

Tableau Desktop 10 - Project

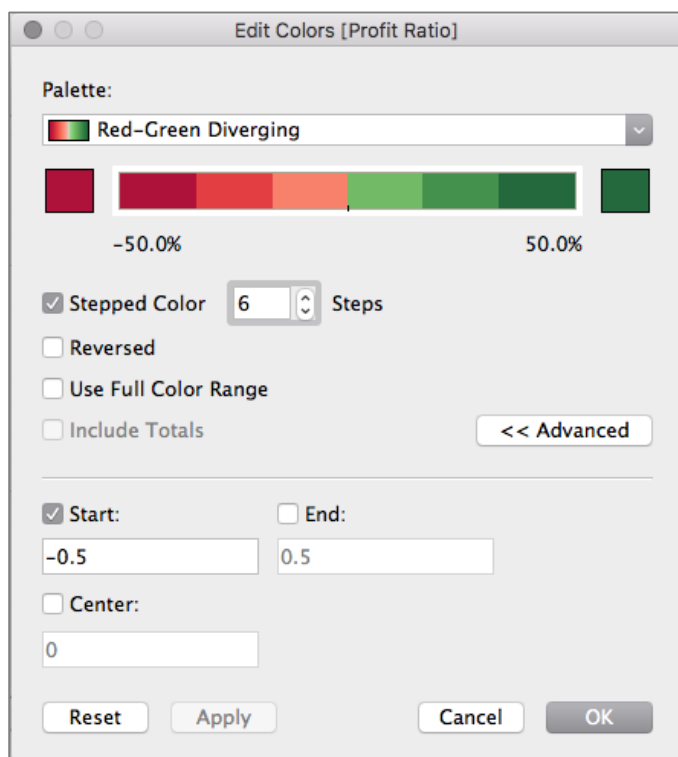
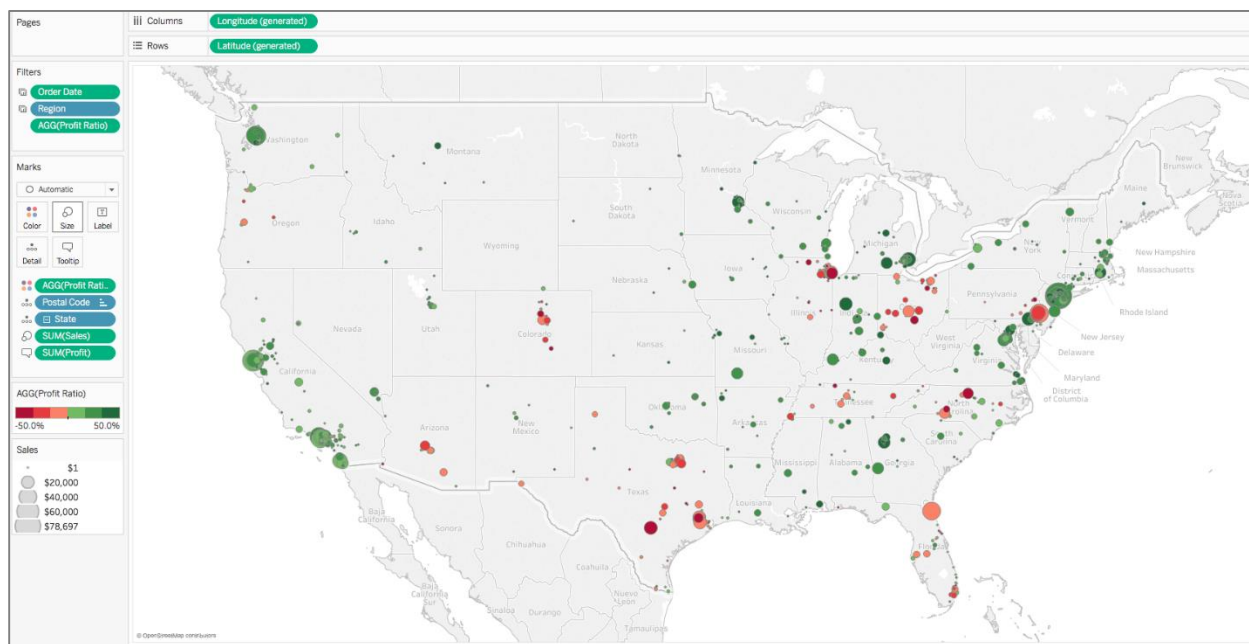
Solution

