

Tableau - final project

File Data Server Window Help

Connections

- Regional_Sales Microsoft Excel

Sheets

- Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.
- Categories Sheet
- Customers Sheet
- Regions Sheet
- Sales Orders Sheet
- Sales Team Sheet
- Store Locations Sheet
- New Union
- New Table Extension

Sales Orders Sheet+ (Regional_Sales)

Connection: Live Extract Filters 0 Add

Sales Orders Sheet is made of 5 tables. ⓘ

```

graph LR
    SO[Sales Orders Sheet] --- CS[Categories Sheet]
    SO --- CS2[Customers Sheet]
    SO --- SL[Store Locations Sheet]
    SL --- RS[Regions Sheet]
    
```

Sales Orders Sheet 48 fields 7983 rows

Name	Type	Field Name	Physical Table	Remote...
Sales Orders Sheet	Abc	Sales Orders Sheet	Sales Orders Sheet	Sales Orders Sheet
Order Number	Abc	Sales Channel	Sales Orders Sheet	Sales Orders Sheet
SO - 0001877	Distributor	WARE-PUJ1005	12/26/2018	1/1
SO - 0003704	Online	WARE-UHY1004	7/29/2019	8/
SO - 0004064	In-Store	WARE-XYS1001	9/12/2019	9/

Data Source

Profit by Region by Category by ... Category Difference by Year: Mi... Profit by Year: Michael Micek Profit by Category: Michael Micek Average Sale and Profit by Cate... Quantity VS Profit

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File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Data Analytics

Sales Orders Sheet+ (Reg...

Pages

Filters

Region Profit Running Total Per Year

Category	Region	Order Date		
		2018	2019	2020
Equipment	Midwest	\$55,300.86	\$105,258.54	\$138,609.47
	Northeast	\$8,838.84	\$22,201.32	\$57,559.03
	South	\$32,449.78	\$117,671.97	\$142,038.39
	West	\$48,270.75	\$130,125.26	\$217,486.82
Bakeware	Midwest	\$39,563.37	\$98,838.87	\$138,851.27
	Northeast	\$14,859.53	\$35,993.67	\$94,702.82
	South	\$39,498.78	\$88,018.50	\$132,101.96
	West	\$38,194.69	\$104,014.89	\$202,398.50
Baseball Tech	Midwest	\$17,543.75	\$68,882.50	\$142,493.92
	Northeast	\$2,472.70	\$54,322.93	\$68,060.48
	South	\$65,721.17	\$139,103.86	\$228,515.16
	West	\$51,982.49	\$131,993.75	\$176,128.39
Basketball Tech	Midwest	\$62,265.11	\$108,178.20	\$142,931.17
	Northeast	\$5,193.84	\$17,606.93	\$43,124.82

Caption

Analysis: This text table provides an insight into the running profit total by region by category by year. It allows me to see the year over year cumulative total for each category in each region, allowing me to identify what categories do well in which regions. It also shows me that many regions in our market are profitable.

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Data Analytics

Sales Orders Sheet+ (Reg...)

Search

Tables

- Discount Applied
- Order Quantity
- Unit Cost
- Unit Price
- Store Locations Sheet**
- Average Cost
- Average Sale
- Compared to AVG Profit
- Cost to Sales Ratio
- Metric Selection
- Most Profitable Filter
- Profit
- Profit Per Sale
- Region Profit
- Total Order Amount
- Total Order Cost

Parameters

- Category Selection.p
- Metric Selection.p
- State Selection.p

Pages

iii Columns **YEAR(Order Date)**

Rows **Category**

Filters

Marks

Automatic

Color Size Text

Detail Tooltip

SUM(Profit)

Category	2018	2019	2020
Audio Equipment	\$85,536.62	\$49,960.23	
Bakeware	\$62,633.21	\$46,239.05	
Baseball Tech	\$118,862.82	\$35,688.02	
Basketball Tech	\$80,714.97	\$52,468.04	
Bedroom Furnitu...	\$85,865.53	\$27,300.56	
Bedroom Tech	\$236,085.76	\$110,666.31	
Candleholders	\$150,127.44	\$95,051.96	
Candles	\$111,625.01	\$6,146.25	
Car Accessories	\$149,904.86	\$31,308.23	
Construction	\$57,332.77	\$102,775.45	
Cookware	\$65,365.27	\$624.51	
Desktop Comput...	\$63,230.51	\$28,619.38	
Dining Furniture	\$57,642.04	\$29,284.63	
Executive Office	\$67,961.45	\$65,833.73	

Category Difference By Year

Chart Type: Text Table

Dual Axis: N

Reference Line: N

Trend Line: N

Calculated Fields: 1[Profit]

Table Calculations: Difference, Across

LOD Calculations: 0

Mark Cards: 1

Filters: 0

Visualization: Matching color for table title, calculated across table for profit difference year over year.

Analysis: This text table provides an insight into the difference in yearly profit by category. It allows us to identify what categories are turning a profit year over year.

Data Source Profit by Region by Category by ... Category Difference by Year: ... Profit by Year: Michael Micek Profit by Category: Michael Micek Average Sale and Profit by Cate... Quantity VS Profit

141 marks 47 rows by 3 columns Difference in SUM(Profit): \$4,761,637.27

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Sales Orders Sheet+ (Reg...)

