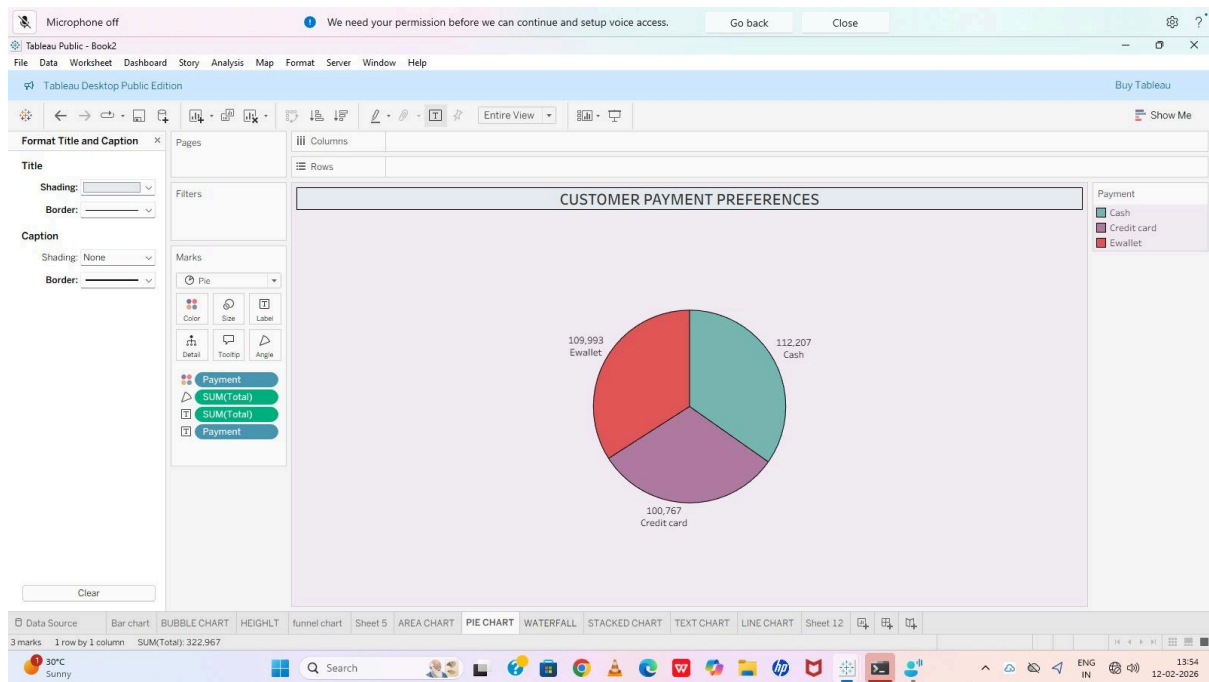# Assignment -1

Customer payment preferences

Purpose:

Pie Chart is used to:

Show the proportion of each payment method in total sales.

Compare Cash, Credit Card, and E-wallet performance.

Identify which payment method has the highest and lowest contribution.

Represent part-to-whole relationship clearly.

Step to step process

• Connect Data

Open Tableau → Load your dataset.

° Create Pie Chart

Drag Payment → Marks (Color)

