|  |  |
| --- | --- |
|  |  |

**Tableau Workbook Name: Superstore.twbx**

|  |  |
| --- | --- |
| Background: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Requested by: |  | Requested date: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Developed by: |  | Completed date: |  |

|  |  |
| --- | --- |
| Audience: |  |

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## 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 |
| Stories # | 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)]  |

## Worksheets Mapping

|  |  |  |  |
| --- | --- | --- | --- |
| **Dashboard/Storyboard Name** | **Worksheet Name** | **Object Type (Dashboard/Storyboard)** | **Used?** |
| [Commission Model](#CommissionModel) | [QuotaAttainment](#QuotaAttainment) | Dashboard | Yes |
| [Commission Model](#CommissionModel) | [CommissionProjection](#CommissionProjection) | Dashboard | Yes |
| [Commission Model](#CommissionModel) | [Sales](#Sales) | Dashboard | Yes |
| [Commission Model](#CommissionModel) | [OTE](#OTE) | Dashboard | Yes |
| [Customers](#Customers) | [CustomerScatter](#CustomerScatter) | Dashboard | Yes |
| [Customers](#Customers) | [CustomerRank](#CustomerRank) | Dashboard | Yes |
| [Customers](#Customers) | [CustomerOverview](#CustomerOverview) | Dashboard | Yes |
| [Order Details](#OrderDetails) | [Product Detail Sheet](#ProductDetailSheet) | Dashboard | Yes |
| [Overview](#Overview) | [Total Sales](#TotalSales) | Dashboard | Yes |
| [Overview](#Overview) | [Sale Map](#SaleMap) | Dashboard | Yes |
| [Overview](#Overview) | [Sales by Segment](#SalesbySegment) | Dashboard | Yes |
| [Overview](#Overview) | [Sales by Product](#SalesbyProduct) | Dashboard | Yes |
| [Overview](#Overview) | [Tooltip: Profit Ratio by City (Used in Sale Map as a Tooltip)](#TooltipProfitRatiobyCity) | Dashboard | Yes |
| [Product](#Product) | [ProductView](#ProductView) | Dashboard | Yes |
| [Product](#Product) | [ProductDetails](#ProductDetails) | Dashboard | Yes |
| [Shipping](#Shipping) | [ShipSummary](#ShipSummary) | Dashboard | Yes |
| [Shipping](#Shipping) | [ShippingTrend](#ShippingTrend) | Dashboard | Yes |
| [Shipping](#Shipping) | [DaystoShip](#DaystoShip) | Dashboard | Yes |
| N/A | [Forecast](#Forecast) | N/A | No |
| N/A | [Performance](#Performance) | N/A | No |
| N/A | [What If Forecast](#WhatIfForecast) | N/A | No |

## Tables and Fields

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

## Calculated Fields

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Calculated Field Name** | **Tableau Field Name** | **Data Source Name** | **Formula** | **Used?** | **Dimension/
Measure** |
| Estimate Compensation label | Estimate Compensation label | Sales Commission | "Estimated Compensation:" | No | Dimension |
| Total Sales label | Total Sales label | Sales Commission | "Total Sales:" | No | Dimension |
| Achievement (estimated) | Achievement (copy) | Sales Commission | [Sales] | Yes | Measure |
| 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 | Measure |
| Base (Variable) | Base (Variable) | Sales Commission | [Base Salary] | Yes | Measure |
| % of quota achieved | Calculation\_0440925131659539 | Sales Commission | AVG([Achievement (estimated)])/[New Quota] | Yes | Measure |
| Rank over 3 | Calculation\_4120925132203686 | Sales Commission | ROUND(INDEX() / 3 - 0.6,0) + 1 | Yes | Measure |
| 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 | Measure |
| Commission (Variable) | Commission (Variable) | Sales Commission | ([Commission Rate]\*[Sales])/100 | Yes | Measure |
| OTE (Variable) | OTE (Variable) | Sales Commission | [Base Salary] + ([Parameters].[Commission Rate]\*[Parameters].[New Quota])/100 | Yes | Measure |
| Total Compensation | Total Compensation | Sales Commission | MIN([Base (Variable)]) + SUM([Commission (Variable)]) | Yes | Measure |
| 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 | Dimension |
| Order Profitable? | Calculation\_9060122104947471 | Sample - Superstore | {fixed [Order ID]:sum([Profit])}>0
// calculates the profit at the order level | Yes | Dimension |
| Days to Ship Actual | Calculation\_0831103151444568 | Sample - Superstore | DATEDIFF('day',[Order Date],[Ship Date]) | Yes | Measure |
| Sales Forecast | Calculation\_5421109230915137 | Sample - Superstore | [Sales]\*(1-[Churn Rate])\*(1+[Parameters].[New Business Growth]) | Yes | Measure |
| 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 | Measure |
| Sales per Customer | Calculation\_9321103144526191 | Sample - Superstore | Sum([Sales])/countD([Customer Name]) | Yes | Measure |
| Profit Ratio | Calculation\_9921103144103743 | Sample - Superstore | sum([Profit])/sum([Sales]) | Yes | Measure |
| Sales above Target? | Calculation\_9951107165644870 | Sample - Superstore | If Sum([Sales])>SUM([Sales Target].[Sales Target]) then "Above Target" else "Below Target" end | Yes | Measure |
| Units estimate | Sales est (copy) | Sample - Superstore | ROUND([Quantity]\*(1-[Churn Rate])\*(1+[Parameters].[New Business Growth]),0) | Yes | Measure |
| Profit per Order | Sales per Customer (copy) | Sample - Superstore | Sum([Profit])/countD([Order ID]) | Yes | Measure |

