Module 6: Level Of Detail (LOD) Expressions Tableau

Use Case- IV

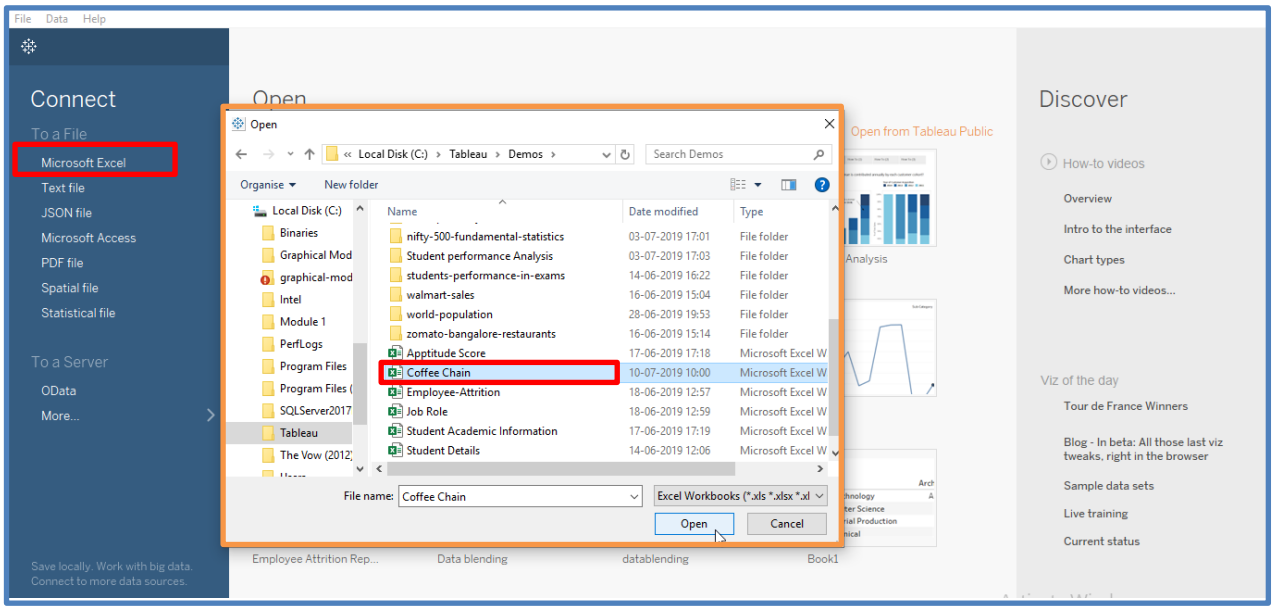
Use Case IV: Profit Vs Target

Using “Coffee Chain Dataset”, create a report which shows percentage of products are meeting their target profit in each state.

