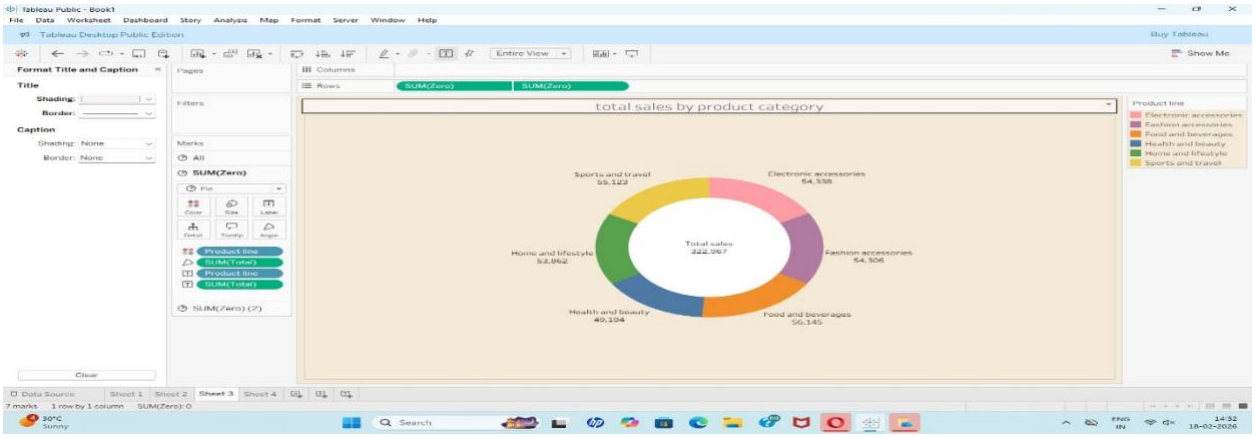
PURPOSE

- The primary purpose of a donut chart
- is to show proportional relationships
- how individual categories (Cash, Credit card, Ewallet) contribute to a whole (Total Sales)
- By leaving the center open, it provides a clean space to display a "Grand Total,"
- making it more informative than a standard pie chart.

STEP-BY-BY POINTS

DOUNT CHART

1. **Create Placeholder Axes**:
    - Drag a calculated field with the value 0 (often called a "Zero" or "Placeholder" field)
    - to the Rows shelf twice. This creates two identical axes for a "Dual Axis" approach.
2. **Configure the Primary Pie**:
    - Select the first SUM(Zero) mark in the Marks card and change the chart type to Pie.
    - Drag Payment to Color and Total to Angle to create the segments.
3. **Configure the Secondary Circle (The "Hole")**:
    - Select the second SUM(Zero) mark.
    - Remove all fields from Color and Angle, change the color to white (or the background color)
4. **Combine into a Dual Axis**:
    - Right-click the second SUM(Zero) pill on the Rows shelf and select Dual Axis.
    - Right-click the axis in the view and select Synchronize Axis to center both circles.
5. **Add Data Labels and Center Text**:
    - For the outer ring, drag Payment and Total to the Label shelf to identify the segments.
    - For the inner white circle, drag the Total measure to the Label shelf to display the grand total (322,967) in the center.
6. **Final Formatting and Clean-up**:
    - Right-click the view and select Format to remove zero lines, grid lines, and headers for a clean look.
    - Edit the chart title to "DONUT CHART SHOWING TOTAL SALES BY PAYMENT METHOD" as shown in your screenshot.