Project 4: Sales Dashboard

Step 1: Create a table with Measure Names in the columns shelf. This will bring all measures into the view. Also, bring **Region** and **Order Date** into the Filters shelf (you will need these later). Format the measures as dollars, percentages, or units. Rename the sheet as “Profitability Statistics.”

Pages	Columns	Measure Names				
	Rows					
Filters						
Region						
Measure Names						
Order Date						
Marks						
Automatic						
Color						
Size						
Text						
Detail						
Tooltip						
Measure Values						
SUM(Sales)						
SUM(Profit)						
AGG(Profit Ratio)						
AGG(Profit per Order)						
AGG(Sales per Customer)						
AVG(Discount)						
SUM(Quantity)						

Step 2: Create a map by dragging **Latitude** and **Longitude** into a view. Add **Country** to the Detail shelf and drill down to **State**. Add **Sales** to the Size shelf and **Profit** to the Tooltip. Add **Profit Ratio** to the Color shelf. Add **Order Date**, **Region**, and **Profit Ratio** to the Filters shelf (you will need these later). Change the color coding to “Red-Green Diverging.” Rename the worksheet as “Sales Map.”



Step 3: Create a table with **Month of Order Date** in the Columns shelf and **Segment** and **Sales** in the Rows shelf. Rename the worksheet as “Sales by Segment.”

Pages

Columns

MONTH(Order Dat..

Rows

Segment

Filters

Order Date

Region

Marks

Automatic

Color

Size

Text

Detail

Tooltip

SUM(Sales)

	January 2012	February 2012	March 2012	April 2012	May 2012	June 2012	July 2012	August 2012	Septemb er 2012	October 2012	Novemb er 2012	Decembe r 2012	January 2013
Consumer	\$6,637	\$3,459	\$11,869	\$9,109	\$12,819	\$25,924	\$20,198	\$16,215	\$59,691	\$16,247	\$46,572	\$37,358	\$14,275
Corporate	\$1,702	\$1,184	\$11,107	\$14,132	\$9,142	\$3,971	\$10,033	\$7,452	\$15,508	\$12,638	\$20,994	\$20,574	\$3,382
Home Office	\$5,608	\$168	\$32,715	\$5,055	\$1,687	\$4,700	\$3,716	\$4,242	\$6,579	\$2,569	\$11,062	\$11,614	\$517

Step 4: Create a calculated field that specifies if an order is profitable or not.

Order Profitable?

Sample - Superstore

×

```

{fixed [Order ID]:sum([Profit])}>0
// calculates the profit at the order level

```

The calculation is valid.

Sheets Affected ▾

Apply

OK

Step 5: Apply the formula to the table.

Pages

Columns

MONTH(Order Date)

Rows

Segment

Order Profitable?