Drag SUM(Total) → Angle

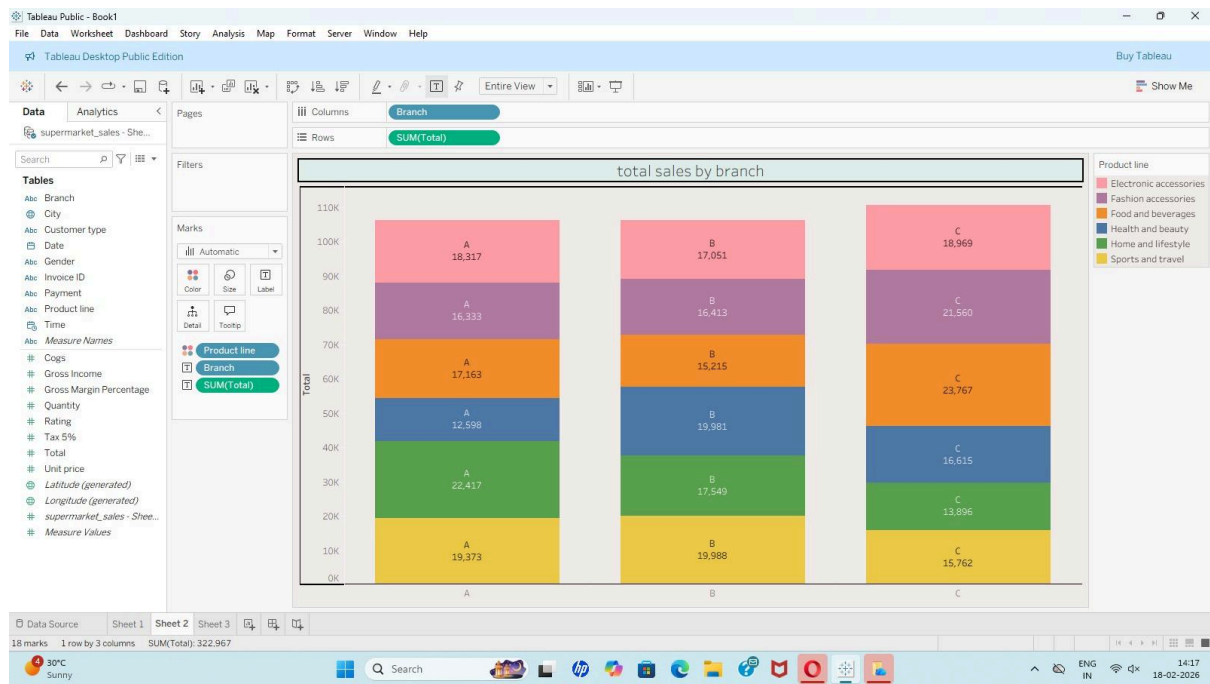Change Marks type to *Pie

•Add Labels

Drag Payment → Label

Drag SUM(Total) → Label

•Format Chart

Adjust Size of pie

Add Title → Customer Payment Preferences

Select *Entire View

A Stacked Bar Chart is used to:

Compare total sales across different branches (A, B, C).

Show category-wise contribution (Product Line) within each branch.

Identify which branch has highest overall sales.

Analyze which product category performs best in each branch

Steps to step

•Connect Data

Open Tableau → Load dataset.

•Create Basic Bar Chart

Drag Branch → Columns

Drag SUM(Total) → Rows

•Make it Stacked

Drag Product Line → Color (Marks card)

Ensure Marks type is Bar (Automatic → Bar)

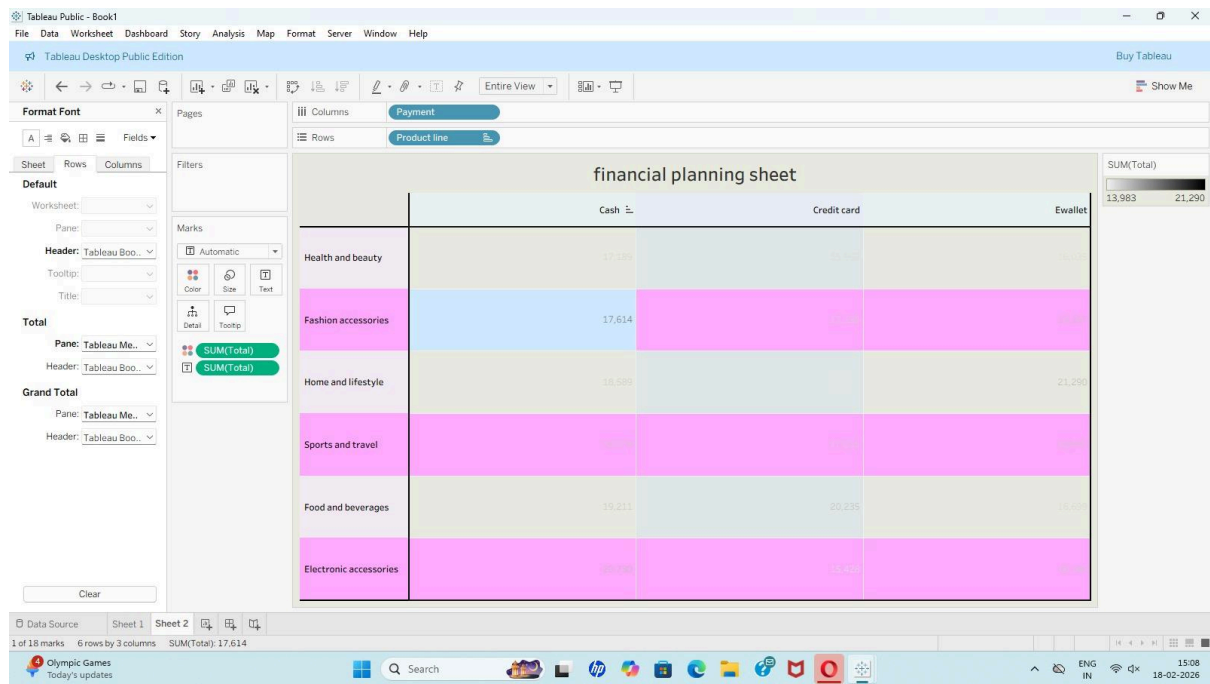Go to Analysis → Stack Marks → On (if not already stacked)