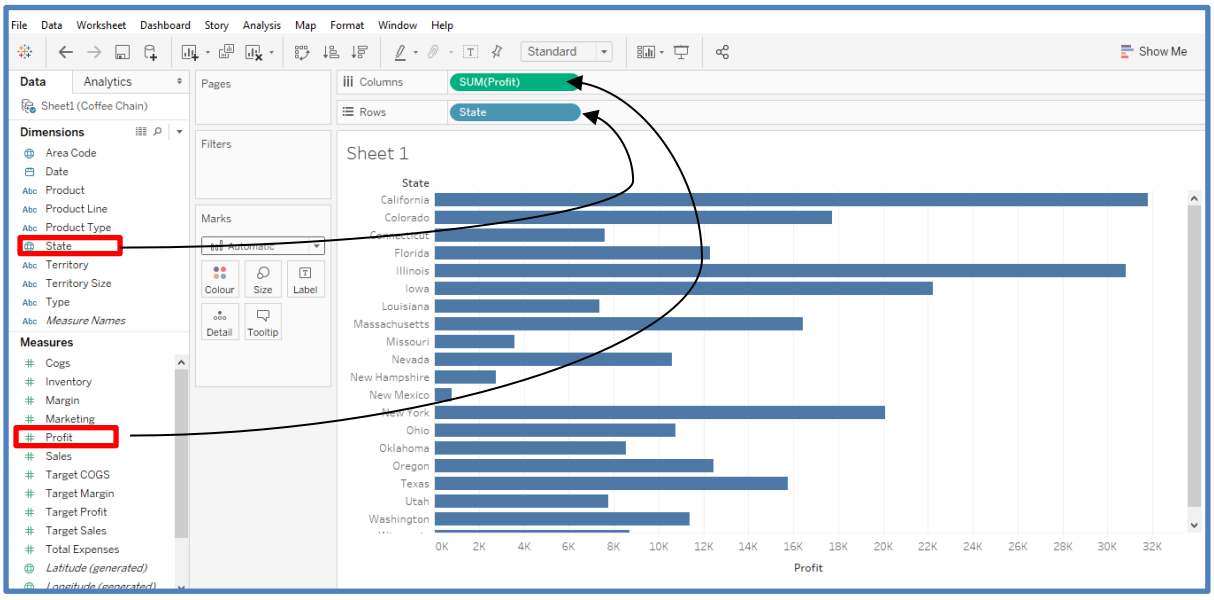
Refer the dataset: Coffee Chain.xlsx

Use Case IV – Solution

Step 1: Click on Connect → Microsoft Excel → Sample – Coffee Chain Dataset → Sheet1

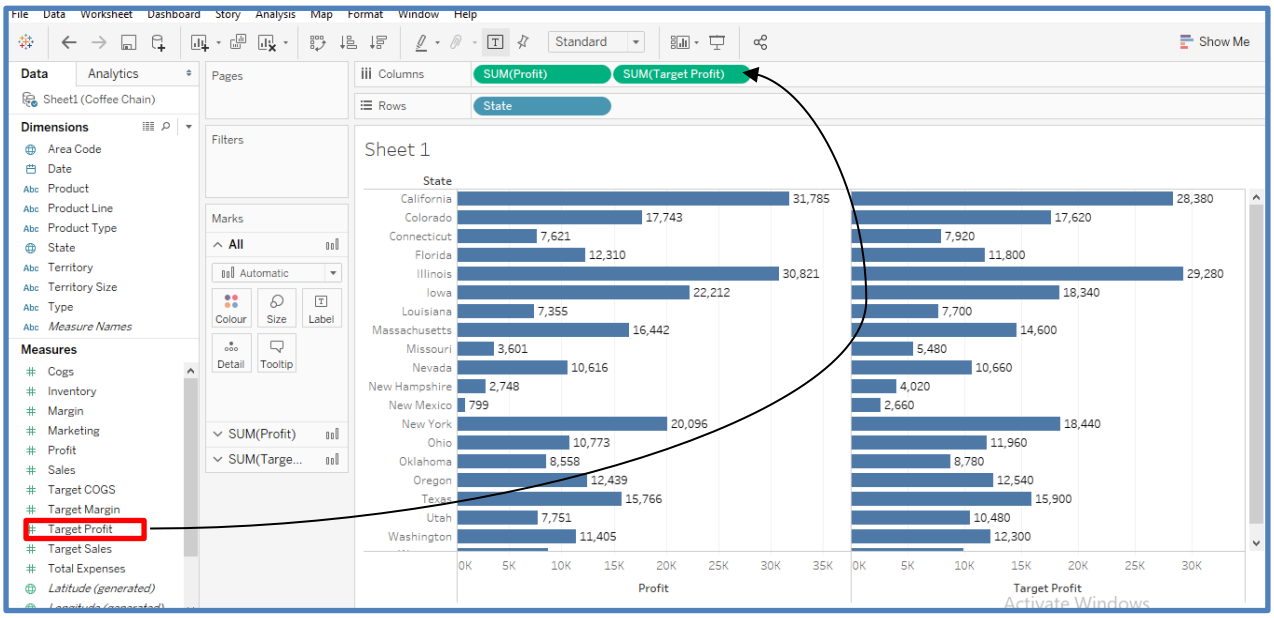


Step 2: Drag Profit to Column shelf and State to Row shelf.



