

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.

Tableau Public - Assignment 2

File Data Window Help

Connections

Sample - Superstore (1)
Microsoft Excel

Sheets

Orders
People
Returns
New Union

Superstore

Filters
0 | Add

Sort fields Data source order

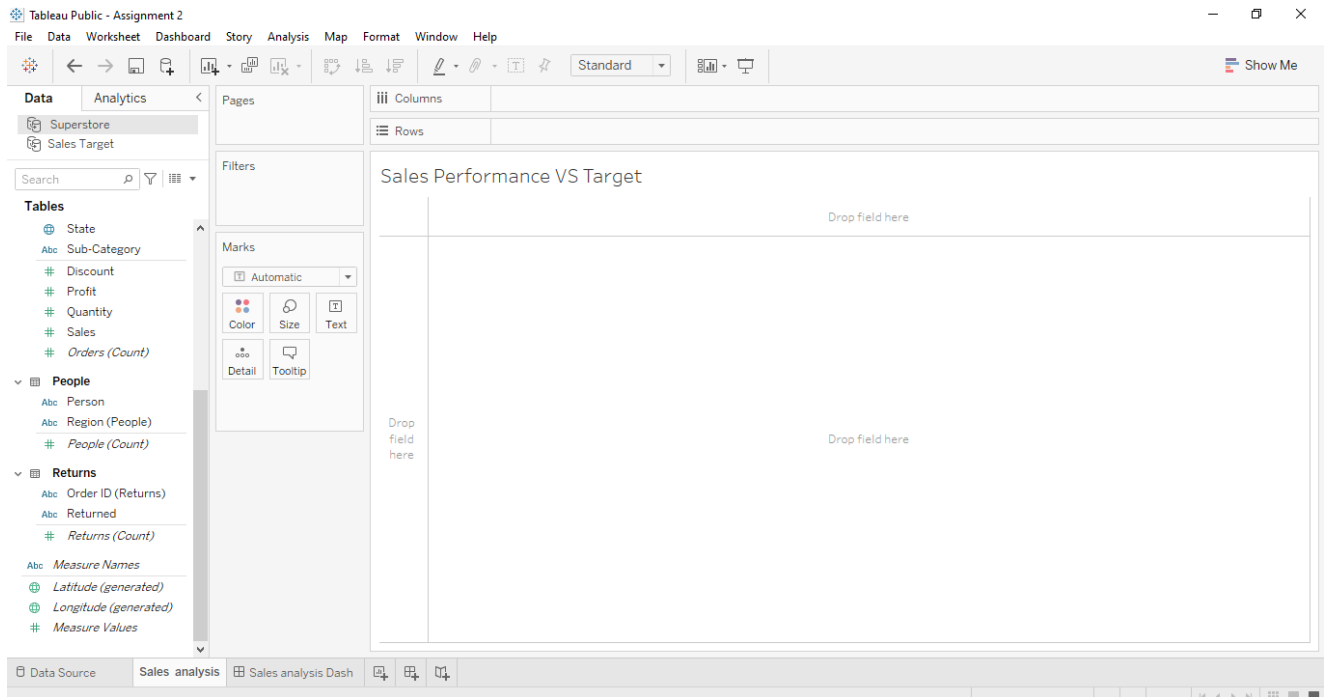
Show aliases Show hidden fields 1,000 rows

# Orders Row ID	Abc Orders Order ID	Abc Orders Order Date	Abc Orders Ship Date	Abc Orders Ship Mode	Abc Orders Customer ID	Abc Orders Customer Name	Abc Orders Segment	Abc Orders Country
1	CA-2016-152156	08-11-2016	11-11-2016	Second Class	CG-12520	Claire Gute	Consumer	United States
2	CA-2016-152156	08-11-2016	11-11-2016	Second Class	CG-12520	Claire Gute	Consumer	United States
3	CA-2016-138688	12-06-2016	16-06-2016	Second Class	DV-13045	Darrin Van Huff	Corporate	United States
4	US-2015-108966	11-10-2015	18-10-2015	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States
5	US-2015-108966	11-10-2015	18-10-2015	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States
6	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States
7	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States
8	CA-2014-115812	09-06-2014	14-06-2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States

