

# UNDERSTANDING THE DASHBOARD CREATION IN TABLEAU

GOOGLE SLIDES PRESENTATION

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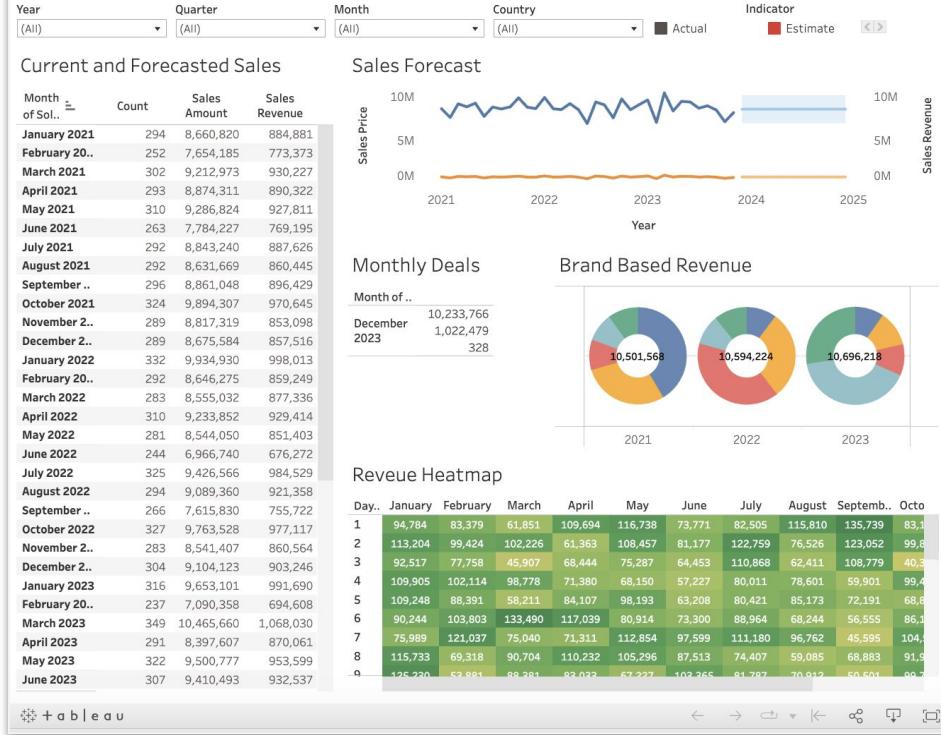
# Multi-Tab Navigation

