Comparison of Region Based on Sales-Tableau Project

By Prathap Chowdary Ganta

DESCRIPTION

The director of a leading organization wants to compare the sales between two regions. He has asked each region operator to record the sales data to compare by region. The upper management wants to visualize the sales data using a dashboard to understand the performance between them and suggest the necessary improvements.

Objective: Help the organization by creating a dashboard to visualize the sales comparison between two selected regions.

Datasets: Sample Superstore

Steps to Perform:

1. Select Sample Superstore as Dataset
    1. Use Sample Superstore Dataset
    2. Select Data
    3. Use Group by from Data Source Table on a Folder to create a folder to segregate the required data for Customer Name and Order ID inorder to organize the data thoroughly.
2. Create a hierarchy called Location for the variable Country.
3. Create two parameters: Primary Region and Secondary Region with all regions listed in them. Here, the primary and secondary region are the two regions where the sales are being compared.
    1. Create Parameters for Primary Region and Secondary Region
    2. Create a Calculated Field for both Primary Region and Secondary Region
4. Create a First Order Date
    1. Create a Calculated Field and name it as the First Order Date
5. Create a dashboard
    1. Align all sheets in the dashboard
6. Partition the dashboard to display the below details of Primary Region and Secondary Region

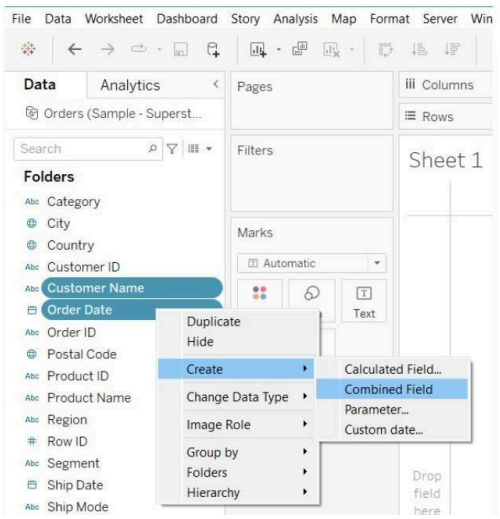
- First Order Date
- Total Sales
- Average Sales per Order
- No. of Customers
- No. of Orders
- No. of Products in Sale

Solution :

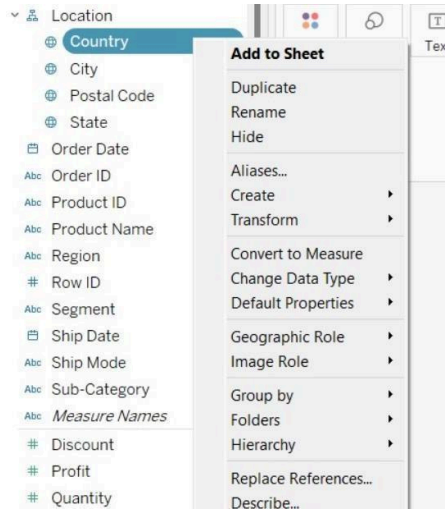
Step # 1 : Use **Sample Superstore Dataset**

1. Select **Data**
2. Use Group by from **Data Source Table** on a Folder to create a folder to segregate the required data for **Customer Name and Order ID** inorder to organize the data thoroughly.

Process Output :



Step # 2 : Create a **hierarchy called Location for the variable Country**.
Process Output :

