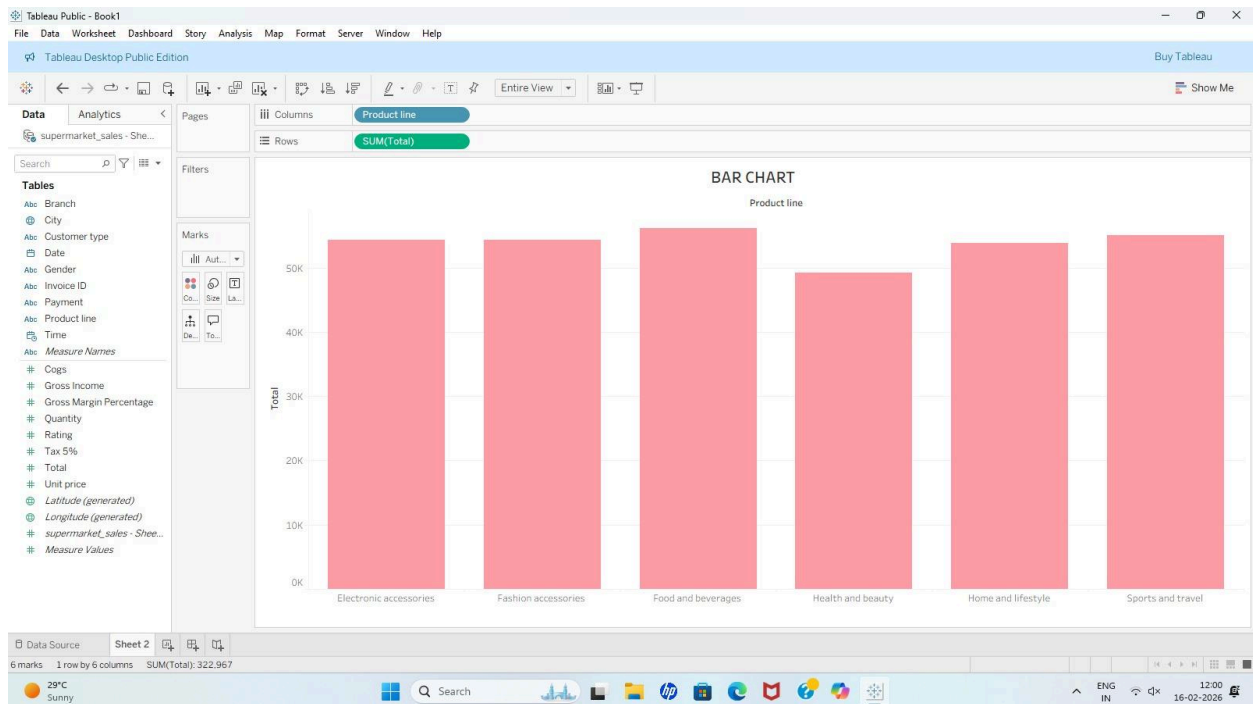# ASSIGNMENT 1
BAR CHART

Purpose:

A Bar Chart is a graph used to compare different categories using rectangular bars.The height or length of each bar represents the value of that category.It is mainly used to show comparisons clearly easily between groups.

Steps:

● Open a new worksheet in Tableau.
● Drag Product line → Columns shelf.
● Drag SUM(Total) → Rows shelf.
● In the Marks card, keep chart type as Bar (Automatic).
● Drag Product line → Color (optional, for different colors).
● Drag SUM(Total) → Label to show values on bars.
● Click on Title and rename it as Sales performance by product category.
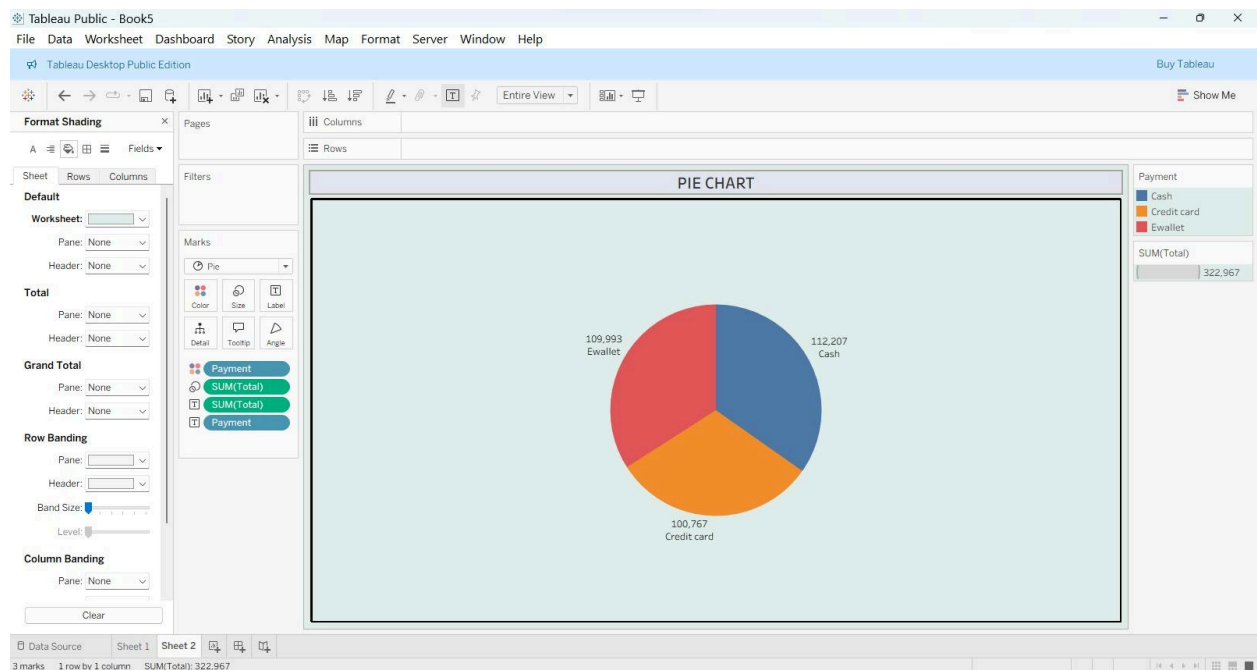● Select Fit → Entire View and adjust formatting if needed

PIE CHART

Purpose:

A Pie Chart is a circular graph used to show the percentage distribution of different categories in a dataset. Each slice of the pie represents a category, and its size shows the proportion of the total value.

Steps:

● Open a new worksheet in Tableau.
● In the Marks card, change the chart type to Pie.
● Drag Payment → Color on the Marks card.
● Drag SUM(Total) → Angle.
● Drag SUM(Total) → Label and enable Show Mark Labels.
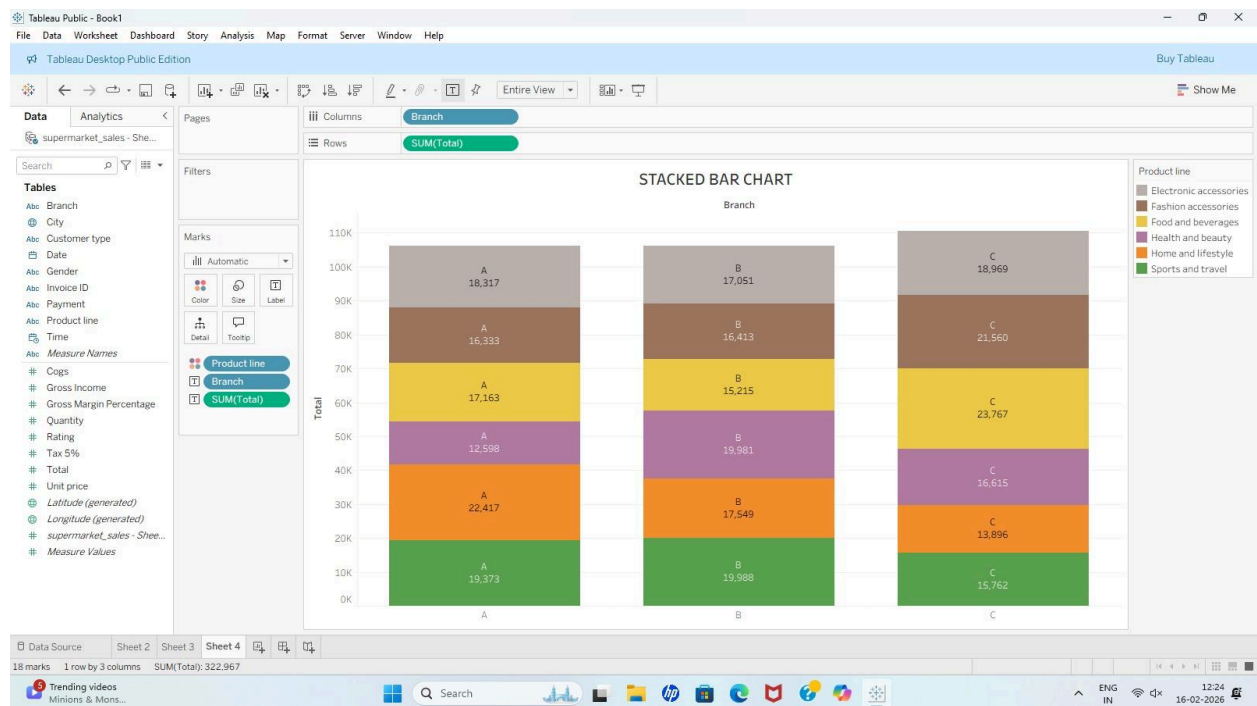● Click on Title and rename it as PAYMENT WISE SALES.

