

# Module 8: Advance Charts in Tableau

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## Demo Document VII

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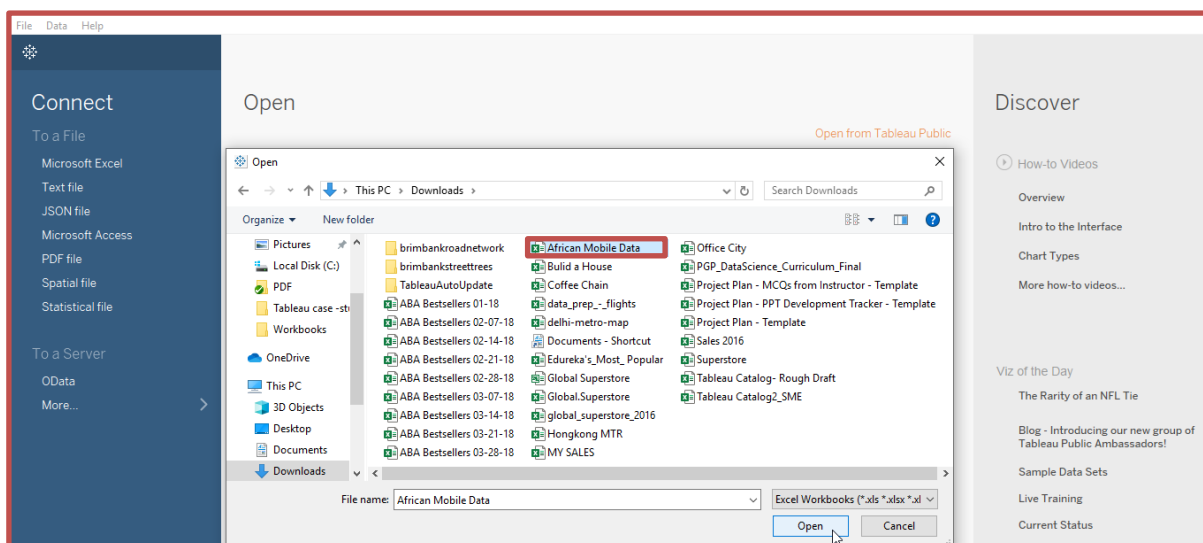
## Demo VII

Using “African Mobile data.xlsx” dataset, build a basic and advance funnel chart showing the segment wise sales.

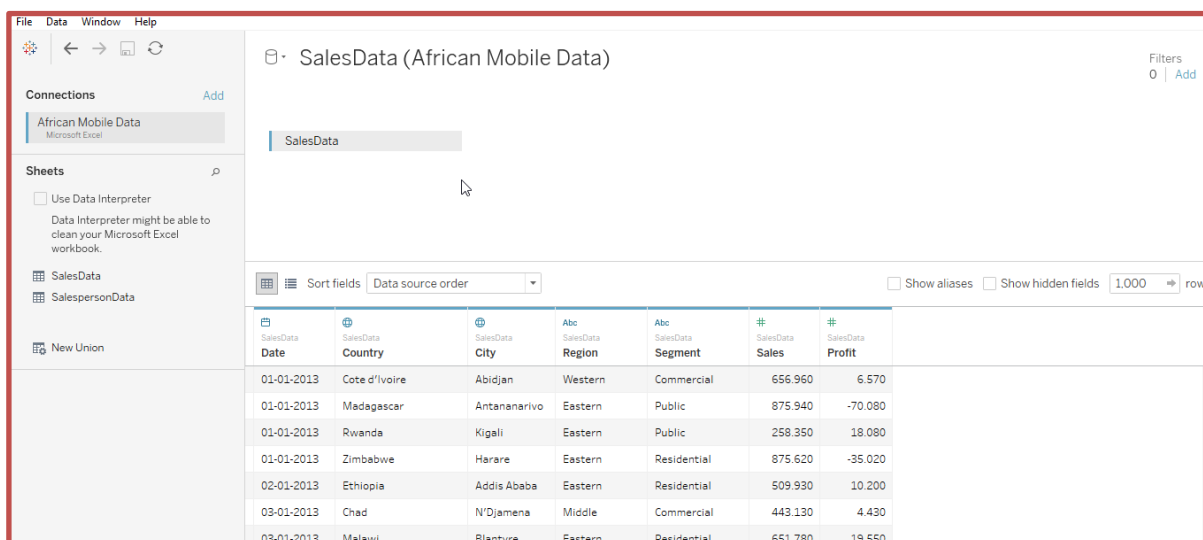
## Demo VII Solution

Funnel chart basically represents the stages of sales and its potential revenue for each stage.

**Step 1:** Click on “Excel file” → Select “African mobile data” → Open



**Step 2:** Drag and drop the sheets that is “African mobile data” sheet on flow pane. Add sales data and click on sheet.

