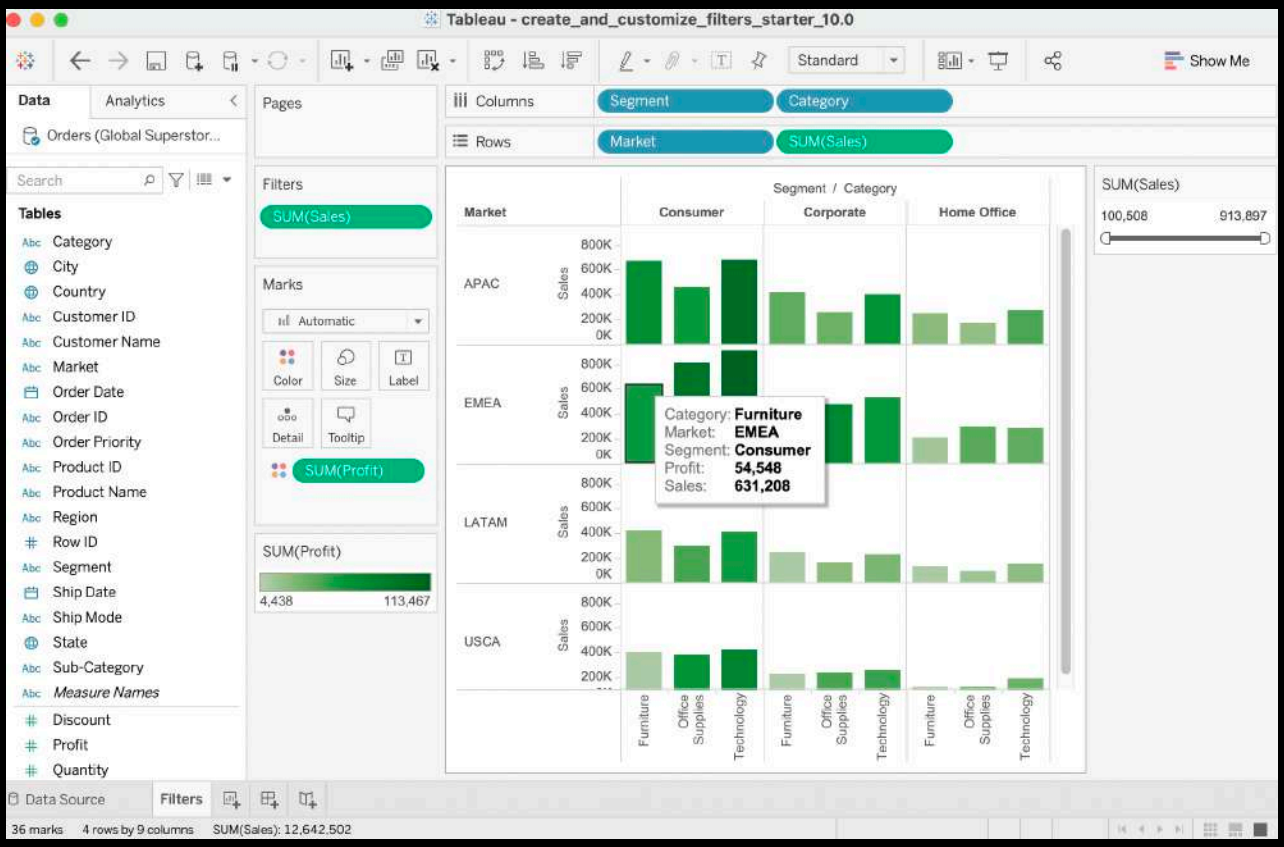
DATA VISUALIZATION ASSIGNMENT

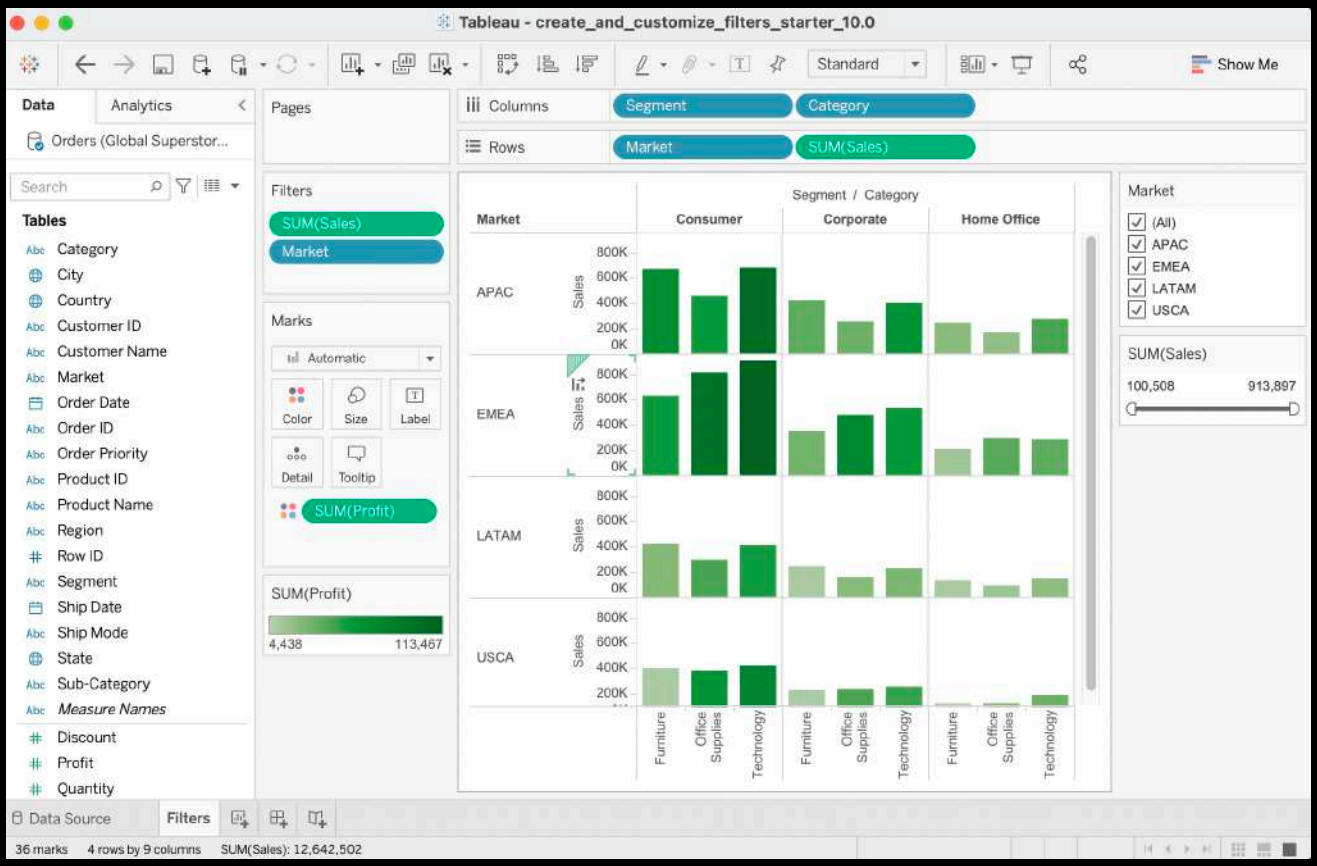
Create and Customize Filters

1. Question : Filter EMEA to between $300,000 and $800,000 in sales. Which segment/ category shows the least sales?

Answer: The Furniture Category, Corporate Segment shows the least sales of $359,351 with a profit of $29,871

Steps:

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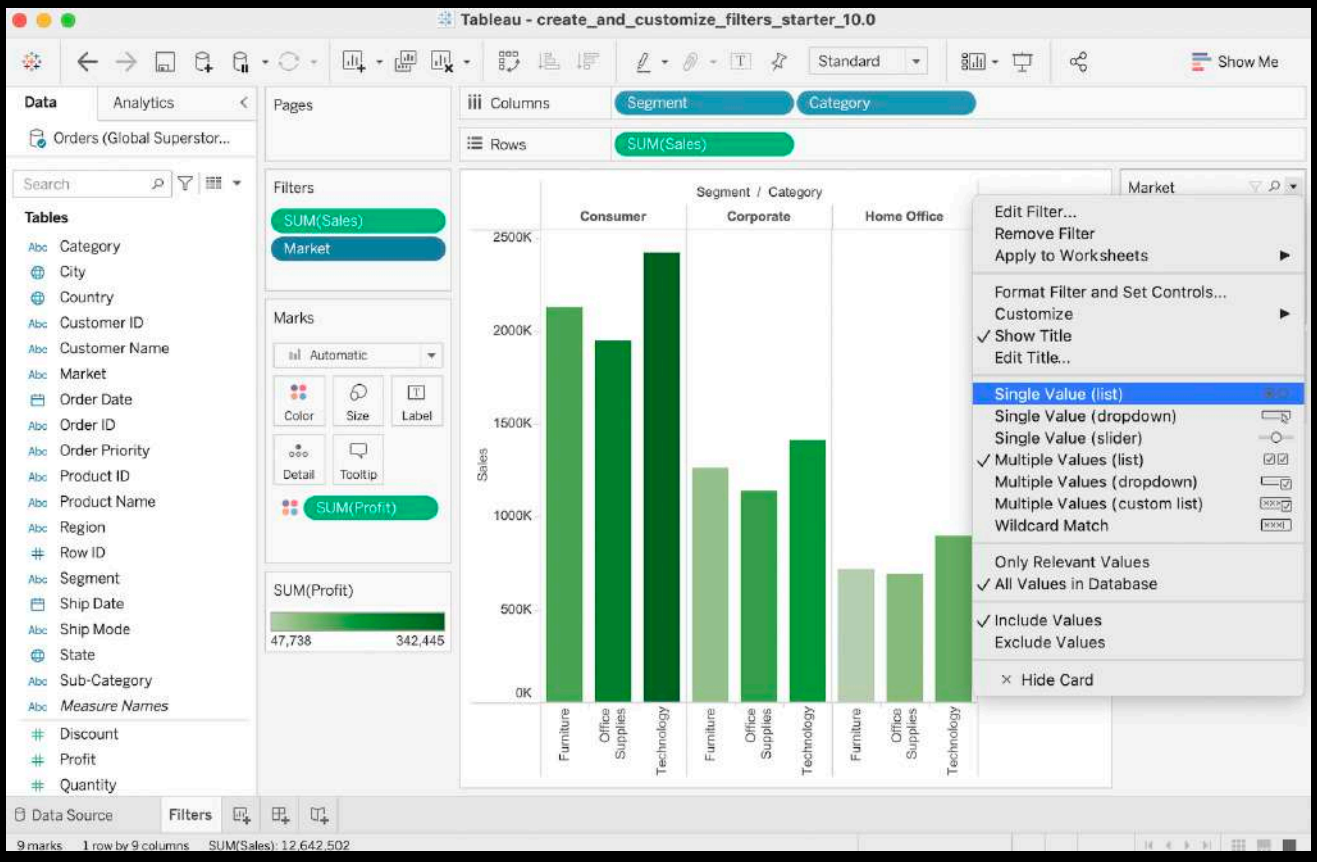
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
City
Country
Abc Customer ID
Abc Customer Name
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Filters
SUM(Sales)
Market
Marks
Automatic
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Profit)
4,438
113,467
Columns
Segment
Category
Rows
Market
SUM(Sales)
Segment / Category
Consumer
Corporate
Home Office
APAC
EMEA
LATAM
USCA
Sales
800K
600K
400K
200K
0K
Furniture
Office Supplies
Technology
Market
(All)
APAC
EMEA
LATAM
USCA
SUM(Sales)
100,508
913,897
Data Source
Filters
36 marks
4 rows by 9 columns
SUM(Sales): 12,642,502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Orders (Global Superstor...
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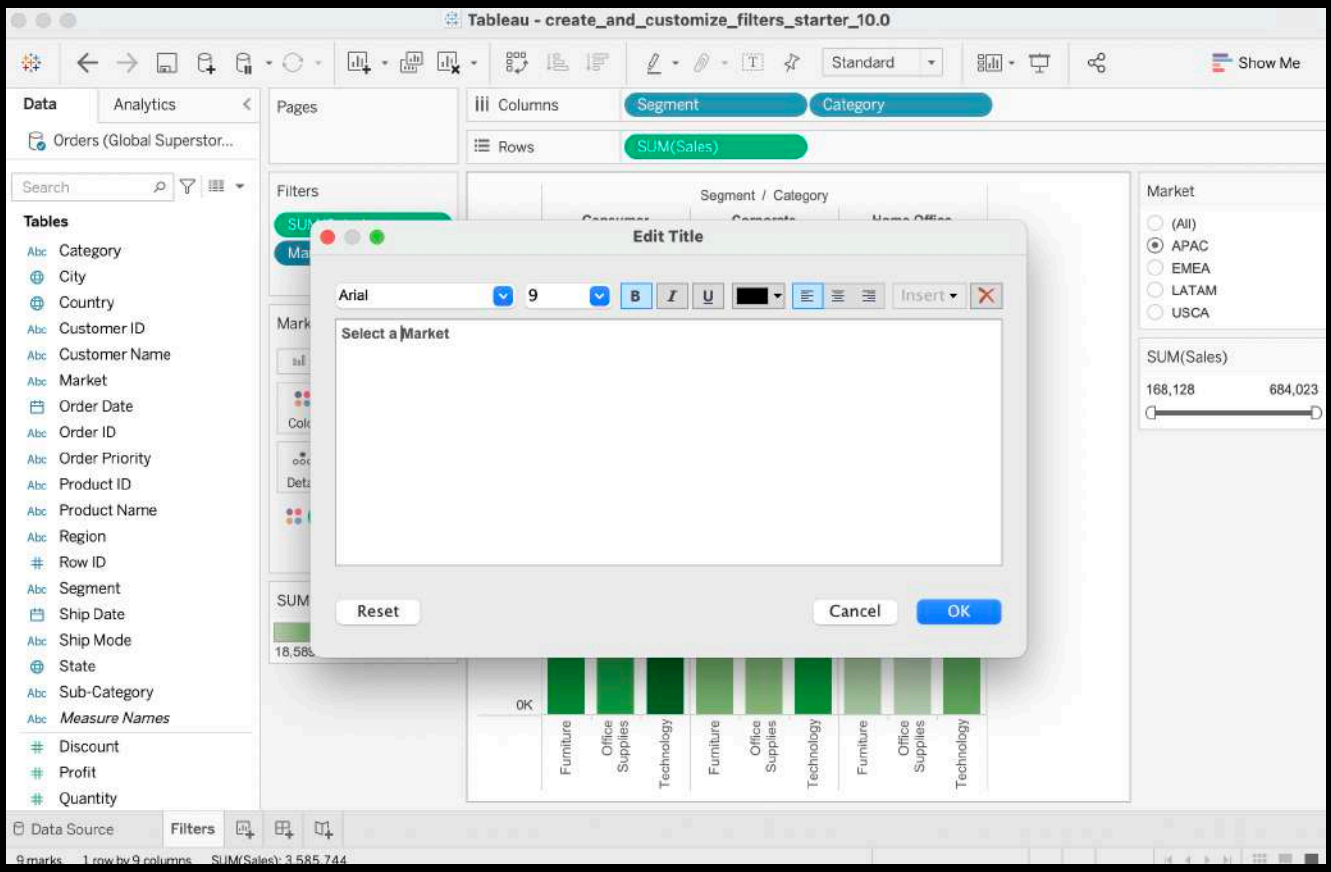
Abc Customer Name
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Filters
SUM(Sales)
Market
Marks
Automatic
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Profit)
47,738
342,445
Columns
Segment
Category
Rows
SUM(Sales)
Segment / Category
Consumer
Corporate
Home Office
2500K
2000K
1500K
1000K
500K
0K
Sales
Furniture
Office Supplies
Technology
Market
Edit Filter...
Remove Filter
Apply to Worksheets
Format Filter and Set Controls...
Customize
Show Title
Edit Title...
Single Value (list)
Single Value (dropdown)
Single Value (slider)
Multiple Values (list)
Multiple Values (dropdown)
Multiple Values (custom list)
Wildcard Match
Only Relevant Values
All Values in Database
Include Values
Exclude Values
Hide Card
Data Source
Filters
9 marks
1 row by 9 columns
SUM(Sales): 12,642,502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Edit Title
Select a Market
Reset
Cancel
OK

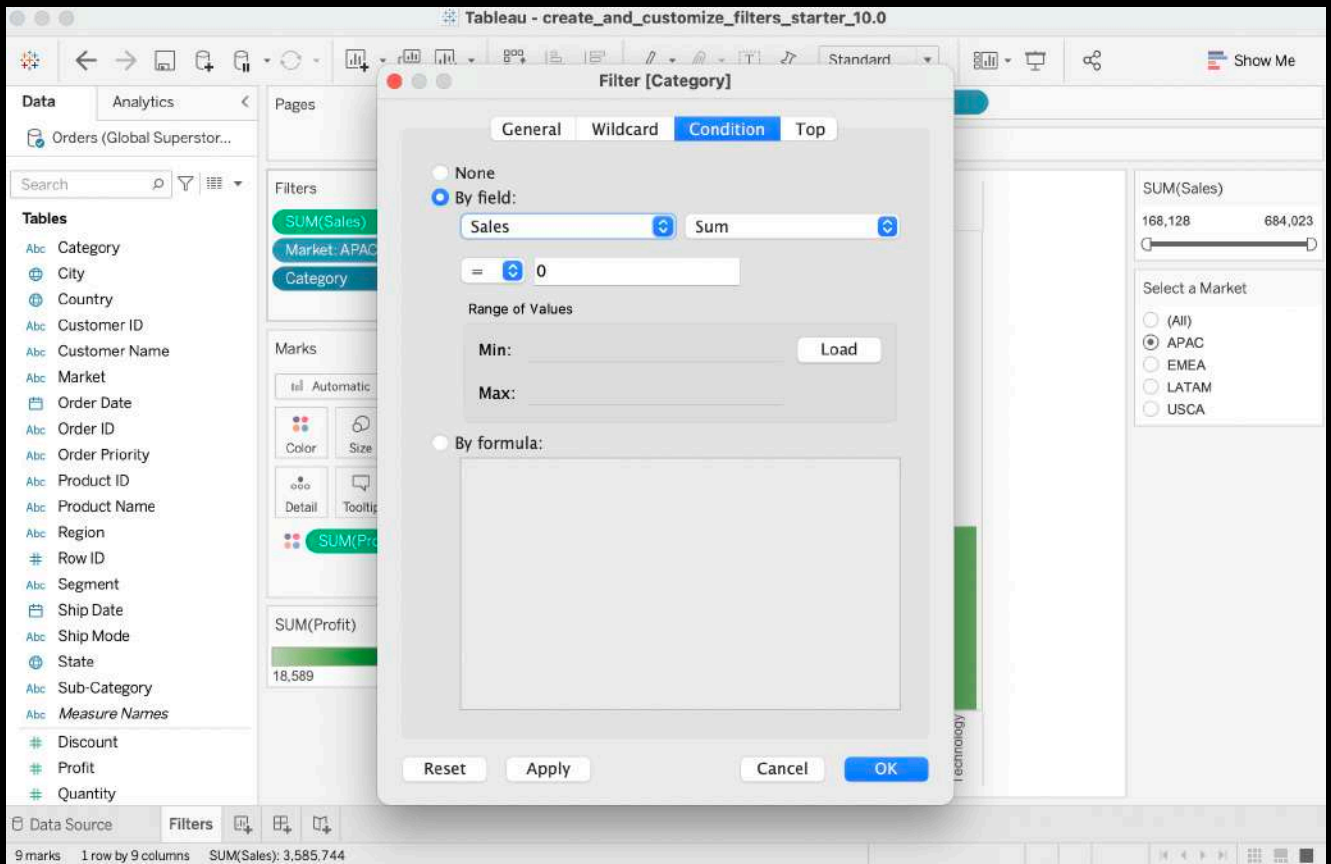
Tableau - create_and_customize_filters_starter_10.0
Filter [Category]
General
Wildcard
Condition
Top
None
By field:
Sales
Sum
Range of Values
Min:
Load
Max:
By formula:
Reset
Apply
Cancel
OK

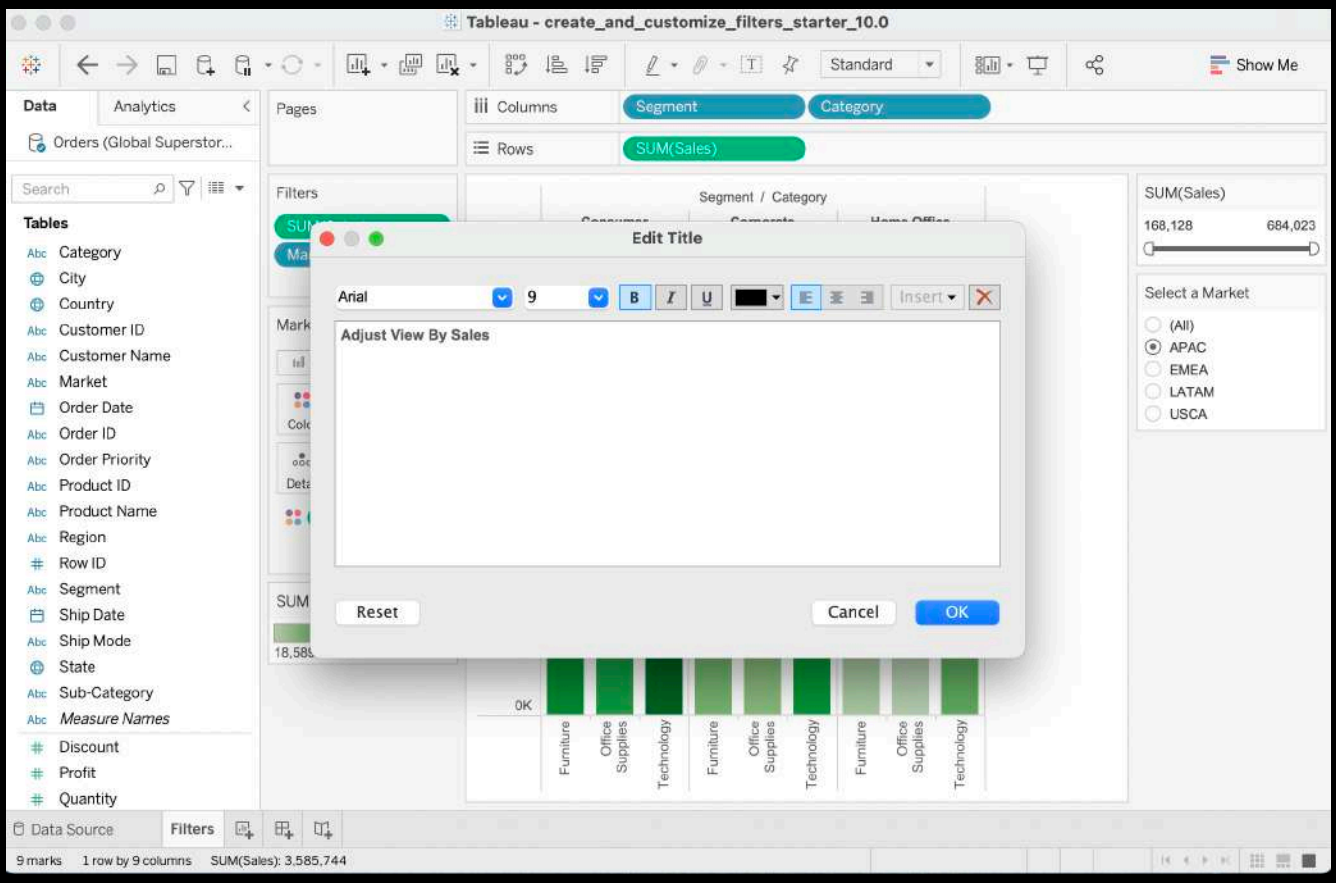
Tableau - create_and_customize_filters_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
City
Country
Abc Customer ID
Abc Customer Name
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Columns
Segment
Category
Rows
SUM(Sales)
Filters
Segment / Category
Consumer
Corporate
Home Office
SUM(Sales)
168,128
684,023
Select a Market
(All)
APAC
EMEA
LATAM
USCA
Edit Title
Arial
9
Insert
Adjust View By Sales
Reset
Cancel
OK
0K
Furniture
Office Supplies
Technology
Data Source
Filters
9 marks
1 row by 9 columns
SUM(Sales): 3,585,744

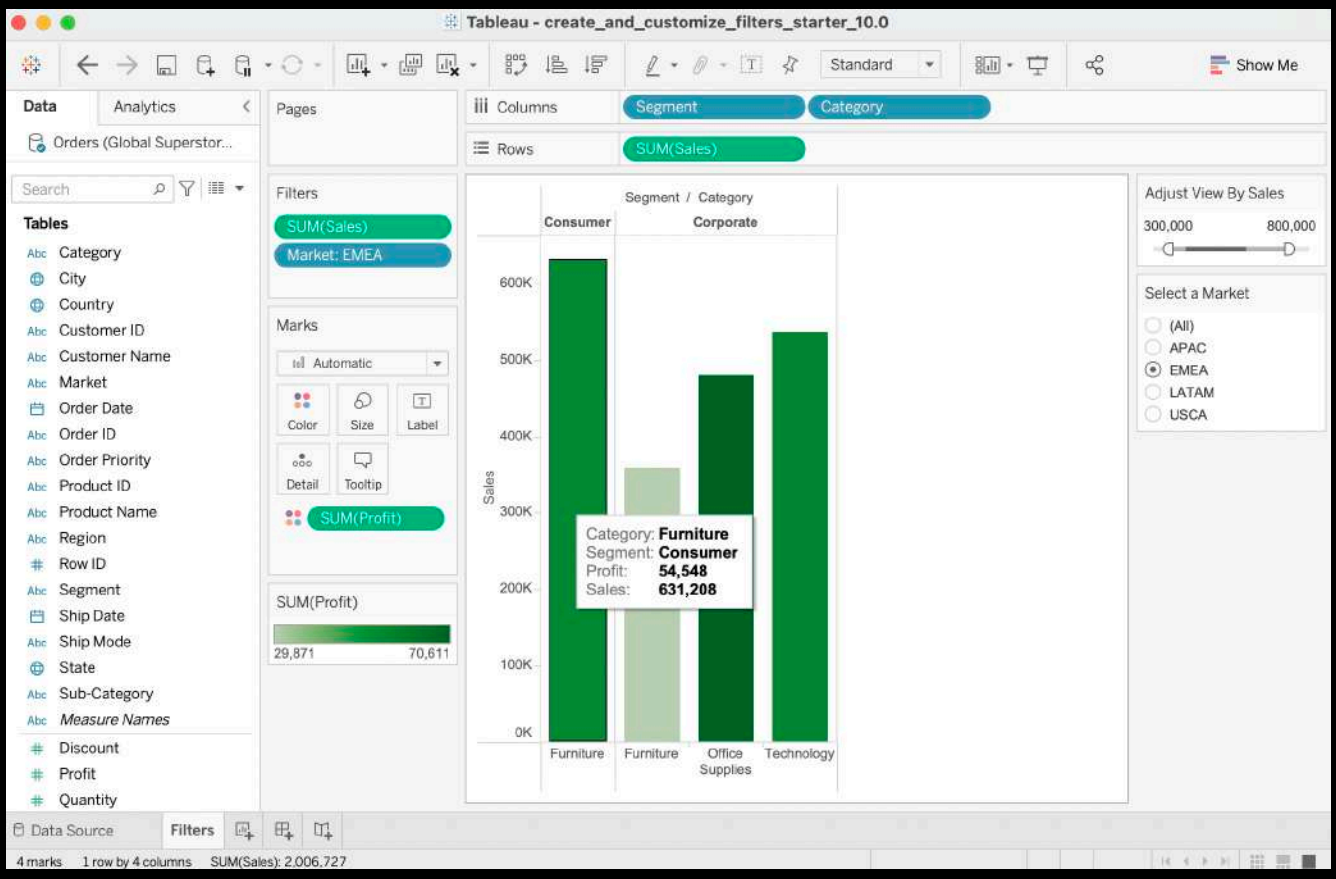
Tableau - create_and_customize_filters_starter_10.0
Standard
Show Me
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Orders (Global Superstor...
Search
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Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Columns
Segment
Category
Rows
SUM(Sales)
Filters
SUM(Sales)
Market: EMEA
Marks
Automatic
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Profit)
29,871
70,611
Segment / Category
Consumer
Corporate
600K
500K
400K
300K
200K
100K
0K
Sales
Category: Furniture
Segment: Consumer
Profit: 54,548
Sales: 631,208
Furniture
Furniture
Office Supplies
Technology
Adjust View By Sales
300,000
800,000
Select a Market
(All)
APAC
EMEA
LATAM
USCA
Data Source
Filters
4 marks
1 row by 4 columns
SUM(Sales): 2,006,727

