



MENTORNESS

INSIGHTFUL SALES ANALYSIS USING TABLEAU

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TASK OVERVIEW

Layout Consideration

- Container in Tableau are layout components used to organize and arrange objects in dashboards.

Interactive Design

- In order to add interactive designs we use Filters, Sort, Action, Legends etc.

Optimization

- Consolidate data from multiple sources into a single format.

Basic terms in Tableau

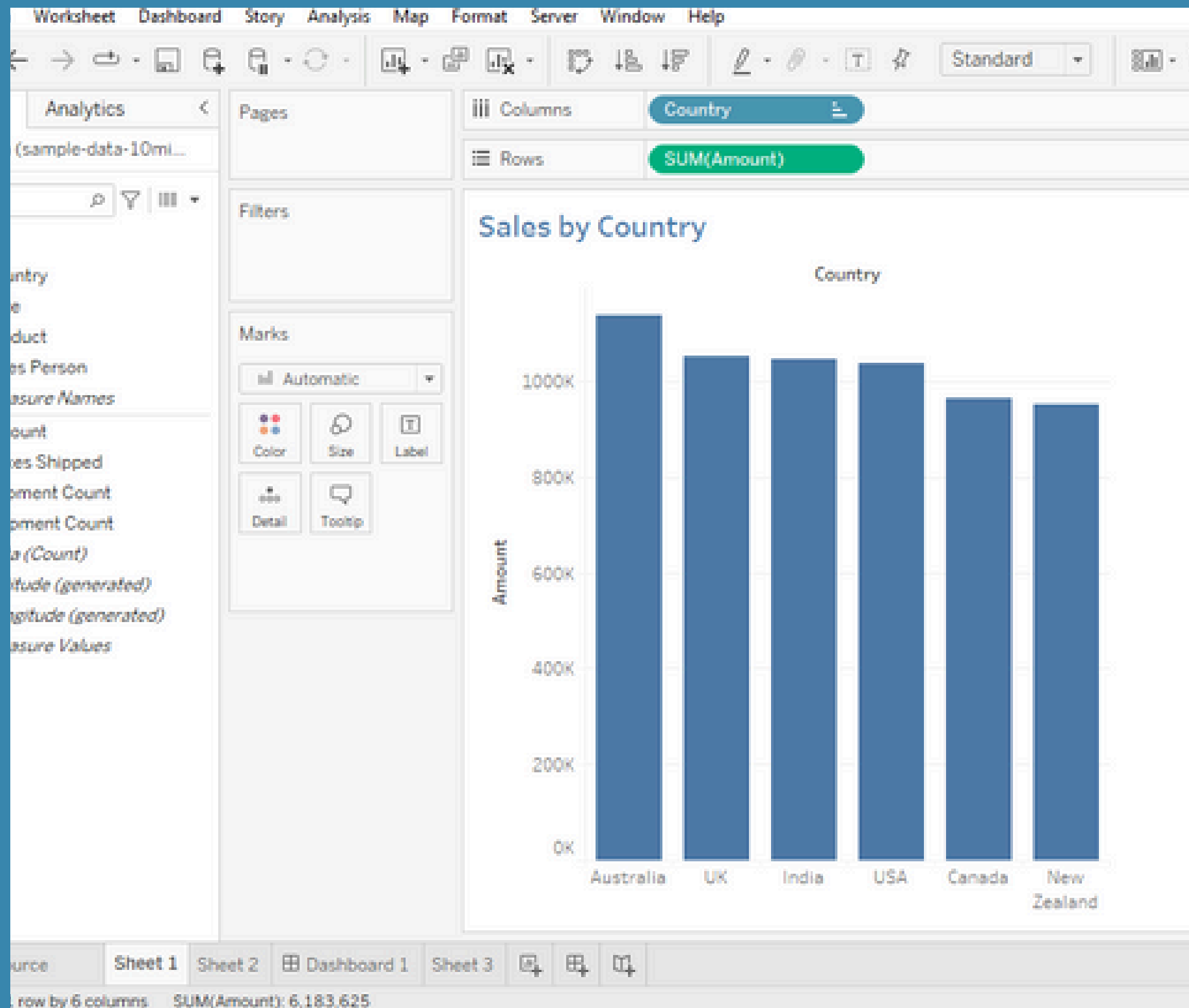
- ***Dimension*** – Dimension contains qualitative values such as names, dates and geographical data.
- ***Measures*** – Measures Contains numeric or quantitative values such as sales, profit etc.
- ***Calculated Fields*** – Calculated fields are custom fields created by users in Tableau by writing formulas or expressions.
- ***Parameters*** – Parameters in Tableau allow users to define dynamic values that can be used to control various aspects of visualization.
- ***Tiled Layout*** – Tiled layout arranges objects in a dashboard where each object occupies a specific cell within the grid.
- ***Floating Layout*** – floating layout allows objects in a dashboard to be freely positioned and layered on top of each other.
- ***Discrete*** – Discrete data consists of distinct, separate values that are typically categorical or qualitative in nature.
- ***Continuous*** – Continuous data represents a range or continuum of values that can be measured along a scale.

