

Tableau Desktop 10 - Project

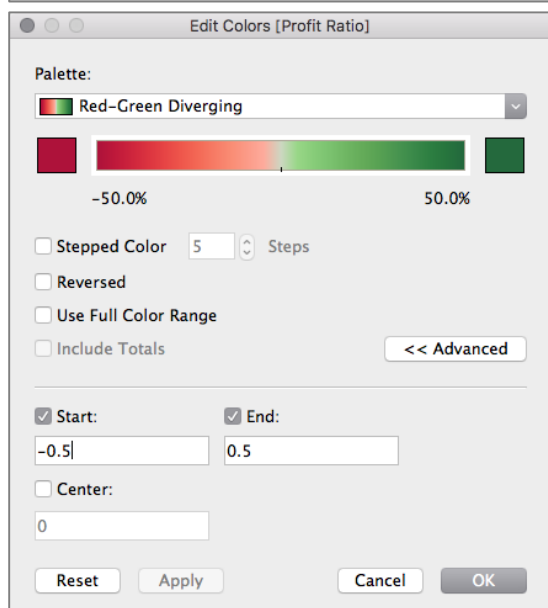
Solution

Project 2: Customer Analysis

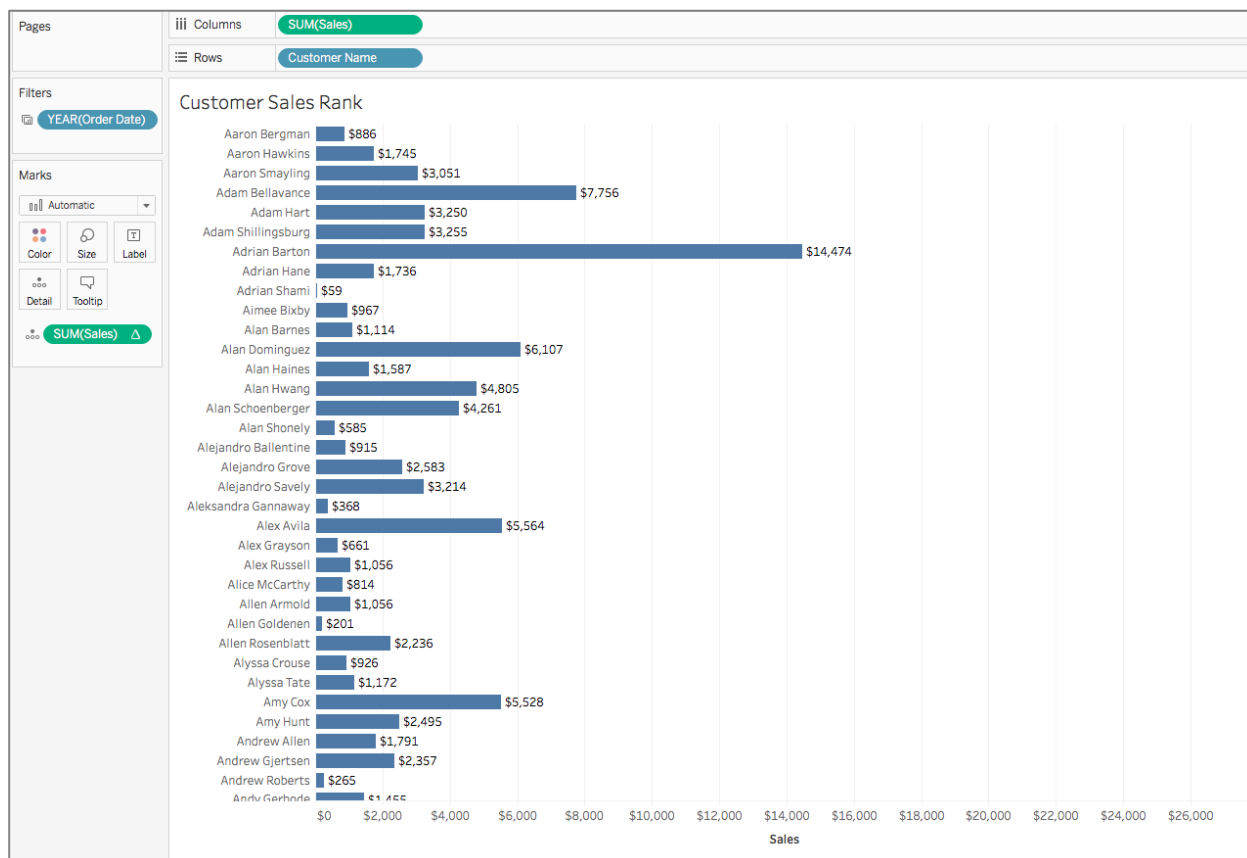
Step 1: Create a table with **Region** on the Rows shelf, and **Customer (Count)**, **Sales**, **Quantity**, **Sales per Customer**, **Profit**, and **Profit Ratio** on the Columns shelf. Rename the worksheet as “Customer Statistics.”



