LOGO

Tableau Workbook Name: Superstore.twbx

Background:			
Requested by:		Requested date:	
Developed by:		Completed date:	
Audience:			

Table of Contents

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	QuotaAttainment	Dashboard	Yes
Commission Model	CommissionProjection	Dashboard	Yes
Commission Model	Sales	Dashboard	Yes
Commission Model	OTE	Dashboard	Yes
Customers	CustomerScatter	Dashboard	Yes
Customers	CustomerRank	Dashboard	Yes
Customers	CustomerOverview	Dashboard	Yes
Order Details	Product Detail Sheet	Dashboard	Yes
Overview	Total Sales	Dashboard	Yes
Overview	Sale Map	Dashboard	Yes
Overview	Sales by Segment	Dashboard	Yes
Overview	Sales by Product	Dashboard	Yes
Overview	Tooltip: Profit Ratio by City (Used in Sale Map as a Tooltip)	Dashboard	Yes
Product	ProductView	Dashboard	Yes
Product	ProductDetails	Dashboard	Yes
Shipping	ShipSummary	Dashboard	Yes
Shipping	ShippingTrend	Dashboard	Yes
Shipping	DaystoShip	Dashboard	Yes
N/A	Forecast	N/A	No
N/A	Performance	N/A	No
N/A	What If Forecast	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

Data Source	Source Database	Table Name	Field Name	Remote Field	Data Type	Used	Dimension/Measure	Hidden
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 → Dashboards → Worksheets → Data Sources

Superstore.twbx

Commission Model
Customers
Order Details
Overview
Product
Shipping

CommissionProje...
CustomerOverview
CustomerRank
CustomerScatter
DaystoShip
Forecast
OTE
Performance
Product Detail ...
ProductDetails
ProductView
QuotaAttainment
Sale Map
Sales
Sales by Product
Sales by Segment
ShipSummary

Sales Commission
Sample - Supers...
Sales Target

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
- Performance
- What If Forecast

Unused Calculations

- Estimate Compensation label
- Total Sales label

Dashboards

Dashboard Name: Commission Model
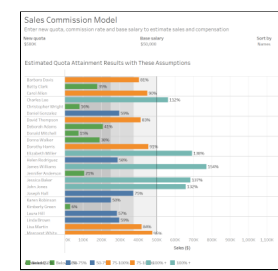
Commission Model Summary Stats

	Counts
Worksheets	4
Parameters	4
Quick Filters	0
Actions	1

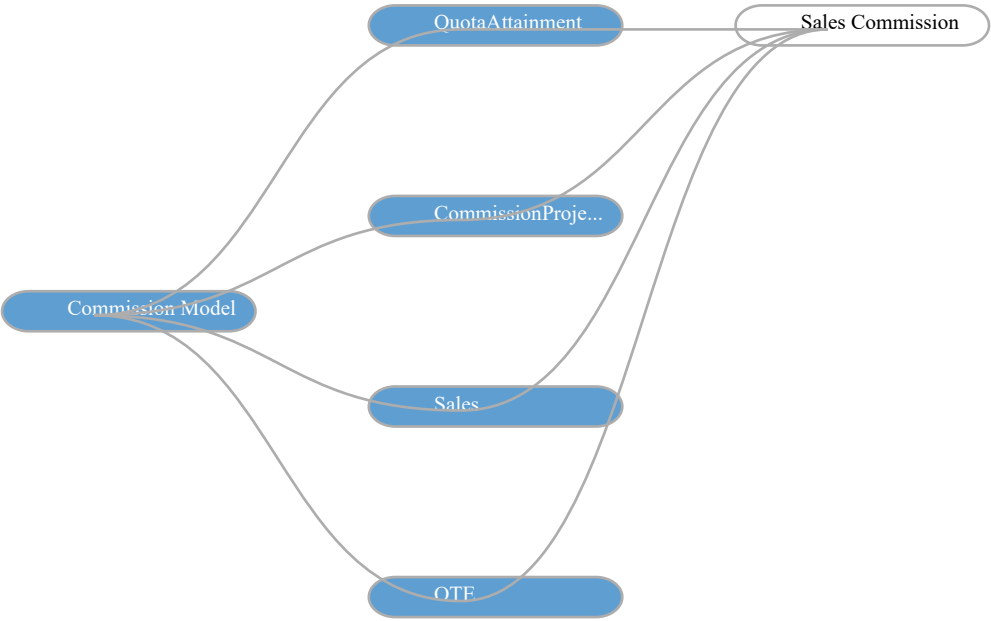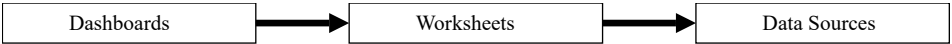## Below Worksheets were used in "Commission Model" Dashboard

