



Tableau Sales & Customer Report

Sales & Customer Dashboard Outline

Introduction:

User story outlines the specifications for building two dashboards using tableau to help stakeholders, including sales managers and executives, to analyze sales performance and customers.

Sales Dashboard | Requirements

Dashboard Purpose

The purpose of the sales dashboard is to present an overview of the sales metrics and trends in order to analyze YoY sales performance and understand sales trends.

Key Requirements

KPI Overview

~ Display a summary of **total sales, profits and quantity** for the **current year** and the **previous year**.

Sales Trends

~ Present the data for each **KPI monthly** for both the **current** and the **previous** year

~ Identify **months** with the **highest** and **lowest sales** and make them easy to recognize

Product Subcategory Comparison

~ Compare **sales performance** by different subcategories for the current year and the previous year.

~ Include a **comparison of sales with profit**.

Weekly Trends for Sales & Profit

~ Present **weekly sales** and **profit** data for the **current year**.

~ Display the **average weekly values**.

~ Highlight weeks that are **above and below the average** to draw attention to sales & profit performance

Outline | Customers

Dashboard purpose

The customer aims to provide an overview of **customer data, trends and behaviors**. It will help marketing teams and management to understand customer segments and improve customer satisfaction.

Key Requirements:

KPI Overview

Display a summary of **total numbers of customers, total sales per customer** and **total number of orders** for the **current year** and the **previous year**.

Customer Trends

- Present the data for each **KPI monthly** for both the **current year** and the **previous year**.
- Identify **months** with **highest** and **lowest sales** and make them easy to recognize.

Customer distribution by Number of Orders

Represent the distribution of customers based onto the number of orders they have placed to provide insights into customer behavior, loyalty and engagement.