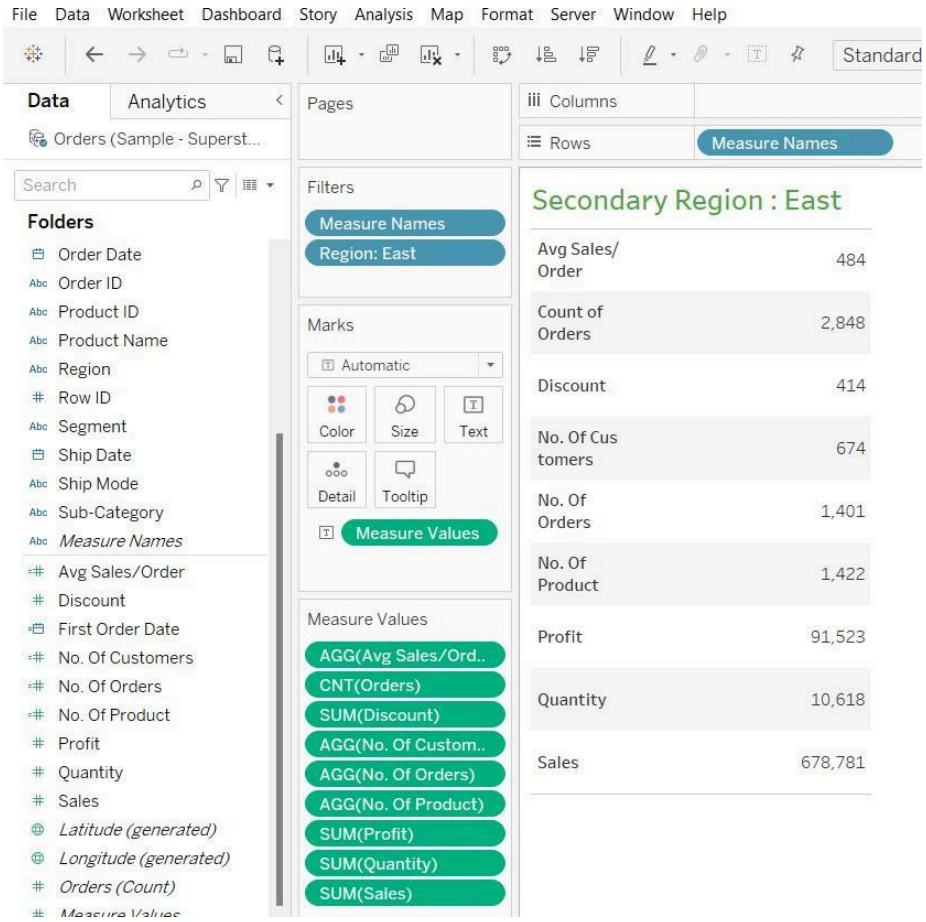


Here we have created a hierarchy by right clicking on **Country**, and then added State, **City** and **Postal Code** to the hierarchy which we have named **'Location'.**

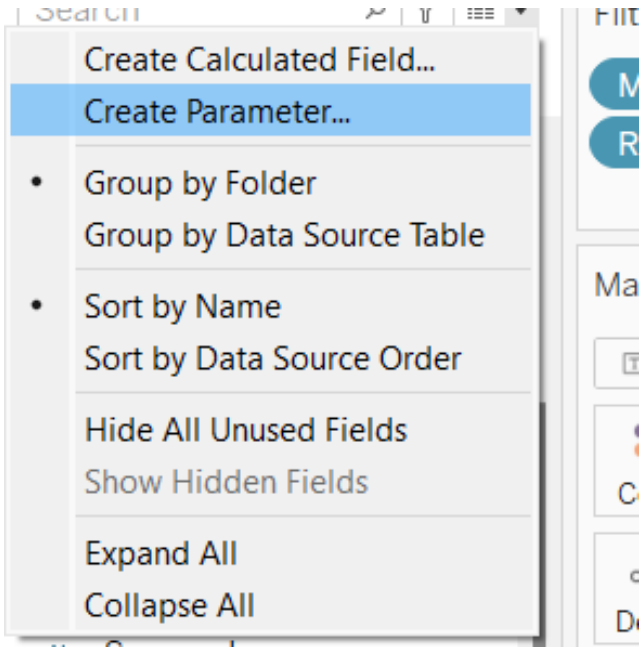
Step # 3 : Create two parameters: **Primary Region** and **Secondary Region** with all regions listed in them. Here, the primary and secondary region are the two regions where the sales are being compared.