Sample Data

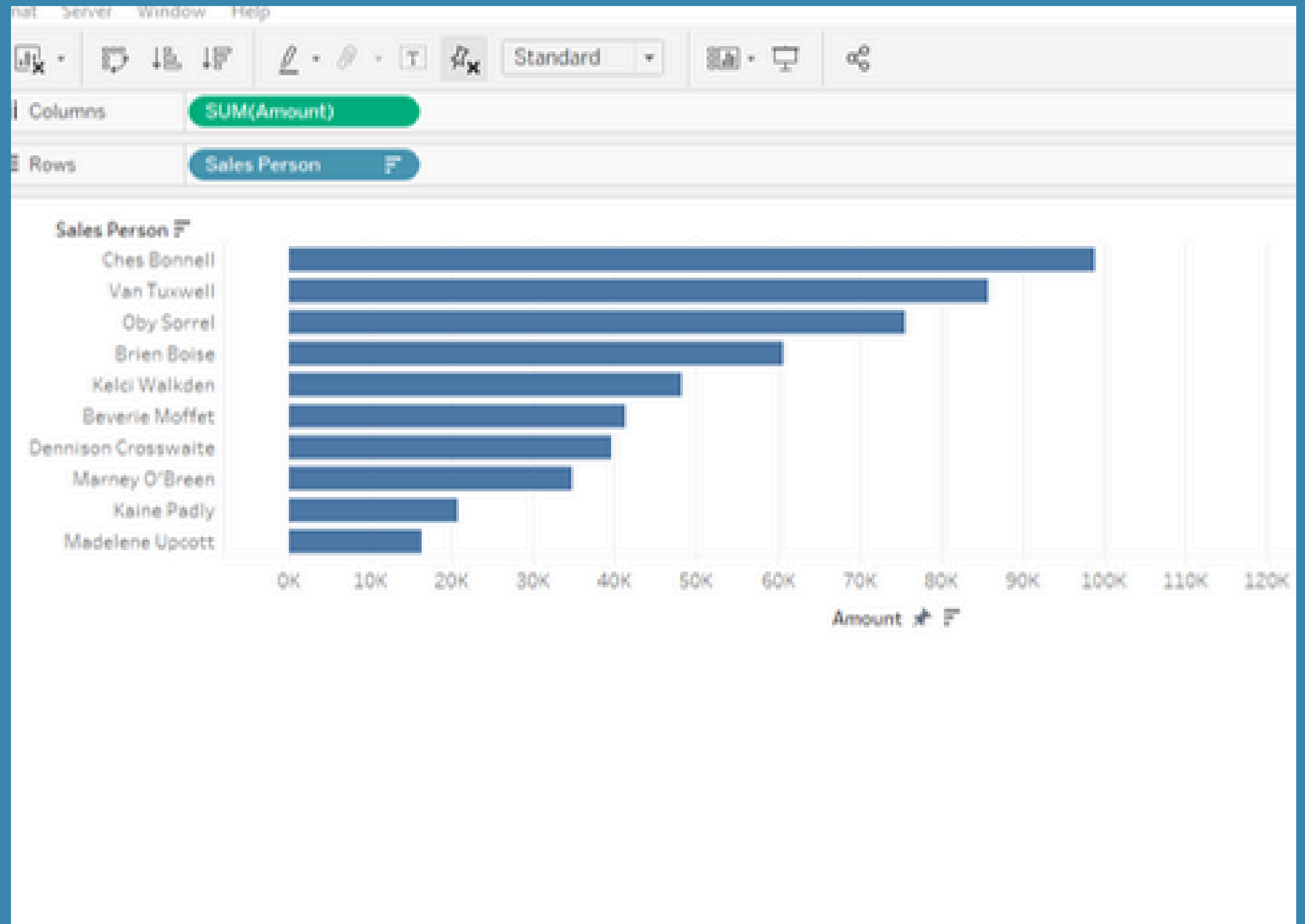
- From the given sample data we will understand the sales pattern.
- And who are the Top 10 sales Persons.