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Parameters

- Category Selection.p
- Metric Selection.p
- State Selection.p

Pages

iii Columns **YEAR(Order Date)**

Rows **SUM(Profit)**

Filters

Marks

Automatic

Color Size Label

Detail Tooltip Path

SUM(Profit)

Profit by Year

Year of Order Date

Profit

2018 2019 2020

Chart Type: Line

Dual Axis: N

Reference Line: N

Trend Line: N

Calculated Fields: N

Table Calculations: N

LOD Calculations: 0

Mark Cards: Label for profit for each year

Filters: 0

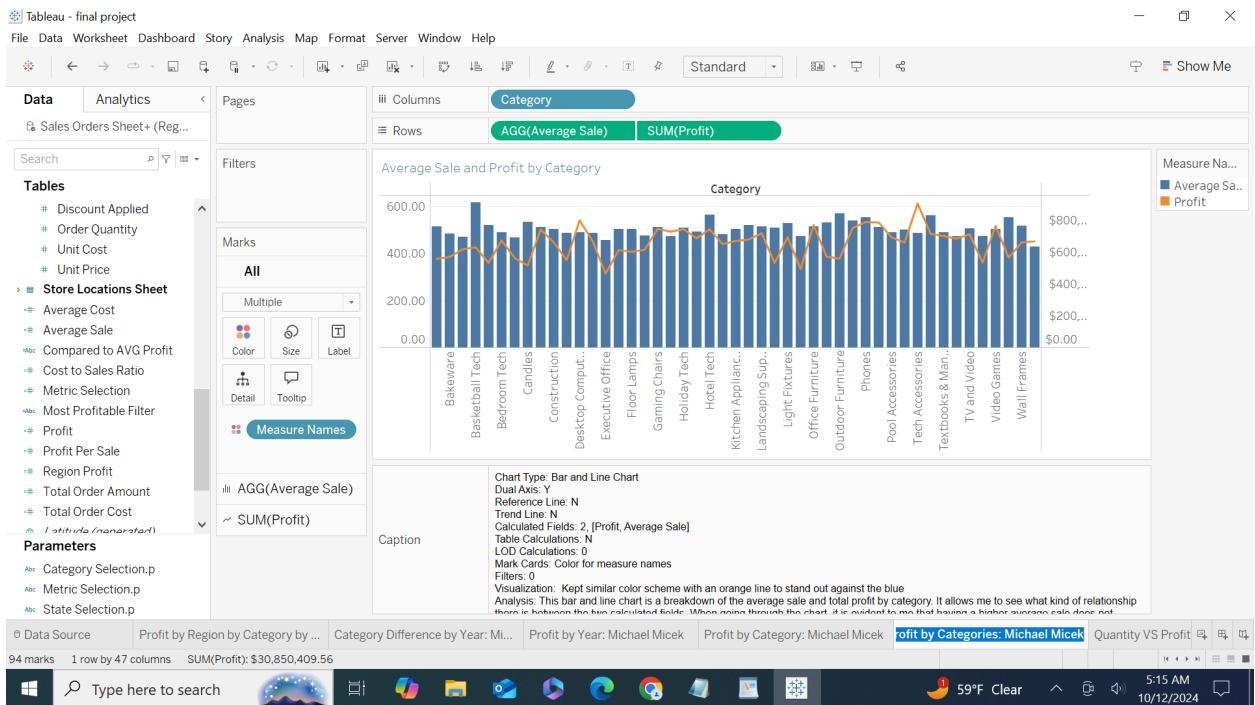
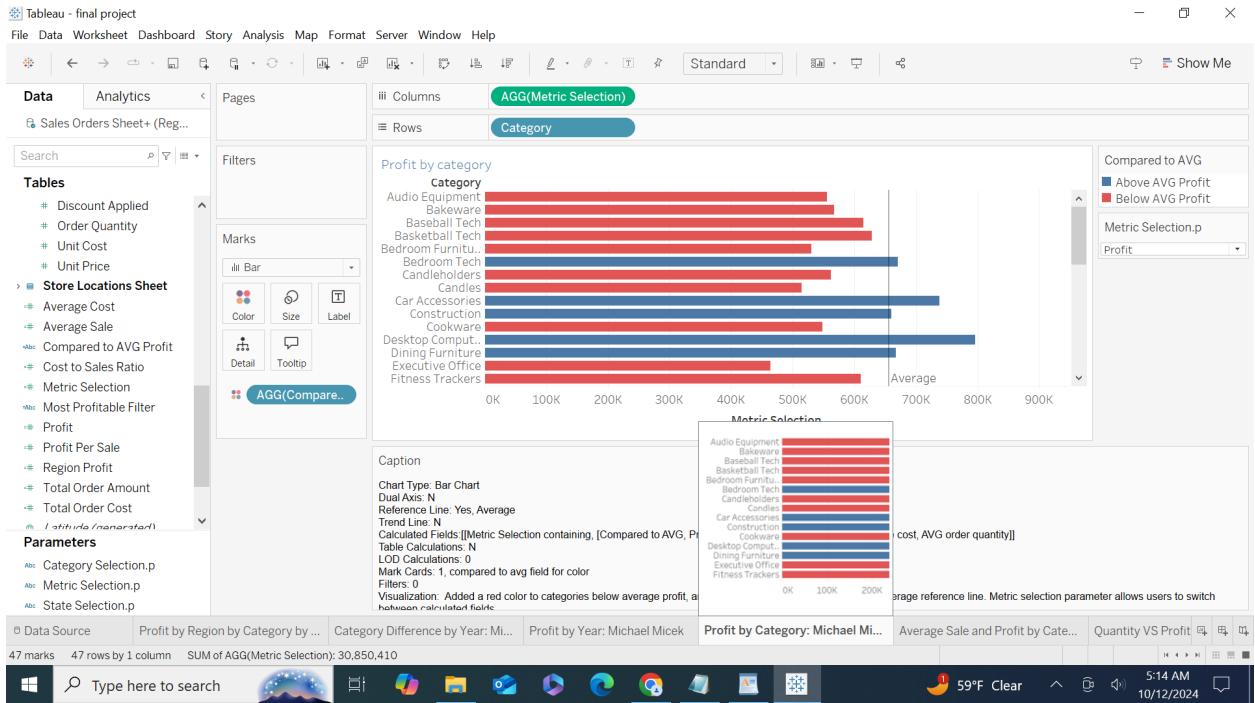
Visualization: Kept color scheme, added labels for profit for each year.

