



**Tableau Workbook Name: Superstore.twb**

Background:	An awesome sample output documentation from RapidDox		
Requested by:	Your Product Owner	Requested date:	2022-12-01
Developed by:	Your Tableau Dashboard Developer	Completed date:	2022-12-01
Audience:	Your Tableau Dashboard Consumers.		

**Summary Stats**

	Counts
Dashboards #	6
Worksheets #	21
Data Source #	3
Data Source Filters #	0
Custom Sql #	0
Fields #	33
Calculated Fields #	21
Groups #	0
Hierarchies #	2
Parameters #	6
Sets #	0

**Data Source**

Data Source alias	Data Source type	Source	Joins
Sales Target	Live	excel-direct	None
Sales Commission	Live	textscan	None
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)]

## List of Dashboards & Worksheets Used

Dashboard Name	Worksheet Name
Commission Model	QuotaAttainment
Commission Model	CommissionProjection
Commission Model	Sales
Commission Model	OTE
Customers	CustomerScatter
Customers	CustomerRank
Customers	CustomerOverview
Order Details	Product Detail Sheet
Overview	Total Sales
Overview	Sale Map
Overview	Sales by Segment
Overview	Sales by Product
Product	ProductView
Product	ProductDetails
Shipping	ShipSummary
Shipping	ShippingTrend
Shipping	DaystoShip
N/A	Forecast
N/A	Performance
N/A	Tooltip: Profit Ratio by City
N/A	What If Forecast

## Tables and Fields

Data Source	Source Database	Table Name	Field Name	Remote Field	Data Type	Used	Folder	Dimension/ Measure	Hidden
Sales Target	excel-direct	Sheet1	Category	Category	string	Yes		Measure	No
Sales Target	excel-direct	Sheet1	Order Date	Order Date	date	Yes		dimension	No
Sales Target	excel-direct	Sheet1	Segment	Segment	string	Yes		Measure	No
Sales Target	excel-direct	Sheet1	Sales Target	Sales Target	integer	Yes		Measure	No
Sales Commission	textscan	Sales Commission.csv	Order Date	Order Date	datetime	Yes		dimension	No
Sales Commission	textscan	Sales Commission.csv	Region	Region	string	Yes		Measure	No
Sales Commission	textscan	Sales Commission.csv	Sales Person	Sales Person	string	Yes		Measure	No
Sales Commission	textscan	Sales Commission.csv	Sales	Sales	integer	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Row ID	Row ID	integer	No		Measure	No
Sample - Superstore	excel-direct	Orders	Order ID	Order ID	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Order Date	Order Date	date	Yes		dimension	No
Sample - Superstore	excel-direct	Orders	Ship Date	Ship Date	date	Yes		dimension	No
Sample - Superstore	excel-direct	Orders	Ship Mode	Ship Mode	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Customer ID	Customer ID	string	No		Measure	No
Sample - Superstore	excel-direct	Orders	Customer Name	Customer Name	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Segment	Segment	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Country/Region	Country/Region	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	City	City	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	State/Province	State/Province	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Postal Code	Postal Code	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Region	Region	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Product ID	Product ID	string	No		Measure	No
Sample - Superstore	excel-direct	Orders	Category	Category	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Sub-Category	Sub-Category	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Product Name	Product Name	string	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Sales	Sales	real	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Quantity	Quantity	integer	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Discount	Discount	real	Yes		Measure	No
Sample - Superstore	excel-direct	Orders	Profit	Profit	real	Yes		Measure	No
Sample - Superstore	excel-direct	People	Regional Manager	Regional Manager	string	No		Measure	No

<b>Data Source</b>	<b>Source Database</b>	<b>Table Name</b>	<b>Field Name</b>	<b>Remote Field</b>	<b>Data Type</b>	<b>Used</b>	<b>Folder</b>	<b>Dimension/ Measure</b>	<b>Hidden</b>
Sample - Superstore	excel-direct	People	Region	Region	string	Yes		Measure	No
Sample - Superstore	excel-direct	Returns	Returned	Returned	string	No		Measure	No
Sample - Superstore	excel-direct	Returns	Order ID	Order ID	string	Yes		Measure	No

