

PURPOSE

- ✓ To visually compare sales between different product categories.
- ✓ To quickly identify which category is generating maximum revenue.
- ✓ To find categories with lower performance that need improvement.
- ✓ To support decision-making like stock planning, marketing focus, and investment.
- ✓ To analyze business performance in a clear and simple way.
- ✓ Helps management understand which product line contributes most to total sales.

STEP-BY-STEP POINTS

BAR CHART : Category Wise Sales Comparison (Bar Chart in Tableau)

1. Open Tableau & Connect Data

- Open Tableau Desktop
 - Click Connect to Data and load your dataset (Excel/CSV).
- Drag Category (Product Line) to Columns
- From Data pane, drag Product Line / Category → Columns shelf

2. Drag Sales to Rows

- Drag Sales → Rows shelf
 - Make sure it shows SUM(Sales)
- Select Bar Chart Type
- Go to Marks card

→ Select Bar

OR

→ Click Show Me → Choose Bar Chart

Format the Chart

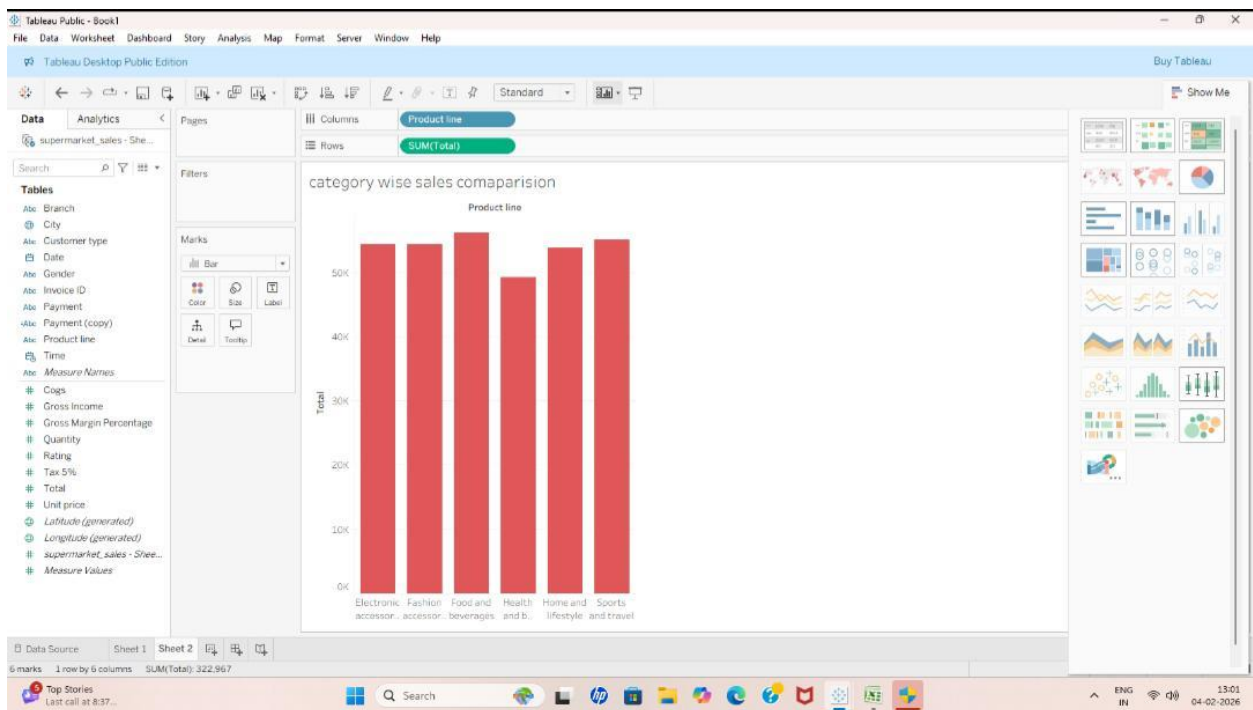
→ Click on Color → Choose red (or any color)

→ Add Label (Marks → Label → Show Mark Labels)

Edit Title

→ Double click title

→ Rename as “Category Wise Sales Comparison”



PURPOSE

- ✓ To show how total sales are divided among segments.
- ✓ To understand each segment's share in overall revenue.
- ✓ To identify which segment contributes the highest percentage.
- ✓ To provide a quick summary view of sales distribution.
- ✓ To present data in a simple and easy-to-understand format.