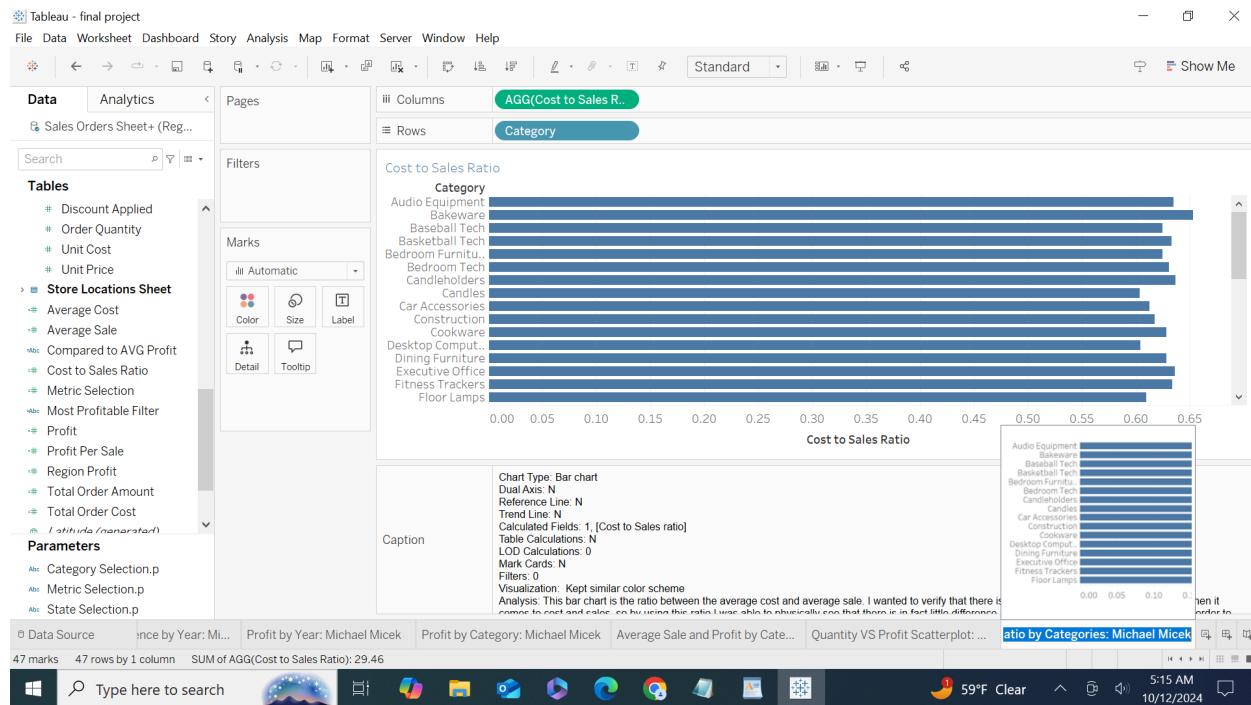
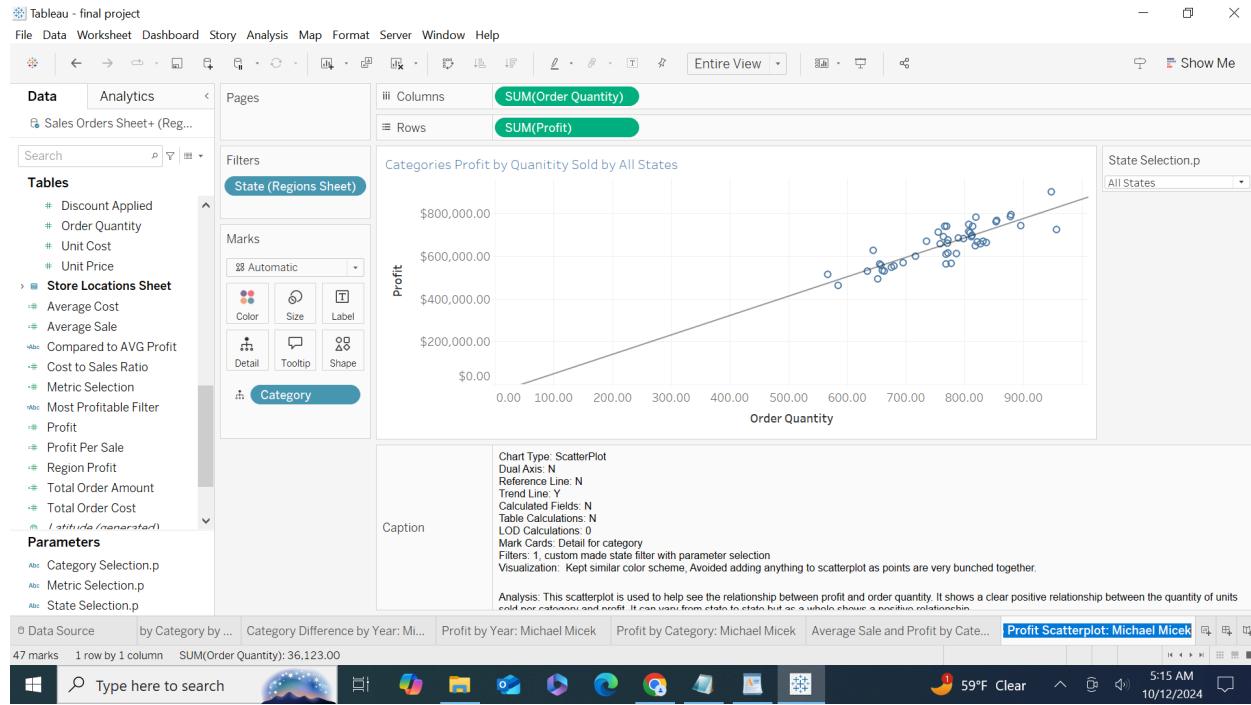
Analysis: This line chart allows us to view what the companies profit was year by year, and shows us that after massive growth between 2018 and 2019, that growth has been reduced between 2019 and 2020. We can now start investigating factors that affect profit and also run who profit changed between 2019 and 2020.