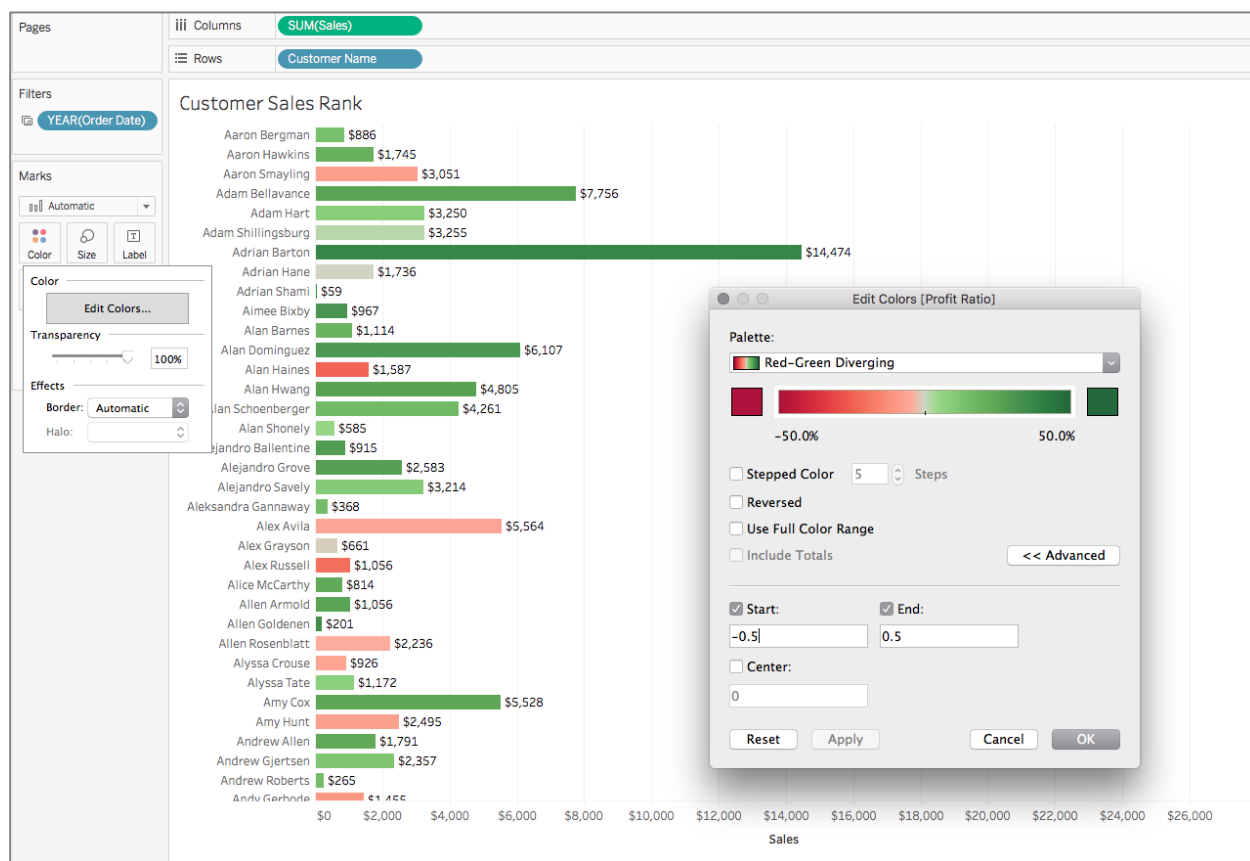
Step 2: Create a scatter plot with **Sales** on the X axis, **Profit** on the Y axis, **Customer Name** on the Detail shelf, and **Profit Ratio** on the Color shelf. Change the color settings to show “Red–Green Diverging” with the color green as positive profit ratio, and the color red as negative profit ratio. Rename the sheet and provide the title **Sales and Profit by Customer Scatter**.