STACKED BAR CHART

Purpose:

A Stacked Bar Chart shows total value and its parts in one bar.It helps compare categories and their breakdown together.

Steps:

● Open a new worksheet in Tableau.

● Drag Branch → Columns shelf.

● Drag SUM(Total) → Rows shelf.

● Drag Product line → Color on the Marks card (this creates stacked bars).

● Drag SUM(Total) → Label to display sales values inside bars.

● In the Marks card, keep the chart type as Bar (Automatic).

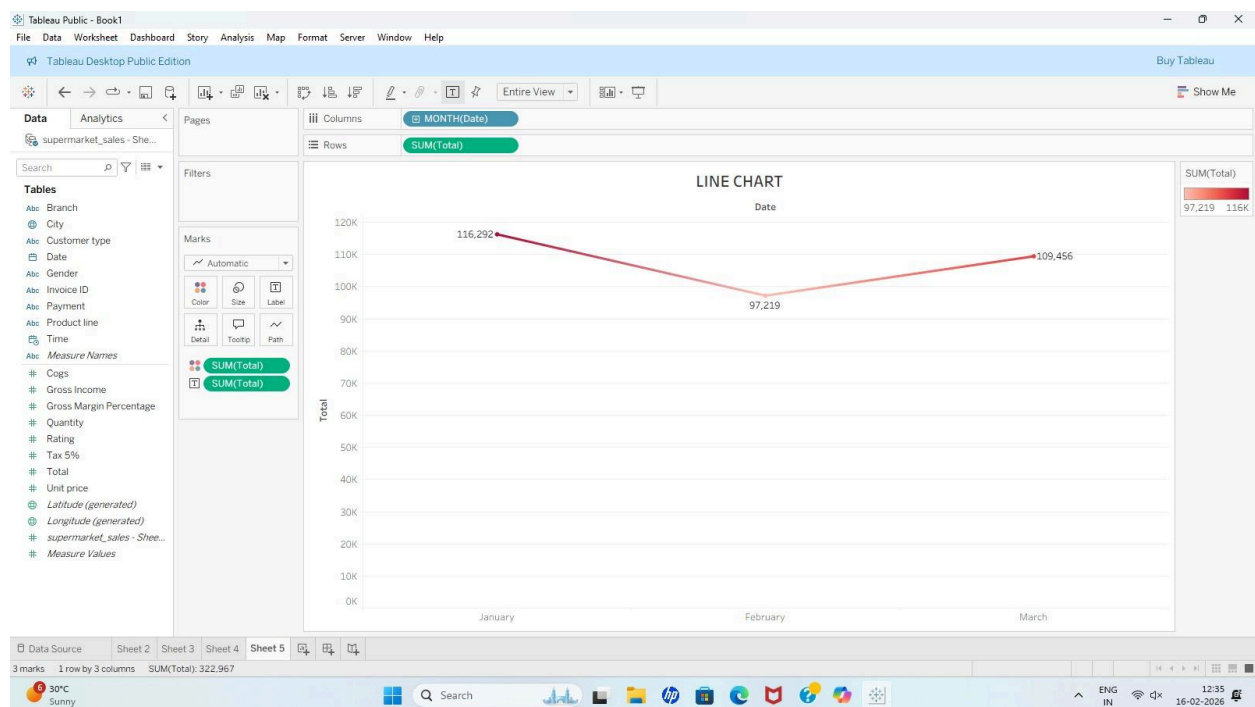● Click on Title and rename it as SALES DISTRIBUTION ACROSS BRANCHE

LINE CHART

Purpose:

A Line Chart is used to show trends or changes over time.It helps in identifying growth, decline, or patterns in data across months or years.

