



Title: Tableau Dashboard Project

Business Intelligence Case Study: Customer Churn Analysis

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June 21, 2025

Introduction

This project showcases the development of an **interactive business intelligence dashboard** in Tableau using the **Superstore dataset**. Designed with a focus on **data storytelling and decision support**, the dashboard empowers users to explore sales and profit performance across regions, products, and customer segments.

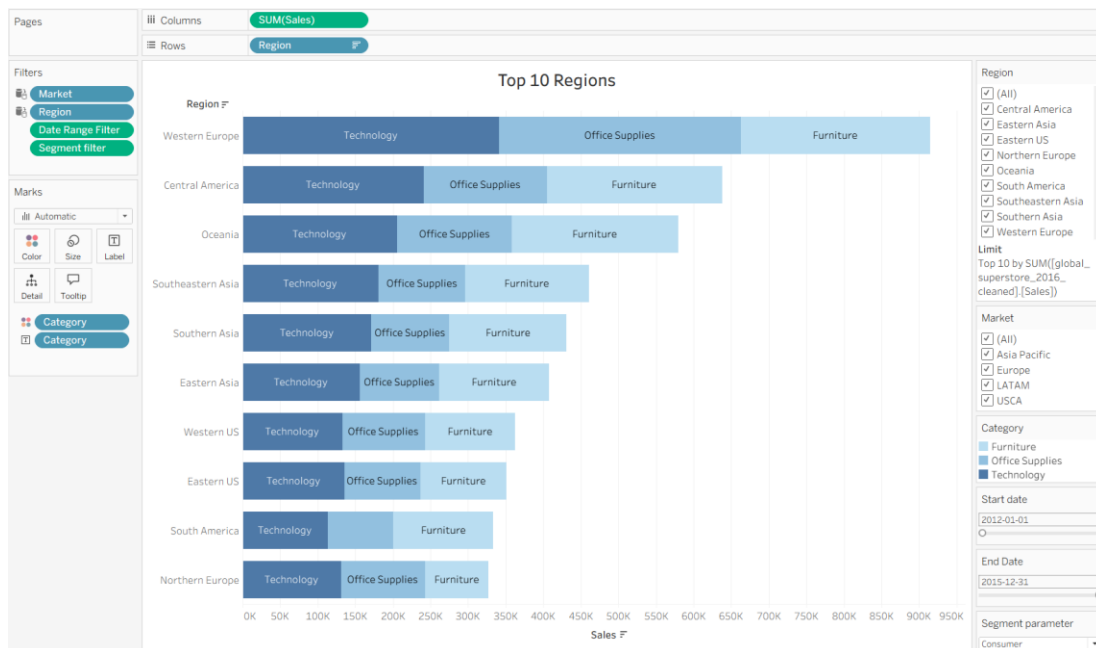
Key features include:

- **Six dynamic visualizations** (bar, line, bubble, scatter, treemap, and map).
- **Two date-range parameters** with calculated fields for custom time filtering.
- **One list-based parameter** for interactive segment analysis.
- A **unified dashboard** that allows executives and analysts to adjust filters and instantly see results.

This project demonstrates strong capabilities in **Tableau, business intelligence, and interactive reporting**. By integrating parameters and calculated fields, the dashboard goes beyond static visuals to deliver **self-service analytics** that support data-driven decision-making.