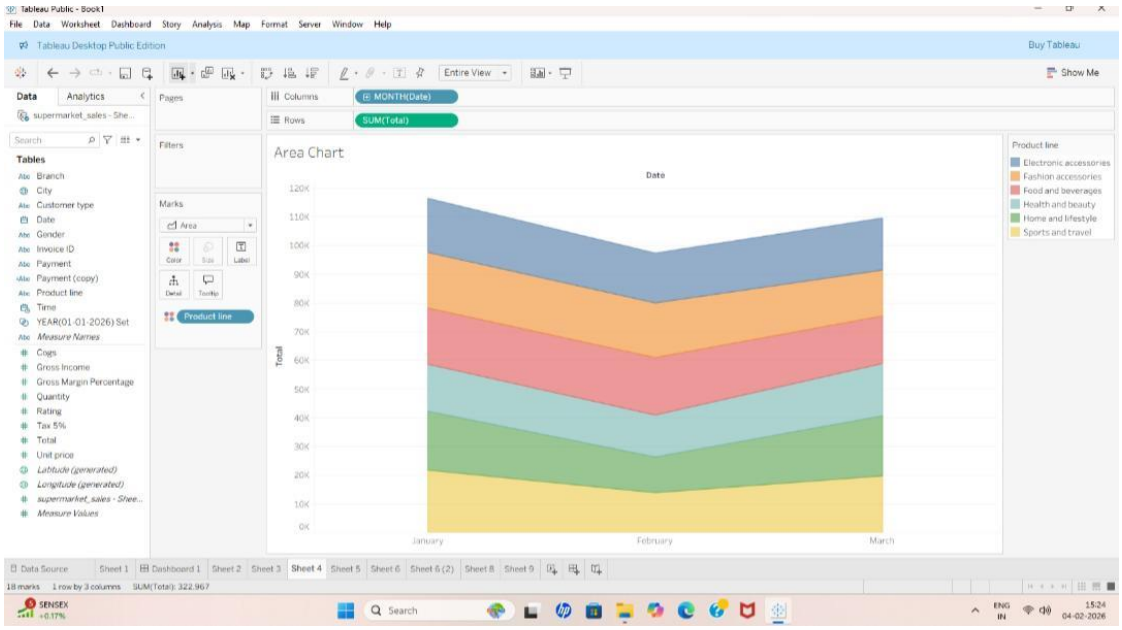
PURPOSE

- The primary purpose of a Stacked Area Chart is to show both the total
- trend over time and the individual contribution of different categories simultaneously.
- It helps viewers see how the overall volume (Total Sales) changes while
- identifying which specific product lines (like Fashion accessories or Electronic accessories)
- are driving those changes.

STEP-BY-STEP POINTS

AREA CHART

1. **Connect Data and Set the Timeline**:
    - Load your dataset and drag the Date field (e.g., Month of Date) to the Columns shelf to establish the horizontal time axis.
2. **Add the Primary Measure**:
    - Drag your main metric, Total (Sales), to the Rows shelf. Initially, this may appear as a simple line chart showing the total sum.
3. **Change Mark Type to Area**:
    - In the Marks card, use the dropdown menu to change the mark type from "Automatic" or "Line" to Area.
4. **Segment by Category**:
    - To "stack" the data, drag the Product line dimension onto the
    - Color property in the Marks card. This creates separate color layers for each product category.
5. **Refine the Level of Detail**:
    - Ensure your Date pill in the Columns shelf is set to the correct level (e.g., Month) and is set to Continuous (green pill
    -) to create a smooth flow between January, February, and March.
6. **Finalize Labels and Formatting**:



