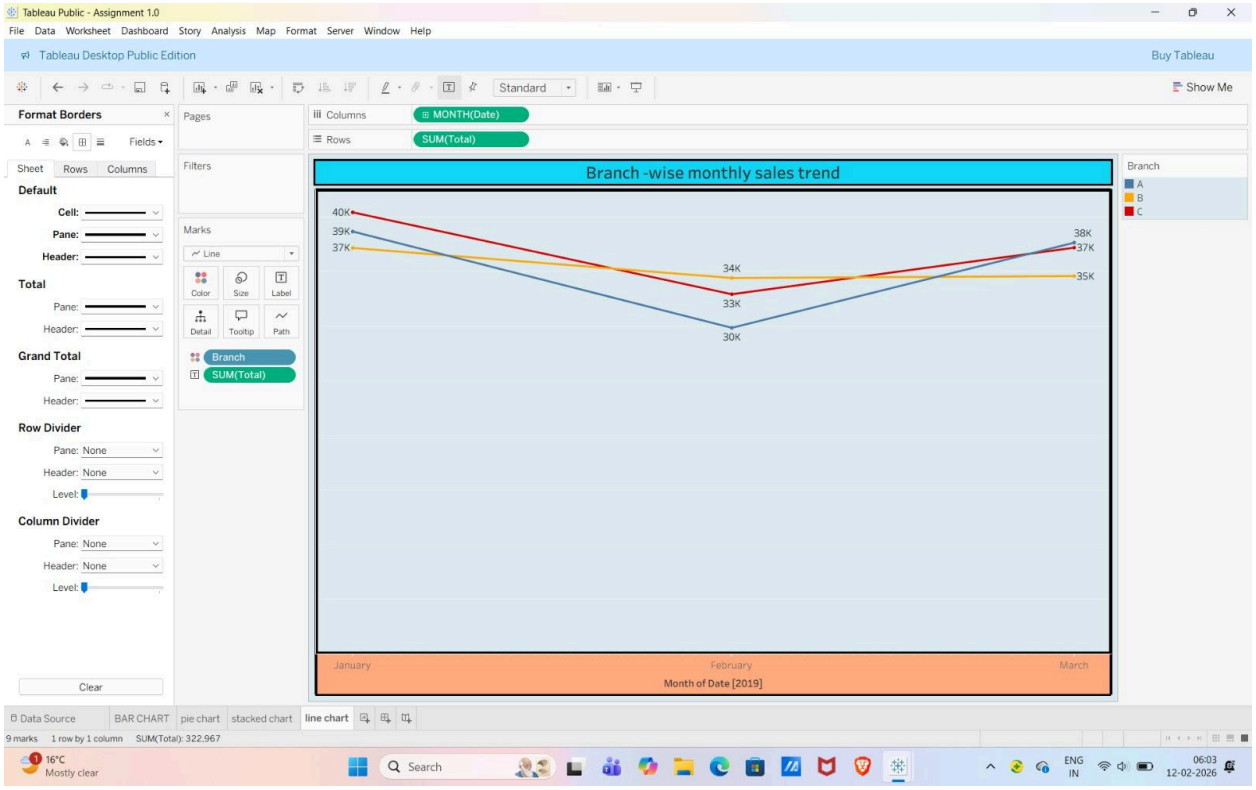


4 Sales Trend Over Time(Line Chart):

Purpose:
A line chart is used to show trends or changes over time. It helps identify increases, decreases, or patterns in data.

Step by steps:

1Open Tableau Desktop / Tableau Public.
2.Connect to your dataset (Excel, CSV, etc.).
3.Go to a New Worksheet.
4.Drag the Date field to the Columns shelf.
5.Set the Date to Month (Continuous or Discrete as required).
6.Drag the Measure (e.g., Sales / Total) to the Rows shelf.
7.From the Marks card, select Line as the chart type.
8.Drag the Category field (e.g., Branch) to Color to create multiple lines.
9.Drag the Measure to Label if you want to display values on the line.
10.Adjust the Size and Color of the line if needed.
11.Add a Title (e.g., “Branch-wise Monthly Sales Trend”).
12.Format the chart (axis, gridlines, borders) for better presentation.