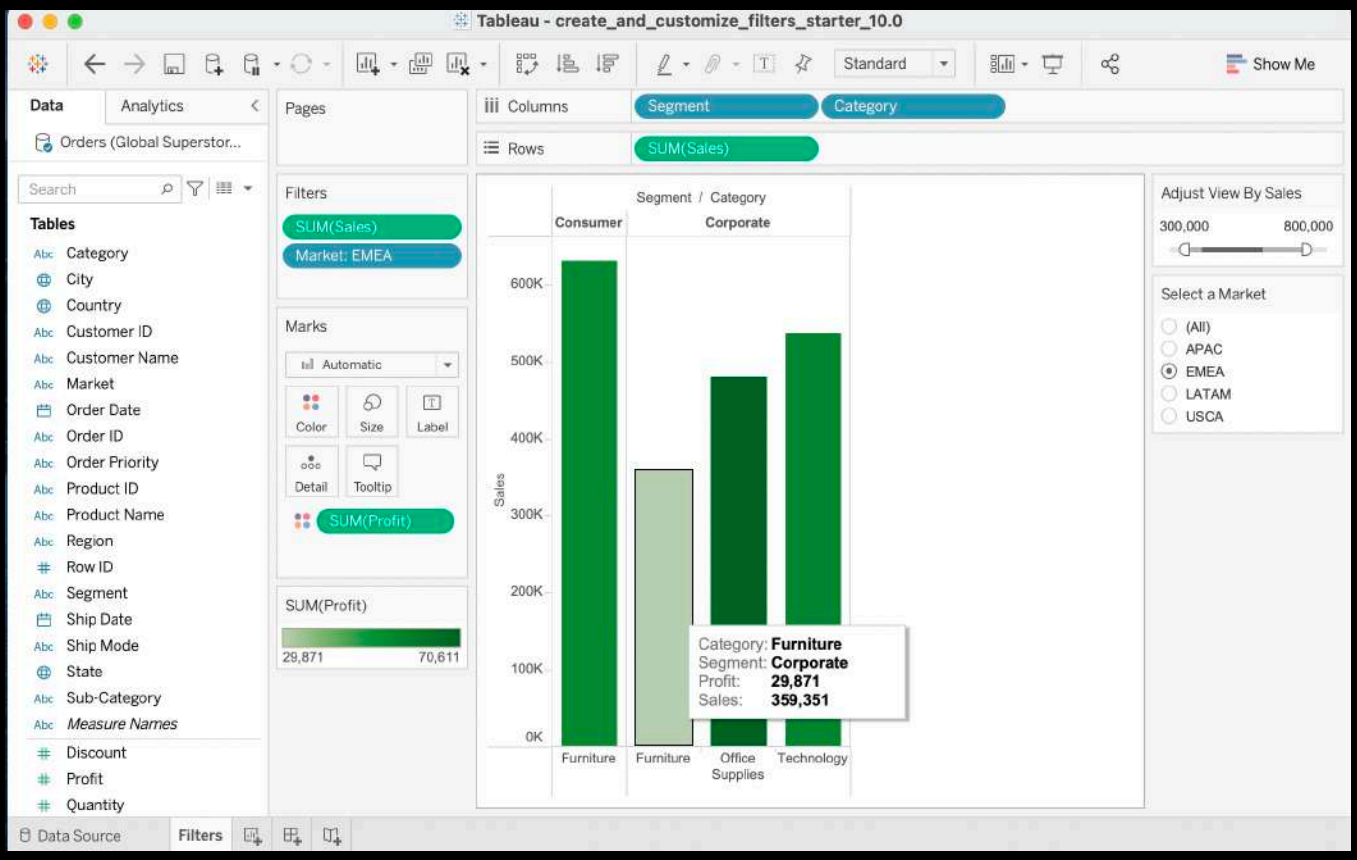
Tableau - create_and_customize_filters_starter_10.0
Standard
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Orders (Global Superstor...
Search
Tables
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Abc Customer ID
Abc Customer Name
Abc Market
Order Date
Abc Order ID
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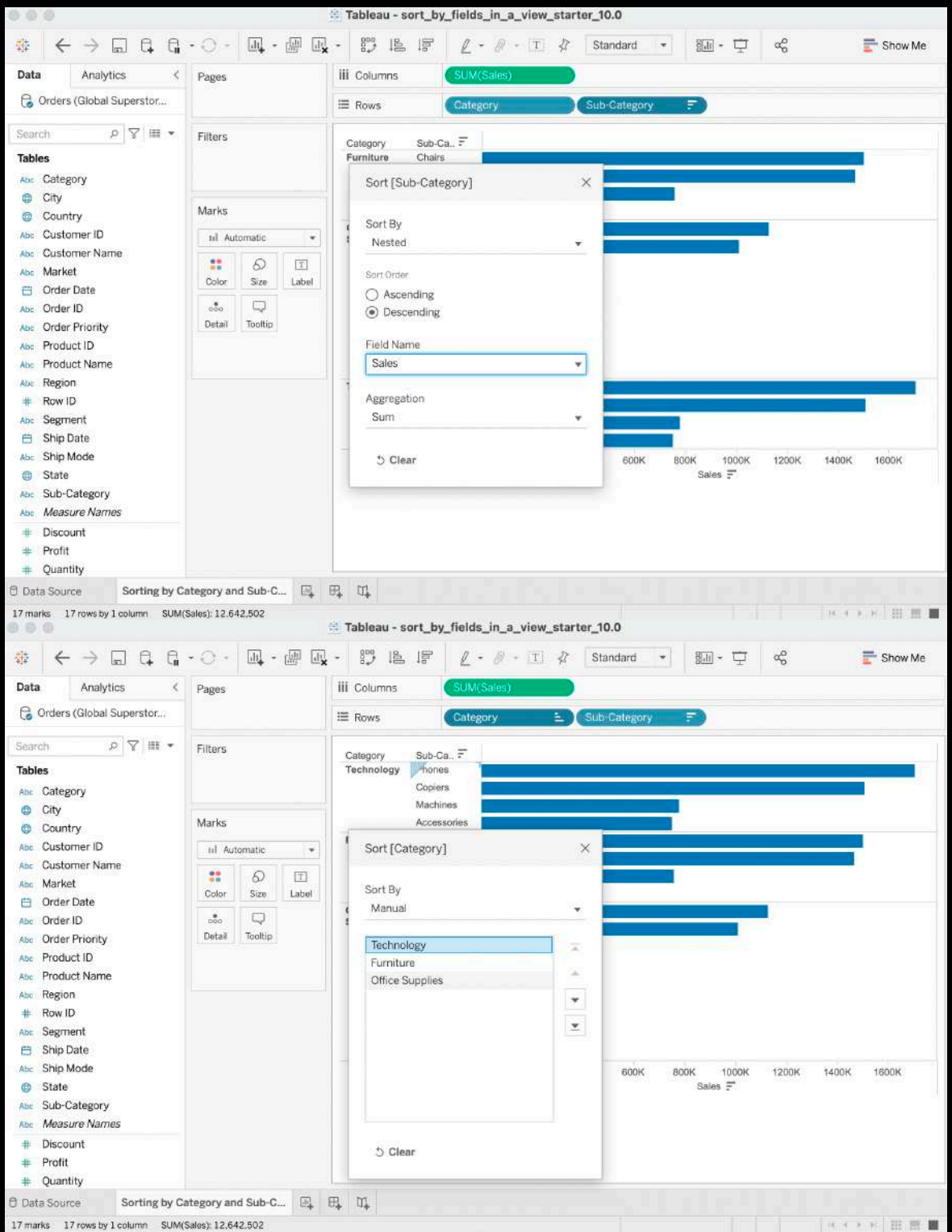
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Columns
Segment
Category
Rows
SUM(Sales)
Filters
SUM(Sales)
Market: EMEA
Marks
Automatic
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Profit)
29,871
70,611
Segment / Category
Consumer
Corporate
600K
500K
400K
300K
200K
100K
0K
Sales
Furniture
Furniture
Office Supplies
Technology
Category: Furniture
Segment: Corporate
Profit: 29,871
Sales: 359,351
Adjust View By Sales
300,000
800,000
Select a Market
(All)
APAC
EMEA
LATAM
USCA
Data Source
Filters

Sort by Fields in a View

2. Question : In Office Supplies, which Sub-Category has slightly higher sales than Supplies?

Answer:

Steps: The paper sub-category(244,292) has a slightly higher sales than supplies(243,074) in Office Supplies category.



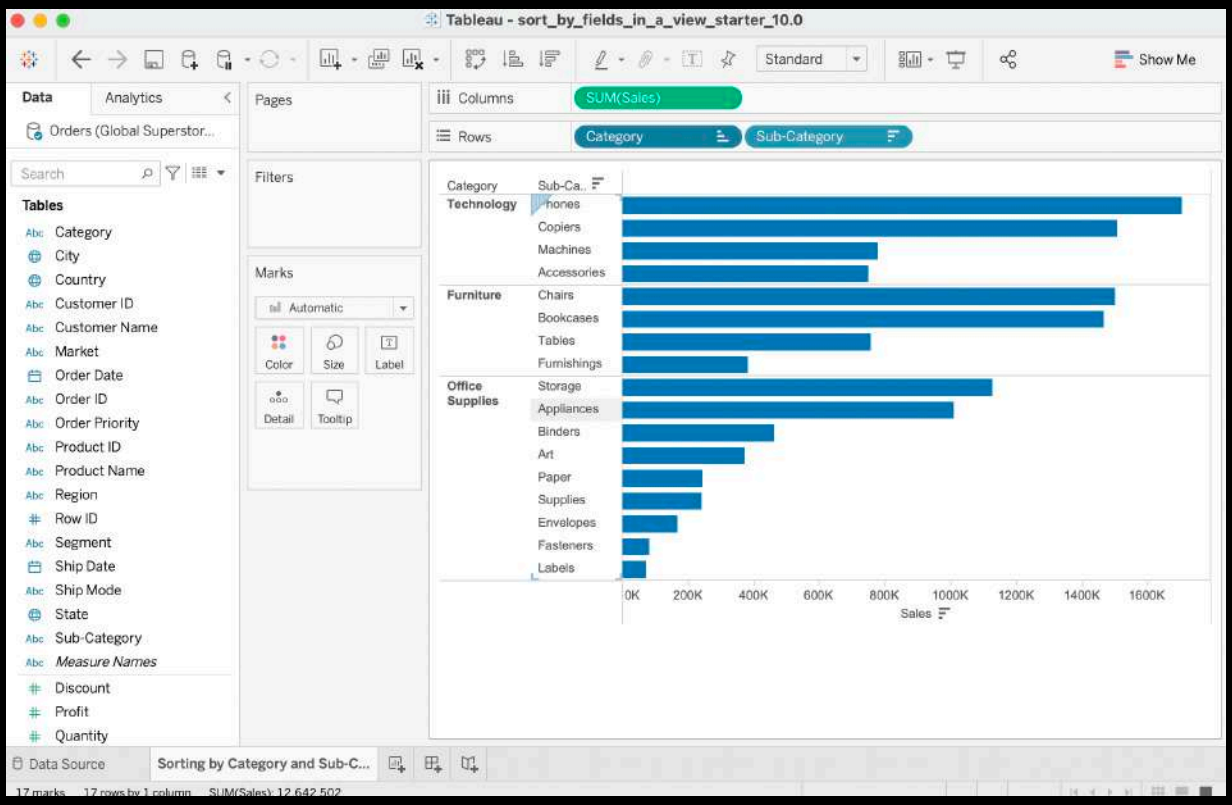


Tableau - sort_by_fields_in_a_view_starter_10.0
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Order Date
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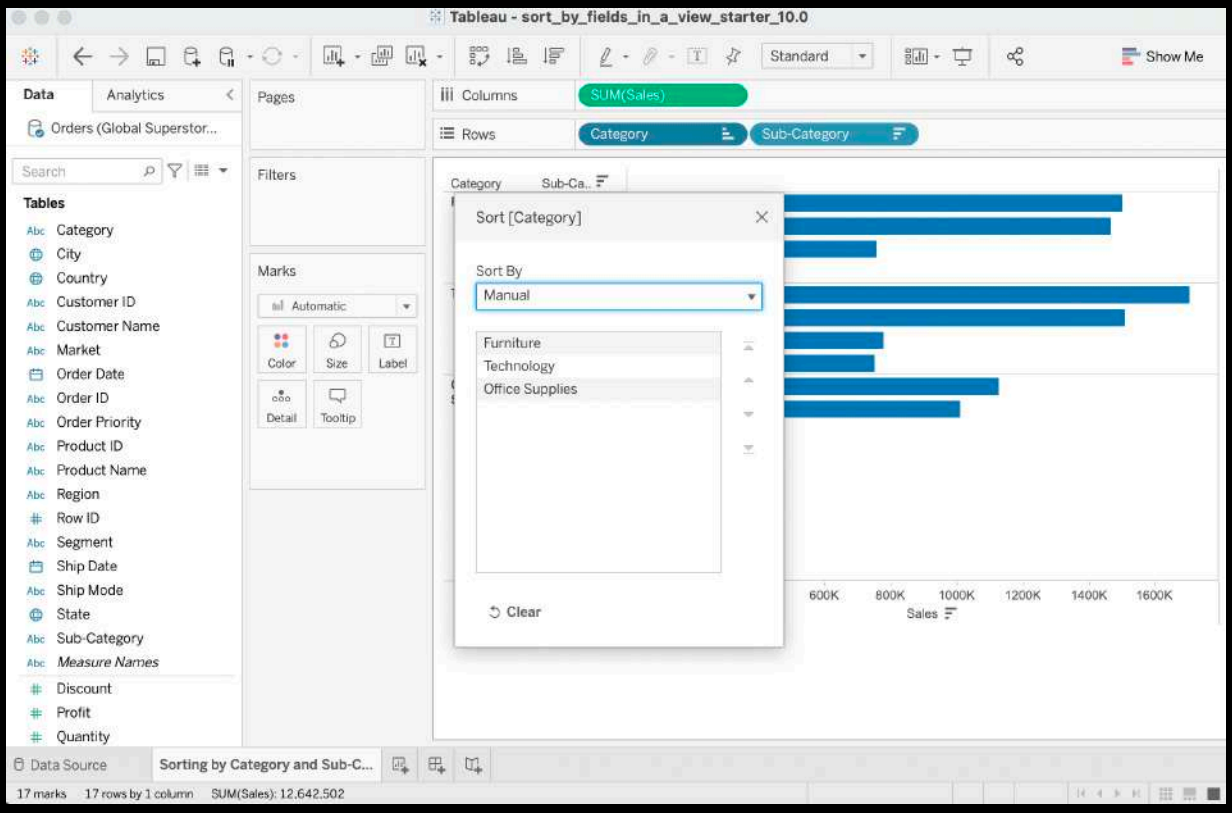
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Columns
SUM(Sales)
Rows
Category
Sub-Category
Category
Sub-Ca..
Technology
Phones
Copiers
Machines
Accessories
Furniture
Chairs
Bookcases
Tables
Furnishings
Office Supplies
Storage
Appliances
Binders
Art
Paper
Supplies
Envelopes
Fasteners
Labels
0K
200K
400K
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Sorting by Category and Sub-C...
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502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Abc Measure Names
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Profit
Quantity
Pages
Filters
Marks
Automatic
Color
Size
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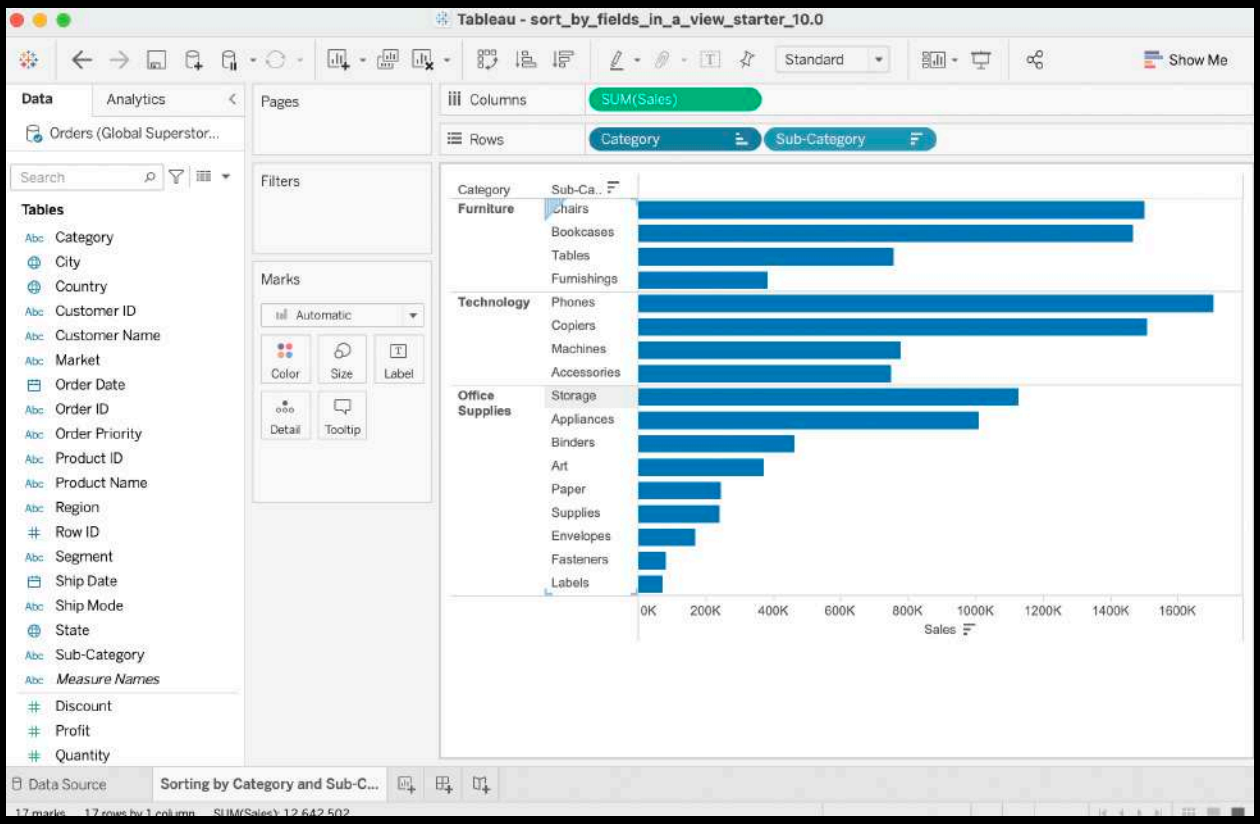
Detail
Tooltip
Columns
SUM(Sales)
Rows
Category
Sub-Category
Category
Sub-Ca..
Sort [Category]
Sort By
Manual
Furniture
Technology
Office Supplies
Clear
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Sorting by Category and Sub-C...
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502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Standard
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Orders (Global Superstor...
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Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Columns
SUM(Sales)
Rows
Category
Sub-Category
Furniture
Chairs
Bookcases
Tables
Furnishings
Technology
Phones
Copiers
Machines
Accessories
Office Supplies
Storage
Appliances
Binders
Art
Paper
Supplies
Envelopes
Fasteners
Labels
0K
200K
400K
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Sorting by Category and Sub-C...

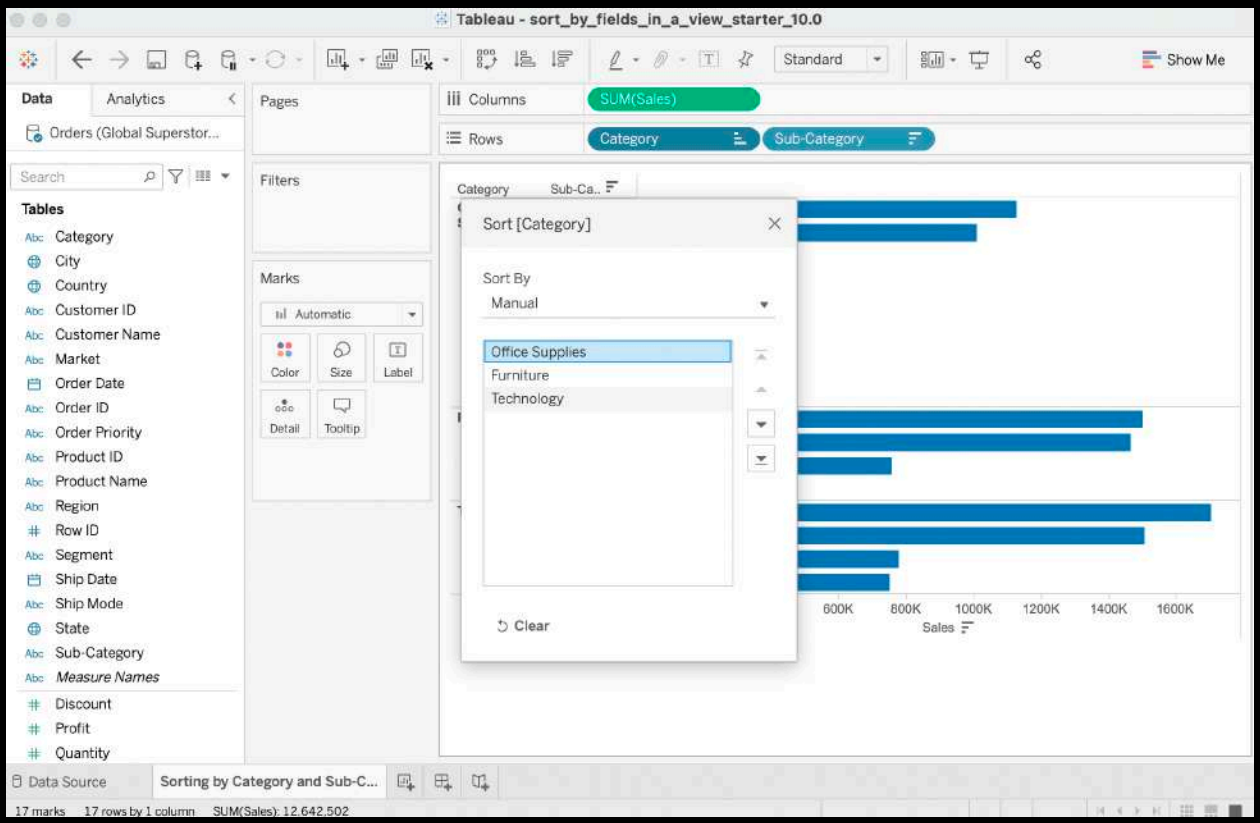
Tableau - sort_by_fields_in_a_view_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Category
City
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Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Columns
SUM(Sales)
Rows
Category
Sub-Category
Sort [Category]
Sort By
Manual
Office Supplies
Furniture
Technology
Clear
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Sorting by Category and Sub-C...
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502