Data Source Sales analysis Sales analysis Dash

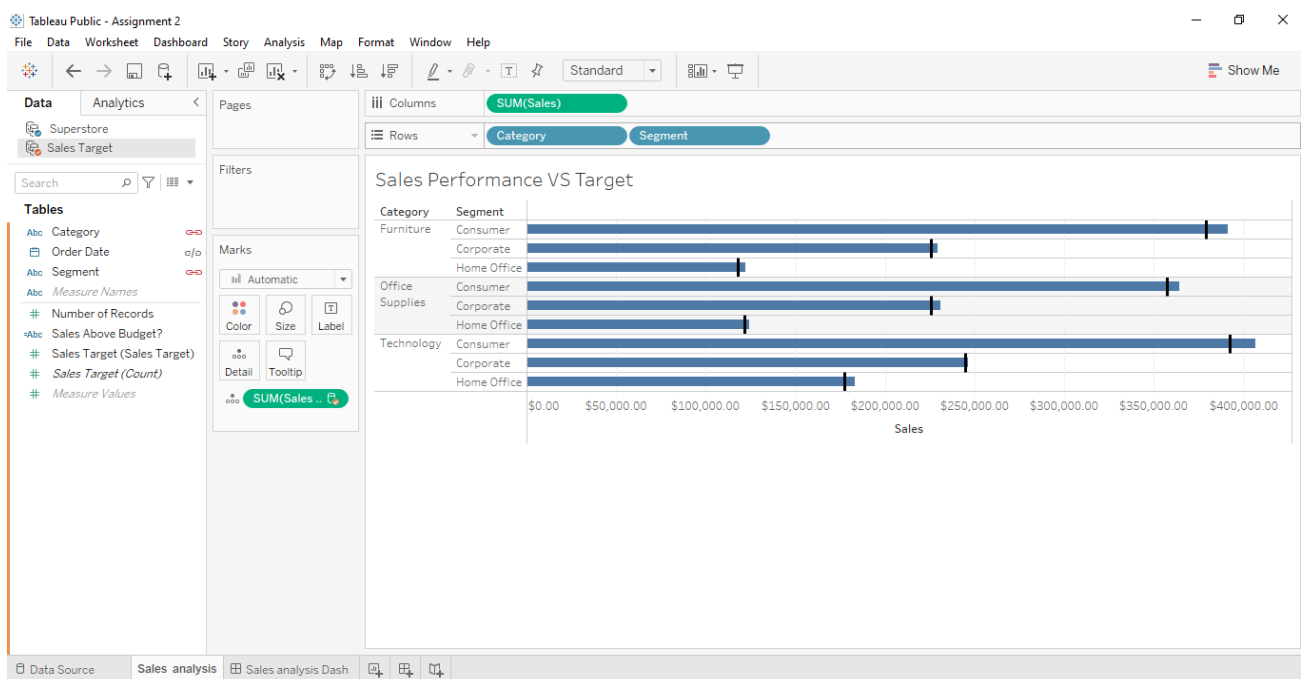
Step 7: To create a view, go to **Sheet 1** and rename it **Sales analysis**.

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)