Filters

Order Date

Region

Marks

Automatic

Color

Size

Text

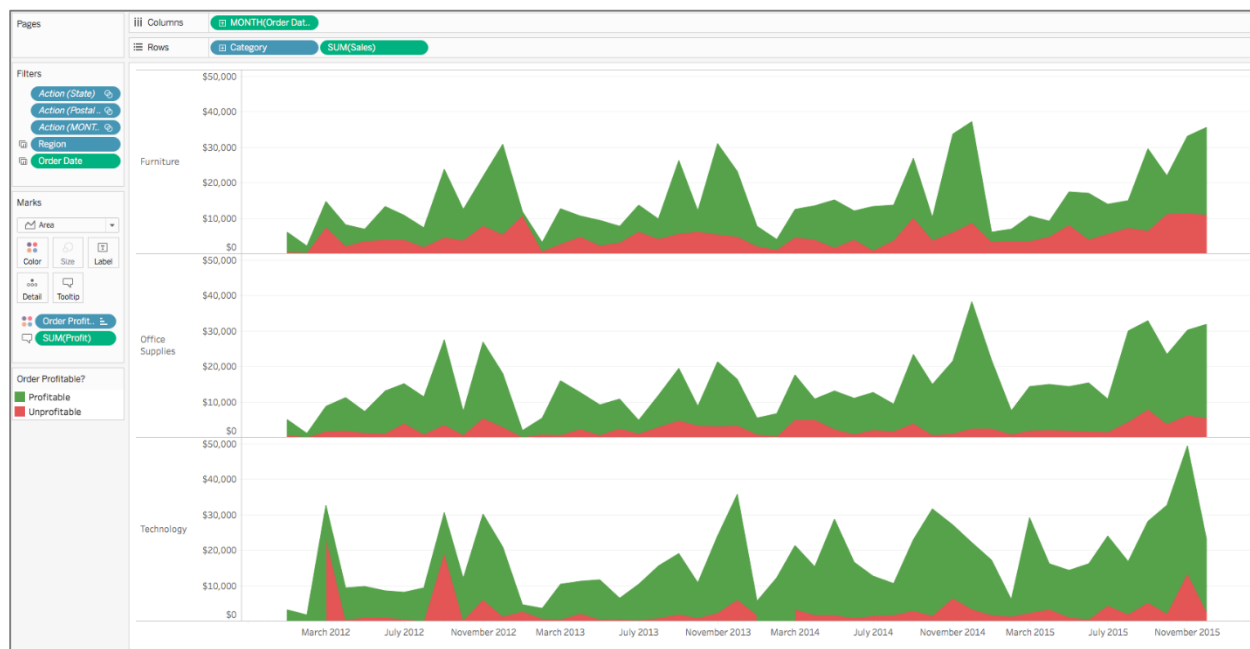
Detail

Tooltip

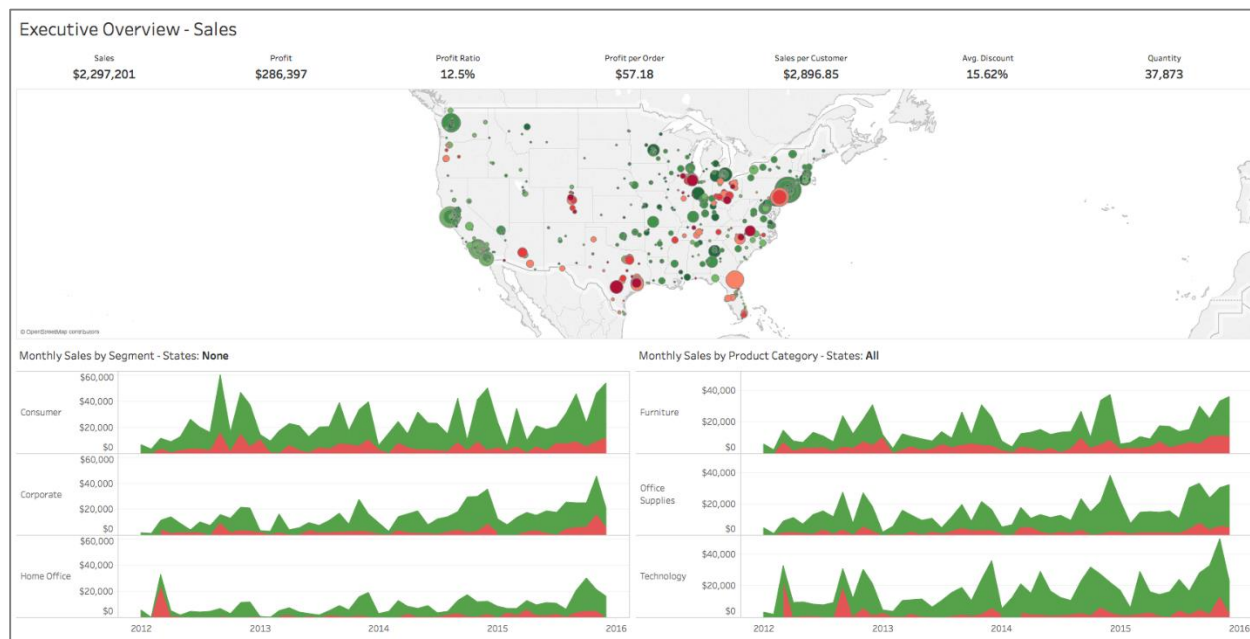
SUM(Sales)