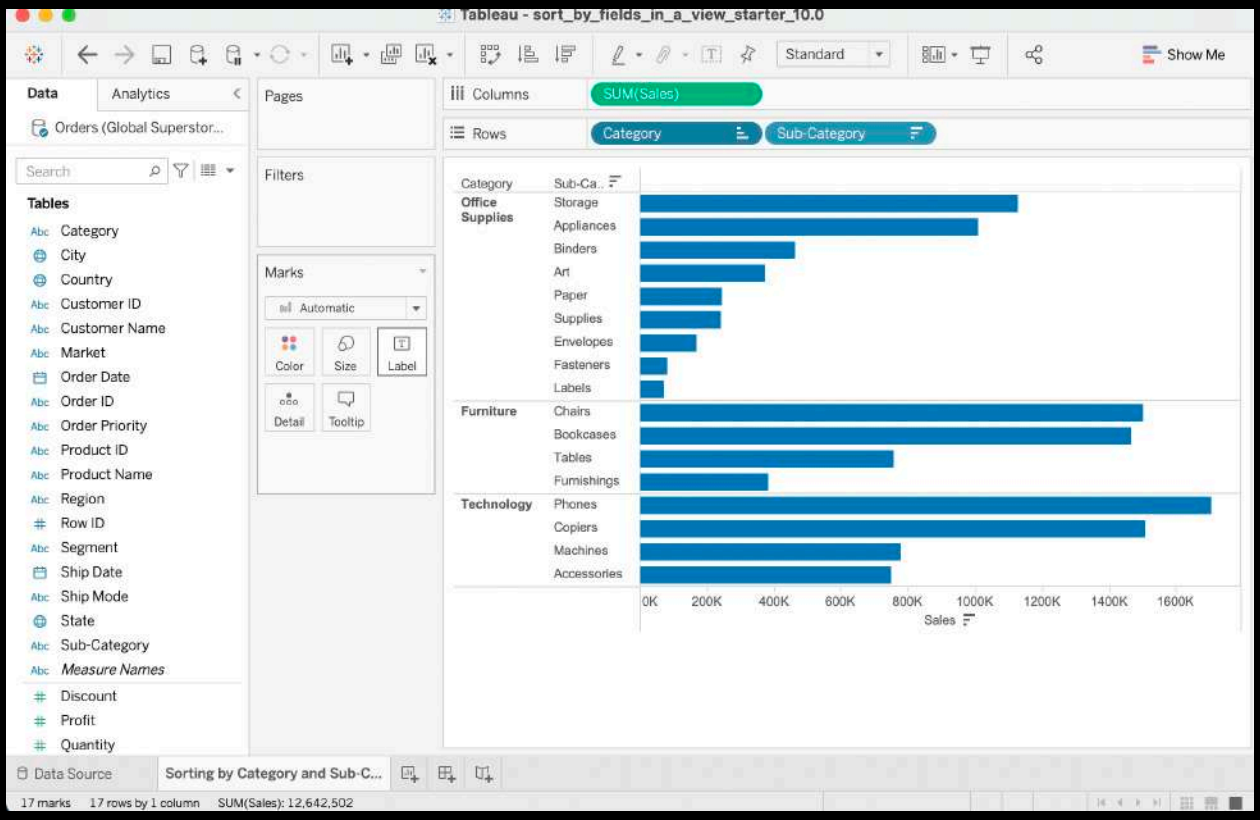
Tableau - sort_by_fields_in_a_view_starter_10.0
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Orders (Global Superstor...
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Order Date
Abc Order ID
Abc Order Priority
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Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
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Pages
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Marks
Automatic
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Size
Label
Detail
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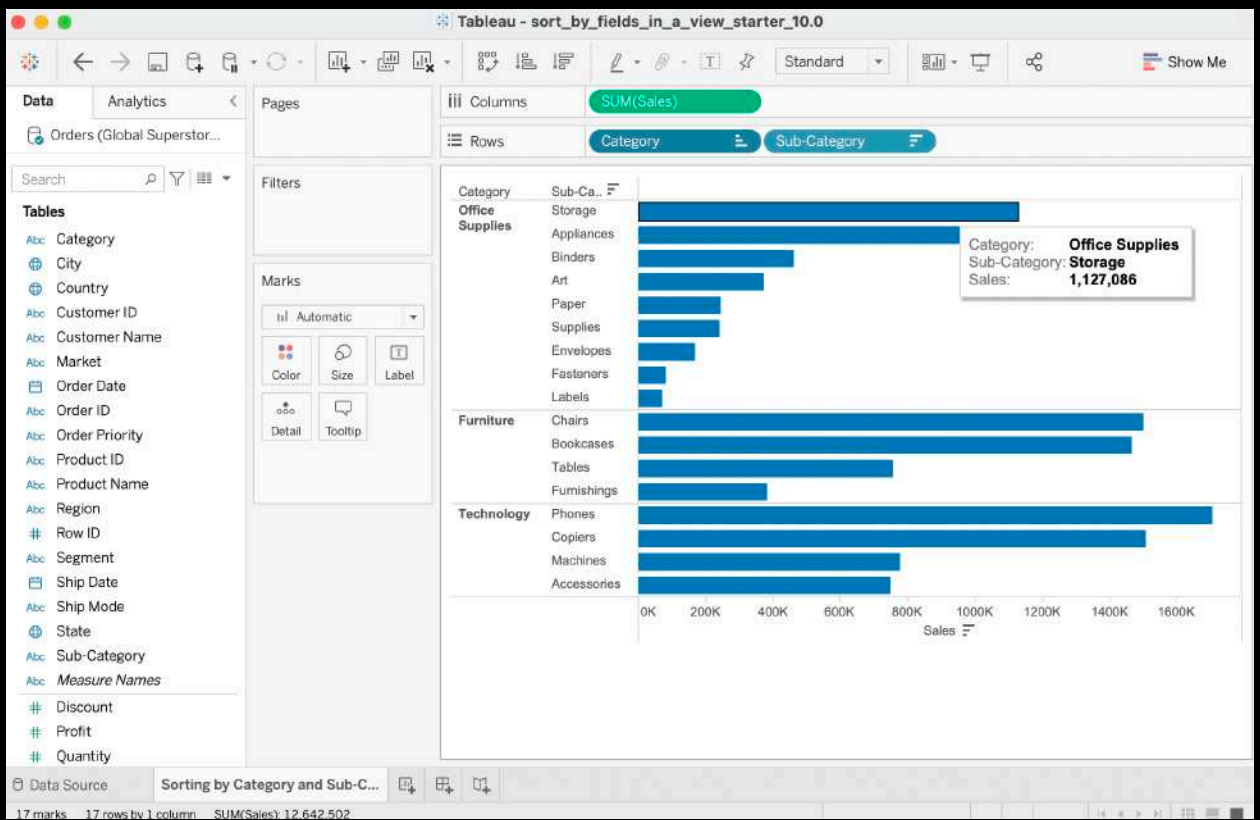
Category
Sub-Category
Category
Sub-Ca..
Office Supplies
Storage
Appliances
Binders
Art
Paper
Supplies
Envelopes
Fasteners
Labels
Furniture
Chairs
Bookcases
Tables
Furnishings
Technology
Phones
Copiers
Machines
Accessories
0K
200K
400K
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Sorting by Category and Sub-C...
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502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Analytics
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Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Columns
SUM(Sales)
Rows
Category
Sub-Category
Category
Sub-Ca..
Office Supplies
Storage
Appliances
Binders
Art
Paper
Supplies
Envelopes
Fasteners
Labels
Furniture
Chairs
Bookcases
Tables
Furnishings
Technology
Phones
Copiers
Machines
Accessories
Category: Office Supplies
Sub-Category: Storage
Sales: 1,127,086
0K
200K
400K
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Sorting by Category and Sub-C...
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502

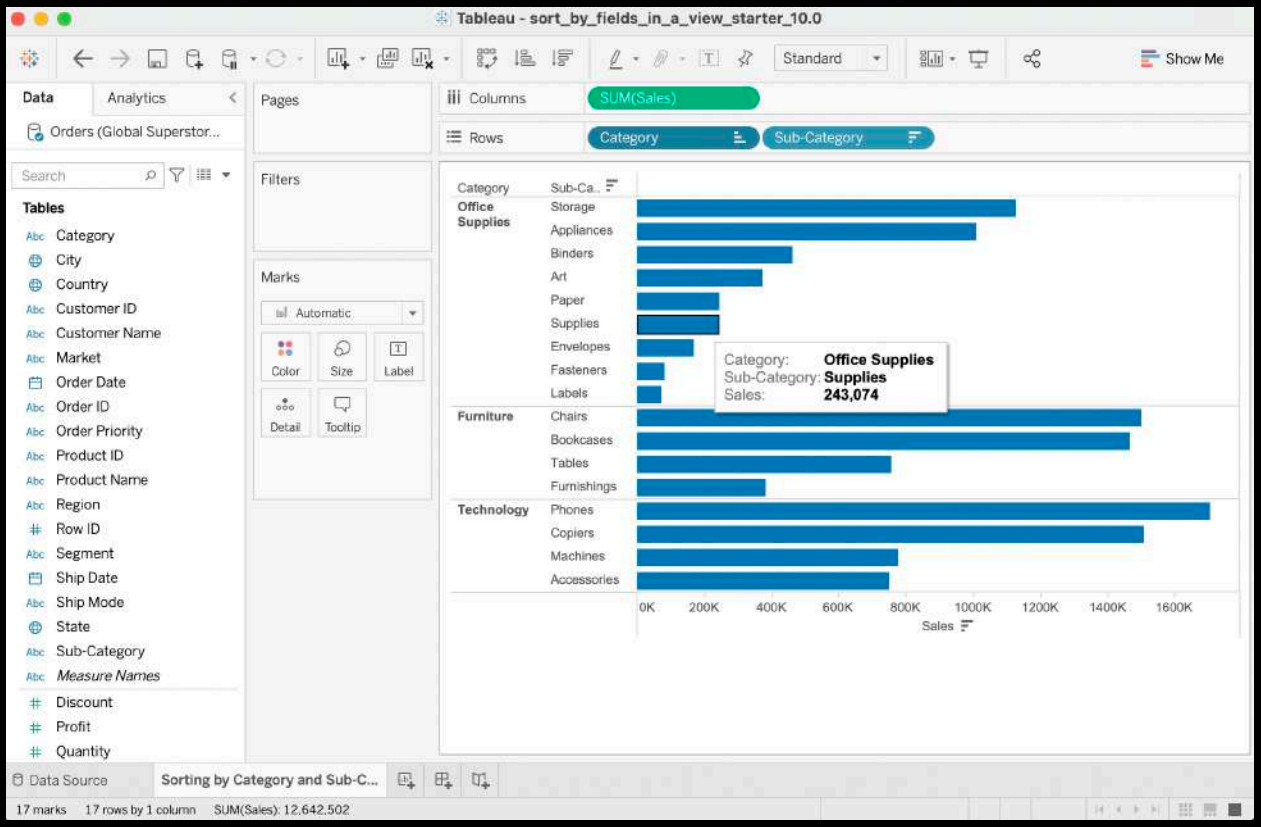
Tableau - sort_by_fields_in_a_view_starter_10.0
Standard
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Abc Segment
Ship Date
Abc Ship Mode
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Abc Sub-Category
Abc Measure Names
Discount
Profit
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Color
Size
Label
Detail
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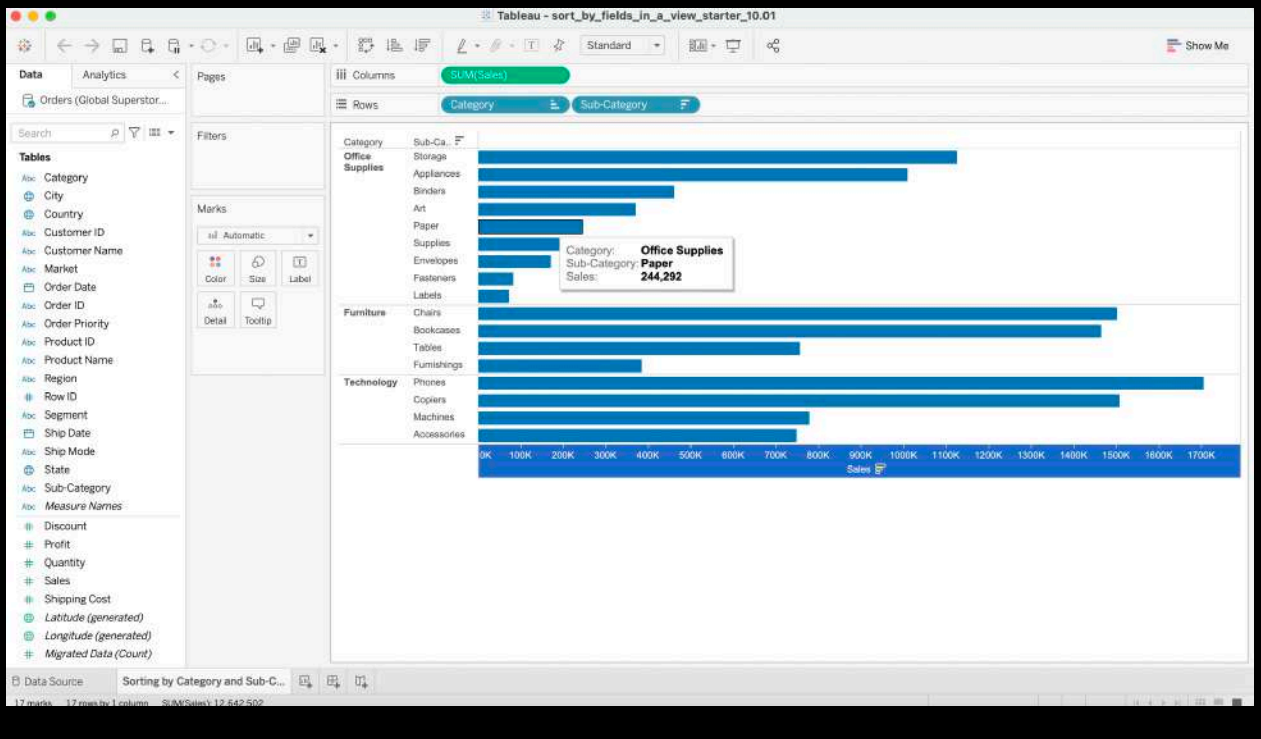
Columns
SUM(Sales)
Rows
Category
Sub-Category
Category
Sub-Ca..
Office Supplies
Storage
Appliances
Binders
Art
Paper
Supplies
Envelopes
Fasteners
Labels
Furniture
Chairs
Bookcases
Tables
Furnishings
Technology
Phones
Copiers
Machines
Accessories
Category: Office Supplies
Sub-Category: Supplies
Sales: 243,074
0K 200K 400K 600K 800K 1000K 1200K 1400K 1600K
Sales
Data Source
Sorting by Category and Sub-C...
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502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Orders (Global Superstor...
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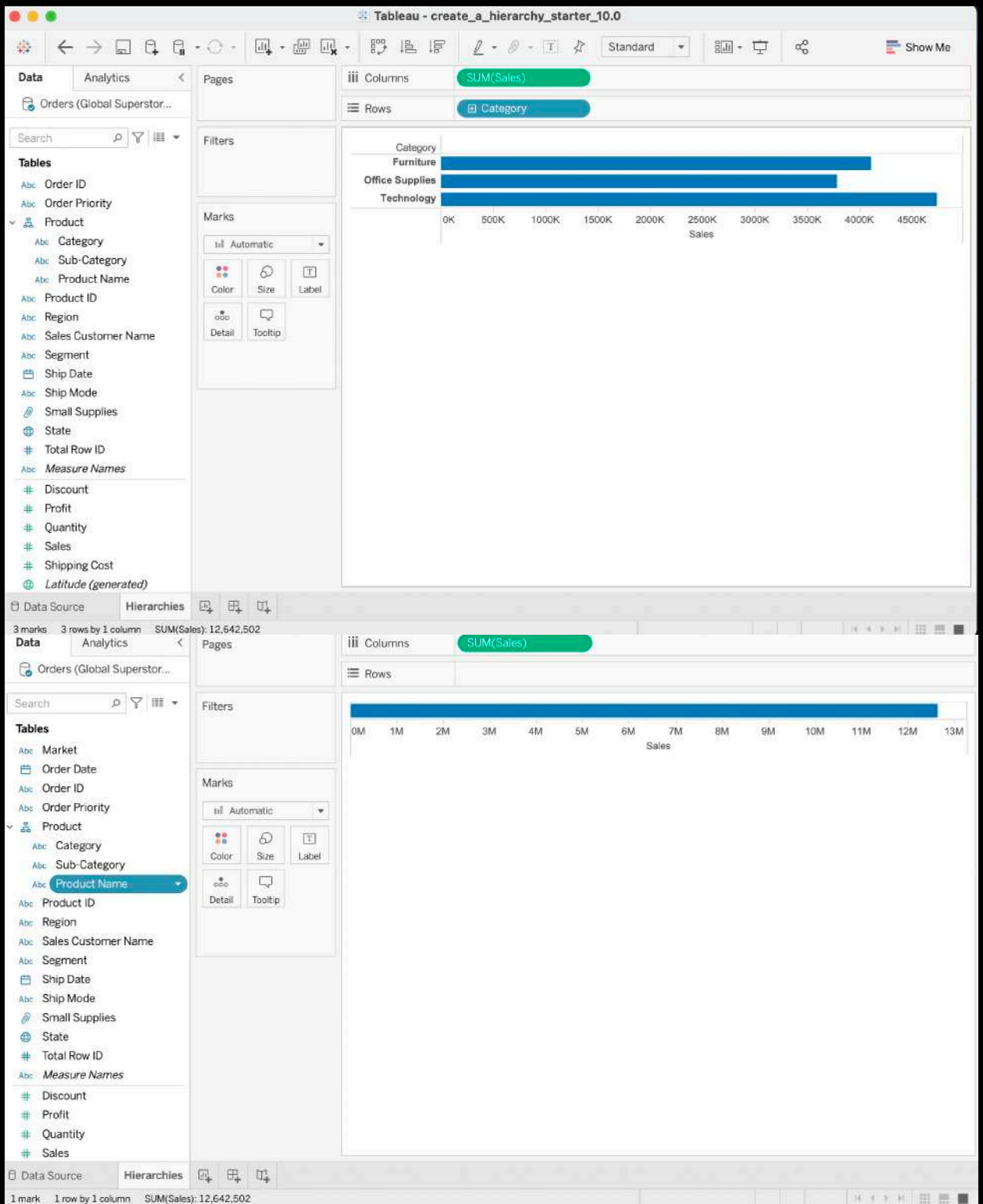
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Longitude (generated)
Migrated Data (Count)
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Columns
SUM(Sales)
Rows
Category
Sub-Category
Category
Sub-Ca..
Office Supplies
Storage
Appliances
Binders
Art
Paper
Supplies
Envelopes
Fasteners
Labels
Furniture
Chairs
Bookcases
Tables
Furnishings
Technology
Phones
Copiers
Machines
Accessories
Category: Office Supplies
Sub-Category: Paper
Sales: 244,292
0K 100K 200K 300K 400K 500K 600K 700K 800K 900K 1000K 1100K 1200K 1300K 1400K 1500K 1600K 1700K
Sales
Data Source
Sorting by Category and Sub-C...

Create a Hierarchy

3. Question : The “Square Credit Card Reader” is listed under which Sub-Category?

Answer: The “ Square Credit Card Reader ” is listed under category Technology and dub category phones.

Steps:



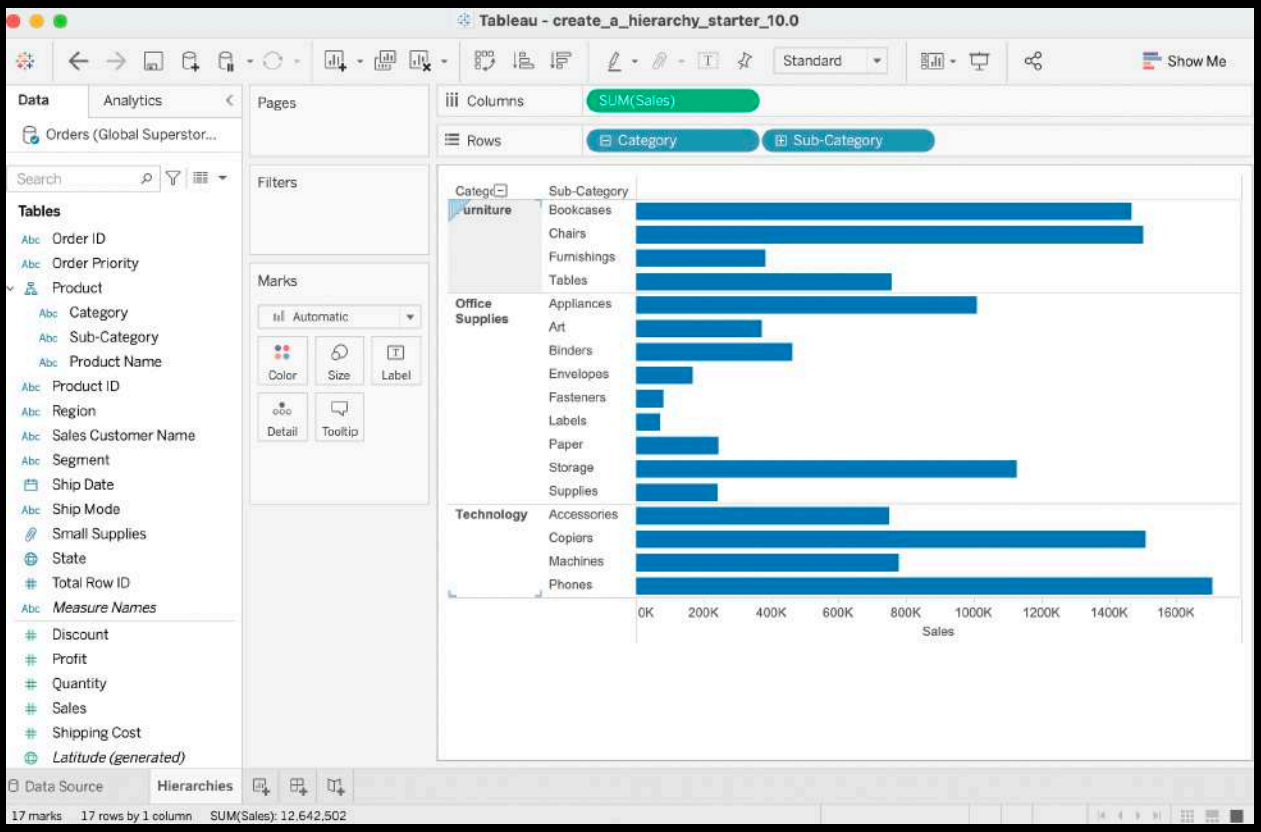


Tableau - create_a_hierarchy_starter_10.0
Standard
Show Me
Data
Analytics
Pages
Columns
SUM(Sales)
Rows
Category
Sub-Category
Orders (Global Superstor...
Search
Filters
Tables
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Order ID
Order Priority
Product
Category
Sub-Category
Product Name
Product ID
Region
Sales Customer Name
Segment
Ship Date
Ship Mode
Small Supplies
State
Total Row ID
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Furniture
Bookcases
Chairs
Furnishings
Tables
Office Supplies
Appliances
Art
Binders
Envelopes
Fasteners
Labels
Paper
Storage
Supplies
Technology
Accessories
Copiers
Machines
Phones
0K
200K
400K
600K
800K
1000K
1200K
1400K
1600K
Sales
Data Source
Hierarchies
17 marks
17 rows by 1 column
SUM(Sales): 12,642,502

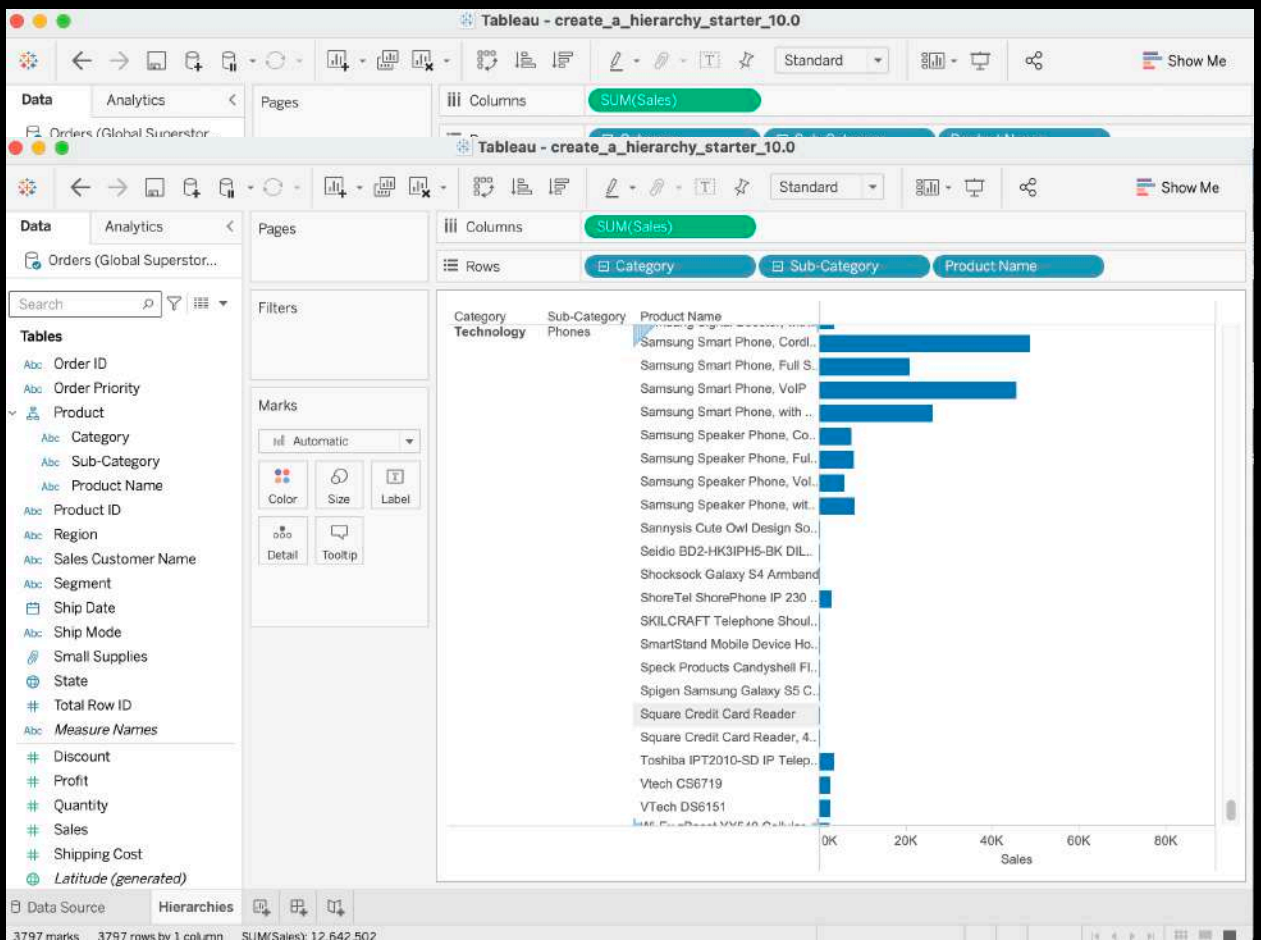


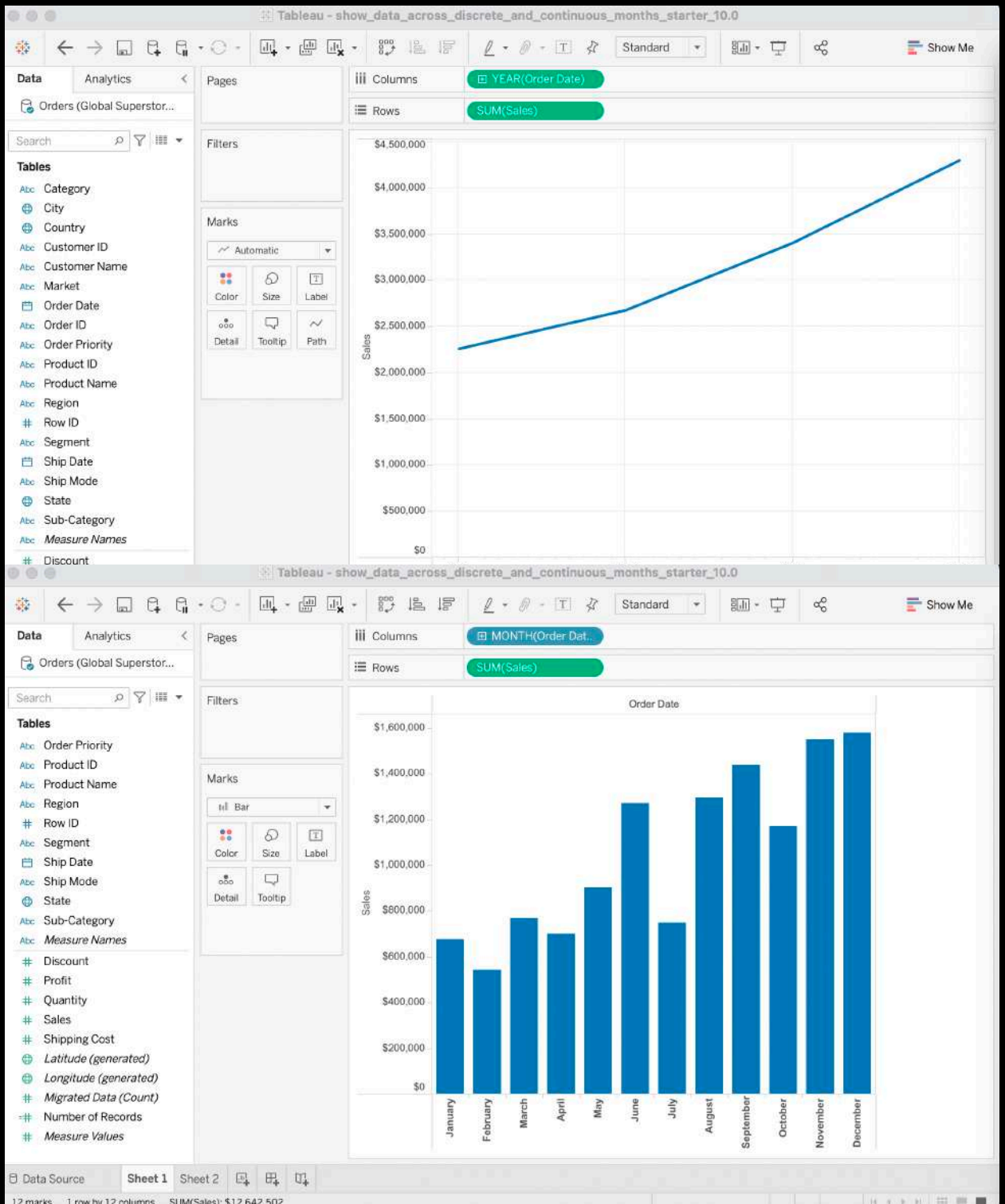
Tableau - create_a_hierarchy_starter_10.0
Standard
Show Me
Data
Analytics
Pages
Columns
SUM(Sales)
Rows
Category
Sub-Category
Product Name
Orders (Global Superstor...
Search
Filters
Tables
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Order ID
Order Priority
Product
Category
Sub-Category
Product Name
Product ID
Region
Sales Customer Name
Segment
Ship Date
Ship Mode
Small Supplies
State
Total Row ID
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Technology
Phones
Samsung Smart Phone, Cordl...
Samsung Smart Phone, Full S...
Samsung Smart Phone, VoIP
Samsung Smart Phone, with ...
Samsung Speaker Phone, Co...
Samsung Speaker Phone, Ful...
Samsung Speaker Phone, Vol...
Samsung Speaker Phone, wit...
Sannysis Cute Owl Design So...
Seidio BD2-HK3IPH5-BK DIL...
Shocksock Galaxy S4 Armband
ShoreTel ShorePhone IP 230 ...
SKILCRAFT Telephone Shoul...
SmartStand Mobile Device Ho...
Speck Products Candyshell Fl...
Spigen Samsung Galaxy S5 C...
Square Credit Card Reader
Square Credit Card Reader, 4...
Toshiba IPT2010-SD IP Telep...
Vtech CS6719
VTech DS6151
0K
20K
40K
60K
80K
Sales
Data Source
Hierarchies
3797 marks
3797 rows by 1 column
SUM(Sales): 12,642,502