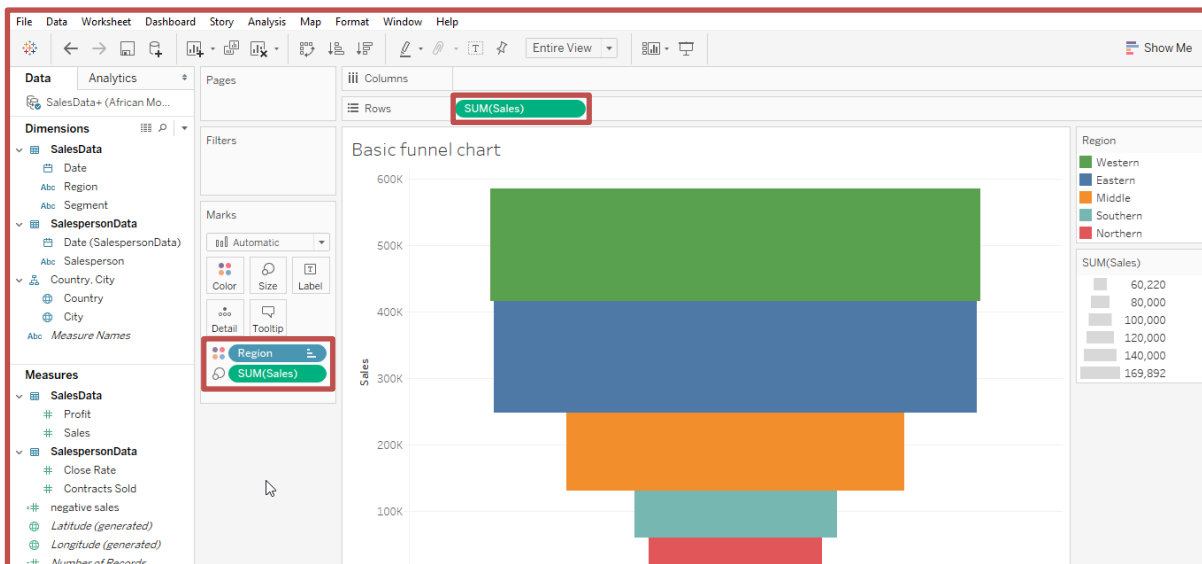


Go to sheet and rename the sheet to “Basic funnel chart”.

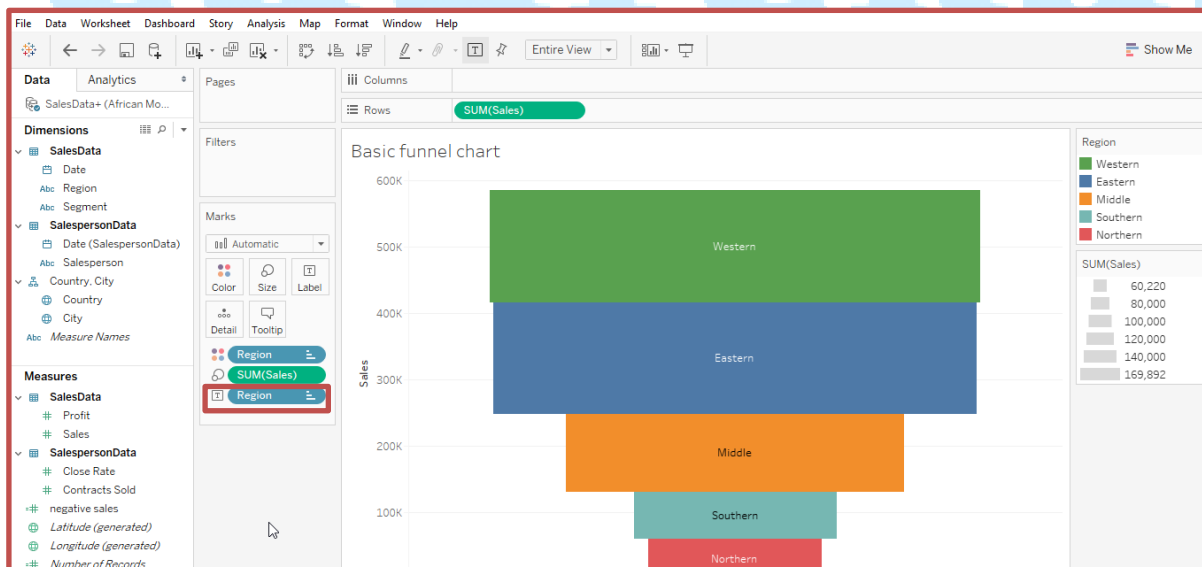
### Step 3: To build basic funnel chart,

Drag and drop the required fields from dimensions and measures to column and row shelf.

