

Sales Performance Analysis

Domain:-
ECommerce

Report To,
Mr. Mike Goodman
Product Management
Retail Products

Product Report
Prepared By:
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Dated: 14th March 2022

FINAL VIEW

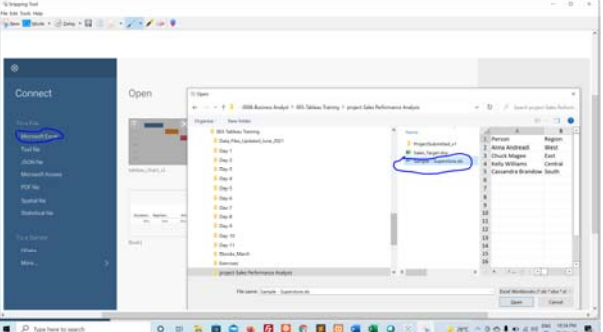
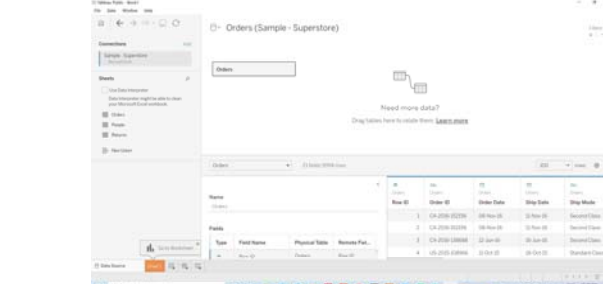


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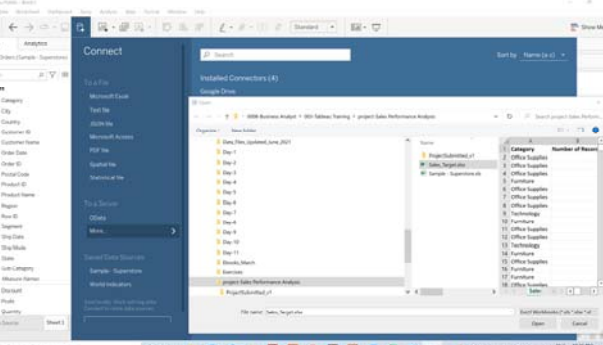
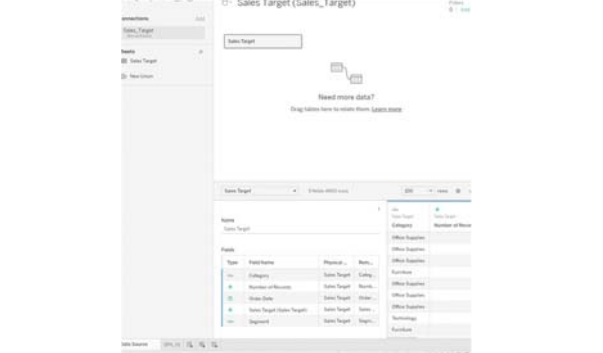
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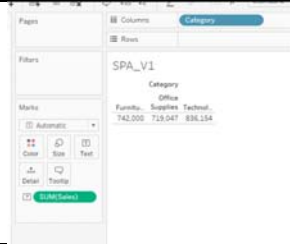
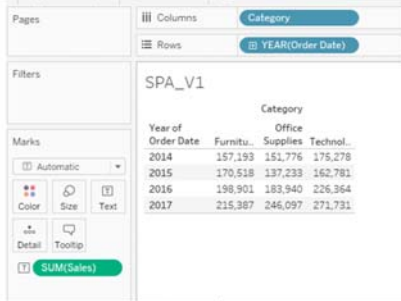
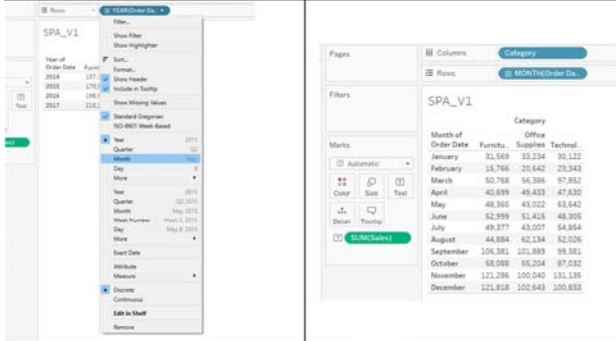
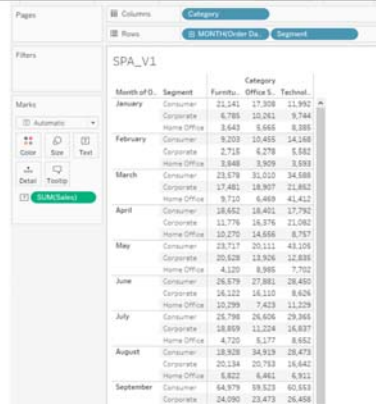