Tab for Sales & Forecast Dashboard

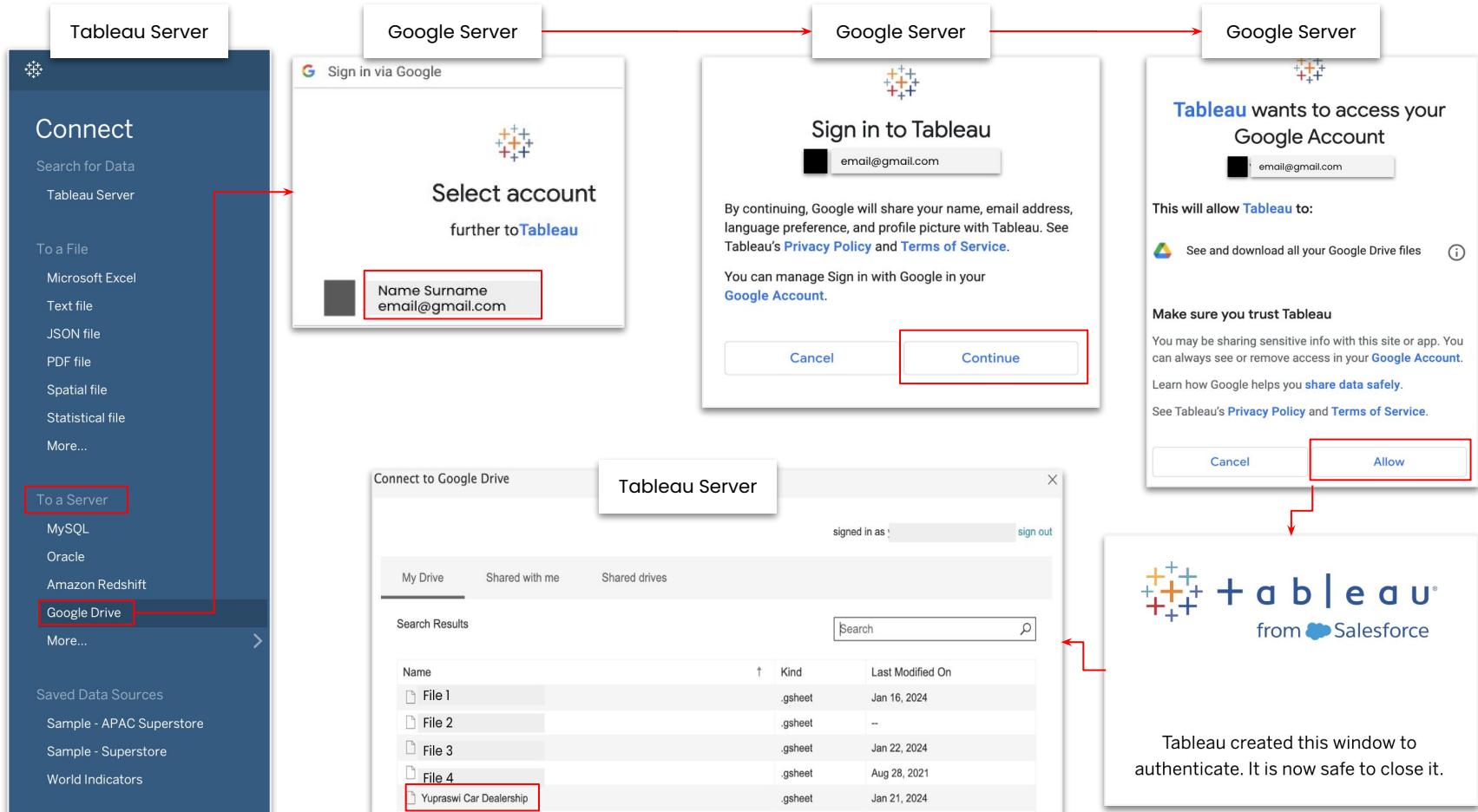
Tab for Top Deals Dashboard

Tab for Sales Pipeline Dashboard

## Sales & Forecast Dashboard



# LIVE DATA CONNECTION



Refresh Button

Connection Type

Tableau - Book1

Sales Data (Yupraswi Car Dealership)

Connections Add

Yupraswi Car Dealership Microsoft Excel (Google Drive)

Sheets

Use Data Interpreter Data Interpreter might be able to clean your Microsoft Excel (Google Drive) workbook.

Sales Data

New Union

New Table Extension

Sales Data 7 fields 10580 rows

Name Sales Data

Fields

Type	Field Name	Physical Table	Remote
Sold Date	Sold Date	Sales Data	Sold Da
Abc	Sales Location	Sales Data	Sales Lc
Abc	Car	Sales Data	Car

Go to Worksheet

Data Source Sheet 1

Connection

Live Extract

Filters 0 | Add

Need more data?

Drag tables here to relate them. [Learn more](#)

**Value before Update**

	January 2023	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023	August 2023
No. of Cars Sold	239	175	206	225	9	83	148	157
Sales	7,009,272	5,375,731	6,302,009	6,650,656	330,434	2,652,124	4,635,284	4,693,583
Revenue	701,362	552,050	618,805	687,598	37,539	274,501	463,054	480,906

**Value after Update**

	January 2023	February 2023	March 2023	April 2023	May 2023	June 2023	July 2023	August 2023
No. of Cars Sold	316	237	349	291	322	307	288	291
Sales	9,653,101	7,090,358	10,465,660	8,397,607	9,500,777	9,410,493	8,715,440	8,988,422
Revenue	991,690	694,608	1,068,030	870,061	953,599	932,537	863,017	904,468

# CONTINUOUS VS DISCRETE DATA

**1. Drag Sold Date in Rows**

**2. Click on the Dropdown of Sold Date**

**The Label Field**

**3. Select Discrete**

**4. Add required Measure Values in Label of Marks Card**

**View of Monthly Deals After Selection**

Month of Sold Date	Count	Sales Amount	Sales Revenue
January 2021	294	8,660,820	884,881
February 20..	252	7,654,185	773,373
March 2021	302	9,212,973	930,227
April 2021	293	8,874,311	890,322
May 2021	310	9,286,824	927,811
June 2021	263	7,784,227	769,195
July 2021	292	8,843,240	887,626
August 2021	292	8,631,669	860,445
September ..	296	8,861,048	896,429
October 2021	324	9,894,307	970,645
November 2..	289	8,817,319	853,098
December 2..	289	8,675,584	857,516
January 2022	332	9,934,930	998,013
February 20..	292	8,646,275	859,249
March 2022	283	8,555,032	877,336
April 2022	310	9,233,852	929,414
May 2022	281	8,544,050	851,403
June 2022	244	6,966,740	676,272
July 2022	325	9,426,566	984,529
August 2022	294	9,089,360	921,358
September ..	266	7,615,830	755,722
October 2022	327	9,763,528	977,117

# CALCULATED FIELD

The screenshot illustrates the steps to create a calculated field in Tableau:

1. Drag Sold Date in Rows and Convert into Discrete Data
2. Click Analysis Tab on the Toolbar
3. Click on Calculated Field
4. Rename the Calculated Field
5. Input Formula
6. Click on Apply
7. Click on OK

**Table Data:**

Month of Sold ..	Value
January 2021	8.660.820
February 2021	7.654.185
March 2021	9.212.973
April 2021	8.874.311
May 2021	9.286.824
June 2021	7.784.227
July 2021	8.843.240
August 2021	8.631.669
September 2021	8.861.048
October 2021	9.894.307
November 2021	8.817.319
December 2021	8.675.584
January 2022	9.934.930
February 2022	8.646.275
March 2022	8.555.032
April 2022	9.233.852
May 2022	8.544.050
June 2022	6.966.740
July 2022	9.426.566
August 2022	9.089.360
September 2022	7.615.830
October 2022	9.763.528
November 2022	8.541.407
December 2022	9.104.123
January 2023	9.653.101
February 2023	7.090.358
March 2023	10.465.660

# CURRENT MONTH

The screenshot illustrates the process of creating a calculated field filter in Tableau and applying it to a dashboard.

**Left Panel (Data View):**

- Shows the Tableau interface with "QuickTime Player" as the host application.
- The "Tables" shelf includes fields: Car, Model, Monthly Deals, Production Year, Sales Location, Sold Date, Measure Names, Commission Earned, Sale Price, Sheet1 (Count), and Measure Values.
- A calculated field, `SUM(Sale Price)`, is selected and highlighted with a red box.
- The "Filters" button is highlighted with a red box.

**Middle Panel (Filter Dialog):**

- The "Filter [Monthly Deals]" dialog is open.
- The "General" tab is selected.
- The condition `True` is checked.
- Instructions: "1. Drag the Generated Calculated Field into Filters Bar" and "2. Click True on Filter Display".
- Buttons: "Reset", "Apply" (highlighted with a red box), "Cancel", and "OK" (highlighted with a red box).
- Summary details:
  - Field: [Monthly Deals]
  - Selection: Selected 1 of 2 values
  - Wildcard: All
  - Condition: None
  - Limit: None

**Right Panel (Dashboard View):**

- The dashboard shows a card titled "Monthly Deals" with data for December 2023.
- The card displays:
  - Month of S..: December 2023
  - Revenue: 10,233,766
  - No. of Cars Sold: 1,022,479
  - Sales: 328
- A tooltip is shown for the December 2023 card, listing:
  - Month of Sold Date: December 2023
  - No. of Cars Sold: 328
  - Revenue: 1,022,479
  - Sales: 10,233,766
- Instructions: "3. Click on Apply" and "3. Click on OK" are placed below the "OK" button in the filter dialog.
- Instruction 4: "4. The dataset will be generated, and details can be accessed by hovering the cursor." is placed near the tooltip.

