Report Implementation(tableau)
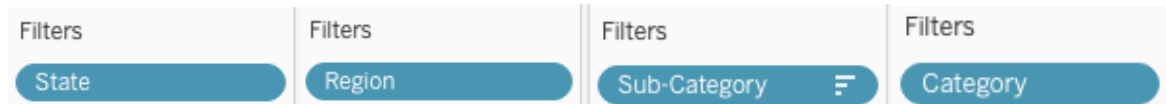
1. **Overall Dashboard**
   - **Users can select multiple regions, states and categories to compare sales or sales**
     Put state into filters in 'sales/profit by state' sheet
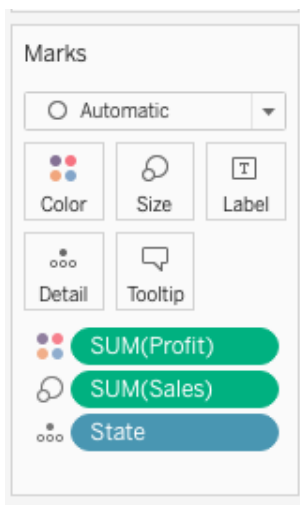   Put region into filters in 'sales/profit by region' sheet
     Put sub-category into filters in 'sales/profit by subcategory' sheet
     Put category into filters in 'sales/profit by category' sheet

   - **Users can compare the sales and profit at the same time**
     Put profit into color and sales into size
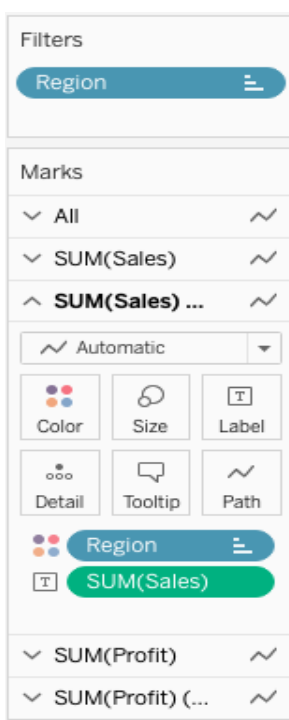

   - **Users can see the sales and profit of total and different regions**
     Put sales and profit twice in Rows
     Change order-date into continuous year
     Put region into color for the second sum(sales) and sum(profit)
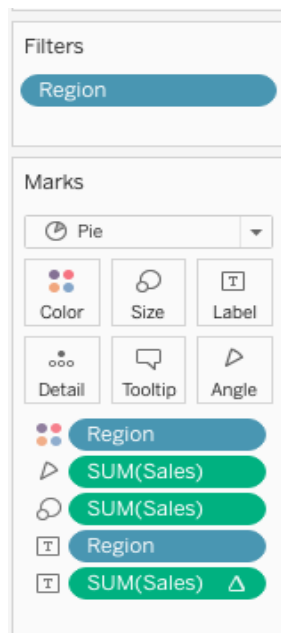

2. Sales Dashboard

- **Users can see the sales and percent of different regions**
  Put region into filters and color, label
  Put sales intp Angle, size and label
  Click sum(sales) in label, choose Quick Table Calculation -> percent of Total

  Filters
  | Region |

  Marks
  Pie
  Color Size Label
  Detail Tooltip Angle
  Region
  SUM(Sales)
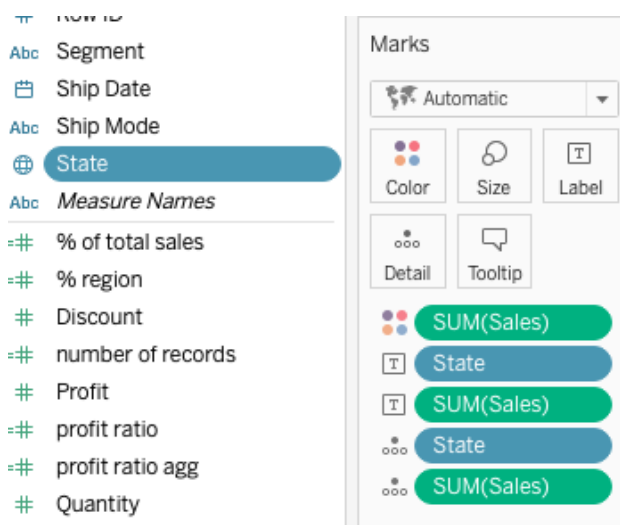 SUM(Sales)
  Region
  SUM(Sales)

- **Users can see a geographic figure of sales of different state**
  Double click State
  Put State into label and Detail
  Put sales into color, label and detail

  Row ID
  Abc Segment
  Ship Date
  Abc Ship Mode
  State
  Abc Measure Names
  # % of total sales
  # % region
  # Discount
  # number of records
  # Profit
  # profit ratio
  # profit ratio agg
  # Quantity

  Marks
  Automatic
  Color Size Label
  Detail Tooltip
  SUM(Sales)
  State
  SUM(Sales)
  State
  SUM(Sales)

- **Users can see sales of different sub-categories**
  Put sub-category into color

