

Certification Program in Business Analytics & Optimisation

Assignment 2

DASHBOARD CREATION IN TABLEAU



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OBJECTIVE : To create a Dashboard for the Retail Store data and aid in data visualisation

Visualisations shown in the Dashboard

1. Pivot Table Visual
2. Scorecard Visual
3. Slider Control
4. Date Range Control
5. Time Series Chart
6. Geographical Chart
7. Bar Chart
8. Pie Chart
9. Tree Map
10. Line Chart

Data used for making Dashboard is basically a retail store sales data having details like region, product category, order date, number of customer etc.

TABLEAU DASHBOARD (SALES ANALYSIS)

Sales
755.0K
⬆ 20%

Profit
85.3K
⬆ 10.5%

Quantity
9.8K
⬆ 23.9%

Total Customers
639
⬆ 3.6%

Profit Margin %
11.3%
⬇ -7.7%

Feedback
2.6K
⬆ 24.4%

Select date range

Region

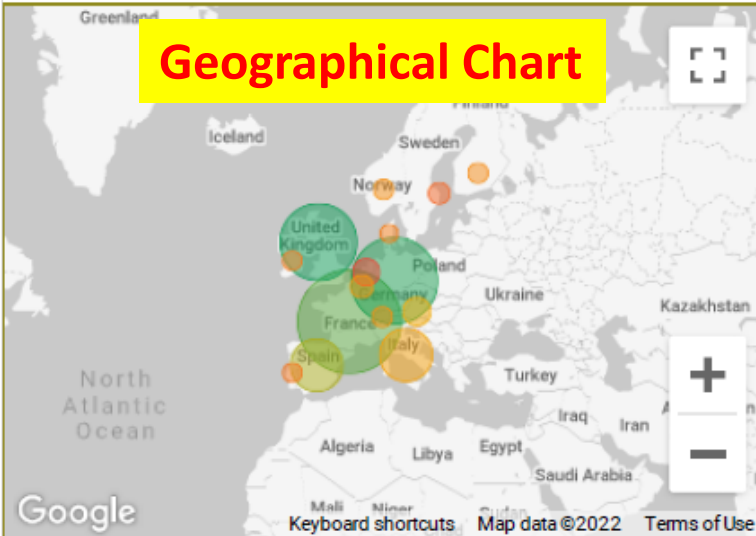
Sub-Category

Profit

Sales

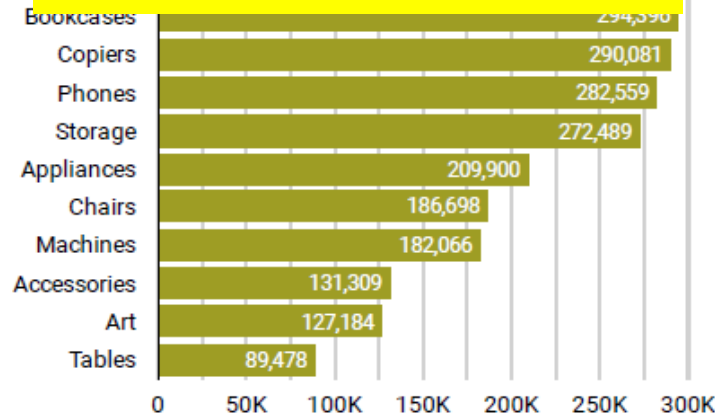
Sales Performance by Region

Geographical Chart



Category Wise Analysis

Bar Chart



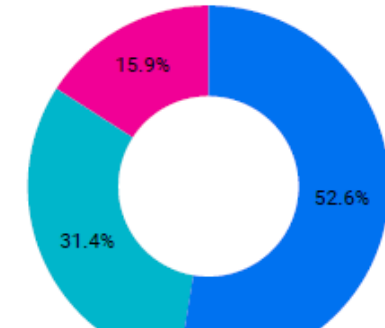
Region Wise Analysis

Region	Home Office	Corporate	Consumer
Central	216.9K	396.4K	701.9K
South	73.1K	177.7K	266.4K
North	84K	164K	268K
Grand total	374.1K	738.1K	1.2M