# SALES FORECASTING

**1. Right Click on the Dataset and Click on Forecast**

**2. Click on Show Forecast**

**3. Right Click on Generated Dataset and Click on Format**

**4. Select Visually Appealing Color, Alignment, Font, Shading and Other Formatting Features**

**5. Rename the Title**

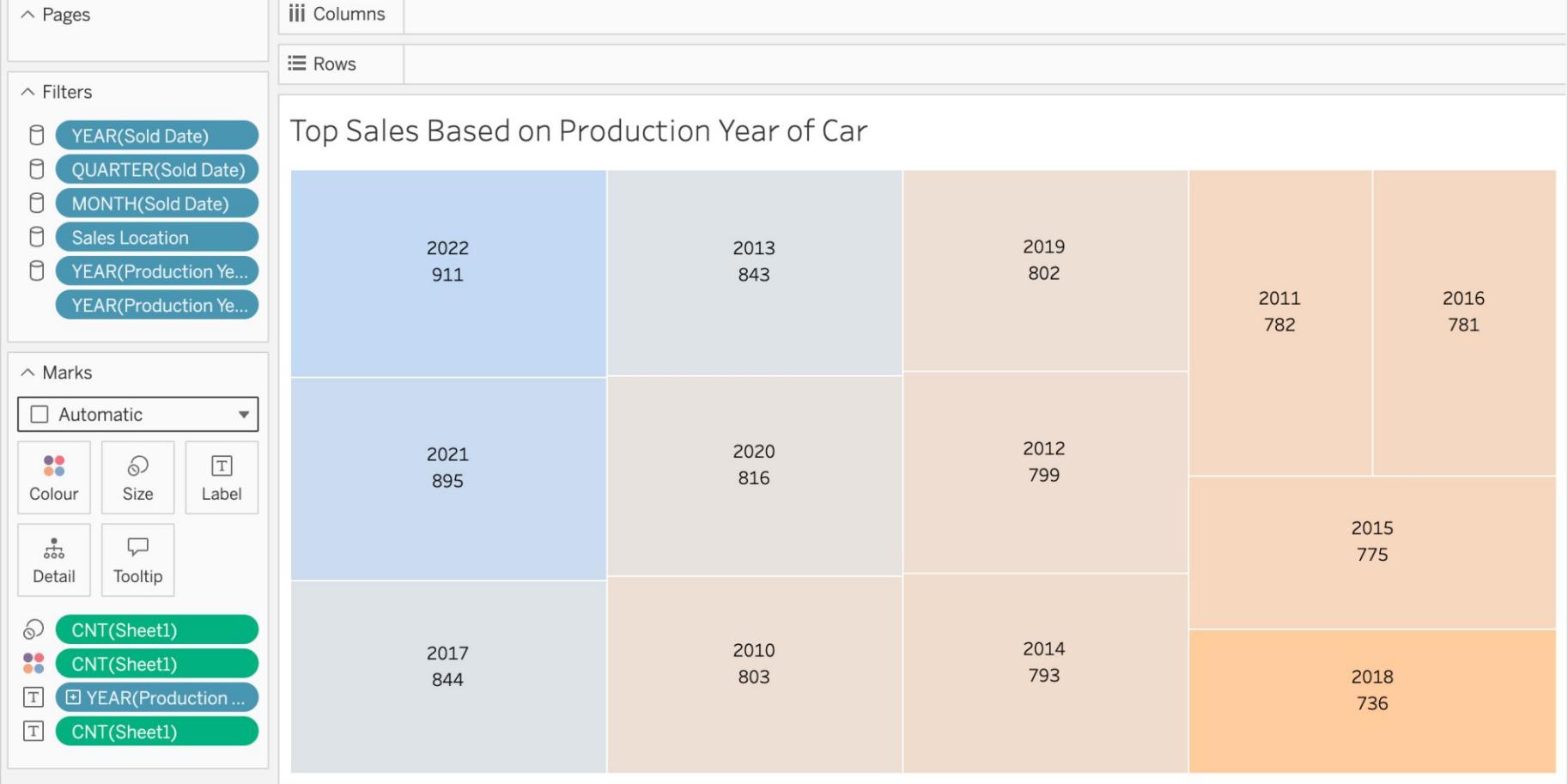
**Current and Forecasted Sales**

Month of Sold Date	Count	Sales Amount	Sales Revenue
May 2022	281	8,544,050	851,403
June 2022	244	6,966,740	676,272
July 2022	325	9,426,566	984,529
August 2022	294	9,089,360	921,358
September ..	266	7,615,830	755,722
October 2022	327	9,763,528	977,117
November 2..	283	8,541,407	860,564
December 2..	304	9,104,123	903,246
January 2023	316	9,653,101	991,690
February 20..	237	7,090,358	694,608
March 2023	349	10,465,660	1,068,030
April 2023	291	8,397,607	870,061
May 2023	322	9,500,777	953,599
June 2023	307	9,410,493	932,537
July 2023	288	8,715,440	863,017
August 2023	291	8,988,422	904,468
September 2023	291	8,499,767	848,761
October 2023	241	7,169,933	724,632
November 2023	282	8,212,549	822,335
December 2023	298	8,901,682	869,701
January 2024	298	8,901,682	869,701
February 2024	298	8,901,682	869,701
March 2024	298	8,901,682	869,701
April 2024	298	8,901,682	869,701
May 2024	291	8,600,572	869,701

