**1. Open Tableau and Load the Data**

* Import the data into Tableau by clicking **Connect to Data and load Sales Cycle Dataset**.
* Drag the necessary fields into the Data pane for processing.

**2. Create Calculated Field**

**Field 1:** 1 Identify

* + Go to the **Analysis** tab and click **Create Calculated Field**.
  + Name it something like 1 Identify
  + Use the formula:

If ATTR([Status]) = 'Identify' or LOOKUP(ATTR([Status]),-1)='Identify' then SUM([Value]) END

**Field 2:** 2 Pursue

* + Go to the **Analysis** tab and click **Create Calculated Field**.
  + Name it something like 2 Pursue
  + Use the formula:

If ATTR([Status]) = 'Pursue' or LOOKUP(ATTR([Status]),-1)='Pursue' then SUM([Value]) END

**Field 3:** 3 Contact

* + Go to the **Analysis** tab and click **Create Calculated Field**.
  + Name it something like 3 Contact
  + Use the formula:

If ATTR([Status]) = 'Contact' or LOOKUP(ATTR([Status]),-1)='Contact' then SUM([Value]) END

**Field 4:** 4 Proposal

* + Go to the **Analysis** tab and click **Create Calculated Field**.
  + Name it something like 4 Proposal
  + Use the formula:

If ATTR([Status]) = 'Proposal' or LOOKUP(ATTR([Status]),-1)='Proposal' then SUM([Value]) END

**Field 5:** 5 Negotiation

* + Go to the **Analysis** tab and click **Create Calculated Field**.
  + Name it something like 5 Negotiation
  + Use the formula:

If ATTR([Status]) = 'Negotiation' or LOOKUP(ATTR([Status]),-1)='Negotiation'

then SUM([Value]) END

**Field 6:** 6 Won

* + Go to the **Analysis** tab and click **Create Calculated Field**.
  + Name it something like 6 Won
  + Use the formula:

If ATTR([Status]) = 'Won' or LOOKUP(ATTR([Status]),-1)='Won' then SUM([Value]) END

3. Drag Measure Values on to the Columns shelf and need to remove SUM (Number of Records)

and SUM(Value) out of Measure Values.

4. Drag Status field on to the Rows shelf.

5. Each of this Calculations under Measure Values we need to change the Compute Using -> Table(down)

6. Then Change Chart type to an Area Chart type we also just need to ensure if it’s not like that

all ready to take the Stack Marks and put them to off under the analysis menu option.

8. Drag Status field onto the Colors Shelf and then we can see that the order is not quite correct, so we’ll put identify at the top and then we’ll have pursue not just change the order they will pursue after we’ve got contact which is correct then we need proposal of the proposal comes Negotiation and last Won.

9.Hodling Ctrl Down Key from keyboard and taking the Measure Values and creating next to itself we then just do some magic with the axis: click on axis then Edit Axis -> Select Reversed Option. So in essence it will show from the maximum value to the minimum value and we’ve basically have the other half of the funnel.

10. We can just hide these labels we don’t need to see them right click on Axis -> Untick Show Header

11. Drag Division field onto the Filters & apply a filter by selecting All and right click on Filter -> Show Filter and then click dropdown on Legend -> Select Single Value (List).

12. Drag State field and Value filed on to the Label Shelf and then right click on Value Label Quick Table Calculation -> percent of total.

13. Just format label to be left and at the bottom and be well this also format Numbers-> Percentage -> 1 Decimal places.

