Tableau

Lesson-End Project Problem Statement



**Sales Dashboard**

**Problem Statement:**

Natalie Mounier, the CEO of a retail products company, is very focused on the sales of her company’s products, as she needs to deliver a presentation on the company’s sales results to the Board of Directors every quarter. Natalie is also responsible for setting sales performance targets for her sales teams in each region. Therefore, she is also interested in sales performance across the company’s four regions.   
She wants to build a dashboard with some metrics about products such as sales, profits, profit ratio, etc. She also wants to be able to see the trends of these statistics over time and filter down to one, more than one, or all geographic regions.

**Objective:**

To create a dashboard that showcases the trend of sales over time.

**Tasks to be performed:**

1. Use the saved Sample Superstore dataset
2. Connect to the saved Sample superstore dataset
3. Create a table that shows sales, profit, profit ratio, profit per order, sales per customer, average discount, and quantity
4. Drag Measure Names
5. Drag Region and Order Date
6. Drag Measure Values
7. Format the measures
8. Rename the worksheet
9. Create a map that presents sales by geography
10. Drag the Latitude and Longitude
11. Add Order Date, Region, and Profit Ratio
12. Drag Postal Code and State
13. Drag Sales and Profit
14. Change the Color coding
15. Rename the worksheet
16. Create two trend charts, one that shows monthly sales by segment and another that shows monthly sales by category
17. Drag month of Order Date
18. Drag Segment
19. Drag Order Date and Region
20. Drag Sales
21. Create a calculated field called Order Profitable?
22. Use the Show Me feature to create a line chart
23. Rename the sheet as Sales by Segment
24. Duplicate Sales by Segment
25. Replace Segment with Category
26. Rename the sheet as Sales by Category
27. Create a dashboard called Sales Dashboard
28. Add three views to the dashboard
29. Add filters for Order Date, Region, and Profit Ratio
30. Create and add Filter Action