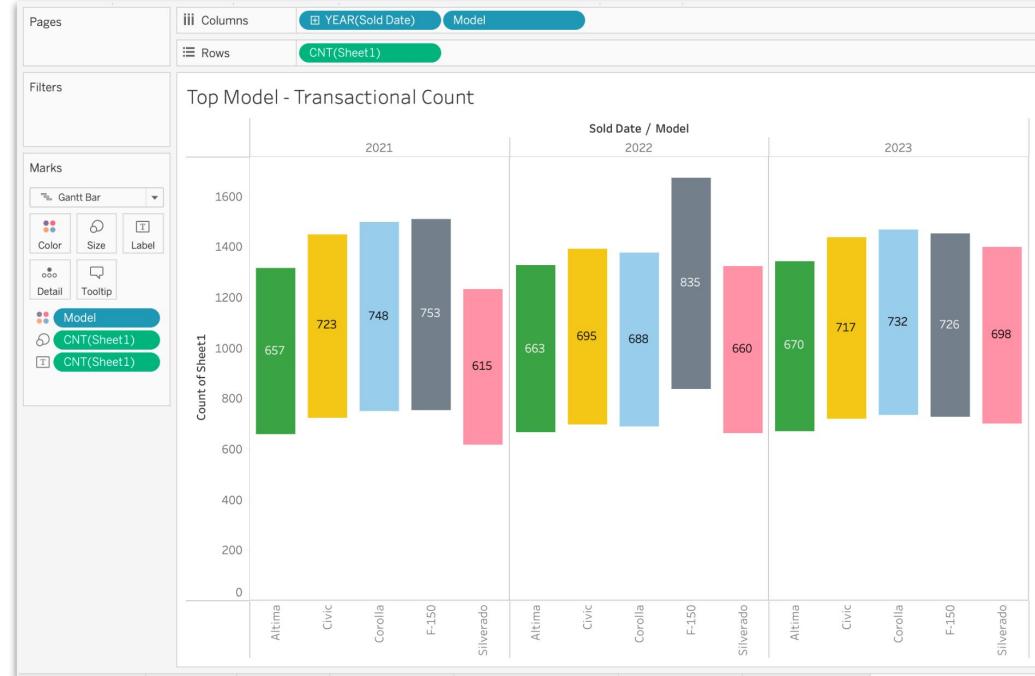
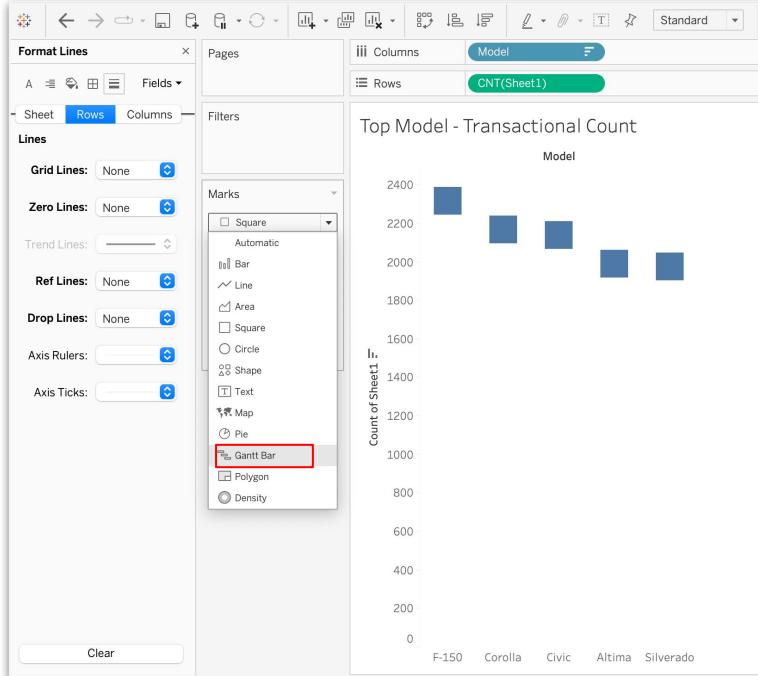
Forecast indicator: Estimate  
Month of Sold Date: December 2023  
Count: 291