•Add Labels

Drag SUM(Total) → Label

Drag Branch → Label (optional)

° Format

Add title → Total Sales by Branch

Adjust colors and select

Compare total spending (SUM of Total) across different product lines

Analyze which payment method (Cash, Credit Card, Ewallet) is used most

Identify high and low spending categories using color intensity

Support financial planning and budgeting decisions

This type of visualization helps quickly spot:

Highest revenue product lines

Most used payment methods

Spending patterns across categories

Steps

Connect to Data

Open Tableau Public

Click Connect → Text/Excel/CSV

Load your dataset

•Create the Basic Table

Drag Product line → Rows

Drag Payment → Columns

Drag Total → Text in the Marks card

Now you'll see a basic cross-tab table.

• Convert to Highlight Table (Heatmap)

On the Marks card:

Change mark type to Square

Drag Total again → Color

(Optional) Drag Total → Label to show numbers inside cells

Or:

Click Show Me

Select Highlight Table

°Adjust Colors

Click Color → Edit Colors
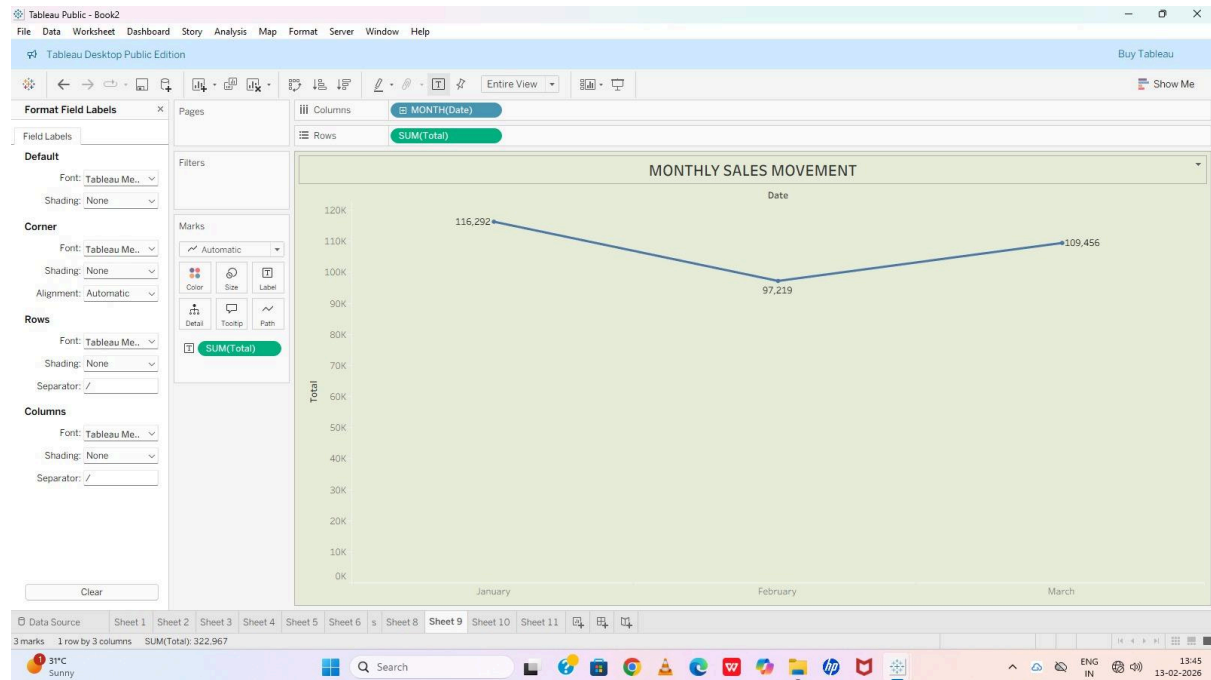
Choose a gradient (e.g., light to dark)

Click OK

Darker color = higher spending
Lighter color = lower spending
•Format the Sheet
Edit the title → rename to "Financial Planning Sheet"
Adjust:

Monthly sales movement
Purpose
•The purpose of this visualization is to:
Show monthly sales trends
°Identify increase or decrease in sales over time
Compare performance between months
•Support trend analysis and forecasting
•This chart helps businesses:
•Detect seasonal patterns
•Monitor monthly performance
•Plan inventory and marketing strategies
•Make data-driven financial decisions
•In your chart:
•January → Highest sales
°February → Drop in sales
•March → Sales increase again
Steps
•Connect to Dataset
Open Tableau Public
Load your sales dataset
• Create Basic Line Chart
Drag Date → Columns
Right-click on Date → Select Month (Discrete Month)
Drag Total → Rows
Tableau automatically creates a line chart.