Pivot Table

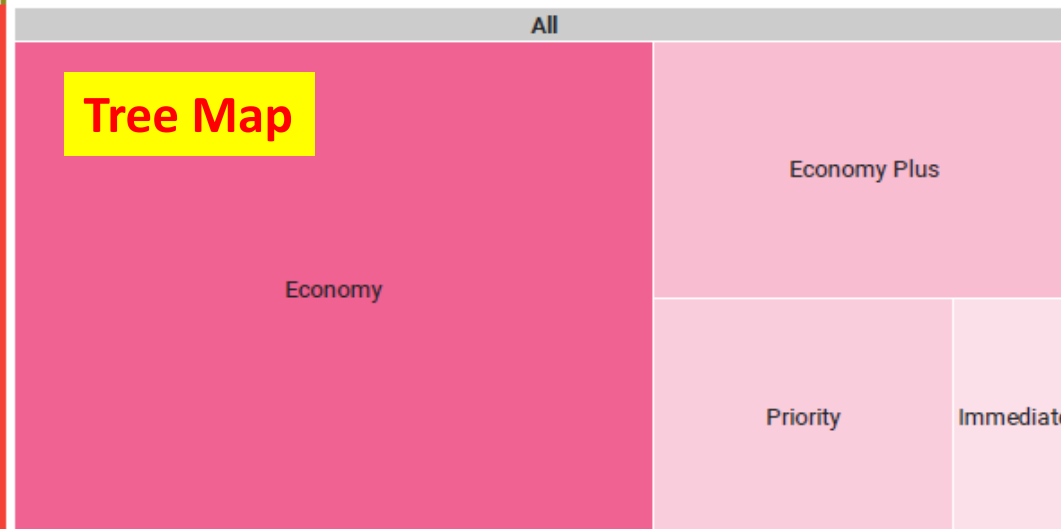
Segment Wise Analysis

● Consumer ● Corporate ● Home Of..



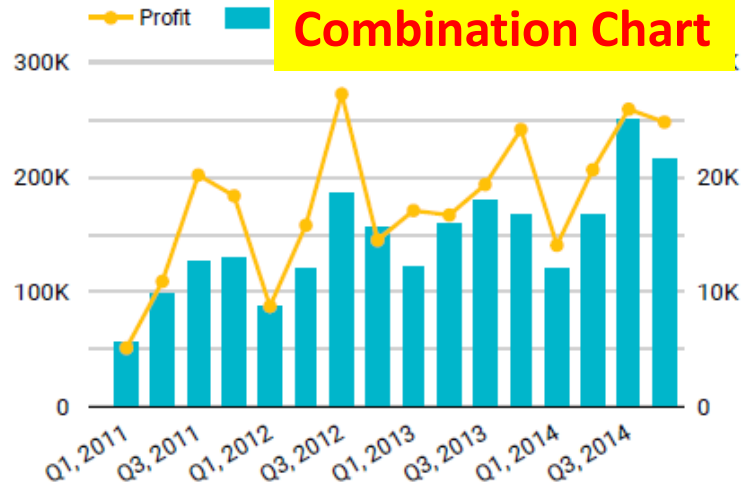
Pie Chart

Tree Map



DASHBOARD-1

Combination Chart



Details of Features used in Dashboard

TABLEAU DASHBOARD
(SALES ANALYSIS)

