Comparison of Region Based on Sales .

Course-end Project 2

Description

The director of a leading organization wants to compare the sales between two regions. He has asked each region operators to record the sales data to compare by region. The upper management wants to visualize the sales data using a dashboard to understand the performance between them and suggest the necessary improvements.

Objective:

Help the organization by creating a dashboard to visualize the sales comparison between two selected regions.

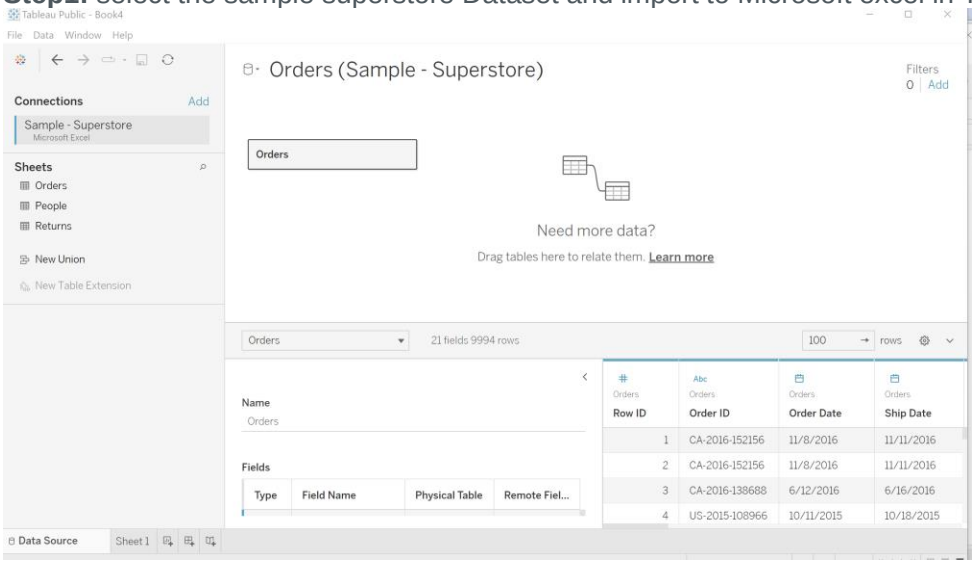
Datasets:

Sample Superstore

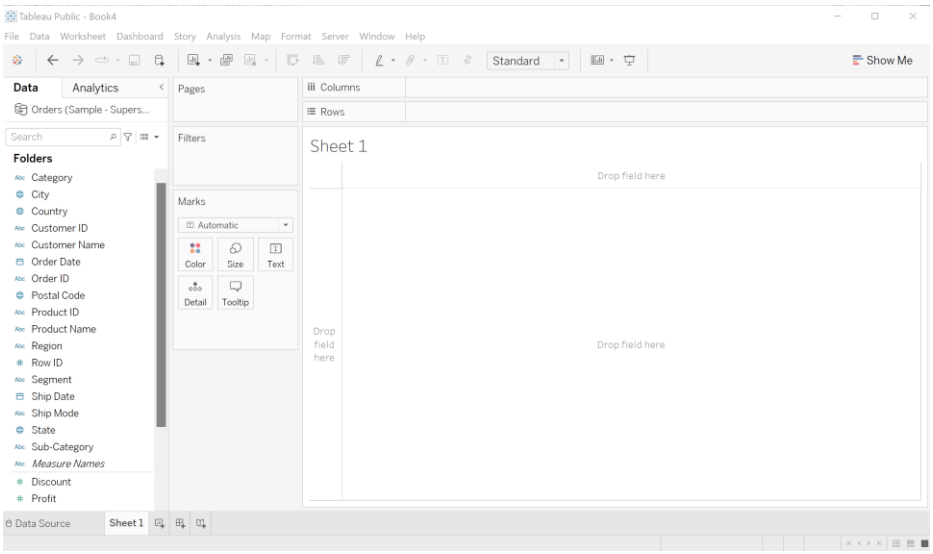
Steps to Perform:

1. Select Sample Superstore as Dataset
   - Use Sample Superstore Dataset
   - Select Data
   - Use Group by from Data Source Table on a Folder to create a folder to segregate the required data

Step1: select the sample superstore Dataset and import to Microsoft excel in Tableau.