We can see in some States profit is high.

Step 2: To visualize how many cities have met their target profit, drag "Target Profit" to Column.



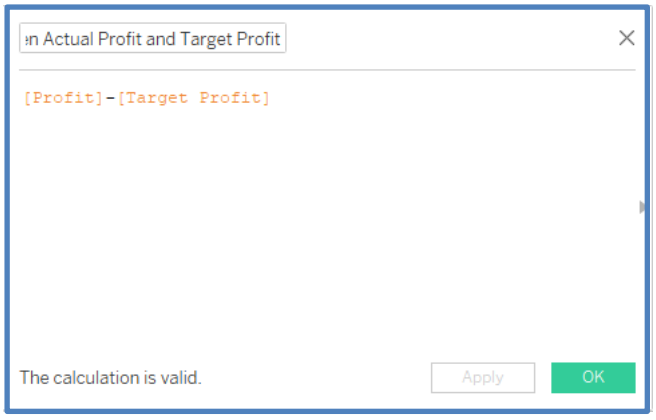
We can visualize, which state has performed good and underperformed, for example California has made profit beyond their target profit.

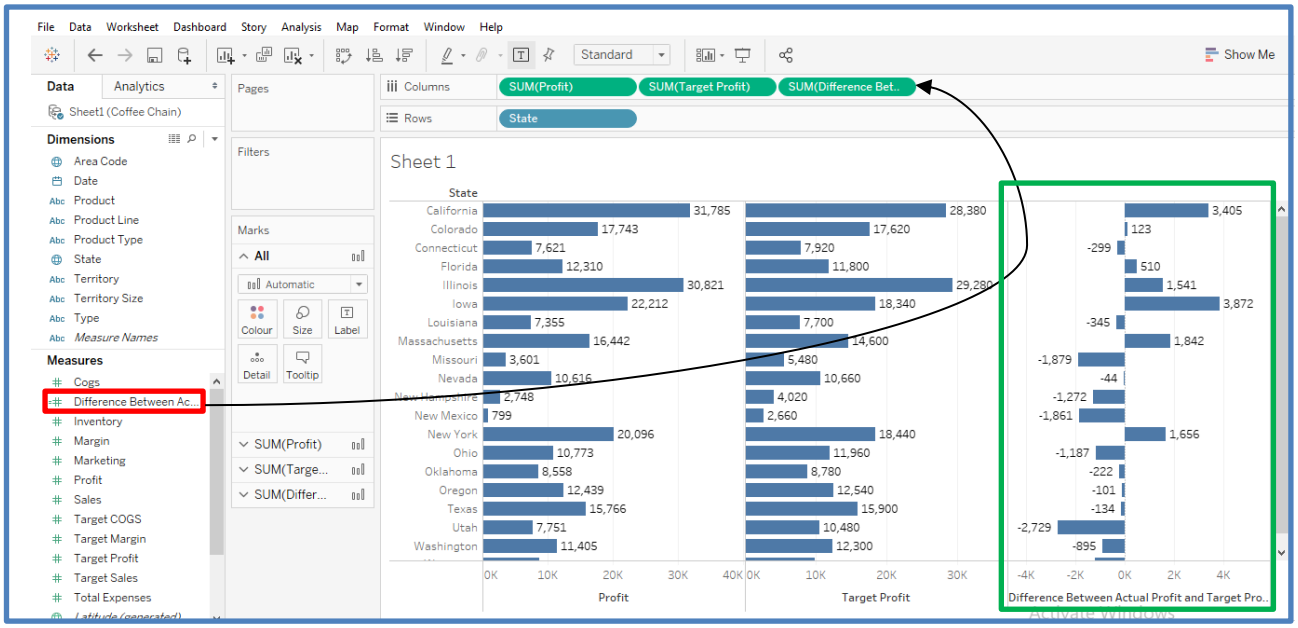
Step 3: In order to count the number of products that are below target in each state, we need to find the difference between actual and target profit per product per state.