	A	B	C	D	E	
1	Sales Person	Country	Product	Date	Amount	Boxes
2	Jehu Rudeforth	UK	Mint Chip Choco	04-Jan-22	\$5,320	
3	Van Tuxwell	India	85% Dark Bars	01-Aug-22	\$7,896	
4	Gigi Bohling	India	Peanut Butter Cubes	07-Jul-22	\$4,501	
5	Jan Morforth	Australia	Peanut Butter Cubes	27-Apr-22	\$12,726	
6	Jehu Rudeforth	UK	Peanut Butter Cubes	24-Feb-22	\$13,685	
7	Van Tuxwell	India	Smooth Sliky Salty	06-Jun-22	\$5,376	
8	Oby Sorrel	UK	99% Dark & Pure	25-Jan-22	\$13,685	
9	Gunar Cockshoot	Australia	After Nines	24-Mar-22	\$3,080	
10	Jehu Rudeforth	New Zealand	50% Dark Bites	20-Apr-22	\$3,990	
11	Brien Boise	Australia	99% Dark & Pure	04-Jul-22	\$2,835	
12	Rafaelita Blaksland	UK	Smooth Sliky Salty	13-Jan-22	\$4,704	
13	Barr Faughny	USA	Orange Choco	10-Mar-22	\$3,703	
14	Mallorie Waber	Canada	Eclairs	13-Jan-22	\$1,442	
15	Karlen McCaffrey	New Zealand	Drinking Coco	28-Jul-22	\$168	
16	Marney O'Brien	New Zealand	Peanut Butter Cubes	03-Aug-22	\$8,379	
17	Rouaria Merriford	Australia	Organic Choco Caramel	26-Jan-22	\$6,790	