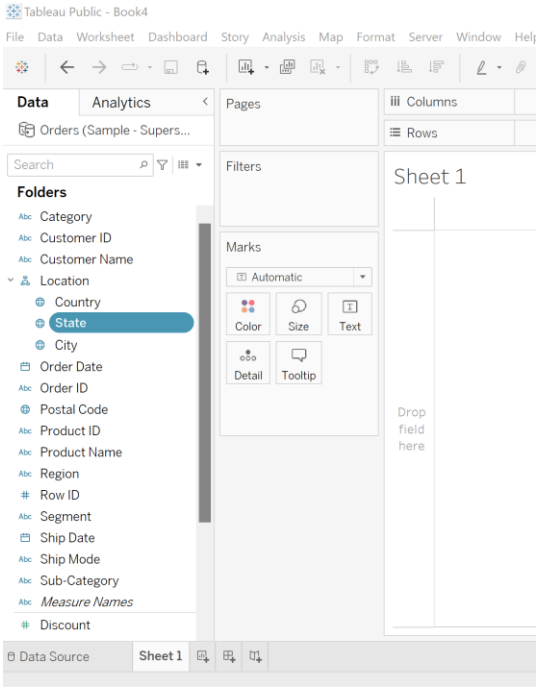


Step 2: In the Data Source Tab use the Group By feature to create a folder that segregates the data required for the analysis. Group the data based on region.



2. Create a hierarchy called Location

Step3: Create the hierarchy called “Location” using right click on country folder and create hierarchy then drag city, state and postal code to the hierarchy range.

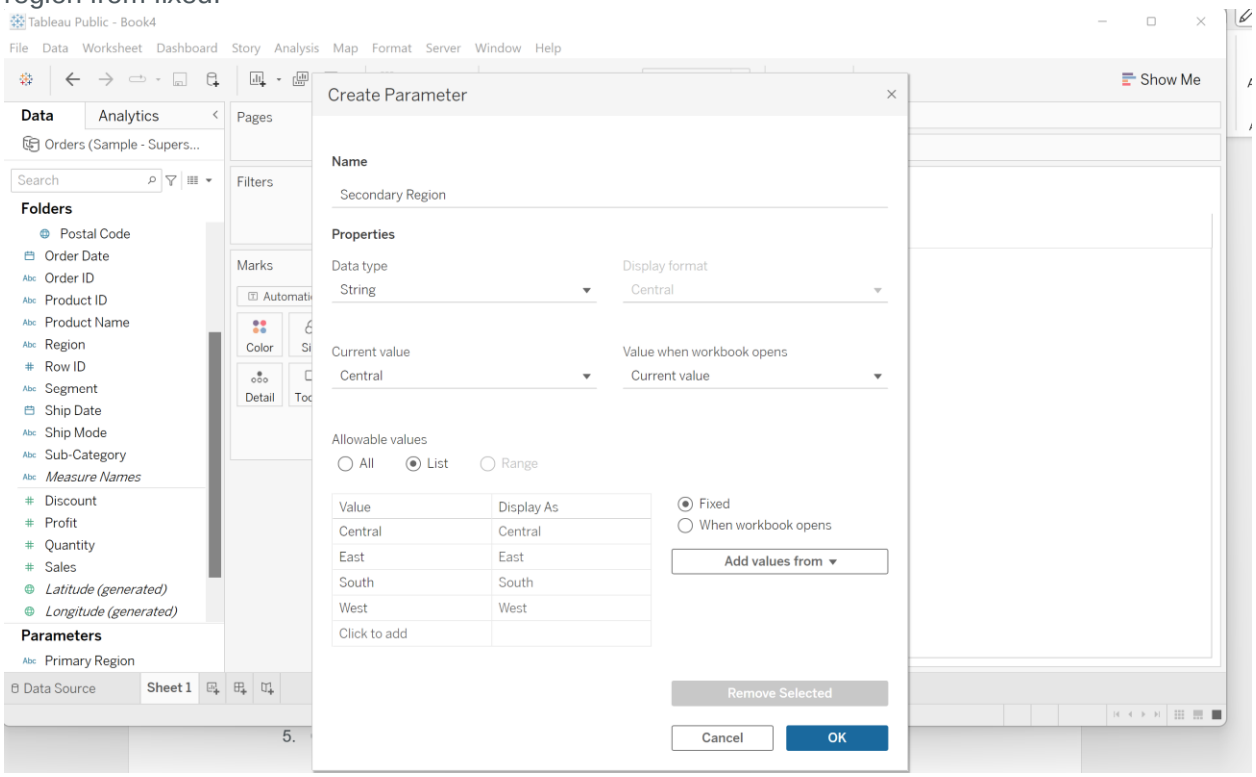


3. Create two parameters: Primary Region and Secondary Region with all regions listed in them.

- Create Parameters for Primary Region and Secondary Region
- Create a Calculated Field for both Primary Region and Secondary Region

Step4: Create the parameter by right clicking on the data pane and select create parameter.