- Go to Data pane → Dimensions → Drop Down → Create Calculated Field
- Dialog Box → Rename "Difference Between Actual Profit and Target Profit" → Calculation → OK

Calculation:

```
[Profit]- [Target Profit]
```



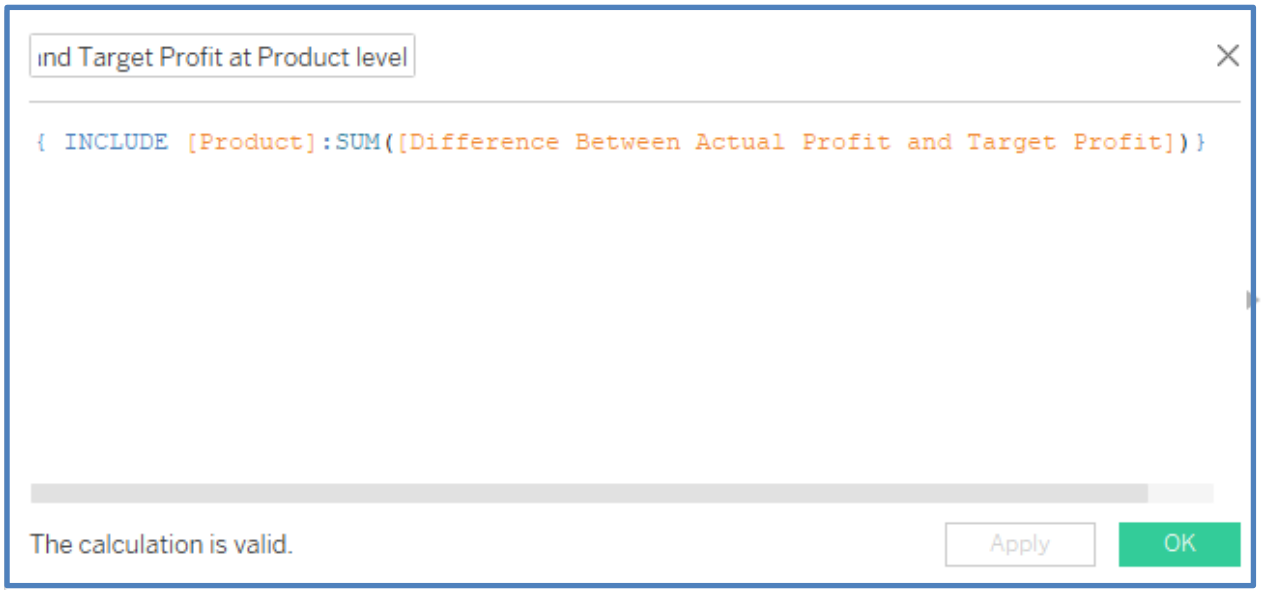


The visualization above shows the difference between actual profit and target profit for each state.