Sales
755.0K
± 20%

Profit
85.3K
± 10.5%

Quantity
9.8K
± 23.9%

Total Customers
639
± 3.6%

Profit Margin %
11.3%
↓ -7.7%

Feedback
2.6K
± 24.4%

Textbox showing the Title
of the Dashboard

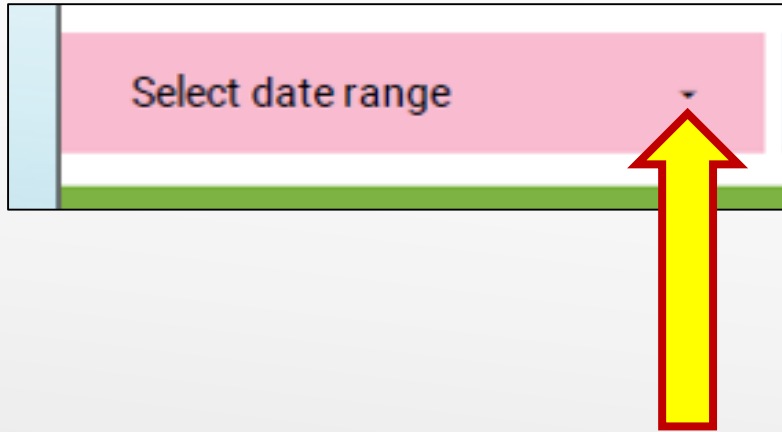
Scorecard Visual :

It gives direct comparison of the data for the current month in comparison to the previous month or quarter as required.

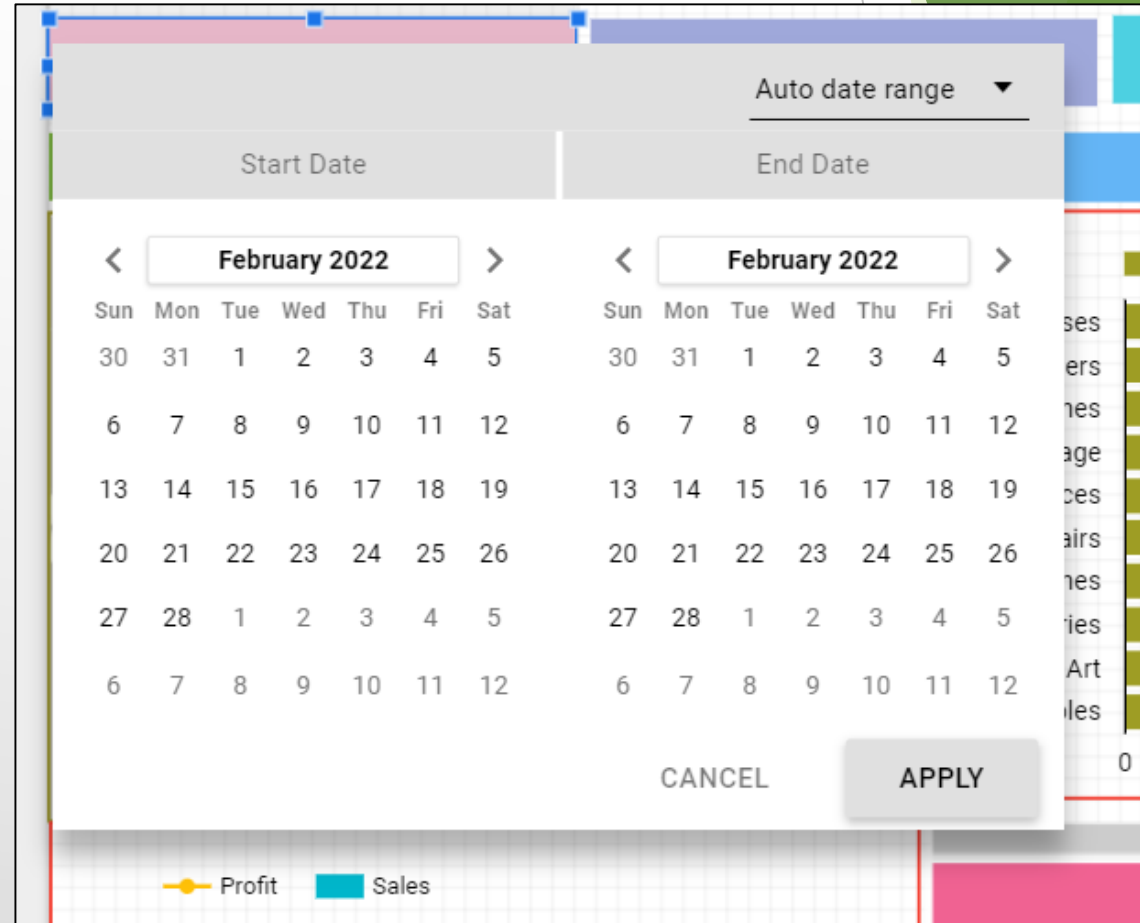
Both the absolute value & % change can be observed.

