**Tableau Dashboard Project Requirements**

**1. Sales & Performance Dashboard**

**Dashboard Purpose**

This dashboard provides an overview of the company’s sales, profits, quantities, and product performance over time. It is designed to help business users understand trends and identify opportunities for growth and improvement.

**Key Requirements**

**KPI Overview**

* Display a summary of:
  + Total Sales
  + Total Profit
  + Total Quantity
* Include comparisons for the **Current Year** vs **Previous Year**.

**Sales Trends**

* Show monthly trends for Sales, Profit, and Quantity.
* Include both the Current Year and Previous Year.
* Highlight the months with **highest** and **lowest** sales for quick recognition.

**Product Subcategory Comparison**

* Compare Sales by Product Subcategory across Current and Previous Years.
* Include Profit comparison alongside Sales.

**Weekly Trends for Sales & Profit**

* Visualize weekly trends for Sales and Profit for the Current Year.
* Display the **average weekly values**.
* Highlight weeks that are **above** and **below** the average to draw attention to performance changes.

**2. Customer Dashboard**

**Dashboard Purpose**

This dashboard helps marketing and management teams monitor customer activity, purchasing behavior, and loyalty. It enables segmentation and targeted strategy development for customer satisfaction and retention.

**Key Requirements**

**KPI Overview**

* Display:
  + Total Number of Customers
  + Sales per Customer
  + Total Number of Orders
* Include comparisons between the **Current Year** and **Previous Year**.

**Customer Trends**

* Monthly trend breakdown for all KPIs.
* Comparison of Current and Previous Year.
* Highlight peak and low-performing months.

**Customer Distribution by Number of Orders**

* Show distribution of customers based on how many orders they've placed.
* Helps understand customer engagement, loyalty, and purchasing frequency.

**Top 10 Customers by Profit**

* Display the top 10 customers who contributed the most profit.
* Include:
  + Rank
  + Number of Orders
  + Current Sales
  + Current Profit
  + Last Order Date

**3. Design & Interactivity Requirements**

**Dashboard Dynamics**

* Allow users to select and view data for any desired year.
* Enable smooth navigation between different dashboards.
* Make charts interactive so that users can filter data directly through visual elements.

**Data Filters**

* Include filters based on:
  + Product Information (Category, Subcategory)
  + Location Information (Region, State, City)

**4. Additional Analytical Requirements**

1. **Sales and Profit by Customer**: Generate a report showing sales and profit per customer.
2. **Sales Forecast Report**: Create a forecast visualization based on historical sales trends.
3. **Waterfall Chart**: Build a Waterfall chart for Sales broken down by Subcategory.
4. **Lollipop Chart**: Use a Lollipop chart to clarify the relationship between Category and Sales.
5. **Category Comparison Chart**: Compare any three product categories using a visualization of your choice.
6. **Data Table**: Convert the chart from point 5 into a data table, keeping both representations.
7. **Total Values**: Calculate and display total values from the data table in point 6.
8. **KPI Cards**:
   * Total Sales
   * Total Profit
   * Profit Ratio
   * Quantity Count
   * Number of Customers
9. **Map Visualization**:
   * Show Sales and Profit per Region
   * Add tooltip details and use the map as a filter
10. **Donut Chart**:
    * Display Total Profit in "$K"
    * Show % contribution of each Region
11. **Sets Visualization**:
    * Use sets to display **Top** and **Bottom Profit** segments in one view
12. **Orders vs Returns**:
    * Create a Line Chart comparing Orders and Returns across Product Subcategories
13. **Parameterized Subcategory View**:
    * Enable a parameter to toggle views for:
      + Quantity
      + Sales
      + Profit
14. **Interactive Product Dashboard**:
    * Sales by Product Category
    * Sales & Profit by Product Name
    * Sales by Region and State
15. **Overview Dashboard**:
    * Combine and link all dashboards together for centralized access
16. **Story Points**:
    * Sales Forecast
    * Lollipop Chart
    * Donut Chart
    * Top vs Bottom Profit Insight