

Add a Join Step by Step Guide

1. Import Southern_Superstore file, add Southern_Region sheet and double-click to show the physical layer where you can create joins and unions.

The screenshot shows the Tableau Public interface. On the left, the 'Connections' pane lists 'South_Superstore' as a Microsoft Excel file. Below it, the 'Sheets' pane lists several sheets, including 'Southern_Region', which is highlighted with a red rectangle. The main workspace displays the title 'Southern_Region (South_Superstore)' and a message 'Need more data? Drag tables here to relate them. Learn more'. Below this, a data table is visible with columns: Row ID, Order ID, Order Date, Ship Date, Ship Mode, Customer ID, Customer Name, Segment, Country, City, State, Zip, and Region. The table contains several rows of data, including one for '7181' and others for '7475', '7476', '7477', and '7478'.

Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Zip	Region
7181	CA-2011-106054	1/6/2013	1/7/2013	First Class	JO-15145	Jack O'Briant	Corporate	United States	Athens	Georgia	30605	Sout
7475	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout
7476	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout
7477	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout
7478	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout

2. The following menu should now be available

The screenshot shows the Tableau Public interface. On the left, the 'Connections' pane lists 'South_Superstore' as a Microsoft Excel file. Below it, the 'Sheets' pane lists several sheets, including 'Southern_Region', which is highlighted. A dropdown menu is open for the 'Southern_Region' sheet, showing the options 'South_Superstore:' and 'Southern_Region'. The main workspace displays the title 'Southern_Region (South_Superstore)' and a message 'Southern_Region is made of 1 table. ⓘ'. Below this, a data table is visible with columns: Row ID, Order ID, Order Date, Ship Date, Ship Mode, Customer ID, Customer Name, Segment, Country, City, State, Zip, and Region. The table contains several rows of data, including one for '7181' and others for '7475', '7476', '7477', and '7478'.

Row ID	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	Country	City	State	Zip	Region
7181	CA-2011-106054	1/6/2013	1/7/2013	First Class	JO-15145	Jack O'Briant	Corporate	United States	Athens	Georgia	30605	Sout
7475	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout
7476	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout
7477	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout
7478	CA-2011-167199	1/6/2013	1/10/2013	Standard Class	ME-17320	Maria Etezadi	Home Office	United States	Henderson	Kentucky	42420	Sout

3. Drag the Rewards Customers sheet next to the Southern_Region

Tableau Public - Book1
File Data Window Help

Connections [Add](#)

South_Superstore
Microsoft Excel

Sheets

- More Returns
- New Southern_Region
- Returns
- Rewards Customers
- Southern_Region
- target
- New Union

Southern_Region+ (South_Superstore)

Southern_Region is made of 2 tables. ⓘ

Southern_Region Rewards Customers

Sort fields Data source order

Abc Abc # Abc Abc Abc

4. Click the circles between the 2 tables to open the join menu and check if they are being joined on the correct field

Tableau Public - Book1
File Data Window Help

Connections [Add](#)

South_Superstore
Microsoft Excel

Sheets

- More Returns
- New Southern_Region
- Returns
- Rewards Customers
- Southern_Region
- target
- New Union

Southern_Region+ (South_Superstore)

Southern_Region is made of 2 tables. ⓘ

Southern_Region Rewards Customers

Sort fields Data source order

Abc Abc # Abc Abc Abc

5. Make sure you have the following settings selected

Southern_Region is made of 2 tables. ⓘ

Southern_Region Rewards Customers

Join

Inner	Left	Right	Full Outer
Data Source		Rewards Customers	
Customer ID		=	Customer ID (Re...
Add new join clause			

South_Superstore: Rewards Customers

Sort fields Data source order

6. Now we can find the answer

The screenshot shows the Tableau Public interface with a workbook titled "Tableau Public - Book1". The left sidebar contains a "Connections" pane with "South_Superstore" (Microsoft Excel) and a "Sheets" pane with a list of worksheets: "More Returns", "New Southern_Region", "Returns", "Rewards Customers", "Southern_Region", "target", and "New Union". The main workspace displays a view titled "Southern_Region+ (South_Superstore)". A tooltip box is open, stating "Southern_Region is made of 2 tables." and showing a diagram of a union between "Southern_Region" and "Rewards Customers". Below the tooltip, the "Sort fields" dropdown is set to "Data source order". To the right, there are checkboxes for "Show aliases" and "Show hidden fields", and a red box highlights the "780" value next to the "rows" label.

Tableau Public - Book1

File Data Window Help

Connections Add

South_Superstore
Microsoft Excel

Sheets

- More Returns
- New Southern_Region
- Returns
- Rewards Customers
- Southern_Region
- target
- New Union

Southern_Region+ (South_Superstore)

Filters
0 Add

Southern_Region is made of 2 tables. ⓘ

Southern_Region Rewards Customers

Sort fields Data source order

Show aliases Show hidden fields 780 rows