Steps:

● Open a new worksheet in Tableau.
● Drag Date → Columns shelf.
● Click on the Date pill and select Month (Continuous Month).
● Drag SUM(Total) → Rows shelf.
● In the Marks card, change chart type to Line (if not automatic).
● Drag SUM(Total) → Label to display values on the line.
● Click on Title and rename it as MONTHLY SALES TREND.
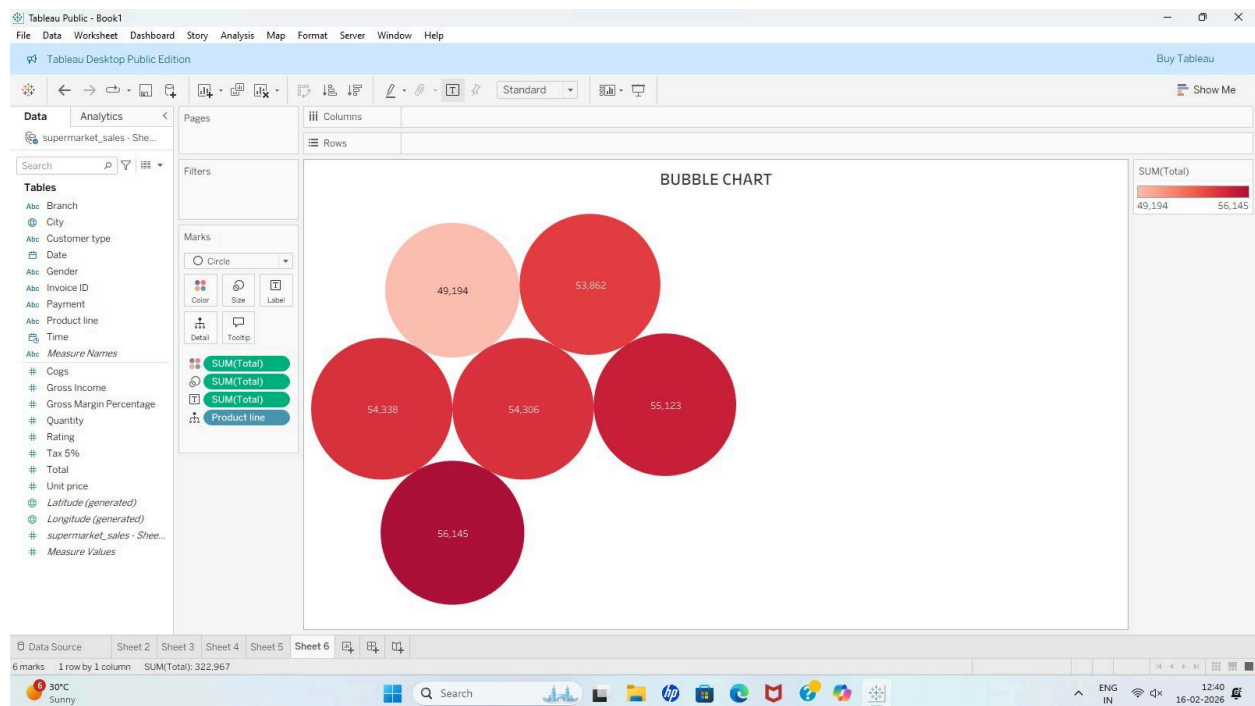● Select Fit → Standard / Entire View and adjust formatting if needed

BUBBLE CHART

Purpose:

A Bubble Chart is used to compare data using circles of different sizes.It shows relationships between variables and highlights larger or smaller values clearly.

Steps:

● Open a new worksheet in Tableau.
● Drag Product line → Detail on the Marks card.
● Drag SUM(Total) → Size (to create different bubble sizes).
● Drag SUM(Total) → Color (for color intensity).
● Drag SUM(Total) → Label to display revenue values.
● In the Marks card, change chart type to Circle.
● Adjust Size slider to increase bubble size.
● Click on Title and rename it as REVENUE BY PRODUCT LINE.
● Select Fit → Entire View and format colors if needed

DONUT CHART

Purpose:
A Donut Chart is used to show the percentage distribution of categories in a circular format with a hole in the center.It helps display each category's share of the total clearly.