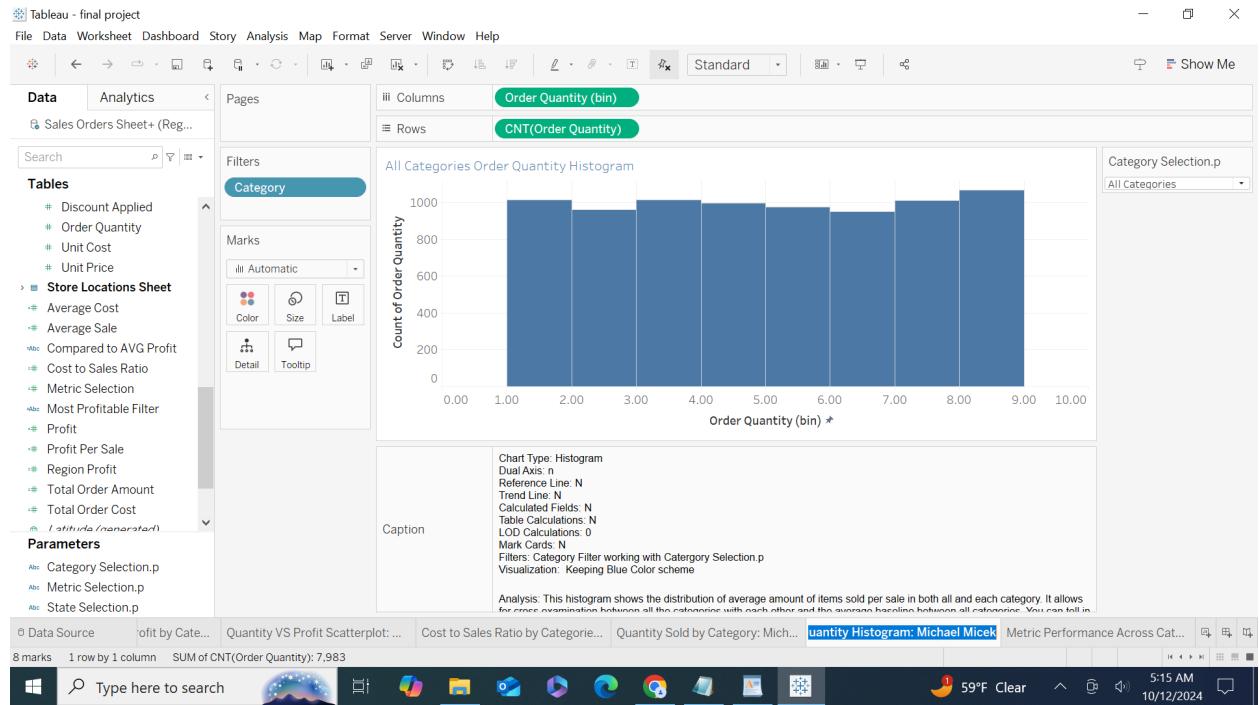
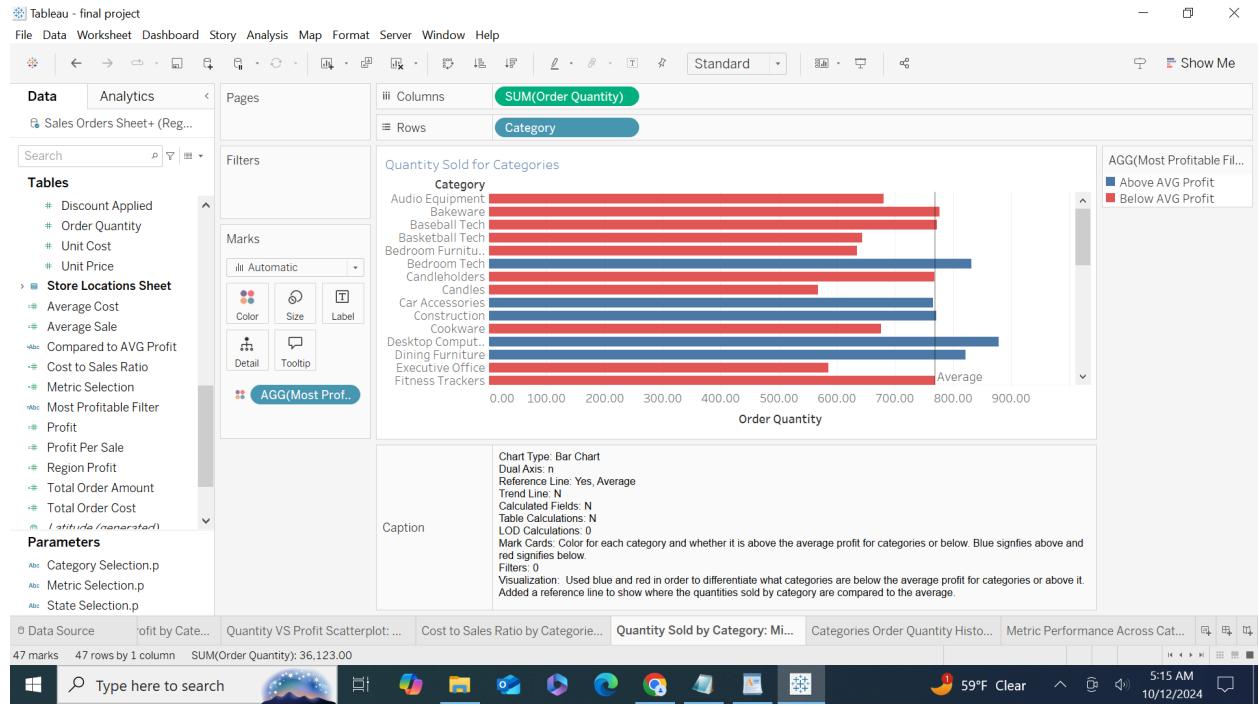
Data Source Profit by Region by Category by ... Category Difference by Year: Mi... Profit by Year: Michael Micek Profit by Category: Michael Micek Average Sale and Profit by Cate... Quantity VS Profit