Different Plots and Filters

1. Top 10 Regions (Stacked Bar Plot)

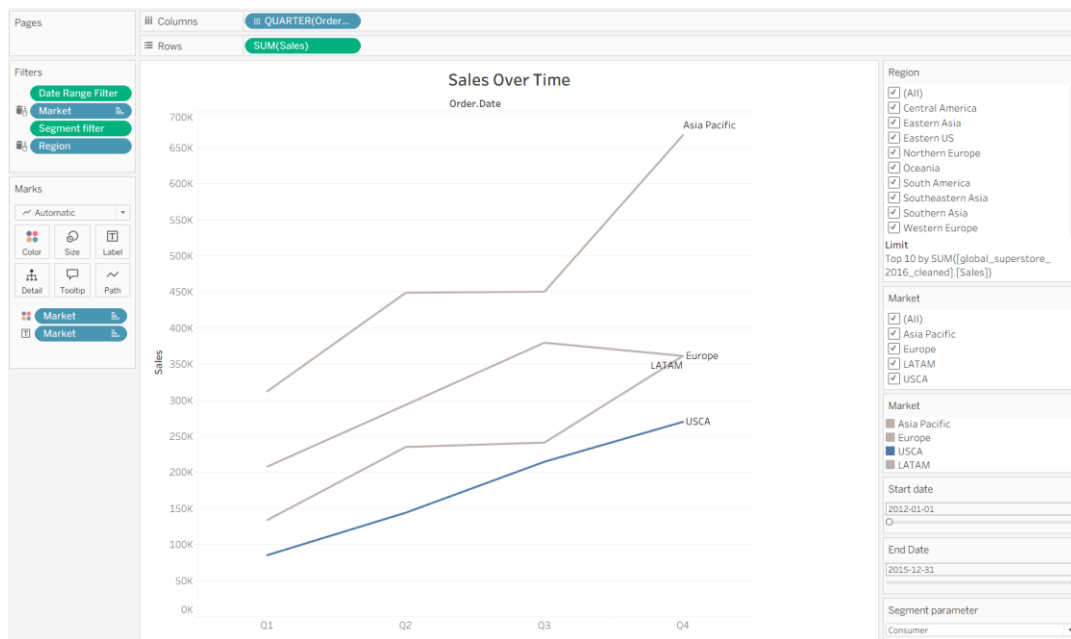


Plot Type: Horizontal stacked bar chart.

Filters Shown: Region, Market, Category, Start Date, End Date, Segment Parameter.

Functionality: Displays top regions by sales across categories.