Steps:
Open a new worksheet in tableau
● Drag Ship Mode to Color on the Marks card.
● Drag Order ID to Angle and change it to COUNT.
● Drag Order ID to Label → Quick Table Calculation → Percent of Total.
● Change Marks type to Pie.
● Create calculated field → Type 0 and name it Zero.
● Drag Zero to Columns two times.
● Right-click second Zero → Select Dual Axis.
● Synchronize Axis and hide headers.
● In the second Marks card:
○ Change Marks type to Circle.
○ Remove Ship Mode from this card.
○ Set color to White.
○ Increase size to create donut hole effect.
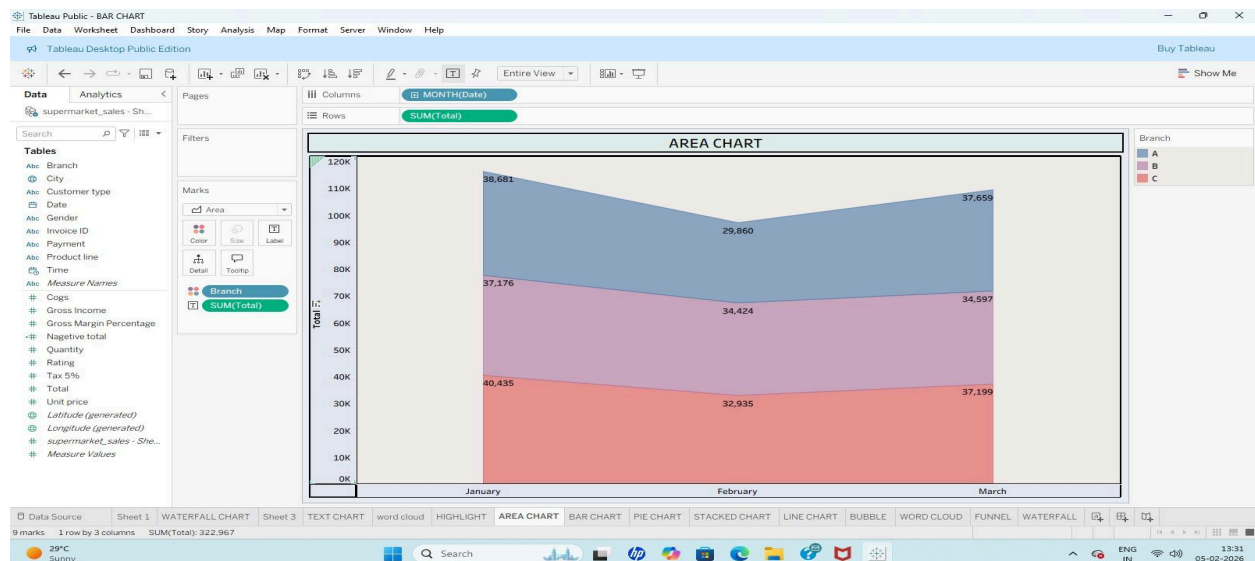● Adjust size, format labels (percentage), and add a proper chart title

Order Distribution by Shipping Type

Standard Shipping
34.400%

First Class
31.100%

Second Class
34.500%

AREA CHART

Purpose:
An Area Chart is used to show trends over time along with the magnitude
of values.
It highlights overall growth or decline and shows the volume of data clearly.

Steps:
● Open a new worksheet in Tableau.
● Drag Date to Columns → Change to Month (Continuous).
● Drag Total Sales (Total) to Rows.
● Change Marks type to Area.
● Drag Payment to Color (to create stacking by payment method)
● Drag SUM(Total) to Label (optional for values display).
● Ensure Analysis → Stack Marks → On is selected.
● Format the chart:
○ Adjust colors for Cash, Credit Card, E-wallet.
○ Format axis (Thousands format if needed).
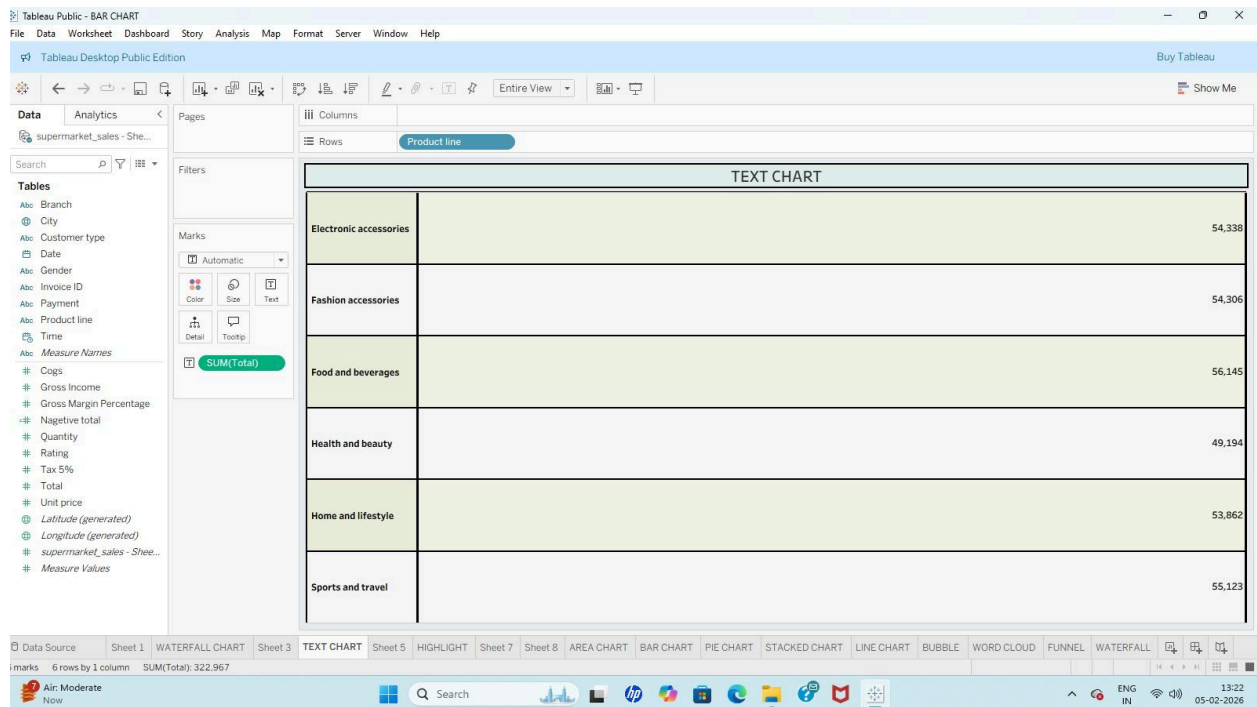○ Add proper chart title.
○ Fit → Entire View.