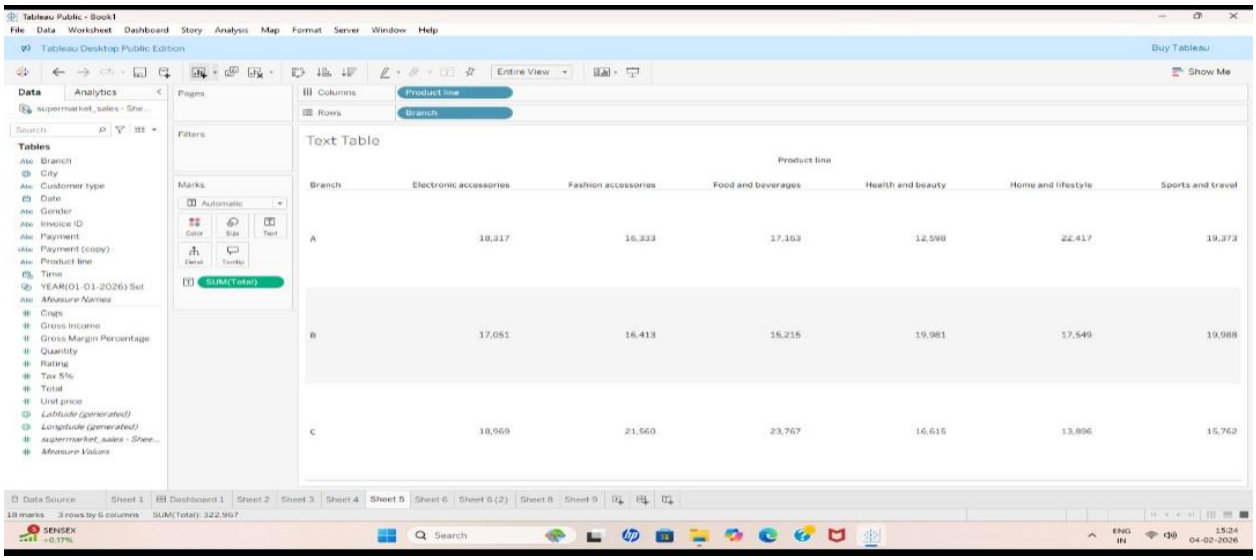
PURPOSE

- To provide a precise, granular view of the
- data where exact numerical values can be compared across two different dimensions (Branch and Product Line).
- Text Table is Operational Precision. It is used when stakeholders need the "ground truth"—exact dollar amounts to
- perform audits, calculate commissions, or compare the

STEP-BY-STEP POINTS

TEXT TABLE

- **Step 1:** Drag the Product line dimension to the Columns shelf to create horizontal headers.
- **Step 2:** Drag the Branch dimension to the Rows shelf to create vertical row headers.
- **Step 3:** Drag the Total (Sales) measure directly onto the Text (Abc) icon in the Marks card.
- **Step 4:** Adjust the table layout by selecting Entire View in the top toolbar to fill the screen.
- **Step 5:** Format the text alignment to ensure the numbers are centered and easy to read within the grid.
- **Step 6:** Apply shading or borders via the Format menu to distinguish between different branches (A, B, and C).



PURPOSE

- To quickly identify high and low-performing intersections of two dimensions
- (Branch and Product Line) using a color-coded gradient
- This is a Performance Heat Map for rapid auditing. The human brain processes color faster than numbers.
- The "darker" cells act as a visual alarm, pointing out exactly where the most activity is happening.

STEP-BY-STEP POINTS

HIGHLIGHT TABLE

1. **Open Tableau & Connect Data**

→ Load your dataset (Excel/CSV)

2. **Drag Dimension to Rows**

→ Drag field like Product / Category → Rows shelf

3. **Drag Another Dimension to Columns**

→ Drag field like Region / Month / Branch → Columns shelf

4. **Drag Measure to Text**

→ Drag Sales / Profit → Marks card → Text

5. Convert to Highlight Table

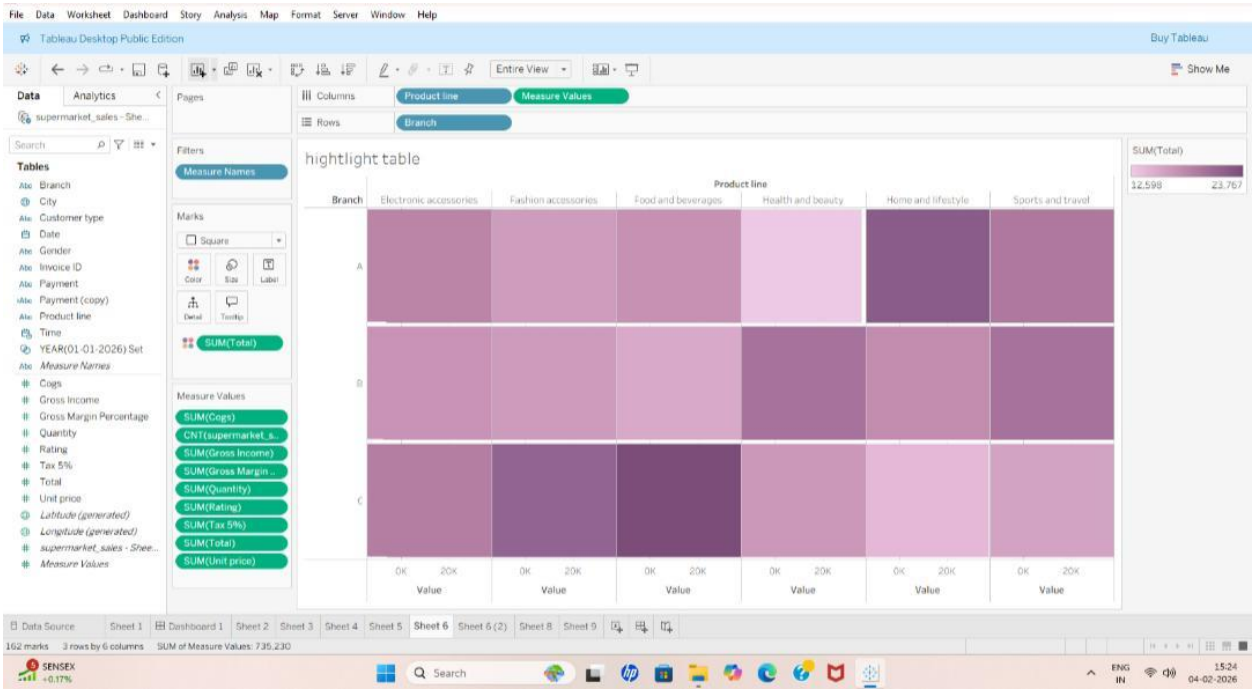
→ Click Show Me → Select Highlight Table

