Sales Performance Analysis Tableau Project

Step 1: Open **Tableau 10.x**

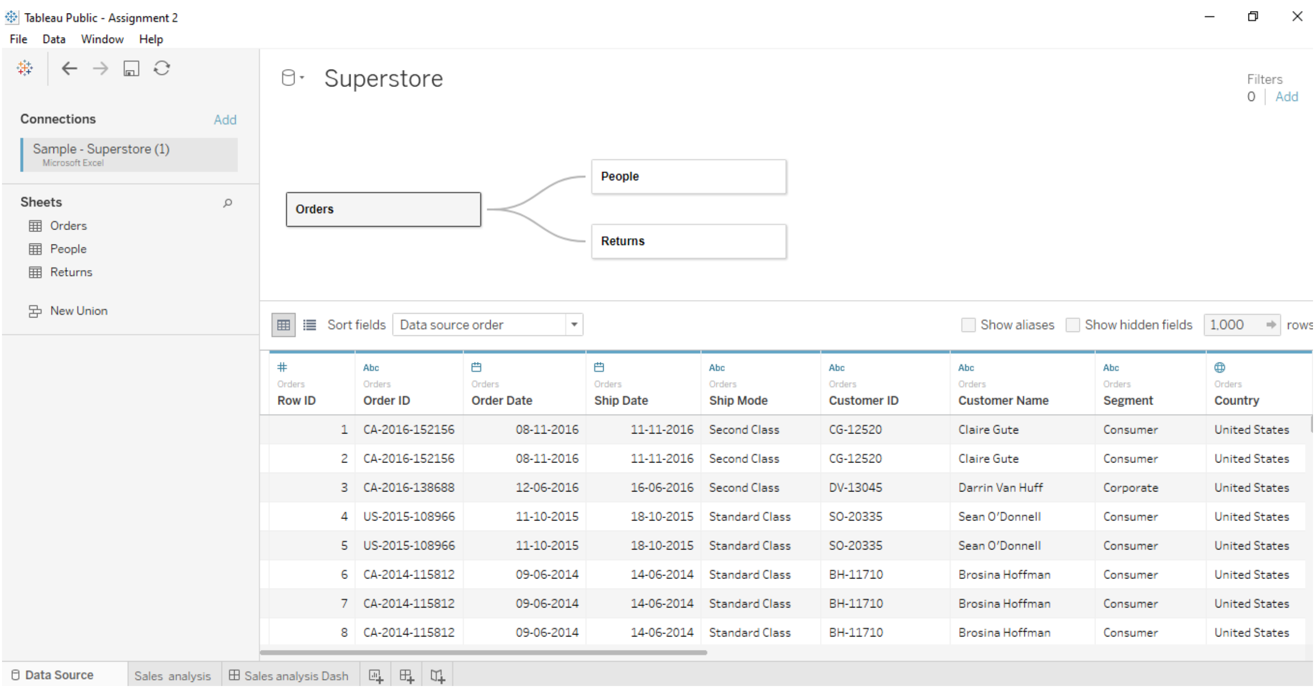
Step 2: On the home page, under **Connect,** under **to a file,** click **Excel.**

Step 3: Browse and connect to the **Sample - Superstore** Excel file.

Step 4: Drag and drop **Orders** tables to the canvas area.