		January 2012	February 2012	March 2012	April 2012	May 2012	June 2012	July 2012	August 2012	September 2012	October 2012	November 2012
Consumer	Unprofitable	\$772	\$194	\$3,767	\$1,363	\$2,949	\$3,848	\$3,688	\$2,754	\$16,485	\$2,489	\$15,254
	Profitable	\$5,865	\$3,264	\$8,102	\$7,746	\$9,870	\$22,076	\$16,510	\$13,461	\$43,206	\$13,758	\$31,318
Corporate	Unprofitable	\$129		\$4,224	\$1,719	\$2,248	\$2,077	\$2,433	\$30	\$9,566	\$2,098	\$3,898
	Profitable	\$1,572	\$1,184	\$6,883	\$12,413	\$6,894	\$1,894	\$7,600	\$7,422	\$5,941	\$10,540	\$17,097
Home Office	Unprofitable	\$288	\$11	\$24,643	\$924	\$528		\$2,222		\$1,172	\$5	\$16
	Profitable	\$5,319	\$157	\$8,072	\$4,131	\$1,160	\$4,700	\$1,493	\$4,242	\$5,407	\$2,564	\$11,047

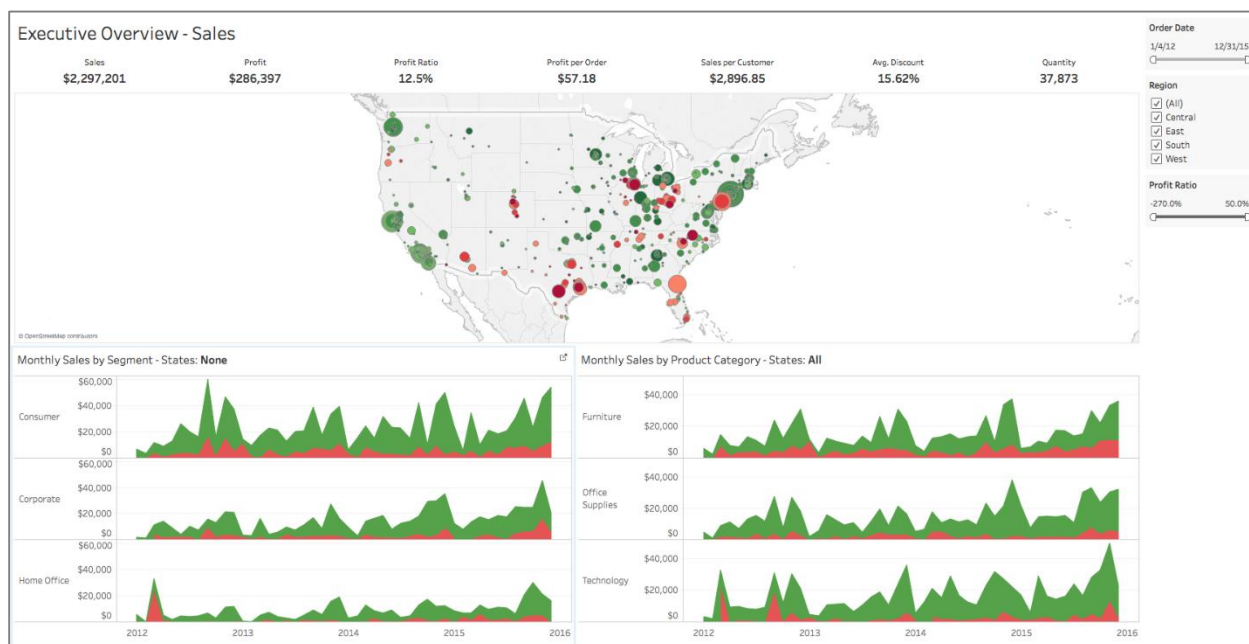
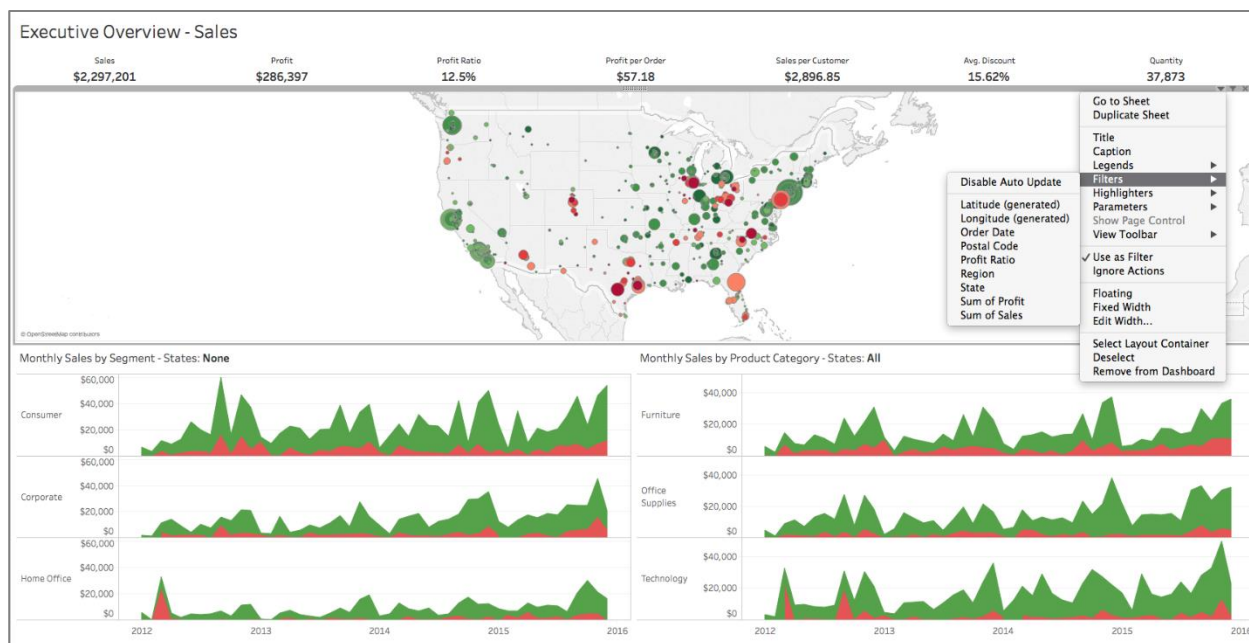
Step 7: Duplicate the “Sales by Segment” worksheet and replace the Segment dimension with the Category dimension, Rename the sheet “Sales by Category.”



Step 8: Create a Dashboard with the “Probability Statistics” view at the top, the “Sales Map” below that, and the “Sales by Segment” and “Sales by Category” views side by side at the bottom of the page.



Step 9: From the Sales Map tab, add Filters for **Order Date**, **Region**, and **Profit Ratio**. Set up the Filters to impact all four views in the Dashboard:



Step 10: Create and add a Filter Action so when the user clicks on the marks in the map, the other views are filtered to show data for the selected mark(s). Set up the Action so that it is triggered when the user clicks on a mark (or marks) within the map. Set up the Action so that the filter is removed and all values are shown when the user clears the filter:

Add Filter Action

Name: ▶

Source Sheets:

▼

Run action on:

☐ Hover

☒ Select

☐ Menu

☐ Run on single select only

Target Sheets

▼

Clearing the selection will:

☐ Leave the filter

☒ Show all values

☐ Exclude all values

Target Filters

☐ Selected Fields ☒ All Fields

Source Field	Target Field	Target Data Source

Step 11: Save your workbook as “Sales Dashboard.”