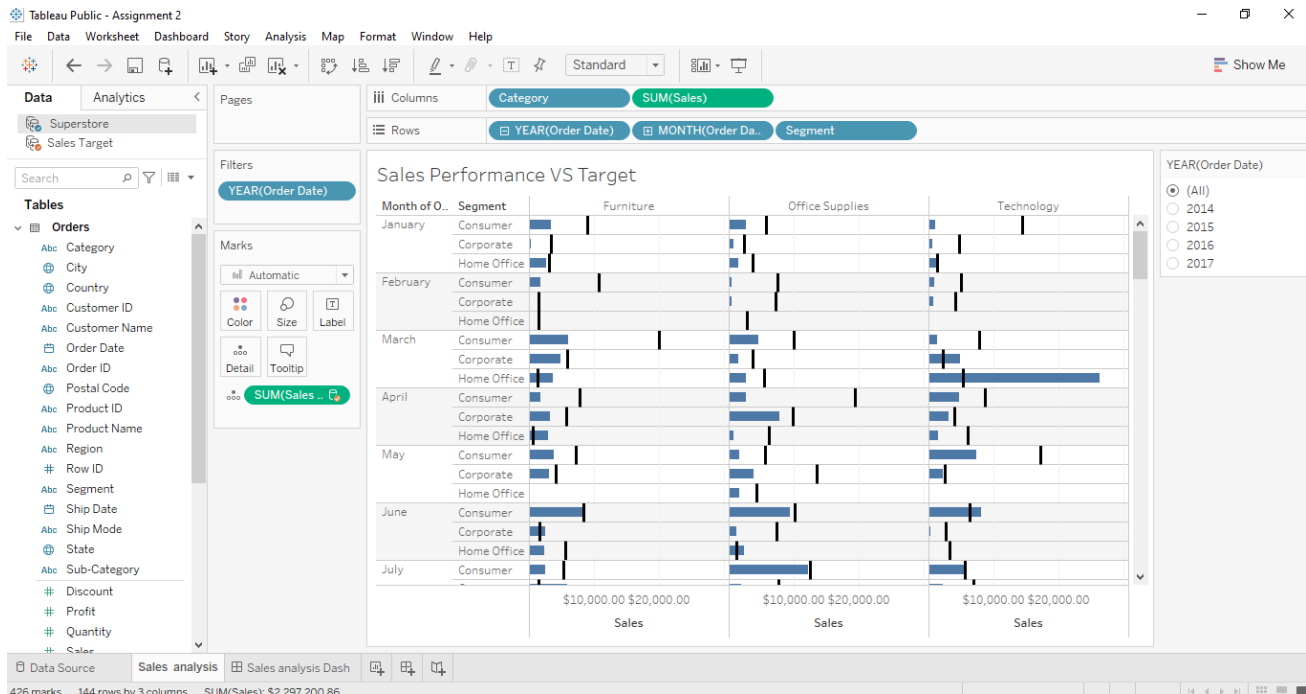


Step 9: To create Bullet Chart, First from Dimensions of Superstore drag **Category** to Columns and **Segment** to rows, from measure of Superstore drag **Sales** to columns and **Sales targets** of Sales target table to columns.

