



# SALES & CUSTOMERS DASHBOARD

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# Sales Dashboard Requirement

## Dashboard Purpose

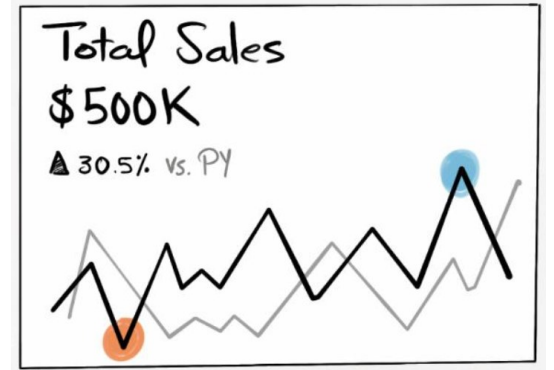
The purpose of sales dashboard is to present an overview of the sales metrics and trends in order to analyze year-over year sales performance and understand sales trends.

## KPI Overview

Display a summary of total sales, profits, and quantity for the current year and the previous year.

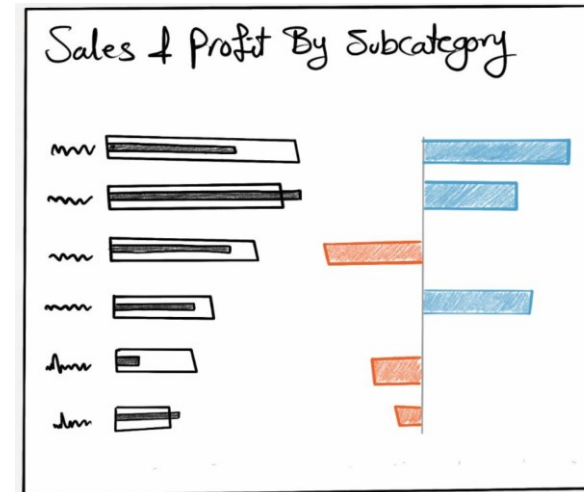
## Sales Trends

- Present the data for each KPI on a monthly basis for both the current year and the previous year.
- Identify months with highest and lowest sales and make them easy to recognize.



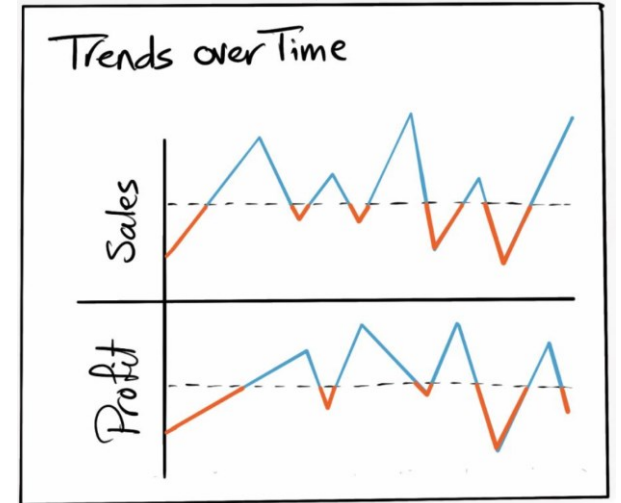
## Product Subcategory Comparison

- Compare sales performance by different product subcategories for the current year and the previous year.
- Include a comparison of sales with profit.



## Weekly Trends for Sales & Profit

- Present weekly sales and profit data for the current year.
- Display the average weekly values.
- Highlight weeks that are above and below the average to draw attention to sales & profit performance.



# Customers Dashboard Requirement

## Dashboard Purpose

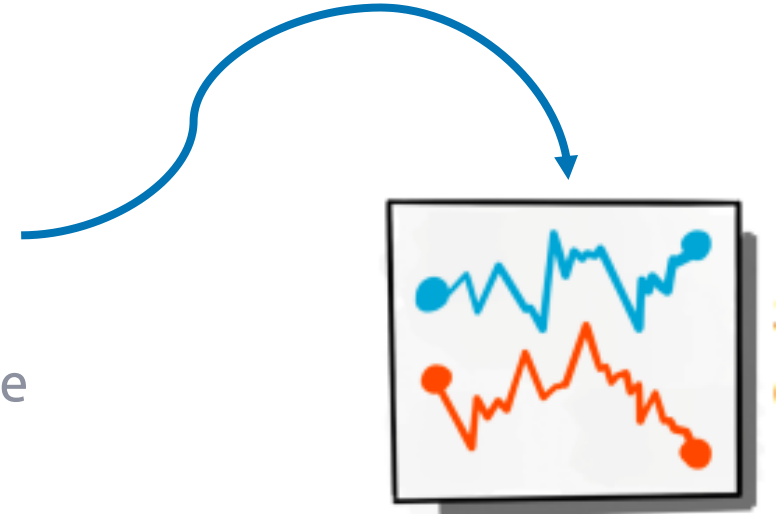
The customer dashboard aims to provide an overview of customer data, trends and behaviors. It will help marketing teams and management to understand customer segments and improve customer satisfaction.