2. Sales Over Time (Line Chart by Quarter)

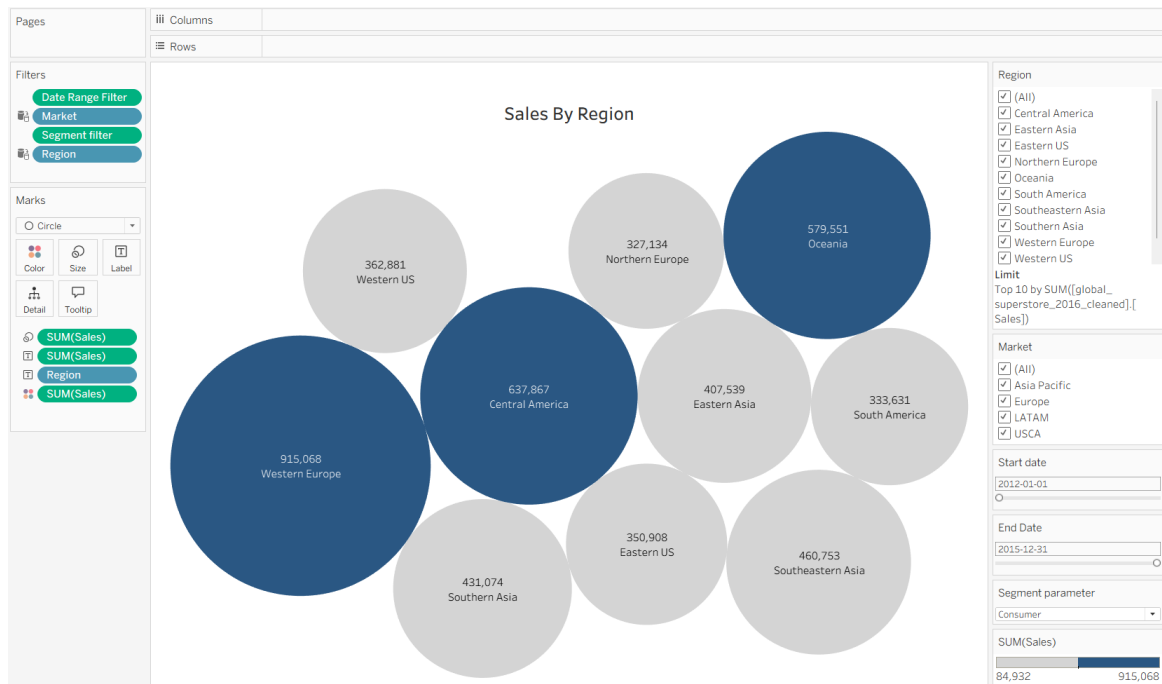


Plot Type: Line chart over quarterly periods.

Filters Shown: Date Range Filter, Market, Segment Filter, Region.

Functionality: Visualizes trend of sales across time and markets.

3. Sales by Region (Bubble Plot)

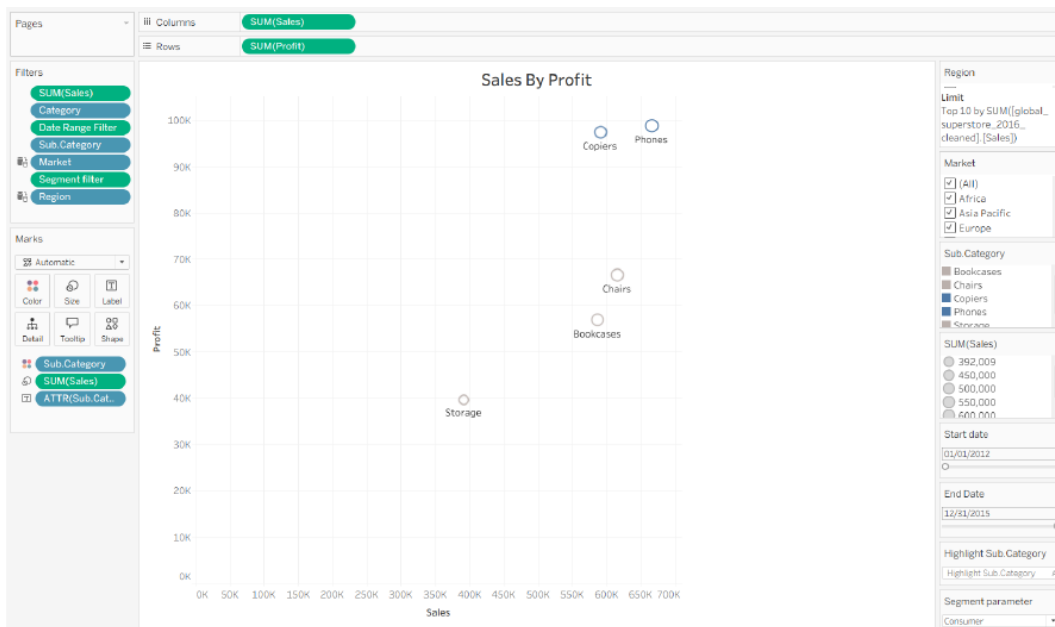


Plot Type: Packed bubbles.

Filters Shown: Date Range Filter, Market, Segment Filter, Region.

Functionality: Visual representation of sales volume by region.