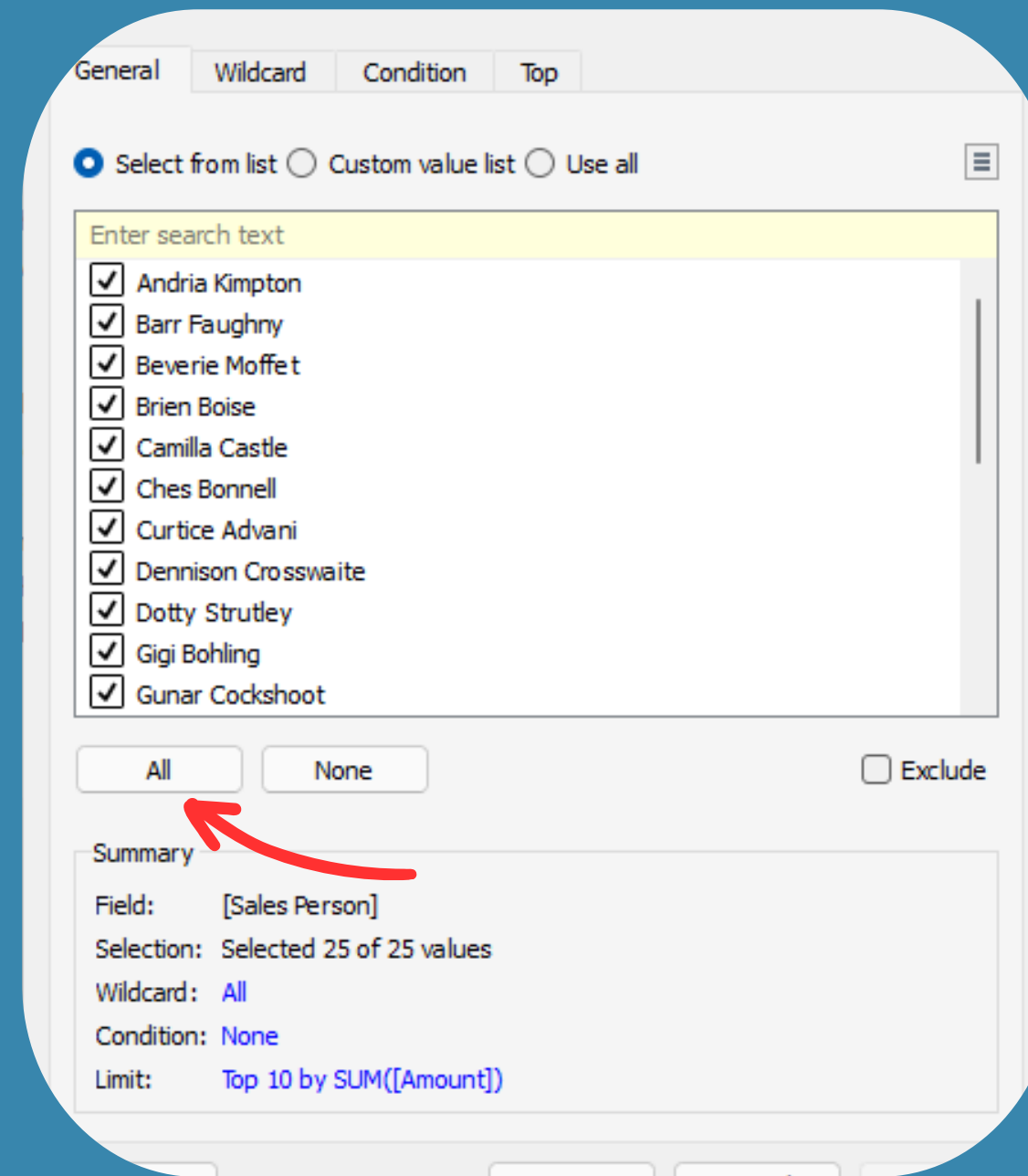
Sales by Country