## Calculated Fields

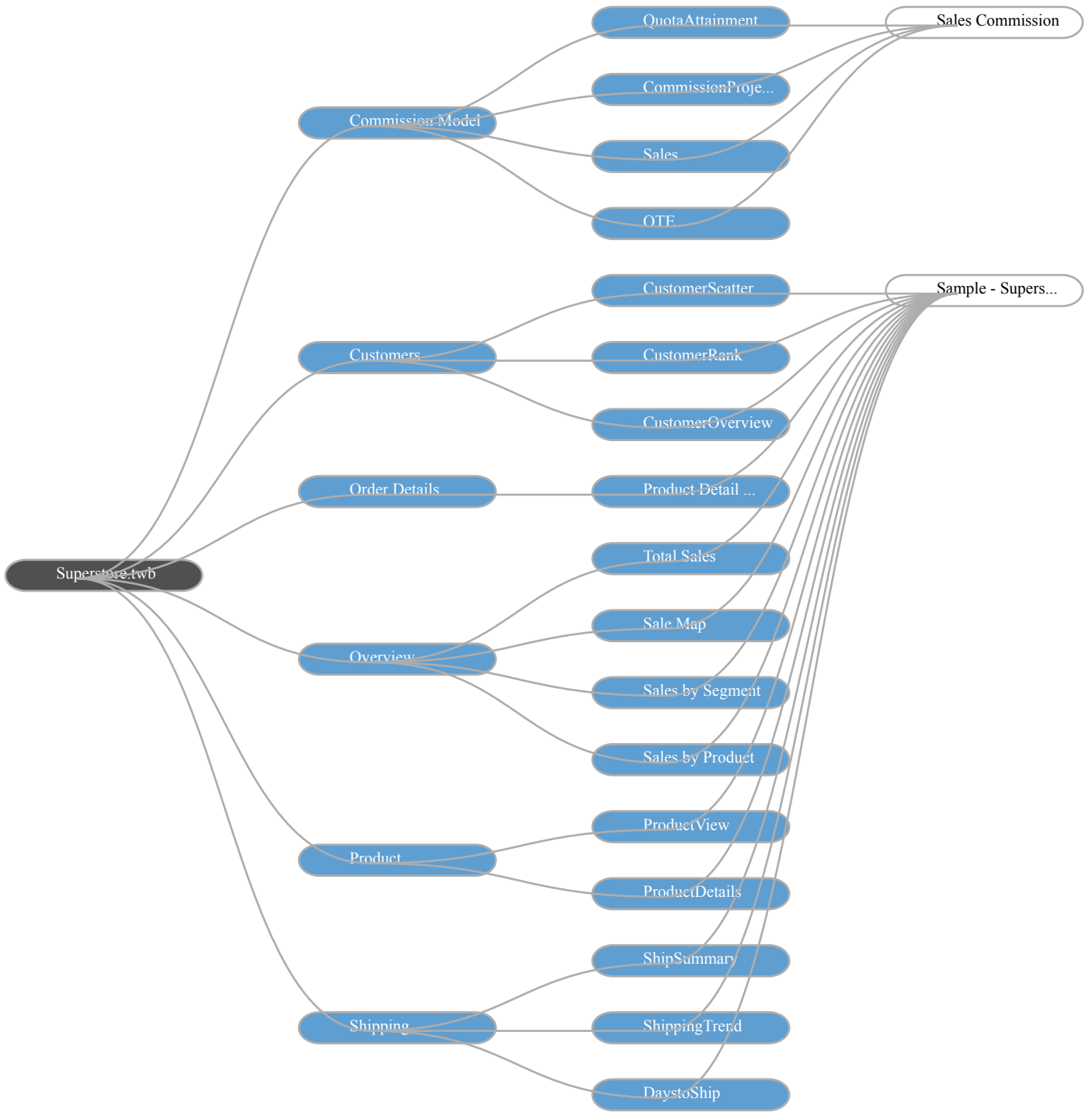
Calculated Field Name	Tableau Field Name	Data Source Name	Formula	Used?
Achievement (estimated)	Achievement (copy)	Sales Commission	[Sales]	Yes
Achieved Quota	Achievement (variable) (copy)	Sales Commission	if SUM([Achievement (estimated)]) >= [New Quota] then "100% +" elseif SUM([Achievement (estimated)]) >= 0.75 * [Parameters].[New Quota] then "75-100%" elseif SUM([Achievement (estimated)]) >= 0.5 * [Parameters].[New Quota] then "50-75%" else "Below 50%" end	Yes
Base (Variable)	Base (Variable)	Sales Commission	[Base Salary]	No
% of quota achieved	Calculation_0440925131659539	Sales Commission	AVG([Achievement (estimated)])/[New Quota]	Yes
Rank over 3	Calculation_4120925132203686	Sales Commission	ROUND(INDEX() / 3 - 0.6,0) + 1	Yes
Sort by field	Calculation_8140925133029303	Sales Commission	if [Sort by]="Names" then 0 elseif [Parameters].[Sort by]="% quota descending" then -[% of quota achieved] else [% of quota achieved] end	Yes
Commission (Variable)	Commission (Variable)	Sales Commission	([Commission Rate]*[Sales])/100	No
Estimate Compensation label	Estimate Compensation label	Sales Commission	"Estimated Compensation:"	No
OTE (Variable)	OTE (Variable)	Sales Commission	[Base Salary] + ([Parameters].[Commission Rate]*[Parameters].[New Quota])/100	No
Total Compensation	Total Compensation	Sales Commission	MIN([Base (Variable)]) + SUM([Commission (Variable)])	No
Total Sales label	Total Sales label	Sales Commission	"Total Sales:"	No
Days to Ship Actual	Calculation_0831103151444568	Sample - Superstore	DATEDIFF('day',[Order Date],[Ship Date])	Yes
Sales Forecast	Calculation_5421109230915137	Sample - Superstore	[Sales]*(1-[Churn Rate])*(1+[Parameters].[New Business Growth])	Yes
Ship Status	Calculation_6401103171259723	Sample - Superstore	if [Days to Ship Actual]> [Days to Ship Scheduled] then "Shipped Late" elseif [Days to Ship Actual]=[Days to Ship Scheduled] then "Shipped On Time" Else "Shipped Early" end	Yes
Days to Ship Scheduled	Calculation_6861103170623145	Sample - Superstore	CASE [Ship Mode] WHEN "Same Day" THEN 0 WHEN "First Class" THEN 1 WHEN "Second Class" THEN 3 WHEN "Standard Class" THEN 6 END	Yes
Order Profitable?	Calculation_9060122104947471	Sample - Superstore	{fixed [Order ID]:sum([Profit])}>0 // calculates the profit at the order level	Yes
Sales per Customer	Calculation_9321103144526191	Sample - Superstore	Sum([Sales])/countD([Customer Name])	Yes
Profit Ratio	Calculation_9921103144103743	Sample - Superstore	sum([Profit])/sum([Sales])	Yes
Sales above Target?	Calculation_9951107165644870	Sample - Superstore	If Sum([Sales])>SUM([federated.0hgpf0]1fdpvv316shikk0mmdlec].[Sales Target]) then "Above Target" else "Below Target" end	Yes
Units estimate	Sales est (copy)	Sample - Superstore	ROUND([Quantity]*(1-[Churn Rate])*(1+[Parameters].[New Business Growth]),0)	Yes
Profit per Order	Sales per Customer (copy)	Sample - Superstore	Sum([Profit])/countD([Order ID])	Yes

## Hierarchies

Hierarchy Name	Fields	Data Source Name	Used?
Location	Country/Region, Region, State/Province, City, Postal Code	Sample - Superstore	Yes
Product	Category, Sub-Category, Product Name	Sample - Superstore	Yes

## Parameters

Parameter Name	Data Type	Allowable Value Type	Current Value	Values	Used?
Base Salary	Integer	Range	50000	Min: 0, Max: undefined, Step size: 1000	Yes
Commission Rate	Float	Range	18.399999999999999	Min: 1.0, Max: 100.0, Step size: 0.10000000000000001	Yes
New Quota	Integer	Range	500000	Min: 100000, Max: undefined, Step size: 25000	Yes
Sort by	String	List	"Names"	"\% quota ascending", "\% quota descending", "Names"	Yes
New Business Growth	Float	Range	0.5999999999999998	Min: 0.0, Max: 1.0, Step size: 0.01	Yes
Churn Rate	Float	Range	0.06400000000000001	Min: 0.0, Max: 0.25, Step size: 0.001	Yes



# Unused Objects in Workbook

## Unused Fields

Data Source Alias	Field Name
Sample - Superstore	Row ID
Sample - Superstore	Customer ID
Sample - Superstore	Product ID
Sample - Superstore	Regional Manager
Sample - Superstore	Returned

## Unused Worksheets

- Forecast
- Performance
- What If Forecast

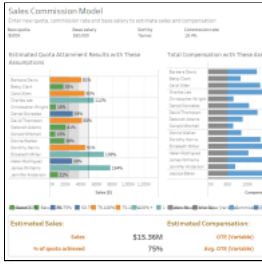
## Unused Calculations

- Base (Variable)
- Commission (Variable)
- Estimate Compensation label
- OTE (Variable)
- Total Compensation
- Total Sales label