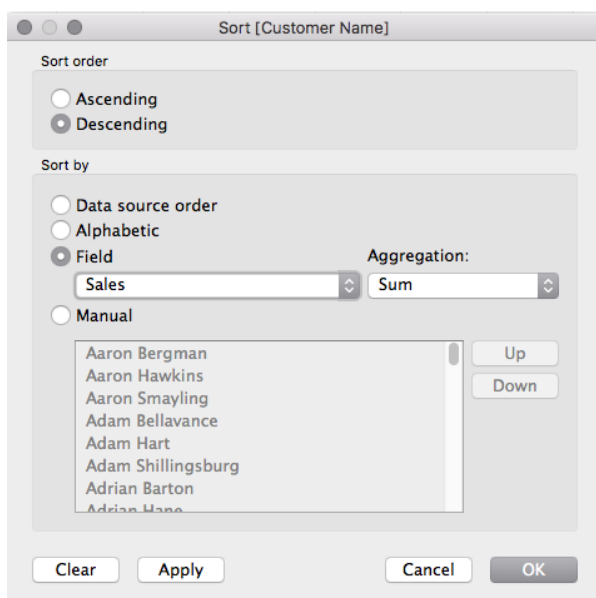
Step 3: Create a view with **Customer Name** on the Rows shelf and **Sales** on the Columns shelf. Title the view and name the worksheet “Customer Sales Rank.”



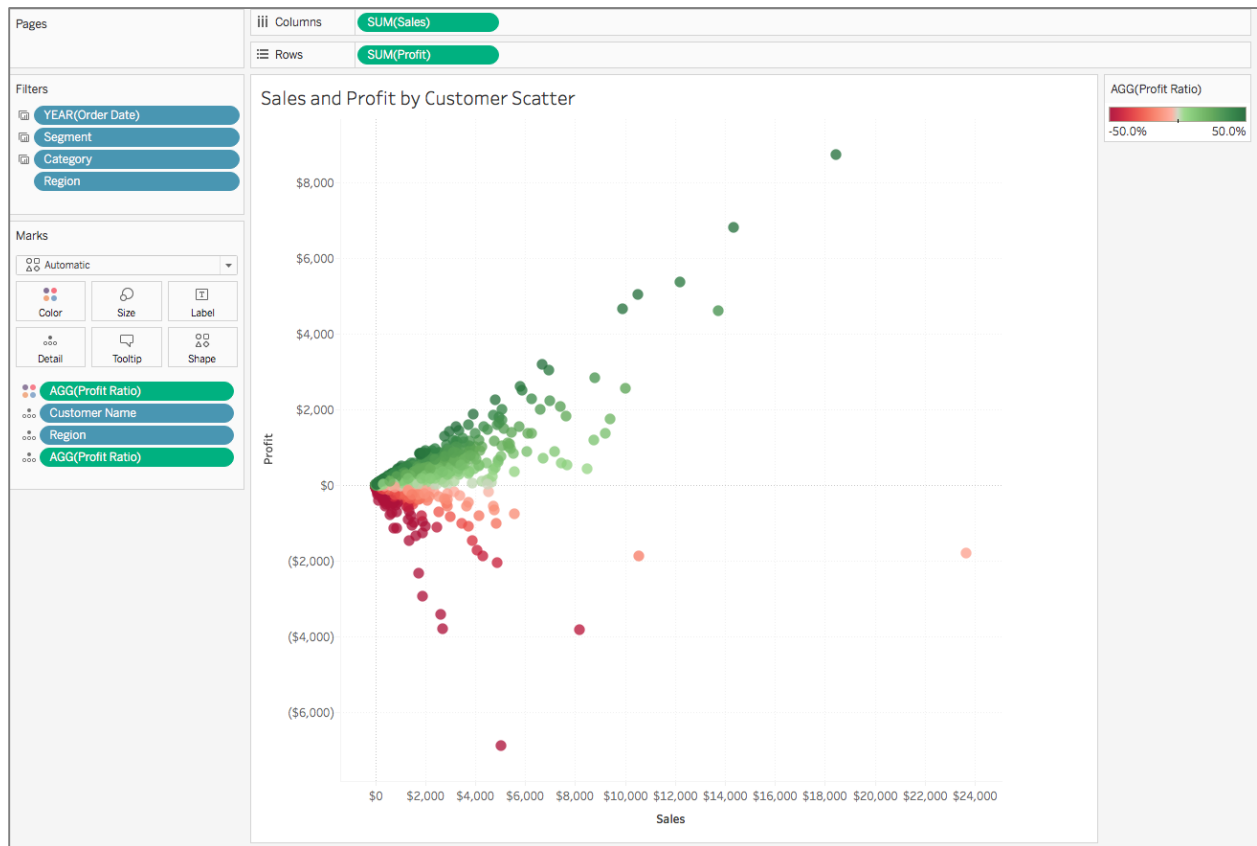
Step 4: Drag the **Profit Ratio** to the Color shelf, and set the color to “Red–Green Diverging.”