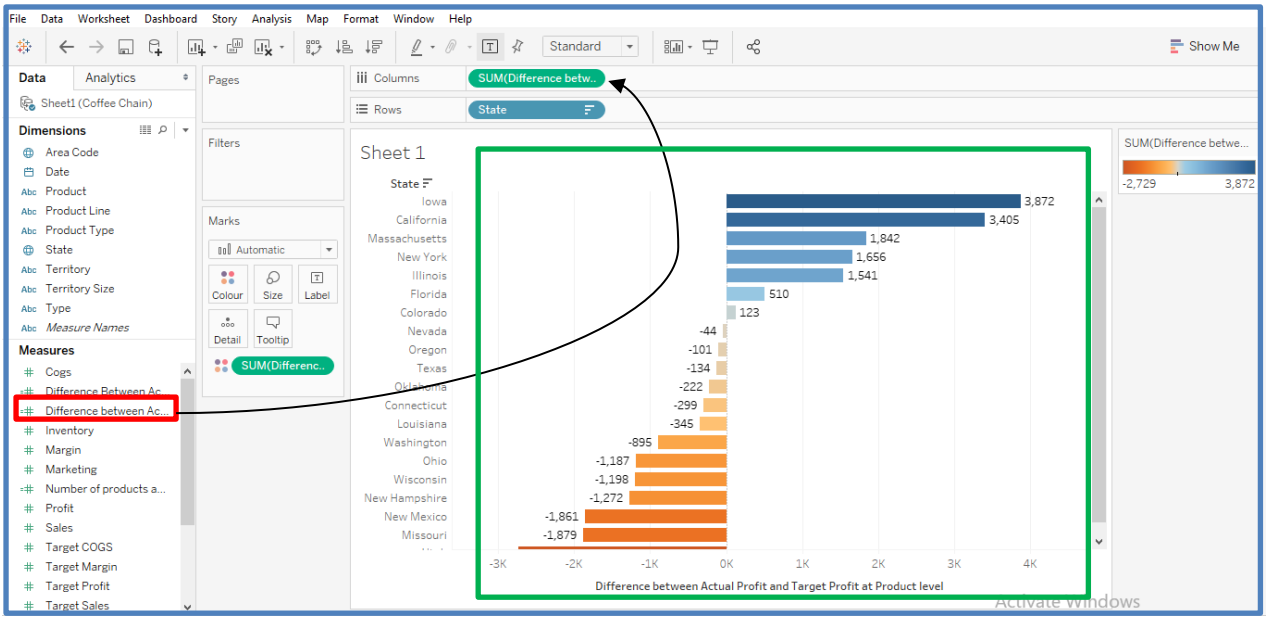
Step 4: Since product is not displayed in the visualization, we require an LOD expression that includes Product in order to find the difference between actual and target profit.

Calculation: Difference between Actual Profit and Target Profit at Product level

```
{INCLUDE [Product]: SUM ([Difference Between Actual Profit and Target
```



Step 5: Drag "Difference between Actual Profit and Target Profit at product level" to Columns and "State" to Rows.



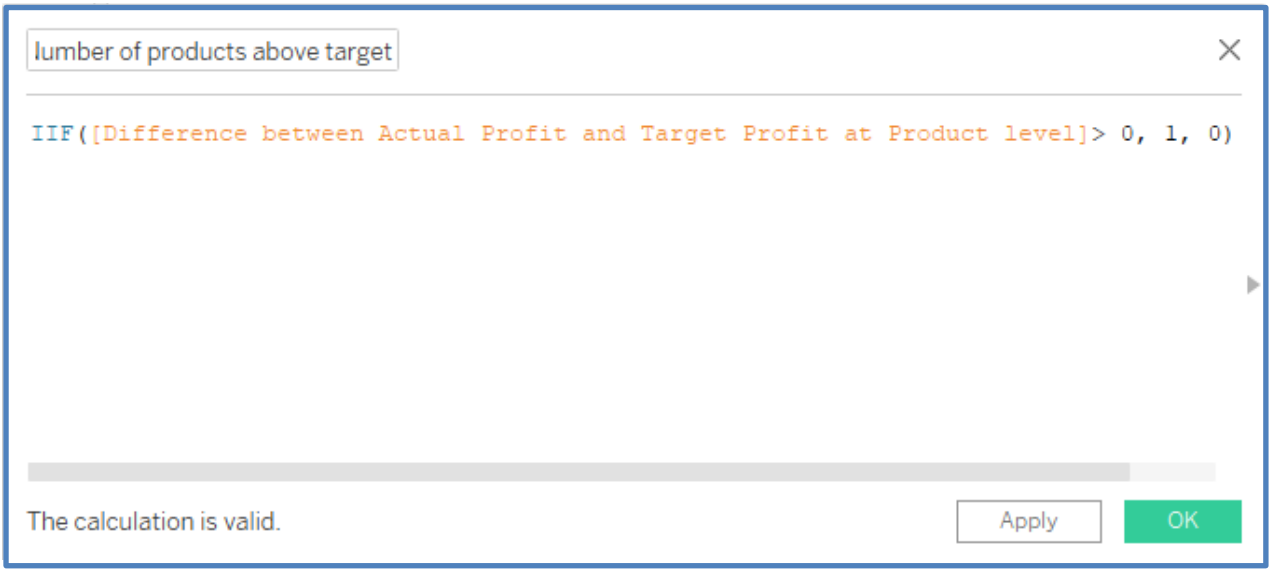
This visualization shows the states which are performing good and bad at product level.