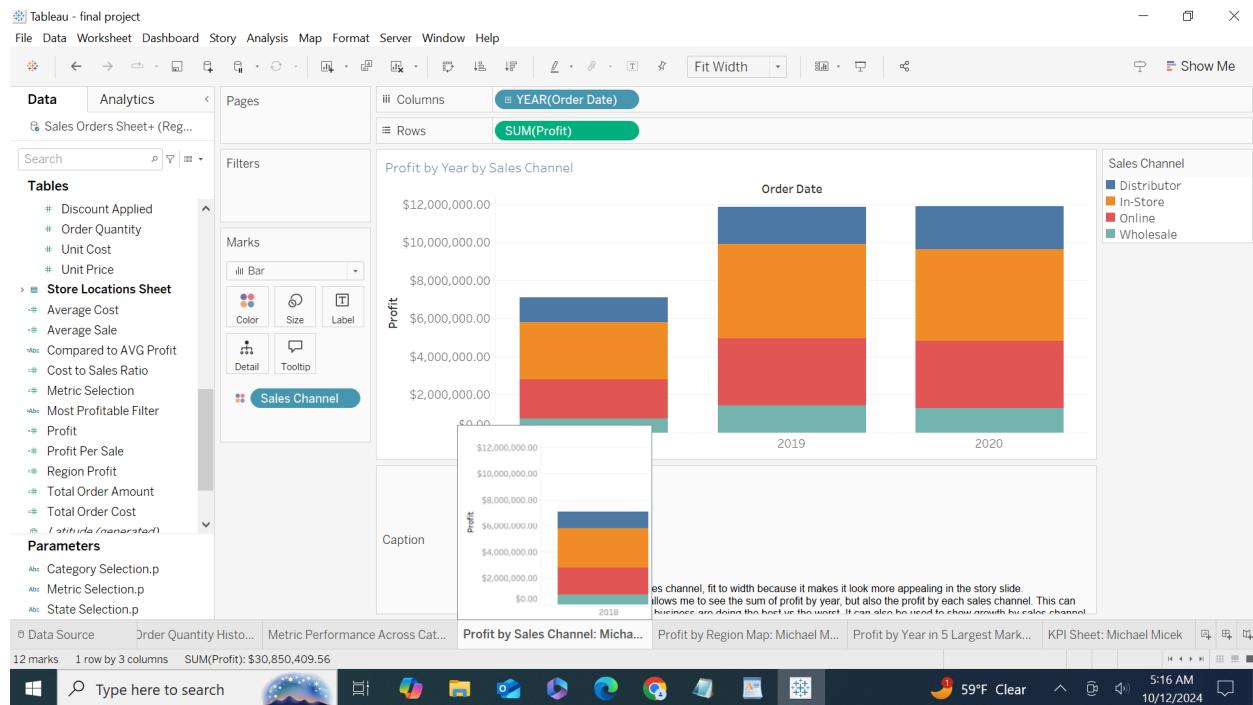
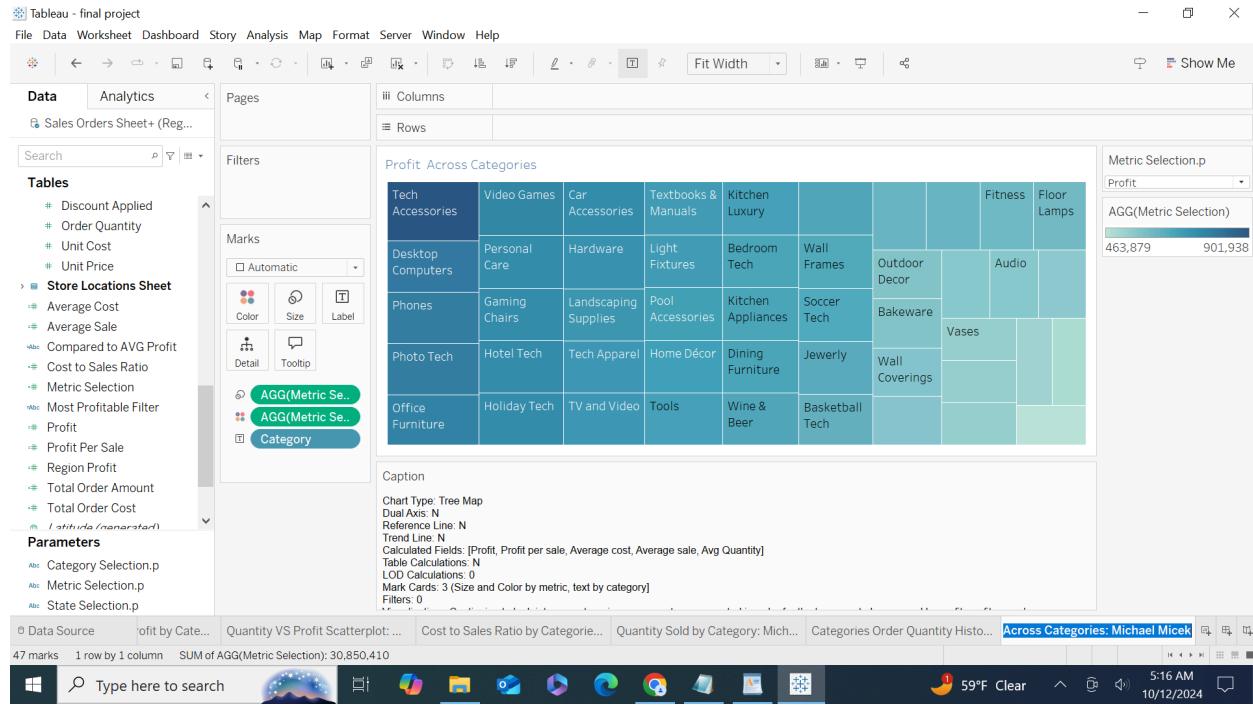
3 marks 1 row by 1 column SUM(Profit): \$30,850,409.56