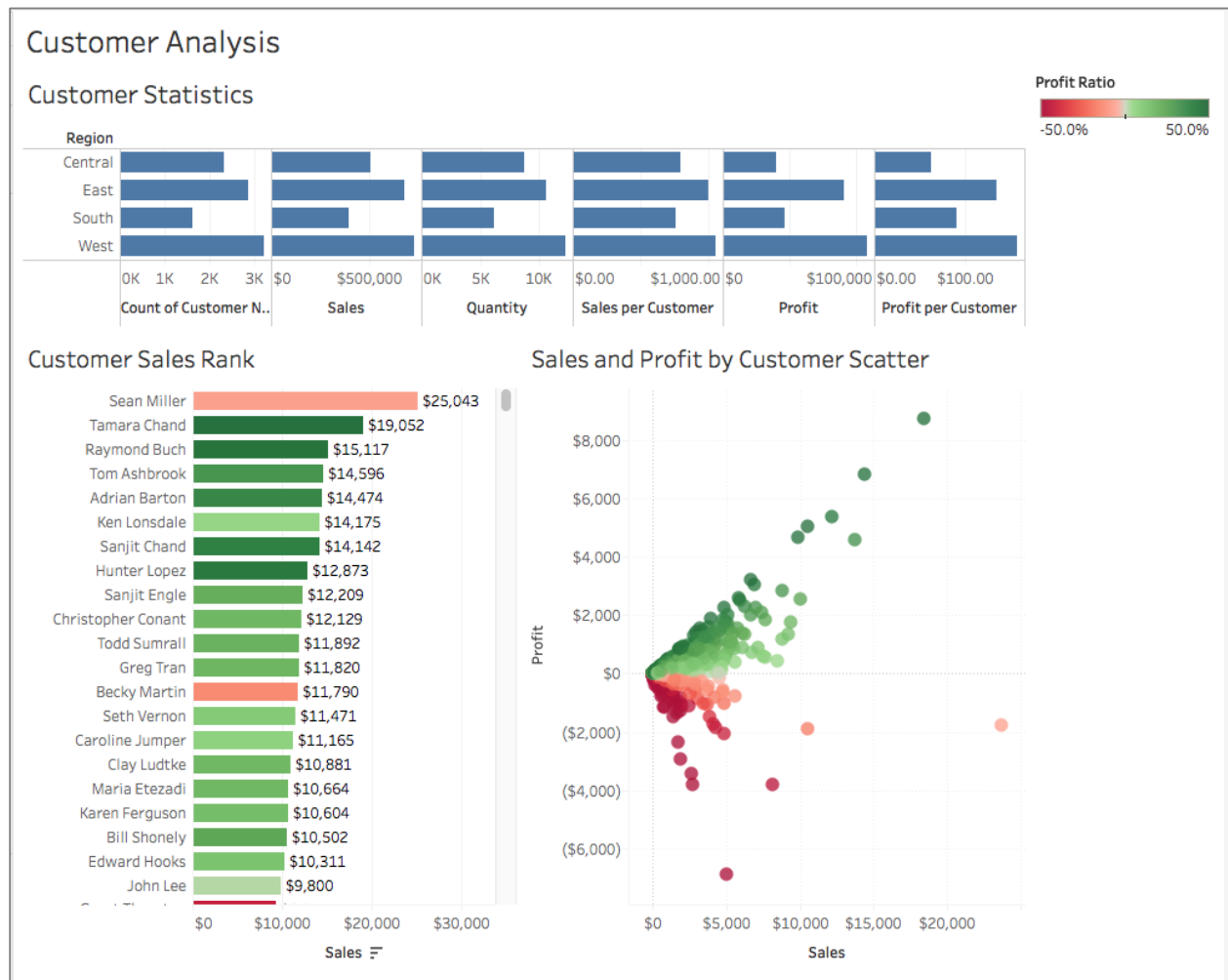
Step 5: Sort the **Customer Name** field by Sales in Descending order.