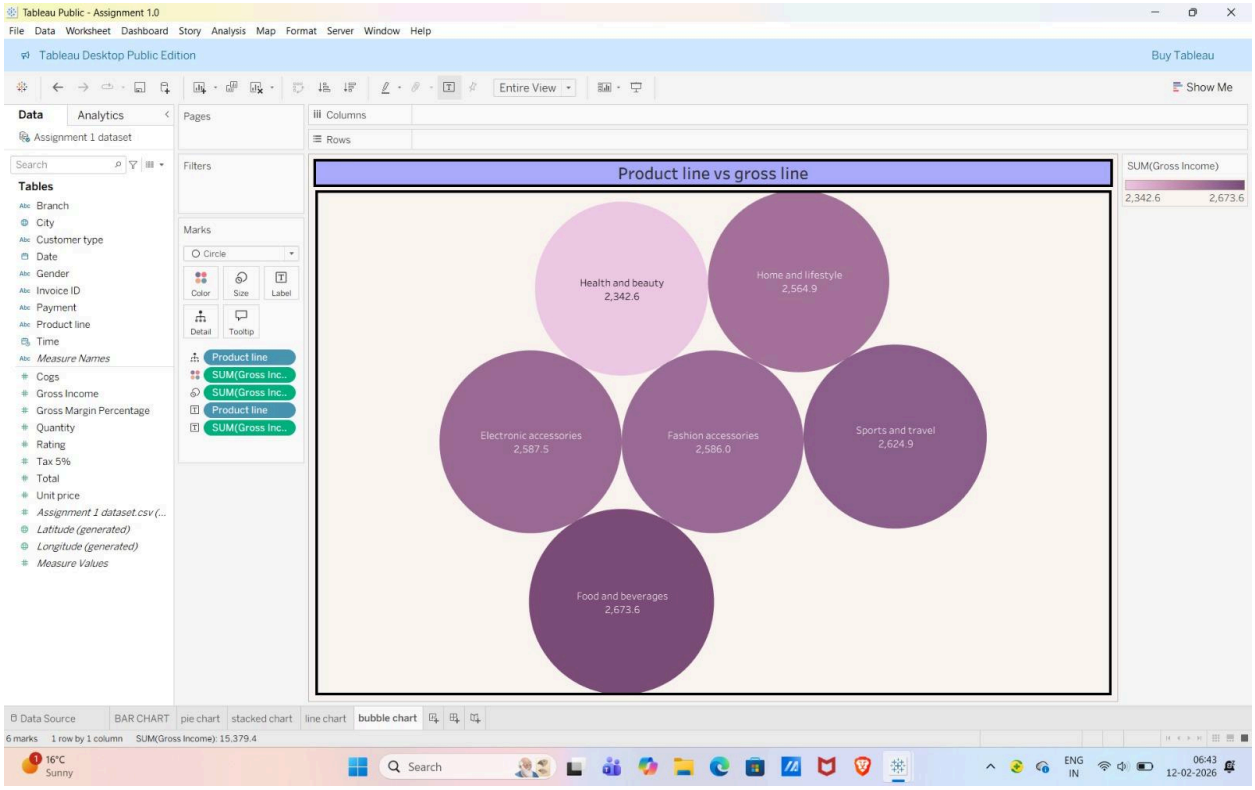
5.Product Line vs Gross Income(Bubble Chart)

Purpose:

A bubble chart is used to compare three variables at once using position (X and Y axis) and bubble size. It helps show relationships and data distribution clearly.

Step by steps:

1.Open Tableau Desktop / Tableau Public.
2.Connect to your dataset (Excel, CSV file, etc.).
3.Go to a New Worksheet.
4..Drag the Dimension (e.g., Product Line) to the Marks card.
5.Change the Marks type to “Circle”.
6.Drag the Measure (e.g., Gross Income / Sales) to the Size shelf.
7.Drag the same measure to Color to show variation in values.
8.Drag the Dimension (Product Line) to Label to display names on bubbles.
9.Drag the Measure to Label if you want to show values inside bubbles.
10.Adjust the Size slider to make bubbles clear and visible.
11.Format the colors, borders, and background if needed.
12.Add a Title (e.g., “Product Line vs Gross Income”).