## KPI Overview

Display a summary of total number of customers , total sales per customer and total number of orders for the current year and the previous year.

## Customer Trends

- Present the data for each KPI on a monthly basis for both the current year and the previous year.
- Identify months with highest and lowest sales and make them easy to recognize.



## Customer Distribution by Number of Orders

- Represent the distribution of customers based on the number of orders they have placed to provide insights into customer behavior, loyalty and engagement.



## Top 10 Customers by Profit

- Present the top 10 customers who have generated the highest profits for the company.
- Show additional information like rank, number of orders, current sales, current profit and the last order date.

Top 10 Customers by Profit

Rank	Customers	Last Order	2023 Profit	2023 Sales	Orders
#1	Raymond Buch	9/25/2023	\$6,781	\$14,203	3
#2	Hunter Lopez	11/17/2023	\$5,046	\$10,523	2
#3	Tom Ashbrook	10/22/2023	\$4,599	\$13,723	2
#4	Andy Reiter	12/24/2023	\$2,608	\$5,821	2
#5	Jane Waco	11/18/2023	\$1,953	\$5,385	4
#6	Helen Wasserman	9/4/2023	\$1,947	\$8,166	5
#7	Brian Moss	11/27/2023	\$1,938	\$5,683	5
#8	Alan Dominguez	12/1/2023	\$1,867	\$5,434	4
#9	Jim Epp	11/12/2023	\$1,704	\$4,074	4
#10	Steven Roelle	6/17/2023	\$1,676	\$3,506	1

# DATA MODEL

The screenshot displays the Tableau Desktop interface. On the left, the 'Connections' pane shows 'Customers' as a 'Text file'. The 'Files' pane lists 'Customers.csv', 'Location.csv', 'Orders.csv', and 'Products.csv'. A 'New Union' button is also visible. The main workspace shows a data model where 'Orders' is connected to 'Customers', 'Location', and 'Products'. Below the model, a dropdown menu shows 'Orders' with '24 fields 9994 rows'. To the right, a table displays data from the 'Orders' table. The table has columns: '#', 'Abc', 'Orders.csv', 'Orders.csv', 'Abc', and 'Abc'. The data rows show order details including Order ID, Order Date, Ship Date, Ship Mode, and Customer ID. At the bottom, a navigation bar shows various views and a user profile for 'Deni Ramdani'.

**Connections** Add

Customers  
Text file

**Files**

☐ Use Data Interpreter  
Data Interpreter might be able to clean your Text file workbook.

Customers.csv  
Location.csv  
Orders.csv  
Products.csv

New Union

New Table Extension

Sales DataSource

Filters  
0 | Add

Orders

Customers

Location

Products

Orders 24 fields 9994 rows 100 rows

#	Abc	Orders.csv	Orders.csv	Abc	Abc
Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID
1	CA-2022-152156	11/8/2022	11/11/2022	Second Class	CG-12520
2	CA-2022-152156	11/8/2022	11/11/2022	Second Class	CG-12520
3	CA-2022-138688	6/12/2022	6/16/2022	Second Class	DV-13045
4	US-2021-108966	10/11/2021	10/18/2021	Standard Class	SO-20335
5	US-2021-108966	10/11/2021	10/18/2021	Standard Class	SO-20335

**Name**  
Orders

**Fields**

Type	Field Name	Physical Table	Remote Field ...
#	Row ID	Orders.csv	Row ID

Data Source Weekly Trends Legend Subcategory Legend KPI KPI Orders KPI Customers KPI Sales per Customers Customer Distribution Top Customers Sales Dashboard Customer Dashboard Deni Ramdani





