

Here are a few reference videos that provide insights into creating various charts and functions. These resources will give you a clear understanding of how to develop charts, functions, and a universal approach to creating content within Tableau for your project.

THINGS TO ANALYSIS

PROFITABILITY

Overview - bar chart: Continue using the bar chart to illustrate the sales funnel, emphasizing the progression of total sales from leads to completed orders. Add labels to each stage to show the respective values and percentage conversion rates.

<https://youtu.be/gUSevSBvLwU>

Profit Margin - Line Chart: Plot the profit margin over time using a line chart. This will help in identifying trends and fluctuations in profit margins over different periods. Include tooltips to show specific profit margin values for each data point.

To calculate profit margin in Tableau, you can follow these steps:

1. Create a Calculated Field for Profit Margin:
 - In Tableau, open your worksheet.
 - Right-click on an empty space in the "Data" pane on the left and select "Create Calculated Field."
 - Name the calculated field (e.g., "Profit Margin").
 - Use the following formula to calculate profit margin:
 - `scss`
 - Copy code
 - $(\text{SUM}([\text{Profit}]) / \text{SUM}([\text{Sales}])) * 100$
 - Click "OK" to create the calculated field.
2. Drag and Drop Fields:
 - Drag the relevant dimensions and measures to the Rows and Columns shelves as needed for your visualization.
 - Drag the newly created "Profit Margin" calculated field to the appropriate shelf, depending on where you want to display the profit margin.
3. Format the Profit Margin:
 - Right-click on the "Profit Margin" field in the view and select "Format."
 - Choose the appropriate number format (percentage) and adjust decimal places as desired.
4. Visualize the Data:
 - Choose a visualization type that suits your data, such as, line chart.
 - Customize the visualization to include labels, tooltips, and other relevant details.

	To create linechart, https://youtu.be/0xsLCwE0Yzo
Category profit in percentage - Pie Chart: to display the percentage contribution of different product categories to total sales. This visualization provides a clearer comparison of category sales and their proportion in the overall sales mix.	https://youtu.be/VwTKICXy4RE
Category profit in different months:Area Chart: Display the trend of overall profitability over time using an area chart. This visualization will help identify periods of high and low profitability and can offer insights into seasonality or trends affecting profitability.	https://youtu.be/zBVWvYuB9Ko
Profit by Customer Segment - Rounded Bar Chart: Create a bar chart to compare the profit generated from different customer segments, such as new customers, returning customers, and high-value customers. This chart can help identify which customer segments are contributing the most to profitability.	https://youtu.be/gUSevSBvLwU
Profit vs. Total sales in different months - Dual Axis Chart: Use a dual-axis chart to compare total profit and total sales over time. This visualization allows for a quick assessment of how well the superstore is managing its costs in relation to its profitability.	https://youtu.be/ImmeBu0mu34
GEOGRAPHIC-WISE	
Most Profitable Country - Map: Utilize a filled map to highlight the most profitable countries with varying colors based on their profit values. Add tooltips to display specific profit values for each country.	https://youtu.be/KDMGS9eE8ks?si=9mUvsgV3lpJzX0d0
Most Profitable Region - Bar chart: Utilize a barchart to highlight the most profitable regions with varying colors based on their profit values. Add tooltips to display specific profit values for each region.	https://youtu.be/gUSevSBvLwU

Total Sales in Country-Pie chart	https://youtu.be/VwTKICXy4RE
Total sales in statewise-	https://youtu.be/PVfVcqgq92Q?si=odrSZK8EXJgb55aF
Regional Growth Rate - Multiple Line Chart: Show the growth rate of sales for each region over time using a line chart. This chart can reveal which regions are experiencing the highest growth and their overall performance.	https://youtu.be/6o_D9vDZfa8?si=9tSxqn8poLuTWRJ6
CATEGORY	
Category-wise Total Sales - Funnel Chart: Continue using the funnel chart to visualize the total sales for each product category. Consider sorting the bars in descending order to highlight the top-selling categories.	https://youtu.be/yD3VXn3Mars
Top Subcategory - Waterfall chart: Use a waterfall chart to present subcategory sales, allowing for easy comparison and identification of top-performing subcategories.	https://youtu.be/pdHfawOuO7c
Sub Category and Sales-stacked bar chart:	https://youtu.be/gUSevSBvLwU
Total sales and profit-Tree map:	https://youtu.be/4Sx3VQg7Lgl
Countrywide Sales Percentage - Pie Chart: Consider using a horizontal bar chart instead of a pie chart to show the percentage sales contribution of each country to the total sales. This chart format enables better readability and comparison.	https://youtu.be/VwTKICXy4RE
Category and percentage difference in different months-	https://youtu.be/hzc7NT7n5AA?si=xzjXIRO-cGvu_UYz
Sales of category in different months-Line chart:	https://youtu.be/0xsLCwE0Yzo
SHIPPING	
Shipping Cost by region, country and state and- Bar Chart: Continue using the bar chart to compare shipping costs across different country, region and state providing insights into shipping expenses in each area.	https://youtu.be/gUSevSBvLwU