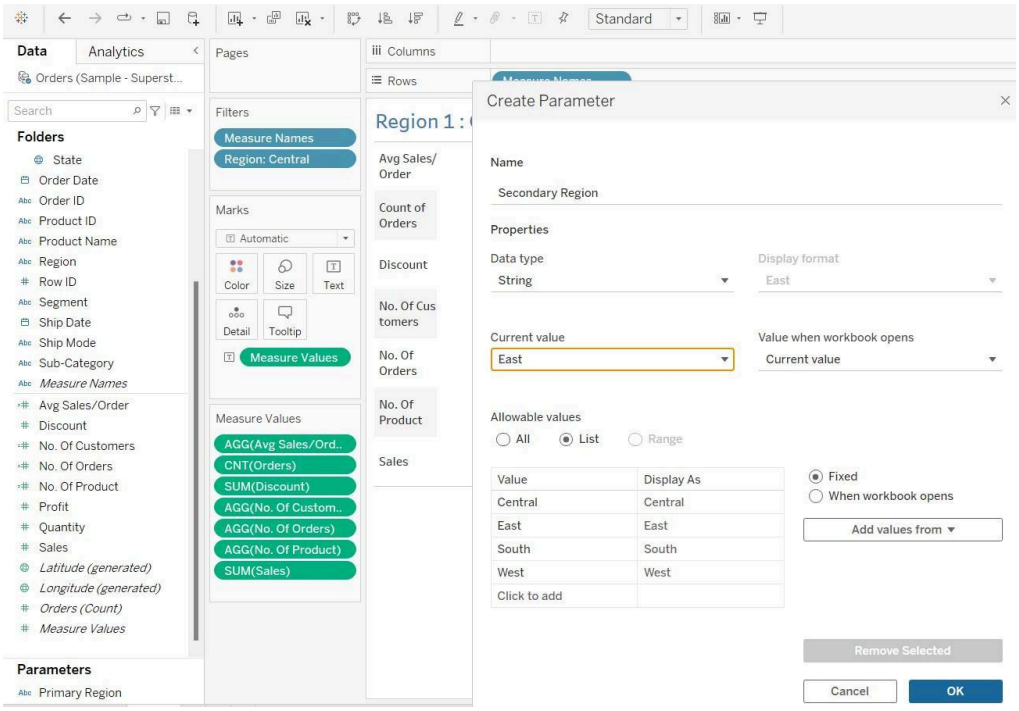
Here we have considered the Central region as the Primary Region and the East region as the Secondary Region by placing the ‘Region’ over the filter option and choosing accordingly.

Process Output :



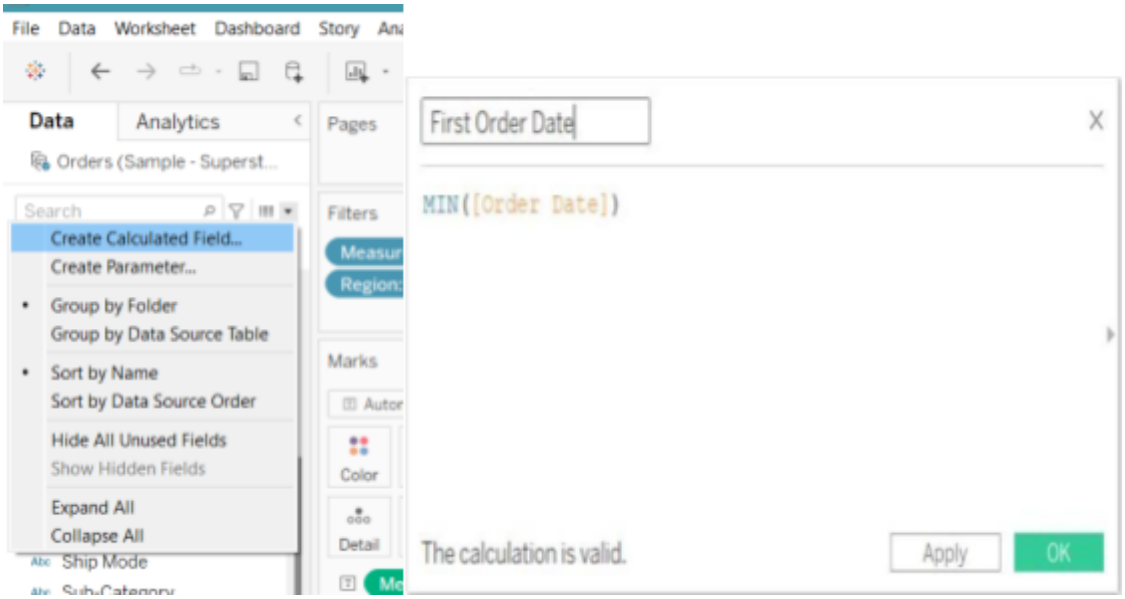
Then we have created two parameters for Primary Region (Central) and Secondary Region (East) simultaneously :