STEP-BY-STEP POINTS

PIE CHART

1. Open Tableau & Connect Data

→ Load your dataset

Select Two Fields (Ctrl key)

→ Select Branch / Payment (Dimension)

→ Select Sales (Measure)

2. Click “Show Me” (Top Right Corner)

→ Click Pie Chart icon

Check Marks Card

3. Tableau automatically places:

→ Dimension → Color

→ SUM(Sales) → Angle

→ SUM(Sales) → Label

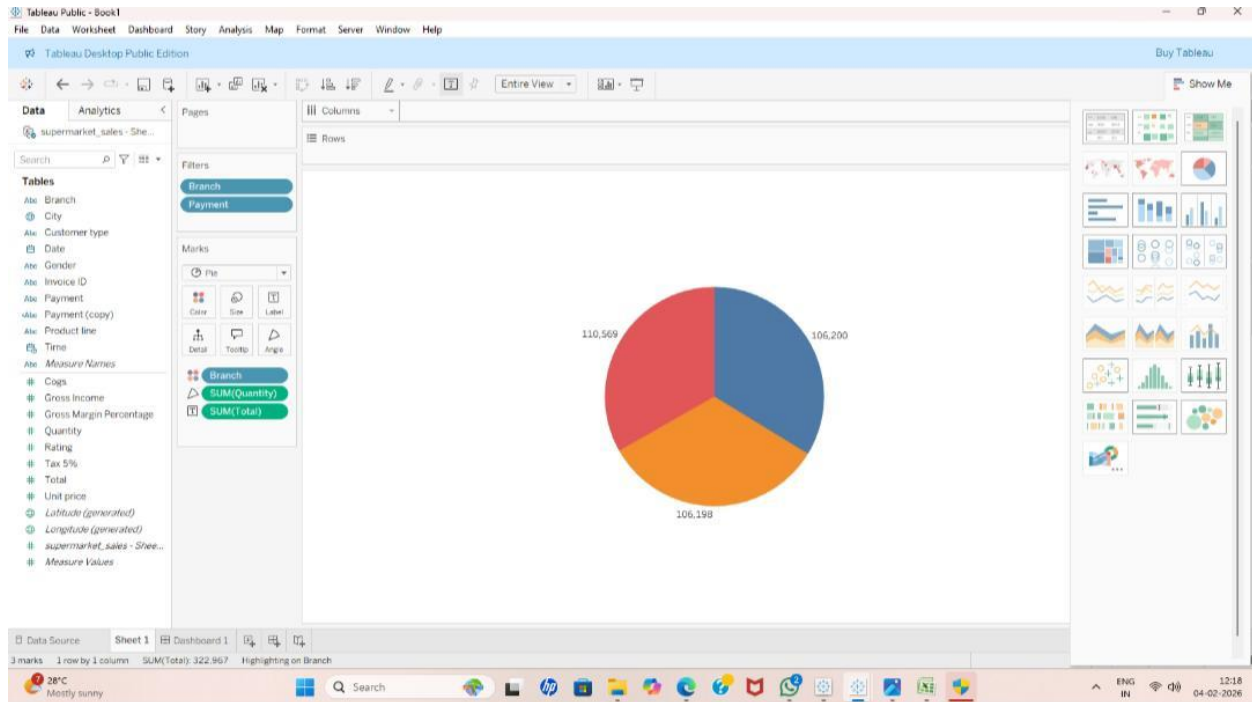
Increase Pie Size

→ Marks → Size → Increase slider

4. Add Percentage (Optional)

→ Click Sales in Label

→ Quick Table Calculation → Percent of Total



PURPOSE

- ✓ To compare total sales across different branches.
- ✓ To see contribution of each product line within every branch.
- ✓ To understand both overall performance and category breakdown at the same time.
- ✓ To identify which branch performs better in specific product lines.

STEP-BY-STEP POINTS

STACKED BAR CHART

1. Open Tableau & Connect Data

- Open Tableau
- Connect to your dataset (Excel/CSV)

2. Drag Branch to Columns

- Drag Branch → Columns shelf

3. Drag Sales to Rows

- Drag Sales → Rows shelf
- Make sure it shows SUM(Sales)

4. Change Chart Type to Bar

- In Marks card select Bar

(or use Show Me → Bar chart)

5. Add Product Line to Color

→ Drag Product Line / Category → Drop on Color (Marks card)