Assignment-2

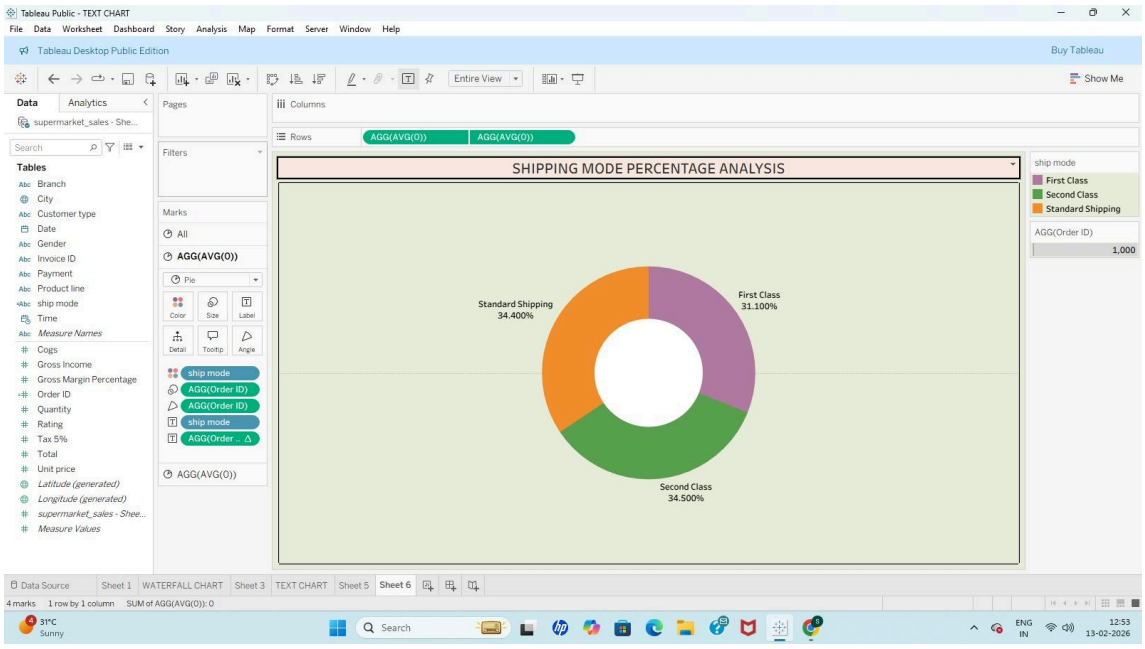
1.shopping mode percentage analysis (Donut Chart)

Purpose:

A donut chart is used to show the proportion or percentage of categories in a dataset, similar to a pie chart, but with a blank center for better readability or to display additional information like total value.

Step by steps:

1.Open Tableau Desktop / Tableau Public.
2.Connect to your dataset.
3.Open a New Worksheet.
4.Drag the Dimension (e.g., Ship Mode) to the Marks card.
5.Change the Marks type to Pie.
6.Drag the Measure (e.g., Order ID / Sales) to the Angle shelf.
7.Drag the same measure to Label to show values or percentage.
8.Drag the dimension to Color to differentiate slices.
9.To create the donut hole, drag a field (or create a calculated field like 0) to Rows twice and select Dual Axis.
10.On the second Marks card, change mark type to Circle, reduce the size, and color it white to form the centerhole.