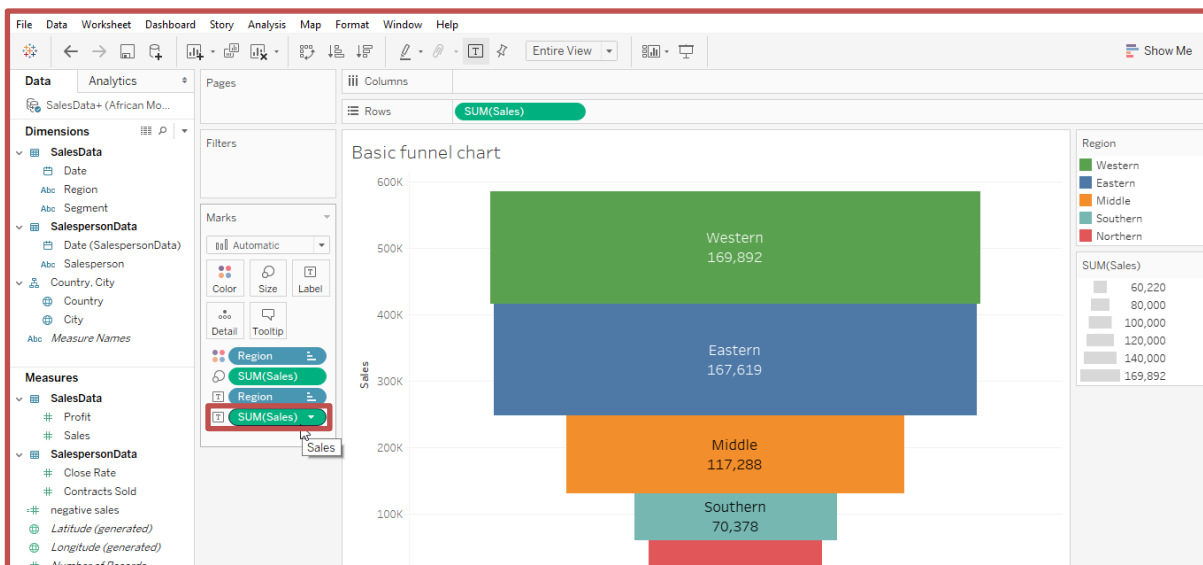
- Sales to rows.
- Region to color pane in marks shelf.
- Sales to size pane in marks shelf.



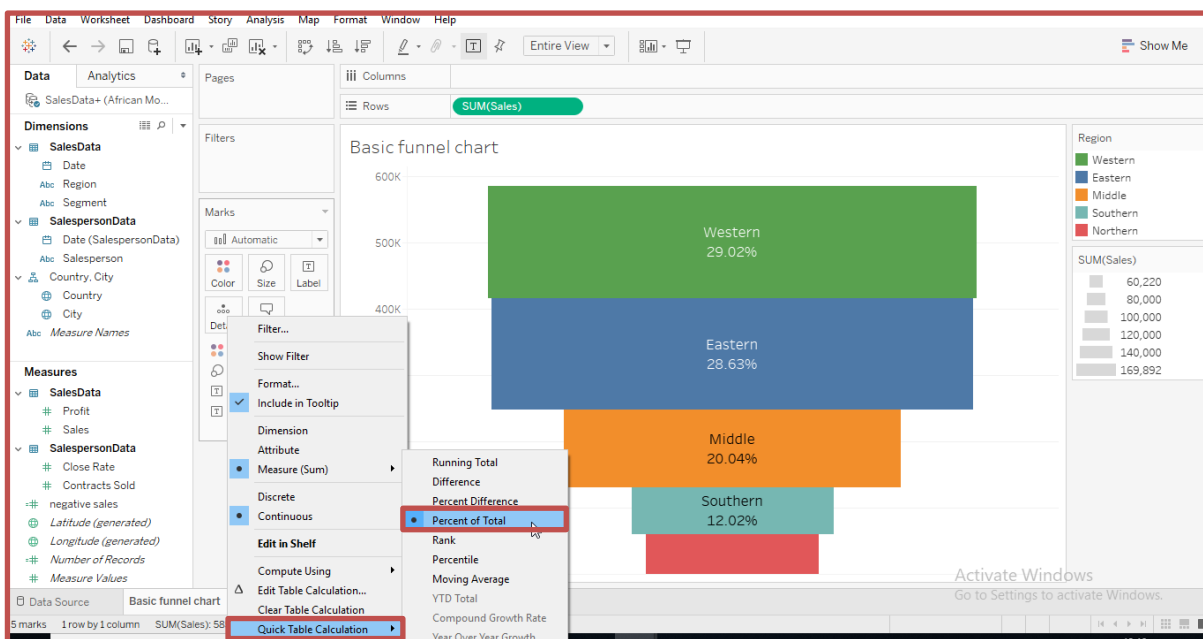
### Step 4: Add Region to label to make the visualization more meaningful.