→ Marks card → Change to Square

Drag Measure to Color

→ Drag same Sales/Profit → Color

→ Adjust color range (Edit Colors)



PURPOSE

- The primary purpose is to provide a multi-dimensional analysis
- of supermarket data, moving from high-level summaries
- to temporal trends and granular performance comparisons across branches and product
- (Highlight Table and Text Table). These charts allow stakeholders

STEP-BY STEP POINTS

WORLD CLOUD

1. . **Open Tableau & Connect Data**

→ Load your dataset (Excel/CSV)

Open New Worksheet

2. **Drag Dimension (Text Field)**

→ Drag field like Product Name / Category / Customer Name → Marks card → Text

3. **Change Mark Type to Text**

→ Marks card dropdown → Select Text

4. **Drag Measure to Size**

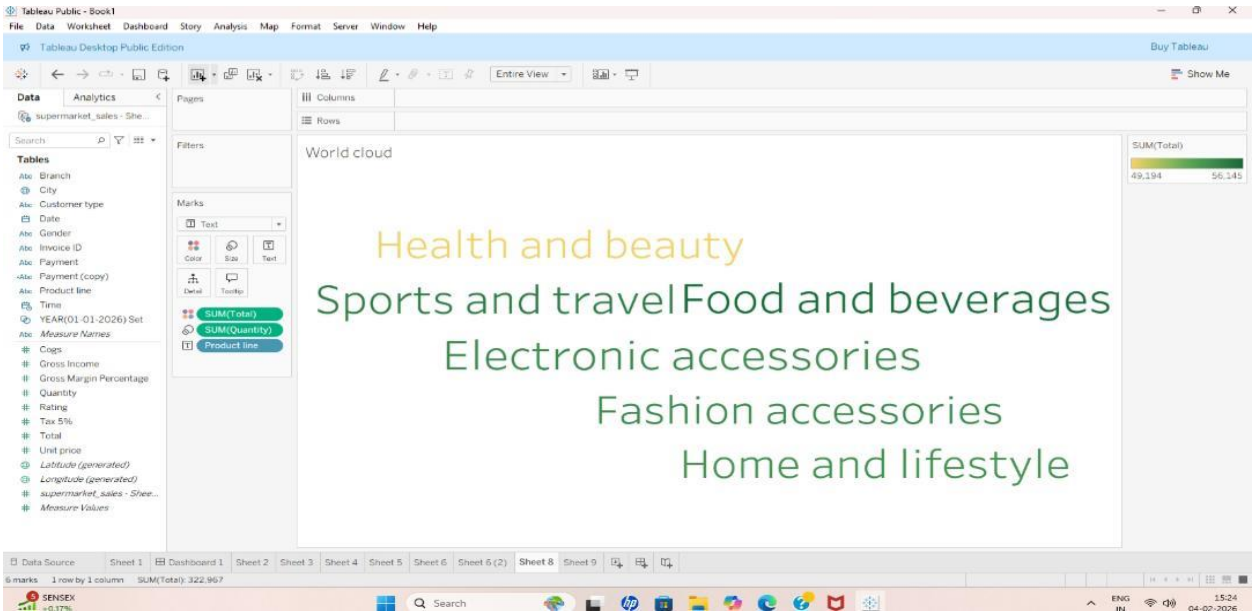
→ Drag Sales / Profit / Count → Size (Marks card)

→ Words size will change based on values

5. **Add Color (Optional)**

→ Drag same measure or category → Color

→ Adjust size slider and formatting



PURPOSE

- In a supermarket context, the purpose of a Funnel Chart is to visualize
- sequential stages of a process, such as a sales pipeline
- or customer journey (e.g., from "Entered Store" to "Added to Cart" to "Purchased"). It helps managers identify where
- "drop-offs" occur, allowing them to optimize the layout or checkout process to ensure more visitors complete a transaction

