Tableau Training

Course-End Project Problem Statement

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Course-End Project 2: Comparison of Region Based on Sales

Problem Scenario:

The director of a leading organization wants to compare the sales between two regions. He has asked each region operators to record the sales data to compare by region. Upper management wants to visualize the sales data using a dashboard to understand the performance between them and suggest the necessary improvements.

Objective:

Help the organization by creating a dashboard to visualize the sales comparison between two selected regions.

Datasets:

Sample Superstore

Steps to Perform:

1. Select Sample Superstore as Dataset
   1.a. Use Sample Superstore Dataset
   1.b. Select Data
   1.c. Use Group by from Data Source Table on a Folder to create a folder to segregate the required data
2. Create a hierarchy called Location
3. Create two parameters: Primary Region and Secondary Region with all regions listed in them.
   3.a. Create Parameters for Primary Region and Secondary Region
   3.b. Create a Calculated Field for both Primary Region and Secondary Region

   Give name as **Filter: Primary Region**. Type the given code:

   > **IF [Region] = [Primary Region] THEN "True"**
   >
   > **ELSE "False"**
   >
   > **END**

   Also, create another name as **Filter: Secondary Region**. Type the given code:

   > **IF [Region] = [Secondary Region] THEN "True"**
   >
   > **ELSE "False"**
   >
   > **END**

4. Create a First Order Date

     4.a.Create a Calculated Field and name it the First Order Date

Write the following command:

{FIXED [Region] : MIN ([Order Date]) }

Sheet 1

Drop field here

First Order Date   ✕

{ FIXED [Region] : MIN([Order Date]) }

▶

Drop
field
here

The calculation is valid.   Apply   OK
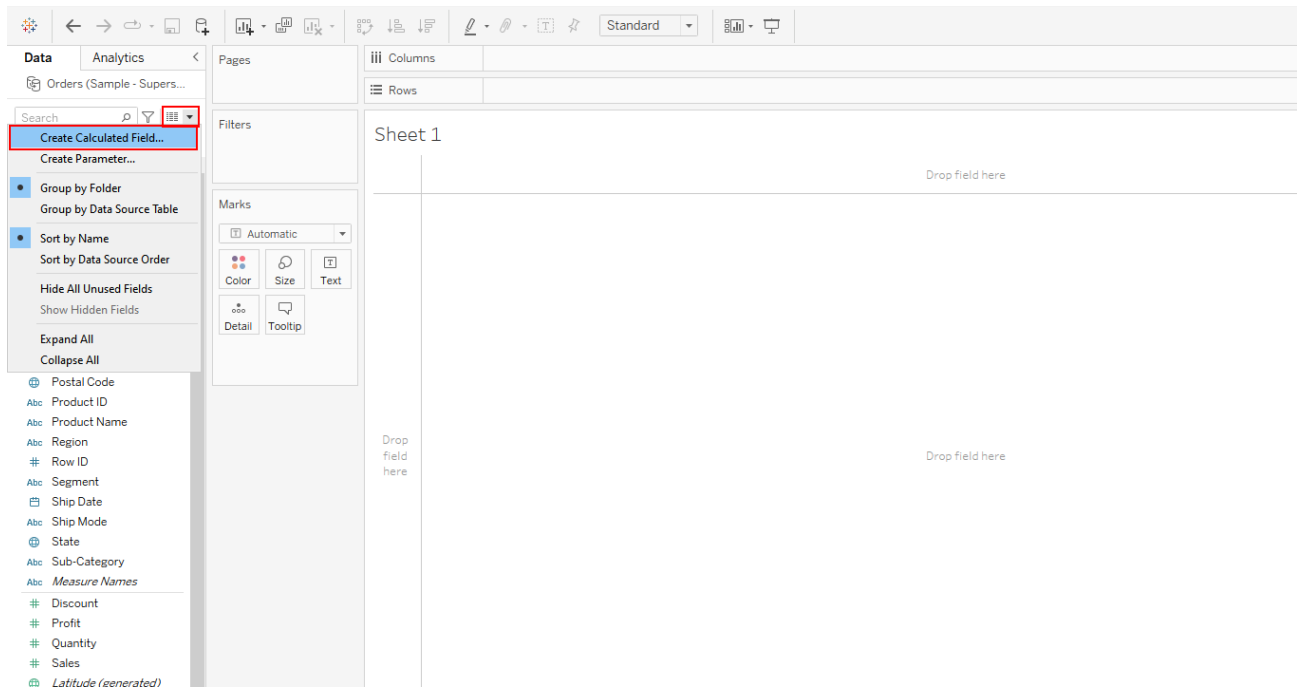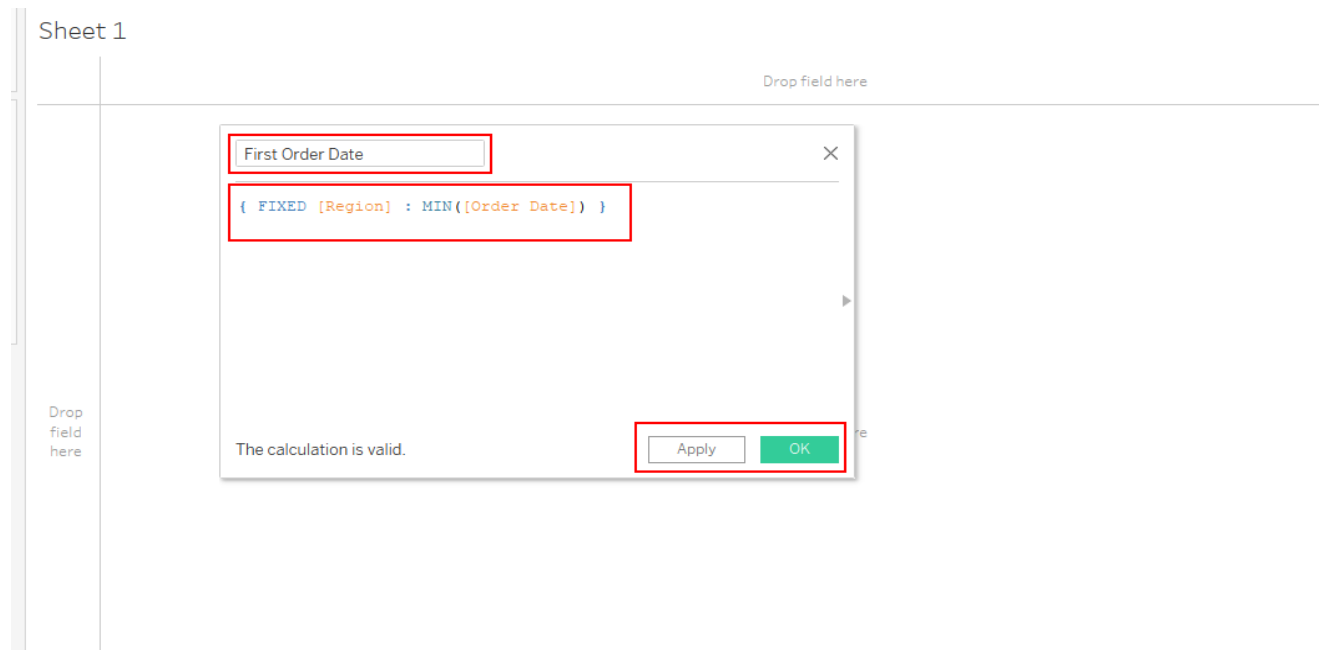
5. Create a dashboard

    5.a. Align all sheets in the dashboard

6. Partition the dashboard to display the below details of Primary Region and Secondary Region

    6.a.   First Order Date

    6.b.   Total Sales

    6.c.   Average Sales per Order

    6.d.   No of Customers

    6.e.   No of Orders

    6.f.   No of Products in Sale

Sample Output:

Sales Comparisons by Region

Primary Region   **Secondary Region**

Central   East

First Order Date: 1/3/2016   First Order Date: 1/5/2016

Total Sales: $501,240   Total Sales: $678,781

Average Sales per Order: $216   Average Sales per Order: $238

No of Customers: 629   No of Customers: 674

No of Orders: 1,175   No of Orders: 1,401

No of Products in Sale: 1,295   No of Products: 1,415

Sub-Category	Total Sales	Minimum Sales	Maximum Sales
Accessories	$33,956	$2	$2,197
Appliances	$23,582	$2	$2,870
Art	$5,765	$3	$245
Binders	$56,923	$1	$9,899
Bookcases	$24,157	$68	$2,595
Chairs	$85,231	$48	$3,696
Copiers	$37,260	$320	$17,500
Envelopes	$4,637	$2	$690
Fasteners	$778	$2	$63
Furnishings	$15,254	$2	$1,351
Labels	$2,451	$3	$592
Machines	$26,797	$210	$8,160
Paper	$17,492	$4	$1,162
Phones	$72,403	$8	$2,994
Storage	$45,930	$13	$2,191
Supplies	$9,467	$2	$4,164
Tables	$39,155	$69	$2,679

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