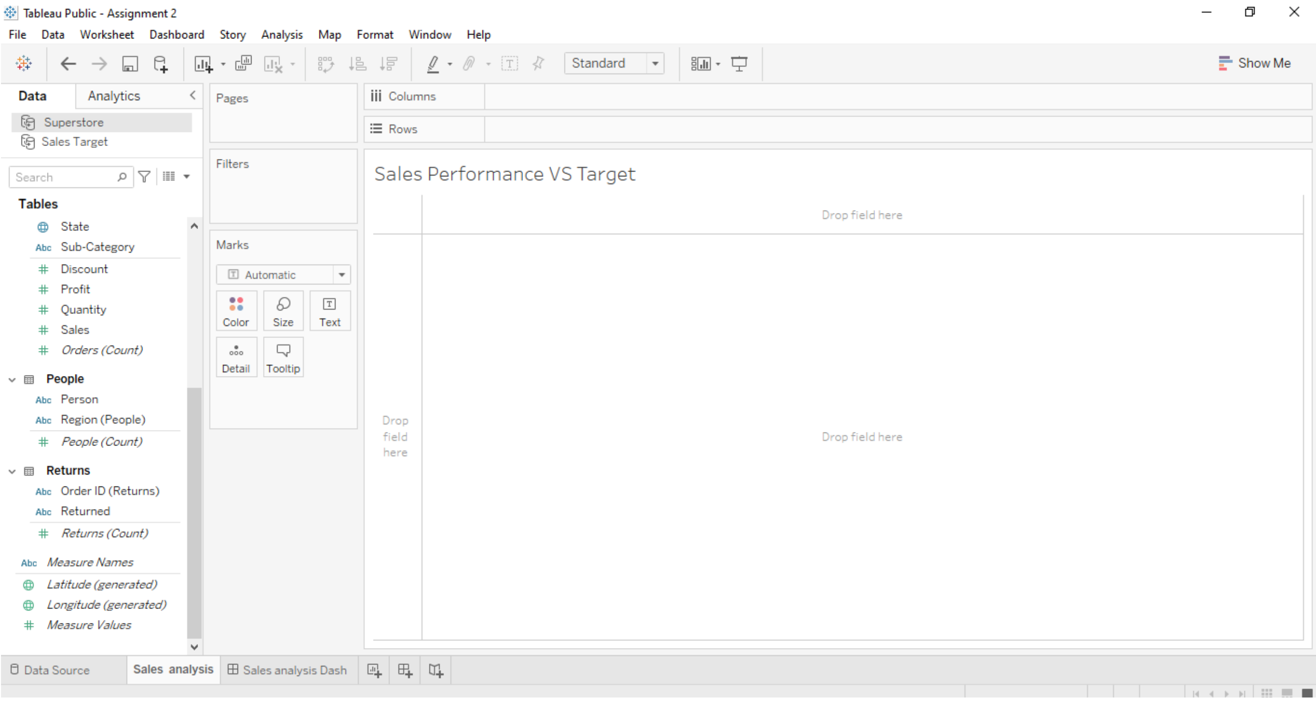
Step 5: Drag and drop **People** table in front of Orders table to create a connection.

Step 6: Drag and drop **Return** table in front of Orders table to create a connection.



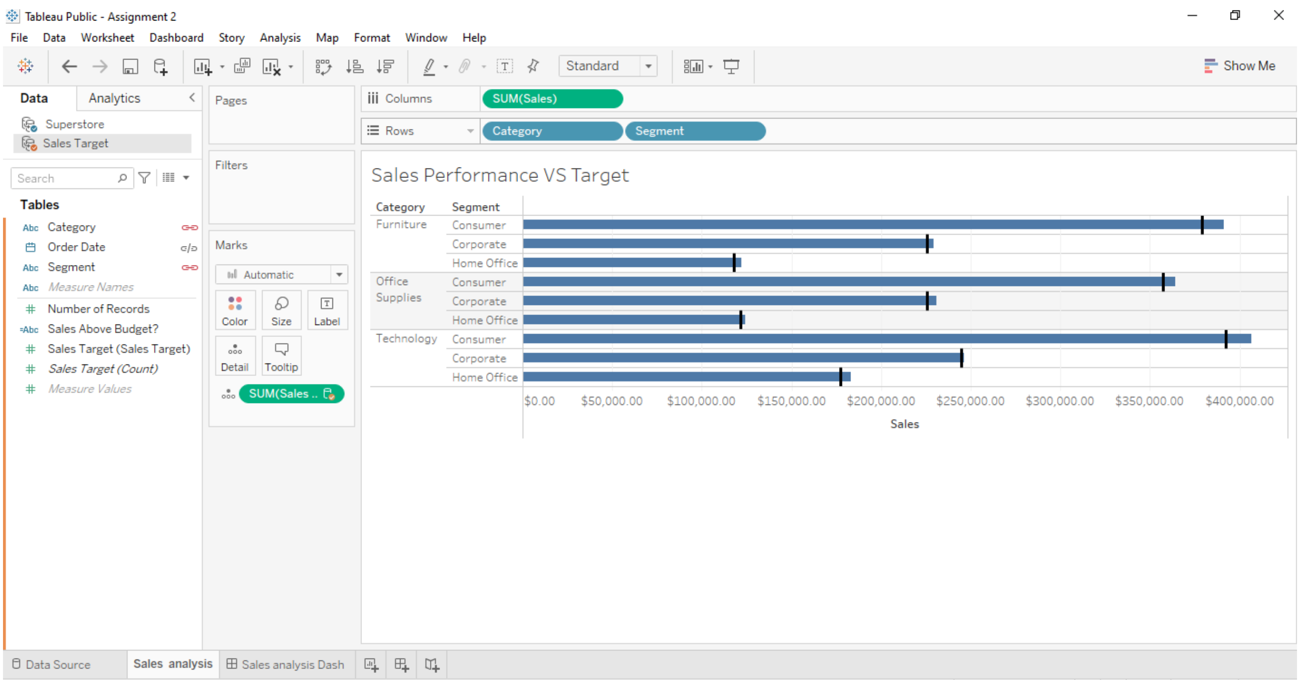
Step 7: To create a view, go to **Sheet 1** and rename it **Sales analysis**.

