LOGO

Tableau Workbook Name: Customer Analysis.twb

Background:			
Requested by:		Requested date:	
Developed by:		Completed date:	
Audience:			

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Summary Stats

	Counts
Dashboards #	1
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Data Source #	1
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Data Source

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Worksheets Mapping

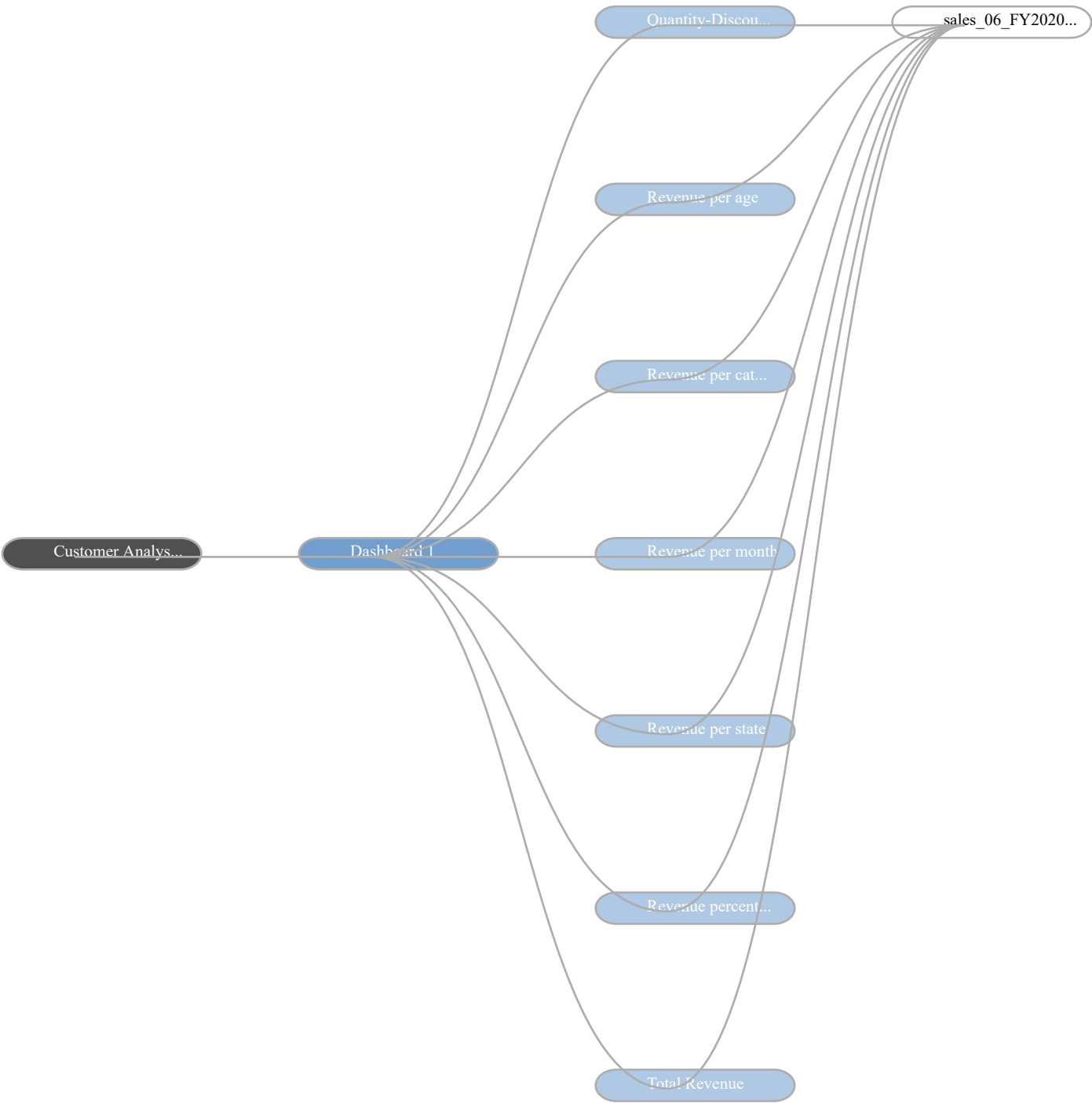| Dashboard/Storyboard Name	Worksheet Name	Object Type (Dashboard/Storyboard)	Used?
Dashboard 1	Revenue per month	Dashboard	Yes
Dashboard 1	Revenue per state	Dashboard	Yes
Dashboard 1	Revenue per age	Dashboard	Yes
Dashboard 1	Quantity-Discount Correlation	Dashboard	Yes
Dashboard 1	Revenue per category & Gender	Dashboard	Yes
Dashboard 1	Revenue percentage per region	Dashboard	Yes
Dashboard 1	Total Revenue	Dashboard	Yes

Worksheets Mapping

Dashboard/Storyboard Name	Worksheet Name	Object Type (Dashboard/Storyboard)	Used?