TEXT CHART

Purpose:

A Text Table is used to display exact numerical values in rows and columns
It helps in showing detailed data clearly without graphical representation.

Steps:

● Open a new worksheet in Tableau.
● Drag Product Line to Rows.
● Drag SUM(Total) to Text on the Marks card.
● Ensure Marks type is set to Text (Automatic).
● (Optional) Drag Product Line to Color for better visualization.
● Format numbers (Right-click SUM(Total) → Format → Number → Currency/Number).
● Click Title and rename it as Total Sales by Product Line.
● Select Fit → Entire View for proper alignment.
● Adjust borders and shading from Format → Borders/Shading if
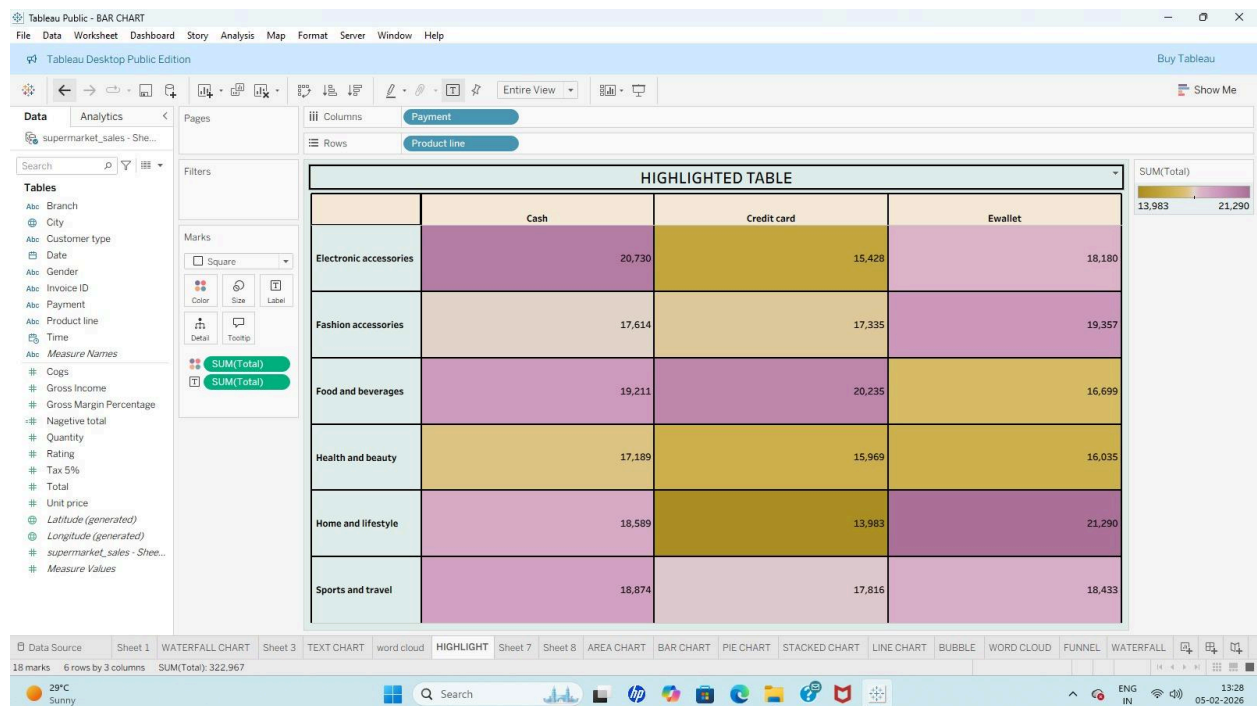
HIGHLIGHTED CHART

Purpose:
A Highlight Chart (Highlight Table) is used to show data with color shading based on values.
It helps quickly identify high and low values using color intensity.