• Set Mark Type (If Needed)
Go to Marks card
Select Line (if not already selected)
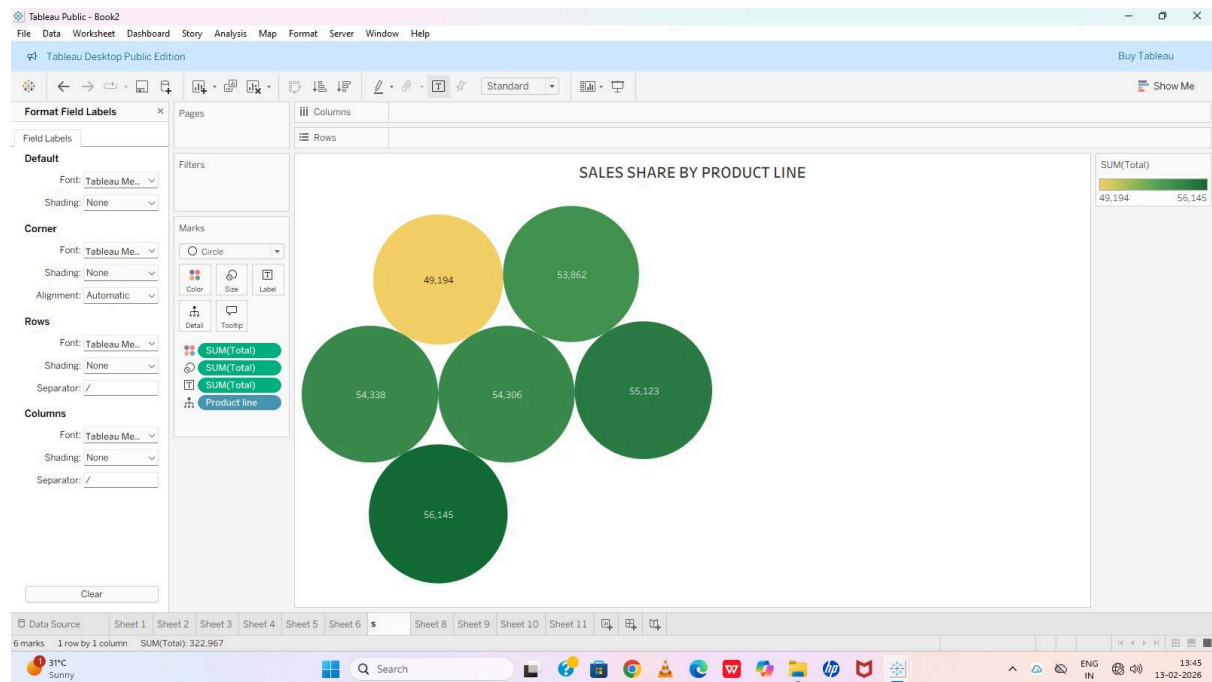• Add Data Labels
On Marks card → Click Label
Check Show Mark Labels
Now values will appear on each point.
•Format the Chart
Edit title → "MONTHLY SALES MOVEMENT"
•Format:

•Show the sales contribution of each product line
•Compare product categories based on total revenue
•Identify the highest and lowest performing product lines
•Understand overall sales distribution
•Why this chart is useful:
Bigger bubble → Higher sales
•Smaller bubble → Lower sales
•Helps management focus on top-performing categories
•Supports strategic planning and product decisions
Steps
•Connect to Dataset
°Open Tableau Public
°Load your sales dataset
•Create Packed Bubble Chart
°Method 1 (Easiest – Using Show Me):
°Drag Product line → Marks (Detail)
°Drag Total → Marks (Size)
°Click Show Me
Select Packed Bubbles
•Manual Method (Alternative)