4. Sales by Profit (Scatter Plot)

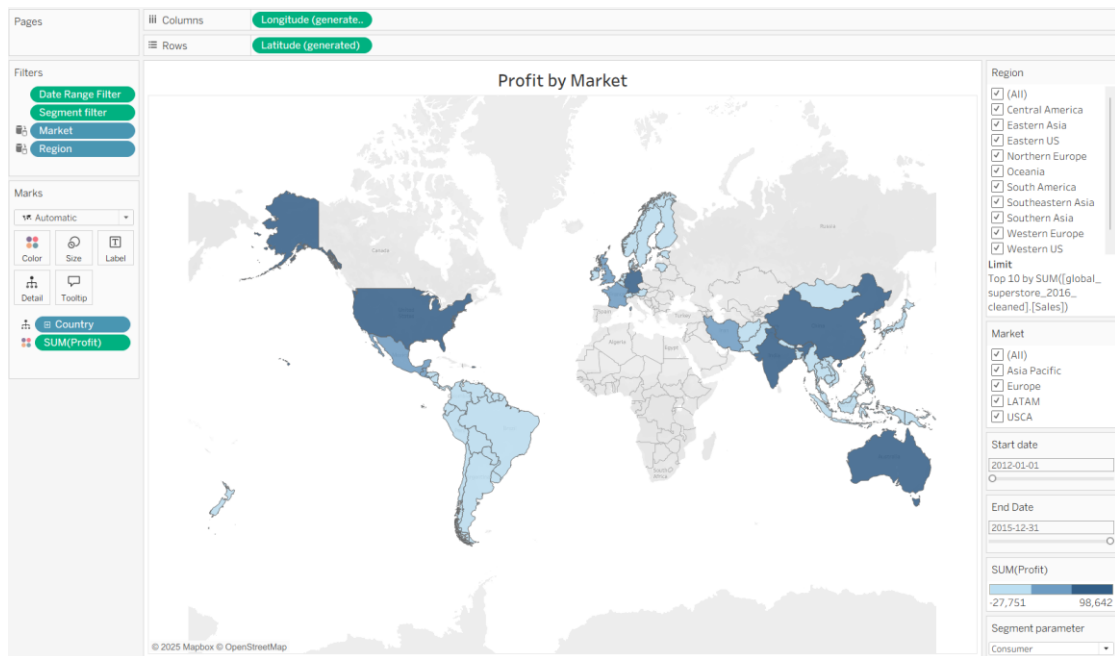


Plot Type: Scatter plot with Sub-Category shapes.

Filters Shown: Date Range Filter, Market, Region, Category, Segment Filter.

Functionality: Shows profit vs sales relationship by sub-categories.