Working Methodology

1. Use the Saved Sample – Superstore dataset

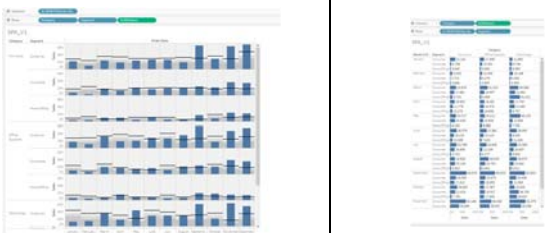


1.01	Open Tableau → Open Microsoft Excel from Connect Menu → Sample Superstore file	
1.02	Select → Order Table from Data Sheet → Drag and Drop	

2. Create a bullet chart with Category and Segment dimensions and Sales measures.

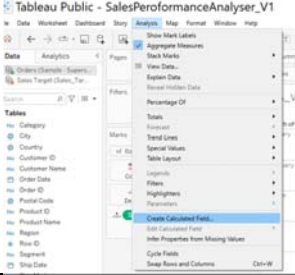

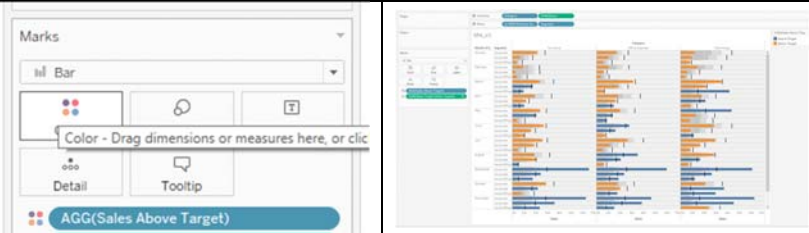
2.01	Go to Sheet 1 → Collect Other Data File Sales Target by Clicking Connect	
2.02		 <p style="text-align: center;">→ Connect the Target Sales File</p>

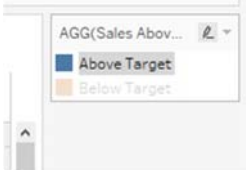
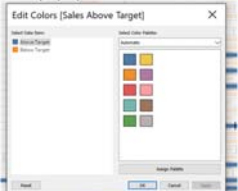

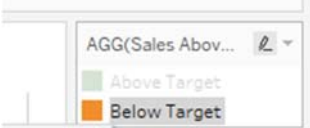
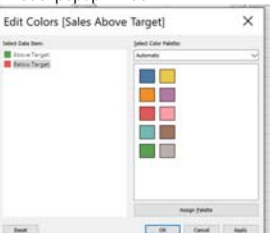

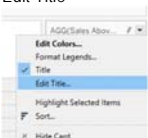
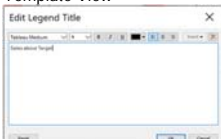
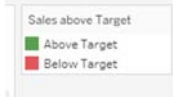
2.03	→ Go to Project Sheet → Select Category (Drag and Drop in Column Shelf)	
2.04	→ Go to Project Sheet → Select Order Date (Drag and Drop in Row Shelf)	
2.05	Click on the drop Down More Menu Icon on Order Date and Change it to Month View	
2.06	→ Go to Project Sheet → Select Segment (Drag and Drop in Row Shelf after the Order Date Item)	
2.07	→ Go to Project Sheet → Select Sales (Drag and Drop in Column Shelf next to Category)	