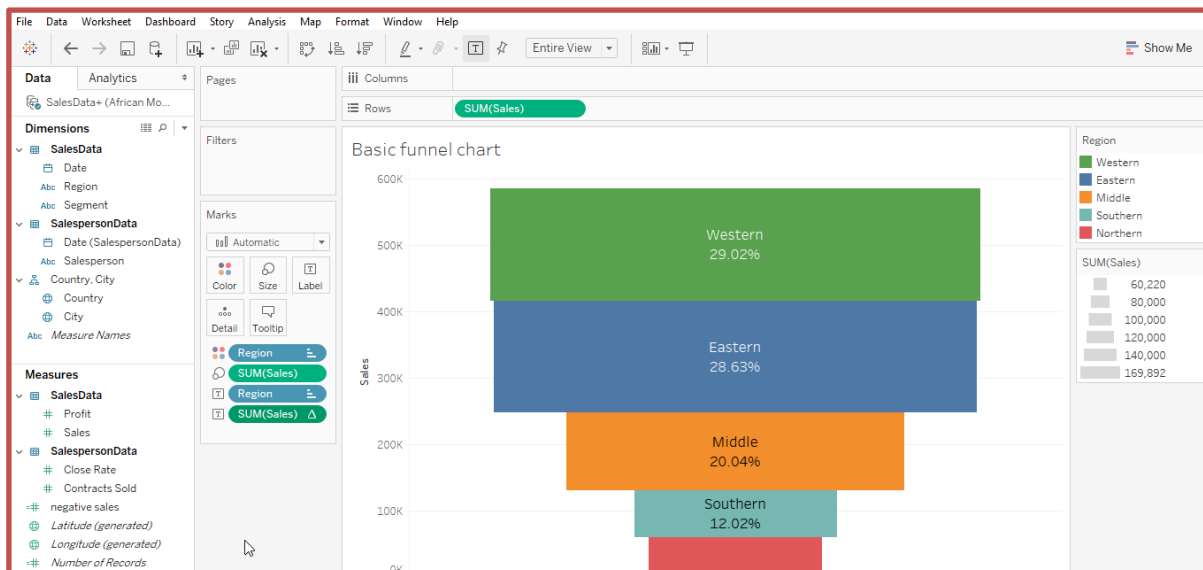
## Step 5: Now add sales to label.



## Step 6: Add a quick table calculation to sales, to add table calculation click the drop down of sales and click on quick table calculation and select percent of total.



We have the required visualization of basic funnel chart.

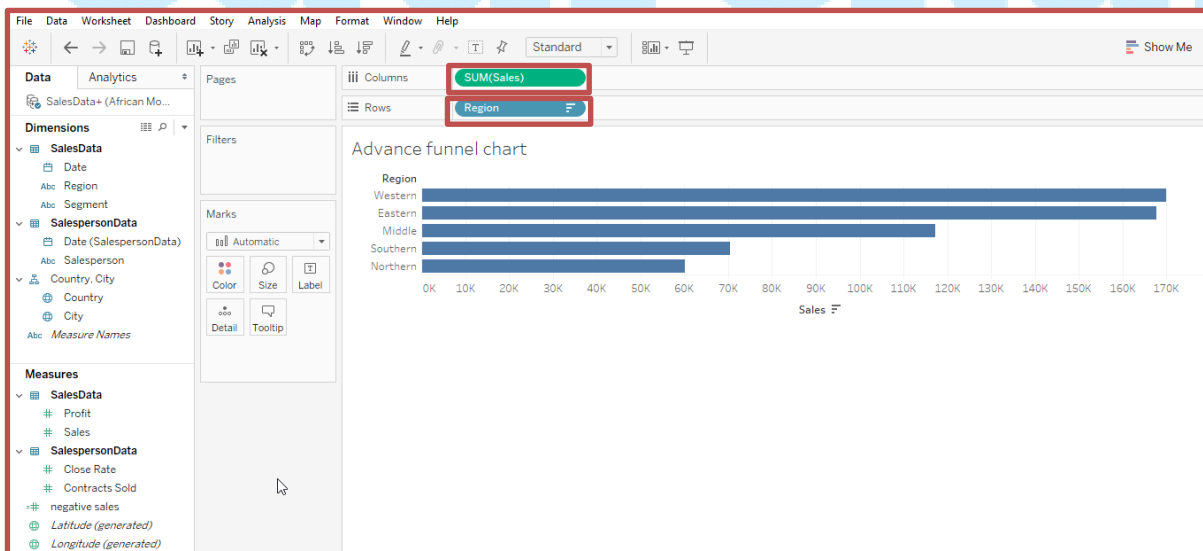


To build **advance** funnel chart:

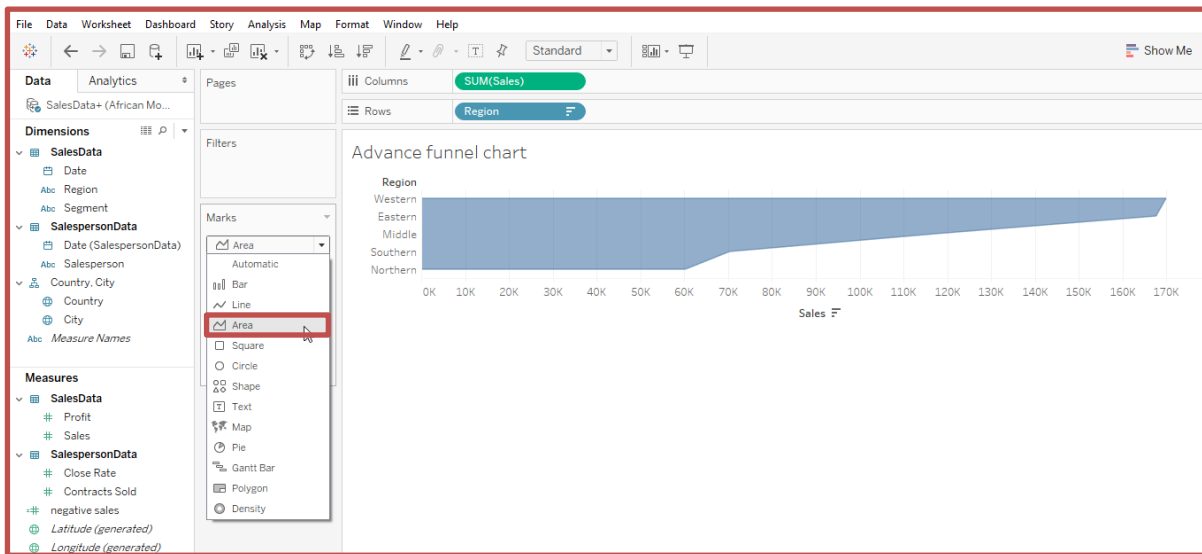
**Step 7:** Click on another sheet and rename the sheet to “Advance funnel chart”

