

# Meeting Notes: Superstore Sales Performance Dashboard Requirements

**Date:** July 08, 2025

**Time:** N/A

**Attendees:** Lashawn Fofung (Project Manager, Business Analyst, and Data Team Lead)

**Meeting Objective:** To define and finalize the business requirements for the Superstore Sales Performance Dashboard.

## 1. Project Overview & Skills Required

- Project: Capstone Project - Superstore Sales Performance
- Skills: Data Visualization using Tableau, Data Slice and Dice, Format Data in Tableau, Data Preparation, Tableau Properties, Advanced calculations.

## 2. Data Source Requirements

- Source: Superstore.xls data.
- Connection Type: Data extract (not a 'Live' connection).

## 3. Tableau Project Requirements

- Single dashboard workbook.
- Each worksheet/view/chart must meet business requirements.
- All worksheets to be hidden upon completion.
- Workbook to be published to Tableau Public.

## 4. Business Requirements - Views/Worksheets

The dashboard will include the following views:

- **View 1: Total Sales**
  - Display: Total Sales in thousands.
  - Header: "Total Sales".
  - Color Code: "#76b7b2".
  - Tooltip: Disabled.
  - Background Color: Choice of developer.
- **View 2: Total Profit**
  - Requirements: Same as "Total Sales" view.
  - View 3: Total Volume
  - Requirements: Same as "Total Sales" view, but not a currency value.
  - View 4: Sales Per Customer
  - Requirements: Same as "Total Sales" view.
- **View 5: Pie Chart**
  - Content: Percent of Total Sales by Region.
  - Color Palette: Summer.
  - Borders: Black.
  - Tooltip Format: Region Name, Percent of Total Sales, Total Sales value formatted in currency (thousands, K). Example: "East: 29.55%, Sales: \$679K".
  - Filters: All general requirement filters to be dragged to this sheet.

- **View 6: Bar Chart**
  - Type: Horizontal Bar Chart.
  - Content: Top N states by Sales.
  - Interactivity: User to change N value via a Parameter.
  - Colors/Labels: Choice of developer for bars, labels in \$.
  - Sorting: Always descending.
- **View 7: Bubble Chart**
  - Content: Sales by sub-category.
  - Coloring: Bubbles colored by category (developer's choice of color).
  - Tooltip Format: Sub-category and Sales value in \$ (thousands, K).
- **View 8: Line Chart**
  - Type: Continuous line chart.
  - Content: Sales trend by Month-Year.
  - X-axis Format: MMM YY (e.g., Mar 22).
  - Axis Titles: Hidden.
  - Tooltip Format: Month-Year and Sales value in \$ (thousands, K).
  - Filter: Order Date as a Date Range filter.
  - Sheet Name: "Line Chart" (tab to be colored).

## 5. Dashboard Requirements

- Name: Sales Dashboard
- Title: Superstore Sales Performance
- Description: Sales overview of the superstore data
- Size: FIXED (Width: 1055, Height: 850).

## 6. Dashboard Filters

- **Filters to be present:**
  - Order Date: Show as Range of date, applied to all worksheets.
  - Segment: Show as multiple values (drop-down) with Apply button, showing relevant values, applied to all worksheets.
  - Ship Mode: Show multiple values (drop-down) with Apply button, showing relevant values, applied to all worksheets.
  - State: Show multiple values (drop-down) with Apply button, showing relevant values, applied to all worksheets except the bar chart.
- **Filter Formatting:**
  - Background color: Choice of developer.
  - Borders: Add if necessary.
  - Placement: All filters in a horizontal container, evenly distributed.

## 7. Dashboard Containers (Arrangement)

- Horizontal Container 1 ("Title/Logo"): Dashboard name and shopping cart image (transparent background) to the left.
- Horizontal Container 2 ("Filters"): All filters, evenly distributed.
- Horizontal Container 3: All scorecards (Total Sales, Total Profit, Total Volume, Sales per Customer).
- Horizontal Container 4: Pie Chart and Bar Chart.
- Horizontal Container 5: Bubble Chart and Line Chart.
- Vertical Container: All horizontal containers stacked top to bottom in the numbered order.

## **8. Dashboard Formatting**

- Legends: Hide titles, place next to associated charts without overlapping.
- Borders: Add as needed per chart or container for visual clarity.
- Fit View: "Entire View" where applicable.
- Sheet Titles: Meaningful titles for each visualization.
- Hide Sheets: All sheets to be hidden after dashboard publication.
- Unused Fields: Optional cleanup of unused fields.

## **9. Actionable Filters & Parameters**

- Actionable Filters: Pie chart and Bubble chart.
- Parameters: Place near the Bar chart, on the sheet title.