Show Data Across Discrete and Continuous Months

4. Question: What were the total sales for all years in the month of June?

Answer: The total sales in the month of June through all the years that is June 2011 sales are $214,207, June 2012 sales are $256,176, June 2013 sales are $396,520 and June 2014 sales are $401,814. Thus the total sales are $1,268,717.

Steps:



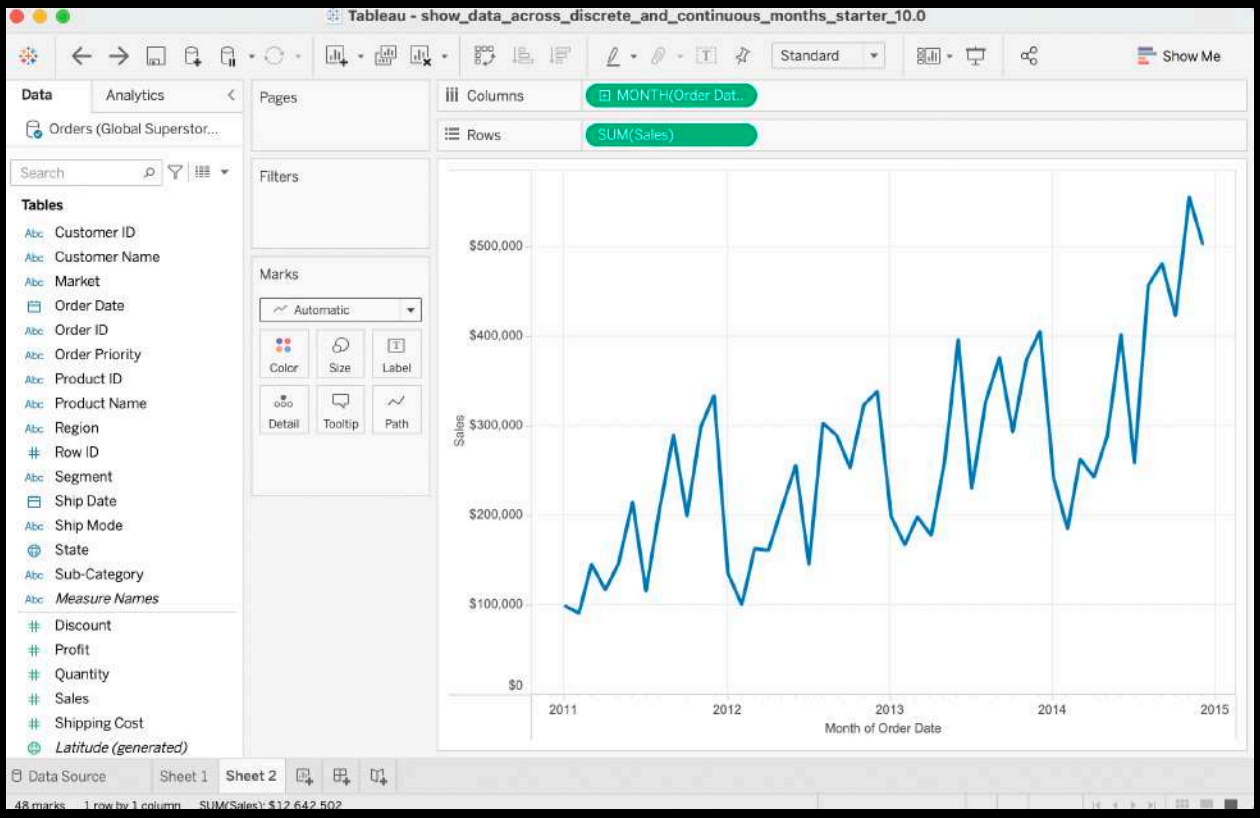


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Path
Columns
MONTH(Order Dat..
Rows
SUM(Sales)
$500,000
$400,000
$300,000
$200,000
$100,000
$0
Sales
2011
2012
2013
2014
2015
Month of Order Date
Data Source
Sheet 1
Sheet 2
48 marks
1 row by 1 column
SUM(Sales): $12,642,502

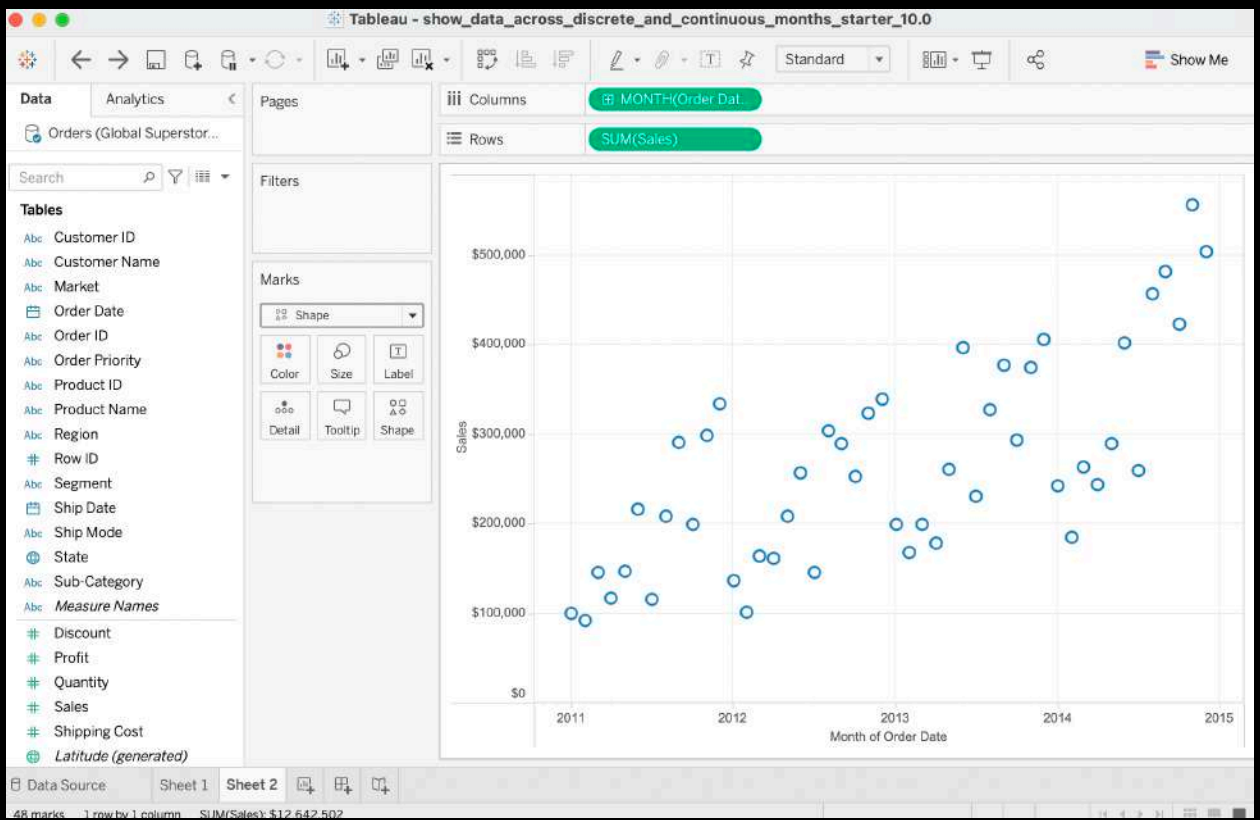


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
Columns
MONTH(Order Dat..
Rows
SUM(Sales)
$500,000
$400,000
$300,000
$200,000
$100,000
$0
Sales
2011
2012
2013
2014
2015
Month of Order Date
Data Source
Sheet 1
Sheet 2
48 marks
1 row by 1 column
SUM(Sales): $12,642,502

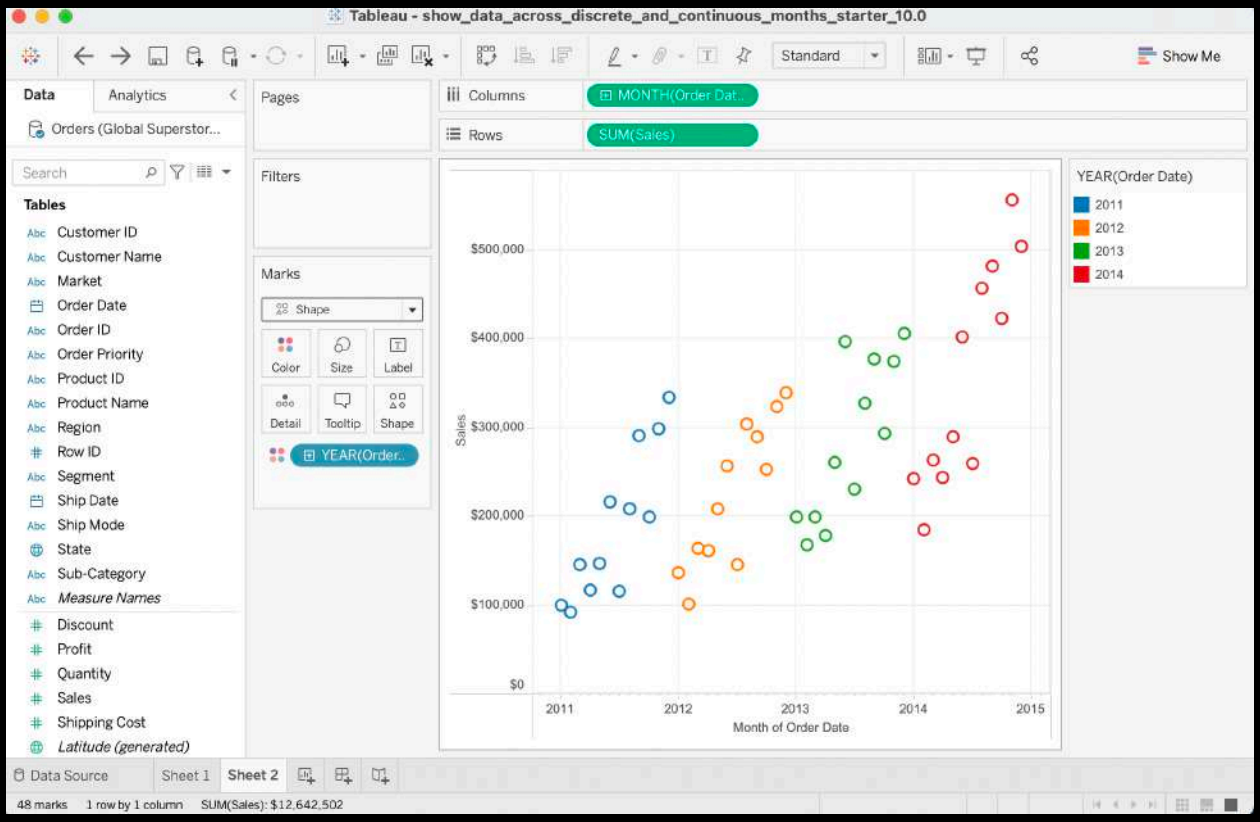


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Customer ID
Abc Customer Name
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
YEAR(Order...
Columns
MONTH(Order Dat...
Rows
SUM(Sales)
YEAR(Order Date)
2011
2012
2013
2014
$500,000
$400,000
$300,000
$200,000
$100,000
$0
Sales
2011
2012
2013
2014
2015
Month of Order Date
Data Source
Sheet 1
Sheet 2
48 marks
1 row by 1 column
SUM(Sales): $12,642,502

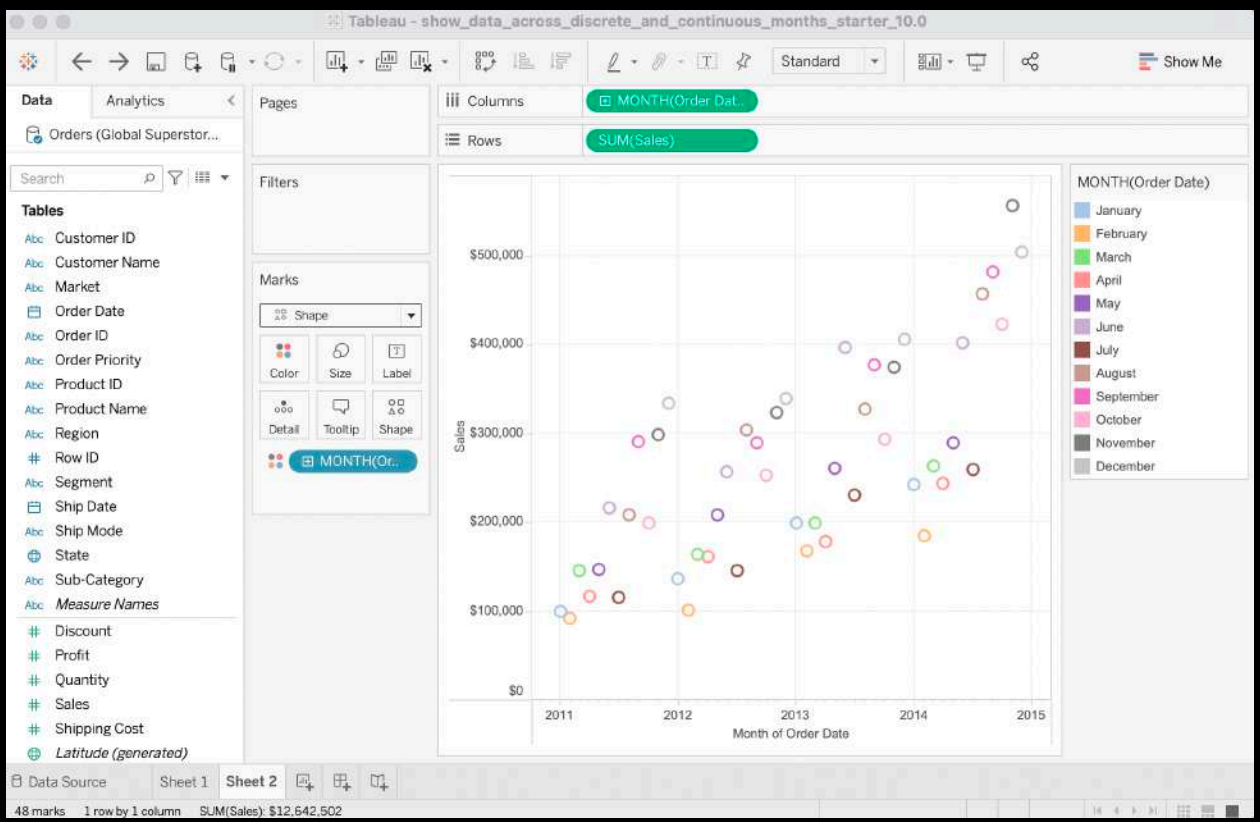


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Customer ID
Abc Customer Name
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
MONTH(Or...
Columns
MONTH(Order Dat...
Rows
SUM(Sales)
MONTH(Order Date)
January
February
March
April
May
June
July
August
September
October
November
December
$500,000
$400,000
$300,000
$200,000
$100,000
$0
Sales
2011
2012
2013
2014
2015
Month of Order Date
Data Source
Sheet 1
Sheet 2
48 marks
1 row by 1 column
SUM(Sales): $12,642,502

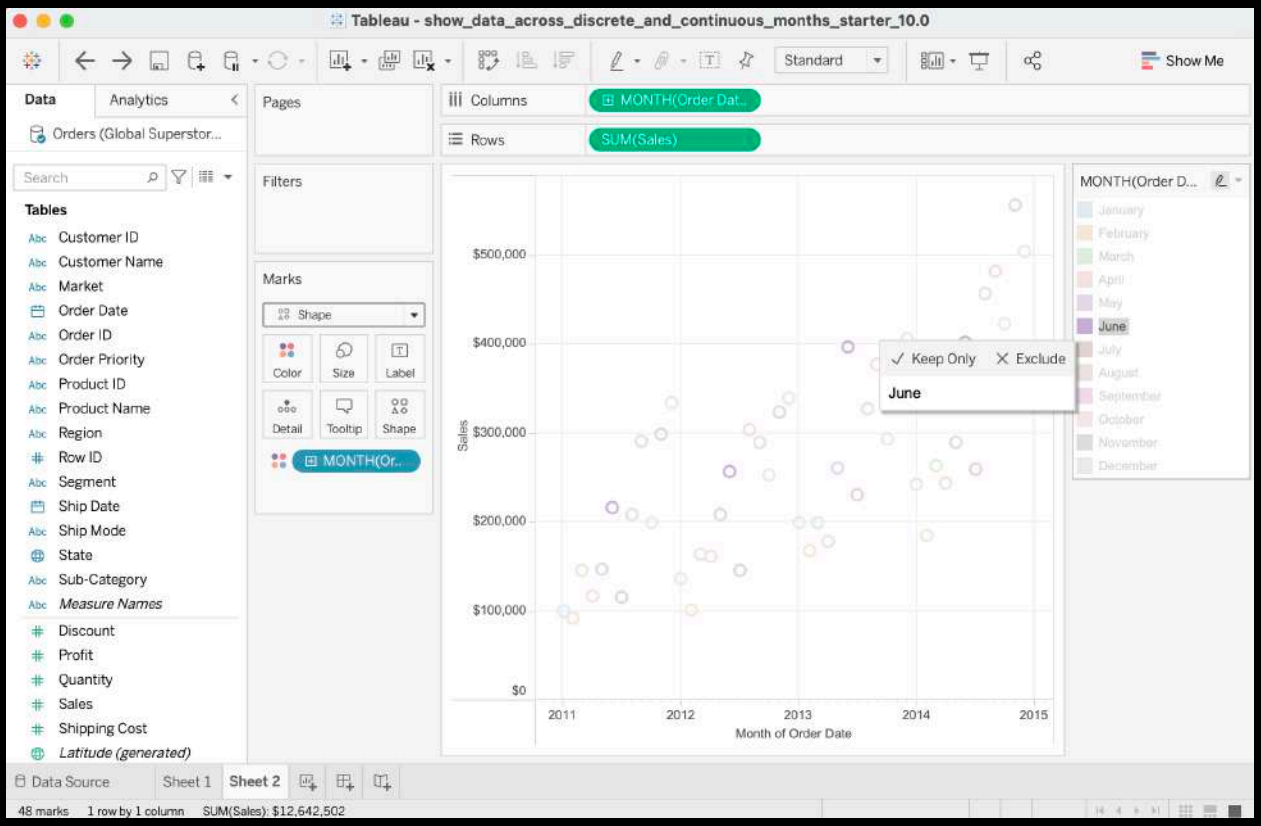


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
MONTH(Or...
Columns
MONTH(Order Dat...
Rows
SUM(Sales)
$500,000
$400,000
$300,000
$200,000
$100,000
$0
Sales
2011
2012
2013
2014
2015
Month of Order Date
Keep Only
Exclude
June
MONTH(Order D...
January
February
March
April
May
June
July
August
September
October
November
December
Data Source
Sheet 1
Sheet 2
48 marks
1 row by 1 column
SUM(Sales): $12,642,502

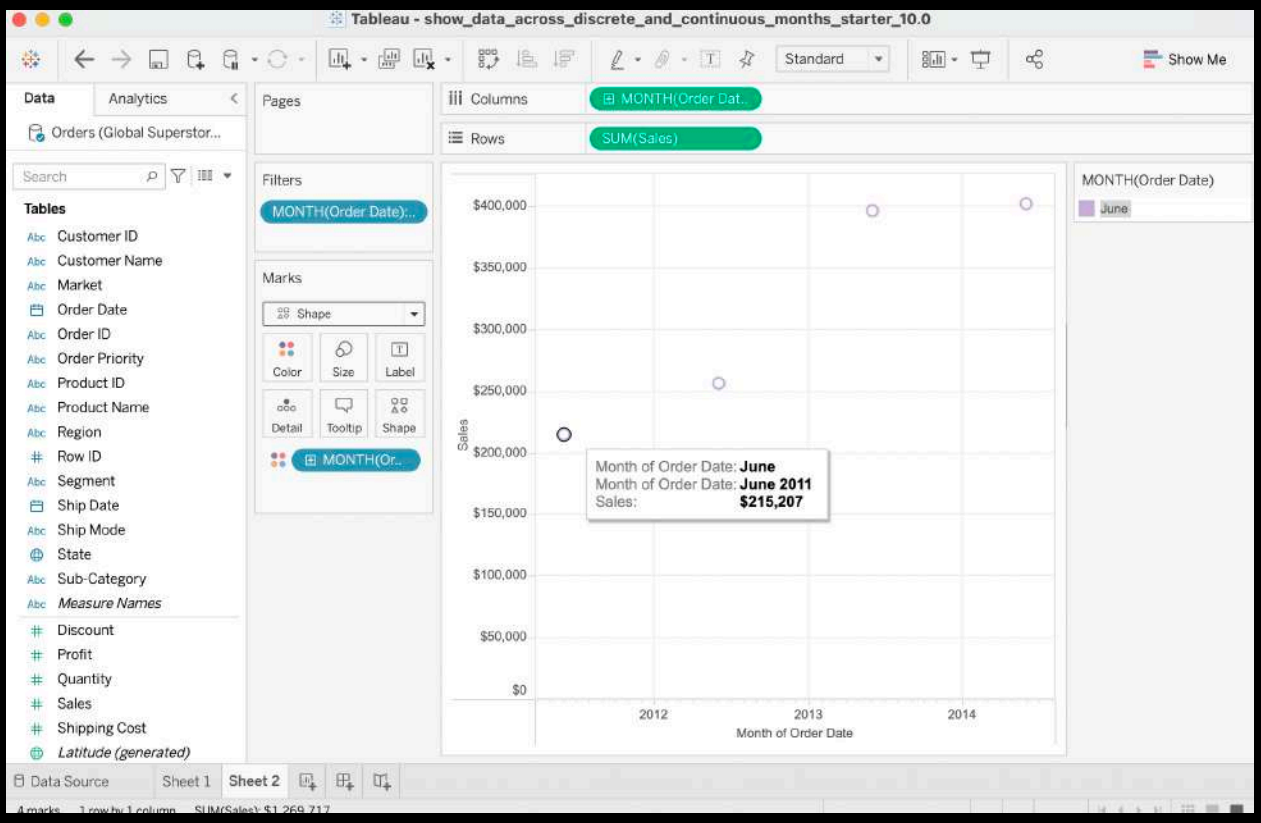


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
MONTH(Order Date):...
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
MONTH(Or...
Columns
MONTH(Order Dat...
Rows
SUM(Sales)
$400,000
$350,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0
Sales
2012
2013
2014
Month of Order Date
Month of Order Date: June
Month of Order Date: June 2011
Sales: $215,207
MONTH(Order Date)
June
Data Source
Sheet 1
Sheet 2

