

Tableau Project Documentation

Introduction

This user story outlines the specifications for building two dashboards using Tableau to help stakeholders, including sales managers and executives, analyze sales performance and customer behavior. The dashboards aim to provide actionable insights to improve decision-making and business growth.

Sales Dashboard | Requirements

Dashboard Purpose

The Sales Dashboard presents an overview of the sales metrics and trends in order to analyze year-over-year sales performance and understand sales trends.

Key Requirements

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.

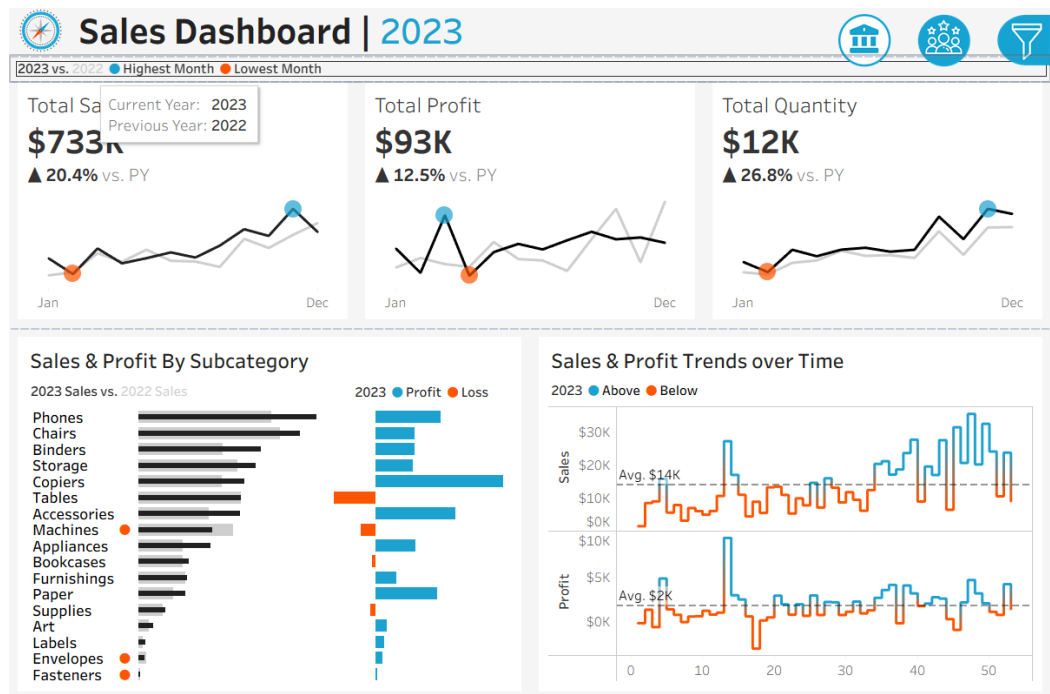
Product Subcategory Comparison

- 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.

Figure 1: Sales Dashboard with interactive filters and profit analysis.



Customer Dashboard | Requirements

Dashboard Purpose

The Customer Dashboard provides an overview of customer data, trends, and behaviors. It helps marketing teams and management understand customer segments and improve satisfaction.

Key Requirements

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.
- 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 rank, number of orders, current sales, current profit, and the last order date.

Design & Interactivity Requirements

Dashboard Dynamics

- The Dashboard should allow users to check historical data by selecting any desired year.
- Provide navigation between dashboards.
- Make charts and graphs interactive, enabling users to filter data using the charts.

Data Filters

- Allow filtering by product information.
- Allow filtering by location information.

Figure 2: Customer Dashboard with customer distribution and profitability analysis.