## 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, 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, Step size: 25000 | Yes |
| Sort by | String | List | Names | % quota ascending, % quota descending, Names | Yes |
| New Business Growth | Float | Range | 0.59999999999999998 | Min: 0.0, Max: 1.0, Step size: 0.01 | Yes |
| Churn Rate | Float | Range | 0.064000000000000001 | Min: 0.0, Max: 0.25, Step size: 0.001 | Yes |

## Workbook Map



# Unused Objects in Workbook

## Unused Fields

|  |  |
| --- | --- |
| **Data Source Alias** | **Field Name** |
| Sales Commission | Order Date |
| Sales Commission | Region |
| Sales Target | Category |
| Sales Target | Order Date |
| Sales Target | Segment |
| Sample - Superstore | Row ID |
| Sample - Superstore | Customer ID |
| Sample - Superstore | Product ID |
| Sample - Superstore | Regional Manager |
| Sample - Superstore | Returned |

## Unused Worksheets

* [Forecast](#Forecast)
* [Performance](#Performance)
* [What If Forecast](#WhatIfForecast)

## Unused Calculations

* Estimate Compensation label
* Total Sales label

# **Dashboards**

## Dashboard Name: Commission Model



### "Commission Model" Summary Stats

|  |  |
| --- | --- |
|  | **Counts** |
| Worksheets # | 4 |
| Parameters # | 4 |
| Quick Filters # | 0 |
| Actions # | 1 |

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

* [QuotaAttainment](#QuotaAttainment)
* [CommissionProjection](#CommissionProjection)
* [Sales](#Sales)
* [OTE](#OTE)

### Parameters used

* New Quota
* Base Salary
* Sort by
* Commission Rate

### Actions

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



## Dashboard Name: Customers



### "Customers" Summary Stats

|  |  |
| --- | --- |
|  | **Counts** |
| Worksheets # | 3 |
| Parameters # | 0 |
| Quick Filters # | 3 |
| Actions # | 3 |

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

* [CustomerScatter](#CustomerScatter)
* [CustomerRank](#CustomerRank)
* [CustomerOverview](#CustomerOverview)

### Quick Filters Applied

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Sheet Name** | **Apply to** |
|  Order Date  | CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Performance, ProductDetails, ProductView, ShipSummary, ShippingTrend, What If Forecast | Selected |
|  Category  | CustomerOverview, CustomerRank, CustomerScatter, Product Detail Sheet, ProductView | Selected |
|  Segment  | CustomerOverview, CustomerRank, CustomerScatter, Product Detail Sheet | Selected |

### Actions

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



## Dashboard Name: Order Details



### "Order Details" Summary Stats

|  |  |
| --- | --- |
|  | **Counts** |
| Worksheets # | 1 |
| Parameters # | 0 |
| Quick Filters # | 6 |
| Actions # | 0 |

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

* [Product Detail Sheet](#ProductDetailSheet)