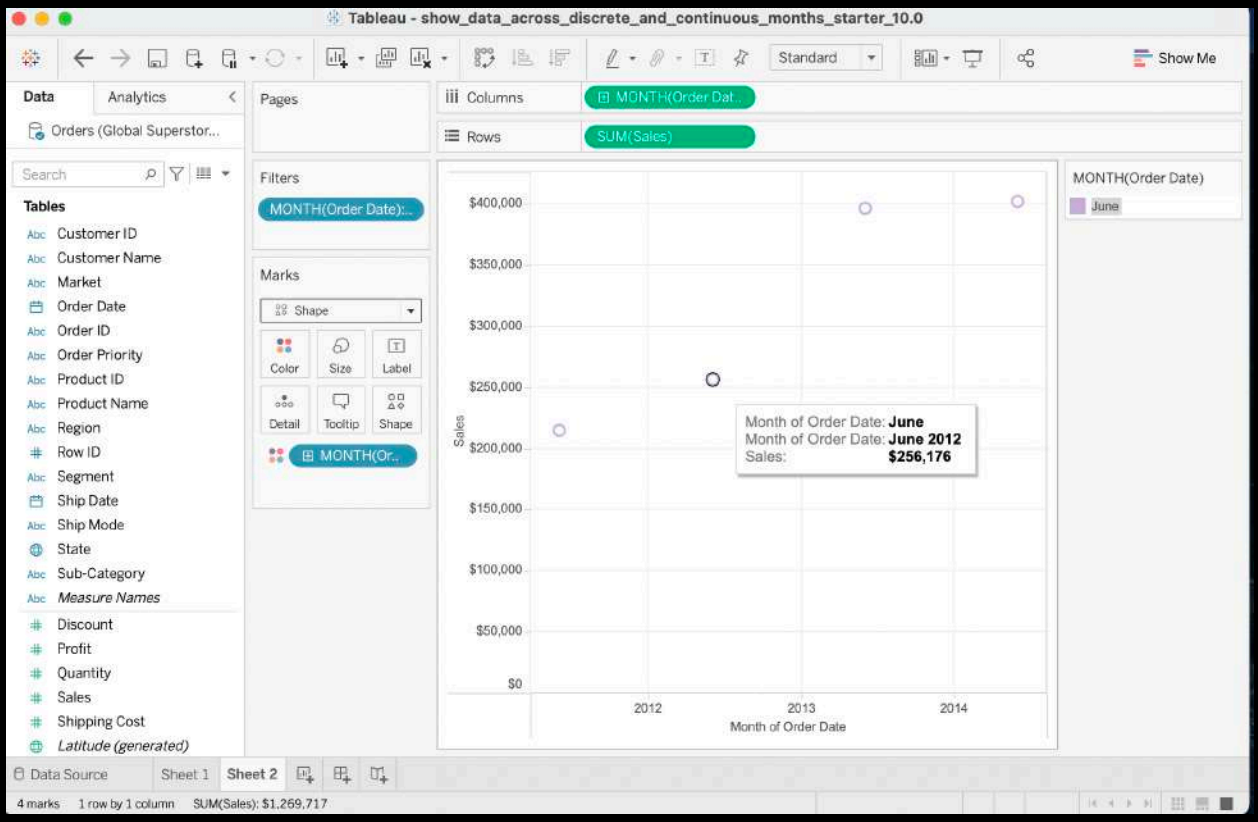


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
MONTH(Order Date):...
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
MONTH(Or...
Columns
MONTH(Order Dat...
Rows
SUM(Sales)
MONTH(Order Date)
June
$400,000
$350,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0
Sales
2012
2013
2014
Month of Order Date
Month of Order Date: June
Month of Order Date: June 2012
Sales: $256,176
Data Source
Sheet 1
Sheet 2
4 marks
1 row by 1 column
SUM(Sales): $1,269,717

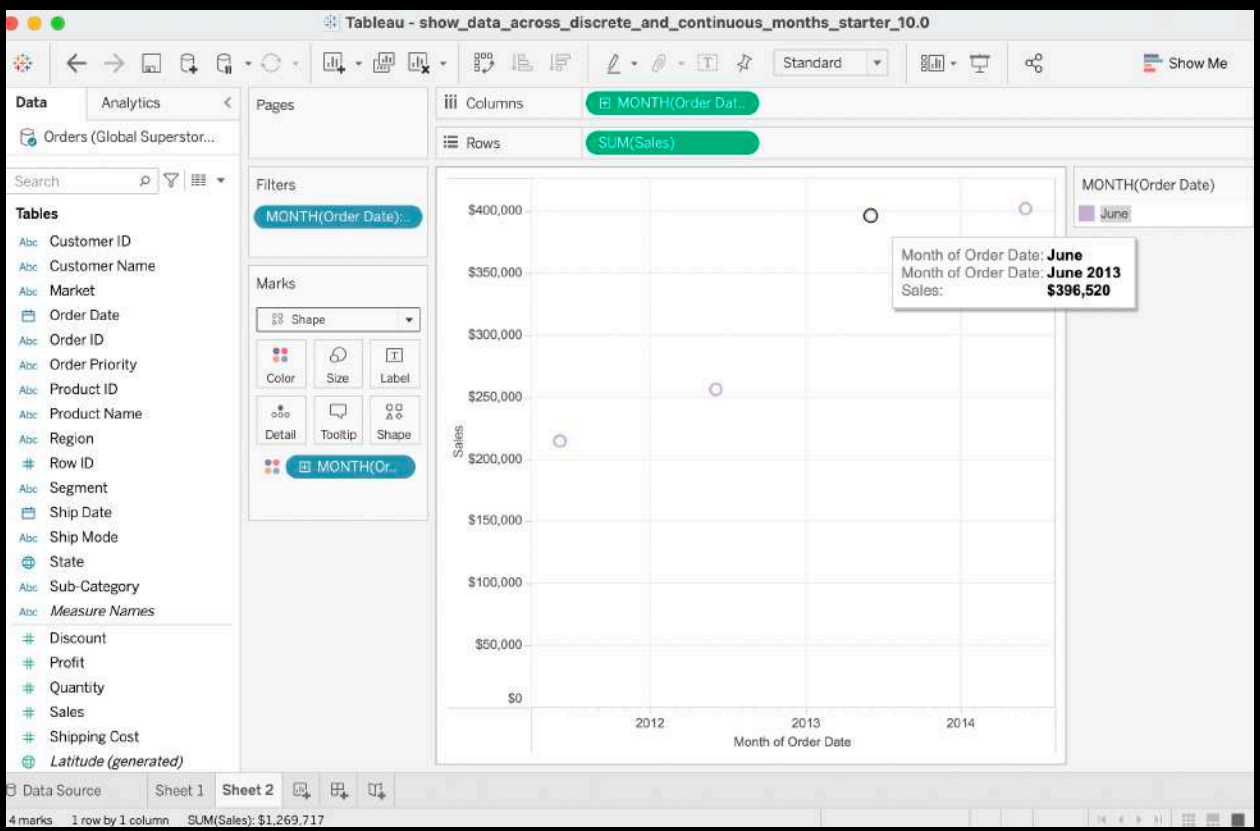


Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
MONTH(Order Date):...
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
MONTH(Or...
Columns
MONTH(Order Dat...
Rows
SUM(Sales)
MONTH(Order Date)
June
$400,000
$350,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0
Sales
2012
2013
2014
Month of Order Date
Month of Order Date: June
Month of Order Date: June 2013
Sales: $396,520
Data Source
Sheet 1
Sheet 2
4 marks
1 row by 1 column
SUM(Sales): $1,269,717

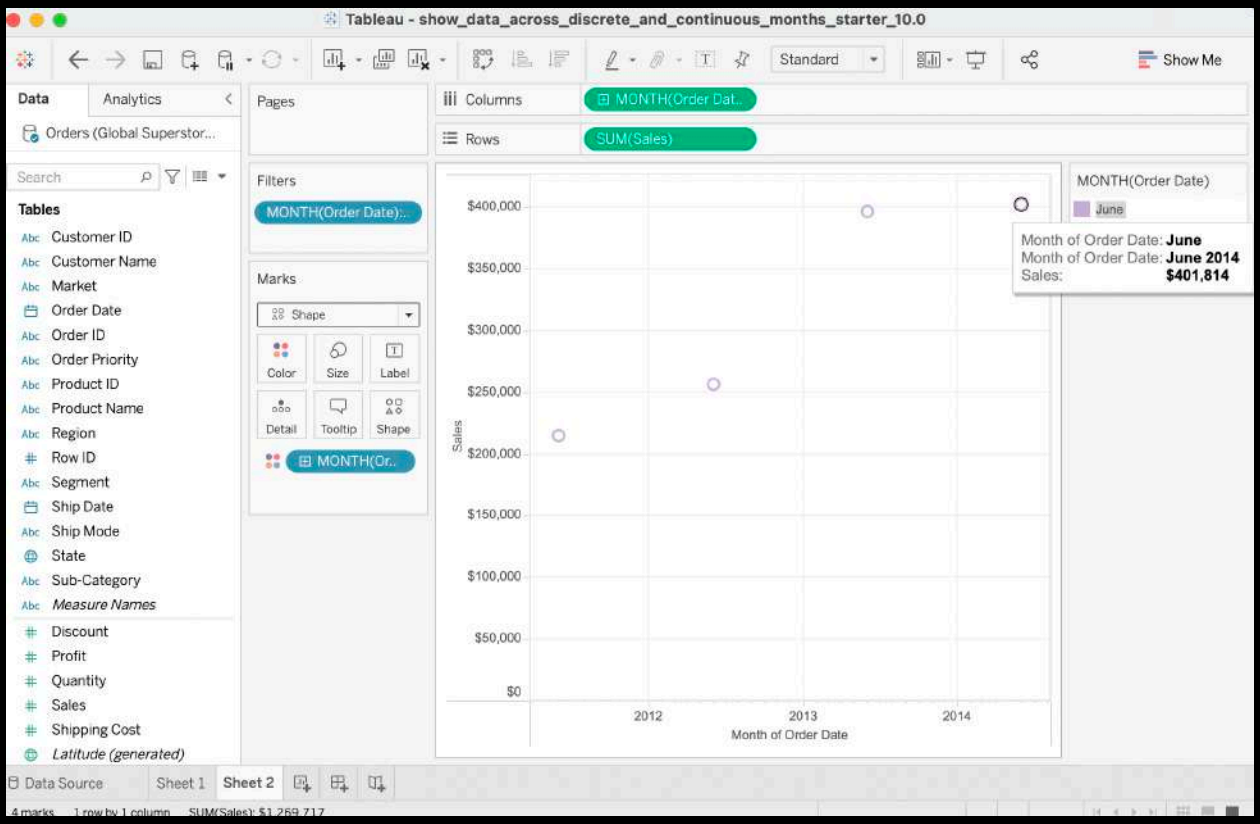


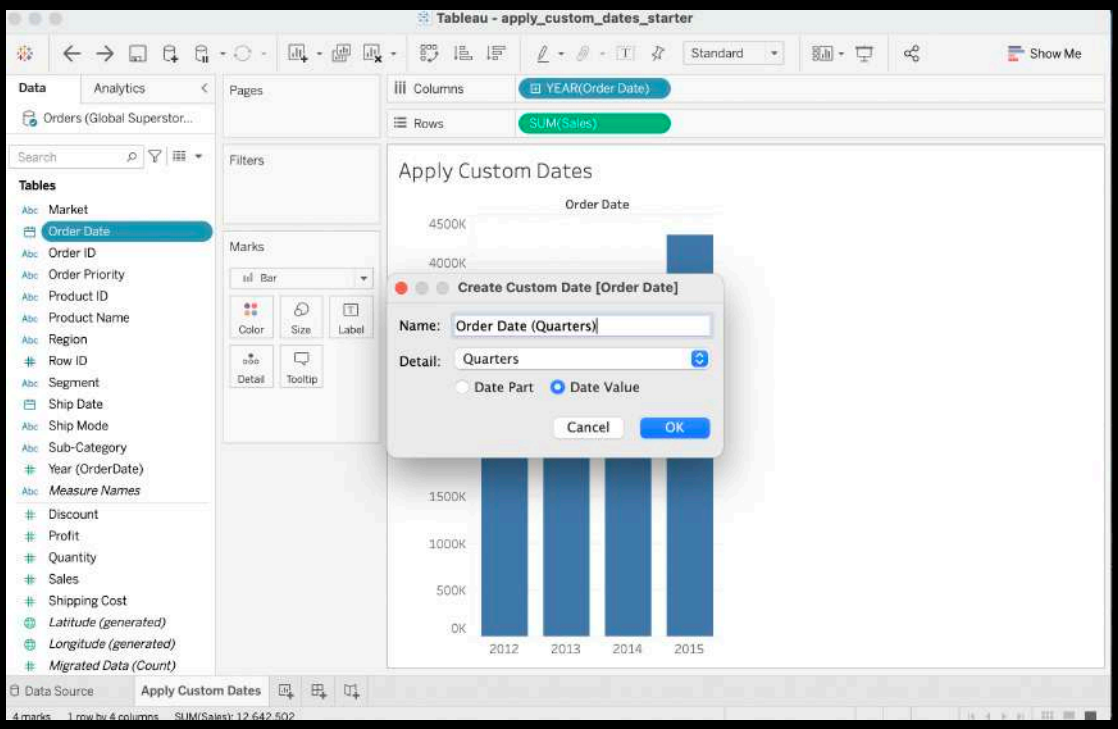
Tableau - show_data_across_discrete_and_continuous_months_starter_10.0
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Customer ID
Customer Name
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
State
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Filters
MONTH(Order Date)..
Marks
Shape
Color
Size
Label
Detail
Tooltip
Shape
MONTH(Or..
Columns
MONTH(Order Dat..
Rows
SUM(Sales)
$400,000
$350,000
$300,000
$250,000
$200,000
$150,000
$100,000
$50,000
$0
Sales
2012
2013
2014
Month of Order Date
MONTH(Order Date)
June
Month of Order Date: June
Month of Order Date: June 2014
Sales: $401,814
Data Source
Sheet 1
Sheet 2

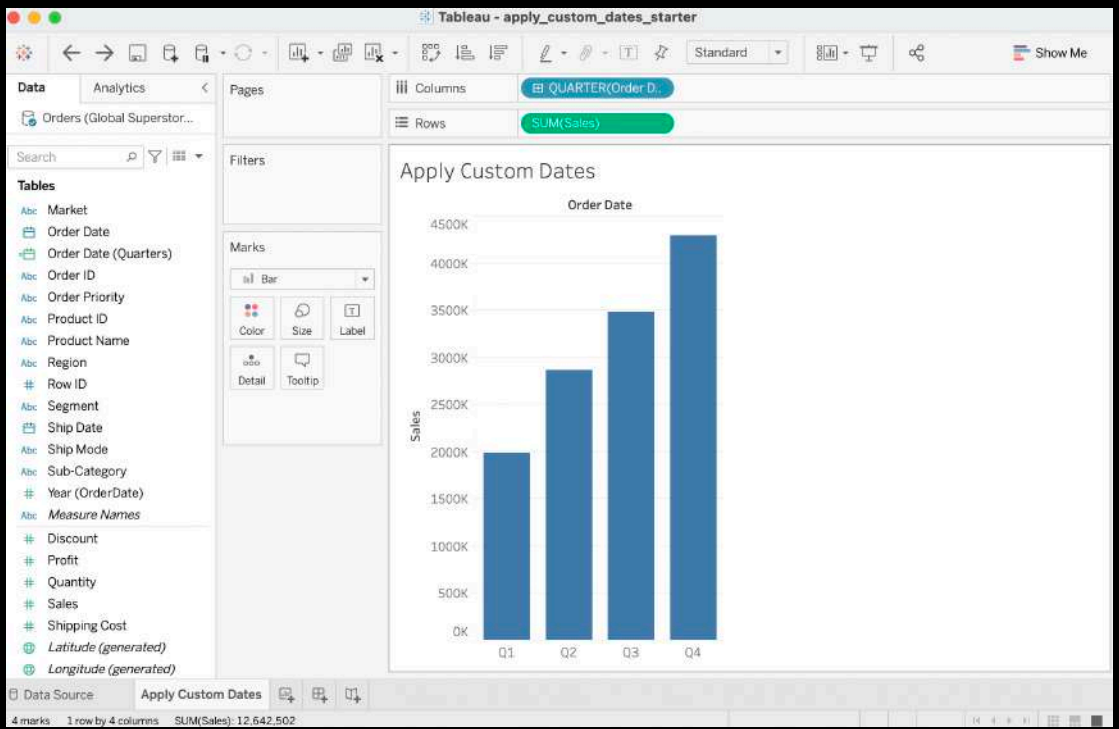
Apply Custom Dates

5. Question : In which quarter and year did sales total $914,709?

Answer: In the year 2013 and the 4th Quarter the total sales were $914,709.

Steps:





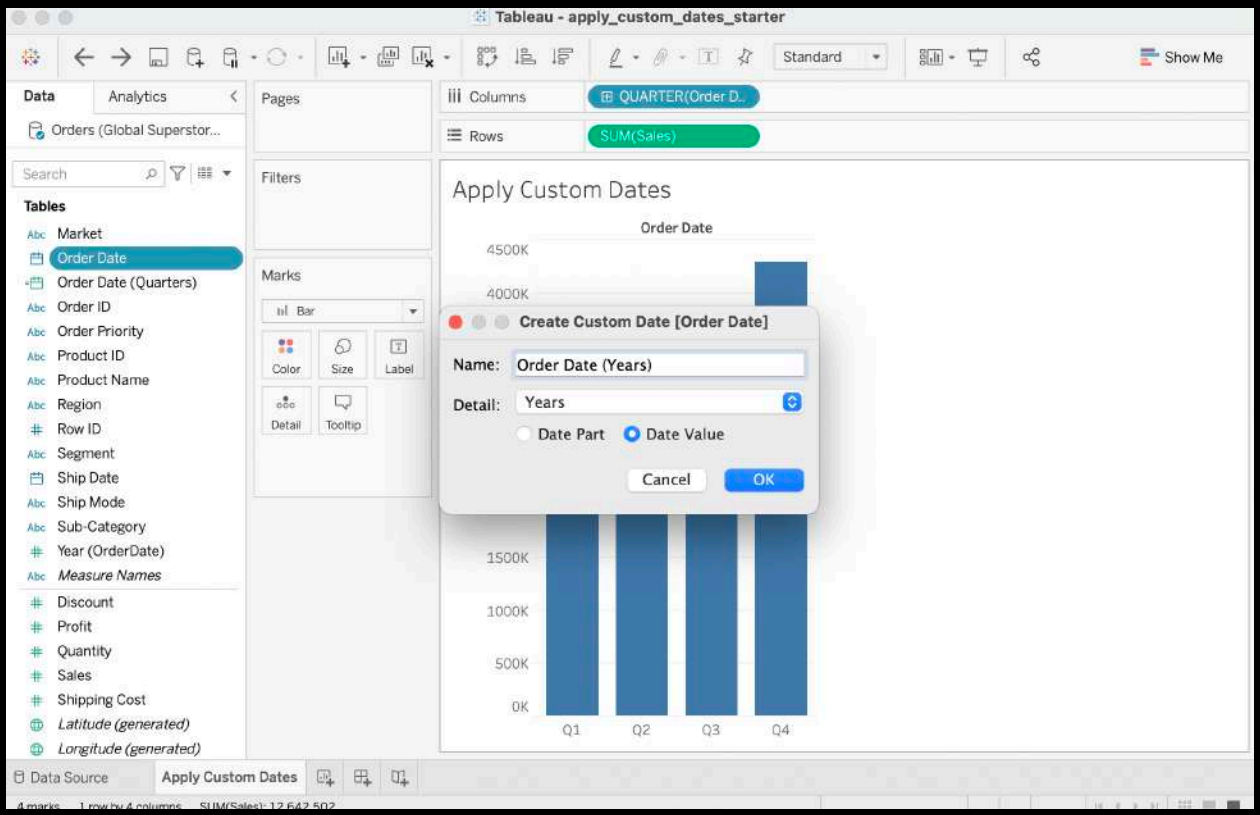


Tableau - apply_custom_dates_starter
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Market
Order Date
Order Date (Quarters)
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Year (OrderDate)
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Longitude (generated)
Pages
Filters
Marks
Bar
Color
Size
Label
Detail
Tooltip
Columns
QUARTER(Order D..
Rows
SUM(Sales)
Apply Custom Dates
Order Date
4500K
4000K
1500K
1000K
500K
0K
Q1
Q2
Q3
Q4
Create Custom Date [Order Date]
Name:
Order Date (Years)
Detail:
Years
Date Part
Date Value
Cancel
OK
Data Source
Apply Custom Dates

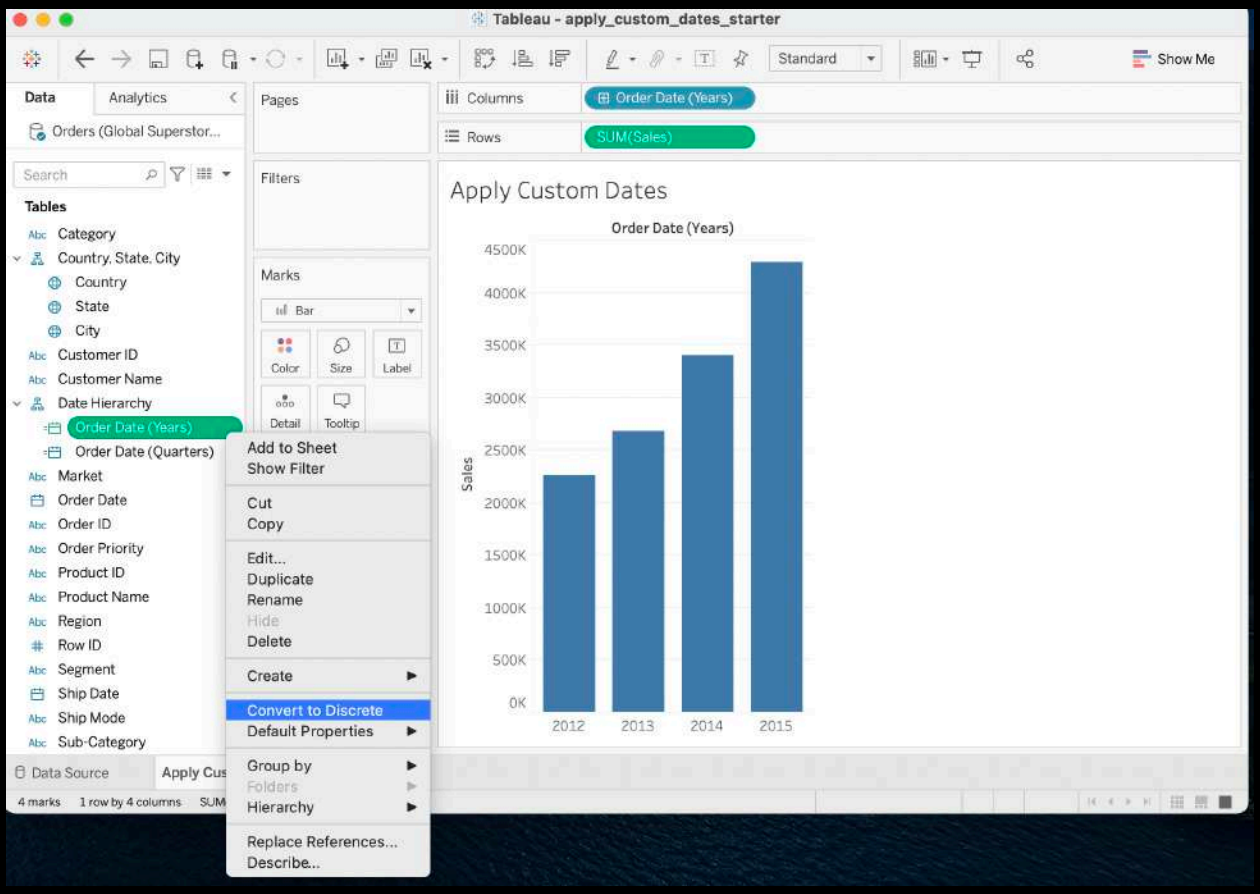


Tableau - apply_custom_dates_starter
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Category
Country, State, City
Country
State
City
Customer ID
Customer Name
Date Hierarchy
Order Date (Years)
Order Date (Quarters)
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Pages
Filters
Marks
Bar
Color
Size
Label
Detail
Tooltip
Columns
Order Date (Years)
Rows
SUM(Sales)
Apply Custom Dates
Order Date (Years)
Sales
4500K
4000K
3500K
3000K
2500K
2000K
1500K
1000K
500K
0K
2012
2013
2014
2015
Add to Sheet
Show Filter
Cut
Copy
Edit...
Duplicate
Rename
Hide
Delete
Create
Convert to Discrete
Default Properties
Group by
Folders
Hierarchy
Replace References...
Describe...
Data Source
4 marks
1 row by 4 columns

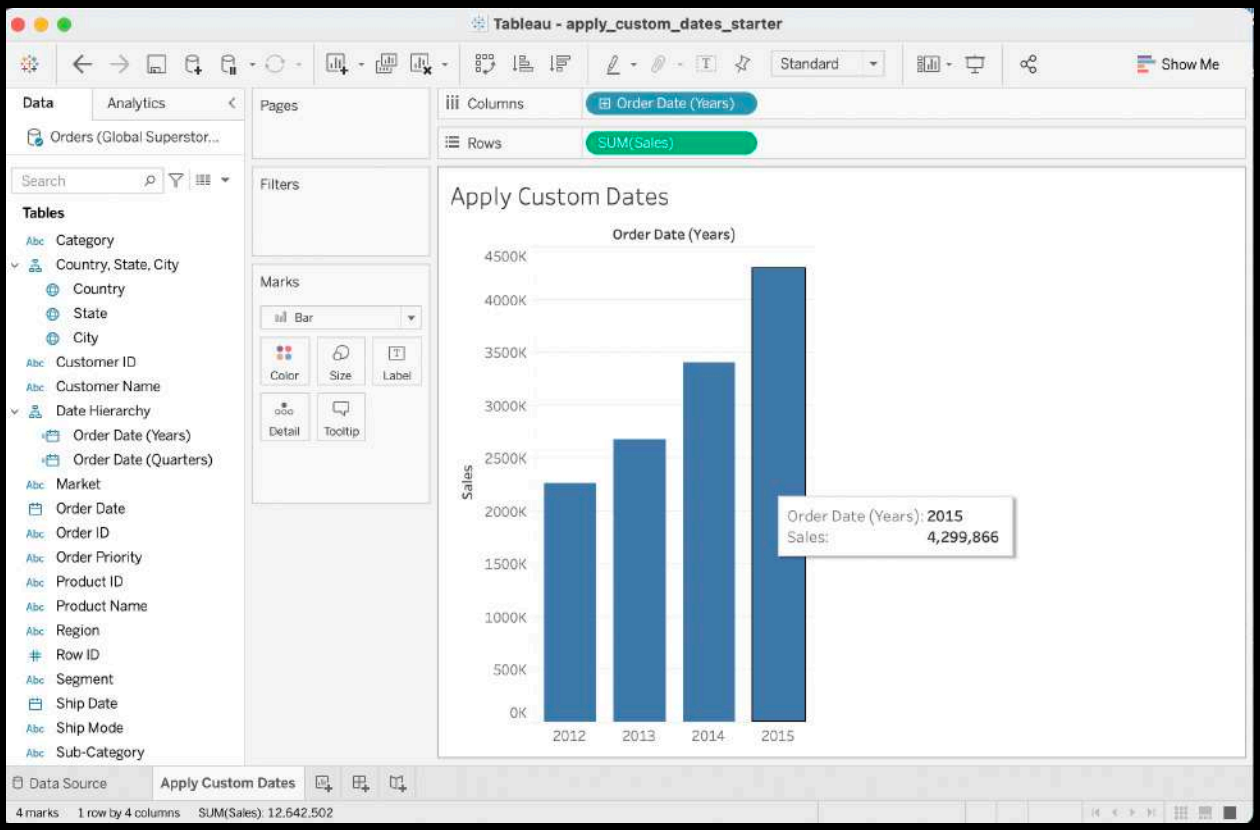


Tableau - apply_custom_dates_starter
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
Country, State, City
Country
State
City
Abc Customer ID
Abc Customer Name
Date Hierarchy
Order Date (Years)
Order Date (Quarters)
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
Abc Sub-Category
Pages
Filters
Marks
Bar
Color
Size
Label
Detail
Tooltip
Columns
Order Date (Years)
Rows
SUM(Sales)
Apply Custom Dates
Order Date (Years)
4500K
4000K
3500K
3000K
2500K
2000K
1500K
1000K
500K
0K
Sales
2012
2013
2014
2015
Order Date (Years): 2015
Sales: 4,299,866
Data Source
Apply Custom Dates
4 marks
1 row by 4 columns
SUM(Sales): 12,642,502