Shipped Status - Bubble chart Chart: Use a bubble chart to visualize the distribution of orders by different status categories, including "Shipped" and others like "In Transit" or "Delivered."	https://youtu.be/oR74cb6dSZc?si=4gFNehLptq8VvbCH
Top shipping countries-Treemap:	https://youtu.be/4Sx3VQg7Lgl
Shipping Cost by Product Category - Box plot Chart: Compare the shipping cost for different product categories using a bar chart. This visualization can help identify which categories have higher shipping costs and might require optimization.	https://youtu.be/bAcSMSWRKII?si=Ft8W4M54XrzZ2u3i
Shipping Time by Region - Line Chart: Use a heat map to display the average shipping time for different regions. This chart can help identify regions where shipping times might need improvement.	https://youtu.be/0xsLCwE0Yzo
CUSTOMERS	
Total Customers - Number Chart: Keep the number chart to display the total number of customers, providing a quick summary of the customer base.	<ol style="list-style-type: none"> 1. Drag Customer ID and Count to the View: <ul style="list-style-type: none"> ○ From the "Data" pane, drag the "Customer ID" field to the Rows shelf. ○ Drag the "Count" measure to the Text shelf. 2. Show Me: <ul style="list-style-type: none"> ○ In the "Show Me" pane (usually located on the right side of the screen), you can select the "Text Tables" chart type. 3. Format the Text Table: <ul style="list-style-type: none"> ○ Customize the appearance of the text table by adjusting fonts, colors, and other formatting settings. ○ You can also add additional fields to the Columns shelf or apply filters to refine the displayed data.
Top Customer - Lollipop Bar Chart: Use a bar chart or a table to showcase the top customers based on their total spending. Add customer names and their respective spending values for easy comprehension.	https://youtu.be/gUSevSBvLwU

Underperforming customer-Lollipop Bar Chart: Use a bar chart or a table to showcase the low customers based on their total spending. Add customer names and their respective spending values for easy comprehension.	https://youtu.be/gUSevSBvLwU
Customers and Region,Country and State by sales - Bar Chart: to show the distribution of customers across different regions. This visualization highlights the concentration of customers in various areas.	https://youtu.be/gUSevSBvLwU
Customer Retention Rate - Line Chart: Show the customer retention rate over time using a line chart. This chart can provide insights into the effectiveness of customer retention strategies and identify periods of high or low retention.	https://youtu.be/0xsLCwE0Yzo

CONNECTING DATA	
Connecting data from Google drive to Tableau	https://youtu.be/bHydfaRd7Y4?si=aV-K-svvvKNP6kjq

CREATING SHEETS,CUSTOMISING AND PREPARATION OF DASHBOARD	
Creating sheets Customising sheets Adding sheets to dashboards Customising dashboards	https://youtu.be/6oFTdbrugUs
adding images/logo	https://youtu.be/f2LYwLd5oGM
Creating Info icons	https://youtu.be/0NcLn_zRvI4
Adding buttons and Navigation to all dashboards	https://youtu.be/yoSFeiA0fSY
Adding URL/Hyperlinks	https://youtu.be/WG4Yh5jQjOM?si=REF1Is2Q4QGw-YPM
Adding Filter	https://youtu.be/cDCJqo7WcqY

Creating “Reset All” button	https://youtu.be/itss6rPQAIE
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CREATING STORYBOARD	
adding dashboards to story Customising layouts	https://youtu.be/_jK0nIm349g

PUBLISHING STORY	
Saving to Tableau public	https://youtu.be/EzFjrSAetsA