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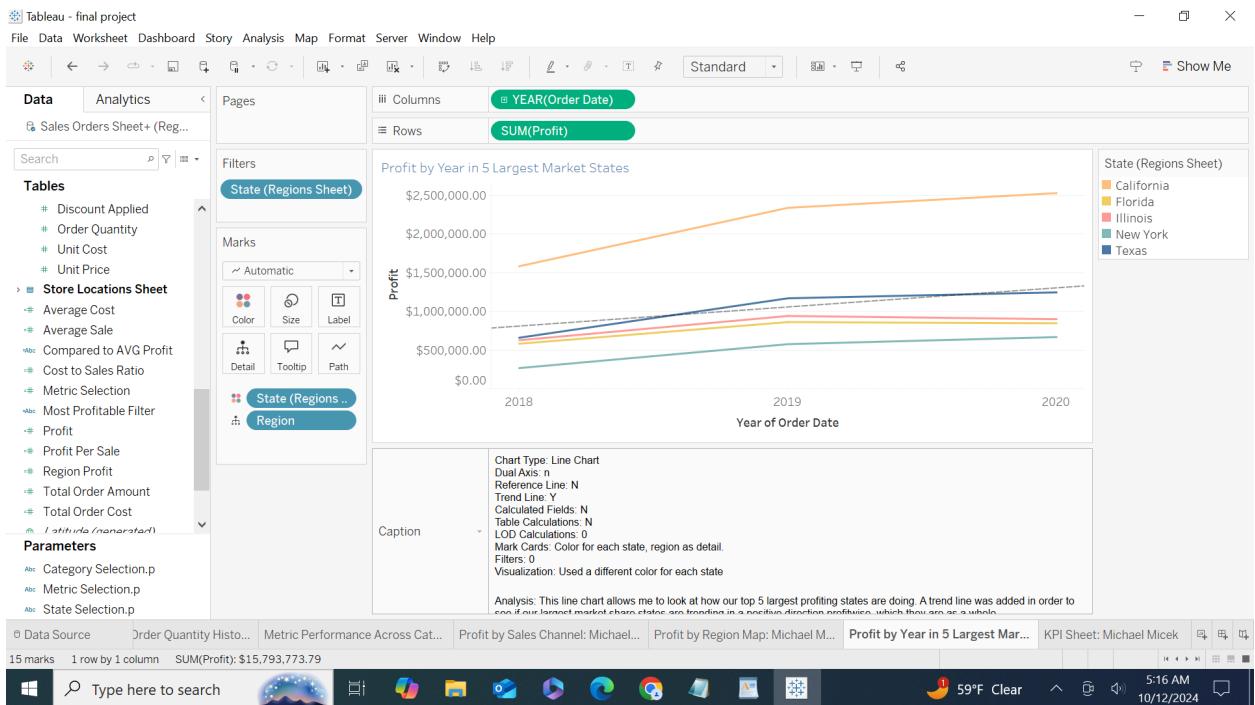
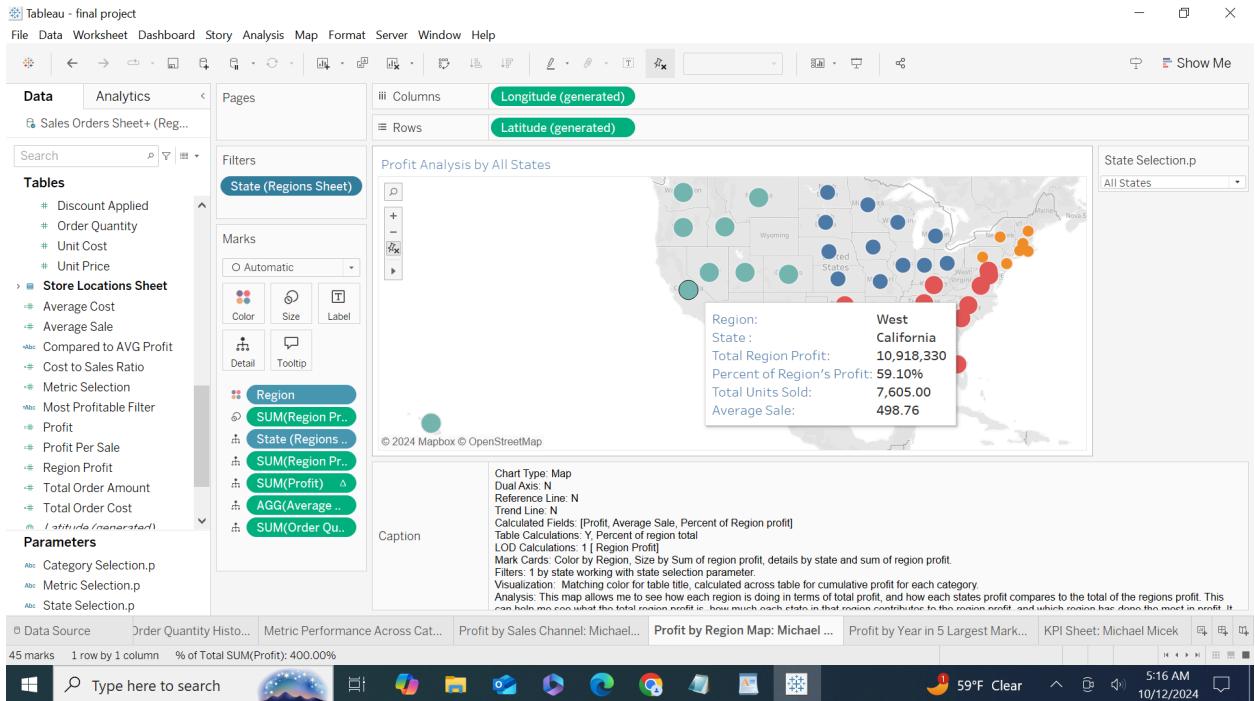


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File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Fit Width Show Me

Data Analytics

Sales Orders Sheet+ (Reg...)