# Sales Dashboard | 2023



## Filter

Select Year  
2023

--PRODUCT--

Category  
All

Sub-Category  
All

--LOCATION--

City  
All

Region  
All

State  
All

2023 Sales vs. 2022 Sales ● Highest Month ● Lowest Month

Total Sales

**\$733K**

▲ 20.36% vs. PY

Total Profit

**\$93K**

▲ 14.24% vs. PY

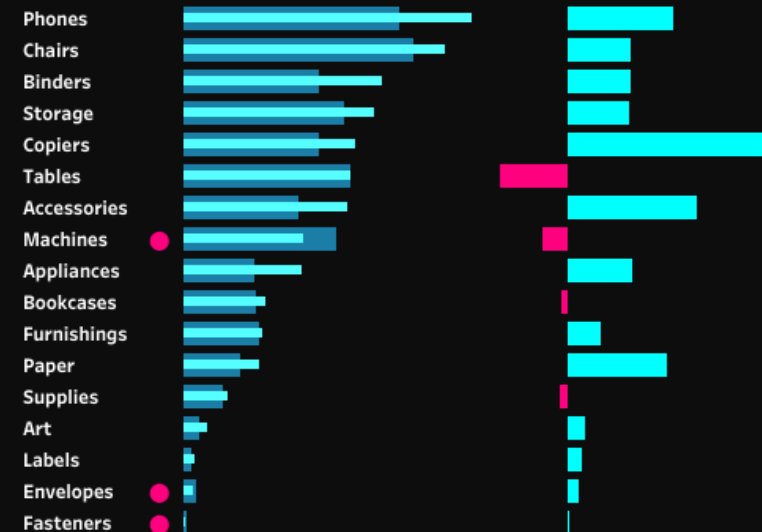
Total Quantity

**12.48K**

▲ 26.83% vs. PY

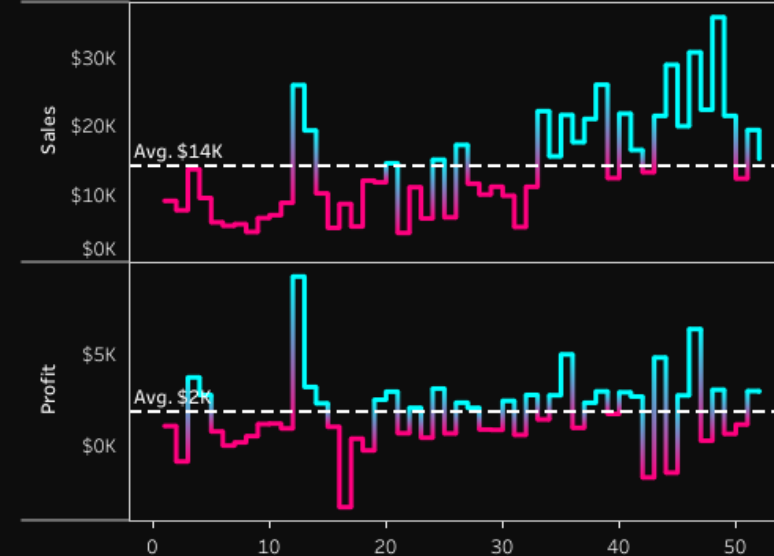
## Sales & Profit by Subcategory

2023 Sales vs. 2022 Sales



## Sales & Profit Trend Over Time

Profit ● Above ● Below





# Customers Dashboard | 2023



## Filters

2023 Sales vs. 2022 Sales ● Highest Month ● Lowest Month

Select Year  
2023

Total Customers

693

▲ 8.62% vs. PY

Total Sales per Customer

\$1K

▲ 10.80% vs. PY

Total Orders

1,687

▲ 28.29% vs. PY

-- PRODUCT --

Category  
All

Sub-Category  
All

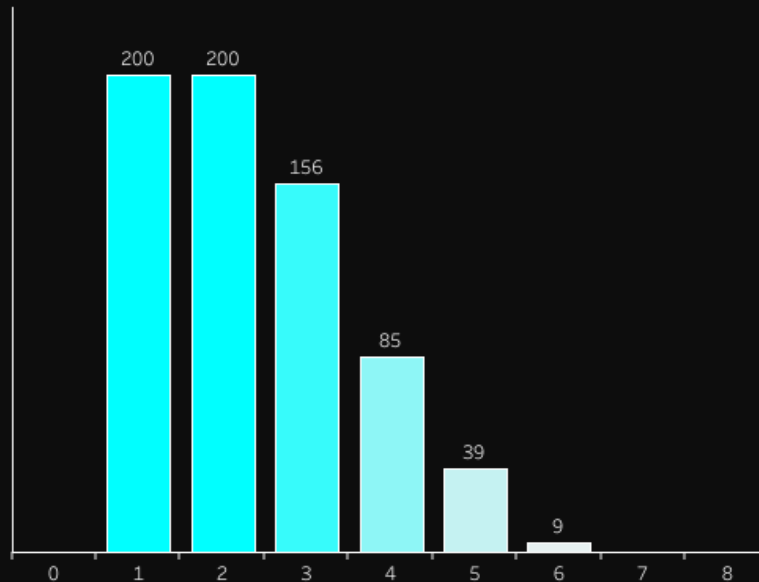
-- LOCATION --

City  
All

Region  
All

State  
All

## Customer Distribution



## Top 10 Customers by Profit

Rank	Customer Name	Last Order	2023 Sales	2023 Profit	Orders
#1	Raymond Buch	9/25/2023	\$14K	\$7K	3
#2	Tom Ashbrook	10/22/2023	\$14K	\$5K	2
#3	Hunter Lopez	11/17/2023	\$11K	\$5K	2
#4	Helen Wasserman	9/4/2023	\$8K	\$2K	5
#5	Andy Reiter	12/24/2023	\$6K	\$3K	2
#6	Brian Moss	11/27/2023	\$6K	\$2K	5
#7	Alan Dominguez	12/1/2023	\$5K	\$2K	4
#8	Jane Waco	11/18/2023	\$5K	\$2K	4
#9	Jim Epp	11/12/2023	\$4K	\$2K	4
#10	Steven Roelle	6/17/2023	\$4K	\$2K	1

# Thank You

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