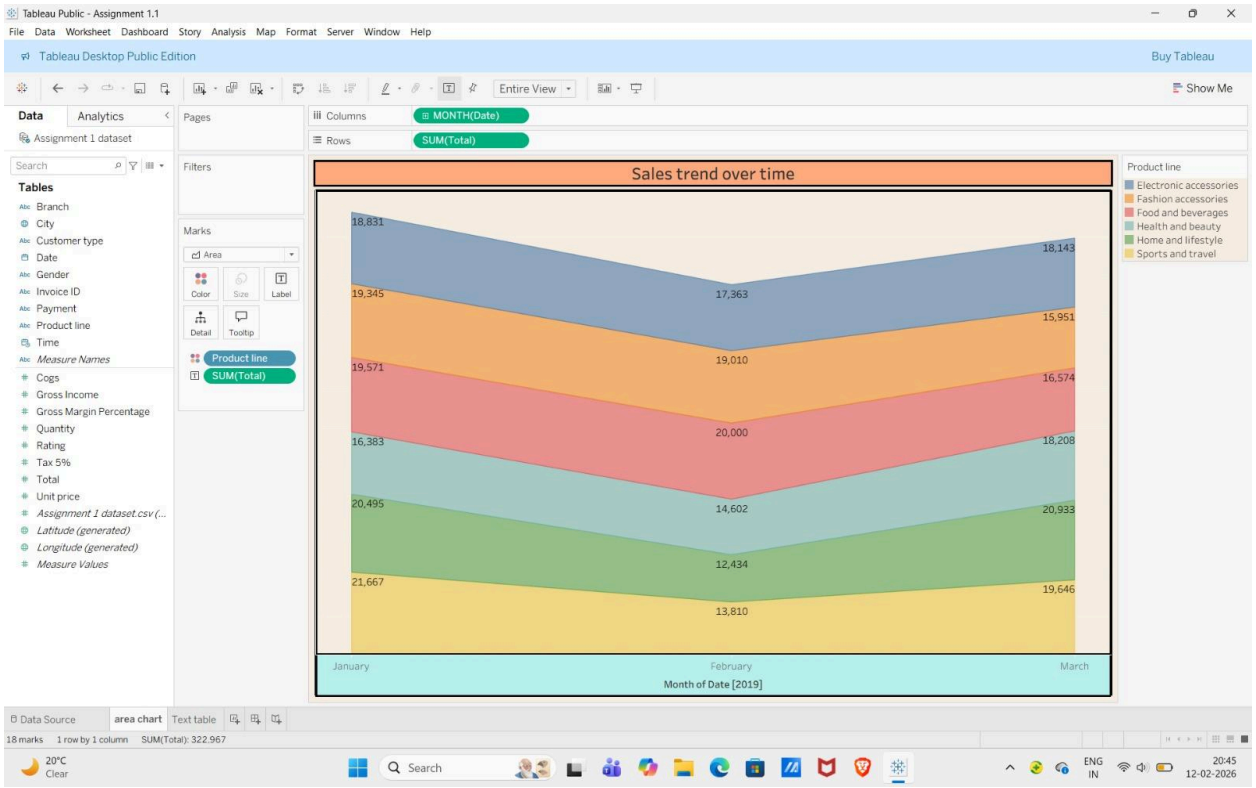
2. Sales Trend over Time(Area Chart)

Purpose:

An area chart is used to show trends over time while also highlighting the magnitude of values. It helps compare totals and see how different categories contribute over a period.

Step by steps :

1.Open Tableau Desktop / Public.
2.Connect to your dataset.
3.Open a New Worksheet.
4 Drag the Date field to the Columns shelf.
5.Change Date to Month (if needed).
6.Drag the Measure (e.g., Sales/Total) to the Rows shelf.
7.From the Marks card, select Area as chart type.
8.Drag a Category field (e.g., Product Line) to Color to create stacked areas.
9.Drag the Measure to Label if you want to show values.
10.Add a Title and format the chart properly.