Search

Tables

- # Discount Applied
- # Order Quantity
- # Unit Cost
- # Unit Price
- > **Store Locations Sheet**
 - # Average Cost
 - # Average Sale
 - Compared to AVG Profit
 - Cost to Sales Ratio
 - Metric Selection
 - Most Profitable Filter
 - Profit
 - Profit Per Sale
 - Region Profit
 - Total Order Amount
 - Total Order Cost
- > Latitude (generated)

Parameters

- Category Selection.p
- Metric Selection.p
- State Selection.p

Pages

Measure Names

Rows

KPIs

Average Cost	Average Sale	Profit Per Sale	Cost to Sales Ratio	Avg. Order Quantity
316.47	504.94	188.47	0.63	4.52

Marks

Automatic

Color, Size, Text, Detail, Tooltip

Measure Values

AGG(Average Cost), AGG(Average Sale), AGG(Profit Per Sale), AGG(Cost to Sales R...), AGG(Order Quantity)

Measure Values

5 marks 1 row by 5 columns SUM of Measure Values: 1,015.0

Type here to search

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File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Fit Width Show Me

Dashboard Layout

Default Phone Device Preview

Size

Custom size (1100 x 800)

Sheets

- Profit by ...
- Average Sale ...
- Quantity VS ...
- Cost to Sales ...
- Quantity Sold ...

Objects

- Web Page
- Navigation
- Download
- Add Filters
- Einstein Discovery

Tiled Floating

KPIs

Average Cost	Average Sale	Profit Per Sale	Cost to Sales Ratio	Avg. Order Quantity
316.47	504.94	188.47	0.63	4.52

Profit by category

Category

Average

Metric Selection.p

Compared to AVG

Profit

Below AVG Profit

State Selection.p

All States

Region Profit Running Total Per Year

Category	Region	2018	2019	2020
Audio Equipment	Midwest	\$55,300.86	\$105,258.54	\$138,609.47
	Northeast	\$8,838.84	\$22,201.32	\$57,559.03
	South	\$32,449.78	\$117,671.97	\$142,038.39
	West	\$48,270.75	\$130,125.26	\$217,486.82
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	Northeast	\$14,859.53	\$35,993.67	\$94,702.82
	South	\$39,498.78	\$88,018.50	\$132,101.96
	West	\$38,194.69	\$104,014.89	\$202,198.50

Categories Profit by Quantity Sold by All States

Profit

Order Quantity

Data Source Performance Across Cat... Profit by Sales Channel: Michael... Profit by Region Map: Michael M... Profit by Year in 5 Largest Mark... KPI Sheet: Michael Micek Profit Analysis Dashboard:M... Type here to search 5:17 AM 10/12/2024

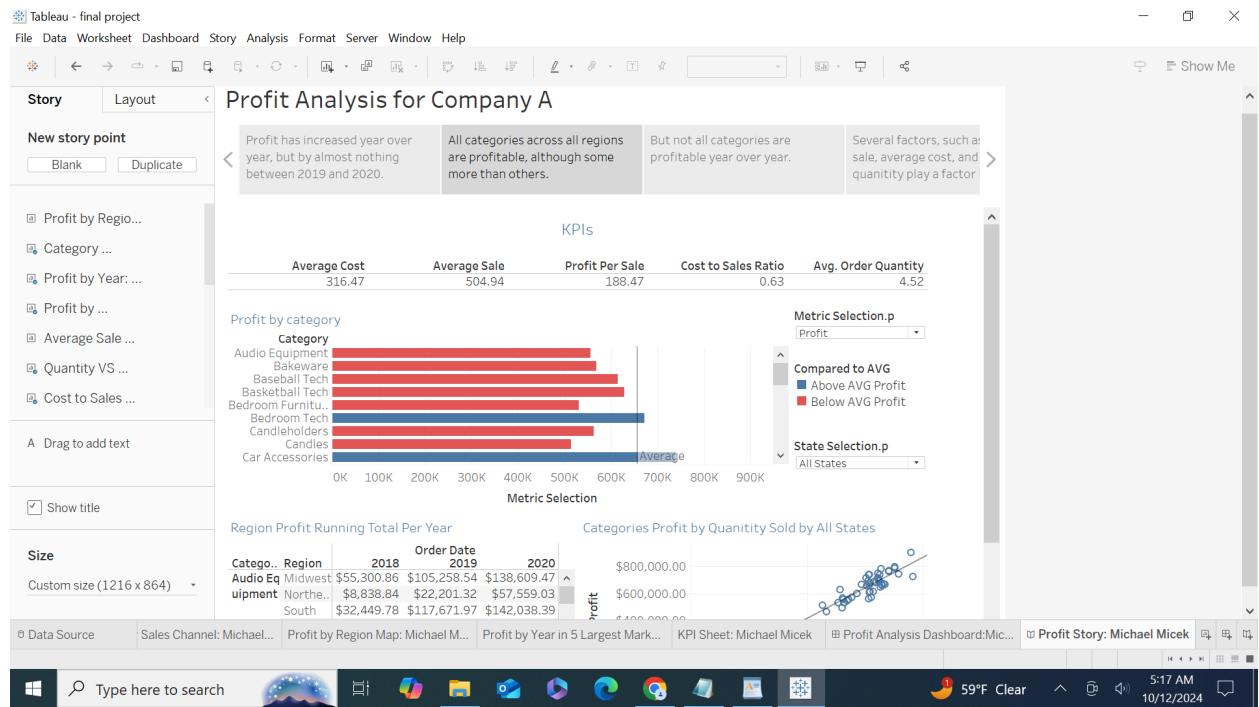
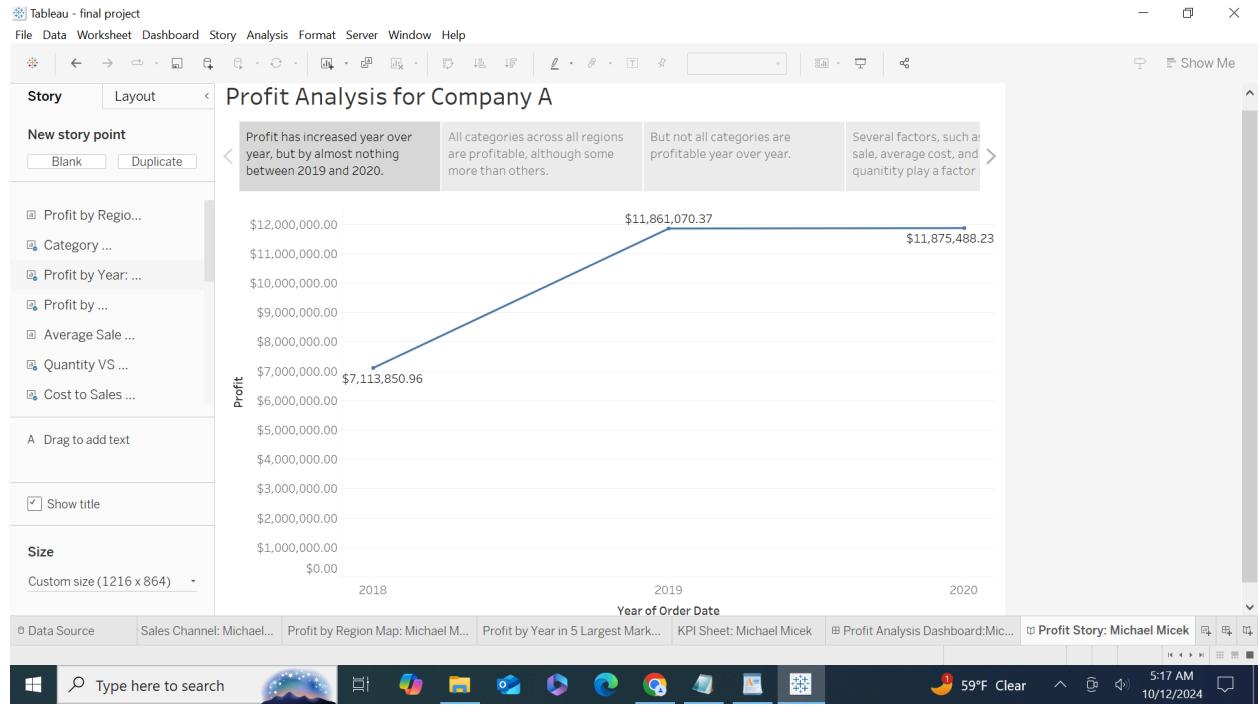