# Dashboards

## Dashboard Name: Commission Model



### Commission Model Summary Stats

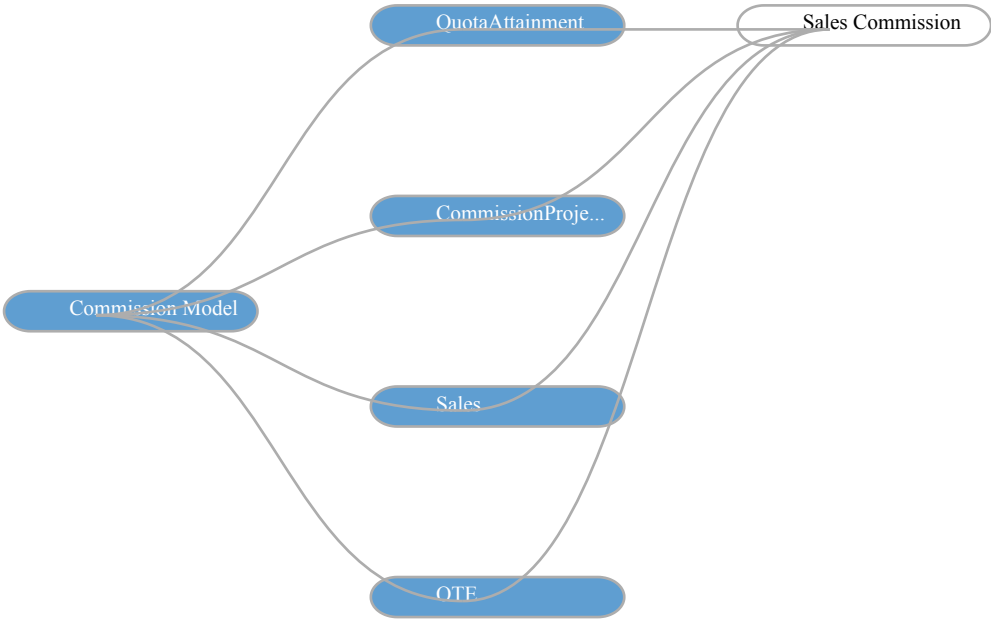
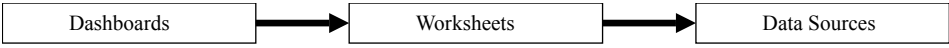
	Counts
Worksheets	4
Parameters	0
Quick Filters	0
Actions	1

### Below Worksheets were used in "Commission Model" Dashboard

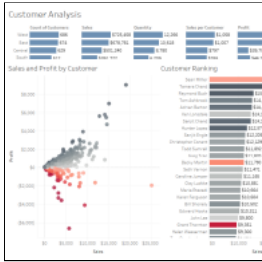
- QuotaAttainment
- CommissionProjection
- Sales
- OTE

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter(s)
Highlight 3 (generated) 1	QuotaAttainment, CommissionProjection, Sales, OTE	QuotaAttainment, CommissionProjection	on-select	Selected (Sales Person)



## Dashboard Name: Customers



### Customers Summary Stats

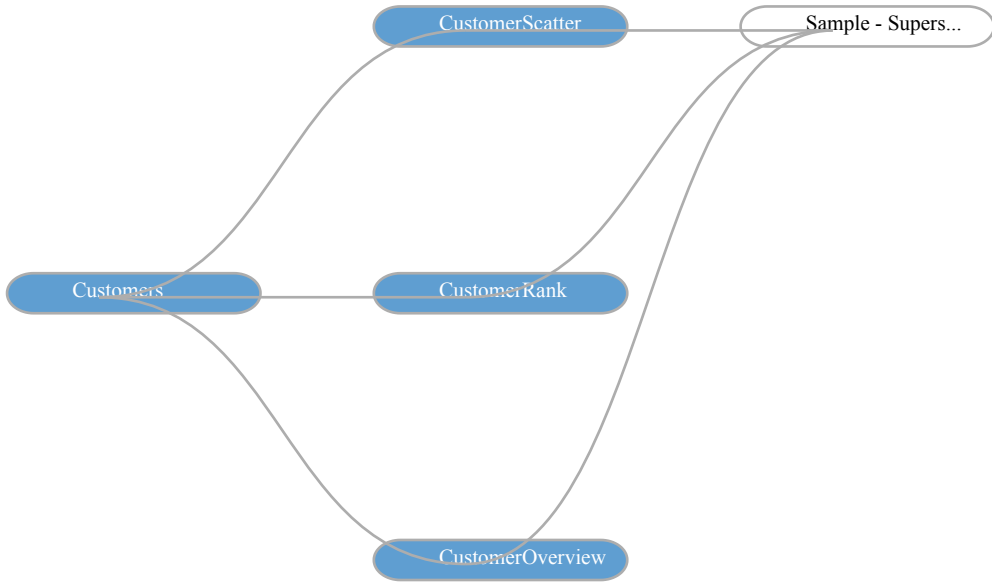
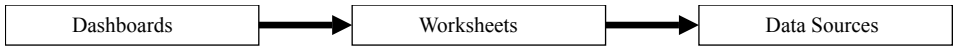
	Counts
Worksheets	3
Parameters	0
Quick Filters	0
Actions	3

### Below Worksheets were used in "Customers" Dashboard

- CustomerScatter
- CustomerRank
- CustomerOverview

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter(s)
Highlight Customer Name (Hover) 1	CustomerScatter, CustomerRank	CustomerScatter, CustomerRank	on-hover	Selected (Customer Name)
Filter Region 1	CustomerOverview	CustomerScatter, CustomerRank	on-select	Selected (Region)
Highlight 1 (generated) 1	CustomerScatter, CustomerRank	CustomerScatter, CustomerRank	on-select	all