Step 8: To add another data source in **Sales analysis** sheet and click on new data source button and browse and select **Sales target** Excel File. (This is a part of Data Blending)

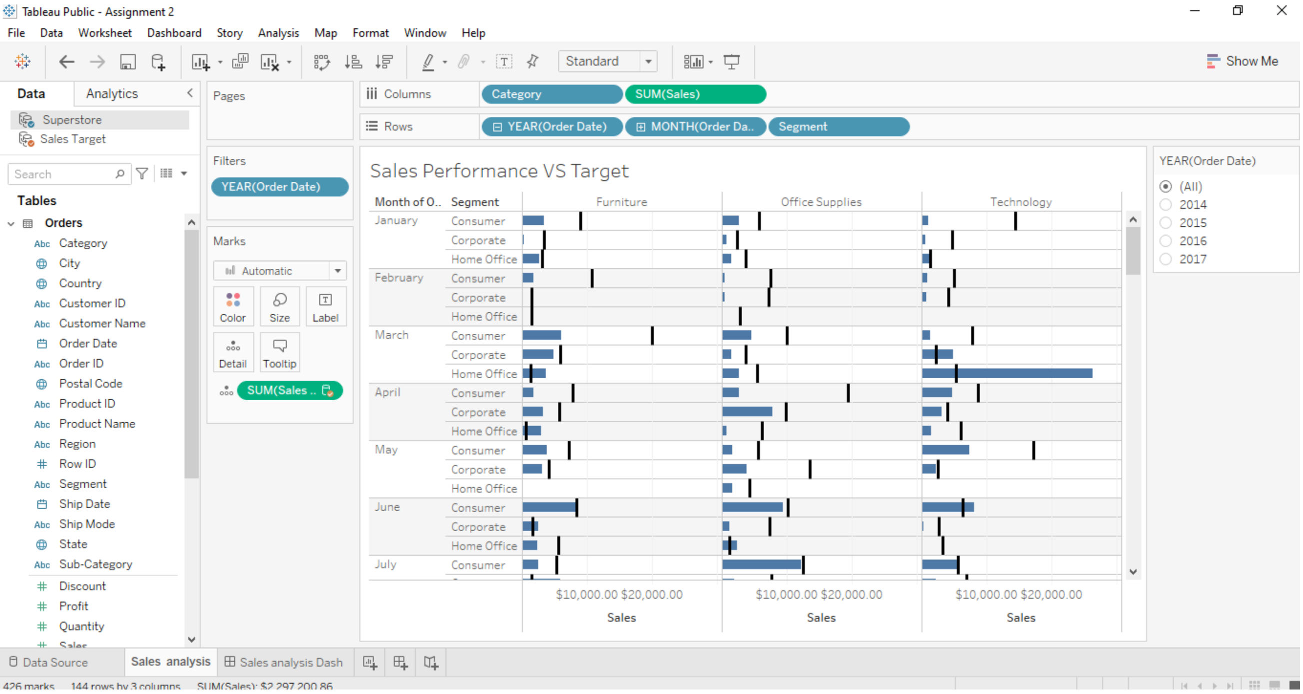


Step 9: To create Bullet Chart, First from Dimensions of Superstore drag **Category** to Columns and **Segment** to rows, from measure of Superstore drag **Sales** to columns and **Sales targets** of Sales target table to columns.