Steps:
● Open a new worksheet in Tableau.
● Drag Payment to Columns.
● Drag Product line to Rows.
● Drag SUM(Total) to Color on the Marks card.
● Drag SUM(Total) again to Label to display values inside squares.
● In Marks dropdown, select Square.
● Click Size and increase the slider to fill the entire cell.
● Click Color → Edit Colors and choose a suitable color palette.
● Format numbers if required (Right-click SUM(Total) → Format → Number).
● Add title: Product Line Sales by Payment.
● Select Fit → Entire View for proper alignment.
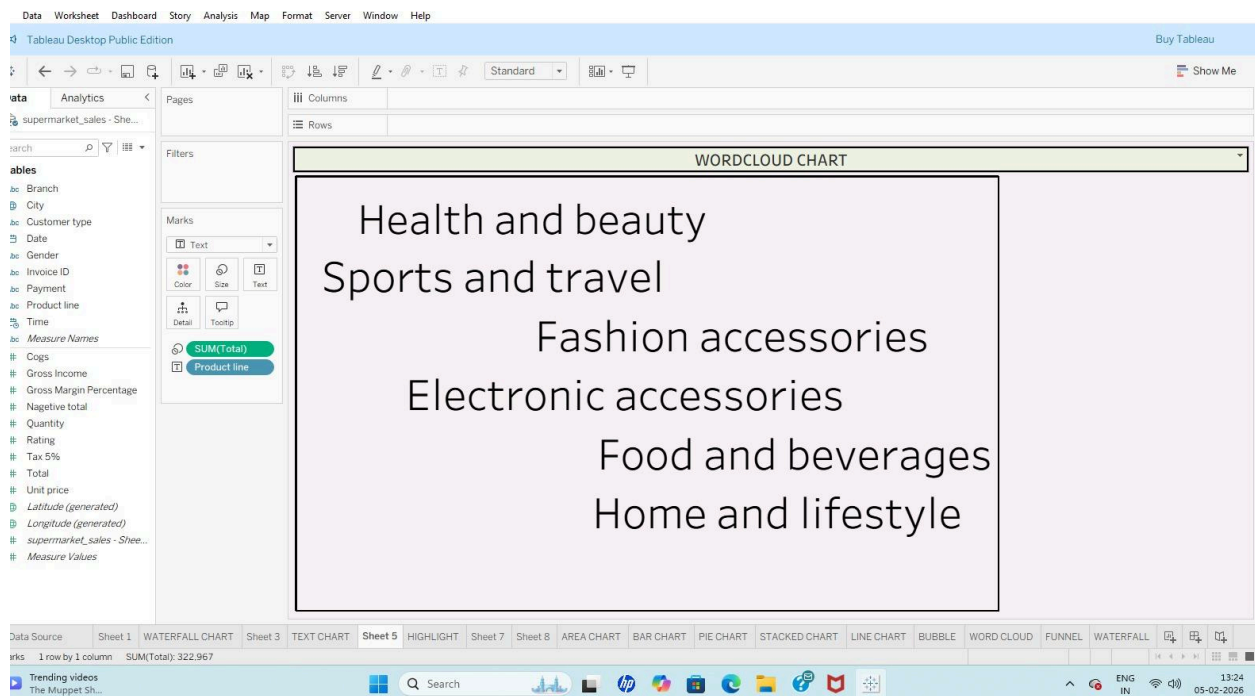● Go to Format → Borders to add row and column dividers (optional).

WORDCLOUD CHART

Purpose:

A Word Cloud shows text data visually based on word frequency.
Frequently used words appear bigger in size.It helps identify important or common words quickly.