Now, that the difference between Profit and Target Profit is set at product level, a simple logic statement can be used to count the number of products that are above target. Compare this to the distinct count of products sold within each state.

Step 6: Create a calculated field for count of products which are above target.

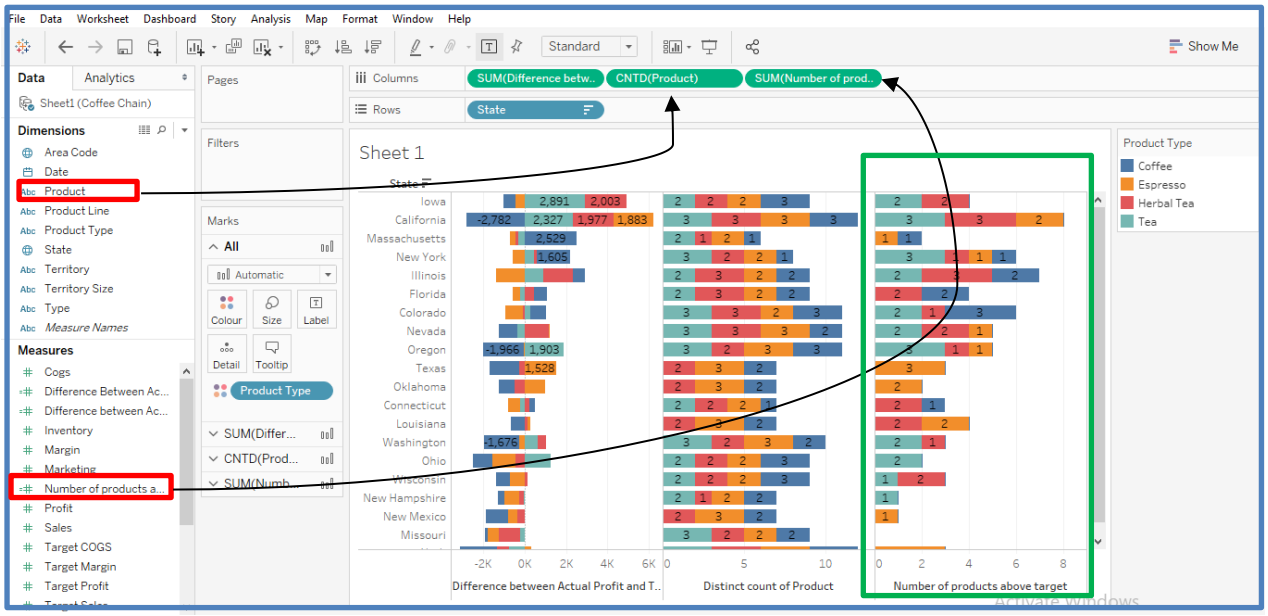
Calculation: Number of products above target level

```
IIF([Difference between Actual Profit and Target Profit at Product level]> 0, 1, 0)
```



If the difference is positive assign 1 and if less than or equal to 0, then 0.