### Quick Filters Applied

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Sheet Name** | **Apply to** |
|  Order Date  | CustomerOverview, CustomerRank, CustomerScatter, Forecast, Product Detail Sheet, ProductDetails, Sale Map, Sales by Product, Sales by Segment, Tooltip: Profit Ratio by City, Total Sales, What If Forecast | Selected |
|  Region  | CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Forecast, Performance, Product Detail Sheet, ProductDetails, ProductView, Sale Map, Sales by Product, Sales by Segment, ShipSummary, ShippingTrend, Total Sales, What If Forecast | Selected |
|  State/Province  | Product Detail Sheet | All |
|  City  | Product Detail Sheet | All |
|  Category  | CustomerOverview, CustomerRank, CustomerScatter, Product Detail Sheet, ProductView | Selected |
|  Segment  | CustomerOverview, CustomerRank, CustomerScatter, Product Detail Sheet | Selected |



## Dashboard Name: Overview



### "Overview" Summary Stats

|  |  |
| --- | --- |
|  | **Counts** |
| Worksheets # | 4 |
| Parameters # | 0 |
| Quick Filters # | 3 |
| Actions # | 3 |

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

* [Total Sales](#TotalSales)
* [Sale Map](#SaleMap)
* [Sales by Segment](#SalesbySegment)
* [Sales by Product](#SalesbyProduct)

### Quick Filters Applied

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Sheet Name** | **Apply to** |
|  Region  | CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Forecast, Performance, Product Detail Sheet, ProductDetails, ProductView, Sale Map, Sales by Product, Sales by Segment, ShipSummary, ShippingTrend, Total Sales, What If Forecast | Selected |
|  Order Date  | CustomerOverview, CustomerRank, CustomerScatter, Forecast, Product Detail Sheet, ProductDetails, Sale Map, Sales by Product, Sales by Segment, Tooltip: Profit Ratio by City, Total Sales, What If Forecast | Selected |
|  Profit Ratio  | Sale Map | Only this |

### Actions

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

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

* [ProductView](#ProductView)
* [ProductDetails](#ProductDetails)

### Quick Filters Applied

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Sheet Name** | **Apply to** |
|  Region  | CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Forecast, Performance, Product Detail Sheet, ProductDetails, ProductView, Sale Map, Sales by Product, Sales by Segment, ShipSummary, ShippingTrend, Total Sales, What If Forecast | Selected |

### Actions

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



## Dashboard Name: Shipping



### "Shipping" Summary Stats

|  |  |
| --- | --- |
|  | **Counts** |
| Worksheets # | 3 |
| Parameters # | 0 |
| Quick Filters # | 3 |
| Actions # | 2 |

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

* [ShipSummary](#ShipSummary)
* [ShippingTrend](#ShippingTrend)
* [DaystoShip](#DaystoShip)

### Quick Filters Applied

|  |  |  |
| --- | --- | --- |
| **Field Name** | **Sheet Name** | **Apply to** |
|  Order Date  | CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Performance, ProductDetails, ProductView, ShipSummary, ShippingTrend, What If Forecast | Selected |
|  Region  | CustomerOverview, DaystoShip, ShipSummary, ShippingTrend | Selected |
|  Ship Mode  | CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Forecast, Performance, Product Detail Sheet, ProductDetails, ProductView, Sale Map, Sales by Product, Sales by Segment, ShipSummary, ShippingTrend, Total Sales, What If Forecast | Selected |

### Actions

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



# **Worksheets**

## Worksheet Name: CommissionProjection

### Worksheet was used in the following Dashboards

* [Commission Model](#CommissionModel)

### 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Measure Names | Color |
| Sum (Achievement (estimated)) | Detail |
| Custom (Total Compensation) | Detail |
| Maximum (OTE (Variable)) | Detail |
| Custom (Total Compensation) | Detail |
| Custom (Achieved Quota) | Detail |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

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

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Sales Person | Field | Ascending | Sort by field | Custom |
| Measure Names | Manual | NA | NA | NA |
| Achieved Quota | Manual | NA | NA | NA |

## Worksheet Name: CustomerOverview

### Worksheet was used in the following Dashboards

* [Customers](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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 | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |
| Region | Use all |  | All | None | None | No |
| Segment | Use all |  | All | None | None | No |
| Order Date | Selected from list | None | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Count (Distinct) (Customer Name) | Detail |
| Sum (Sales) | Detail |
| Sum (Quantity) | Detail |
| Custom (Sales per Customer) | Detail |
| Sum (Profit) | Detail |
| Custom (Profit Ratio) | Detail |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Region | Rows |
| Measure Names | Columns |
| Measure Values | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Region | Field | Descending | Customer Name | Count (Distinct) |
| Measure Names | Manual | NA | NA | NA |