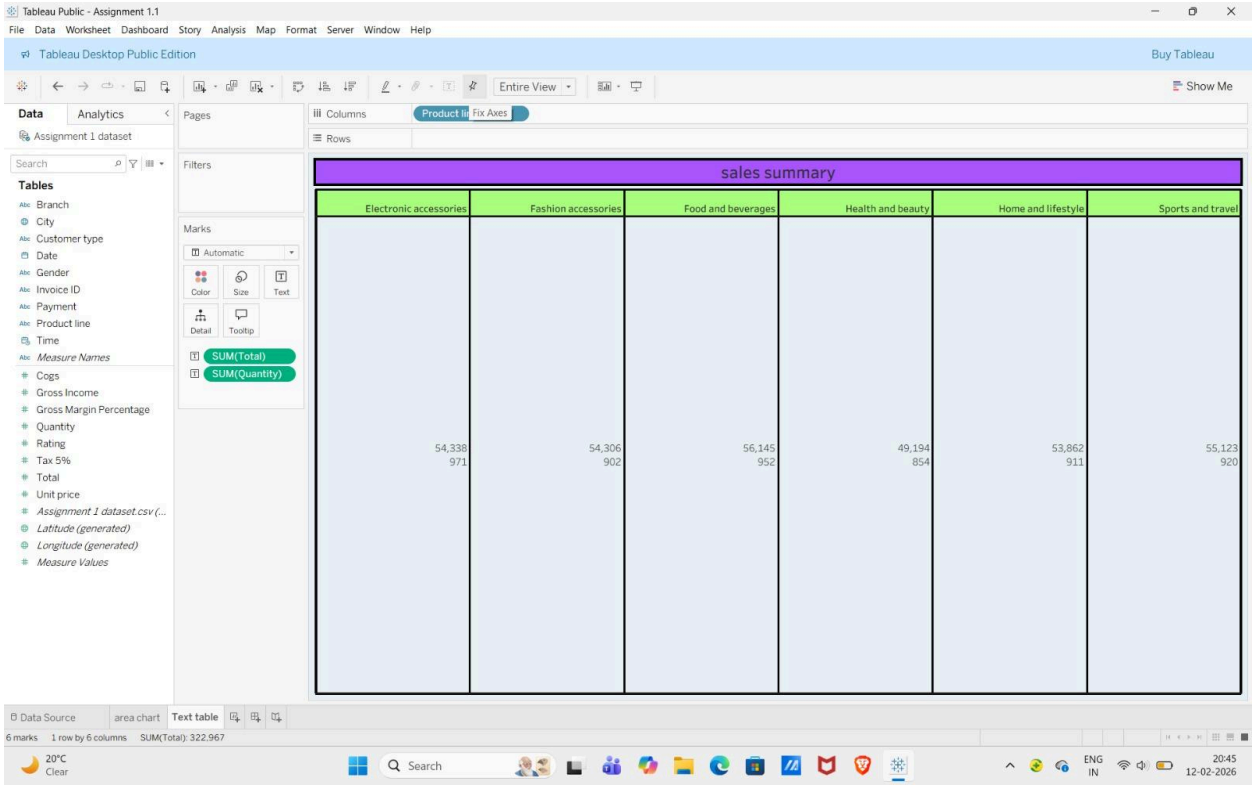
3. Sales Summary(Text Table)

Purpose:

A text table is used to display exact numerical values in rows and columns. It helps to clearly present detailed data and compare specific figures easily.

Step by steps:

1.Open New Worksheet.
2.Drag a Dimension (e.g., Product Line) to the Columns shelf.
3.Drag another Dimension (if needed) to the Rows shelf.
4.Drag the Measure (e.g., Sales/Total) to the Text on Marks card.
5.Change Marks type to Text (if not automatic).
6.Drag additional Measures (e.g., Quantity) to Text.
7 Adjust Text alignment and size.
8.Format numbers (currency, decimal places).
9.Add Grand Totals if required (Analysis → Totals).
10.Add a Title and format borders/background.