°Change Marks type to Circle
Drag:
Product line → Detail
°SUM(Total) → Size
°SUM(Total) → Label
°SUM(Total) → Color (optional for gradient)
•Adjust Size
On Marks card → Click Size
Increase slider to make bubbles clearer
•Add Labels
Click Label
Check Show Mark Labels
Format font for better visibility
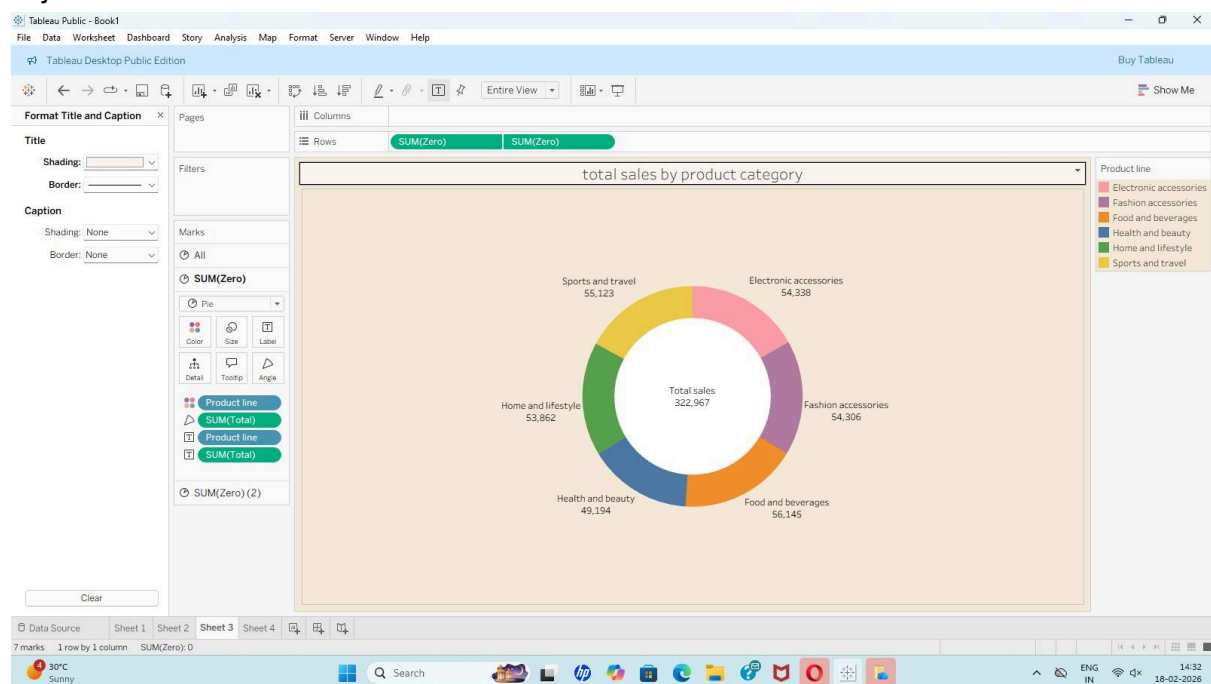• Edit Colors
Click Color → Edit Colors
•Choose single color or gradient scale
Darker shade = higher sales
•Format the Sheet
Edit title → "SALES SHARE BY PRODUCT LINE"
Adjust:

•The purpose of this visualization is to:
Show sales distribution across product categories
°Compare each category's contribution to total sales
°Highlight the highest and lowest performing product lines
°Display the overall total sales in the center
Why a Donut Chart is useful:
°Clearly shows proportion/share
Attractive for dashboards
°Displays total value in the middle

•Easy comparison of category contributions

In your chart:

•Food and Beverages → Highest sales

•Health and Beauty → Lower compared to others

•Center shows overall total = 322,967

Steps

Step • Create a Pie Chart

Drag Product line → Marks (Color)

Drag SUM(Total) → Marks (Angle)

Change Marks type → Pie

Drag SUM(Total) → Label (to show values)

Now you have a normal pie chart.

Step ° Create a Dummy Field (for Donut Effect)

Create a Calculated Field:

Name it Zero

Formula:

Copy code

0

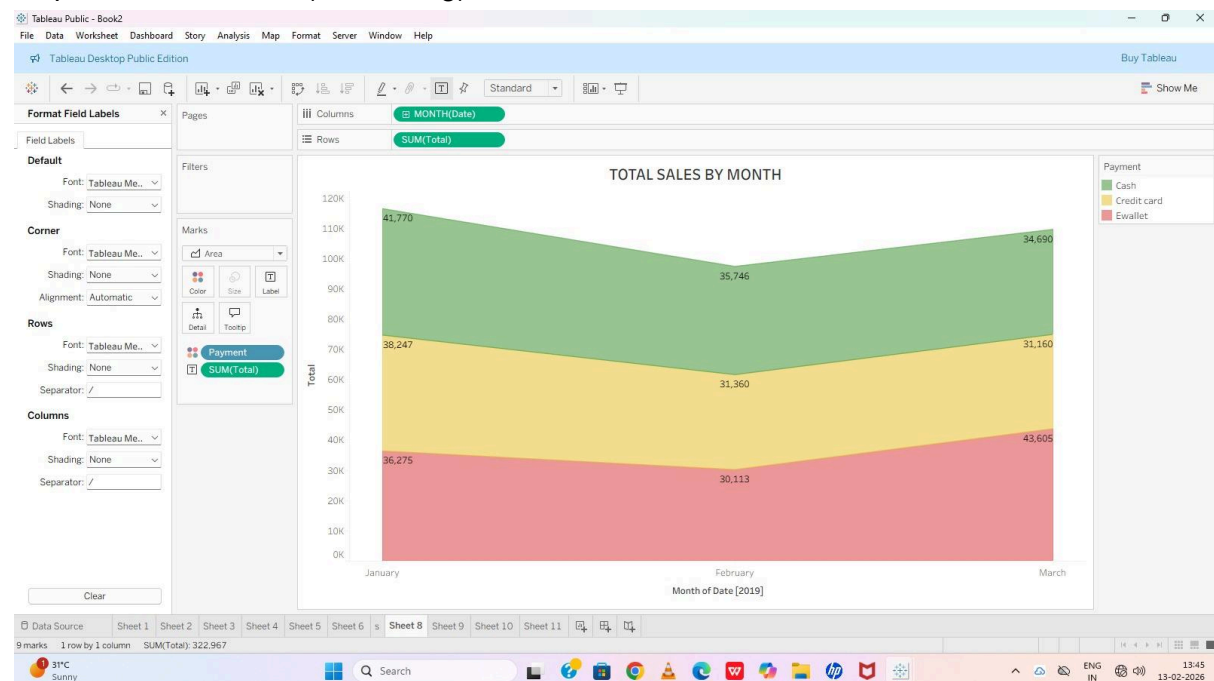Click OK.