## Worksheet Name: CustomerRank

### Worksheet was used in the following Dashboards

* [Customers](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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 | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (Profit Ratio) | Color |
| Sum (Profit) | Tooltip |
| Sum (Sales) | Detail |

### Calculated Fields

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

### Columns and Rows

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

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Customer Name | Field | Descending | Sales | Sum |

## Worksheet Name: CustomerScatter

### Worksheet was used in the following Dashboards

* [Customers](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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 | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (Profit Ratio) | Color |
| Customer Name | Detail |
| Custom (Profit Ratio) | Detail |

### Calculated Fields

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

### Columns and Rows

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

## Worksheet Name: DaystoShip

### Worksheet was used in the following Dashboards

* [Shipping](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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,YEAR(Order Date),WEEK(Order 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 |
| Order Date | Selected from list | Q4 | All | None | None | No |
| Order Date | Selected from list | 2023 | All | None | None | No |

### Marks

|  |  |
| --- | --- |
| **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

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Product Name | Rows |
| Order Date | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Customer Name | Field | Ascending | Order Date | Minimum |
| Product Name | Field | Descending | Days to Ship Actual | Sum |

## 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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |
| Region | Use all |  | All | None | None | No |

### Marks

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Segment | Color |
| Forecast Indicator | Color |

### Columns and Rows

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

## Worksheet Name: OTE

### Worksheet was used in the following Dashboards

* [Commission Model](#CommissionModel)

### 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Measure Values | Label |

### Calculated Fields

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

### Columns and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Measure Names | Rows |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Measure Names | Manual | NA | NA | NA |

## Worksheet Name: Performance



### 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)]  |
| 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** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Region | Use all |  | All | None | None | No |
| Order Date | Use all |  | All | None | None | No |

### Marks

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (Sales above Target?) | Color |
| Sum (Sales Target) | Detail |
| Custom (SUM([Sales])-SUM([Sales Target].[Sales Target])) | Detail |

### Calculated Fields

|  |  |
| --- | --- |
| **Field Name** | **Formula** |
| Sales above Target? | If Sum([Sales])>SUM([Sales Target].[Sales Target]) then "Above Target" else "Below Target" end |

### Columns and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Year (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](#OrderDetails)

### 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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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?,MONTH(Order 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 | Excluded from list | None | All | None | None | No |
| Order Date | Manual Selection | None | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |
| Region | Use all |  | All | None | None | No |
| Segment | Use all |  | All | None | None | No |
| State/Province | Use all |  | All | None | None | No |

### Marks

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Measure Values | Label |

### Calculated Fields

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

### Columns and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Order ID | Rows |
| Customer Name | Rows |
| Order Date | Rows |
| Ship Date | Rows |
| Ship Mode | Rows |
| Measure Names | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Measure Names | Manual | NA | NA | NA |

## Worksheet Name: ProductDetails

### Worksheet was used in the following Dashboards

* [Product](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Action (Category,YEAR(Order Date),MONTH(Order Date)) | Use all |  | All | None | None | No |
| Action (YEAR(Order Date),MONTH(Order Date)) | Use all |  | All | None | None | No |
| Action (YEAR(Order Date),MONTH(Order Date),Product Category) | Use all |  | All | None | None | No |
| Order Date | Use all |  | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |
| Region | Use all |  | All | None | None | No |
| Order Date | Use all |  | All | None | None | No |

### Marks

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (Profit Ratio) | Color |
| Product Name | Detail |
| Category | Detail |
| Sum (Profit) | Detail |

### Calculated Fields

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

### Columns and Rows

|  |  |
| --- | --- |
| **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](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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

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

### Columns and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Category | Rows |
| Year (Order Date) | Rows |
| Month (Order Date) | Columns |

## Worksheet Name: QuotaAttainment

### Worksheet was used in the following Dashboards

* [Commission Model](#CommissionModel)

### Data Sources

|  |  |  |  |
| --- | --- | --- | --- |
| **Data Source Alias** | **Data Source Type** | **Source** | **Joins** |
| Sales Commission | Live | textscan | None |