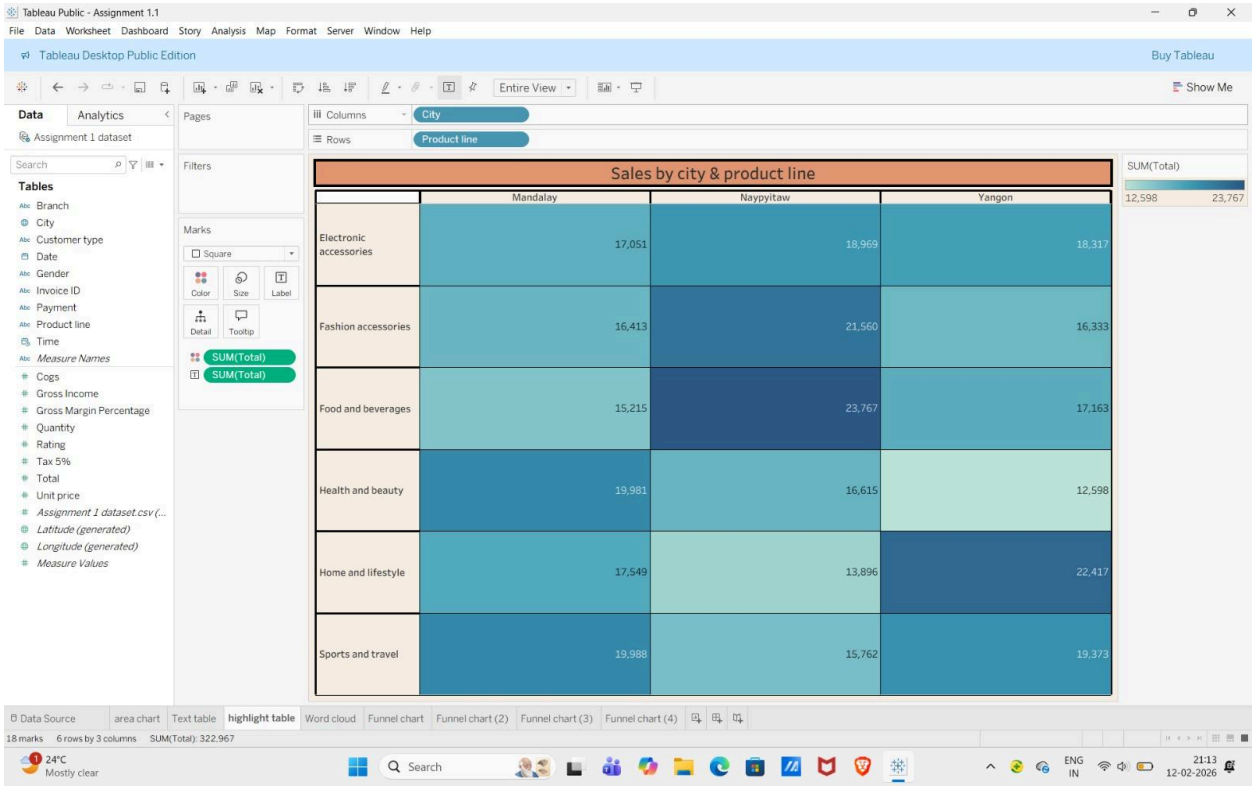
4. Sales by City & Product Line(Highlight Table)

Purpose:

A highlight table is used to compare data values using colors in a table format. It helps quickly identify high and low values through color intensity.

Step by steps:

1.Open Tableau Desktop / Public.
2.Connect to your dataset.
3.Open a New Worksheet.
4.Drag a Dimension (e.g., Product Line) to the Rows shelf.
5.Drag another Dimension (e.g., City) to the Columns shelf.
6.Drag a Measure (e.g., Sales/Total) to the Text on the Marks card.
7.Click on Show Me and select Highlight Table.
8.Tableau will apply colors automatically based on values.
9.Adjust the Color palette from the Marks card if needed.
10.Add a Title and format the table properly.