Tables and Fields

Data Source	Source Database	Table Name	Field Name	Remote Field	Data Type	Used	Dimension/ Measure	Hidden
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	order_id	order_id	integer	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	order_date	order_date	date	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	status	status	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	item_id	item_id	real	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	sku	sku	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	qty_ordered	qty_ordered	real	Yes	Measure	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	price	price	real	No	Measure	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	value	value	real	No	Measure	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	discount_amount	discount_amount	real	No	Measure	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	total	total	real	Yes	Measure	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	category	category	string	Yes	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	payment_method	payment_method	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	bi_st	bi_st	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	cust_id	cust_id	real	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	year	year	integer	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	month	month	string	Yes	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	ref_num	ref_num	integer	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Name Prefix	Name Prefix	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	First Name	First Name	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Middle Initial	Middle Initial	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Last Name	Last Name	string	No	Dimension	No

Data Source	Source Database	Table Name	Field Name	Remote Field	Data Type	Used	Dimension/Measure	Hidden
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Gender	Gender	string	Yes	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	age	age	real	Yes	Measure	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	full_name	full_name	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	E Mail	E Mail	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Customer Since	Customer Since	date	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	SSN	SSN	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Phone No.	Phone No.	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Place Name	Place Name	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	County	County	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	City	City	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	State	State	string	Yes	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Zip	Zip	integer	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Region	Region	string	Yes	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	User Name	User Name	string	No	Dimension	No
sales_06_FY2020-21 copy	textscan	sales_06_FY2020-21 copy.csv	Discount_Percent	Discount_Percent	real	Yes	Measure	No

Calculated Fields

Calculated Field Name	Tableau Field Name	Data Source Name	Formula	Used?	Dimension/Measure
Age bins	Age (bin)	sales_06_FY2020-21 copy	[age]	Yes	Dimension
Zero	Calculation_1447344374101913600	sales_06_FY2020-21 copy	0	Yes	Measure
Female Revenue	Calculation_1447344374105694209	sales_06_FY2020-21 copy	IF [Gender]= 'F' THEN [total] END	Yes	Measure
Male Revenue	Calculation_1447344374105927682	sales_06_FY2020-21 copy	IF [Gender]='M' THEN [total]END	Yes	Measure

Workbook	→	Dashboards	→	Worksheets	→	Data Sources

Customer Analys...

Dashboard 1

Quantity-Discou...

Revenue per age

Revenue per cat...

Revenue per month

Revenue per state

Revenue percent...

Total Revenue

sales_06_FY2020...

Unused Objects in Workbook

Unused Fields

Data Source Alias	Field Name
sales_06_FY2020-21 copy	order_id
sales_06_FY2020-21 copy	order_date
sales_06_FY2020-21 copy	status
sales_06_FY2020-21 copy	item_id
sales_06_FY2020-21 copy	sku
sales_06_FY2020-21 copy	price
sales_06_FY2020-21 copy	value
sales_06_FY2020-21 copy	discount_amount
sales_06_FY2020-21 copy	payment_method
sales_06_FY2020-21 copy	bi_st
sales_06_FY2020-21 copy	cust_id
sales_06_FY2020-21 copy	year
sales_06_FY2020-21 copy	ref_num
sales_06_FY2020-21 copy	Name Prefix
sales_06_FY2020-21 copy	First Name
sales_06_FY2020-21 copy	Middle Initial
sales_06_FY2020-21 copy	Last Name
sales_06_FY2020-21 copy	full_name
sales_06_FY2020-21 copy	E Mail
sales_06_FY2020-21 copy	Customer Since
sales_06_FY2020-21 copy	SSN
sales_06_FY2020-21 copy	Phone No.
sales_06_FY2020-21 copy	Place Name
sales_06_FY2020-21 copy	County
sales_06_FY2020-21 copy	City
sales_06_FY2020-21 copy	Zip
sales_06_FY2020-21 copy	User Name

Dashboards

Dashboard Name: Dashboard 1
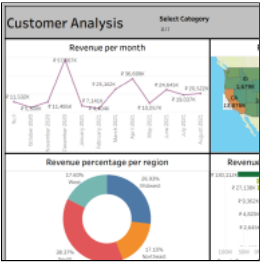
Dashboard 1 Summary Stats

	Counts
Worksheets	7
Parameters	0
Quick Filters	2
Actions	5

Below Worksheets were used in "Dashboard 1" Dashboard

- Revenue per month
- Revenue per state
- Revenue per age
- Quantity-Discount Correlation
- Revenue per category & Gender
- Revenue percentage per region
- Total Revenue