  Marks
  Automatic
  Color Size Label
  Detail Tooltip
  Sub-Category
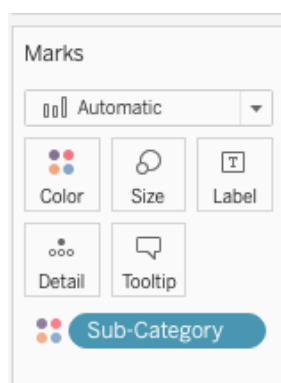
- **Users can see select N of top N customers**
  In addition, users can select to only show top N customers or all customers
  Create a parameter: top N customer, and click show parameter

Create a set on 'customer name' using top N customer parameter

Put the customer Name set into rows and filters

3. **Profit Dashboard**
   - **Users can see the profit and percent of different regions**
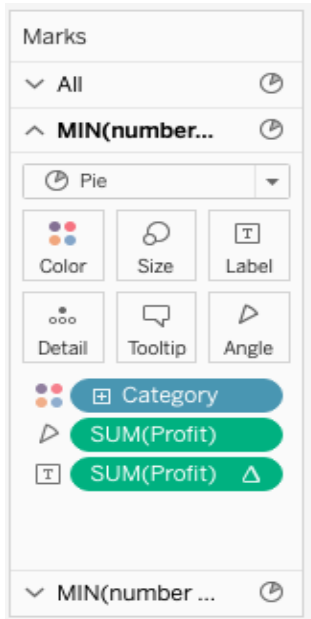   Create a calculate field 'number of records'

Put region into Columns
Put 'number of records' twice into Rows and choose Min instead of Sum

Put category into color and profit into angle and label for the first Min(number of records)
Click sum(profit) in Label and choose Quick Table Calculation -> percent of Total
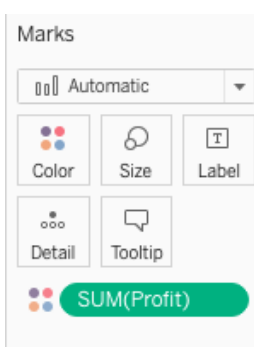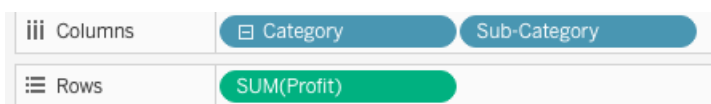

Click color icon to change it into white
Click size icon to change the size of the pie
Put profit into Angle and label
Put region into label
Click Label icon to align text in the middle
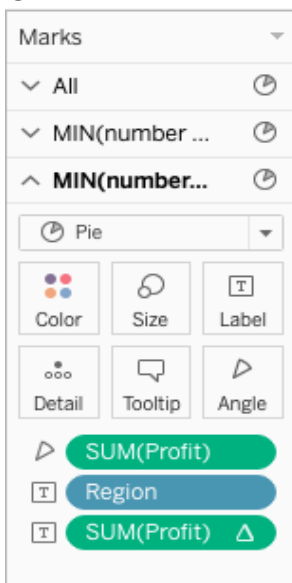
- **Users can see the positive and negative profit**
  Put category and subcategory into Columns
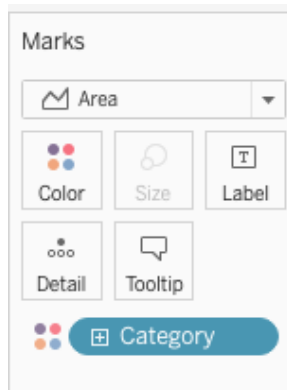 Put profit into Rows and marks -> color

- **Users can see the accumulated profit of different categories**
  Put order-date into Columns and change it to continuous year
  Put profit into Rows
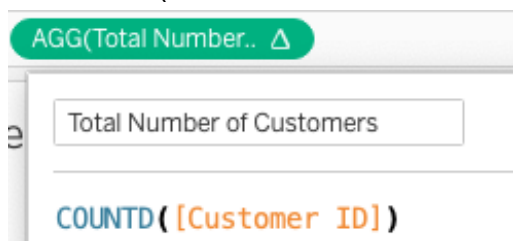 Put category into color and change it to Area

- **Users can identify if increasing profit is mainly caused by existing or new customer**
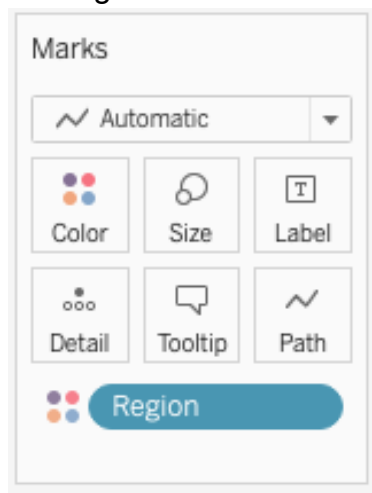 Put order-date into Columns and change it to continuous day
  Create a calculated field 'Total Number of Customers' and then put into Rows
  Click AGG(total number of customers) to choose Quick Table Calculation -> running Total

  Put region into color

  Create a calculated filed ' new or existing' and put it into filters