Drag and drop the required fields from dimensions and measures to column and row shelf.

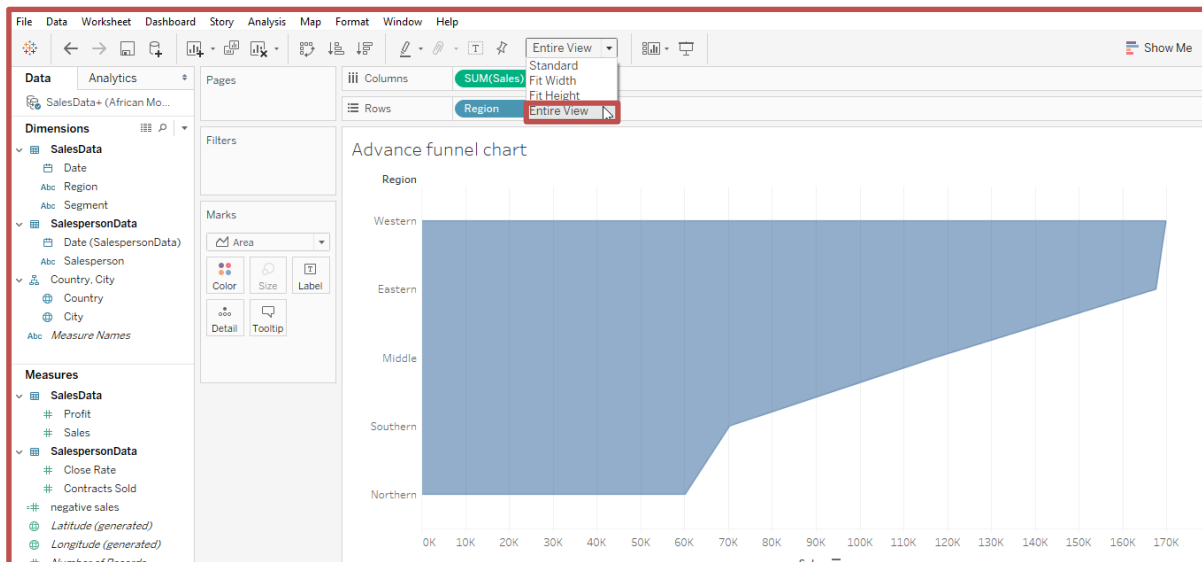
- Sales to columns
- Region to rows.