## Dashboard Name: Order Details

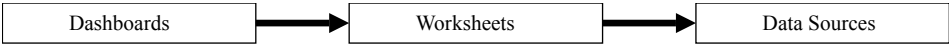
Order Details						
Product	Order	Date	Qty	Category	Unit	Price
<b>Product Detail Sheet</b>						
01-2019-000001	Product A	2019-01-01	10	Electronics	kg	100
01-2019-000002	Product B	2019-01-02	5	Electronics	kg	200
01-2019-000003	Product C	2019-01-03	3	Electronics	kg	300
01-2019-000004	Product D	2019-01-04	2	Electronics	kg	400
01-2019-000005	Product E	2019-01-05	1	Electronics	kg	500
01-2019-000006	Product F	2019-01-06	1	Electronics	kg	600
01-2019-000007	Product G	2019-01-07	1	Electronics	kg	700
01-2019-000008	Product H	2019-01-08	1	Electronics	kg	800
01-2019-000009	Product I	2019-01-09	1	Electronics	kg	900
01-2019-000010	Product J	2019-01-10	1	Electronics	kg	1000
01-2019-000011	Product K	2019-01-11	1	Electronics	kg	1100
01-2019-000012	Product L	2019-01-12	1	Electronics	kg	1200
01-2019-000013	Product M	2019-01-13	1	Electronics	kg	1300
01-2019-000014	Product N	2019-01-14	1	Electronics	kg	1400
01-2019-000015	Product O	2019-01-15	1	Electronics	kg	1500
01-2019-000016	Product P	2019-01-16	1	Electronics	kg	1600
01-2019-000017	Product Q	2019-01-17	1	Electronics	kg	1700
01-2019-000018	Product R	2019-01-18	1	Electronics	kg	1800
01-2019-000019	Product S	2019-01-19	1	Electronics	kg	1900
01-2019-000020	Product T	2019-01-20	1	Electronics	kg	2000

## Order Details Summary Stats

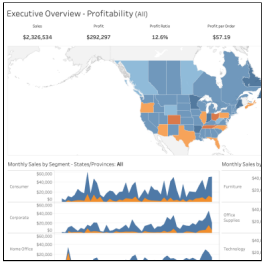
	Counts
Worksheets	1
Parameters	0
Quick Filters	0
Actions	0

## Below Worksheets were used in "Order Details" Dashboard

- Product Detail Sheet



## Dashboard Name: Overview



### Overview Summary Stats

	Counts
Worksheets	4
Parameters	0
Quick Filters	0
Actions	3

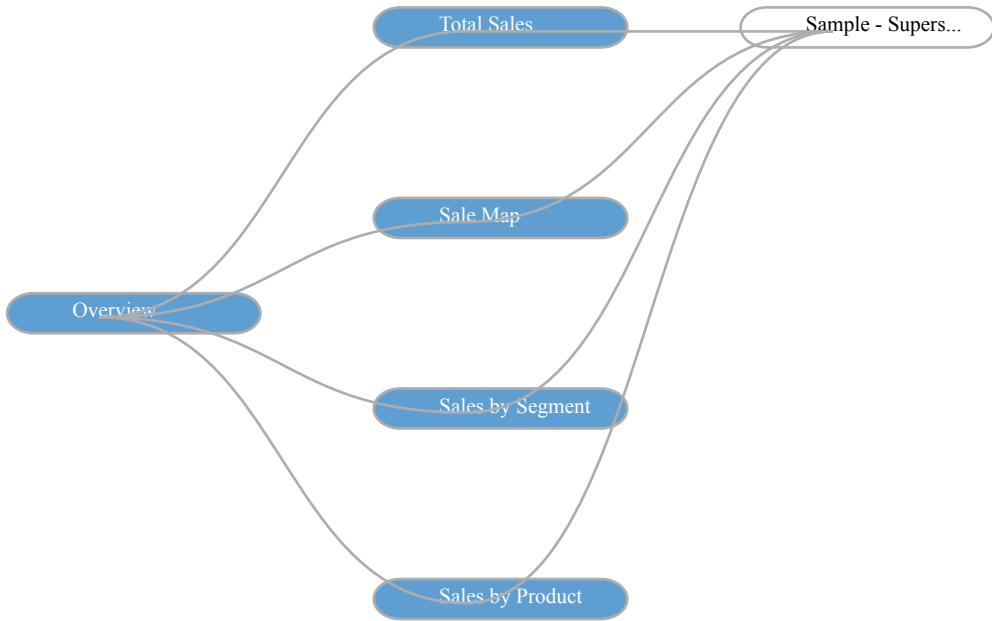
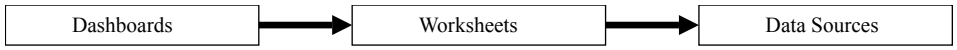
### Below Worksheets were used in "Overview" Dashboard

- Total Sales
- Sale Map
- Sales by Segment
- Sales by Product

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter(s)
State/Province Filter 1	Sale Map	Total Sales, Sales by Segment, Sales by Product	on-select	Selected (State/Province)
State/Province Highlight (map) 1	Total Sales, Sale Map	Total Sales, Sale Map	on-select	Selected (State/Province)
Month Highlight 1	Total Sales, Sales by Segment, Sales by Product	Total Sales, Sales by Segment, Sales by Product	on-select	Selected (MONTH(Order Date),Order Profitable?)





## Dashboard Name: Product



## Product Summary Stats

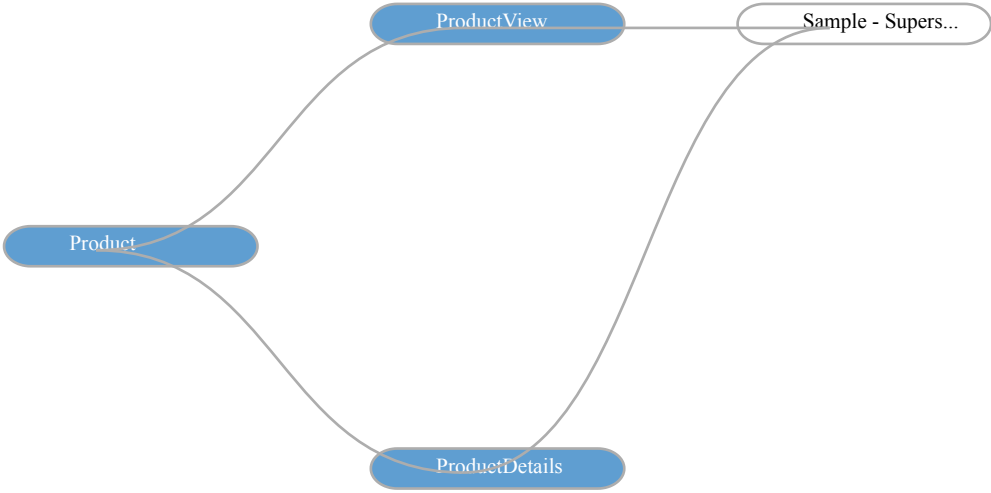
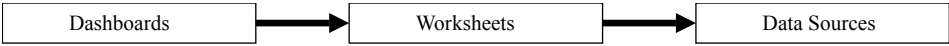
	Counts
Worksheets	2
Parameters	0
Quick Filters	0
Actions	1

## Below Worksheets were used in "Product" Dashboard

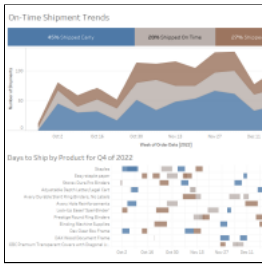
- ProductView
- ProductDetails

## Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter(s)
Filter Product Sales 1	ProductView	ProductView, ProductDetails	on-select	All