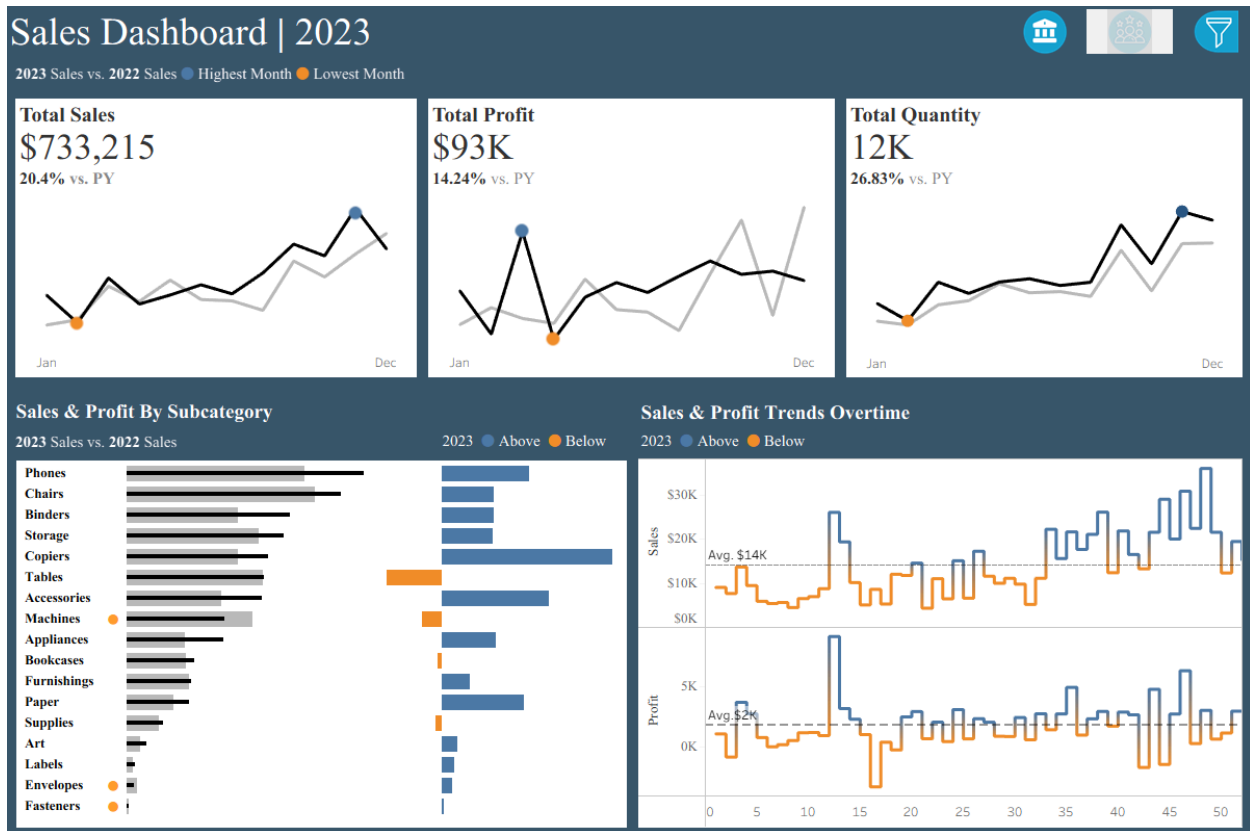
Top 10 Customers By Profit

- Present the top **10 customers** who have generated the **highest profits** for the company.

Show additional information like **rank**, **number of orders**, **currents sales**, **current profit** and the **last order** date.

Completed Interactive Dashboard

Sales



Customer

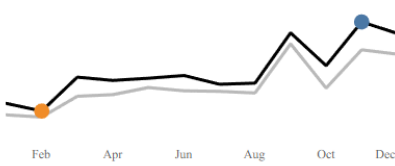
Customer Dashboard | 2023

2023 Sales vs. 2022 Sales ● Highest Month ● Lowest Month

Total Customers

693

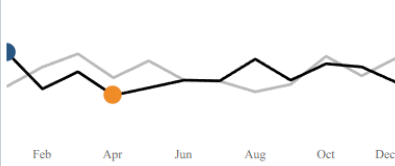
8.62% vs. PY



Sales Per Customer

1,058

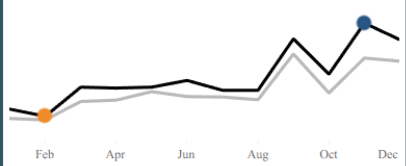
10.80% vs. PY



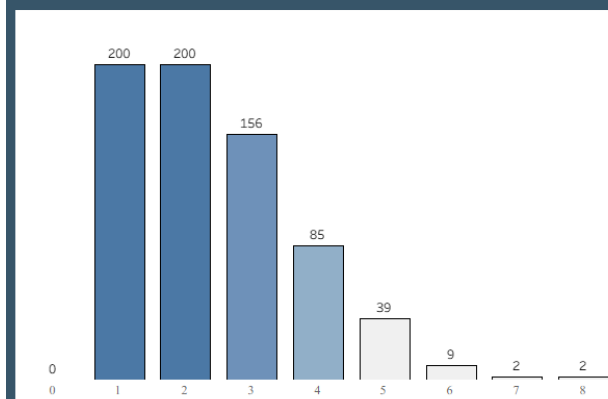
Total Orders

9,994

28.29% vs. PY



Customer Distribution By Nr. of Orders 2023



Top Customers By Profit 2023

Rank	Customer	Last Order	2023 Profit	2023 Sales	2023 Orders
#1	Raymond Buch	9/25/2023	\$6,781	\$14,203	3
#2	Hunter Lopez	11/17/2023	\$5,046	\$10,523	2
#3	Tom Ashbrook	10/22/2023	\$4,599	\$13,723	2
#4	Andy Reiter	12/24/2023	\$2,608	\$5,821	2
#5	Jane Waco	11/18/2023	\$1,953	\$5,385	4
#6	Helen Wasserman	9/4/2023	\$1,947	\$8,166	5
#7	Brian Moss	11/27/2023	\$1,938	\$5,683	5
#8	Alan Dominguez	12/1/2023	\$1,867	\$5,434	4
#9	Jim Epp	11/12/2023	\$1,704	\$4,074	4
#10	Steven Roelle	6/17/2023	\$1,676	\$3,506	1

Filter