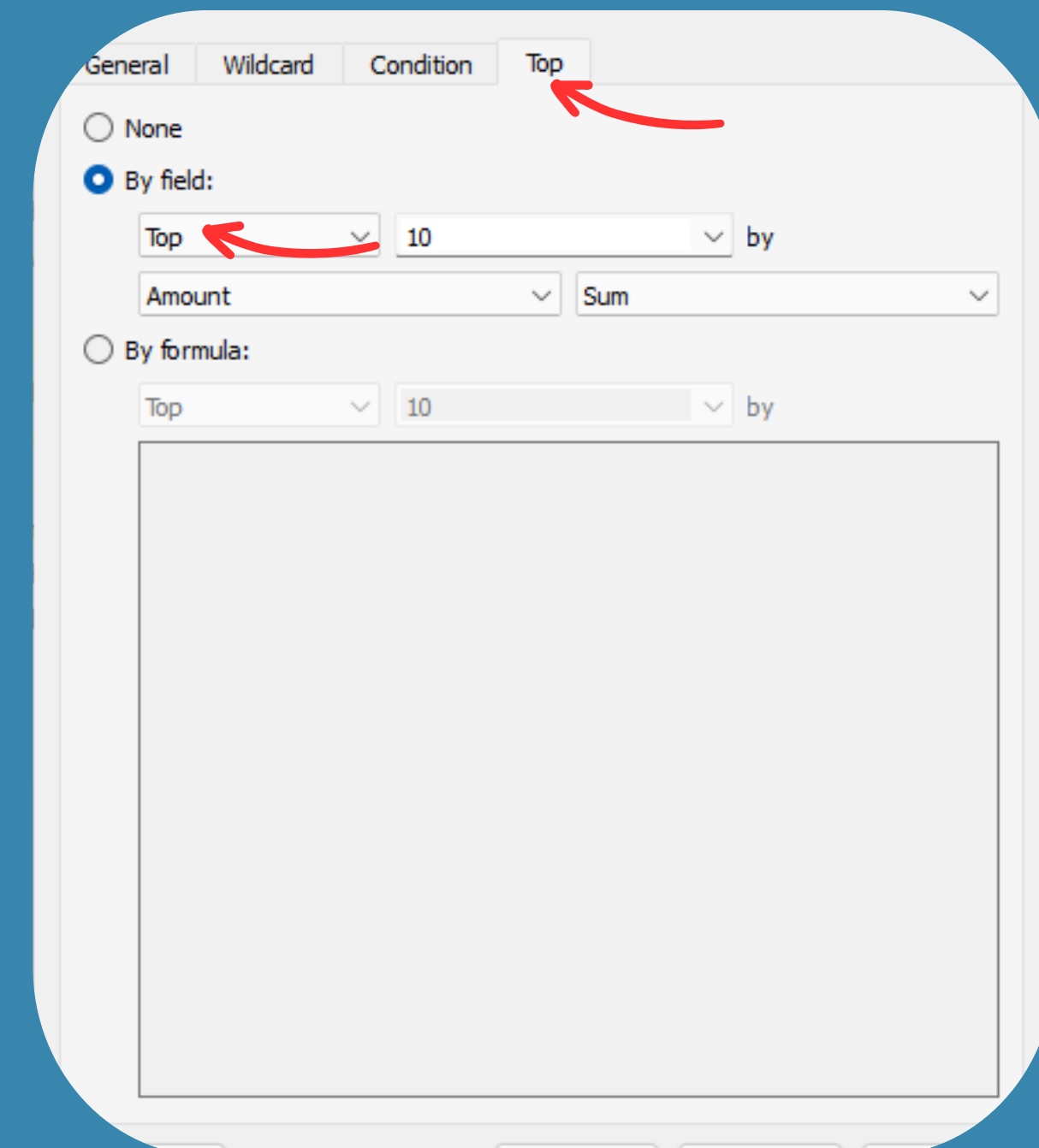
Top 10 Sales Persons



How to edit the Filter?