Step 7: Drag “Product and Number of Product above Target level” to Column and “Product Type” to Colors in Marks card.



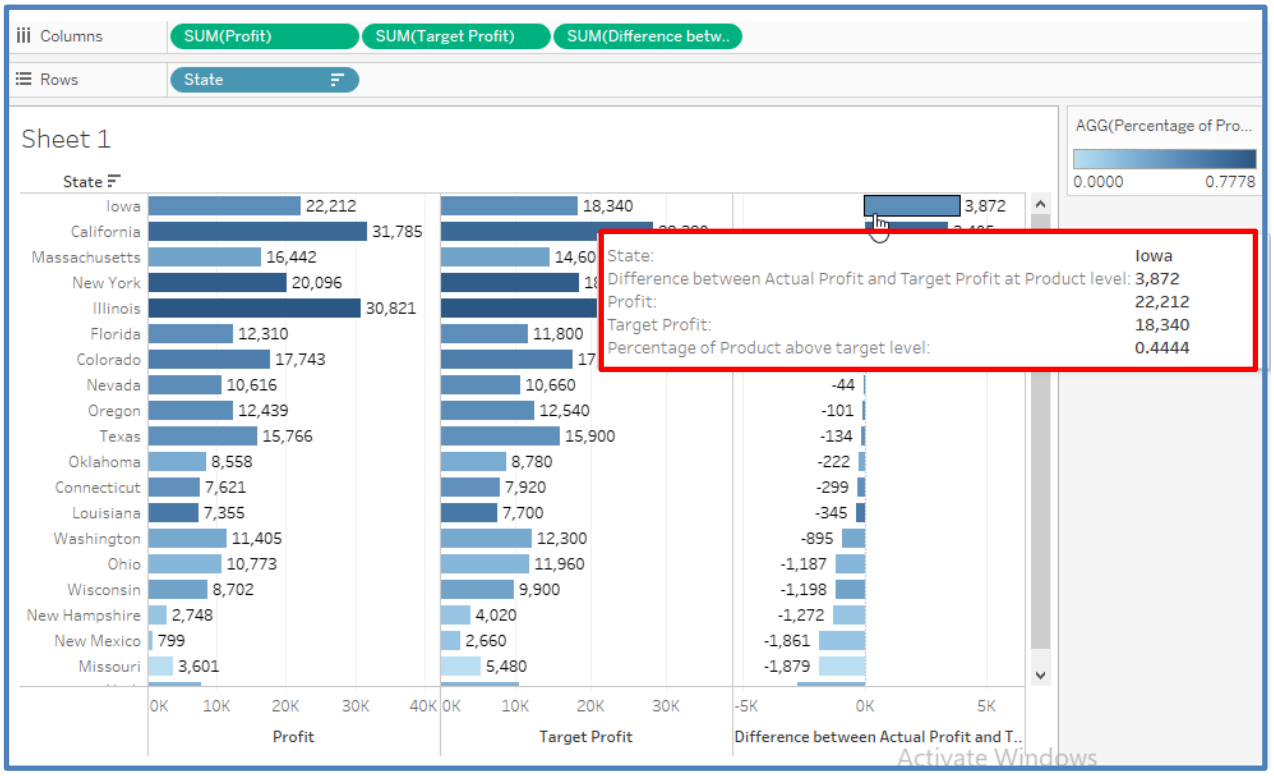
Step 8: To find the percent of products above target, create a calculated field which simply divide the number above target by the total number of products for each state.

Calculation: Percentage of products above target level

```
SUM ([Number of products above target])/COUNTD([Product])
```

Step 9: Take a New sheet:

- Drag Profit, Target Profit and Difference between Actual Profit and Target Profit to Column
- Drag State to Rows
- Drag Percentage of products above target level to Colors in Marks card



The above shown is a visualization for percentage of profit vs target profit at product level.