Details of Features used in Dashboard

Date Range Control



On Clicking the Date Range Control,
Start and End Date can be selected
as shown on right hand side for
filtering the data



Details of Features used in Dashboard

Category Controls



On Clicking the Category Control feature like region or sub category, further filtering of data can be achieved as shown

A screenshot of the 'Region' dropdown menu. It features a search bar at the top and a list of regions, each with a checkbox and a sales figure.

<input checked="" type="checkbox"/> Region	Sales
<input checked="" type="checkbox"/> Central	1.3M
<input checked="" type="checkbox"/> South	517.3K
<input checked="" type="checkbox"/> North	516K

A screenshot of the 'Sub-Category' dropdown menu. It features a search bar at the top and a list of sub-categories, each with a checkbox and a sales figure.

<input checked="" type="checkbox"/> Sub-Category	Sales
<input checked="" type="checkbox"/> Bookcases	294.4K
<input checked="" type="checkbox"/> Copiers	290.1K
<input checked="" type="checkbox"/> Phones	282.6K
<input checked="" type="checkbox"/> Storage	272.5K
<input checked="" type="checkbox"/> Appliances	209.9K
<input checked="" type="checkbox"/> Chairs	186.7K
<input checked="" type="checkbox"/> Machines	182.1K
<input checked="" type="checkbox"/> Accessories	131.3K
<input checked="" type="checkbox"/> Art	127.2K

1. Visualizations shown in the earlier slides can also be interlinked.
2. This will help in easier interpretation of the data based on region, sub category.
3. Thus, sales, profit, number of customer and other details can be obtained on the click of a button.

TABLEAU DASHBOARD (SALES ANALYSIS)

Sales
414.9K
↑ 21%

Profit
48.6K
↑ 13.1%

Quantity
5.2K
↑ 15.4%

Total Customers
471
↑ 9.8%

Profit Margin %
11.7%
↓ -6.6%

Feedback
1.4K
↑ 18.4%

Select date range

Region: Central

(1)

Sales Performance by Region

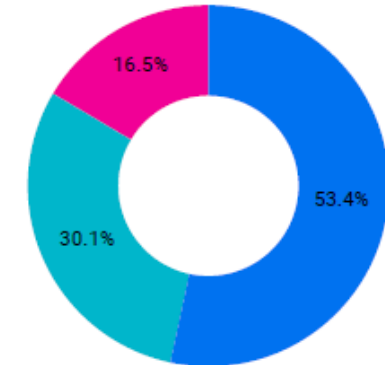
Category Wise Analysis

Region Wise Analysis

Region	Home Office	Corporate	Consumer
Central	216.9K	396.4K	701.9K
Grand total	216.9K	396.4K	701.9K

Segment Wise Analysis

Consumer Corporate Home Of...