View while Hovering the Cursor

# TREE MAP



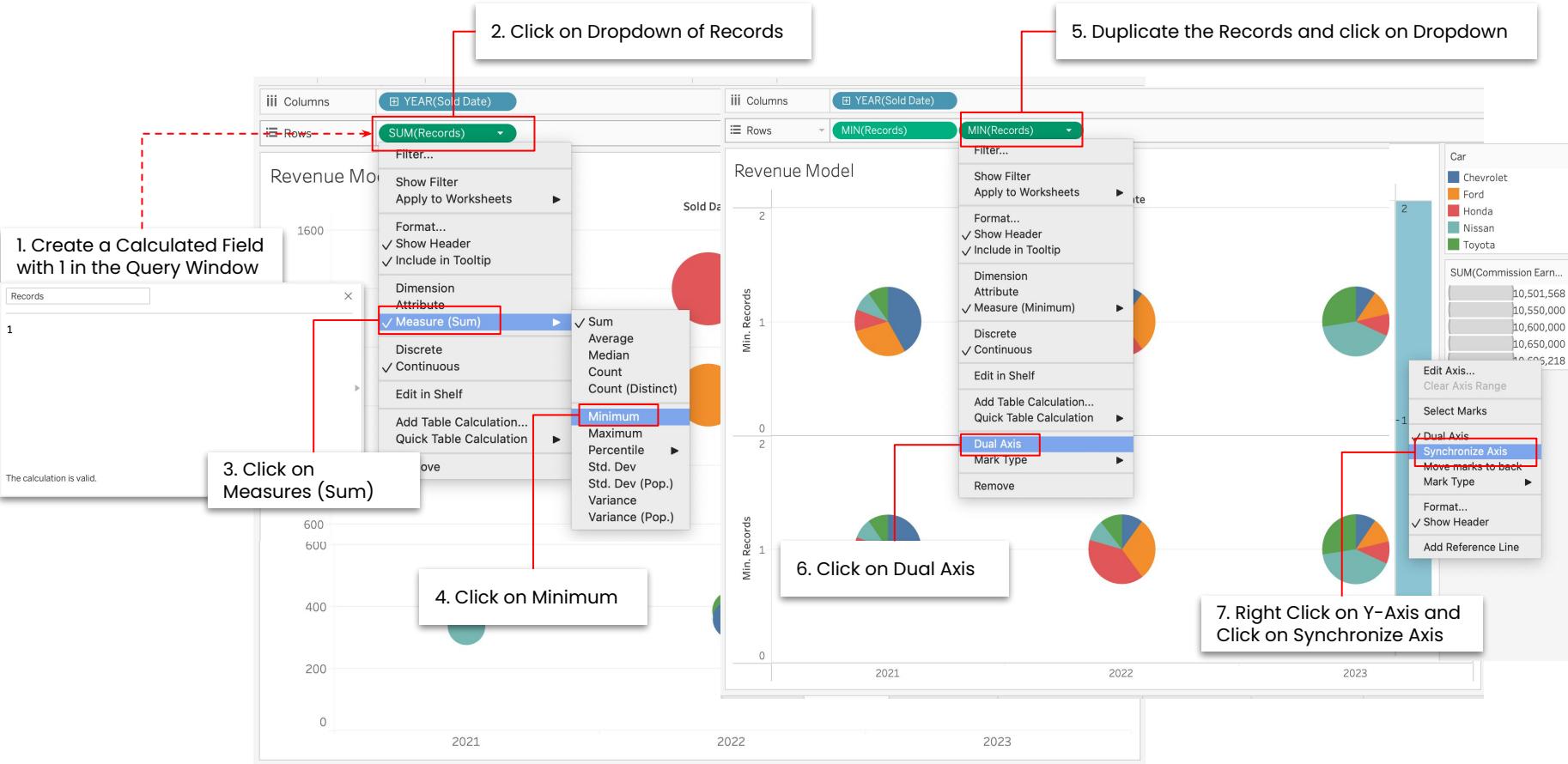
# WATERFALL CHART

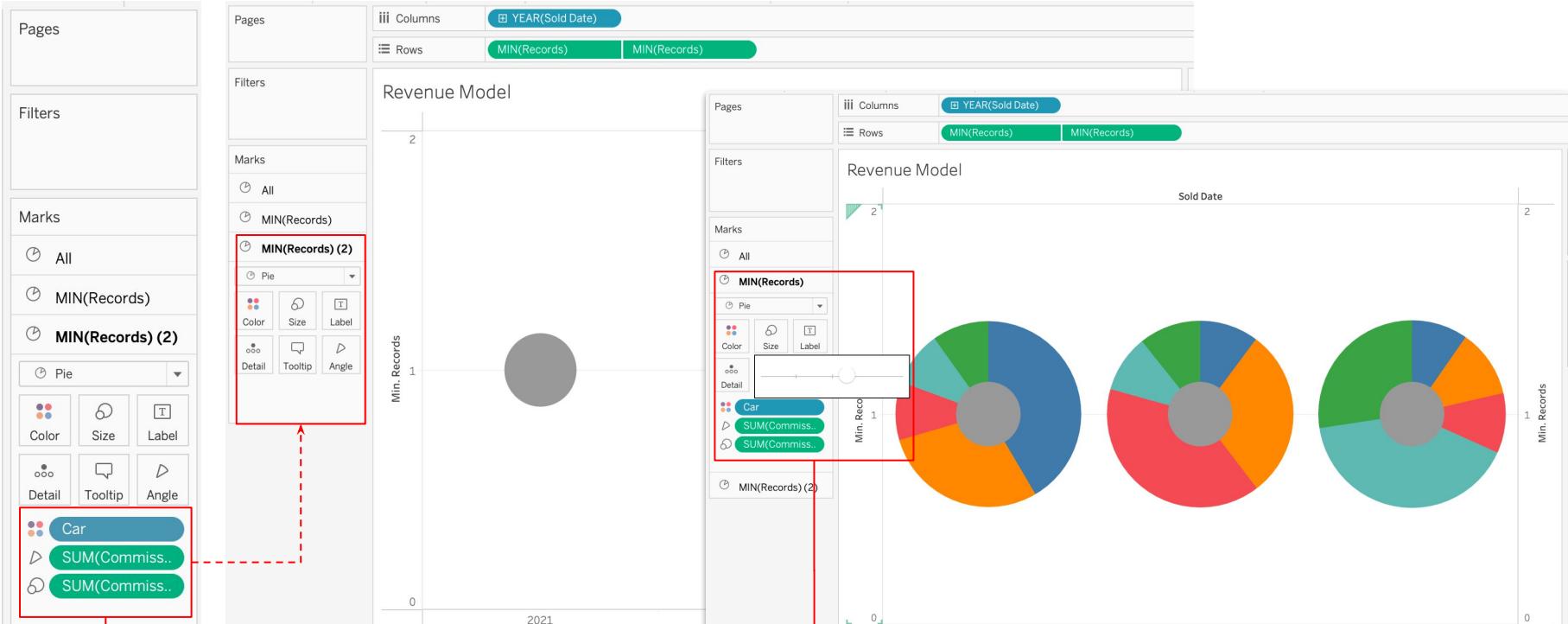