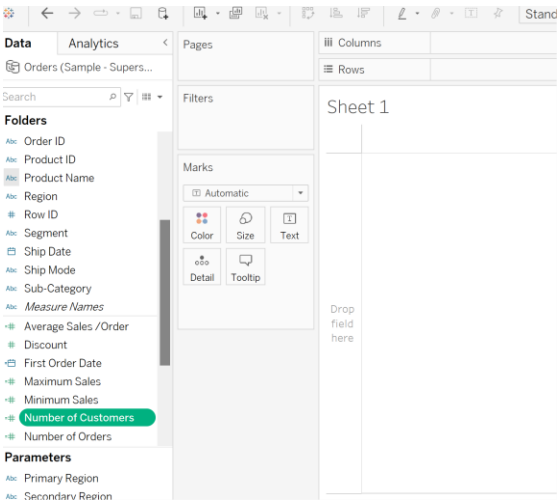
Here create two parameters called primary region and secondary region and select the region from fixed.



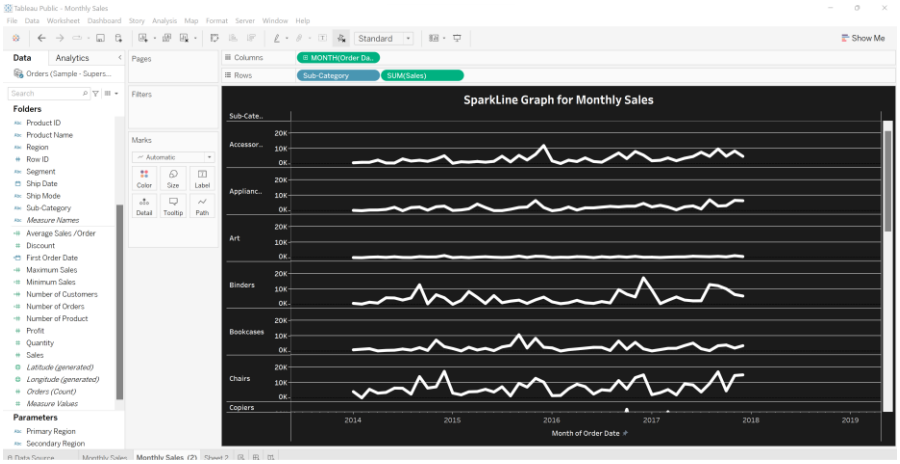
4. Create a First Order Date
   - Create a Calculated Field and name it as the First Order Date

STEP5: Creating the calculation field , click on analysis, select calculation filed and create calculation for the primary field and secondary field :

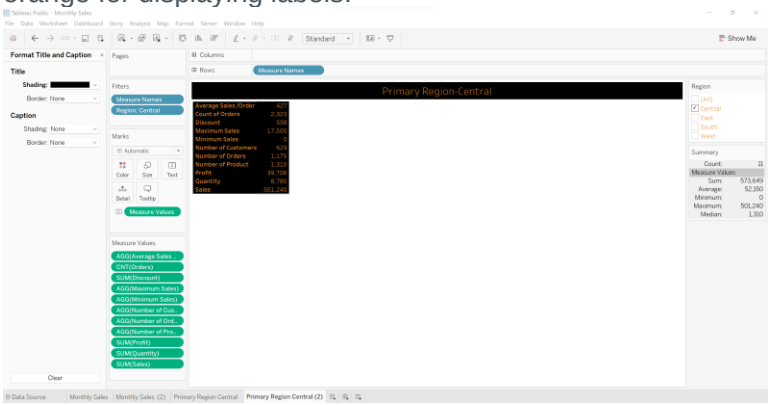
- AvgSales/Order= SUM([Sales])/COUNTD([Order ID])
- First Order Date= MIN([Order Date])
- Max Sales= MAX([Sales])
- Min Sales = MIN([Sales])
- No of Orders= COUNTD([Order ID])
- No of Product Sales = COUNTD([Product ID])
- No of Customers = COUNTD([Customer ID])



STEP6: Drag the order Date to columns and sub-category and Sales to Rows.
Right Click on the year order Date and click on Month to see the graph. Format the background sheet by right click on the sheet and change the background to black , broaden the lines. Click on the Mark and click on Automatic line.

