**Lesson 5 Demo 01**

**Filtering Data**

**Business Scenario:**

The general manager of an e-commerce company is planning to create a list of customers who have returned most of the orders they had placed. To take substantial measures for upcoming orders, he needs to create a list visualization for customers who have returned more than half of their distinct orders in each region.

* Which region has the highest number of products returned by customers? (Note: Change the view to text)
* How many customers do you have on your list?

**Overview:**

* Use a left join between orders and returns tables
* Create a list of customer name
* Apply a filter on customer name with the formula:

COUNTD([Order ID (Returns)]) >= COUNTD([Order ID])/2

* Use order ID in the text shelf with distinct count aggregation
* Sort the view in descending order of count of orders

The result should resemble the image given below:

Chart, bar chart

Description automatically generated

**Detailed Instructions:**

1. Open **Tableau 10.x** (You can go to Start Menu -> All Programs -> Tableau 10.x)
2. On the home page, under **Connect**, under **To a file**, click **Microsoft Excel**

Chart

Description automatically generated with medium confidence

1. Browse and connect to the **Sample - Superstore** Excel file (NOTE: Provided in assisted practice)Graphical user interface, text

   Description automatically generated
2. Drag and drop **Orders** table on the canvas area

Graphical user interface, application

Description automatically generated

1. Double-click on **Order**Graphical user interface, text, application

   Description automatically generated
2. Drag and drop **Returns** table on the canvas areaGraphical user interface, application

   Description automatically generated
3. Change the type to **Left** join

Graphical user interface, application

Description automatically generated

1. Go to **Sheet 1**Graphical user interface, text

   Description automatically generated
2. Place the **Customer Name** dimension in the **Rows** shelf

Graphical user interface, application

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1. Place the **Customer Name** dimension in the **Filters** shelf

Graphical user interface, application

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1. Go to the **Condition** tabGraphical user interface

   Description automatically generated
2. Click the **By formula** radio button and enter the formula:

**COUNTD([Order ID (Returns)]) >=COUNTD([Order ID])/2**

Graphical user interface

Description automatically generated

1. In the Data pane, drag **Order ID** to the Text shelf and change the aggregation function to **Distinct Count**

Graphical user interface, application

Description automatically generated

1. **Sort** the view in descending order of **count of orders**

Graphical user interface, application

Description automatically generated

1. From Dimensions, place the **Region** field in **color**

A picture containing chart

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1. Rename the sheet as **Filtering**

Graphical user interface, application

Description automatically generated

1. Save the workbook as **Lesson 4 - Exercises**

Graphical user interface, text, application

Description automatically generated

1. Keep the workbook open to perform the next exercise

Chart, bar chart

Description automatically generated

**Answers:**

Based on the view, these are the answers to the questions in the problem statement:

1. Which region has the highest number of products returned by the customers?

Answer: **West**

1. How many customers do you have on your list?

Answer: **10**