# HEAT MAP



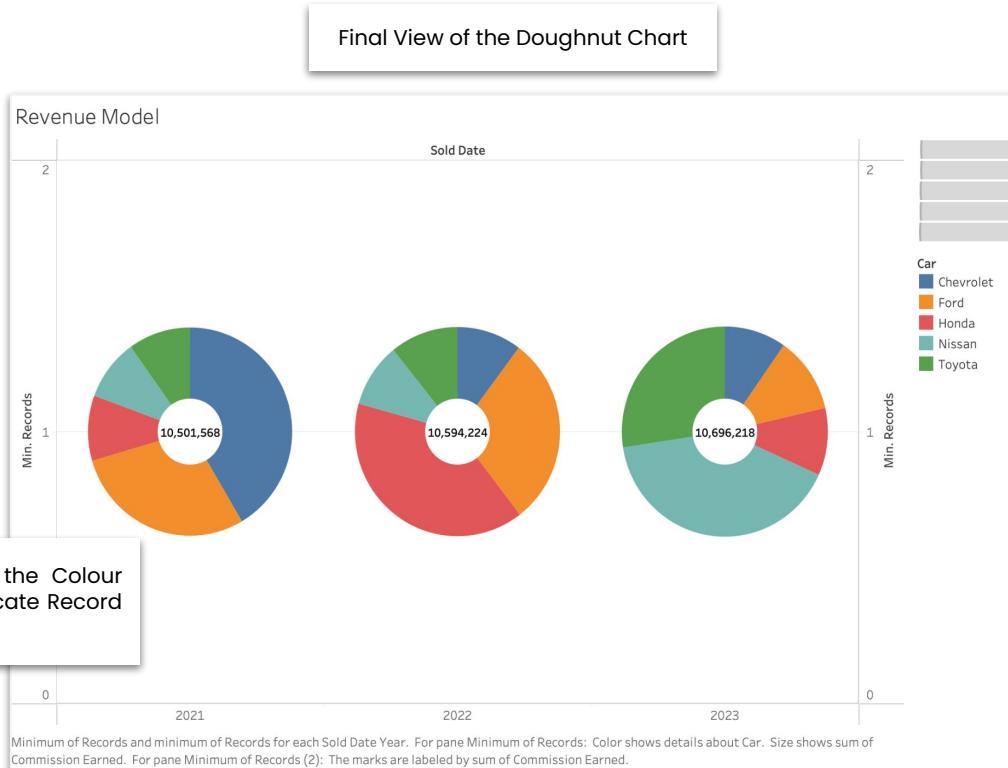
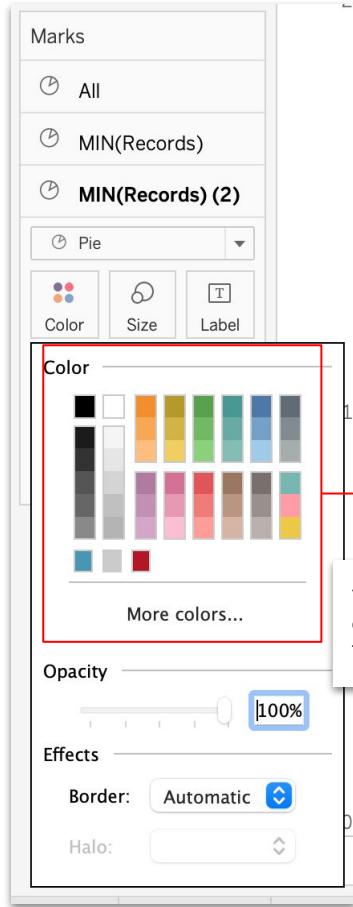
# DOUGHNUT CHART