## Dashboard Name: Shipping



### Shipping Summary Stats

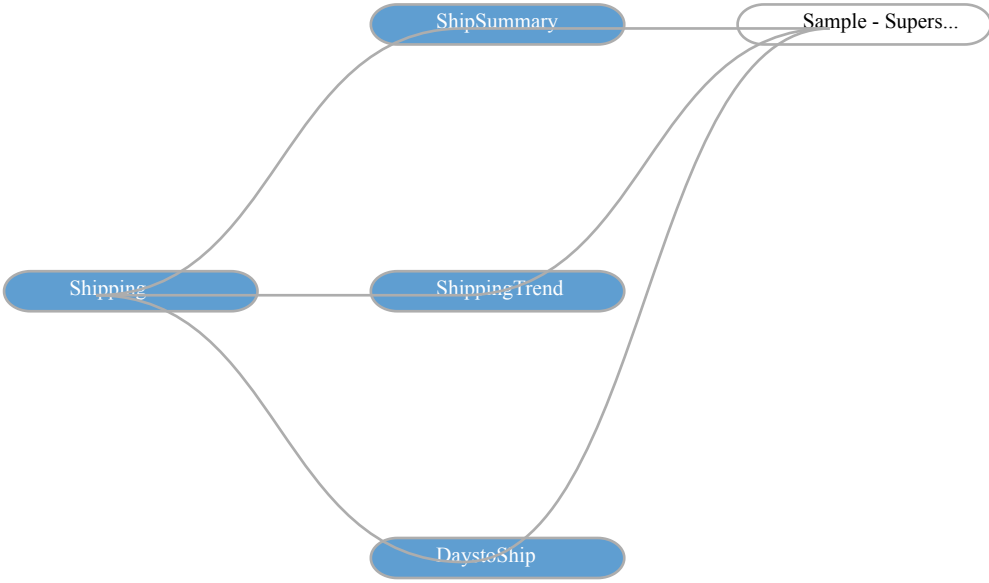
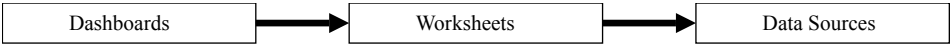
	Counts
Worksheets	3
Parameters	0
Quick Filters	0
Actions	2

### Below Worksheets were used in "Shipping" Dashboard

- ShipSummary
- ShippingTrend
- DaystoShip

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter(s)
Filter Details 1	ShippingTrend	ShippingTrend, DaystoShip	on-select	All
Filter 1 (generated) 1	ShipSummary	ShipSummary, ShippingTrend, DaystoShip	on-select	All



# Worksheets

## Worksheet Name: CommissionProjection

### Worksheet was used in the following Dashboards

- Commission Model

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sales Commission	Live	textscan	None

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: Sum(Commission )	Selected from list	All	None	None	No
Measure Names: Min(Base )	Selected from list	All	None	None	No

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Measure Names: Sum(Commission )	Color
Measure Names: Min(Base )	Color
Sum(Achievement (copy))	Detail
Total Compensation	Detail
Max(OTE (Variable))	Detail
Total Compensation	Detail
Achievement	Detail

### Calculated Fields Used

Field Name	Formula
Achievement (estimated)	[Sales]
Achieved Quota	if SUM([Achievement (estimated)]) >= [New Quota] then "100% +" elseif SUM([Achievement (estimated)]) >= 0.75 * [New Quota] then "75-100%" elseif SUM([Achievement (estimated)]) >= 0.5 * [Parameters].[New Quota] then "50-75%" else "Below 50%" end
Base (Variable)	[Base Salary]
% of quota achieved	AVG([Achievement (estimated)])/[New Quota]
Rank over 3	ROUND(INDEX() / 3 - 0.6,0) + 1
Sort by field	if [Sort by]="Names" then 0 elseif [Sort by]="% quota descending" then -[% of quota achieved] else [% of quota achieved] end
Commission (Variable)	([Commission Rate]*[Sales])/100
OTE (Variable)	[Base Salary] + ([Commission Rate]*[Parameters].[New Quota])/100
Total Compensation	MIN([Base (Variable)]) + SUM([Commission (Variable)])

## Columns & Rows in Worksheet

Field Name	Column/Row
(Rank over 3)	Rows
Sales Person	Rows
Measure Values	Columns



## Worksheet Name: CustomerOverview

### Worksheet was used in the following Dashboards

- Customers

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: CountD(Customer Name)	Selected from list	All	None	None	No
Measure Names: Sum(Sales)	Selected from list	All	None	None	No
Measure Names: Sum(Quantity)	Selected from list	All	None	None	No
Measure Names: (Sales per Customer)	Selected from list	All	None	None	No
Measure Names: Sum(Profit)	Selected from list	All	None	None	No
Measure Names: (Profit Ratio)	Selected from list	All	None	None	No
Category	Use all	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Segment	Use all	All	None	None	No
qr:Order Date:ok	Selected from list	All	None	None	No
Order Date	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter Region 1	CustomerOverview	CustomerScatter, CustomerRank	on-select	Selected (Region)

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
CountD(Customer Name)	Detail
Sum(Sales)	Detail
Sum(Quantity)	Detail
Sales per Customer	Detail
Sum(Profit)	Detail
Profit Ratio	Detail

### Calculated Fields Used

Field Name	Formula
Days to Ship Actual	DATEDIFF('day',[Order Date],[Ship Date])
Days to Ship Scheduled	CASE [Ship Mode] WHEN "Same Day" THEN 0 WHEN "First Class" THEN 1 WHEN "Second Class" THEN 3 WHEN "Standard Class" THEN 6 END
Sales per Customer	Sum([Sales])/countD([Customer Name])
Profit Ratio	sum([Profit])/sum([Sales])

### Columns & Rows in Worksheet

Field Name	Column/Row
Region	Rows
:Measure Names	Columns
Measure Values	Columns

## Worksheet Name: CustomerRank

### Worksheet was used in the following Dashboards

- Customers

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action Region	Use all	All	None	None	No
Category	Use all	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Segment	Use all	All	None	None	No
Order Date	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Highlight Customer Name (Hover) 1	CustomerScatter, CustomerRank	CustomerScatter, CustomerRank	on-hover	Selected (Customer Name)
Highlight 1 (generated) 1	CustomerScatter, CustomerRank	CustomerScatter, CustomerRank	on-select	all

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Profit Ratio	Color
Sum(Profit)	Tooltip
Sum(Sales)	Detail