3. Blend the data with the Saved Sample - Sales Target data set to bring in the Sales Target measure.




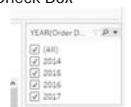
3.01	Change to Bullet chart with Target Sales → Target Sales → Select Bullet Graph from Show Me Pane	
3.02	Re arrange the view to suit the requirements	
3.03	Swap the View by pressing Ctrl + W (Shortcut Key)	
3.04	Move the Segment Field from Column Shelf to Row Shelf and place it next to Order Date	

4. Color code the chart to identify Categories and Segments that are above or below target.

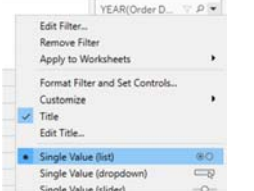

4.01	To achieve the color scheme as per the template, need to create the condition using Create Calculated Field from Analysis Menu	
4.02	Add the below condition and Name it as 'Sales Above Target' and Apply and Close the model window IF SUM([Sales]) > SUM([Sales Target (Sales_Target)] [Sales Target (Sales_Target)]) THEN "Above Target" ELSE "Below Target" END	
4.03	Apply Color Scheme based on the Above Profit and Below Profit Profile → Drag the 'Sales Above Target' field to Color Field Name in the 'Color' Marks Card Pane	

4.04	Change the Color to 'Green' if the sales are above the target	<p>Double Click on the Above Target to Change it Green</p> 	<p>Select the Green Color and Press Apply, Press Ok to close the model popup window</p> 
		<p>Result on the worksheet</p> 	
4.05	Change the Color to 'Red' if the sales are below the target	<p>Double Click on the Above Target to Change it Green</p> 	<p>Select the Green Color and Press Apply, Press Ok to close the model popup window</p> 
		<p>Result on the worksheet</p> 	
4.06	Change the Title of the Legend	<p>Select the Drop Down Icon from the Sales Target Legend and Select Edit Title</p> 	<p>Rename the Title to Suite the Template View</p>  <p>The Final Template</p> 

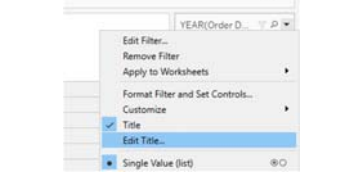
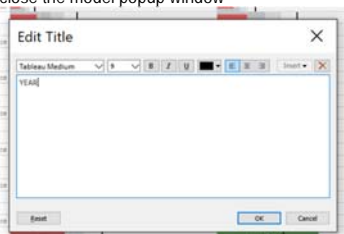

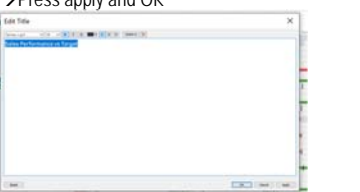


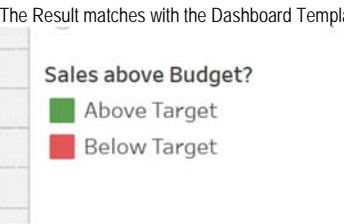
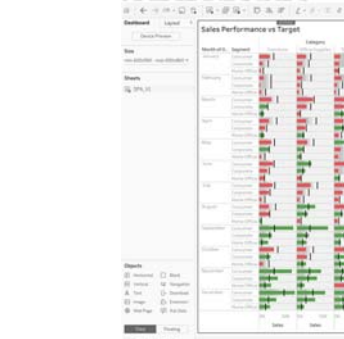
5. Add the year of sales to the view to identify trends and outliers.