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File Data Worksheet Dashboard Story Analysis Format Server Window Help

Story Layout

New story point

- Blank Duplicate

Profit Analysis for Company A

Profit has increased year over year, but by almost nothing between 2019 and 2020.

All categories across all regions are profitable, although some more than others.

But not all categories are profitable year over year.

Several factors, such as average sale, average cost, and quantity play a factor

Profit by Region

Category	2018	Order Date	2019	2020
Audio Equipment	\$85,536.62	\$49,960.23	\$62,633.21	\$46,239.05
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Candleholders	\$149,904.86	\$31,308.23	\$57,332.77	\$102,775.45
Candles	\$65,365.27	\$624.51	\$63,230.51	\$28,619.38
Car Accessories	\$57,961.45	\$65,833.73	\$69,526.46	\$58,488.52
Construction	\$185,374.73	\$84,365.33	\$55,658.24	\$5,011.80
Cookware	\$112,281.35	\$38,228.66	\$53,455.88	\$40,856.33
Desktop Comput..	\$65,004.27	\$27,962.45	\$98,218.65	\$29,627.87
Dining Furniture	\$116,368.57	\$70,503.30	\$47,201.03	\$117,140.32
Executive Office	\$112,281.35	\$38,228.66	\$65,365.27	\$27,962.45
Fitness Trackers	\$98,218.65	\$29,627.87	\$116,368.57	\$70,503.30
Floor Lamps	\$112,281.35	\$38,228.66	\$116,368.57	\$70,503.30
Fragrances	\$65,365.27	\$27,962.45	\$112,281.35	\$38,228.66
Gaming Chairs	\$116,368.57	\$70,503.30	\$98,218.65	\$29,627.87
Hardware	\$112,281.35	\$38,228.66	\$116,368.57	\$70,503.30
Holiday Tech	\$65,365.27	\$27,962.45	\$112,281.35	\$38,228.66
Home Décor	\$116,368.57	\$70,503.30	\$112,281.35	\$38,228.66
Hotel Tech	\$112,281.35	\$38,228.66	\$65,365.27	\$27,962.45
Jewelry	\$116,368.57	\$70,503.30	\$112,281.35	\$38,228.66

A Drag to add text

Show title

Size

Custom size (1216 x 864)

Data Source Sales Channel: Michael... Profit by Region Map: Michael M... Profit by Year in 5 Largest Mark... KPI Sheet: Michael Micek Profit Analysis Dashboard: Michael Micek Profit Story: Michael Micek

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All categories across all regions are profitable, although some more than others.

But not all categories are profitable year over year.

Several factors, such as average sale, average cost, and order quantity play a factor in profits.

Profit by Region

Category	Personal Care	Landscaping Supplies	Tools	Kitchen Luxury	Kitchen	Dining	Wine & Beer
Tech Accessories							
Desktop Computers	Gaming Chairs						
Phones	Hotel Tech						
Photo Tech	Holiday Tech						
Office Furniture	Car Accessories						
Video Games	Hardware						

Metric Selection
463,879,901,938
Metric Selection..
Profit

A Drag to add text

Show title

Size

Custom size (1216 x 864)

Data Source Sales Channel: Michael... Profit by Region Map: Michael M... Profit by Year in 5 Largest Mark... KPI Sheet: Michael Micek Profit Analysis Dashboard: Michael Micek Profit Story: Michael Micek

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