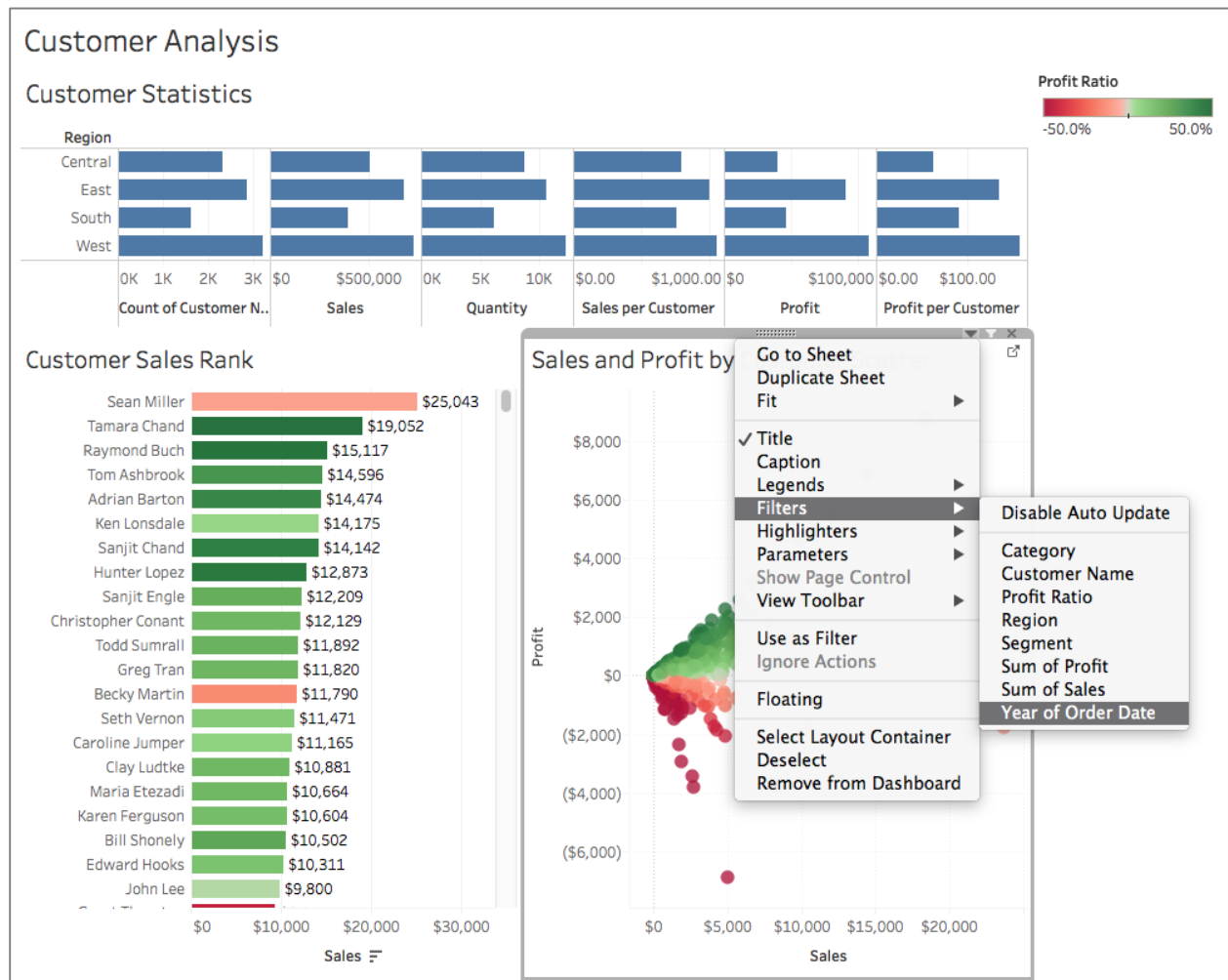
Step 6: Add **Category** and **Segment** fields to the Filter shelf (you will use these later).