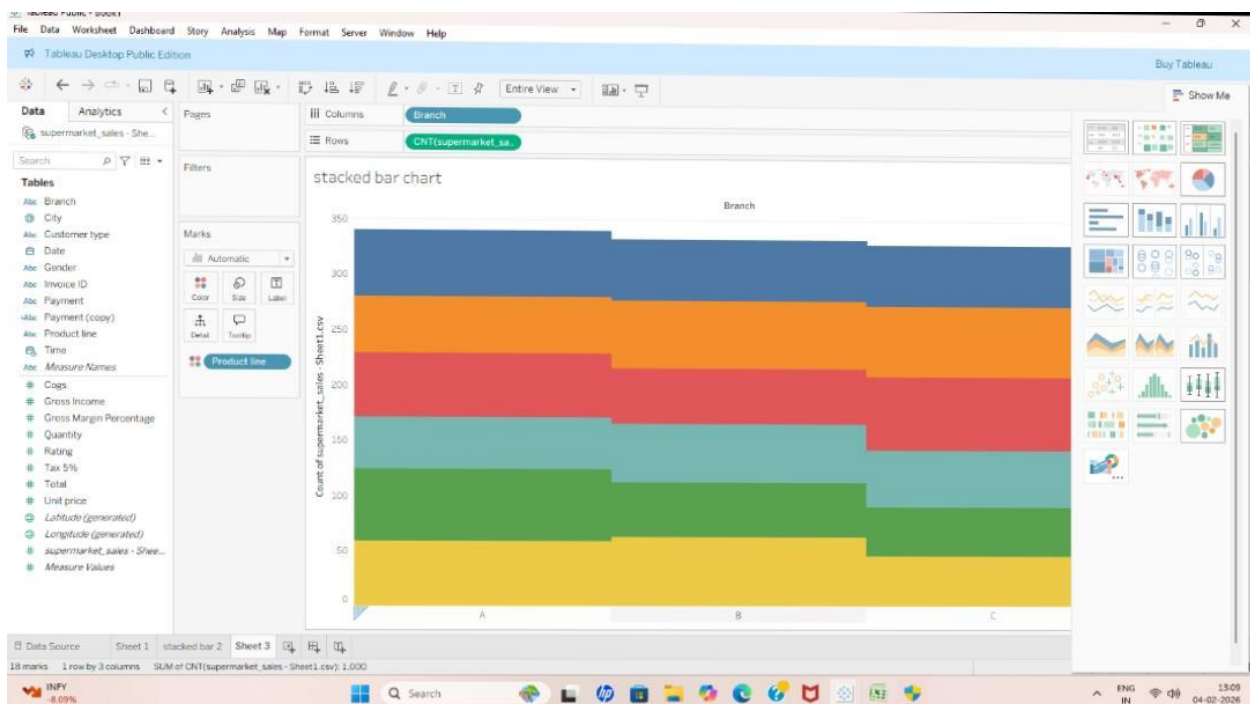
→ Bars will become stacked automatically

6. Format the Chart

→ Adjust colors

→ Add labels if needed (Marks → Label → Show Mark Labels)

→ Edit title to “Branch Wise Stacked Sales Chart”



PURPOSE

- ✓ To analyze sales trend over time.
- ✓ To identify increase or decrease in sales month-wise.
- ✓ To track business performance across different periods.
- ✓ To observe patterns and seasonal changes.
- ✓ To support forecasting and future planning.

STEP-BY-STEP POINTS

LINE CHART

1. Open Tableau & Connect Data

→ Load your dataset (Excel/CSV)

2. Drag Date to Columns

→ Drag Date → Columns shelf

→ Select Month / Year as needed

3. Drag Sales to Rows

→ Drag Sales → Rows shelf

→ Ensure it shows SUM(Sales)