5. Profit by Market (Map Visualization)

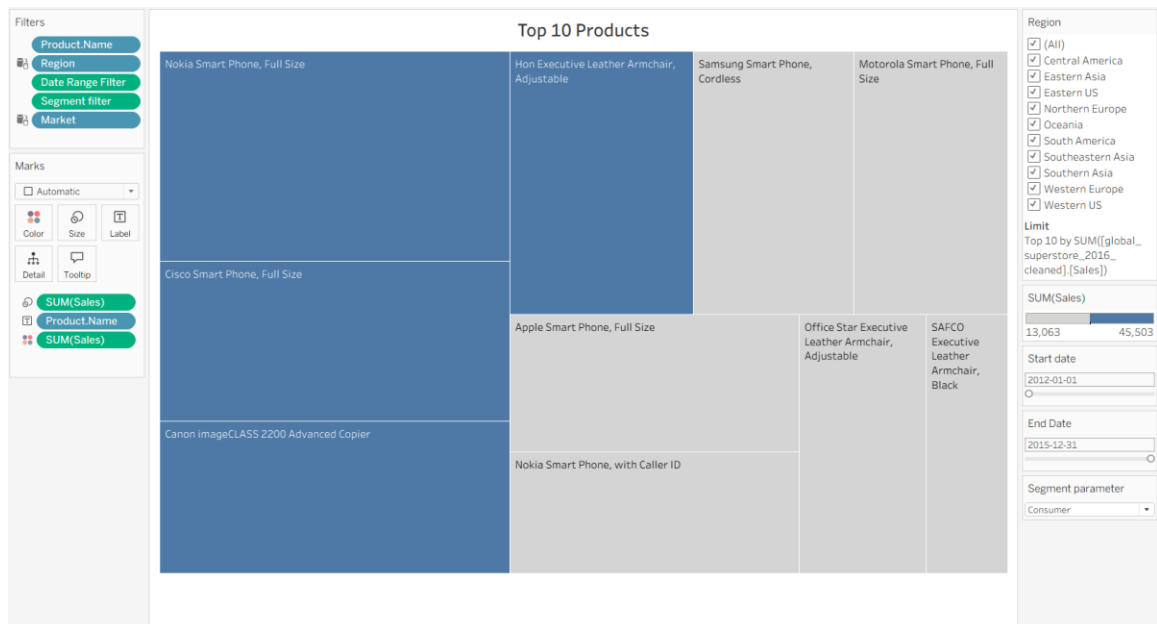


Plot Type: Filled map chart (geographic).

Filters Shown: Date Range Filter, Segment Filter, Market, Region.

Functionality: Indicates geographical variation in profit.

6. Top 10 Products (Treemap)



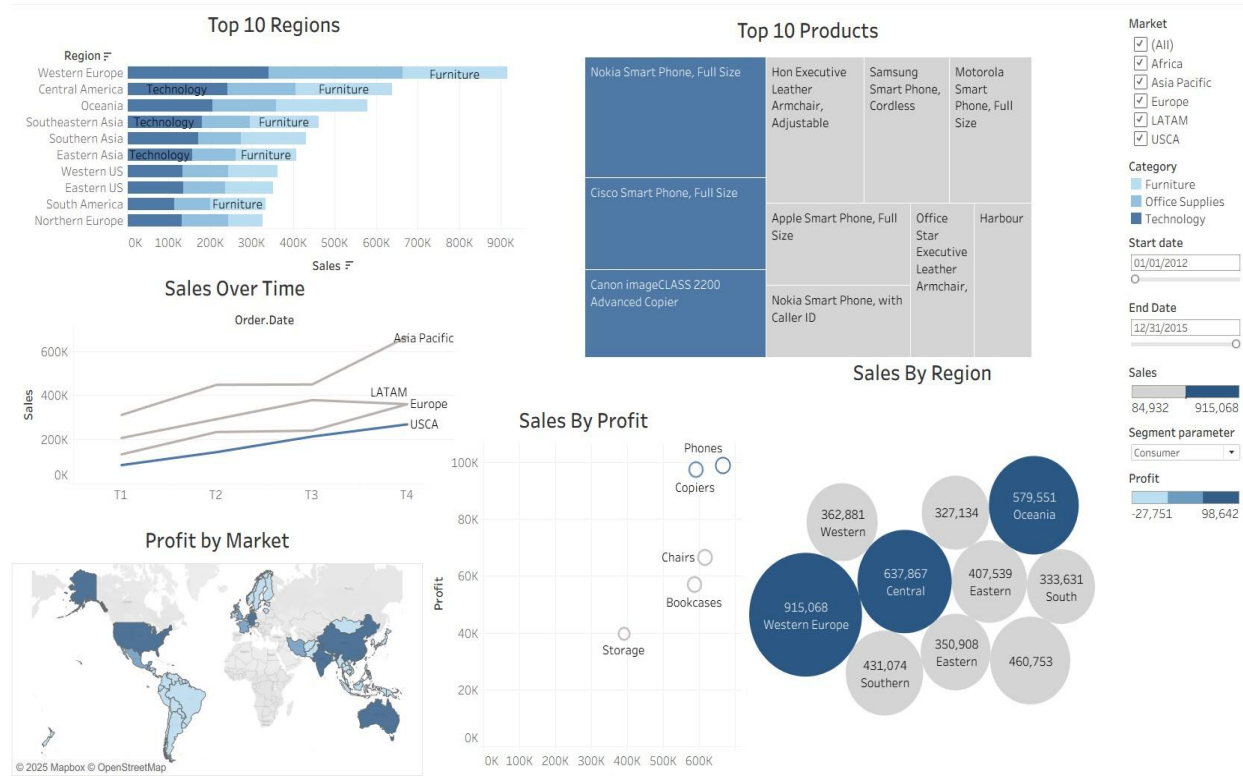
Plot Type: Treemap.