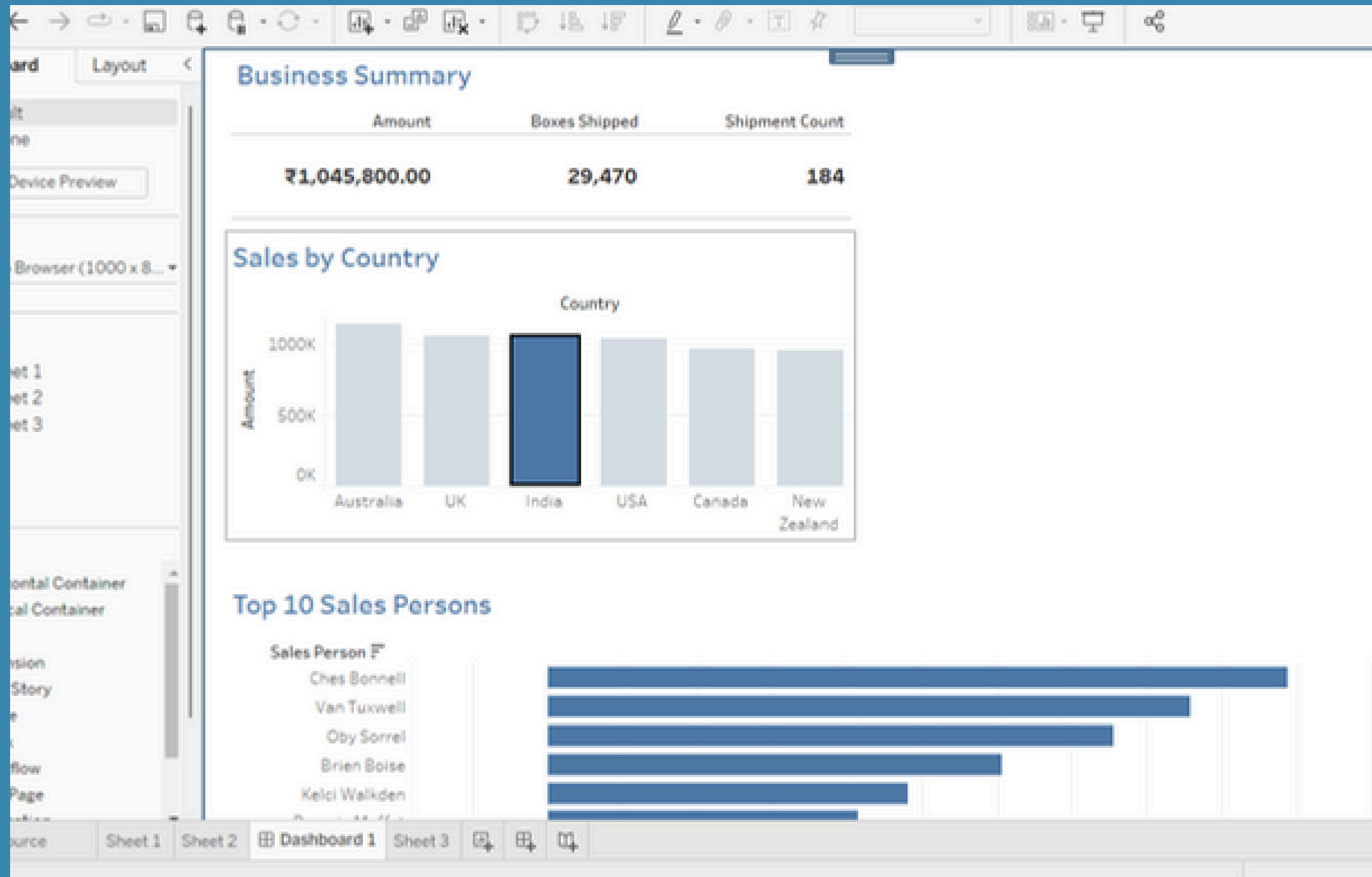
- Click on filter then right click and click on edit filter.



- After that Click on select All option and go top/bottom as per given condition.
- Then select By field option and set the range after that click ok it will display top 10 people.

Dashboard View

- Drag & Drop sheets into Dashboard.
- Setup to floating behaviour.
- For selecting Particular data:
 1. Click on dropdown.
 2. Then, Click on use as filter.