## Step 8: Change the mark type to area from the marks shelf.

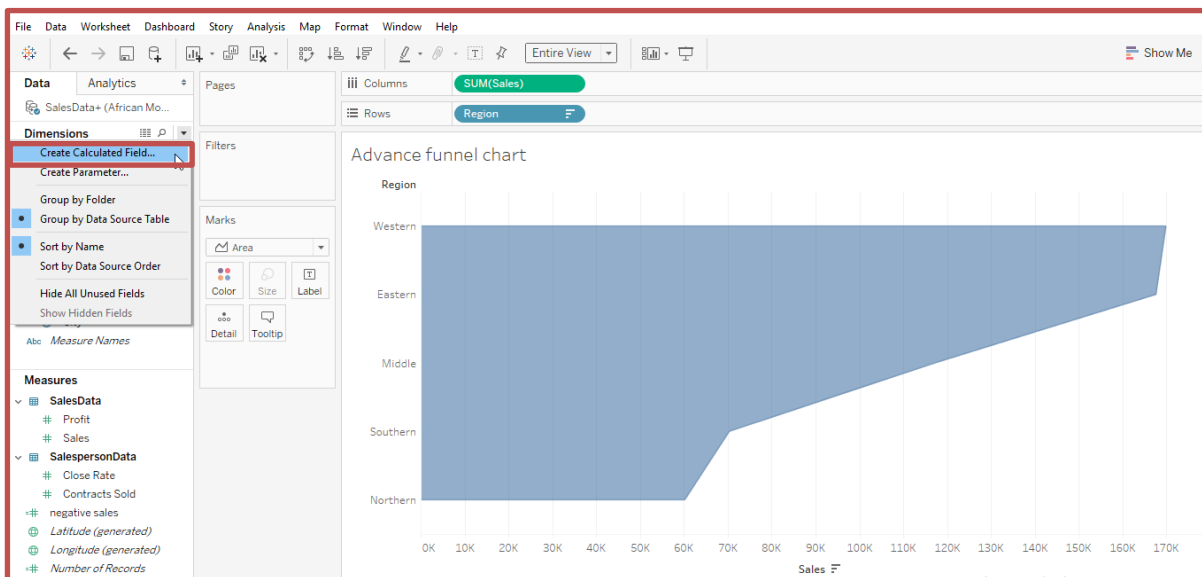


## Step 9: Change the view to entire view for better visualization.

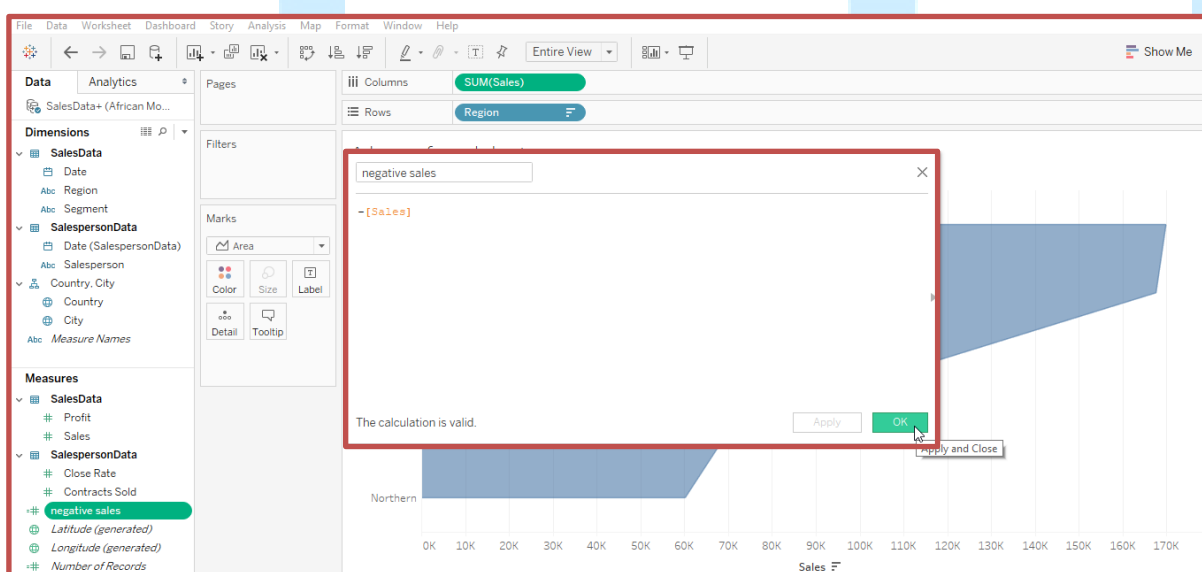


In order to show the negative sum of sales we need to create a calculated field.

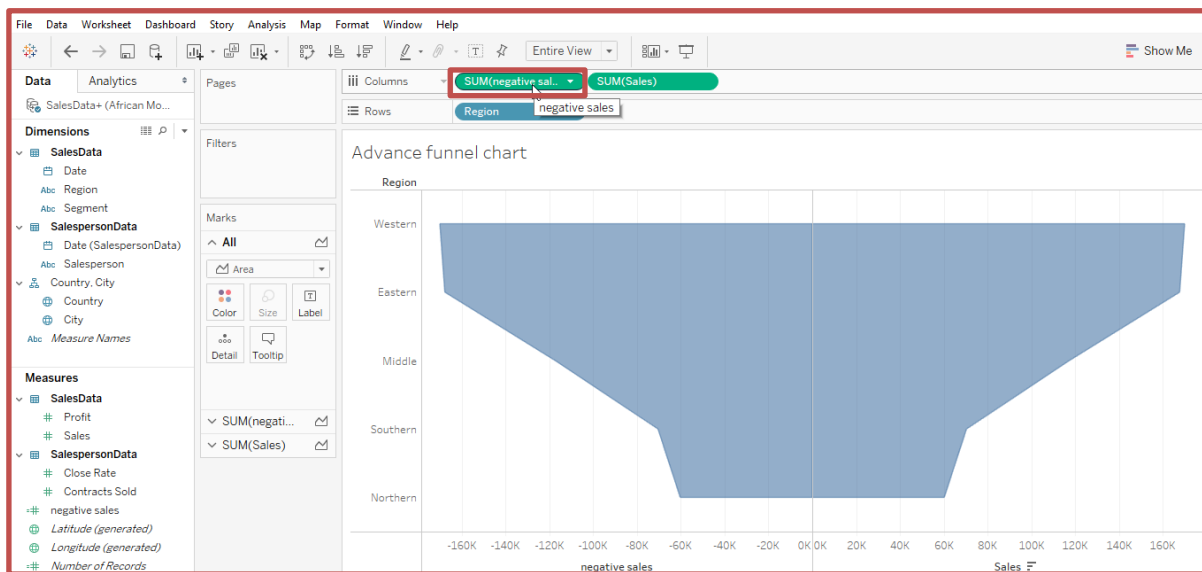
**Step 10:** To create the calculated field, click on drop down on top right next to dimensions and select Create Calculated Field.