Create Calculated Field...
Create Parameter...
Group by Folder
Group by Data Source Table
Sort by Name
Sort by Data Source Order
Hide All Unused Fields
Show Hidden Fields
Expand All
Collapse All


Data
Analytics
Pages
Columns
Rows
Filters
Measure Names
Region: Central
Marks
Automatic
Color
Size
Text
Detail
Tooltip
Measure Values
Folders
State
Order Date
Order ID
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Measure Names
Avg Sales/Order
Discount
No. Of Customers
No. Of Orders
No. Of Product
Profit
Quantity
Sales
Latitude (generated)
Longitude (generated)
Orders (Count)
Measure Values
Parameters
Primary Region
Region 1 :
Avg Sales/ Order
Count of Orders
Discount
No. Of Cus tomers
No. Of Orders
No. Of Product
Sales
Create Parameter
Name
Secondary Region
Properties
Data type
String
Display format
East
Current value
East
Value when workbook opens
Current value
Allowable values
All
List
Range
Value
Display As
Central
East
South
West
Click to add
Fixed
When workbook opens
Add values from
Remove Selected
Cancel
OK

Step # 4 : Create a Calculated Field and name it as the First Order Date

Process Output :



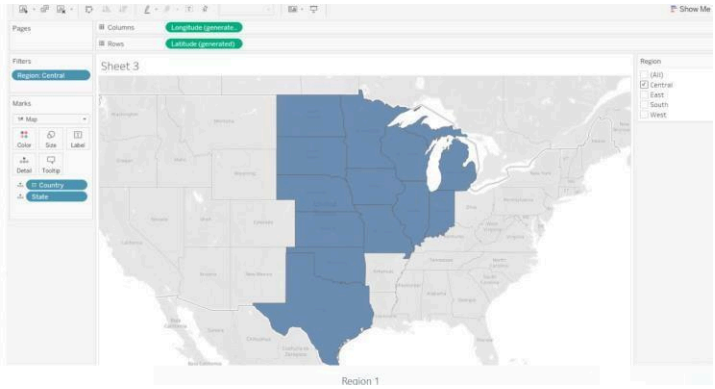
Step # 5 : Create a dashboard and align all sheets in the dashboard-

- First Order Date
- Total Sales
- Average Sales per Order
- No. of Customers
- No. of Orders
- No. of Products in Sale

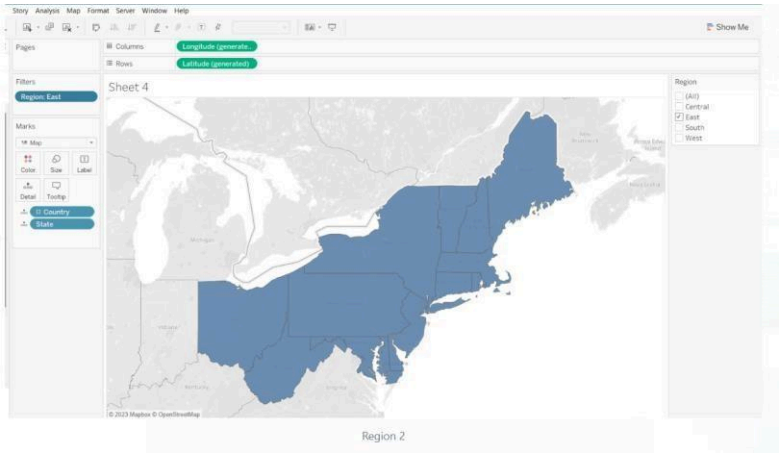
Process Output :

We have created below charts according to given conditions for both the regions :