Filter
Control

DASHBOARD-2

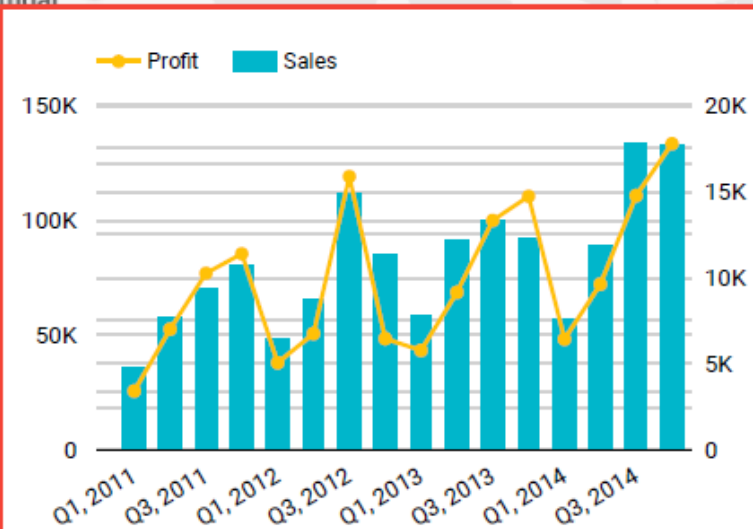
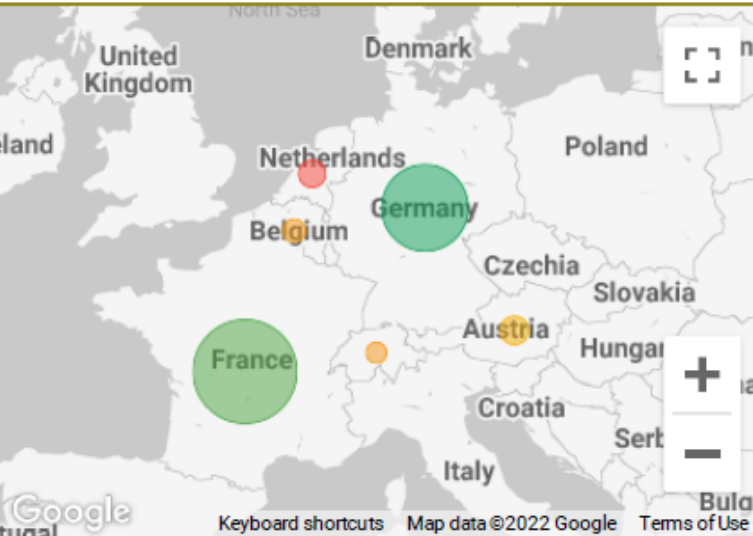
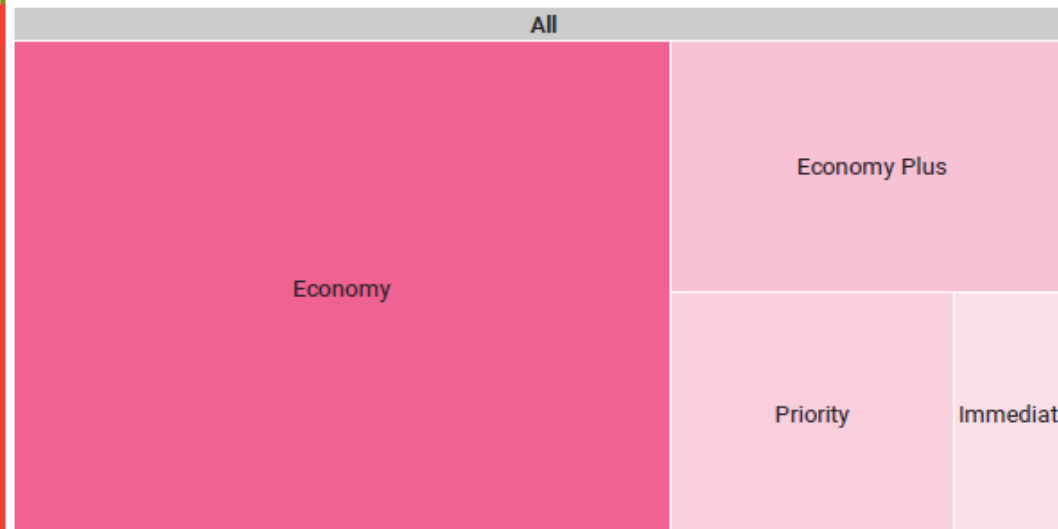
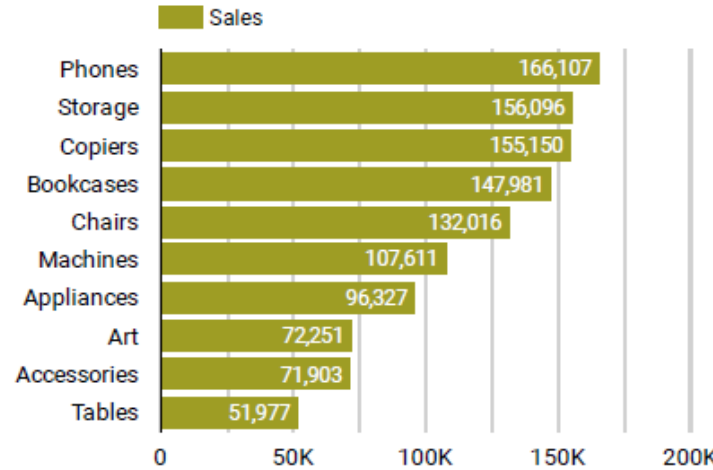