Quick filters Applied

Field Name	Sheet Name	Apply to
Region		Selected
Category		Selected

Actions

Action Name	Action Type	Source Sheet	Target Sheet	Run Action On	Target Filter(s)
Filter 1 (generated)	Filter	Revenue per month	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All
Filter 2 (generated)	Filter	Revenue per state	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All
Filter 3 (generated)	Filter	Revenue per age	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All
Filter 4 (generated)	Filter	Revenue percentage per region	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All
Filter 5 (generated)	Filter	Quantity-Discount Correlation	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All

Worksheets

Worksheet Name: Quantity-Discount Correlation

Worksheet was used in the following Dashboards
- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Filters

Field Name	Field Selection	Selected Field Value(s)	Field Wildcard	Field Condition	Field Limit	Context Filter
Action (Region)	Use all		All	None	None	No
Discount_Percent	In-Range	Minimum: 1.0	All	None	min[1.0]	No

Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter 5 (generated)	Quantity-Discount Correlation	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All

Columns & Rows in Worksheet

Field Name	Column/Row
Qty Ordered	Rows
Discount Percent	Columns

Worksheet Name: Revenue per age

Worksheet was used in the following Dashboards
- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Filters

Field Name	Field Selection	Selected Field Value(s)	Field Wildcard	Field Condition	Field Limit	Context Filter
Action (Region)	Use all		All	None	None	No

Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter 3 (generated)	Revenue per age	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All

Marks

Mark Class: Bar

Object(s) Used	Mark Type
Sum (Total)	Color

Calculated Fields Used

Field Name	Formula
Age bins	[age]

Columns & Rows in Worksheet

Field Name	Column/Row
Sum (Total)	Rows
Age bins	Columns

Worksheet Name: Revenue per category & Gender

Worksheet was used in the following Dashboards
- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Filters

Field Name	Field Selection	Selected Field Value(s)	Field Wildcard	Field Condition	Field Limit	Context Filter
Action (Region)	Use all		All	None	None	No

Marks

Mark Class: Automatic

Object(s) Used	Mark Type
Sum (Female Revenue)	Color
Sum (Total)	Label
Sum (Male Revenue)	Color
Sum (Total)	Label
Category	Label

Calculated Fields Used

Field Name	Formula
Zero	0
Female Revenue	IF [Gender]= 'F' THEN [total] END
Male Revenue	IF [Gender]='M' THEN [total]END

Applied Sortings

Field Name	Sort By	Sort Order	Aggregation Field	Aggregation Type
Category	Nested	Descending	Female Revenue	Sum

Worksheet Name: Revenue per month

Worksheet was used in the following Dashboards

- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Filters

Field Name	Field Selection	Selected Field Value(s)	Field Wildcard	Field Condition	Field Limit	Context Filter
Action (Region)	Use all		All	None	None	No

Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter 1 (generated)	Revenue per month	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All

Marks

Mark Class: Automatic

Object(s) Used	Mark Type
Sum (Total)	Label

Columns & Rows in Worksheet

Field Name	Column/Row
Sum (Total)	Rows
Month (Month)	Columns

Worksheet Name: Revenue per state

Worksheet was used in the following Dashboards
- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Filters

Field Name	Field Selection	Selected Field Value(s)	Field Wildcard	Field Condition	Field Limit	Context Filter
Action (Region)	Use all		All	None	None	No

Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter 2 (generated)	Revenue per state	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All

Marks

Mark Class: Automatic

Object(s) Used	Mark Type
State	Label
Sum (Total)	Label
State	Detail
Sum (Total)	Color

Columns & Rows in Worksheet

Field Name	Column/Row
Latitude (generated)	Rows
Longitude (generated)	Columns

Worksheet Name: Revenue percentage per region

Worksheet was used in the following Dashboards
- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter 4 (generated)	Revenue percentage per region	Revenue per month, Revenue per state, Revenue per age, Quantity-Discount Correlation, Revenue per category & Gender, Revenue percentage per region, Total Revenue	on-select	All
Highlight 1 (generated)	Revenue percentage per region	Revenue percentage per regi	on-select	Selected (Region)

Marks

Mark Class: Pie

Object(s) Used	Mark Type
Region	Color
Sum (Total)	wedge-Size
Sum (Total)	Size
Sum (Total)	Label
Region	Label

Calculated Fields Used

Field Name	Formula
Zero	0

Columns & Rows in Worksheet

Field Name	Column/Row
Sum (Zero)	Rows
Sum (Zero)	Rows

Worksheet Name: Total Revenue

Worksheet was used in the following Dashboards

- Dashboard 1

Data Sources

Data Source alias	Data Source type	Source	Joins
sales_06_FY2020-21 copy	Extract	textscan	None

Filters

Field Name	Field Selection	Selected Field Value(s)	Field Wildcard	Field Condition	Field Limit	Context Filter
Action (Region)	Use all		All	None	None	No

Marks

Mark Class: Automatic

Object(s) Used	Mark Type
Sum (Total)	Label