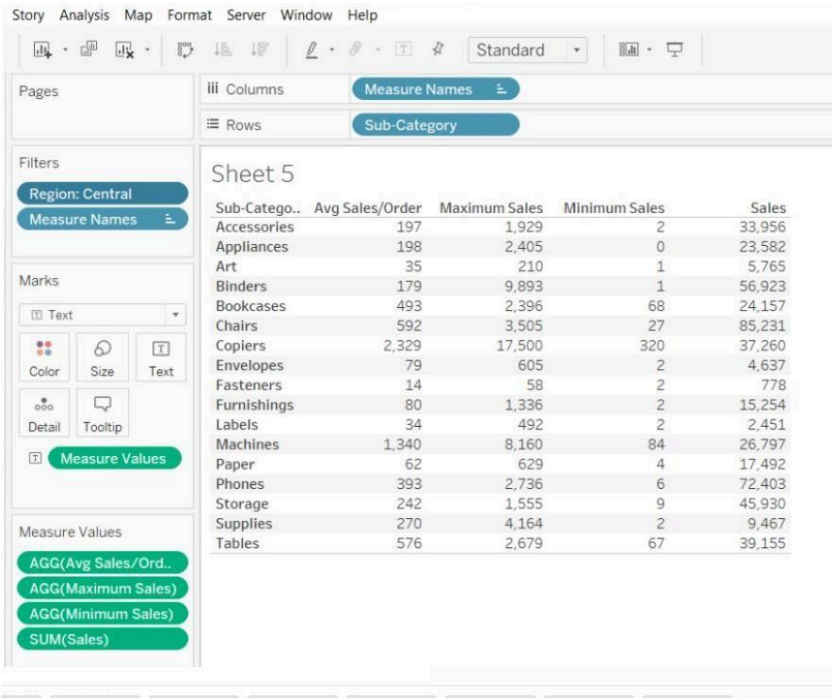
Central Region



East Region

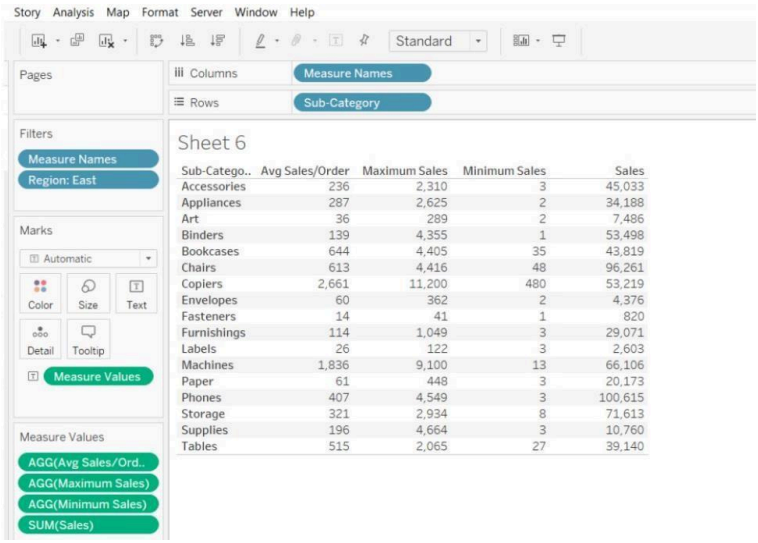


Sub-Category wise Sales (Central Region)



Sub-Catego..	Avg Sales/Order	Maximum Sales	Minimum Sales	Sales
Accessories	197	1,929	2	33,956
Appliances	198	2,405	0	23,582
Art	35	210	1	5,765
Binders	179	9,893	1	56,923
Bookcases	493	2,396	68	24,157
Chairs	592	3,505	27	85,231
Copiers	2,329	17,500	320	37,260
Envelopes	79	605	2	4,637
Fasteners	14	58	2	778
Furnishings	80	1,336	2	15,254
Labels	34	492	2	2,451
Machines	1,340	8,160	84	26,797
Paper	62	629	4	17,492
Phones	393	2,736	6	72,403
Storage	242	1,555	9	45,930
Supplies	270	4,164	2	9,467
Tables	576	2,679	67	39,155

Sub-Category wise Sales (East Region)

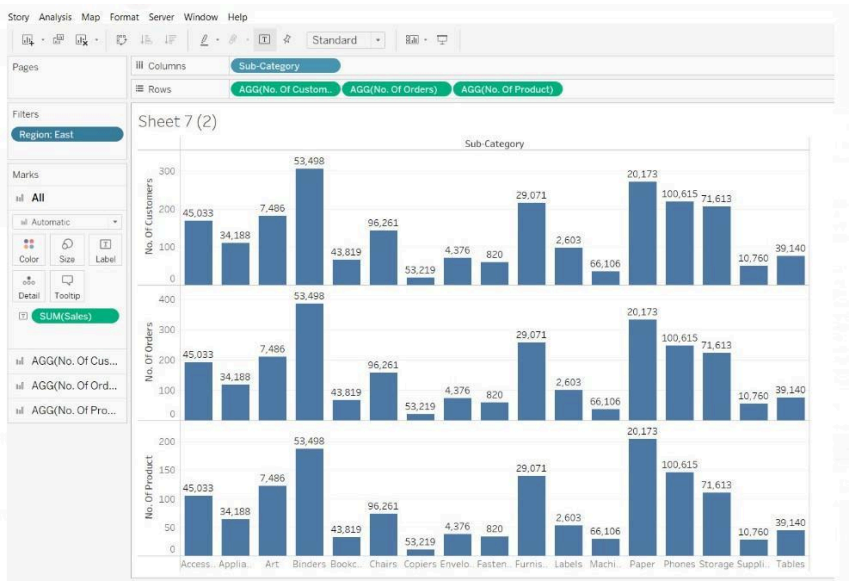


Sheet 6

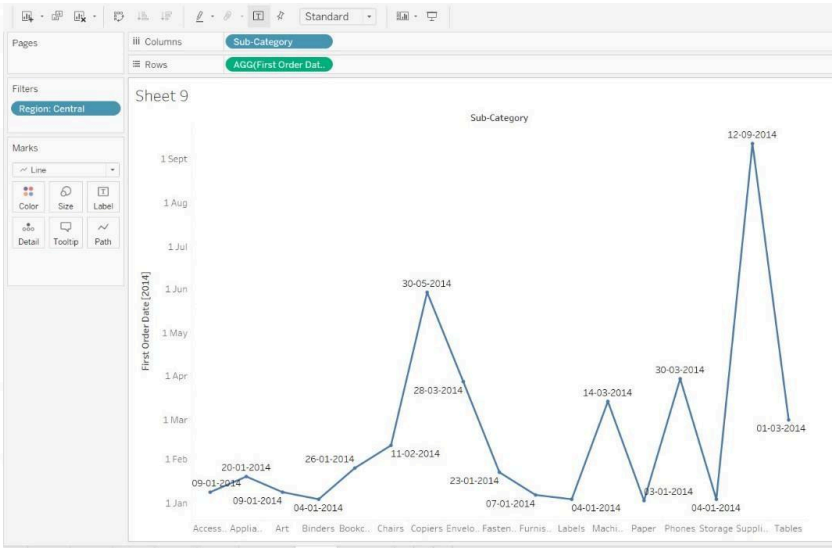
Sub-Catego..	Avg Sales/Order	Maximum Sales	Minimum Sales	Sales
Accessories	236	2,310	3	45,033
Appliances	287	2,625	2	34,188
Art	36	289	2	7,486
Binders	139	4,355	1	53,498
Bookcases	644	4,405	35	43,819
Chairs	613	4,416	48	96,261
Copiers	2,661	11,200	480	53,219
Envelopes	60	362	2	4,376
Fasteners	14	41	1	820
Furnishings	114	1,049	3	29,071
Labels	26	122	3	2,603
Machines	1,836	9,100	13	66,106
Paper	61	448	3	20,173
Phones	407	4,549	3	100,615
Storage	321	2,934	8	71,613
Supplies	196	4,664	3	10,760
Tables	515	2,065	27	39,140

Sub-Category wise Orders (Central Region)

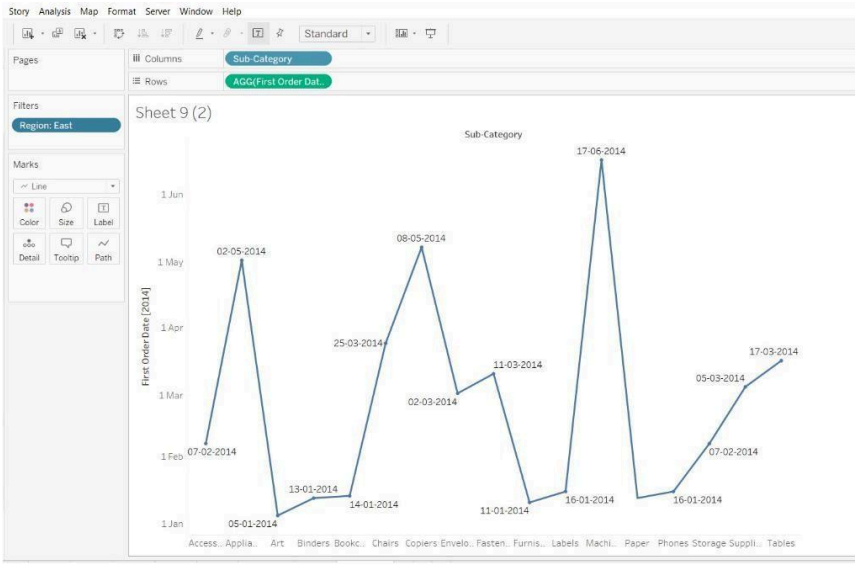
Sub-Category wise Orders (East Region)



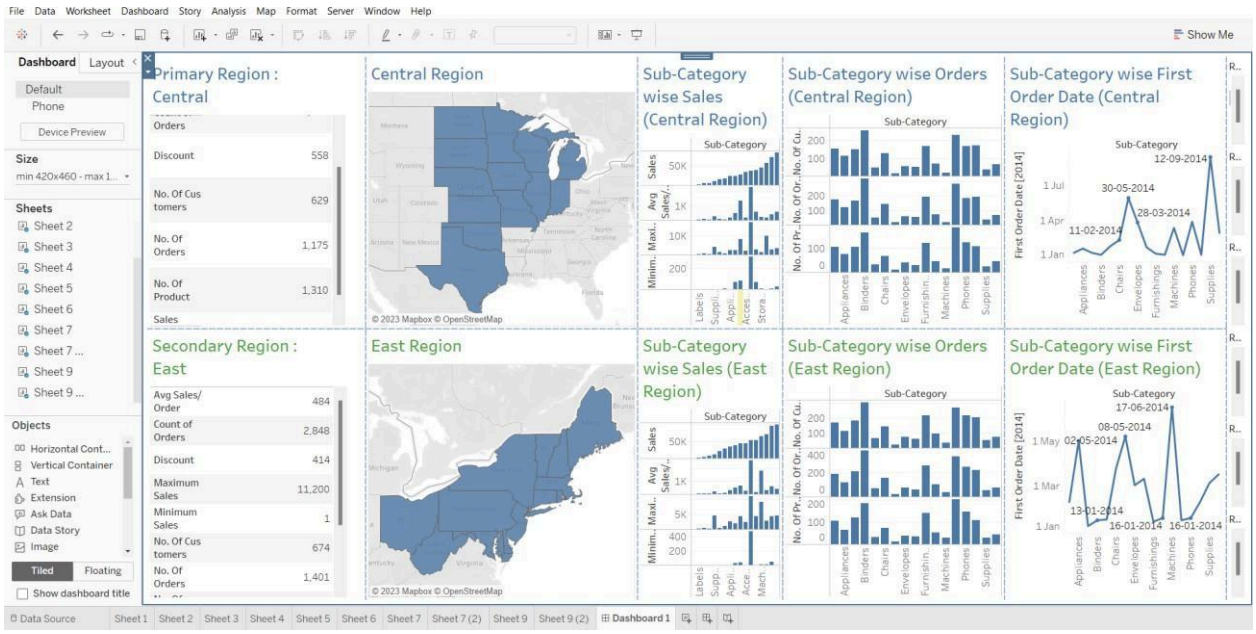
Sub-Category wise First Order Date (Central Region)



Sub-Category wise First Order Date (East Region)



Final Dashboard :



Conclusion :

In conclusion, this Tableau project has successfully demonstrated the power of data visualization in gaining insights and understanding complex information. By leveraging Tableau's interactive and intuitive features, we have been able to present data in a visually appealing and easily digestible format. The project has highlighted key trends, patterns, and correlations within the dataset, empowering stakeholders to make informed decisions. Overall, the project has showcased the immense value of Tableau as a tool for effective data analysis and storytelling.