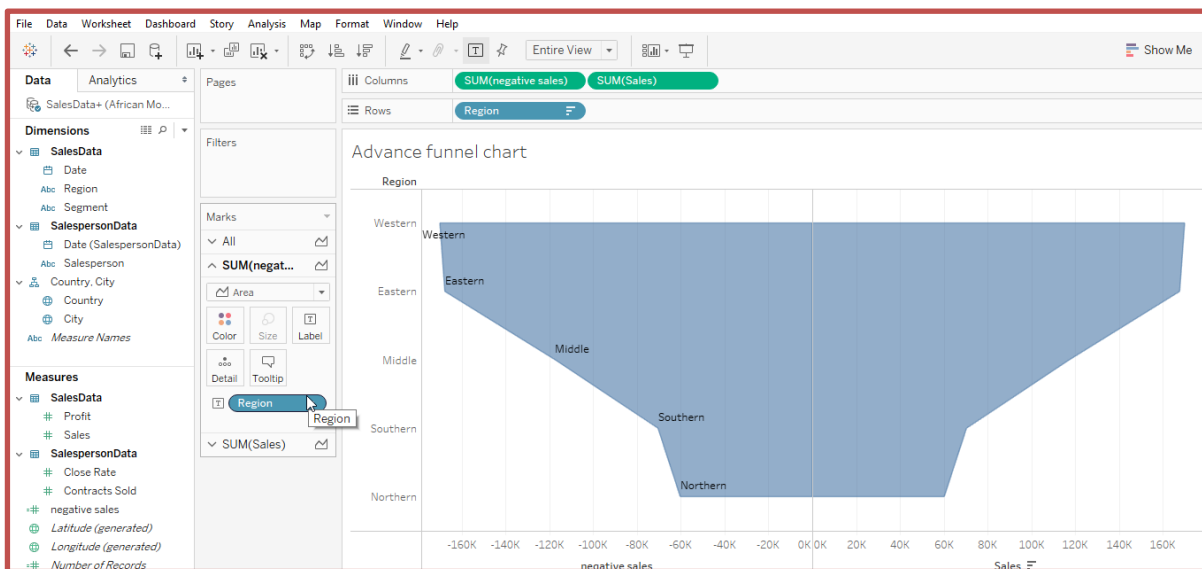
**Step 11:** Name the field as Negative sales. Add the following calculation and click ok.