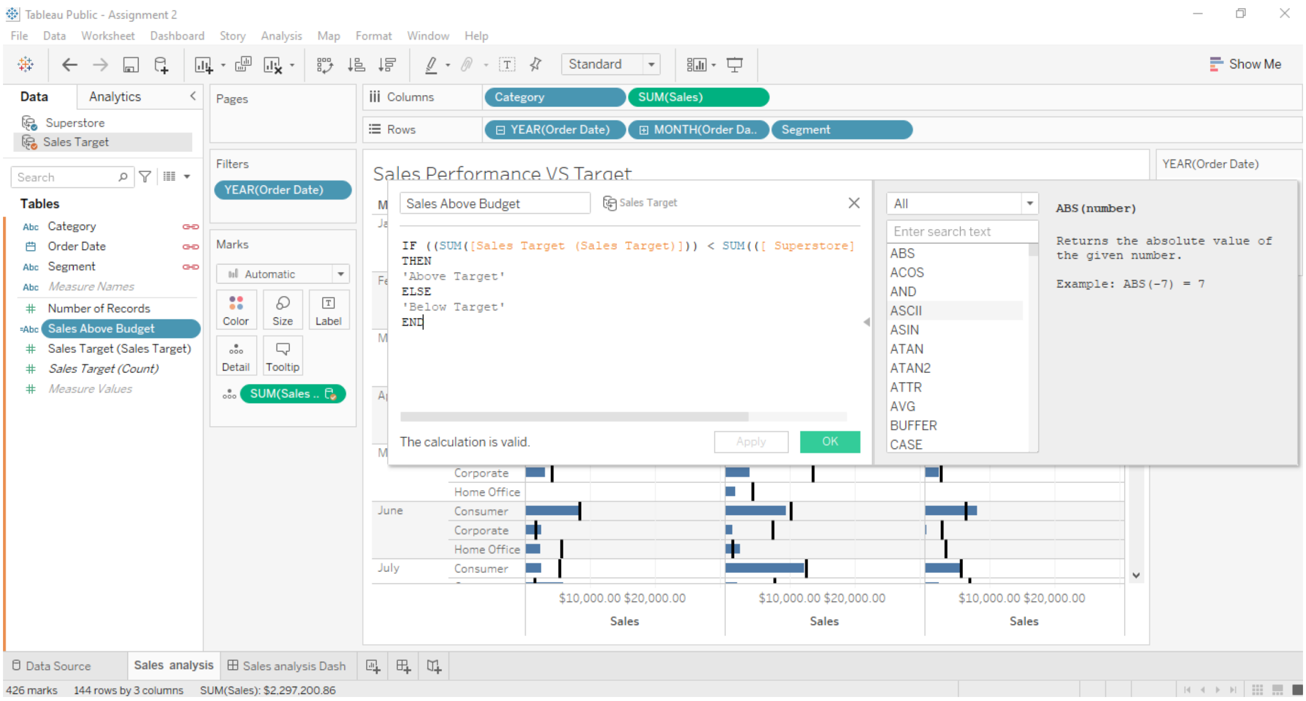
Step 10: USE Show me feature and click on Bullet Chart (in Data source part blue colour – Primary database and Orange – Secondary database)



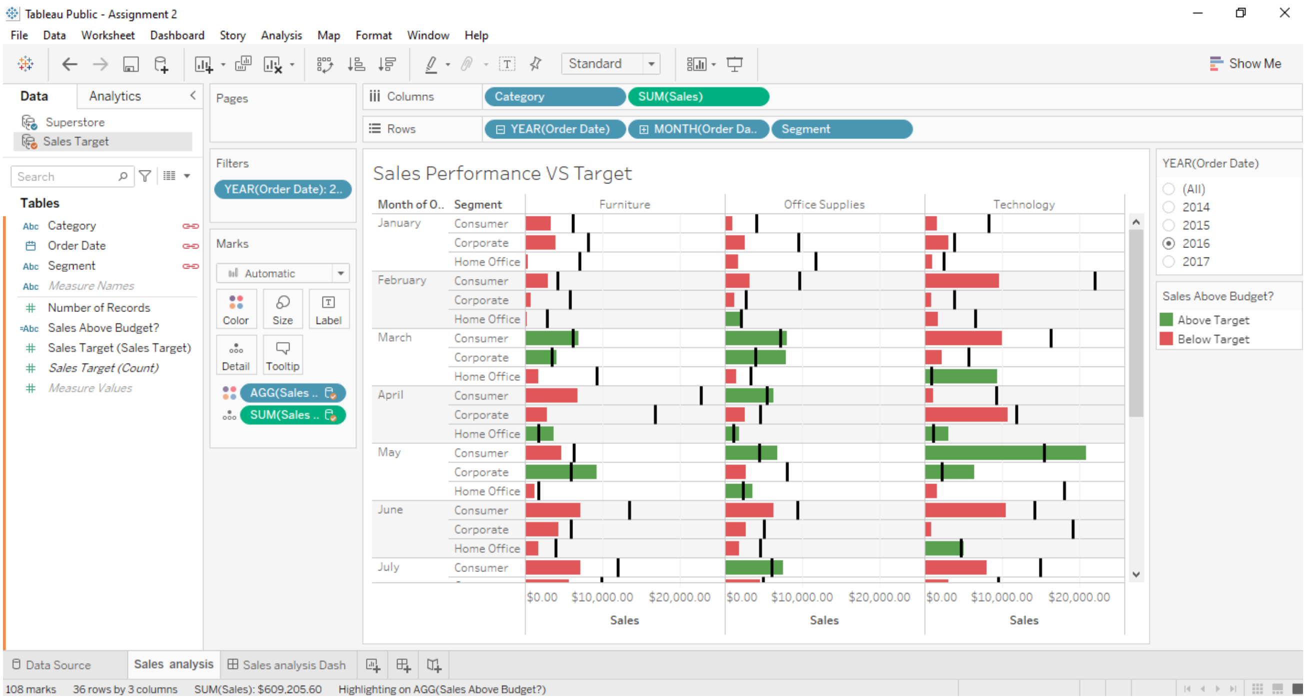
Step 11: To add Year filter, drag **order date** to rows and then click to year to get **month,** then click on **year** field and show filter, edit filter to select single value.