Step ° Create Dual Axis

Drag SUM(Zero) → Rows (twice)

Right-click second SUM(Zero) → Dual Axis

Right-click axis → Synchronize Axis

Hide headers

Step •Format First Pie (Outer Ring)

Purpose

•Visualize monthly sales trends over a time

qperiod.

°Compare total sales across months (January, February, March).

Analyze contribution of each payment method (Cash, Credit Card, E-wallet).

Identify peak and low sales months.

•Understand payment method performance trends.

•Show cumulative sales using a stacked area format.

•Support business decisions related to payment preferences and

Steps to steps

1Connect to Data Source

Open Tableau → Connect to your dataset containing Date, Total Sales, Payment Type.

2Drag Date to Columns Shelf

Convert it to MONTH(Date) (Discrete or Continuous as needed).

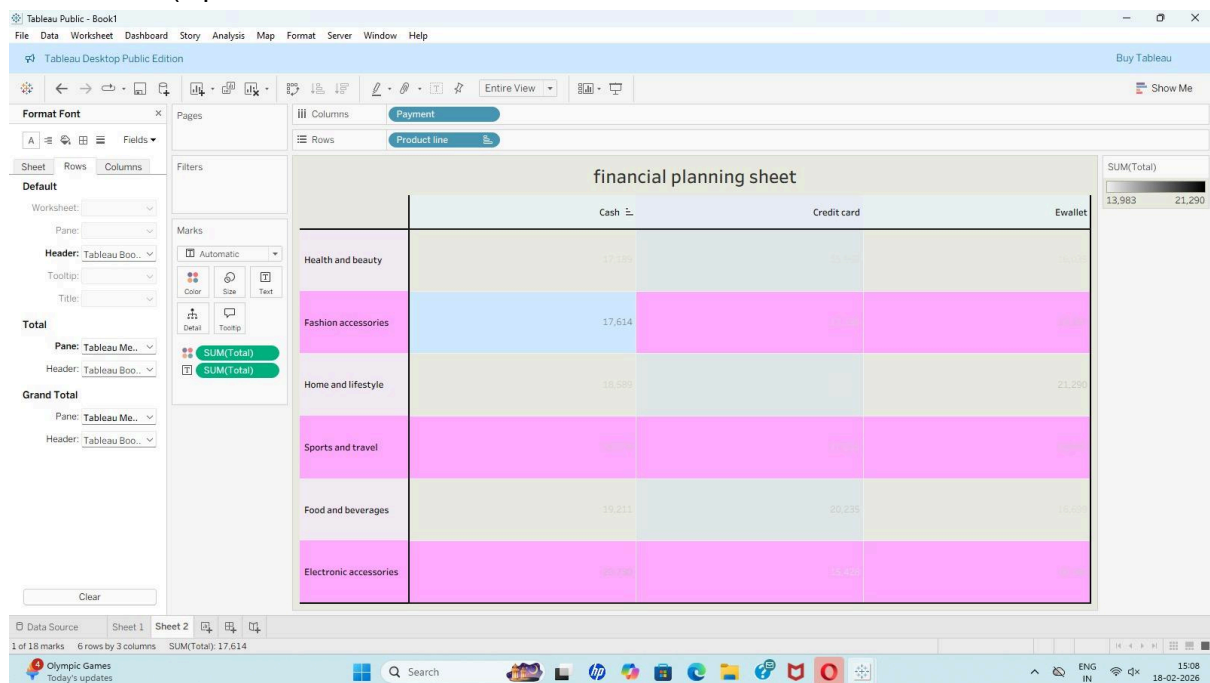4Drag Total to Rows Shelf

Ensure it is aggregated as SUM(Total).

4Change Chart Type to Area Chart

•In the Marks card → Select Area.