Calculate Fields

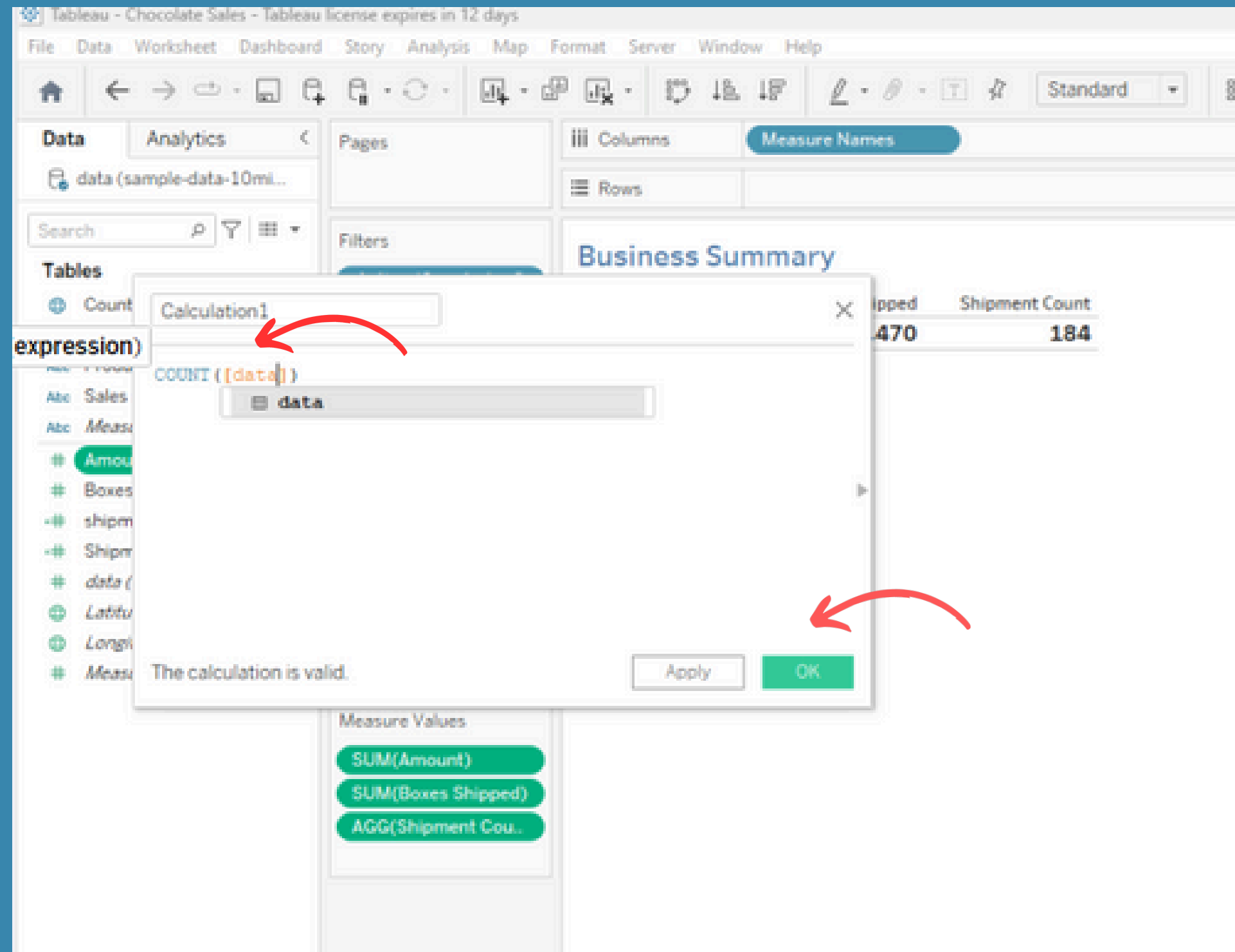
- Click on dropdown in Amount option.
- After that click on create.
- Then finally, click calculated field.

The screenshot shows the Tableau interface with the 'Data' pane on the left. The 'Amount' field is highlighted in green, and a red arrow points to its dropdown menu. The 'Create' option is selected, and a red arrow points to the 'Calculated Field...' option in the submenu. The 'Business Summary' table is visible on the right.

Amount	Boxes Shipped	Shipment Count
₹1,045,800.00	29,470	184

Total Amount

- After that use Aggregate function 'COUNT'.
- Expression: COUNT([data]).
- Click on ok it will display the total amount.



The screenshot shows the 'Business Summary' dashboard. The 'Amount' column is highlighted with a red box, displaying the value '₹1,045,800.00'. The 'Boxes Shipped' column displays '29,470' and the 'Shipment Count' column displays '184'.

Amount	Boxes Shipped	Shipment Count
₹1,045,800.00	29,470	184



CONCLUSION

- Tableau dashboards requires a thoughtful approach to layout, interactivity, and optimization for different devices.
- Incorporating interactive elements like filters and parameter controls enhances user engagement.
- Tableau dashboards not only effectively communicate data but also captivate and empower users to uncover valuable insights.

THANKYOU

For joining me on this journey of exploring Tableau dashboard design
Our knowledge and skills will continue to evolve with practice and experimentation.

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