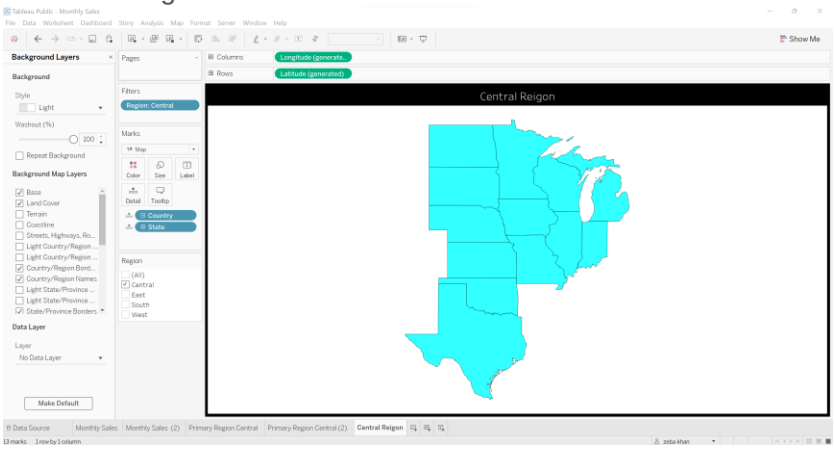


STEP7: Drag the measure Names to Rows and filter region. Drag the Region to filter and drag Measure values to text. Formatting details:
For heading right click and select format title shading black similarly,
Right click on the table select sheet pane and header black. Right click on the color mark sleect orange for displaying labels.

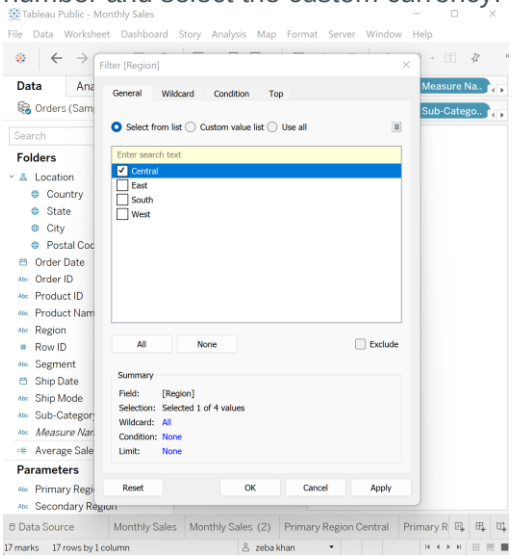


STEP8: drag the longitude to columns and latitude to rows.
Drag the region in filters and country, state to details. Format the

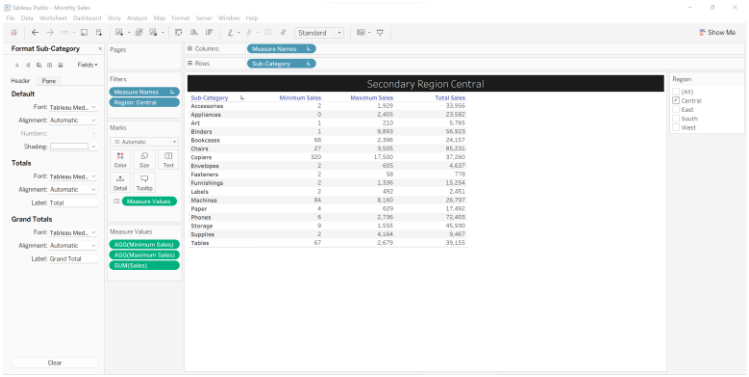
Map into teal colors. For wiping the map state name right click on the map select background layers and then drag on washout to 100%.

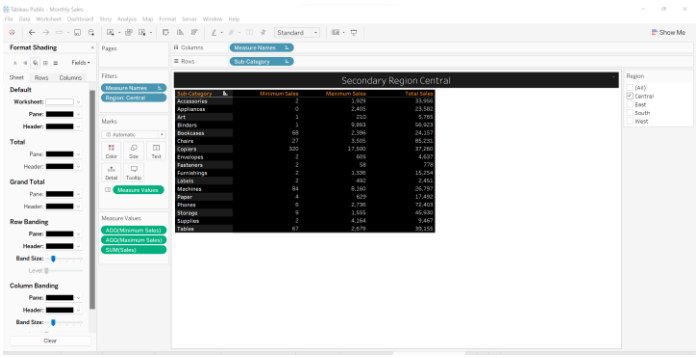


STEP9: Drag the measure names to filter and columns, region to filters and select central. Drag sub-Category to rows and measure values to text. Format the sheet to black background and label as white and heading as blue color. Change the number to current by right clicking on the number and select the custom currency.