## Step 12: Add negative sales to columns.

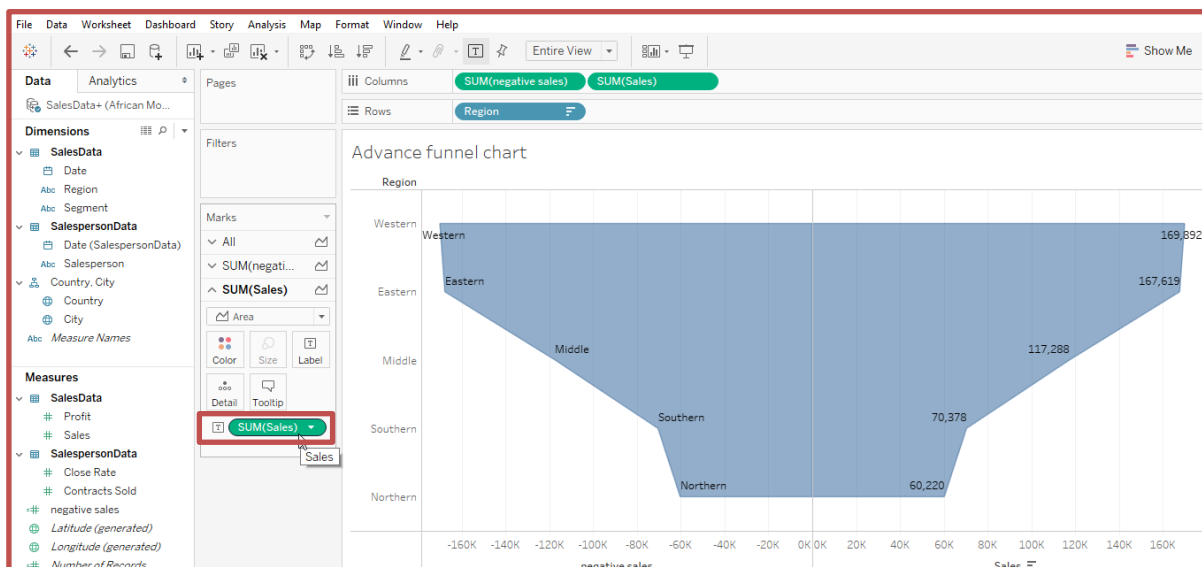


## Step 13: Add region to Label of negative sum of sales pane in marks shelf.



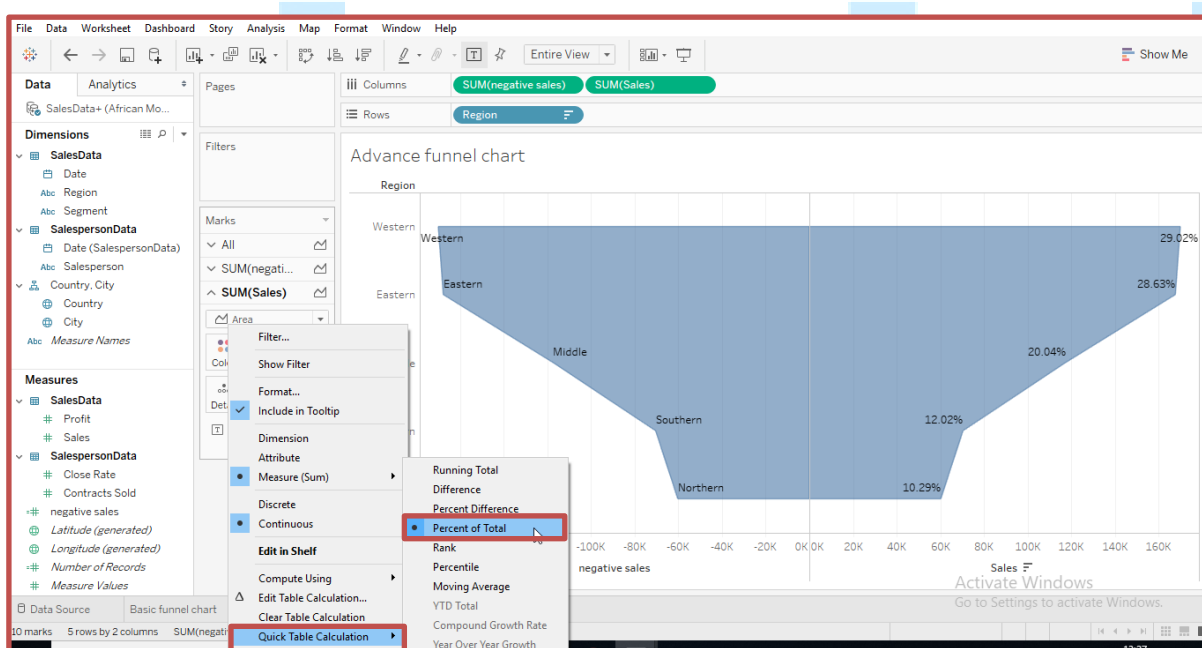


**Step 14:** Add sales to sales to Label to sales pane in marks card shelf.

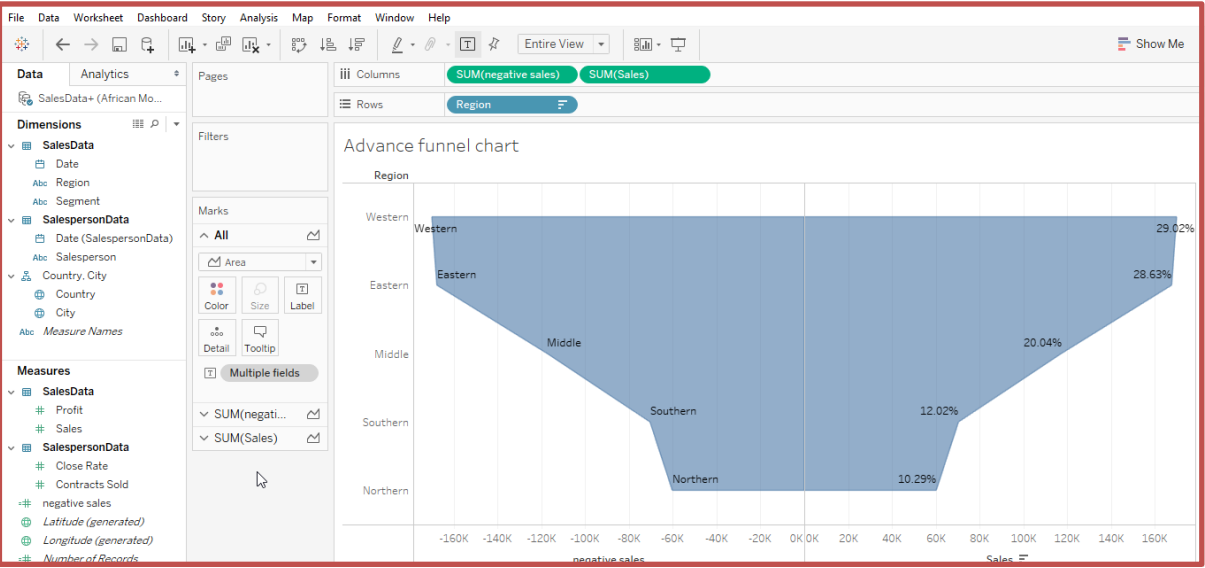


We are interested in finding the percentage.

**Step 15:** Add a quick table calculation to sales, to add table calculation click the drop down of sales and click on quick table calculation and select percent of total.



We have the required advance funnel chart visualization along with negative sales.



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