Steps:

● Open a new worksheet in Tableau.
● Drag Product line to Text on the Marks card.
● Drag SUM(Total) to Size (higher sales → bigger text).
● In Marks dropdown, select Text.
● Click Size and adjust the slider to increase font size.
● (Optional) Drag Product line to Color for different colors.
● Go to Fit → Entire View for better alignment.
● Add title: Product Category Overview.
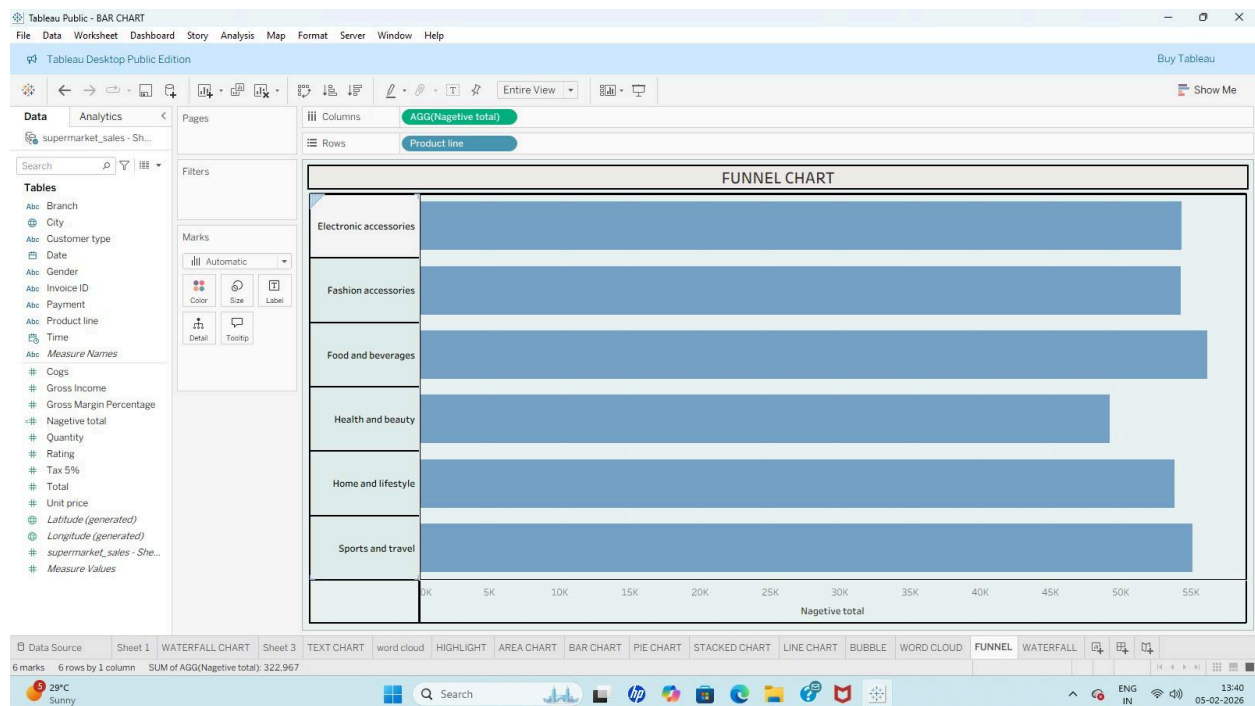● Format → Shading/Borders to add background color and border needed

FUNNAL CHART

Purpose:
A Funnel Chart is used to show stages in a process and how values decrease at each step.
It helps identify drop-offs in sales, leads, or conversion processess

Steps:
● Open a new worksheet in Tableau.
● Drag Product line to Rows.
● Drag Negative Total (calculated field) to Columns.
● In Marks dropdown, select Bar (if not automatic).
● Drag Negative Total to Label to display values on bars.
● Click Color and choose a single color (e.g., light purple).
● Click Size and adjust bar thickness.
● Sort in descending order (click Sort icon on toolbar)
● Rename title as Negative Total by Category.
● Select Fit → Entire View for proper alignment.
● Use Format → Borders/Shading to add background color and borders
if needed

WATERFALL CHART

Purpose:
A Waterfall Chart is used to show how positive and negative values affect a total value step by step.It helps understand profit, loss, or changes in financial data clearly.

Steps:
● Open a new worksheet in Tableau.
● Drag Product line to Columns.
● Drag SUM(Total) to Rows.
● Right-click on SUM(Total) in Rows → Select Quick Table
Calculation → Running Total.
● In Marks dropdown, select Gantt Bar (for step-like cumulative effect).
● Drag SUM(Total) to Size to adjust bar length.
● (Optional) Drag SUM(Total) to Label to display cumulative values.
● Sort Product line if needed (ascending order).
● Rename title as Product Line Wise Cumulative Total.
● Select Fit → Entire View for better view.
● Use Format → Shading/Borders for background styling if required.