8. Remove all the Parameters from duplicated Record

9. Go to Original Record and Increase the Size of the Circle

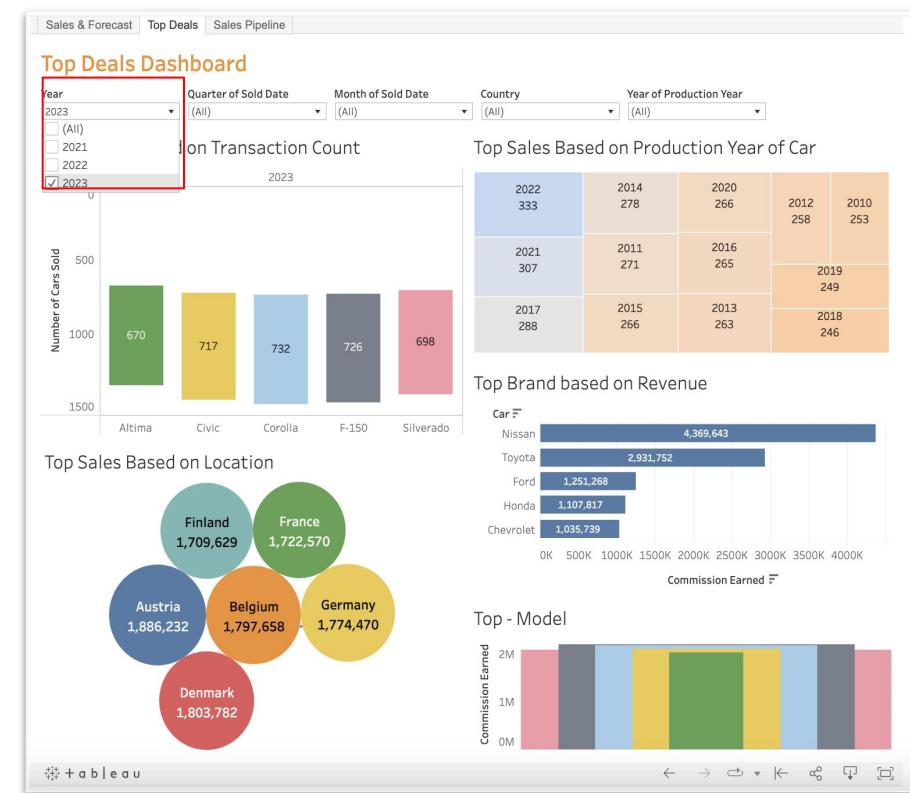
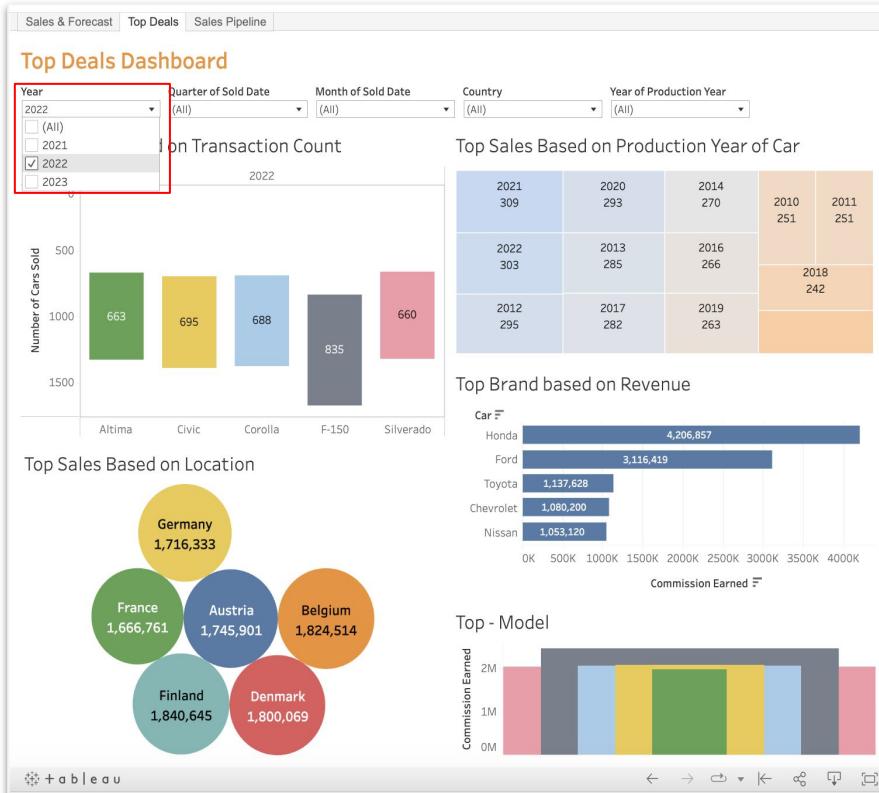


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# OUTCOME

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# AN INTERACTIVE DASHBOARD



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**THANK YOU!**

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