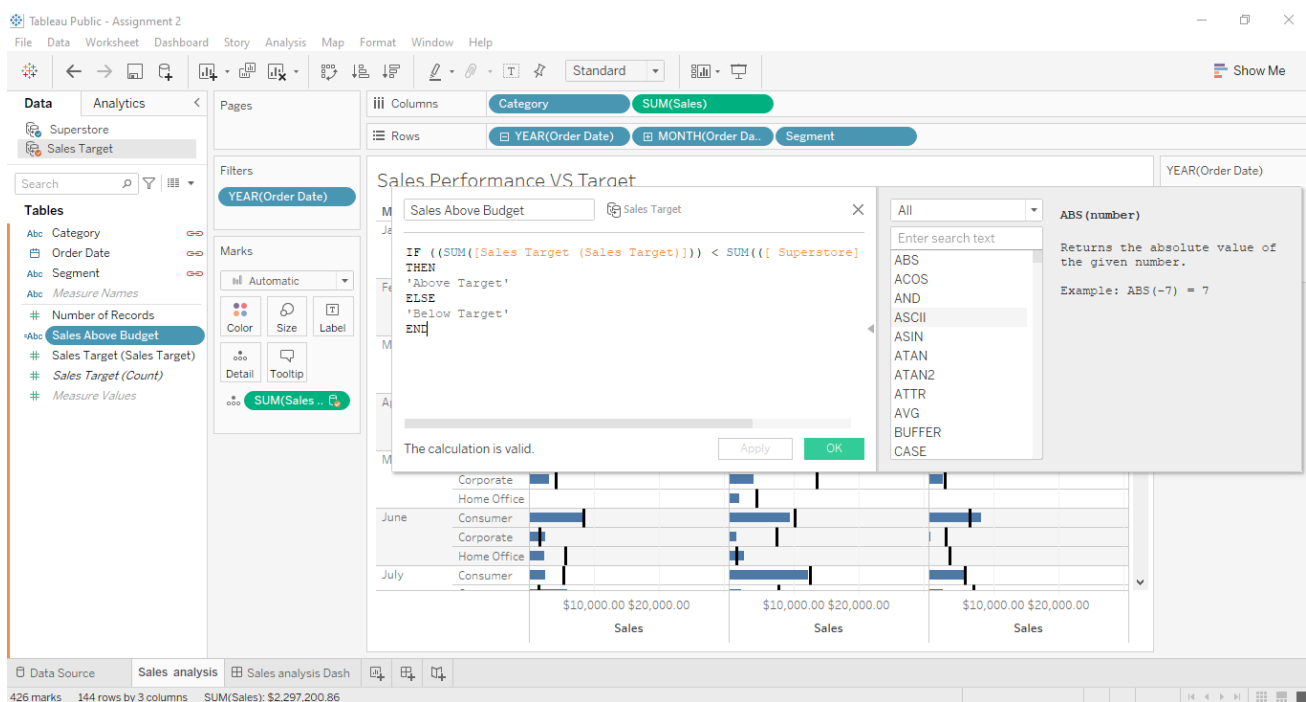
Step 10: USE Show me feature and click on Bullet Chart (in Data source part blue colour – Primary database and Orange – Secondary database)



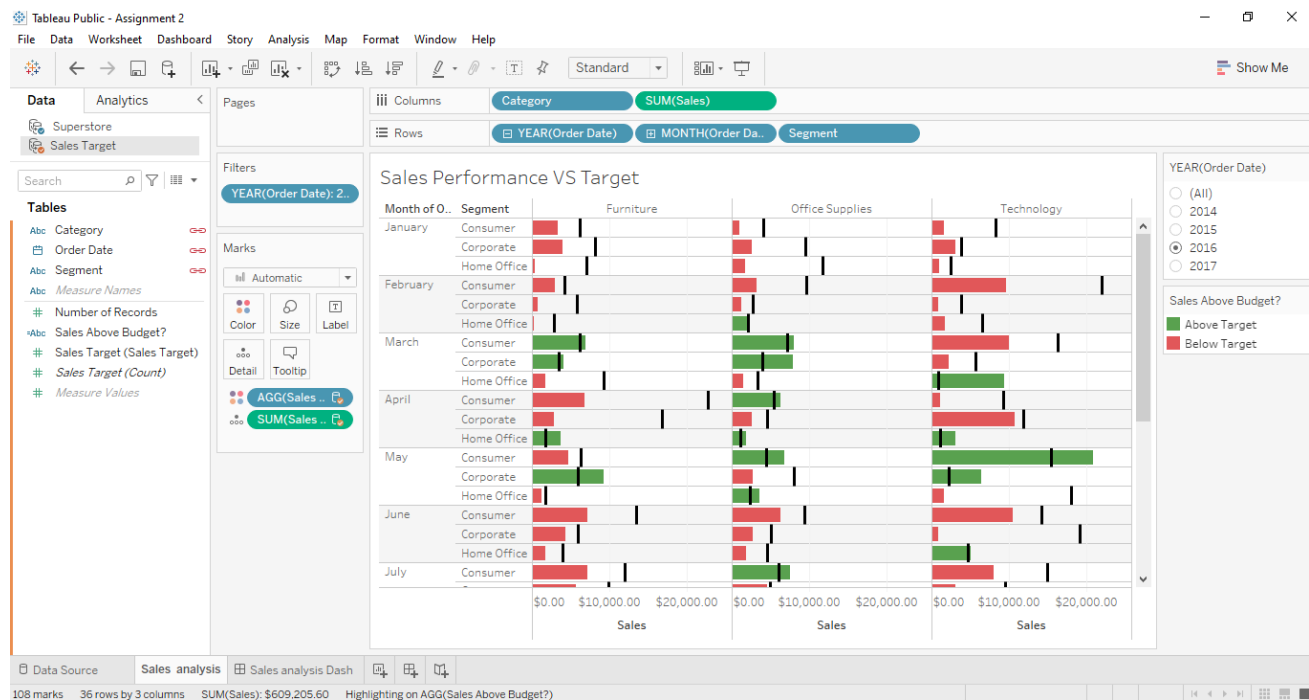
Step 11: To add Year filter, drag **order date** to rows and then click to year to get **month**, then click on **year** field and show filter, edit filter to select single value.



