CHAPTER 1: INTRODUCTION (01–03)

In the modern business environment, data visualization plays a crucial role in decision-making. Tableau is one of the leading tools used for visualizing data and generating interactive dashboards.

In this project, we have created a **Sales Dashboard** using Tableau by analyzing a given dataset that contains information about sales, revenue, market regions, product performance, and customer details.

Our goal was to:

- Understand patterns and trends in the data.
- Identify top-performing markets, products, and customers.
- Enable year-over-year revenue comparison.

This report explains the entire process — from data preparation to dashboard creation and insights generation using Tableau.

CHAPTER 2: REQUIREMENTS (04)

Software & Tools Used:

- **Tableau Desktop**
- **Microsoft Excel** (for dataset)
- **SQL Concepts (Filtering, Grouping, Sorting)**

System Requirements:

- Windows 10 or higher / macOS
- 4 GB RAM or higher
- Tableau Public or Tableau Desktop installed

CHAPTER 3: SCRIPT AND OUTPUT (05–07)

Steps Followed While Creating Individual Sheets in Tableau

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1. Data Connection:

- Opened Tableau and connected to the **Sales dataset** (Excel or CSV).
- Verified that the dataset included necessary fields such as:
    - Revenue
    - Sales Quantity
    - Market
    - Product
    - Customer
    - Month
    - Year

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2. Creating Individual Sheets:

📌 **1. Revenue by Market Sheet**

Goal: Show total revenue generated from each market.

Steps:

- Drag **Market** to the Rows shelf.
- Drag **Revenue** to the Columns shelf.
- Sort the bars in **descending** order.
- Convert it to a **bar chart**.
- Format revenue labels in **Millions (M)**.
- Add **color gradient** to bars.
- Rename the sheet to **Revenue by Market**.

📌 2. Sales Quantity by Market Sheet

Goal: Show quantity sold per market.

Steps:

- Drag **Market** to Rows.
- Drag **Sales Quantity** to Columns.
- Sort the bars in descending order.
- Format values to show in **Thousands (K)**.
- Apply distinct colors.
- Rename the sheet to **Sales Quantity by Market**.

📌 3. Top 5 Customers Sheet

Goal: Display customers contributing the most revenue.

Steps:

- Drag **Customer Name** to Rows.
- Drag **Revenue** to Columns.
- Apply a **Top N filter** (Top 5 by Revenue).
- Sort and add color to bars.
- Rename the sheet to **Top 5 Customers**.

📌 4. Top 5 Products Sheet

Goal: Show highest selling products by quantity.

Steps:

- Drag **Product Name/ID** to Rows.
- Drag **Sales Quantity** to Columns.
- Apply **Top 5 filter** on product.
- Format and sort the data.
- Rename the sheet to **Top 5 Products**.

📌 5. Revenue by Year Sheet

Goal: Compare revenue between 2018 and 2019 for July.

Steps:

- Drag **Year** to Columns.
- Drag **Revenue** to Rows.
- Apply a filter on **Month** and select **July**.
- Format axis in Millions.
- Change marks to **Circle/Dot**.
- Rename sheet to **Revenue by Year**.

🔄 Additional Steps Applied on All Sheets:

- **Year and Month filters** were added across all sheets.
- Enabled **"Use as Filter"** option to link sheets interactively in the dashboard.
- Applied **consistent formatting** and **color scheme** across charts.
- Ensured **informative tooltips** are visible on hover for better UX.

CHAPTER 4: CONCLUSION (08)

This project allowed us to understand how to transform raw data into meaningful visual insights using Tableau. We successfully built interactive sheets that visualize:

- Revenue and Sales by Market
- Top-performing Products and Customers
- Yearly Revenue Comparison

We also learned how to apply filters, sorting, formatting, and dashboard interactivity using Tableau. The knowledge of basic **SQL concepts** such as filtering, sorting, and grouping helped us understand how Tableau processes data behind the scenes.