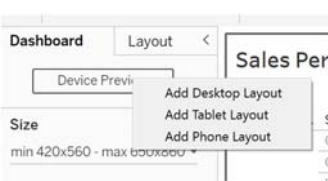
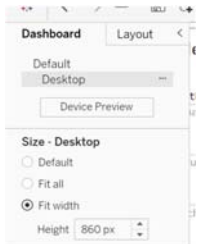
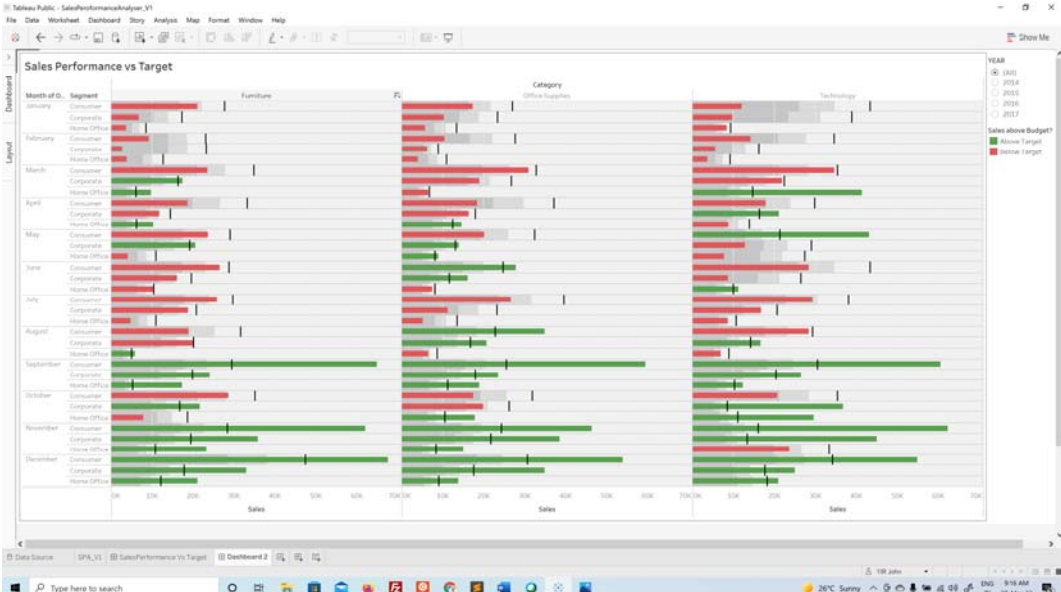
5.01	Select the Order Date from the Data Panel and drop in Filter Card Pane	<p>Select the Year and Select Next Button</p> 	<p>→ Select the Radio Button 'Select from the List'</p> <p>→ Select 'All' Button</p> <p>→ Press Apply and Ok Button to complete the activity</p> 	<p>→ Ensure the Display the filter in the Legend Pane</p> 	<p>You will have Multiple Select Check Box</p> 
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6. Add a filter so that the user can select one, more than one, or all years.

6.01	<p>To Change it to Radio Button → Select the Drop Down Menu Next Year (Order Date) form the Legent Pane → Change to Single Value (List)</p>		
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7. Create a dashboard with this view.

7.01	<p>Now Change the Title to 'YEAR'</p>	<p>Select Edit Title from the Drop Down Menu of Year Legent Pane as shown in this figure</p> 	<p>Change the Title to 'YEAR' and pre ok button to close the model popup window</p> 	<p>Now the title result is changed to 'YEAR'</p> 
7.02	<p>Change the Sheet Title to 'Sales Performance vs Target'</p>	<p>Double Click on the Title Name form the Sheet → Rename the Title in the Addinial Modal window popped up → Press apply and OK</p> 	<p>The result will be</p> 	
7.03	<p>Change the Sales Target Title to 'Sales above Budget'</p>	<p>Click on the Drop Down Menu Next to the Sales above Target Menu → Select Edit Legend Title → Change to Sales Above Budget? → Press Ok Button to complete the change</p> 	<p>The Result matches with the Dashboard Template</p> 	
7.04	<p>To Create a Dashboard View</p>	<p>→ Click on Dashboard form the Main Menu → Select New Dash Boards → Double Click and rename the Dashboard Sheet name if require only → Drag and Drop the Sheet from Dashbaord Pane List to Dashboard View area</p>		

7.05	<p>→ Right Click on the Dashboard Device Preview Area</p> <p>→ Select the Add Desktop Layout</p> 	<p>→ Select Fit to Width</p> 
7.08	<p>FINAL RESULT</p> 	
7.09	Save the Document and Share the link	https://public.tableau.com/app/profile/yir.john/viz/SalesPerformanceAnalysr_V1/Dashboard2?publish=yes

Thank you