Filters Shown: Date Range Filter, Segment Filter, Market, Region.

Functionality: Displays highest selling products by name and sales value

Two Date-Oriented Range-Based Parameters and Calculated Field

Dashboard (visual 1): the start date and end date are from 1/1/2012 – 12/31/2015 and with consumer as segment parameter



Date Parameters Displayed:

- Start date: 01/01/2012
- End date: 12/31/2015

Parameter Controls are clearly shown on the right-hand panel.

Calculated Field Applied:

- Filters pane confirms its use in the individual sheet visuals as Date Range Filter.

Effect on Visualization:

- All plots in the dashboard (e.g., "Sales Over Time", "Profit by Market", etc.) are filtered according to the defined date range.
- This confirms that the calculated field linked to these parameters is effectively filtering data.

Start Date Parameter:

- **Data Type:** Date
- **Range:** 01/01/2012 to 12/31/2015
- **Current Value:** 12/16/2012
- Clearly shown with allowable range configured.

The screenshot shows the 'Edit Parameter [Start date]' dialog box. It has a title bar with a close button. The main area is divided into sections: 'Name' with a text box containing 'Start date'; 'Properties' with 'Data type' set to 'Date' and 'Display format' set to '12/16/2012'; 'Current value' set to '12/16/2012' and 'Value when workbook opens' set to 'Current value'; 'Allowable values' with radio buttons for 'All', 'List', and 'Range' (selected); 'Range of values' with 'Minimum' set to '01/01/2012' and 'Maximum' set to '12/31/2015'; and 'Step size' set to '1' with a unit dropdown set to 'Days'. There are 'Cancel' and 'OK' buttons at the bottom right.

End Date Parameter:

- **Data Type:** Date
- **Range:** 01/01/2012 to 12/31/2015
- **Current Value:** 01/29/2014
- Value when workbook opens: Based on the Start Date (linked to parameter).

Edit Parameter [End Date]

Name

End Date

Properties

Data type

Date

Display format

01/29/2014

Current value

01/29/2014

Value when workbook opens

Start date (Parameters)

Allowable values

☐ All
☐ List
☒ Range

Range of values

☒ Minimum
01/01/2012

☒ Maximum
12/31/2015

☐ Step size
1
Days

☒ Fixed
☐ When workbook opens

Add values from

Cancel

OK

Calculated fields

Date Range Filter → this is the calculated field lined to the parameters of **start date** and **end date**.

Date Range Filter

```

IF [Order.Date] >= [Start date] AND [Order.Date] <= [End Date] THEN 1
ELSE 0
END

```

The calculation is valid.

7 Dependencies

Apply

OK

One List-Based Parameters and Related Calculated Field

Edit Parameter [Segment parameter]

Name

Segment parameter

Properties

Data type

String

Display format

Consumer

Current value

Consumer

Value when workbook opens

Current value

Allowable values

☐ All

☒ List

☐ Range

Value	Display As
Consumer	Consumer
Corporate	Corporate
Home Office	Home Office
Click to add	

☒ Fixed

☐ When workbook opens

Add values from

Remove Selected

Cancel

OK

Segment Parameter (List-Based)

- **Type:** String
- **Values:** Consumer, Corporate, Home Office
- **Default:** Consumer
- Clearly configured using the “List” option

Segment Filter (Calculated Field)