STEP-BY-STEP POINTS

FUNNEL CHART

1. **Open Tableau & Connect Data**

→ Load your dataset (Excel/CSV)

Drag Stage / Category to Rows

→ Drag your Stage field (e.g., Lead, Prospect, Order) → Rows shelf

2. **Drag Sales (or Count) to Columns**

→ Drag Sales / Count → Columns shelf

→ It should show SUM(Sales)

3. **Sort in Descending Order**

→ Click Sort icon (largest to smallest)

→ Funnel shape works best in descending order

4. **Create Calculated Field for Funnel Shape**

→ Right click in Data pane → Create Calculated Field

→ Name: Negative Sales

SUM([Sales])

→ Click OK

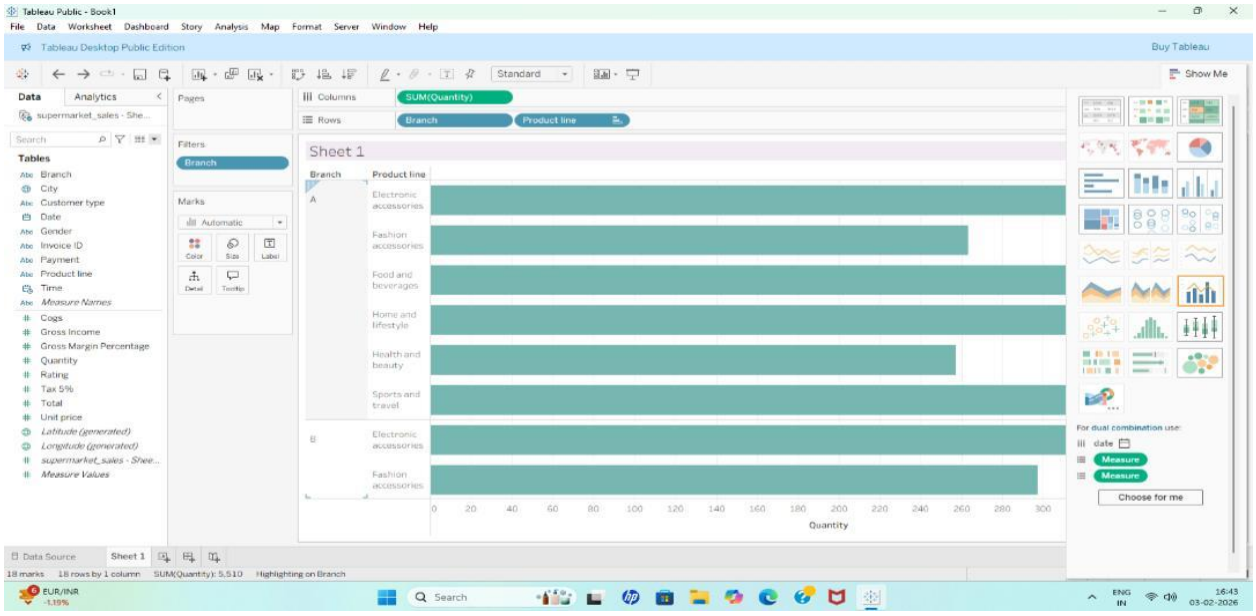
→ Drag this field to Columns (next to Sales)

Convert to Dual Axis & Format

→ Right click second axis → Dual Axis

→ Synchronize Axis

→ Marks → Change both to Bar



PURPOSE

✔ To show how an initial value increases or decreases step by step.

✔ To understand positive and negative contributions.

✔ To analyze profit and loss clearly.

✔ To see how different factors affect total value.

✔ Useful for financial and sales performance analysis.

STEP-BY-STEP POINTS

WATERFALL CHART

1. **Open Tableau & Connect Data**

→ Load your dataset (Excel/CSV)

Drag Category (e.g., Month / Product)

→ Drag Category/Month → Columns shelf

2. **Drag Measure (e.g., Profit / Sales)**

→ Drag Profit/Sales → Rows shelf

Change Mark Type to Gantt Bar

→ In Marks card → Select Gantt Bar

3. Create Running Total

→ Click measure in Rows →

→ Quick Table Calculation → Running Total

4. Add Measure to Size

→ Drag same measure (Profit/Sales) → Size (Marks card)

→ Adjust size slider

→ Add labels if needed