TABLEAU DASHBOARD (SALES ANALYSIS)

Sales
25.1K
⬆ 35%

Profit
1.8K
⬇ -57.0%

Quantity
173.0
⬆ 64.8%

Total Customers
36
⬆ 38.5%

Profit Margin %
7.4%
⬇ -68.2%

Feedback
45.0
⬆ 45.2%

Jan 1, 2011 - Jun 30, 20

Region: Central

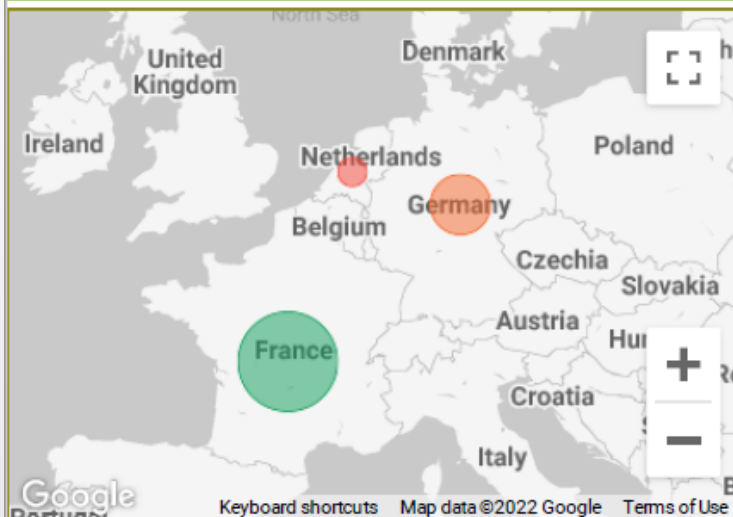
(1)

Sub-Category: Pho... (3)