Step 7: Create a Dashboard with the three views, with Customer Statistics at the top, the Customer Rank on the bottom left, and the Customer Sales Scatter on the bottom right. Rename the Dashboard and title it as “Customer Analysis.”

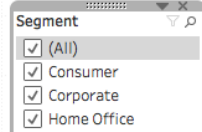
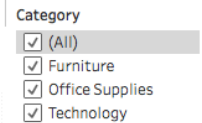
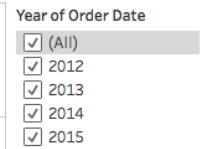
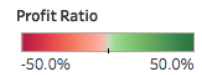
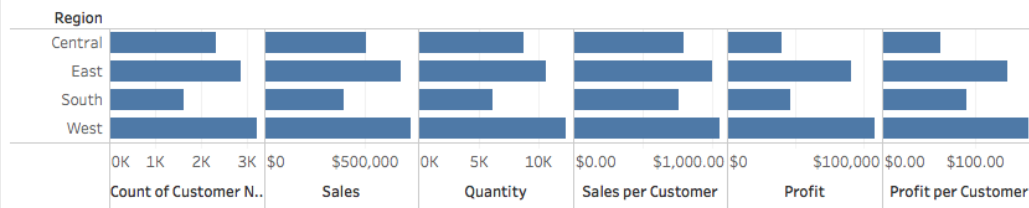


Step 8: Add Filters for **Year**, **Category**, and **Segment** to the Dashboard. From the Scatter view, add Filters for **Year of Order Date**, **Category**, and **Segment**. Set the Filters to impact all three views on the Dashboard.