- Segment filter → calculated field linked to the Segment parameter

Segment filter

IF [Segment] = [Segment parameter] THEN 1 ELSE 0 END

The calculation is valid. 7 Dependencies

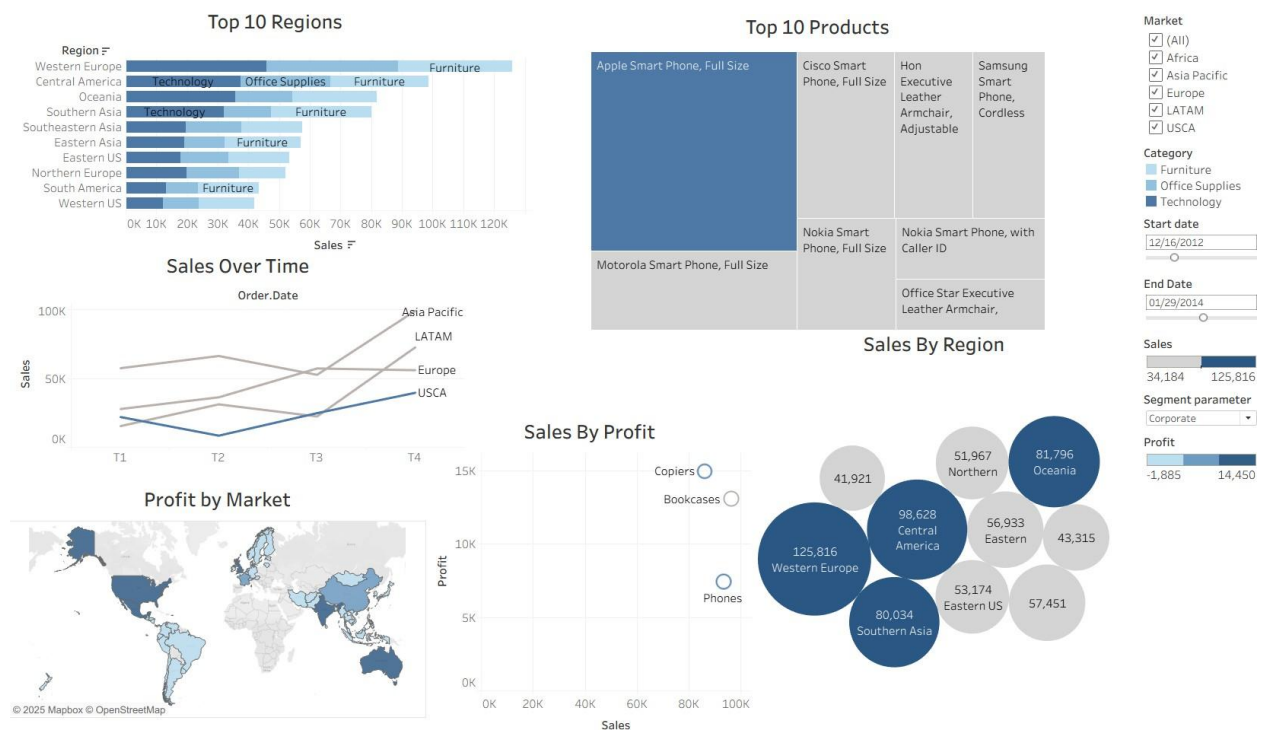
Apply

OK

Dashboard (visual 2)

In this visual, the only changes are in the start date and the end date AND in the segment parameter (corporate) → segment parameter is the drop-down menu

You can see the start date and end date in the visual



Start Date: 12/16/2012

End Date: 01/29/2014

Segment Parameter: *Corporate*

Result: Visual changes are clearly evident:

- Smaller sales and profit values.
- Different top-performing products and regions.
- All visuals reflect the narrower date range and new customer segment.

Conclusion

This project highlights the ability to create dynamic, user-driven dashboards in Tableau using the Superstore dataset. By integrating multiple chart types, date and segment-based filters, and calculated fields, it was developed successfully a comprehensive visualization tool. The result is a fully interactive dashboard that empowers users to explore sales and profit data through customized views, enhancing data-driven decision-making.

Reference

Tableau Software. (2024). *Tableau Desktop: Visual Analytics*. Retrieved from <https://www.tableau.com/>

Tableau Help. (2024). *Create Parameters*. Retrieved from https://help.tableau.com/current/pro/desktop/en-us/parameters_create.htm

Superstore Dataset. (n.d.). Sample data available in Tableau Desktop.