### Calculated Fields Used

Field Name	Formula
Profit Ratio	sum([Profit])/sum([Sales])

### Columns & Rows in Worksheet

Field Name	Column/Row
Customer Name	Rows
Sum(Sales)	Columns

## Worksheet Name: CustomerScatter

### Worksheet was used in the following Dashboards

- Customers

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action Region	Use all	All	None	None	No
Category	Use all	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Segment	Use all	All	None	None	No
Order Date	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Highlight Customer Name (Hover) 1	CustomerScatter, CustomerRank	CustomerScatter, CustomerRank	on-hover	Selected (Customer Name)
Highlight 1 (generated) 1	CustomerScatter, CustomerRank	CustomerScatter, CustomerRank	on-select	all

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Profit Ratio	Color
Customer Name	Detail
Profit Ratio	Detail

### Calculated Fields Used

Field Name	Formula
Profit Ratio	sum([Profit])/sum([Sales])

### Columns & Rows in Worksheet

Field Name	Column/Row
Sum(Profit)	Rows
Sum(Sales)	Columns

## Worksheet Name: DaystoShip

### Worksheet was used in the following Dashboards

- Shipping

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action Delayed?	Use all	All	None	None	No
Action Ship Status	Use all	All	None	None	No
Action Ship Status, YEAROrder Date, WEEKOrder Date	Use all	All	None	None	No
Ship Status	Use all	All	None	None	No
Region	Use all	All	None	None	No
Ship Mode	Use all	All	None	None	No
qr:Order Date:ok	Selected from list	All	None	None	No
Order Date	Selected from list	All	None	None	No

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Ship Status	Color
Sum(Days to Ship Actual)	Size
Order ID	Detail
Customer Name	Detail
Ship Mode	Detail

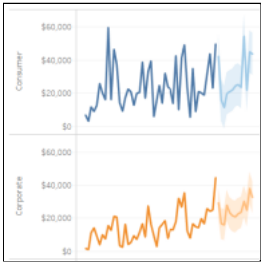
### Calculated Fields Used

Field Name	Formula
Days to Ship Actual	DATEDIFF('day',[Order Date],[Ship Date])
Ship Status	if [Days to Ship Actual]> [Days to Ship Scheduled] then "Shipped Late" elseIF [Days to Ship Actual]=[Days to Ship Scheduled] then "Shipped On Time" Else "Shipped Early" end
Days to Ship Scheduled	CASE [Ship Mode] WHEN "Same Day" THEN 0 WHEN "First Class" THEN 1 WHEN "Second Class" THEN 3 WHEN "Standard Class" THEN 6 END

## Columns & Rows in Worksheet

Field Name	Column/Row
Product Name	Rows
Order Date	Columns

## Worksheet Name: Forecast



### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Segment	Color
Forecast Indicator	Color

### Columns & Rows in Worksheet

Field Name	Column/Row
Segment	Rows
Sum(Sales)	Rows
Month-Trunc(Order Date)	Columns

## Worksheet Name: OTE

### Worksheet was used in the following Dashboards

- Commission Model

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sales Commission	Live	textscan	None

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: Sum(OTE )	Selected from list	All	None	None	No
Measure Names: Avg(OTE )	Selected from list	All	None	None	No

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Measure Values	Label

### Calculated Fields Used

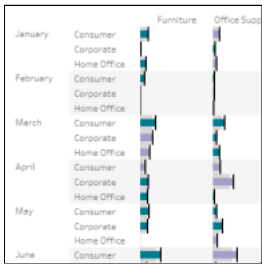
Field Name	Formula
Rank over 3	ROUND(INDEX() / 3 - 0.6,0) + 1
OTE (Variable)	[Base Salary] + ([Commission Rate]*[Parameters].[New Quota])/100

### Columns & Rows in Worksheet

Field Name	Column/Row
:Measure Names	Rows



## Worksheet Name: Performance



### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	None
Sales Target	Live	excel-direct	None

### Blends

Primary Data Source	Primary DS Blended Field Name	Secondary Data Source	Secondary DS Blended Field Name
Sample - Superstore	Order Date (Month)	Sales Target	Order Date (Month)
Sample - Superstore	Category	Sales Target	Category
Sample - Superstore	Segment	Sales Target	Segment
Sample - Superstore	Order Date (Year)	Sales Target	Order Date (Year)

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Region	Use all	All	None	None	No
Order Date	Use all	All	None	None	No

### Marks

#### Mark Class: Bar

Object(s) Used	Mark Type
Sales above Target?	Color
Sum(Sales Target)	Detail
SUM([Sales])-SUM([Sales Target],[Sales Target])	Detail

### Calculated Fields Used

Field Name	Formula
Sales above Target?	If Sum([Sales])>SUM([federated.0hgpf0]1fdpvv316shikk0mmdlec).[Sales Target]) then "Above Target" else "Below Target" end

## Columns & Rows in Worksheet

Field Name	Column/Row
yr:Order Date	Rows
Month(Order Date)	Rows
Segment	Rows
Category	Columns
Sum(Sales)	Columns

## Worksheet Name: Product Detail Sheet

### Worksheet was used in the following Dashboards

- Order Details

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: Sum(Sales)	Selected from list	All	None	None	No
Measure Names: Sum(Quantity)	Selected from list	All	None	None	No
Measure Names: Sum(Discount)	Selected from list	All	None	None	No
Measure Names: Sum(Profit)	Selected from list	All	None	None	No
Measure Names: (Profit Ratio)	Selected from list	All	None	None	No
Measure Names: Sum(Days to Ship Scheduled)	Selected from list	All	None	None	No
Measure Names: Sum(Days to Ship Actual)	Selected from list	All	None	None	No
Action Order Profitable?,MONTHOrder Date,Segment	Use all	All	None	None	No
Action Postal Code,State/Province 1	Use all	All	None	None	No
Category	Use all	All	None	None	No
City	Selected from list	All	None	None	No
Order Date	Customized from List	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Segment	Use all	All	None	None	No
State/Province	Use all	All	None	None	No

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Measure Values	Label

### Calculated Fields Used

Field Name	Formula
Days to Ship Actual	DATEDIFF('day',[Order Date],[Ship Date])

Field Name	Formula
Days to Ship Scheduled	CASE [Ship Mode] WHEN "Same Day" THEN 0 WHEN "First Class" THEN 1 WHEN "Second Class" THEN 3 WHEN "Standard Class" THEN 6 END
Order Profitable?	{fixed [Order ID]:sum([Profit])}>0 // calculates the profit at the order level
Profit Ratio	sum([Profit])/sum([Sales])

### Columns & Rows in Worksheet

Field Name	Column/Row
Order ID	Rows
Customer Name	Rows
Order Date	Rows
Ship Date	Rows
Ship Mode	Rows
:Measure Names	Columns