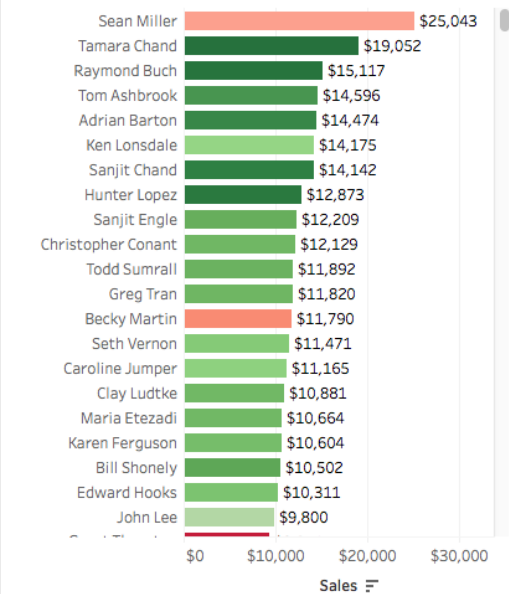


Customer Analysis

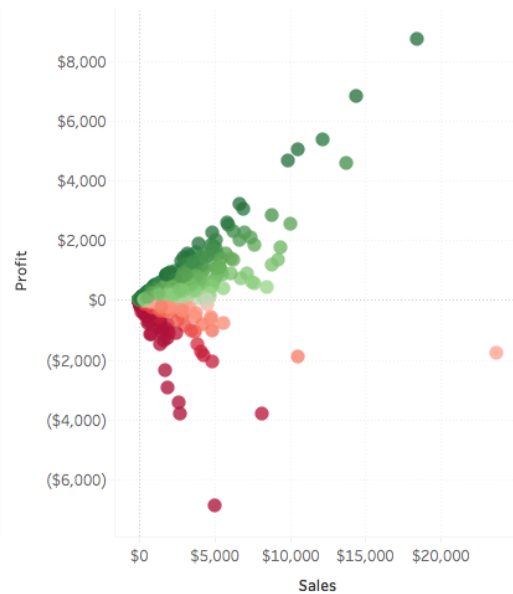
Customer Statistics

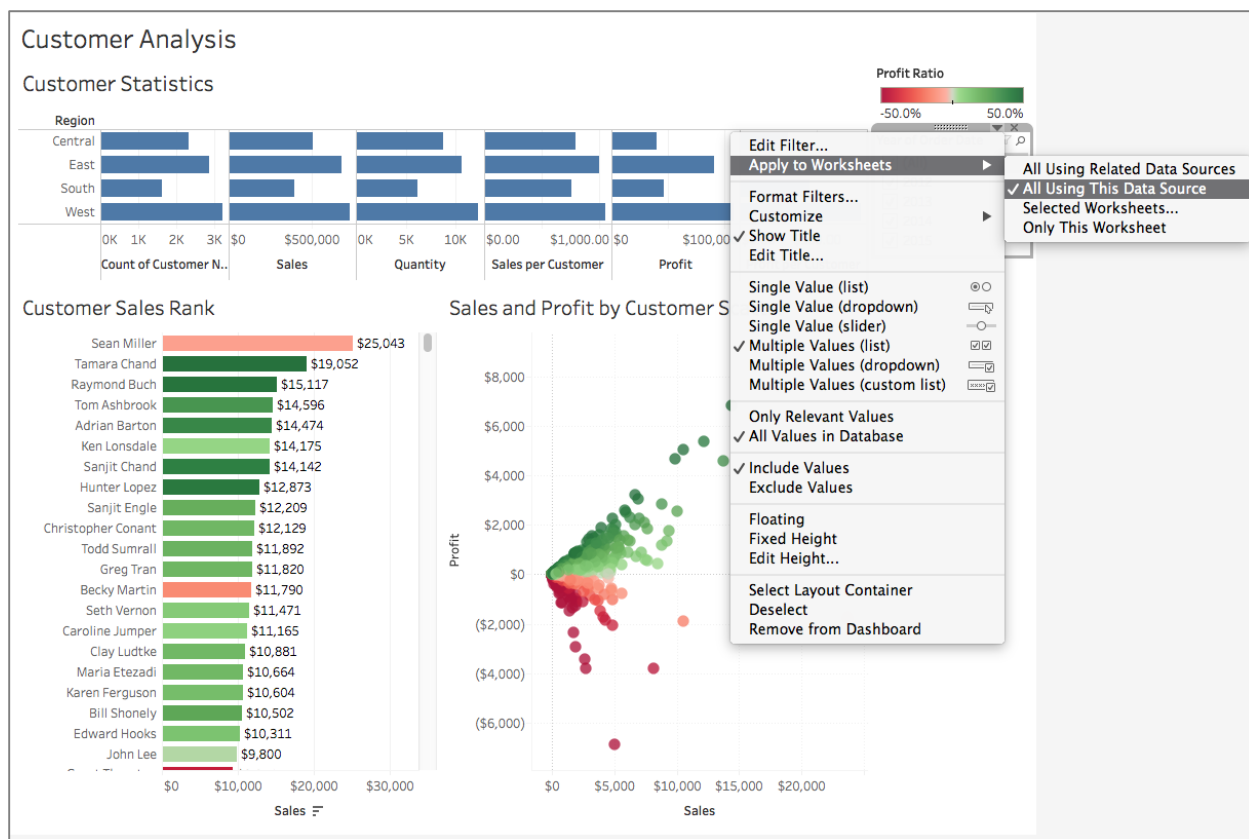


Customer Sales Rank



Sales and Profit by Customer Scatter





Step 10: Save your workbook as **Customer Analysis**.