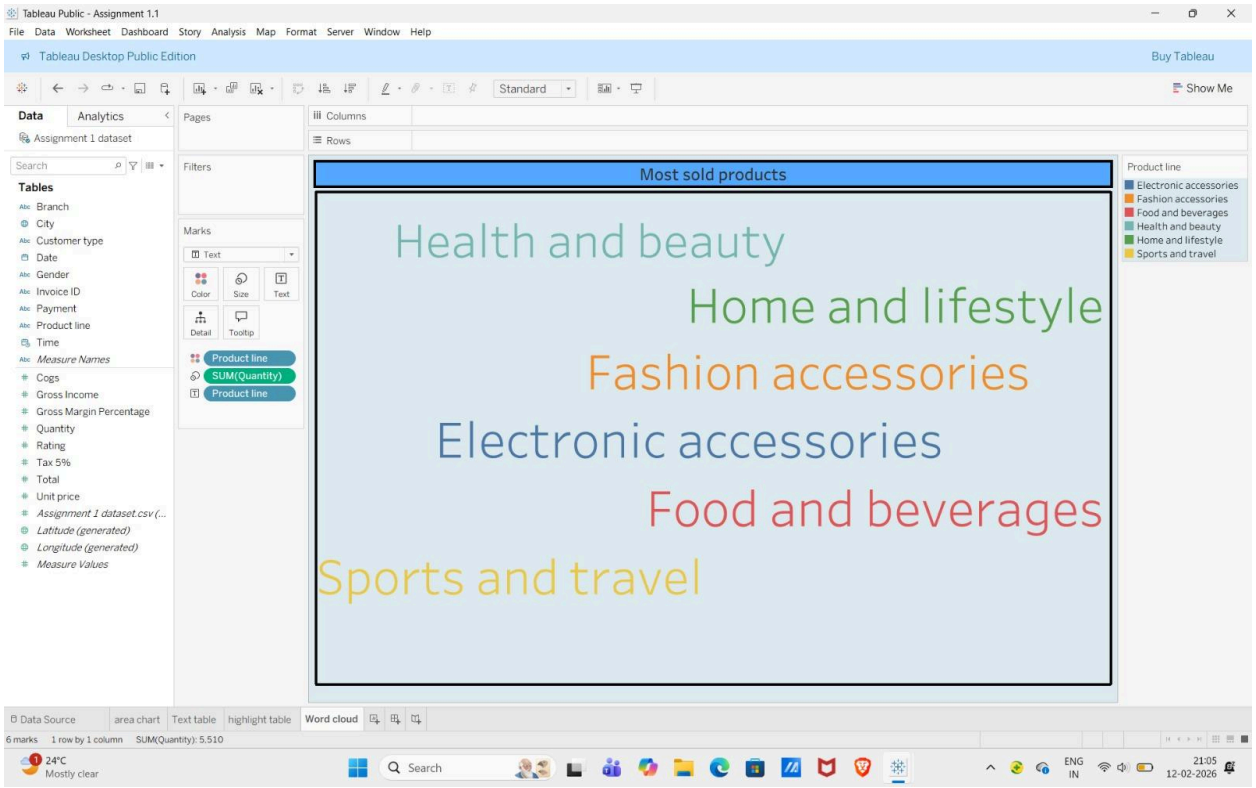
5.Word Cloud (Product Popularity)

Purpose:

A word cloud is used to display text data visually, where the size of each word represents its frequency or importance. It helps quickly identify the most significant or commonly occurring words.

Step by steps:

1.Open a New Worksheet.
2.Drag a Text Dimension (e.g., Product Line) to the view.
3.Change the Marks type to Text.
4Drag the same Dimension to the Text shelf.
5.Drag a Measure (e.g., Quantity/Sales) to the Size shelf.
6.Drag the Measure to Color (optional).
7.Increase the Size slider to enlarge words clearly.
8.Use Show Me → Word Cloud (if available).
9.Adjust font style and formatting.
10.Add a Title and finalize the design.



6.Running total by product line(Funnel Chart)

Purpose:

A funnel chart is used to show stages in a process where values decrease step by step. It helps track progress and identify where drop-offs occur in the process.

Step by steps:

1.Open Tableau Desktop / Public.
2.Connect to your dataset.
3.Open a New Worksheet.
4.Drag the Dimension (e.g., Stage/Category) to the Rows shelf.
5.Drag the Measure (e.g., Sales/Count) to the Columns shelf.
6.Sort the measure in Descending order (largest to smallest).
7.Change the Marks type to Bar.
8.Drag the same Measure again to the Size shelf on the Marks card.
9.Adjust the Size slider to create a funnel shape (bars decreasing from top to bottom).
10.Add Labels, Title, and format properly to complete the Funnel Chart**.**