### Marks

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (% of quota achieved) | Label |
| Custom (Achieved Quota) | Color |
| New Quota | Detail |
| Custom (Total Compensation) | Detail |
| Maximum (OTE (Variable)) | Detail |
| Custom (Total Compensation) | Detail |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Custom (Rank over 3) | Rows |
| Sales Person | Rows |
| Sum (Achievement (estimated)) | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Sales Person | Field | Ascending | Sort by field | Custom |
| Achieved Quota | Manual | NA | NA | NA |

## Worksheet Name: Sale Map

### Worksheet was used in the following Dashboards

* [Overview](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Order Profitable? | Selected from list | false, true | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |
| Region | Use all |  | All | None | None | No |
| Profit Ratio | In-Range | From -0.22 to 0.37 | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (Profit Ratio) | Color |
| State/Province | Detail |
| Country/Region | Detail |
| Tooltip: Profit Ratio by City | Viz in Tooltip |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Latitude (generated) | Rows |
| Longitude (generated) | Columns |

## Worksheet Name: Sales

### Worksheet was used in the following Dashboards

* [Commission Model](#CommissionModel)

### 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Measure Values | Label |

### Calculated Fields

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

### Columns and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Measure Names | Rows |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Measure Names | Manual | NA | NA | NA |

## Worksheet Name: Sales by Product

### Worksheet was used in the following Dashboards

* [Overview](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Action (MONTH(Order 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 | false, true | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Order Profitable? | Color |
| Sum (Profit) | Tooltip |

### Calculated Fields

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

### Columns and Rows

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

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Order Profitable? | Manual | NA | NA | NA |

## Worksheet Name: Sales by Segment

### Worksheet was used in the following Dashboards

* [Overview](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Action (MONTH(Order 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 | false, true | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Order Profitable? | Color |
| Sum (Profit) | Tooltip |

### Calculated Fields

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

### Columns and Rows

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

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Order Profitable? | Manual | NA | NA | NA |

## Worksheet Name: ShipSummary

### Worksheet was used in the following Dashboards

* [Shipping](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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 |
| Order Date | Selected from list | Q4 | All | None | None | No |
| Order Date | Selected from list | 2023 | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Ship Status | Color |
| Count (Orders) | Label |
| Ship Status | Label |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Count (Orders) | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Ship Status | Manual | NA | NA | NA |

## Worksheet Name: ShippingTrend

### Worksheet was used in the following Dashboards

* [Shipping](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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 |
| Order Date | Selected from list | Q4 | All | None | None | No |
| Order Date | Selected from list | 2023 | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Ship Status | Color |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Count (Orders) | Rows |
| Year (Order Date) | Columns |
| Week (Order Date) | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Ship Status | Manual | NA | NA | NA |

## Worksheet Name: Tooltip: Profit Ratio by City

### 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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **Field Wildcard** | **Field Condition** | **Field Limit** | **Context Filter**  |
| Tooltip (Country/Region,State/Province) | Use all |  | All | None | None | No |
| Tooltip (State/Province) | Use all |  | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |

### Marks

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Custom (Profit Ratio) | Color |

### Calculated Fields

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

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| City | Field | Ascending | Profit Ratio | Custom |

## Worksheet Name: Total Sales

### Worksheet was used in the following Dashboards

* [Overview](#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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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?,MONTH(Order Date),Segment) | Use all |  | All | None | None | No |
| Action (State/Province) | Use all |  | All | None | None | No |
| Order Date | In-Range | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | 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

|  |  |
| --- | --- |
| **Object(s) Used** | **Mark Type** |
| Measure Values | Label |

### Calculated Fields

|  |  |
| --- | --- |
| **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 and Rows

|  |  |
| --- | --- |
| **Field Name** | **Column/Row** |
| Measure Names | Columns |

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Measure Names | Manual | NA | NA | NA |

## Worksheet Name: What If 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)]  |

### Filters

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Field Name** | **Field Selection** | **Selected Field Value(s)** | **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 | From 2020-01-03 to 2023-12-30 | All | None | max[#2023-12-30#], min[#2020-01-03#] | No |
| Region | Use all |  | All | None | None | No |
| Order Date | Use all |  | All | None | None | No |

### Marks

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

### Calculated Fields

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

### Columns and Rows

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

### Applied Sortings

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Field Name** | **Sort By** | **Sort Order** | **Aggregation Field** | **Aggregation Type** |
| Measure Names | Manual | NA | NA | NA |