## Worksheet Name: ProductDetails

### Worksheet was used in the following Dashboards

- Product

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action Category, YEAROrder Date, MONTHOrder Date	Use all	All	None	None	No
Action YEAROrder Date, MONTHOrder Date	Use all	All	None	None	No
Action YEAROrder Date, MONTHOrder Date, Product Category	Use all	All	None	None	No
mn:Order Date:ok	Use all	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Order Date	Use all	All	None	None	No

### Marks

#### Mark Class: Circle

Object(s) Used	Mark Type
Profit Ratio	Color
Product Name	Detail
Category	Detail
Sum(Profit)	Detail

### Calculated Fields Used

Field Name	Formula
Profit Ratio	sum([Profit])/sum([Sales])

### Columns & Rows in Worksheet

Field Name	Column/Row
Category	Rows
Sub-Category	Rows
Segment	Columns
Sum(Sales)	Columns

## Worksheet Name: ProductView

### Worksheet was used in the following Dashboards

- Product

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Category	Use all	All	None	None	No
Region	Use all	All	None	None	No
Order Date	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter Product Sales 1	ProductView	ProductView, ProductDetails	on-select	All

### Marks

#### Mark Class: Square

Object(s) Used	Mark Type
Sum(Sales)	Color
Sum(Sales)	Label
Sum(Profit)	Tooltip

### Columns & Rows in Worksheet

Field Name	Column/Row
Category	Rows
yr:Order Date	Rows
Month(Order Date)	Columns

## Worksheet Name: QuotaAttainment

### Worksheet was used in the following Dashboards

- Commission Model

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sales Commission	Live	textscan	None

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
% of quota achieved	Label
Achievement	Color
[New Quota]	Detail
Total Compensation	Detail
Max(OTE (Variable))	Detail
Total Compensation	Detail

### Calculated Fields Used

Field Name	Formula
Achievement (estimated)	[Sales]
Achieved Quota	if SUM([Achievement (estimated)]) >= [New Quota] then "100% +" elseif SUM([Achievement (estimated)]) >= 0.75 * [New Quota] then "75-100%" elseif SUM([Achievement (estimated)]) >= 0.5 * [Parameters].[New Quota] then "50-75%" else "Below 50%" end
Base (Variable)	[Base Salary]
% of quota achieved	AVG([Achievement (estimated)])/[New Quota]
Rank over 3	ROUND(INDEX() / 3 - 0.6,0) + 1
Sort by field	if [Sort by]="Names" then 0 elseif [Sort by]="% quota descending" then -[% of quota achieved] else [% of quota achieved] end
Commission (Variable)	([Commission Rate]*[Sales])/100
OTE (Variable)	[Base Salary] + ([Commission Rate]*[Parameters].[New Quota])/100
Total Compensation	MIN([Base (Variable)]) + SUM([Commission (Variable)])

### Columns & Rows in Worksheet

Field Name	Column/Row
(Rank over 3)	Rows
Sales Person	Rows
sum:Achievement copy:qk	Columns

## Worksheet Name: Sale Map

### Worksheet was used in the following Dashboards

- Overview

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Order Profitable?	Selected from list	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Profit Ratio	In-Range	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
State/Province Filter 1	Sale Map	Total Sales, Sales by Segment, Sales by Product	on-select	Selected (State/Province)
State/Province Highlight (map) 1	Total Sales, Sale Map	Total Sales, Sale Map	on-select	Selected (State/Province)

### Marks

#### Mark Class: Multipolygon

Object(s) Used	Mark Type
Profit Ratio	Color
Tooltip: Profit Ratio by City	Tooltip
State/Province	Detail
Country/Region	Detail
[Geometry (generated)]	geometry

### Calculated Fields Used

Field Name	Formula
Order Profitable?	{fixed [Order ID]:sum([Profit])}>0 // calculates the profit at the order level
Profit Ratio	sum([Profit])/sum([Sales])

### Columns & Rows in Worksheet

Field Name	Column/Row
Latitude generated	Rows
Longitude generated	Columns



## Worksheet Name: Sales

### Worksheet was used in the following Dashboards

- Commission Model

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sales Commission	Live	textscan	None

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: Sum(Sales)	Selected from list	All	None	None	No
Measure Names: (% of quota achieved)	Selected from list	All	None	None	No

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Measure Values	Label

### Calculated Fields Used

Field Name	Formula
Achievement (estimated)	[Sales]
% of quota achieved	AVG([Achievement (estimated)])/[New Quota]

### Columns & Rows in Worksheet

Field Name	Column/Row
:Measure Names	Rows

## Worksheet Name: Sales by Product

### Worksheet was used in the following Dashboards

- Overview

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action MONTHOrder Date,Segment	Use all	All	None	None	No
Action Postal Code,State/Province	Use all	All	None	None	No
Action State/Province	Use all	All	None	None	No
Order Profitable?	Selected from list	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Month Highlight 1	Total Sales, Sales by Segment, Sales by Product	Total Sales, Sales by Segment, Sales by Product	on-select	Selected (MONTH(Order Date),Order Profitable?)

### Marks

#### Mark Class: Area

Object(s) Used	Mark Type
Measure Names: false(undefined)	Color
Measure Names: true(undefined)	Color
Sum(Profit)	Tooltip

### Calculated Fields Used

Field Name	Formula
Order Profitable?	{fixed [Order ID]:sum([Profit])}>0 // calculates the profit at the order level

### Columns & Rows in Worksheet

Field Name	Column/Row
Category	Rows
Sum(Sales)	Rows
Month-Trunc(Order Date)	Columns

## Worksheet Name: Sales by Segment

### Worksheet was used in the following Dashboards

- Overview

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action MONTHOrder Date,Product Category	Use all	All	None	None	No
Action Postal Code,State/Province	Use all	All	None	None	No
Action State/Province	Use all	All	None	None	No
Order Profitable?	Selected from list	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Month Highlight 1	Total Sales, Sales by Segment, Sales by Product	Total Sales, Sales by Segment, Sales by Product	on-select	Selected (MONTH(Order Date),Order Profitable?)