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

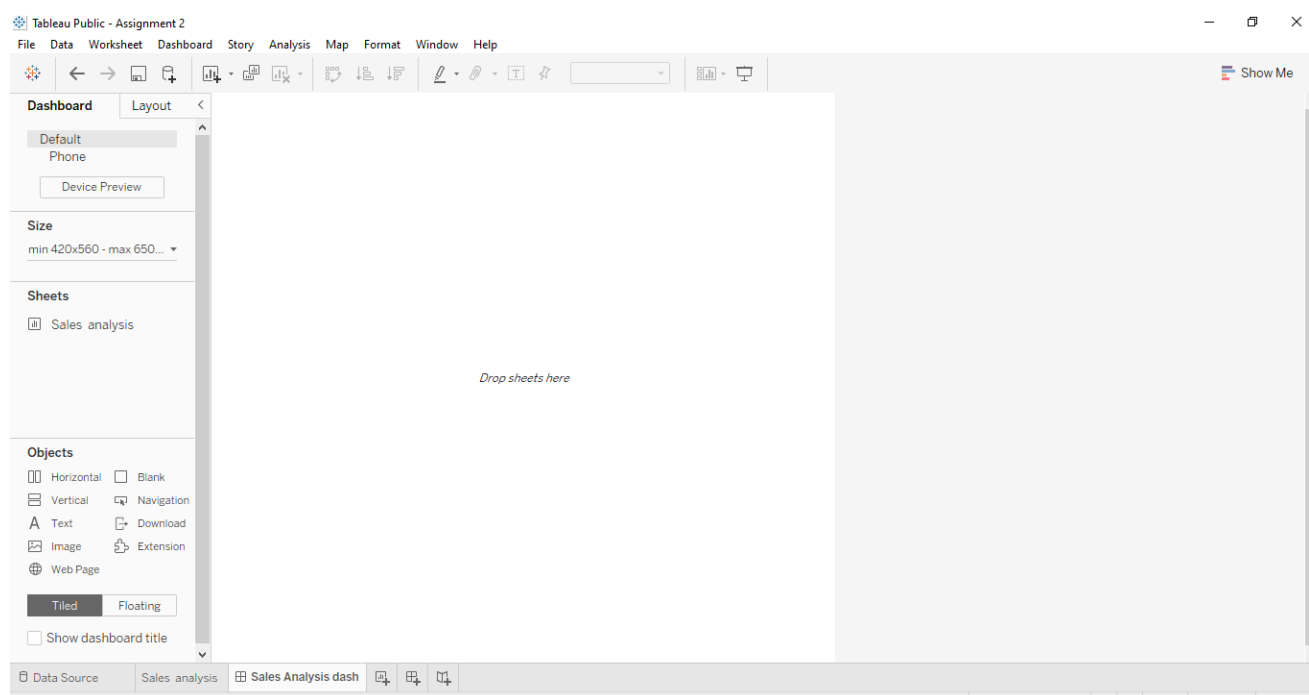


Step 13: Drag **Sales Above Budget** to colour mark, Then Edit colour to Above target – Green and Below Target – Red.



Hint: 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**.