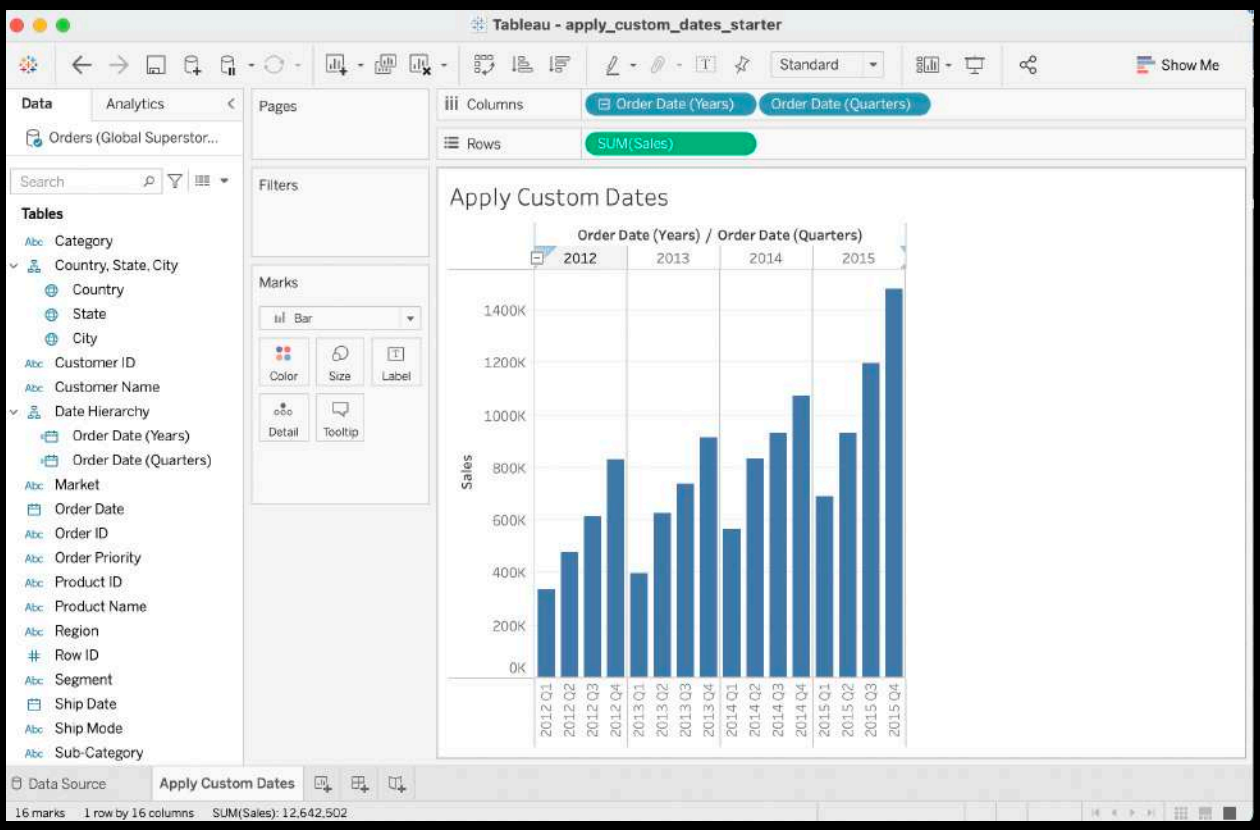
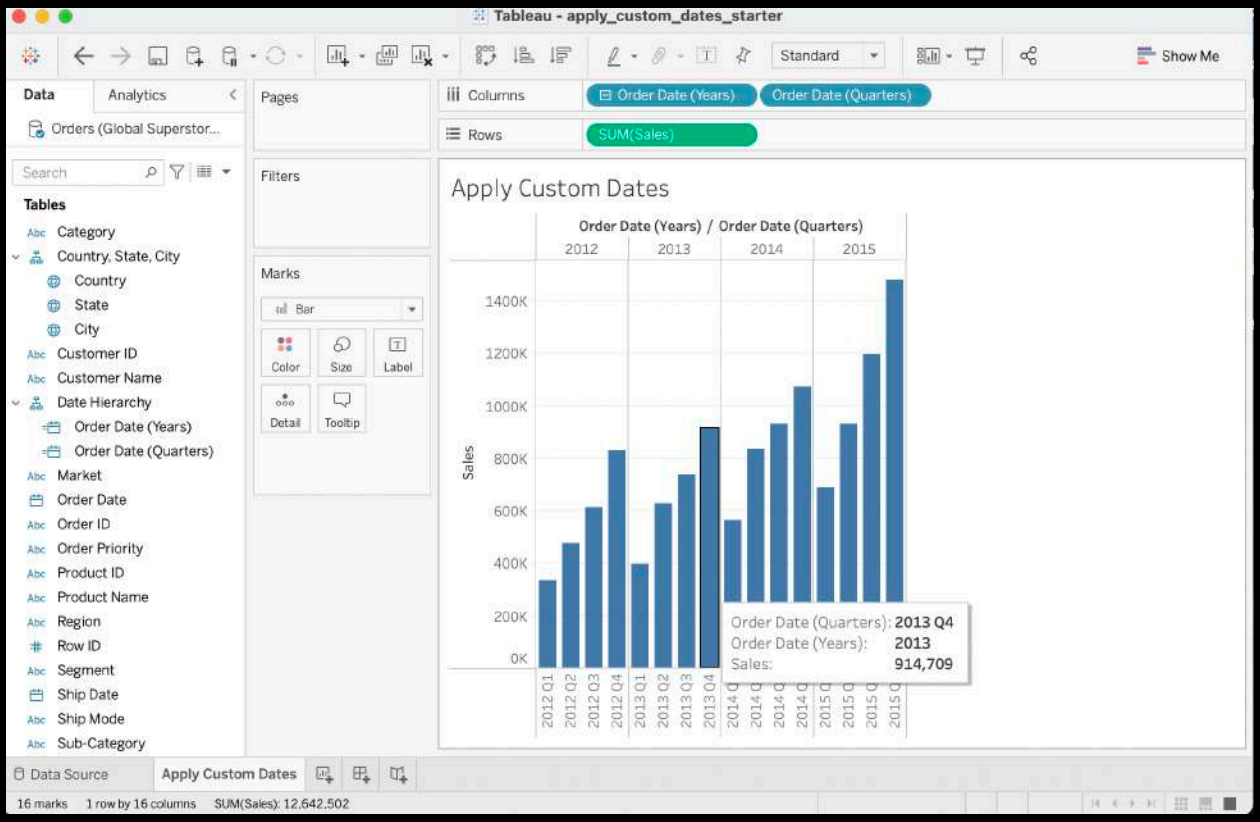


Tableau - apply_custom_dates_starter
Standard
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
Country, State, City
Country
State
City
Abc Customer ID
Abc Customer Name
Date Hierarchy
Order Date (Years)
Order Date (Quarters)
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
Abc Sub-Category
Pages
Filters
Marks
Bar
Color
Size
Label
Detail
Tooltip
Columns
Order Date (Years)
Order Date (Quarters)
Rows
SUM(Sales)
Apply Custom Dates
Order Date (Years) / Order Date (Quarters)
2012
2013
2014
2015
1400K
1200K
1000K
800K
600K
400K
200K
0K
Sales
2012 Q1
2012 Q2
2012 Q3
2012 Q4
2013 Q1
2013 Q2
2013 Q3
2013 Q4
2014 Q1
2014 Q2
2014 Q3
2014 Q4
2015 Q1
2015 Q2
2015 Q3
2015 Q4
Data Source
Apply Custom Dates
16 marks
1 row by 16 columns
SUM(Sales): 12,642,502



Build a Combo Chart

6. Question: In which month/year was the predicted Budget Sales closest to actual Sales?

Answer: In the year 2013 the Budget Sales are $32k and Sales are $33K which is almost near to the predicted value.

Steps:

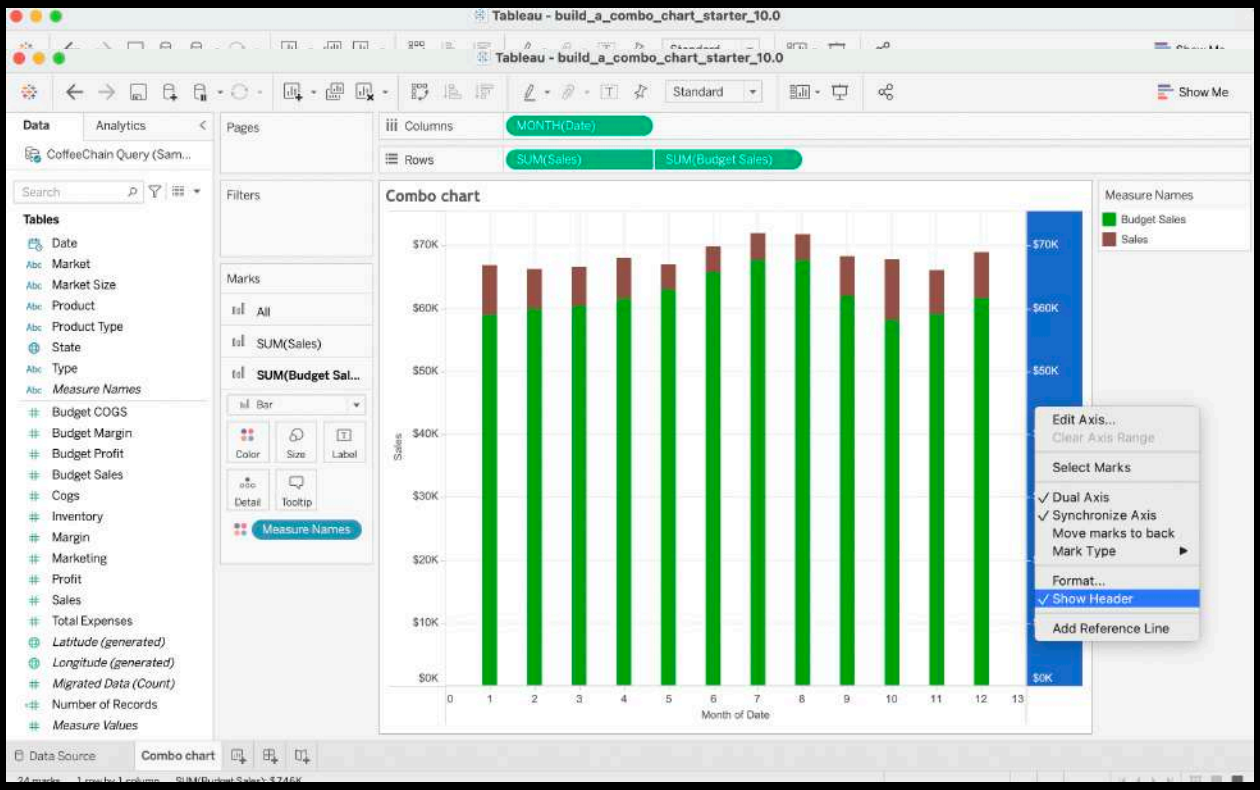


Tableau - build_a_combo_chart_starter_10.0
Data
Analytics
CoffeeChain Query (Sam...
Search
Tables
Date
Market
Market Size
Product
Product Type
State
Type
Measure Names
Budget COGS
Budget Margin
Budget Profit
Budget Sales
Cogs
Inventory
Margin
Marketing
Profit
Sales
Total Expenses
Latitude (generated)
Longitude (generated)
Migrated Data (Count)
Number of Records
Measure Values
Pages
Filters
Marks
All
SUM(Sales)
SUM(Budget Sal...
Bar
Color
Size
Label
Detail
Tooltip
Measure Names
Columns
MONTH(Date)
Rows
SUM(Sales)
SUM(Budget Sales)
Standard
Show Me
Combo chart
Measure Names
Budget Sales
Sales
$70K
$60K
$50K
$40K
$30K
$20K
$10K
$0K
Sales
0 1 2 3 4 5 6 7 8 9 10 11 12 13
Month of Date
Edit Axis...
Clear Axis Range
Select Marks
Dual Axis
Synchronize Axis
Move marks to back
Mark Type
Format...
Show Header
Add Reference Line
Data Source
Combo chart

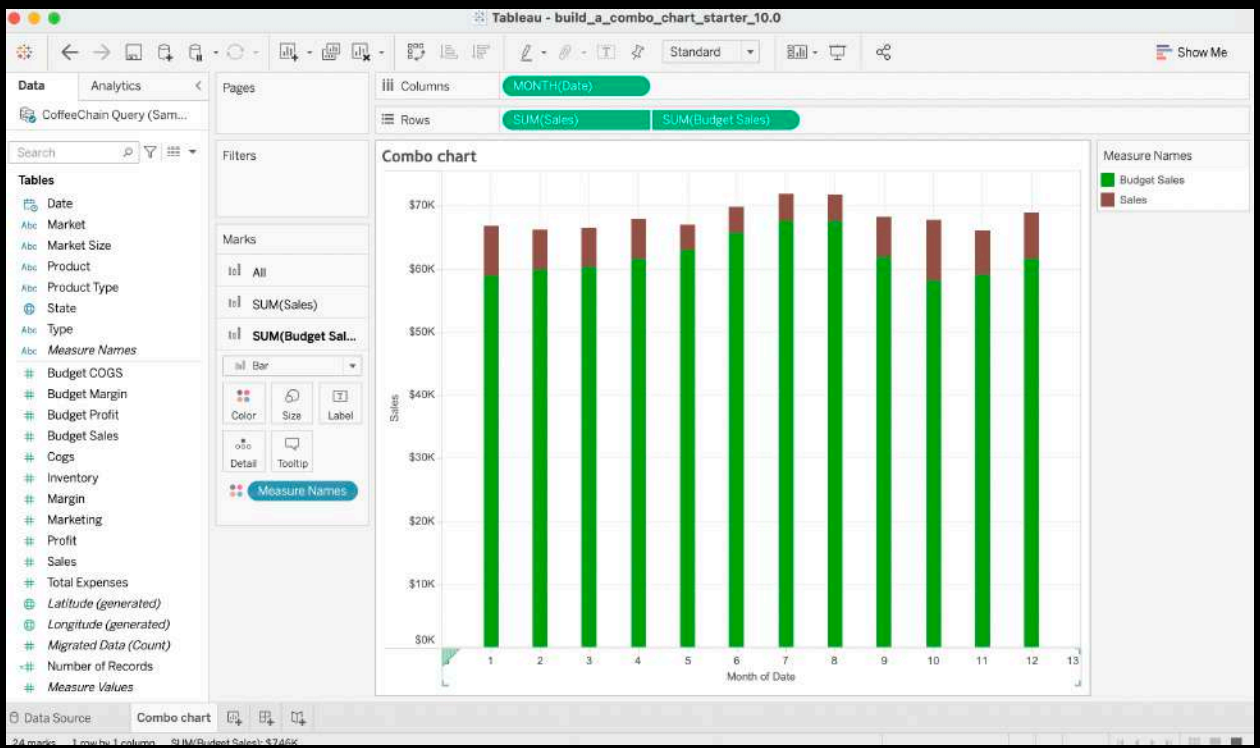


Tableau - build_a_combo_chart_starter_10.0
Data
Analytics
CoffeeChain Query (Sam...
Search
Tables
Date
Market
Market Size
Product
Product Type
State
Type
Measure Names
Budget COGS
Budget Margin
Budget Profit
Budget Sales
Cogs
Inventory
Margin
Marketing
Profit
Sales
Total Expenses
Latitude (generated)
Longitude (generated)
Migrated Data (Count)
Number of Records
Measure Values
Pages
Filters
Marks
All
SUM(Sales)
SUM(Budget Sal...
Bar
Color
Size
Label
Detail
Tooltip
Measure Names
Columns
MONTH(Date)
Rows
SUM(Sales)
SUM(Budget Sales)
Standard
Show Me
Combo chart
Measure Names
Budget Sales
Sales
$70K
$60K
$50K
$40K
$30K
$20K
$10K
$0K
Sales
1 2 3 4 5 6 7 8 9 10 11 12 13
Month of Date
Data Source
Combo chart

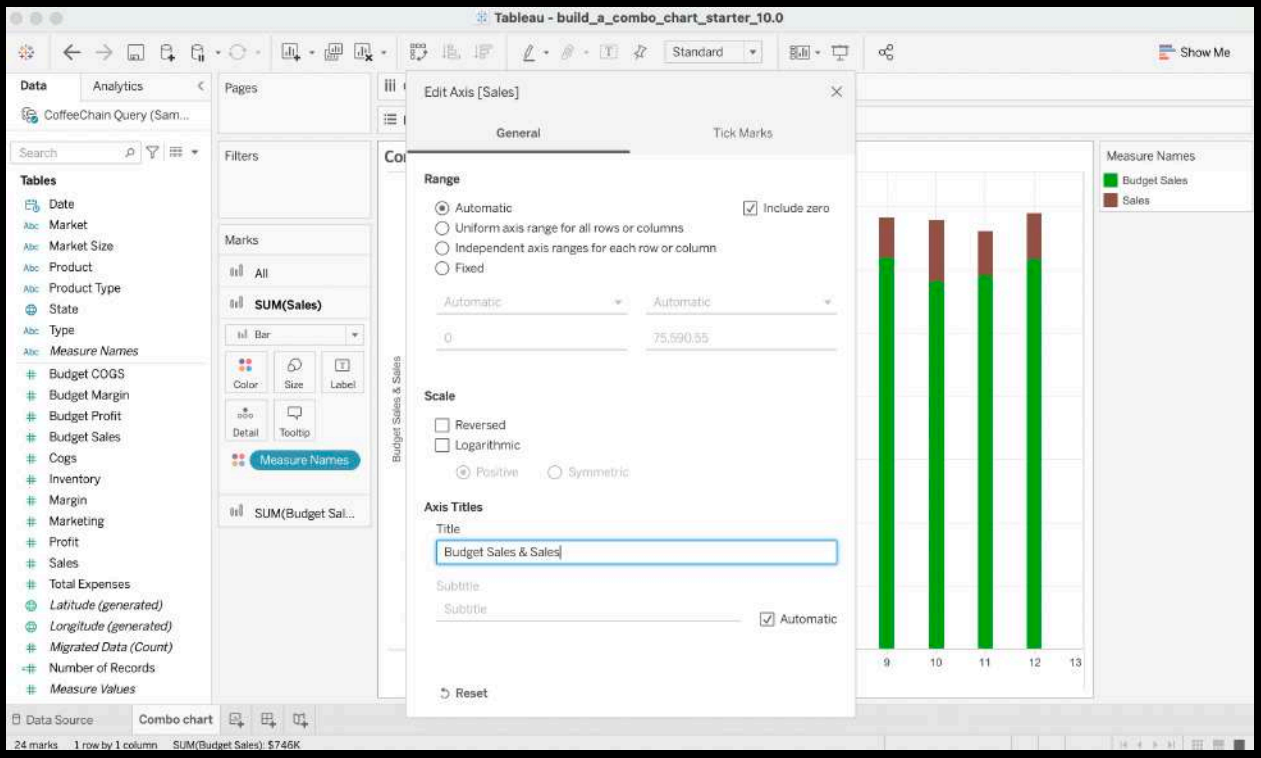


Tableau - build_a_combo_chart_starter_10.0
Edit Axis [Sales]
General
Tick Marks
Range
Automatic
Uniform axis range for all rows or columns
Independent axis ranges for each row or column
Fixed
Include zero
Scale
Reversed
Logarithmic
Positive
Symmetric
Axis Titles
Title
Budget Sales & Sales
Subtitle
Automatic
Reset
Measure Names
Budget Sales
Sales
Data Source
Combo chart

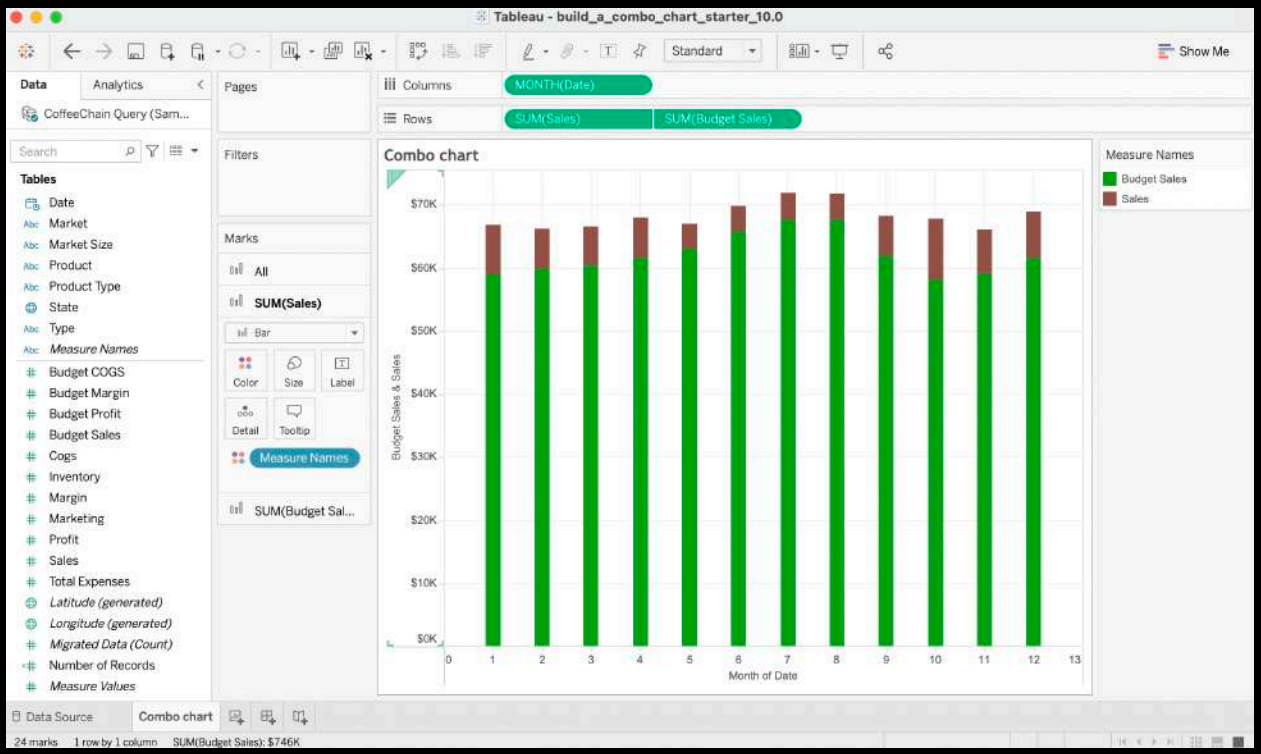


Tableau - build_a_combo_chart_starter_10.0
Columns
MONTH(Date)
Rows
SUM(Sales)
SUM(Budget Sales)
Combo chart
Budget Sales & Sales
Month of Date
Measure Names
Budget Sales
Sales
Data Source
Combo chart

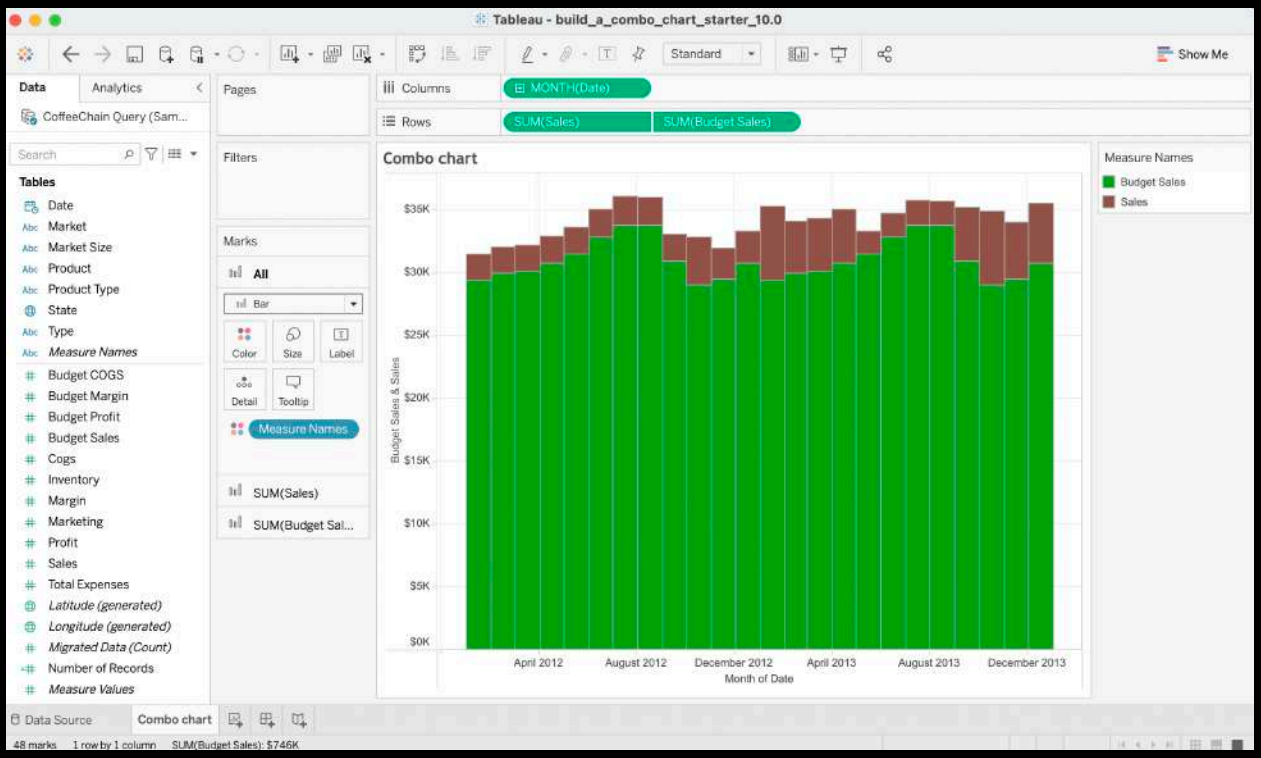


Tableau - build_a_combo_chart_starter_10.0
Standard
Show Me
Data
Analytics
CoffeeChain Query (Sam...
Search
Tables
Date
Market
Market Size
Product
Product Type
State
Type
Measure Names
Budget COGS
Budget Margin
Budget Profit
Budget Sales
Cogs
Inventory
Margin
Marketing
Profit
Sales
Total Expenses
Latitude (generated)
Longitude (generated)
Migrated Data (Count)
Number of Records
Measure Values
Pages
Filters
Marks
All
Bar
Color
Size
Label
Detail
Tooltip
Measure Names
SUM(Sales)
SUM(Budget Sal...
Columns
MONTH(Date)
Rows
SUM(Sales)
SUM(Budget Sales)
Combo chart
Measure Names
Budget Sales
Sales
$35K
$30K
$25K
$20K
$15K
$10K
$5K
$0K
Budget Sales & Sales
April 2012
August 2012
December 2012
April 2013
August 2013
December 2013
Month of Date
Data Source
Combo chart
48 marks
1 row by 1 column
SUM(Budget Sales): $746K