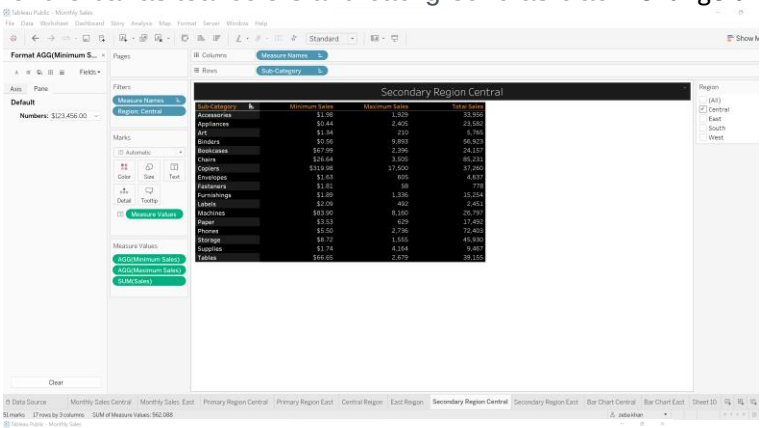


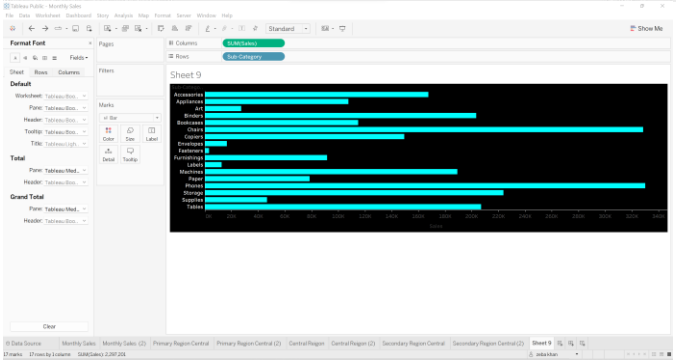
Right Click on the heading and select the color blue, right click on the sheet heading and click on format select the shading as black. Change the formatting of row banding, column banding to black for both Pane and header.





STEP10: Drag the sales to column, Sub-Category to rows and create a bar chart. Do the formatting for the bar as teal colors and background as black. Change the currency of the columns





To hide the header right click on the y axis and hide header.

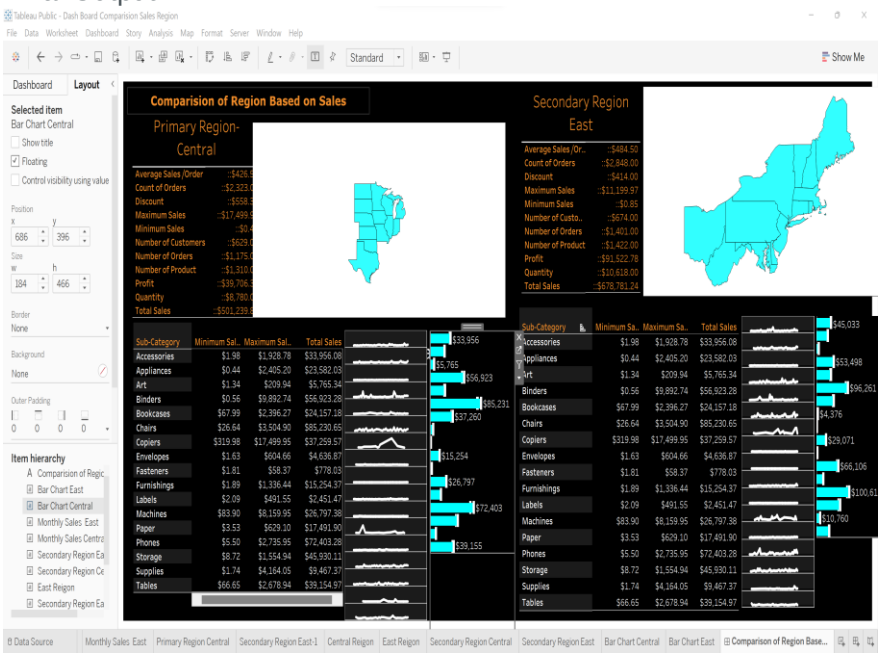
5. Create a dashboard
    - Align all sheets in the dashboard

STEP11: Select the new dashboard and drag horizontal axis to the sheet and then select the layout and change the background. Drag all primary region and secondary region to the dashboard.

6. Partition the dashboard to display the below details of Primary Region and Secondary Region
    - First Order Date
    - Total Sales
    - Average Sales per Order
    - No. of Customers
    - No. of Orders
    - No. of Products in Sale

STEP12: filter and format the dashboard

Final Output:



Sample Output: