**Steps for creating Sales Performance Analysis Project**

First Step: Adding data to Tableau

* Added 1st excel data file named **Sample - Superstore** (Primary data source).
* After adding the data file, in **data source** drag **Orders** Sheet to the **canvas** as this sheet contains necessary files required for our analysis.
* Go to **Sheet 1**, here click on **New Data Source** (Ctrl+D) and add 2nd excel data file named **Sales\_Target** (Secondary data source).

Second Step: Creating bullet chart using data blending

* In Sheet 1, Drag Dimension **Category** and Measure **Sales with sum aggregate** in **Columns**.
* Drag measure **Order Date (Months)** and measure **Segment** in **Rows**.

Here **Order Date (Months)** was selected by right-click hold Order Date and drag and releasing it in Rows and then selecting **#MONTH (Order Date)**.

* Using data blending, drag measure **Sales Target with sum aggregate** from Secondary data source to **Detail** in Mark card.

To color code, the chart to identify Categories and Segments that are above and below target we have to create a new calculated field.

* In Orders(Sample-superstore) our **Primary Data Source**, click on **Analysis** on **tools bar**.
* Then click on **Create a New Calculated Field**.
* A calculation box appears, **rename** it as **Sales above Budget?**

And in the calculation field write the formula as:

IF SUM([Sales])>SUM([Sales Target (Sales\_Target)].[Sales Target (Sales Target)])

THEN 'Above Target'

ELSE 'Below Target'

END

* After all the calculation is valid, click on **Apply** and then click on **OK**.

A new field is created named **Sales above Budget?**

* Drag this field, **Sales above Budget?** to **Color** in Marks card.

After adding **Sales above Budget?** to color, we see that on the right side of the chart we have a new legend created, were we have sum of sales above sum of target sales denoted as **Green color**, and the Sum of sales below the sum of target sales as **Red color**.

Third Step: Adding filter and formatting the chart

* Drag **Order Date** in **Filters** pane.

A Filter Field dialog box appears

* Select **#YEARS** and click on **Next**

In Filter Field, **General** tab select **Select from list** radio button and select **All**.

Click on **Apply** and click on **OK**.

* To display this Filter, in the right side of the chart right click on **YEAR (Order Date)** in **filters** pane and click on **Show Filter**.

Now we have almost every piece of puzzle, but our chart is still not bullet chart because we cannot see the target sales mark in our chart, to do that we have to **edit** our **reference line**.

* In Chart Right click on **Sales Axis** and Click on **Edit Reference line**, Edit Reference line dialog box appears

Click on **Line**, Select Per **Cell** in **Scope**

**In Line,**

**Values**, select **SUM (Sales Target) Average**

**Labels**, select **none**

**Tooltip**, select **Automatic**

Select **Line only**

**In Formatting,**

Select desired **Line** and click on **OK.**

Now, it looks like a Bullet chart, as we have Sales target, but this chart can be further improved by adding 60% 80% of Average Sales Target in chart.

* In Chart Right click on **Sales Axis** and Click on **Add Reference line**,

Reference line dialog box appears

Click on **Distribution**, Select **Per Cell** in **Scope**

**In Computation,**

**Value**, select **60%,80% of Average Sales Target (Sales Target)**

**Labels**, select **none**

**Tooltip**, select **Automatic**

**In Formatting,**

**Line**, select **none**

**Fill**, **Gray Light**

In **Checkbox**, select **Fill Above** & **Fill Below** and click on **OK.**

Now we have a bullet chart with all the given requirements, next we are going to create a Dashboard for this chart, before that we are going to rename this Sheet as **Sales Performance VS Target**.

Fourth Step: Creating Dashboard

* In **Dashboard** Sheet, **Size** of the Dashboard was set to **Automatic.**
* **Vertical Object** was added and **Distribute Contents Evenly** was selected.
* Drag **Sales Performance VS Target** Sheet in the **Canvas.**
* In the right side of the dashboard, legend and filter was added for end user can select one, more than one, or all years.

**The link for my project dashboard is**

https://public.tableau.com/profile/diptangshu.bhowmik#!/vizhome/SalesPerformanceAnalysisProject\_16176941093630/Dashboard

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