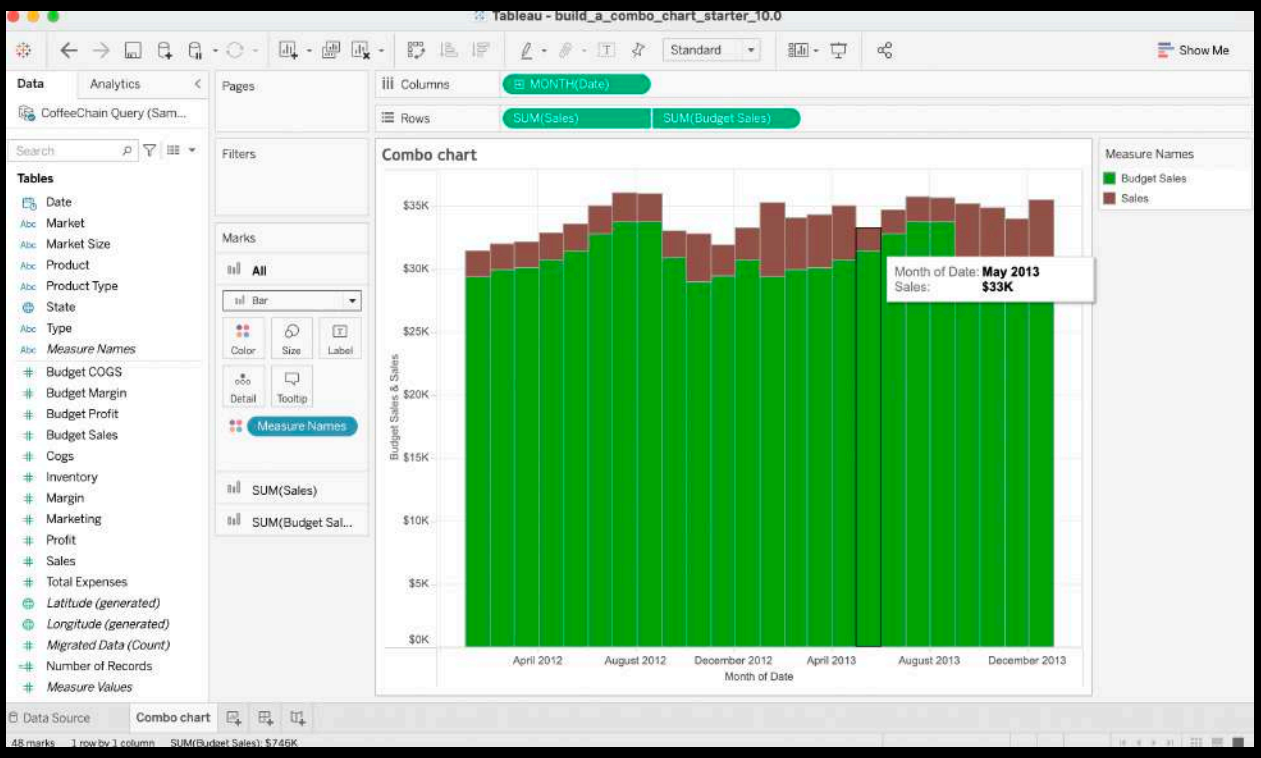
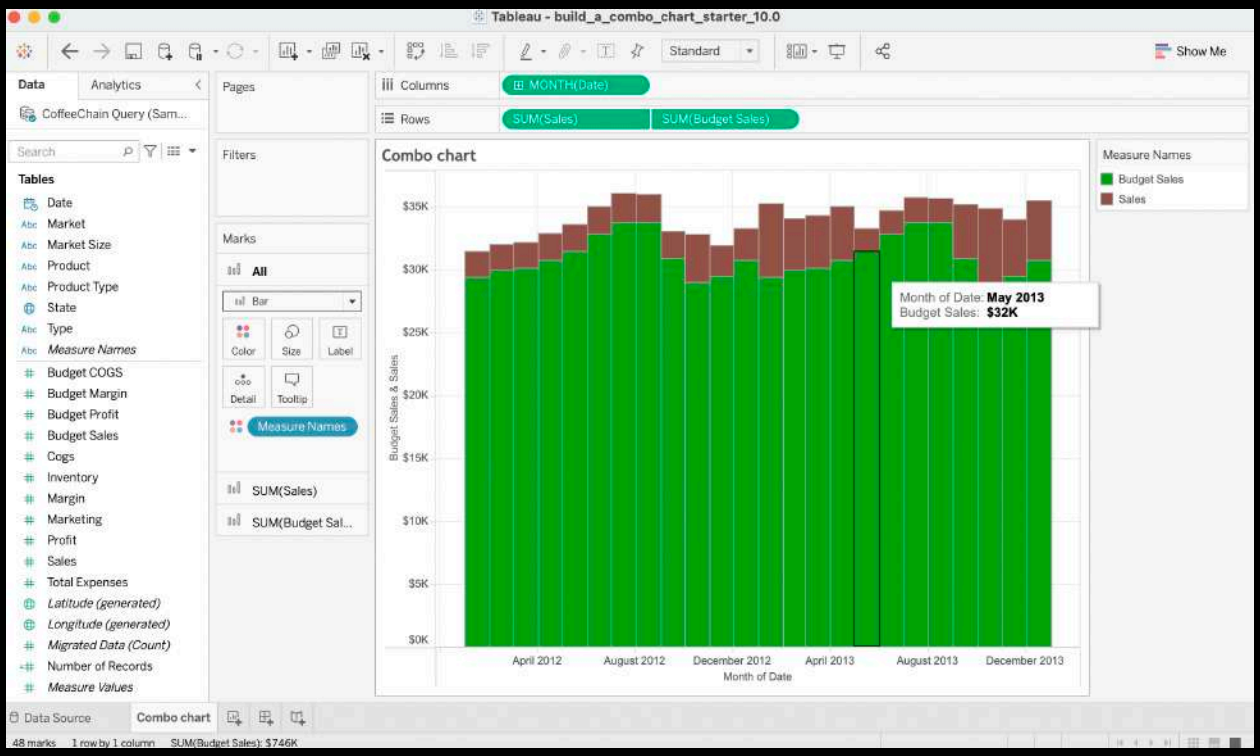


Tableau - build_a_combo_chart_starter_10.0
Standard
Show Me
Data
Analytics
CoffeeChain Query (Sam...
Search
Tables
Date
Market
Market Size
Product
Product Type
State
Type
Measure Names
Budget COGS
Budget Margin
Budget Profit
Budget Sales
Cogs
Inventory
Margin
Marketing
Profit
Sales
Total Expenses
Latitude (generated)
Longitude (generated)
Migrated Data (Count)
Number of Records
Measure Values
Pages
Filters
Marks
All
Bar
Color
Size
Label
Detail
Tooltip
Measure Names
SUM(Sales)
SUM(Budget Sal...
Columns
MONTH(Date)
Rows
SUM(Sales)
SUM(Budget Sales)
Combo chart
Measure Names
Budget Sales
Sales
Month of Date: May 2013
Sales: $33K
$35K
$30K
$25K
$20K
$15K
$10K
$5K
$0K
Budget Sales & Sales
April 2012
August 2012
December 2012
April 2013
August 2013
December 2013
Month of Date
Data Source
Combo chart
48 marks
1 row by 1 column
SUM(Budget Sales): $746K



Build a Symbol Map

7. Question : What was the total profit for Bangkok, Thailand?

Answer: The total profit for Bangkok, Thailand is $5814 and sales of $33401.

Steps:

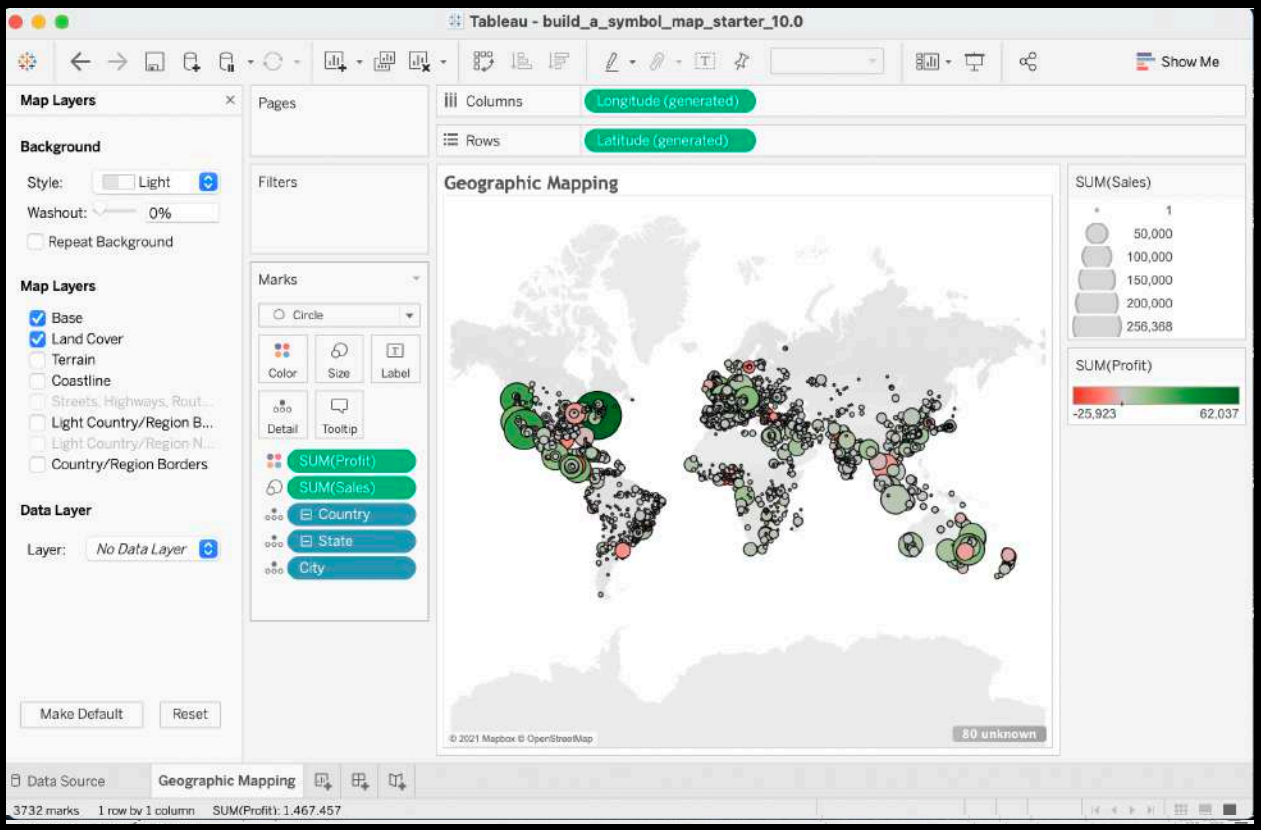


Tableau - build_a_symbol_map_starter_10.0
Show Me
Map Layers
Background
Style: Light
Washout: 0%
Repeat Background
Map Layers
Base
Land Cover
Terrain
Coastline
Streets, Highways, Rout...
Light Country/Region B...
Light Country/Region N...
Country/Region Borders
Data Layer
Layer: No Data Layer
Make Default
Reset
Pages
Filters
Marks
Circle
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Sales)
Country
State
City
Columns
Longitude (generated)
Rows
Latitude (generated)
Geographic Mapping
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
© 2021 Mapbox © OpenStreetMap
80 unknown
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

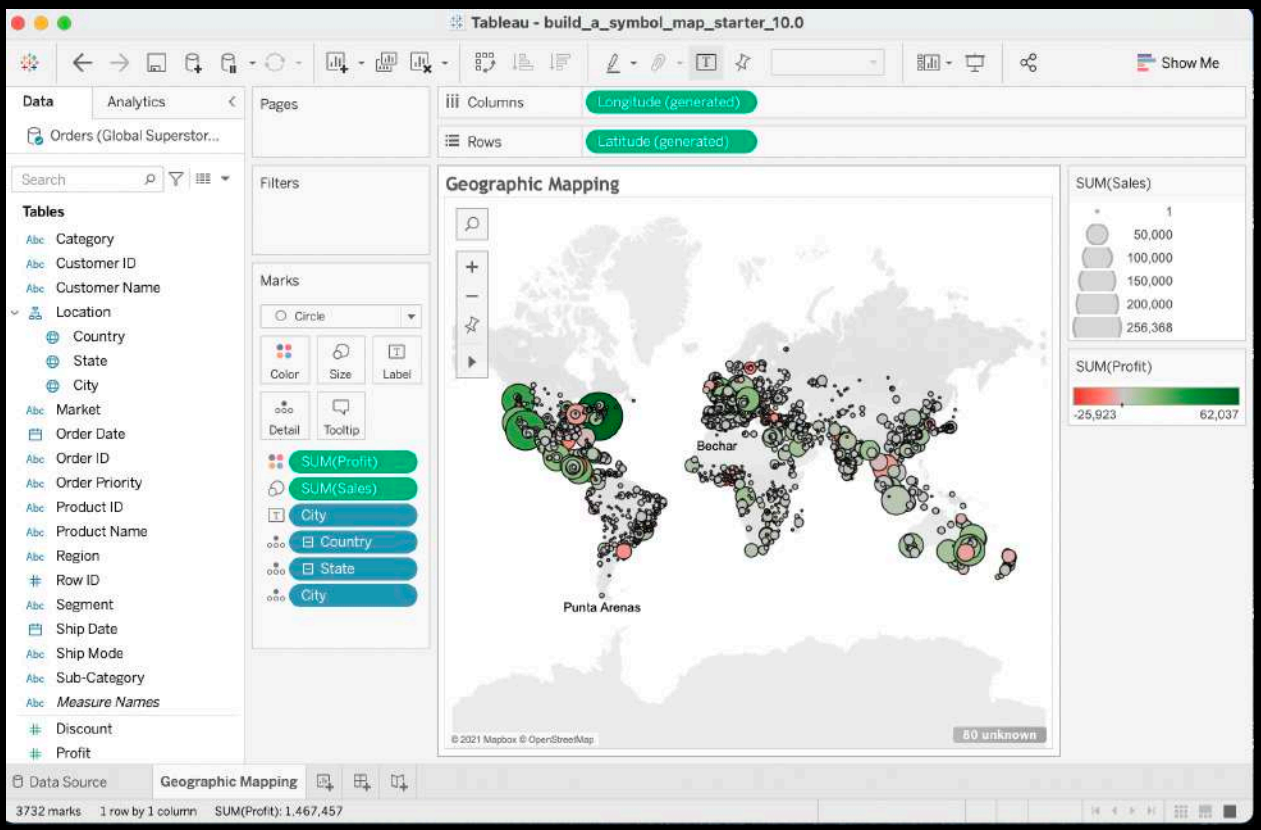


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
Abc Customer ID
Abc Customer Name
Location
Country
State
City
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
Abc Sub-Category
Measure Names
Discount
Profit
Pages
Filters
Marks
Circle
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Sales)
City
Country
State
City
Columns
Longitude (generated)
Rows
Latitude (generated)
Geographic Mapping
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
Bechar
Punta Arenas
© 2021 Mapbox © OpenStreetMap
80 unknown
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

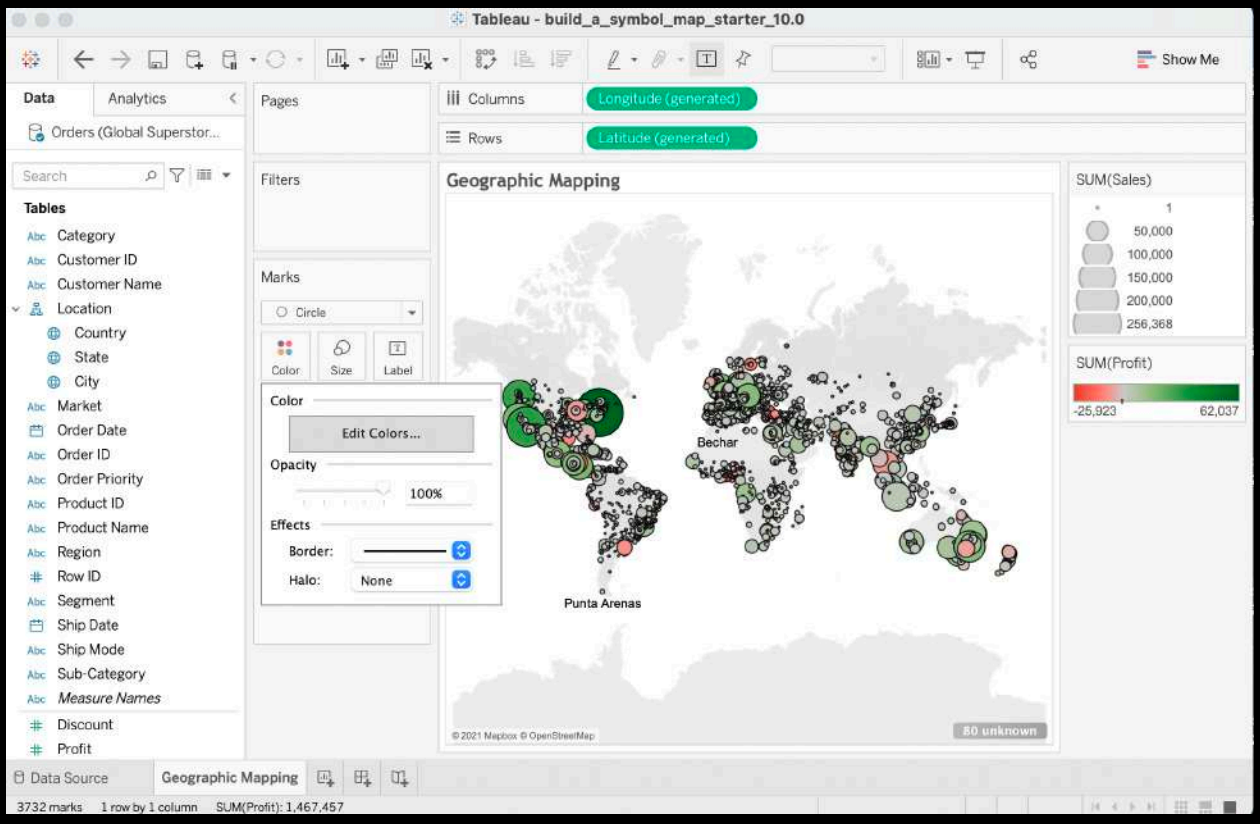


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
Abc Customer ID
Abc Customer Name
Location
Country
State
City
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
Abc Sub-Category
Abc Measure Names
Discount
Profit
Pages
Filters
Marks
Circle
Color
Size
Label
Color
Edit Colors...
Opacity
100%
Effects
Border:
Halo:
None
Columns
Longitude (generated)
Rows
Latitude (generated)
Geographic Mapping
Bechar
Punta Arenas
© 2021 Mapbox © OpenStreetMap
80 unknown
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

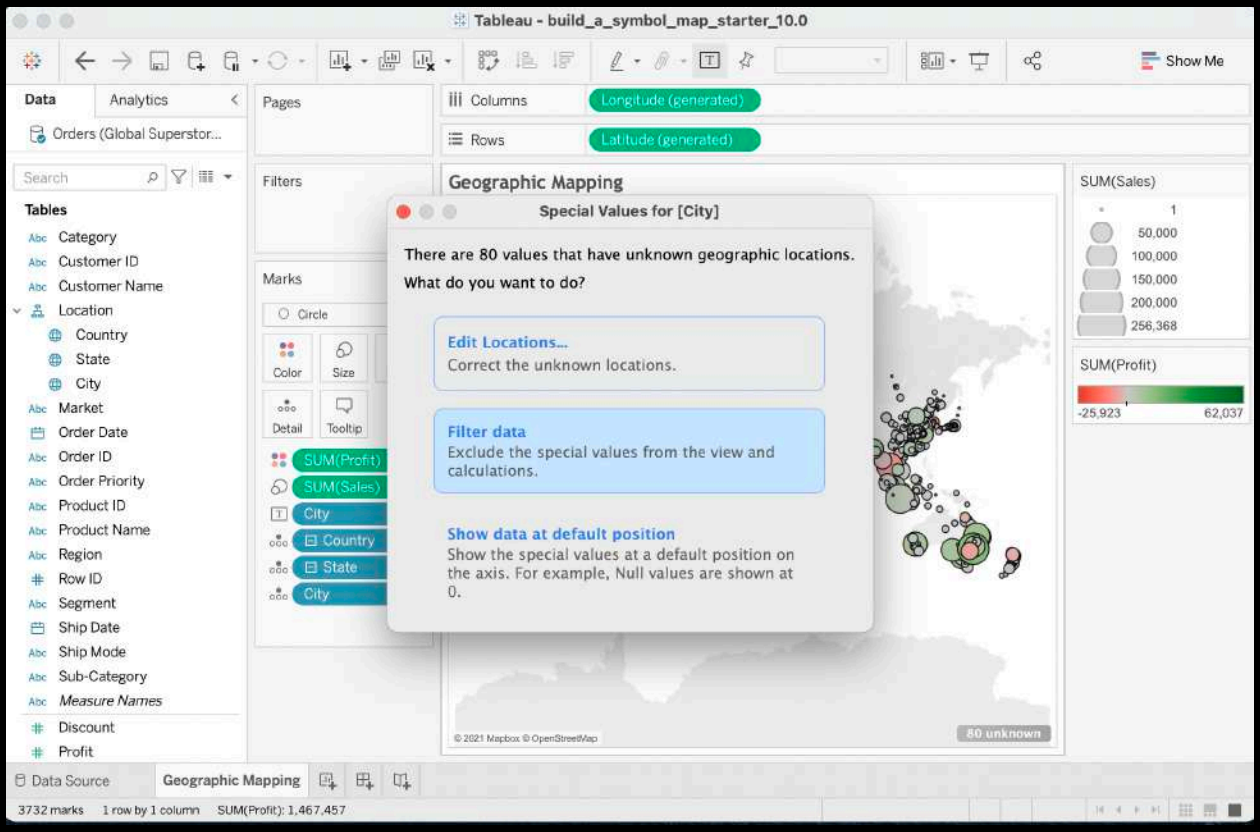


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
Abc Customer ID
Abc Customer Name
Location
Country
State
City
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
Abc Sub-Category
Abc Measure Names
Discount
Profit
Pages
Filters
Marks
Circle
Color
Size
Detail
Tooltip
SUM(Profit)
SUM(Sales)
City
Country
State
City
Columns
Longitude (generated)
Rows
Latitude (generated)
Geographic Mapping
Special Values for [City]
There are 80 values that have unknown geographic locations.
What do you want to do?
Edit Locations...
Correct the unknown locations.
Filter data
Exclude the special values from the view and calculations.
Show data at default position
Show the special values at a default position on the axis. For example, Null values are shown at 0.
© 2021 Mapbox © OpenStreetMap
80 unknown
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

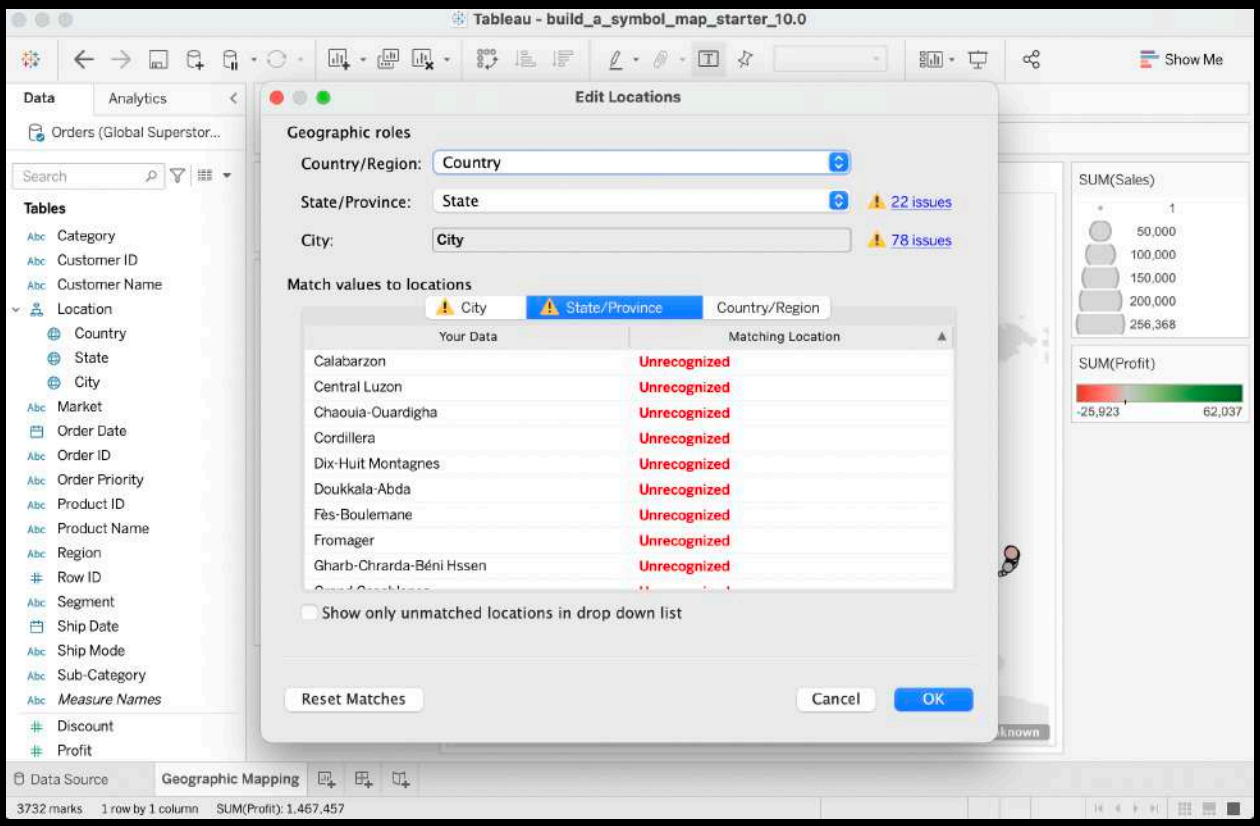


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Abc Category
Abc Customer ID
Abc Customer Name
Location
Country
State
City
Abc Market
Order Date
Abc Order ID
Abc Order Priority
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
Abc Sub-Category
Abc Measure Names
Discount
Profit
Edit Locations
Geographic roles
Country/Region: Country
State/Province: State
22 issues
City: City
78 issues
Match values to locations
City
State/Province
Country/Region
Your Data
Matching Location
Calabarzon Unrecognized
Central Luzon Unrecognized
Chaouia-Ouardigha Unrecognized
Cordillera Unrecognized
Dix-Huit Montagnes Unrecognized
Doukkala-Abda Unrecognized
Fès-Boulemane Unrecognized
Fromager Unrecognized
Gharb-Chrarda-Béni Hssen Unrecognized
Show only unmatched locations in drop down list
Reset Matches
Cancel
OK
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

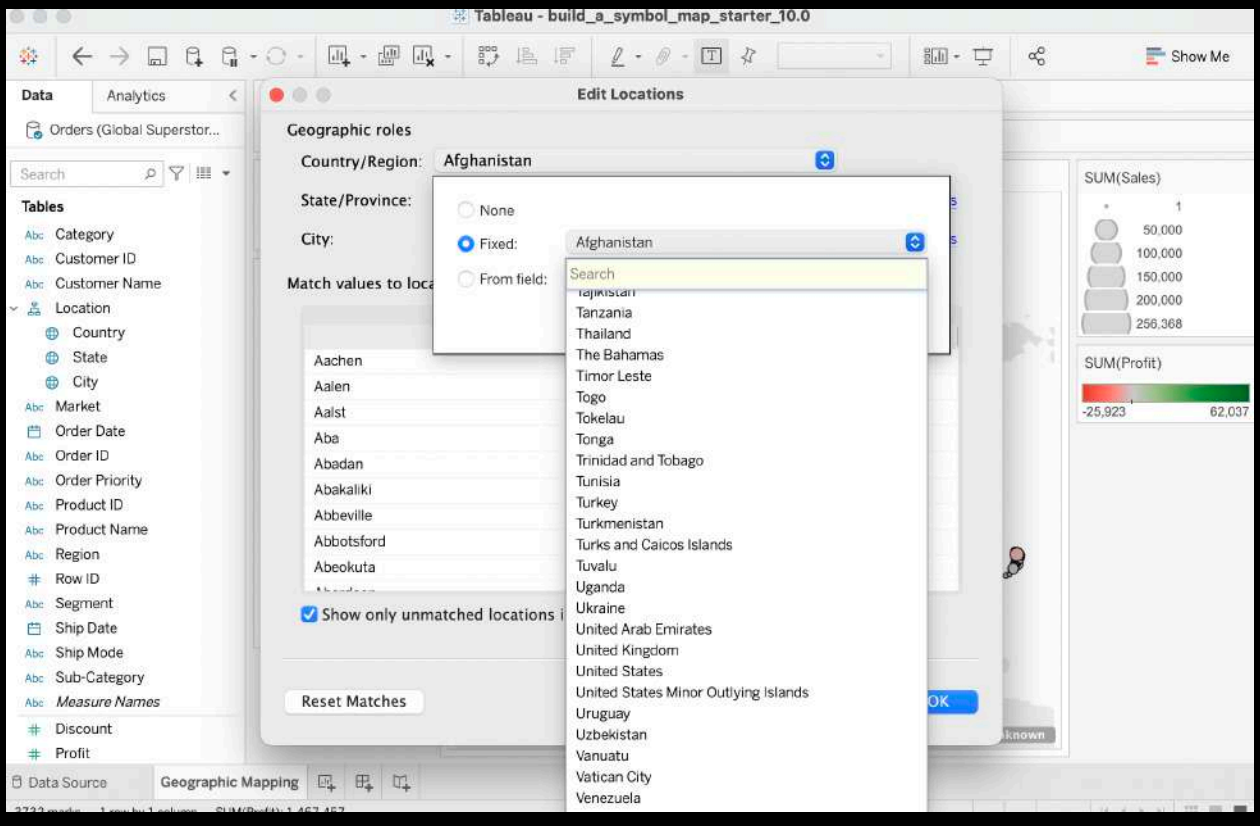


Tableau - build_a_symbol_map_starter_10.0
Show Me
Edit Locations
Geographic roles
Country/Region: Afghanistan
State/Province:
City:
None
Fixed: Afghanistan
From field:
Search
Tanzania
Thailand
The Bahamas
Timor Leste
Togo
Tokelau
Tonga
Trinidad and Tobago
Tunisia
Turkey
Turkmenistan
Turks and Caicos Islands
Tuvalu
Uganda
Ukraine
United Arab Emirates
United Kingdom
United States
United States Minor Outlying Islands
Uruguay
Uzbekistan
Vanuatu
Vatican City
Venezuela
Aachen
Aalen
Aalst
Aba
Abadan
Abakaliki
Abbeville
Abbotsford
Abeokuta
Show only unmatched locations
Reset Matches
OK
SUM(Sales)
SUM(Profit)
-25,923
62,037
Data Source
Geographic Mapping

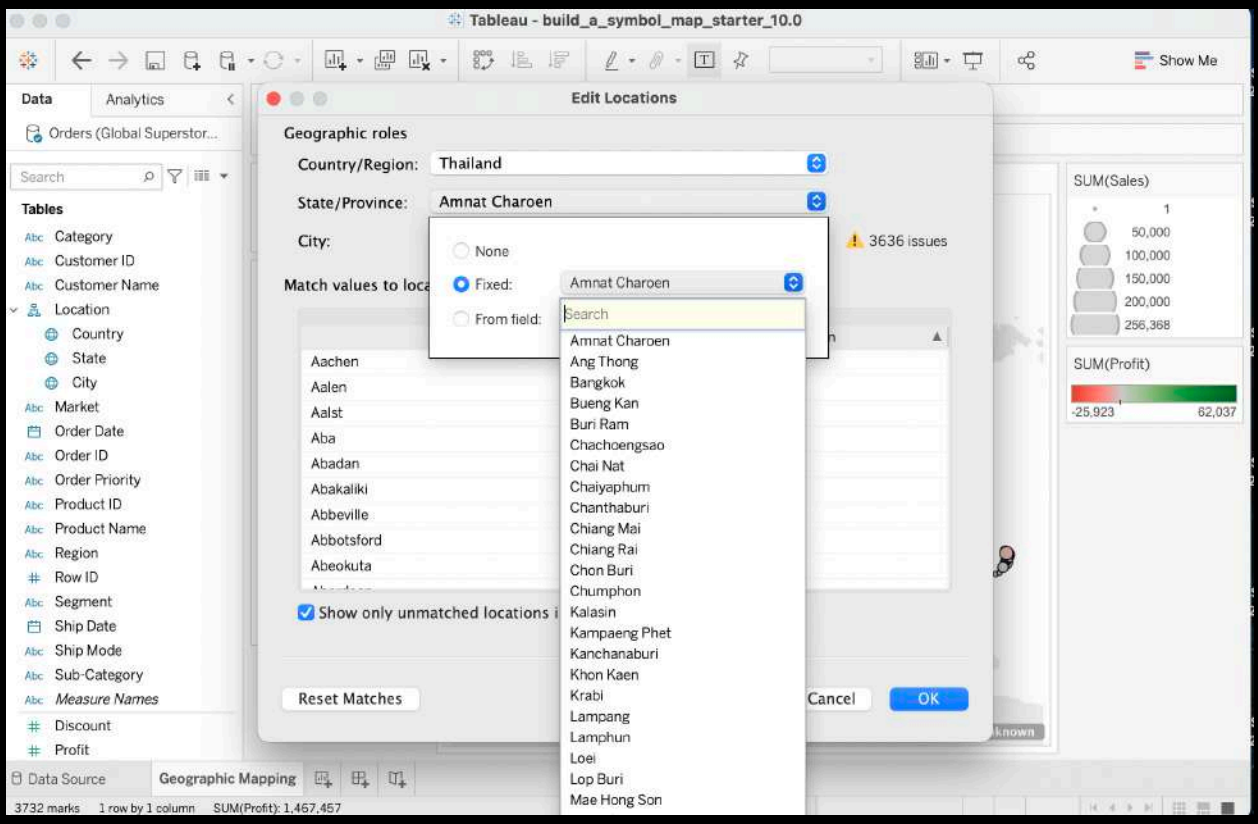


Tableau - build_a_symbol_map_starter_10.0
Edit Locations
Geographic roles
Country/Region: Thailand
State/Province: Amnat Charoen
City:
3636 issues
None
Fixed: Amnat Charoen
From field:
Search
Amnat Charoen
Ang Thong
Bangkok
Bueng Kan
Buri Ram
Chachoengsao
Chai Nat
Chaiyaphum
Chanthaburi
Chiang Mai
Chiang Rai
Chon Buri
Chumphon
Kalasin
Kampaeng Phet
Kanchanaburi
Khon Kaen
Krabi
Lampang
Lamphun
Loei
Lop Buri
Mae Hong Son
Aachen
Aalen
Aalst
Aba
Abadan
Abakaliki
Abbeville
Abbotsford
Abeokuta
Show only unmatched locations
Reset Matches
Cancel
OK
Data
Analytics
Orders (Global Superstor...
Tables
Category
Customer ID
Customer Name
Location
Country
State
City
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Measure Names
Discount
Profit
Show Me
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

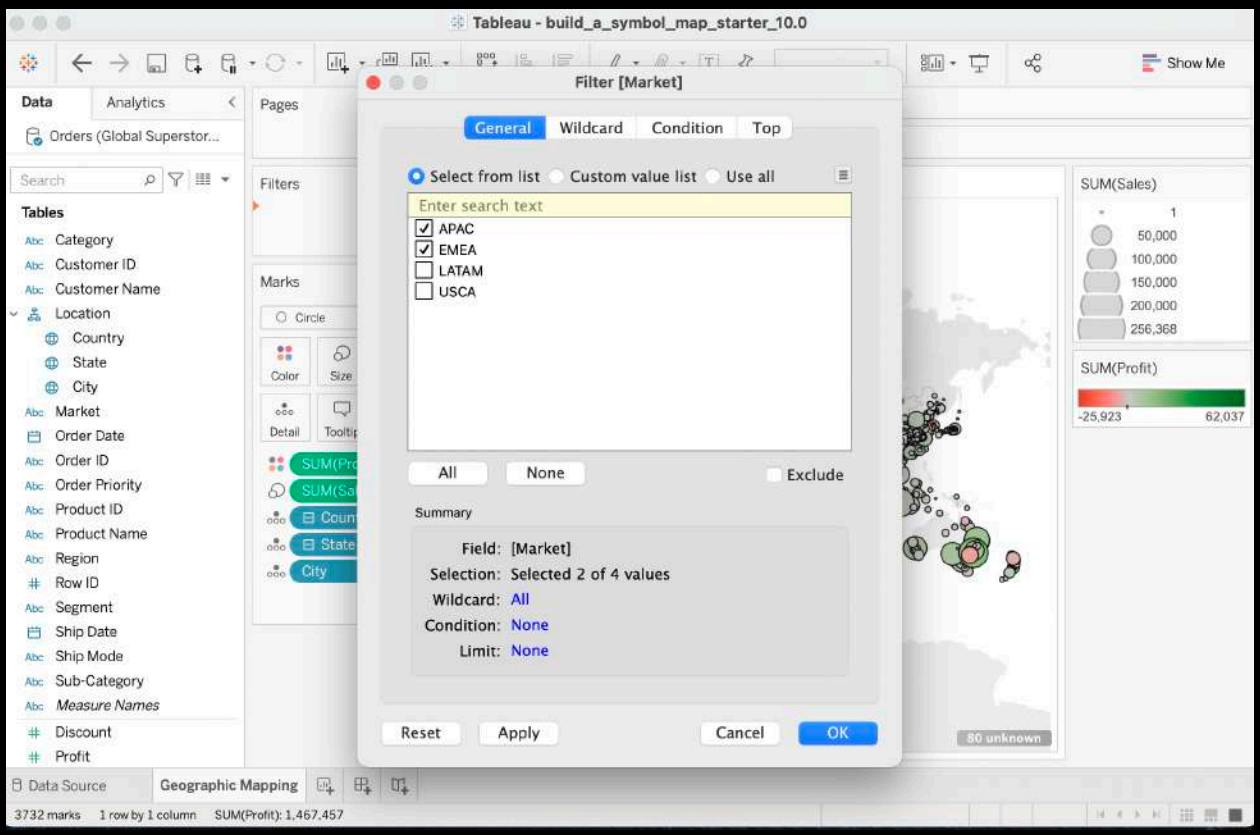


Tableau - build_a_symbol_map_starter_10.0
Filter [Market]
General
Wildcard
Condition
Top
Select from list
Custom value list
Use all
Enter search text
APAC
EMEA
LATAM
USCA
All
None
Exclude
Summary
Field: [Market]
Selection: Selected 2 of 4 values
Wildcard: All
Condition: None
Limit: None
Reset
Apply
Cancel
OK
Pages
Filters
Marks
Circle
Color
Size
Detail
Data
Analytics
Orders (Global Superstor...
Tables
Category
Customer ID
Customer Name
Location
Country
State
City
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Measure Names
Discount
Profit
Show Me
SUM(Sales)
1
50,000
100,000
150,000
200,000
256,368
SUM(Profit)
-25,923
62,037
Data Source
Geographic Mapping
3732 marks
1 row by 1 column
SUM(Profit): 1,467,457

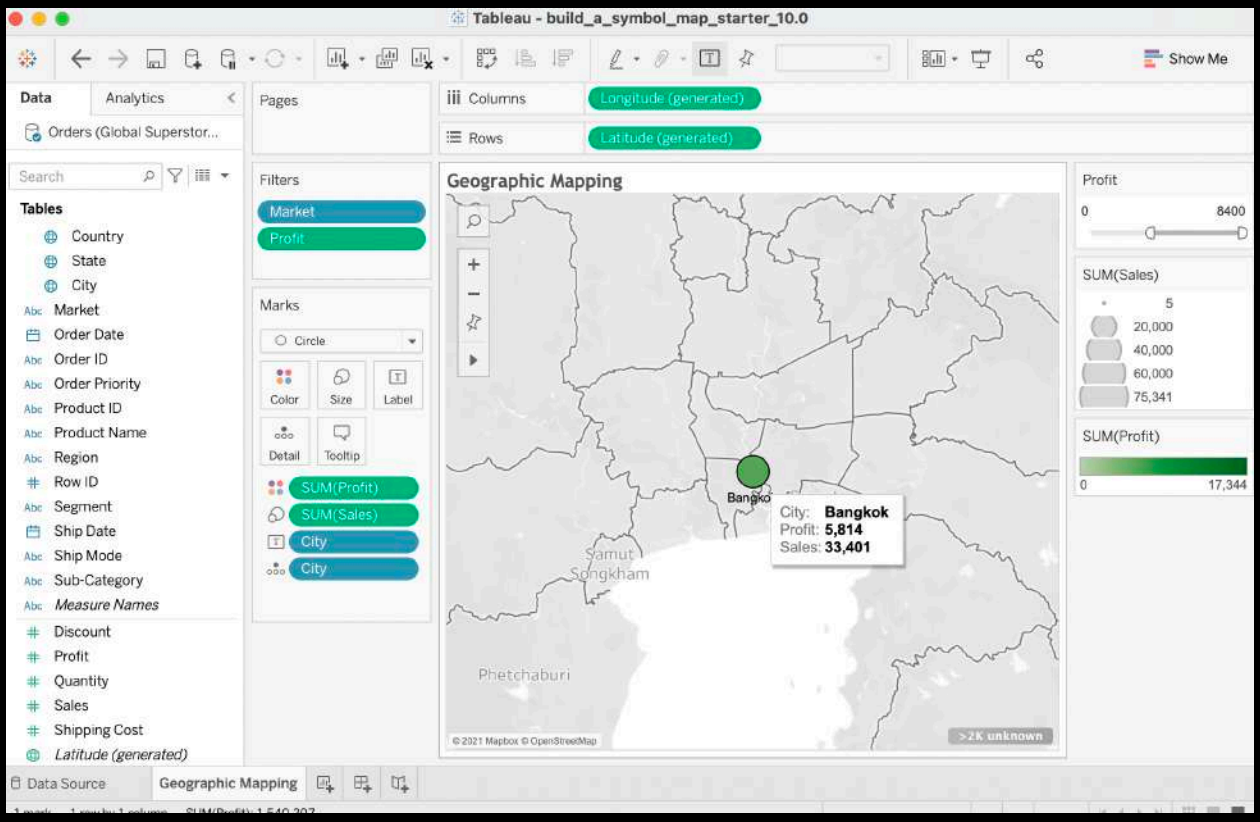


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Country
State
City
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Columns
Longitude (generated)
Rows
Latitude (generated)
Filters
Market
Profit
Marks
Circle
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Sales)
City
City
Geographic Mapping
Bangkok
City: Bangkok
Profit: 5,814
Sales: 33,401
Samut Songkham
Phetchaburi
© 2021 Mapbox © OpenStreetMap
>2K unknown
Profit
0
8400
SUM(Sales)
5
20,000
40,000
60,000
75,341
SUM(Profit)
0
17,344
Data Source
Geographic Mapping

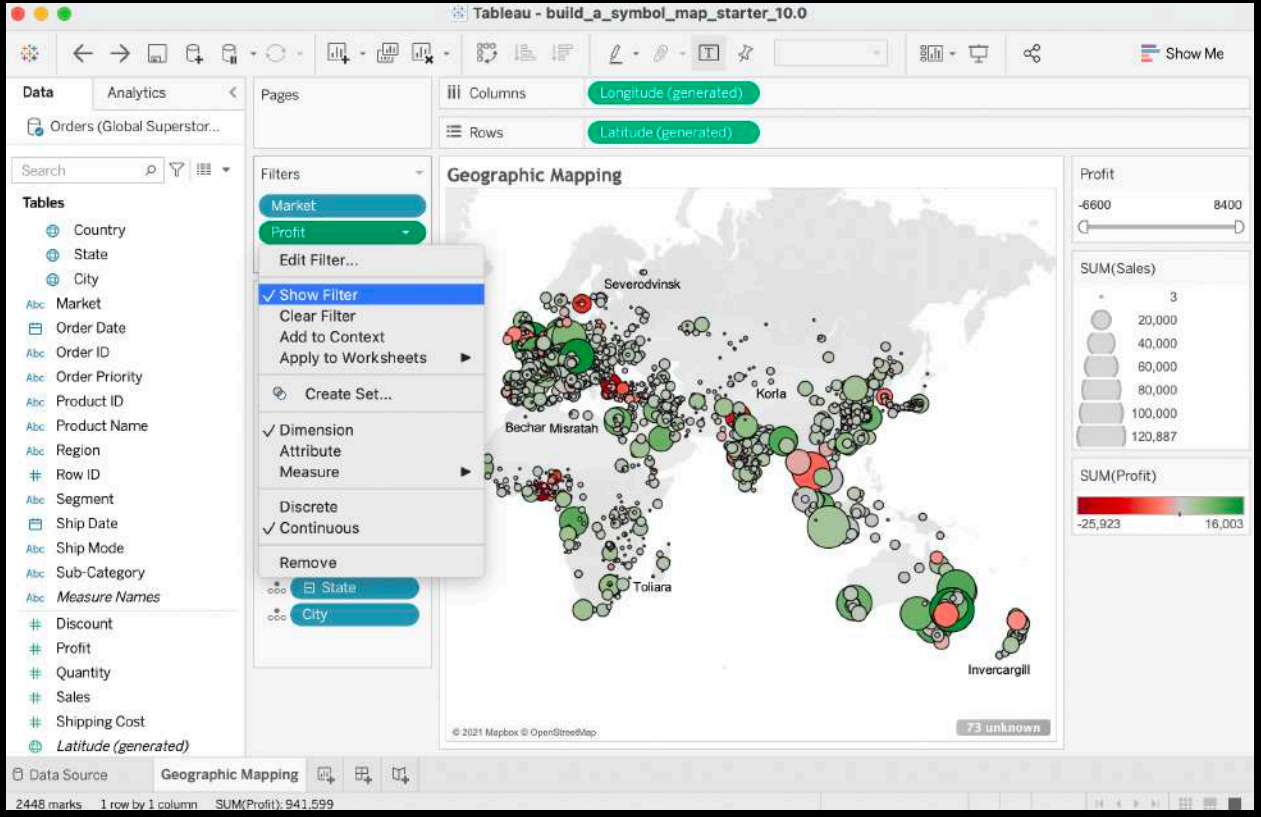


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Country
State
City
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Columns
Longitude (generated)
Rows
Latitude (generated)
Filters
Market
Profit
Edit Filter...
Show Filter
Clear Filter
Add to Context
Apply to Worksheets
Create Set...
Dimension
Attribute
Measure
Discrete
Continuous
Remove
State
City
Geographic Mapping
Severodvinsk
Korla
Bechar Misratah
Toliara
Invercargill
© 2021 Mapbox © OpenStreetMap
73 unknown
Profit
-6600
8400
SUM(Sales)
3
20,000
40,000
60,000
80,000
100,000
120,887
SUM(Profit)
-25,923
16,003
Data Source
Geographic Mapping
2448 marks
1 row by 1 column
SUM(Profit): 941,599

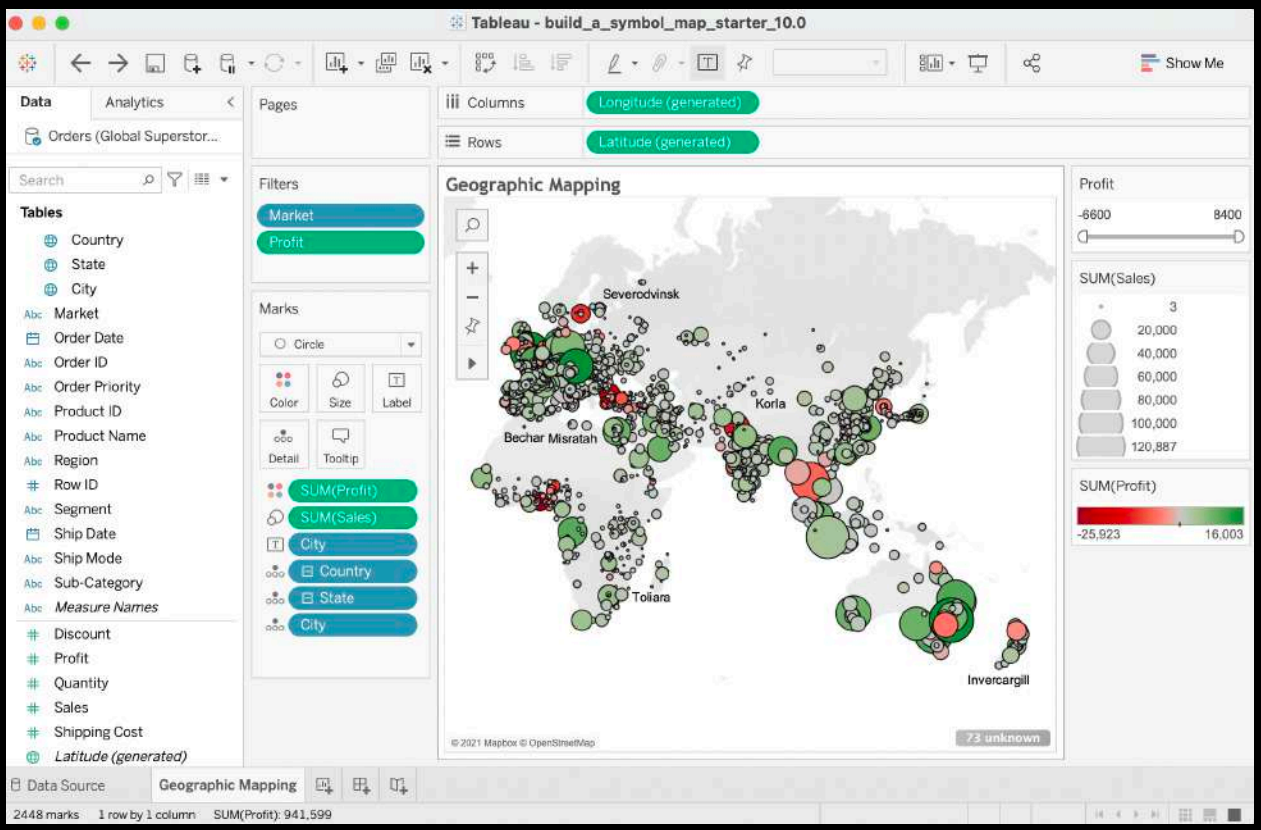


Tableau - build_a_symbol_map_starter_10.0
Show Me
Data
Analytics
Orders (Global Superstor...
Search
Tables
Country
State
City
Market
Order Date
Order ID
Order Priority
Product ID
Product Name
Region
Row ID
Segment
Ship Date
Ship Mode
Sub-Category
Measure Names
Discount
Profit
Quantity
Sales
Shipping Cost
Latitude (generated)
Pages
Columns
Longitude (generated)
Rows
Latitude (generated)
Filters
Market
Profit
Marks
Circle
Color
Size
Label
Detail
Tooltip
SUM(Profit)
SUM(Sales)
City
Country
State
City
Geographic Mapping
Severodvinsk
Korla
Bechar Misratah
Toliara
Invercargill
© 2021 Mapbox © OpenStreetMap
73 unknown
Profit
-6600
8400
SUM(Sales)
3
20,000
40,000
60,000
80,000
100,000
120,887
SUM(Profit)
-25,923
16,003
Data Source
Geographic Mapping
2448 marks
1 row by 1 column
SUM(Profit): 941,599