4. Change Chart Type to Line

→ Marks card → Select Line

OR

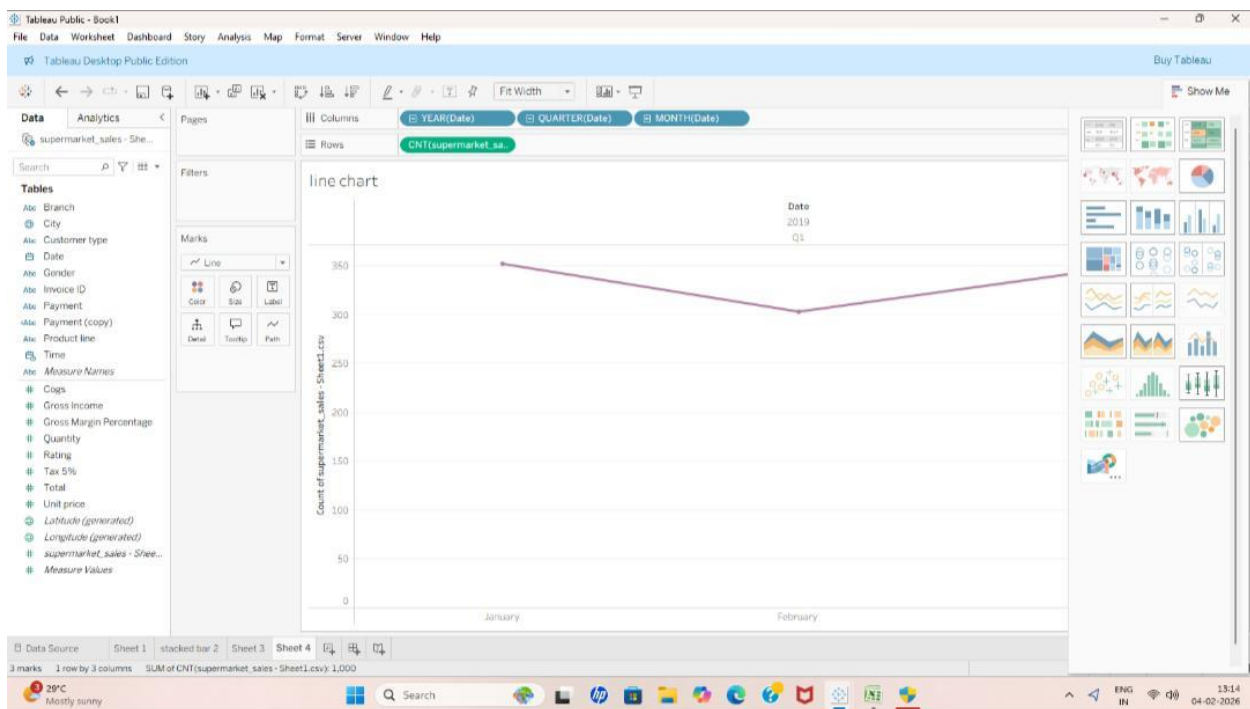
→ Click Show Me → Line chart

5. Adjust Date Format

- Click Date pill → Choose Continuous (Green) if needed
- Select Month/Year properly

6. Format the Chart

- Edit Title (e.g., “Monthly Sales Trend”)
- Add Labels if required
- Adjust color and size



PURPOSE

- The purpose is to provide an immediate visual weight to your data.
- It bypasses the need to read a table by using size and color to show which
- "Product Lines" or "Metrics" are dominating your supermarket's performance. It is the best chart for answering
- "What is our biggest slice of the pie right now
- The main purpose is Visual Prioritization. It allows a viewer to instantly identify the most significant data points in a large dataset

STEP-BY-STEP POINTS

BUBBLE CHART

1. Open Tableau & Connect Data

- **Action:** Load your supermarket_sales.csv (as seen in your screenshot).
- **Goal:** Ensure Tableau recognizes your "Product Line" as a **Dimension** and "Sales/Quantity" as **Measures**.

2. Drag Dimension to Detail

- **Action:** Drag **Product Line** (or the category you want to compare) onto the **Detail** property in the Marks card.
- **Goal:** This tells Tableau to create a separate mark (circle) for every unique item in that category.

3. Drag Measure to Size

- **Action:** Drag **Total** or **Quantity** onto the **Size** property.
- **Goal:** This is the most critical step. It transforms the uniform dots into "bubbles" where the **area** of the circle reflects the value (e.g., bigger bubble = higher sales).

4. Change Mark Type to "Circle"

- **Action:** In the Marks card dropdown, change the selection from "Automatic" to **Circle**.
- **Goal:** This forces Tableau into the "Packed Bubble" layout, causing the circles to cluster together tightly rather than spreading across an axis.

5. Drag dimension

- **Action:** Drag **Product Line** onto the **Color** property.
- **Goal:** This creates visual separation. It allows the viewer to distinguish between "Fashion Accessories" (Teal) and "Food & Beverages" (Blue) at a glance.

6. Add Labels and Tooltips

- **Action:** Drag **Product Line** and **Total** onto the **Label** property.
- **Goal:** This puts the text inside the bubbles (as seen in your "Gaga" or "Rating" labels). Ensure the **Tooltip** is cleaned up so that hovering reveals the exact numbers, like the **902 Quantity** shown in your image