### Marks

#### Mark Class: Area

Object(s) Used	Mark Type
Measure Names: false(undefined)	Color
Measure Names: true(undefined)	Color
Sum(Profit)	Tooltip

### Calculated Fields Used

Field Name	Formula
Order Profitable?	{fixed [Order ID]:sum([Profit])}>0 // calculates the profit at the order level

### Columns & Rows in Worksheet

Field Name	Column/Row
Segment	Rows
Sum(Sales)	Rows
Month-Trunc(Order Date)	Columns

## Worksheet Name: ShipSummary

### Worksheet was used in the following Dashboards

- Shipping

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Ship Status	Use all	All	None	None	No
Region	Use all	All	None	None	No
Ship Mode	Use all	All	None	None	No
qr:Order Date:ok	Selected from list	All	None	None	No
Order Date	Selected from list	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter 1 (generated) 1	ShipSummary	ShipSummary, ShippingTrend, DaystoShip	on-select	All

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Ship Status	Color
Count(__tableau_internal_object_id__). [Orders_6D2EF74F348B46BDA976A7AEEA6FB5C9]	Label
Ship Status	Label

### Calculated Fields Used

Field Name	Formula
Days to Ship Actual	DATEDIFF('day',[Order Date],[Ship Date])
Ship Status	if [Days to Ship Actual]> [Days to Ship Scheduled] then "Shipped Late" elseIF [Days to Ship Actual]=[Days to Ship Scheduled] then "Shipped On Time" Else "Shipped Early" end
Days to Ship Scheduled	CASE [Ship Mode] WHEN "Same Day" THEN 0 WHEN "First Class" THEN 1 WHEN "Second Class" THEN 3 WHEN "Standard Class" THEN 6 END

### Columns & Rows in Worksheet

Field Name	Column/Row
Count(__tableau_internal_object_id__).Orders_6D2EF74F348B46BDA976A7AEEA6FB5C9	Columns

## Worksheet Name: ShippingTrend

### Worksheet was used in the following Dashboards

- Shipping

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Action Delayed?	Use all	All	None	None	No
Action Ship Status	Use all	All	None	None	No
Region	Use all	All	None	None	No
Ship Mode	Use all	All	None	None	No
qr:Order Date:ok	Selected from list	All	None	None	No
Order Date	Selected from list	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
Filter Details 1	ShippingTrend	ShippingTrend, DaystoShip	on-select	All

### Marks

#### Mark Class: Area

Object(s) Used	Mark Type
Ship Status	Color

### Calculated Fields Used

Field Name	Formula
Days to Ship Actual	DATEDIFF('day',[Order Date],[Ship Date])
Ship Status	if [Days to Ship Actual]> [Days to Ship Scheduled] then "Shipped Late" elseIF [Days to Ship Actual]=[Days to Ship Scheduled] then "Shipped On Time" Else "Shipped Early" end
Days to Ship Scheduled	CASE [Ship Mode] WHEN "Same Day" THEN 0 WHEN "First Class" THEN 1 WHEN "Second Class" THEN 3 WHEN "Standard Class" THEN 6 END

### Columns & Rows in Worksheet

Field Name	Column/Row
__tableau_internal_object_id__	Rows
yr:Order Date	Columns
Week-Trunc(Order Date)	Columns

## Worksheet Name: Tooltip Profit Ratio by City

### Calculated Fields Used

Field Name	Formula
Profit Ratio	sum([Profit])/sum([Sales])

## Worksheet Name: Total Sales

### Worksheet was used in the following Dashboards

- Overview

### Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

### Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: Sum(Sales)	Selected from list	All	None	None	No
Measure Names: Sum(Profit)	Selected from list	All	None	None	No
Measure Names: (Profit Ratio)	Selected from list	All	None	None	No
Measure Names: (Sales per Customer )	Selected from list	All	None	None	No
Measure Names: (Sales per Customer)	Selected from list	All	None	None	No
Measure Names: Avg(Discount)	Selected from list	All	None	None	No
Measure Names: Sum(Quantity)	Selected from list	All	None	None	No
Action Order Profitable?,Category,MONTH Order Date	Use all	All	None	None	No
Action Order Profitable?,MONTHOrder Date,Segment	Use all	All	None	None	No
Action State/Province	Use all	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No

### Actions

Action Name	Source Sheet	Target Sheet	Run Action On	Target Filter
State/Province Highlight (map) 1	Total Sales, Sale Map	Total Sales, Sale Map	on-select	Selected (State/Province)
Month Highlight 1	Total Sales, Sales by Segment, Sales by Product	Total Sales, Sales by Segment, Sales by Product	on-select	Selected (MONTH(Order Date),Order Profitable?)

### Marks

#### Mark Class: Automatic

Object(s) Used	Mark Type
Measure Values	Label

### Calculated Fields Used

Field Name	Formula
Sales Forecast	[Sales]*(1-[Churn Rate])*(1+[New Business Growth])
Order Profitable?	{fixed [Order ID]:sum([Profit])}>0 // calculates the profit at the order level
Sales per Customer	Sum([Sales])/countD([Customer Name])
Profit Ratio	sum([Profit])/sum([Sales])
Units estimate	ROUND([Quantity]*(1-[Churn Rate])*(1+[New Business Growth]),0)
Profit per Order	Sum([Profit])/countD([Order ID])

### Columns & Rows in Worksheet

Field Name	Column/Row
:Measure Names	Columns



## Worksheet Name: What If Forecast

			Q1
Central	Consumer	Sales	\$16,477
		Sales Forecast	\$24,677
	Corporate	Sales	\$13,094
		Sales Forecast	\$19,555
	Home Office	Sales	\$2,148
Total	Sales Forecast	\$32,211	
East	Consumer	Sales	\$7,155
		Sales Forecast	\$10,711
	Corporate	Sales	\$6,239
		Sales Forecast	\$9,344
	Home Office	Sales	\$1,965
Total	Sales Forecast	\$29,800	

## Data Sources

Data Source alias	Data Source type	Source	Joins
Sample - Superstore	Live	excel-direct	[Region (Orders\$)] join [Region (People)] join [Order ID (Orders\$)] join [Order ID (Returns)] join

## Filters

Field Name	Field selection	Field Wildcard	Field Condition	Field Limit	Context Filter
Measure Names: Sum(Sales)	Selected from list	All	None	None	No
Measure Names: Sum(Sales Forecast)	Selected from list	All	None	None	No
Order Date	In-Range	All	None	max[#2022-12-30#], min[#2019-01-03#]	No
Region	Use all	All	None	None	No
Order Date	Use all	All	None	None	No

## Marks

### Mark Class: Automatic

Object(s) Used	Mark Type
Measure Names: Sum(Sales)	Color
Measure Names: Sum(Sales Forecast)	Color
Measure Values	Label
SUM([Sales])-SUM([Sales Forecast])	Detail
Sum(Sales)	Detail
Sum(Sales Forecast)	Detail

## Calculated Fields Used

Field Name	Formula
Sales Forecast	[Sales]*(1-[Churn Rate])*(1+[New Business Growth])

## Columns & Rows in Worksheet

Field Name	Column/Row
Region	Rows
Segment	Rows
:Measure Names	Rows
Quarter(Order Date)	Columns
Month(Order Date)	Columns