°Add Payment to Color

5Drag Payment field to the Color section in Marks •to create stacked areas.

•Add Labels (Optional

1To analyze financial performance by product
line.

2To coare sales across different payment methods (Cash, Credit Card, E-wallet).

3To identify high and low sales combinations using color intensity.

4To support financial planning and budgeting decisions.

5To detect top-performing product categories.

6To understand customer payment preferences.

7To present summarized data in an easy-to-read visual format.

Steps to steps

1Connect to Dataset

Open Tableau → Connect to your data (fields 2needed: Product Line, Payment, Total).

3Drag Fields to Shelves

Drag Payment → Columns shelf.

4Drag Product Line → Rows shelf.

Add Measure
5Drag Total → Text on Marks card.
°Ensure aggregation is SUM(Total).
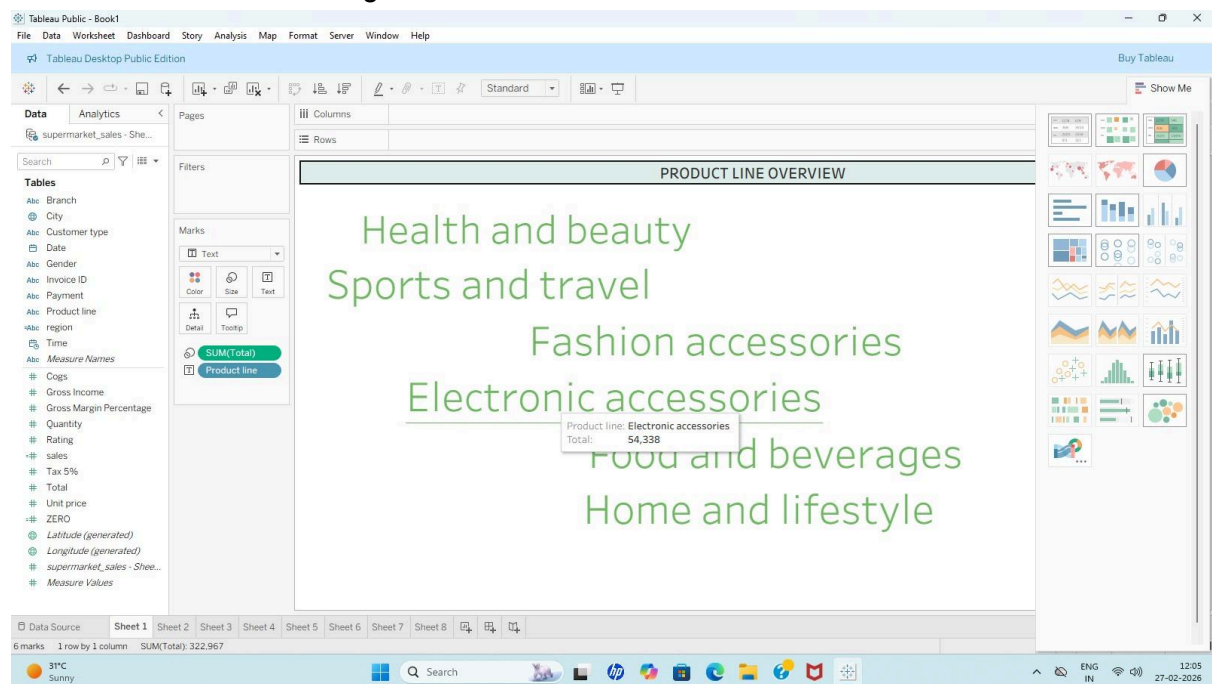°Create Highlight Table (Heat Map)
°Click Show Me → Select Highlight Table

°Change Marks type to Square.
°Drag SUM(Total) → Color.
•Adjust Colors
6Format the Sheet
•Add title: Financial Planning Sheet

Product line summary
1To display a summary of product lines in a simple visual format.
2To highlight product categories based on total sales.
3To quickly identify high-performing product lines (larger text = higher sales).
4To present data in a clean and easy-to-understand layout.
5To support business decision-making and product analysis.
6To compare overall performance of different product categories.
7To create a visually attractive summary dashboard element
Steps to steps
1Open Tableau → Connect to dataset containing °Product Line and Total.
2Drag Measure to View
°Drag SUM(Total) to the Marks card.
3Change Marks Type
°Select Text from the Marks drop-down.
°Add Dimension
4Drag Product Line to the Text area in the Marks card.
•Adjust Size
5Drag SUM(Total) to Size on Marks to create °larger text for higher sales (Word Cloud effect).

°Format the Sheet
6Add title: Product Line Summary.
7Increase font size and adjust alignment.
°Clean the Layout
8Remove gridlines and headers for better presentation.

Sales funnel by payment
1.To analyze total sales by product line.