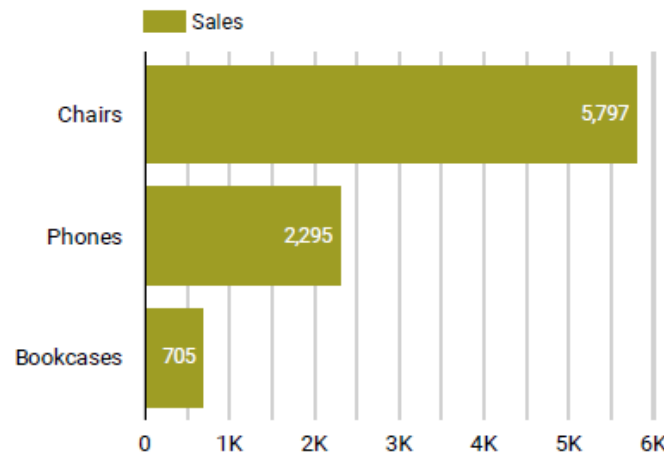
Profit

Sales

Sales Performance by Region



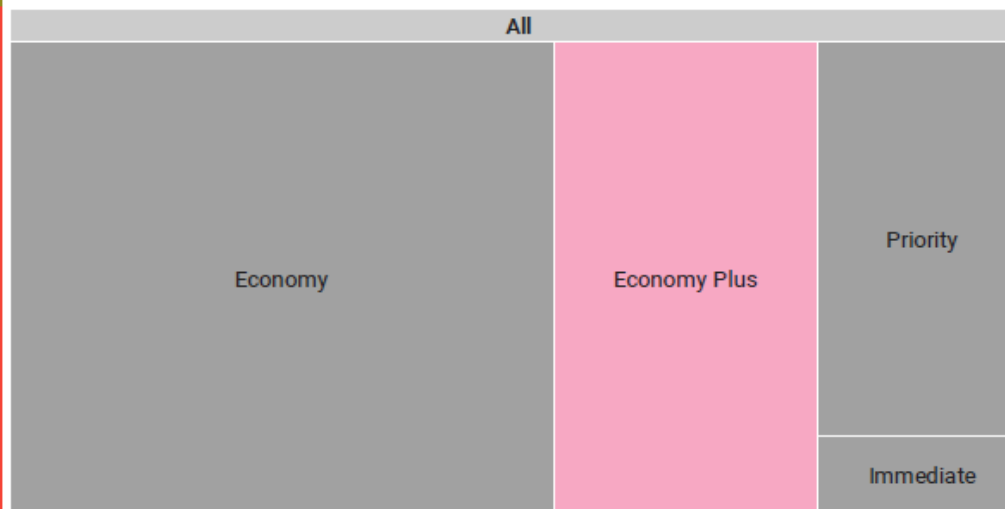
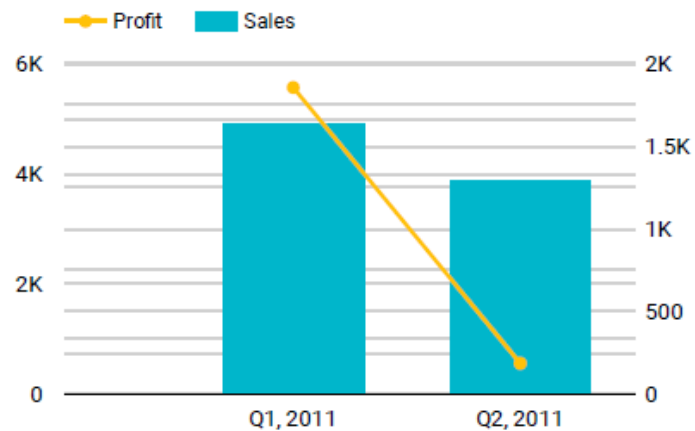
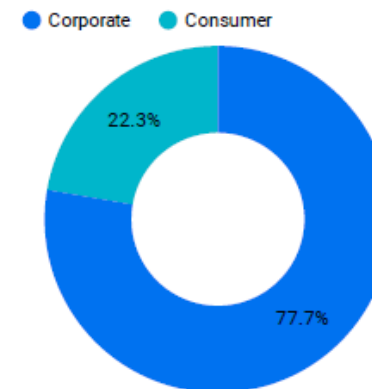
Category Wise Analysis



Region Wise Analysis

Region	Corporate	Consumer
Central	6.8K	2K
Grand total	6.8K	2K

Segment Wise Analysis



Filter
Control

DASHBOARD-3

Interpretation of the Visuals shown in Dashboards

1. **Dashboard 1** covers all the data mentioned in the excel without any filters. It shows different visualisation tools which can be played with to get the desired data in just a click of a drop down button placed near each controls.
2. In **Dashboard 2**, data has been filtered based on region and all the related visuals get updated.
3. Change in sales, profit, number of customers is clearly visible in the two dashboards.
4. In **Dashboard 3**, further filtering based on order date and product sub category has been done.
 1. Scorecard visual, specifies the change in terms of % and absolute number for sales, profit, number of customers.
 2. Pivot table shows, for the central region, how much sales has come from corporate and consumer segment.
 3. Geographical locations, highlights the location of the stores having sales for the required filters.

Conclusion from Dashboard 3 is :

- Out of chairs, phones and book cases, In Central region of France, maximum number of customers who have bought the chairs belongs to corporate segment (77.7%).
- Also, the sales of the products have decreased in Q2 of 2011, when compared with Q1 by 57%.
- This helps the management in decision making.

THANK YOU