Step 12: Create a calculated Field, Go on Analysis and click **Calculated field** For Sales Budget (Write your code and then apply).

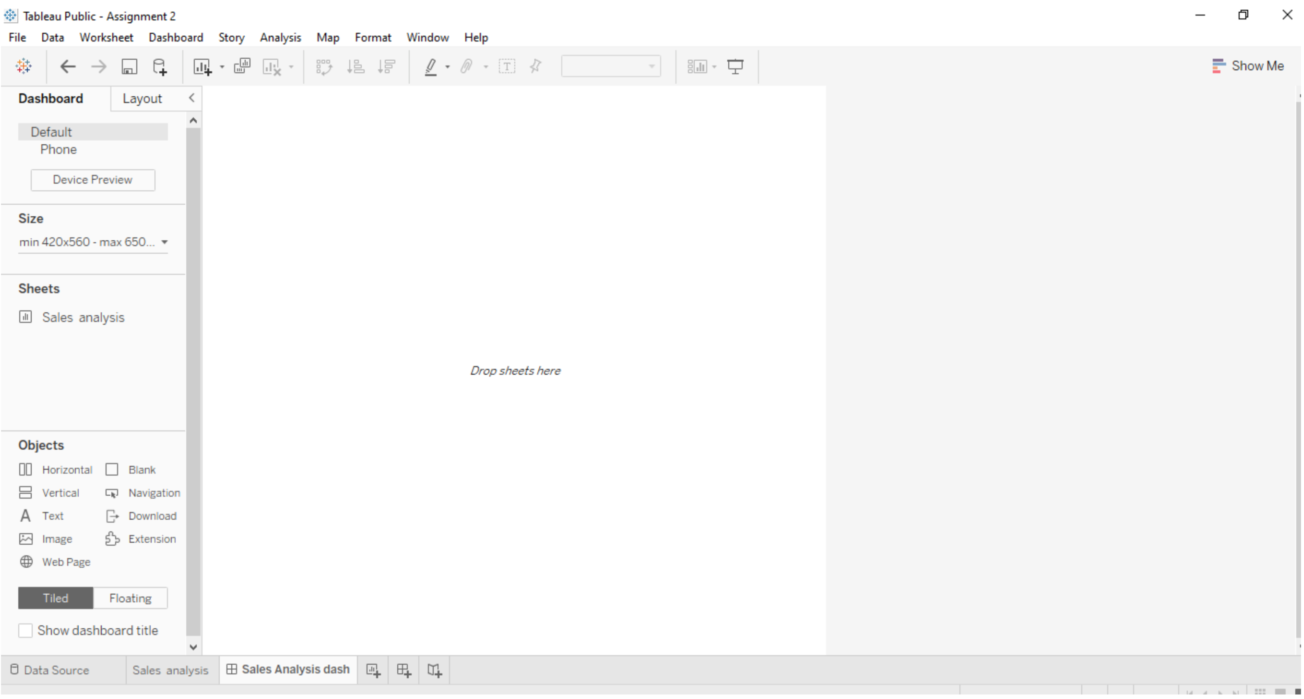


Step 13: Drag **Sales Above Budget** to colour mark, Then Edit colour <u>to Above target – Green and Below Target – Red.</u>



<u>**Hint:**</u> If you click on any bullet line, you will know the target year, month, segment, category, sales target, sales and whether it is above target or not.

Step 14: To Create a dashboard of this View, Click on **Dashboard Button** (Rename the dashboard as **Sales Analysis Dash**)



Step 15: Drag Sheet (**Sales analysis**) and drop on the dashboard (Sales Analysis dash)

Step 16: Click on Size – and select **Automatic**.