To compare performance of different product categories.

2To identify top-performing and low-performing products.

3To visualize sales in a funnel-style ranking format.

4To support sales and marketing strategy decisions.

5To track contribution of each product line to overall revenue.

6To present data clearly using a simple bar comparison chart.

Steps to steps

1Connect to Dataset

Open Tableau → Connect to data containing 2Product Line and Total.

°Drag Fields to Shelves

°Drag Product Line → Rows shelf.

•Drag Total → Columns shelf (ensure it is °SUM(Total)).

3Choose Bar Chart

°In Marks card, select Bar

OR

4Click Show Me → Choose Horizontal Bar Chart.

Sort the Bars

°Click Sort (descending) to arrange from highest to °lowest sales (funnel effect).

°Add Labels (Optional)

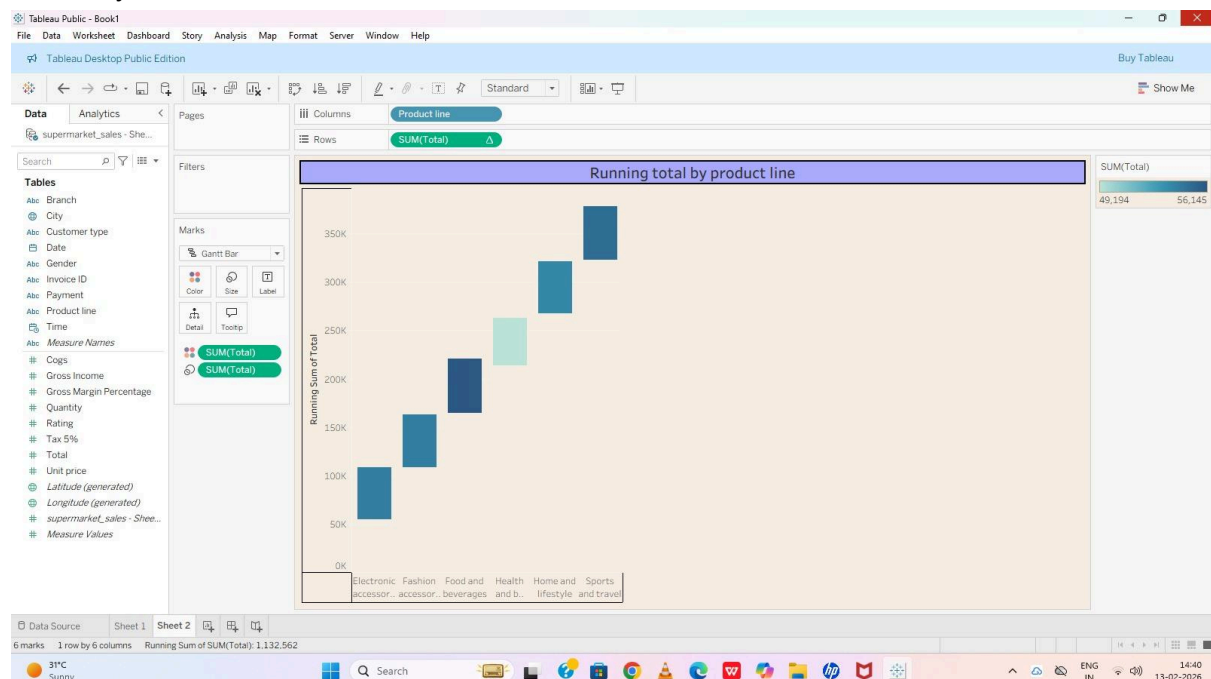5Drag SUM(Total) to Label to display values.

Format the Chart

°Add title: Sales Funnel by Payment.

°Adjust colors and axis formatting.

6Enhance Visualization (Optional)

°Add Payment as a filter if needed

Running total by product line

1To show the cumulative (running) total sales across product lines.

2To understand how each product line contributes to overall revenue.

3To visualize the step-by-step growth of total sales.

4To identify which category adds the largest incremental value.

5To track overall business performance progressively.

6To support financial and revenue analysis.

7To present cumulative data in a clear waterfall-style format.

Steps to steps

1Connect to Dataset

°Open Tableau → Connect to data containing 2Product Line and Total.

°Drag Fields to Shelves

°Drag Product Line → Columns shelf.

°Drag SUM(Total) → Rows shelf.

3Apply Running Total

°Click the drop-down on SUM(Total) in Rows.

°Select Quick Table Calculation → Running Total.

4Change Chart Type

°In the Marks card, select Gantt Bar.

5Create Waterfall Effect

°Drag SUM(Total) again to Size on the Marks card.

(If needed) Adjust table calculation direction → Compute using Product Line.

6Sort Product Line

°Sort in ascending/descending order for better flow.

7Format the Chart