

D210 Dashboard How-To Manual

- 1) Both the churn_data and telecom CSV files need to be loaded into Tableau. However, they are not relational databases, so they should not be joined or merged.
- 2) Age Visualization
 - a. Create a measure called "Count of Customers A" in churn data by creating a calculated field as COUNT([Customer id])
 - b. Age as columns
 - c. Count of Customers A as rows
 - d. Label as Count of Customers A
 - e. Repeat for telcom data
- 3) Gender Visualizations:
 - a. Gender as columns
 - b. Count of Customers A(B) as rows
 - c. Color by gender
 - d. Label as Count of Customers A(B) as percent of total
- 4) Marital Status Visualizations
 - a. Create a calculated field from Marital from churn_data as:

IF [Marital] = 'Married' THEN 'Married'

ELSE 'Not Married'

END
to Marital Status to be inline telcom data
 - b. Marital Status as columns
 - c. Count of Customers A(B) as rows
 - d. Color by Marital Status
 - e. Label as Count of Customers A(B) as percent of total
 - f. Label as Marital Status
- 5) Create a Customer Demographics Dashboard
 - a. Drag marriage and gender worksheets to the dashboard
 - b. Remove excess filters
 - c. Apply filters to all worksheets
 - d. Add titles
 - e. Add blank space for aesthetics
- 6) Internet Type and Monthly Charge Visualizations
 - a. Rename churn_data Internet Service as Internet Type to align with telcom data.
 - b. Internet Type as columns
 - c. Count of Customers A(B) as rows
 - d. Color by Internet type
 - e. Label as monthly charge median
 - f. Repeat for telcom data
- 7) Monthly GB vs Monthly Charge
 - a. Monthly charge as columns

- b. Average Monthly charge as rows
 - c. Color by Internet Type
 - d. Insert trend line from Analytics tab
 - e. Repeat for telecom data
- 8) Data Use and Monthly Charge Dashboard
 - a. Drag Internet Type and Monthly Charge Visualizations and Monthly GB vs Monthly Charge worksheets to the dashboard
 - b. Remove excess filters
 - c. Apply filters to all worksheets
 - d. Add titles
 - e. Add blank space for aesthetics
- 9) Story
 - a. Add story page titles
 - b. Link dashboards to pages