- QuotaAttainment
- CommissionProjection
- Sales
- 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(s)
Highlight 3 (generated) 1	Highlight	QuotaAttainment, CommissionProjection, Sales, OTE	QuotaAttainment, CommissionProjection	on-select	Selected (Sales Person)

| Dashboards | → | Worksheets | → | Data Sources |

QuotaAttainment

Sales Commission

CommissionProje...

Commission Model

Sales

OTE

Dashboard Name: Customers

Customers Summary Stats

	Counts
Worksheets	3
Parameters	0
Quick Filters	3
Actions	3

Below Worksheets were used in "Customers" Dashboard

- CustomerScatter
- CustomerRank
- 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(s)
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

Dashboards	➡	Worksheets	➡	Data Sources

CustomerScatter

Sample - Supers...

Customers

CustomerRank

CustomerOverview
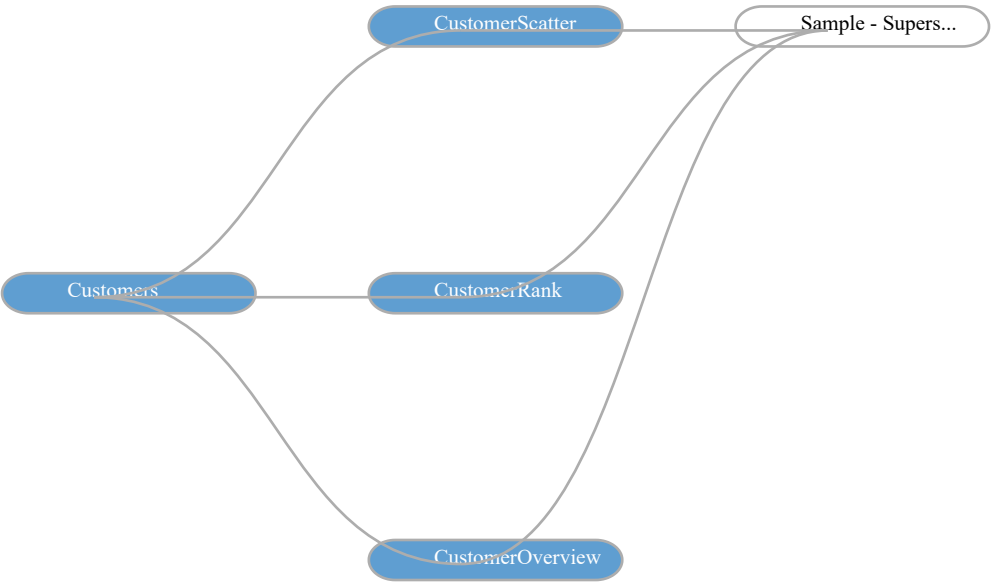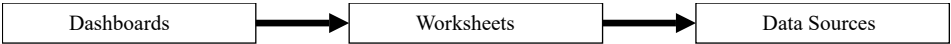
Dashboard Name: Order Details

Order Details Summary Stats

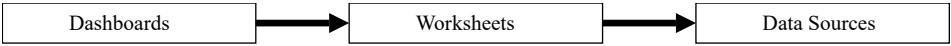|	Counts
Worksheets	1
Parameters	0
Quick Filters	6
Actions	0

Below Worksheets were used in "Order Details" Dashboard

- Product Detail Sheet

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

```
┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│   Dashboards    │ ───▶ │   Worksheets    │ ───▶ │  Data Sources   │
└─────────────────┘      └─────────────────┘      └─────────────────┘
```

```
( Order Details ) ──── ( Product Detail ... ) ──── ( Sample - Supers... )
```

Dashboard Name: Overview
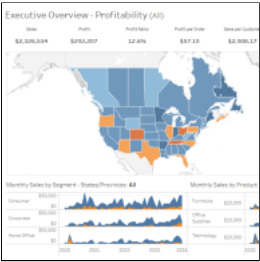
Overview Summary Stats

	Counts
Worksheets	4
Parameters	0
Quick Filters	3
Actions	3

Below Worksheets were used in "Overview" Dashboard

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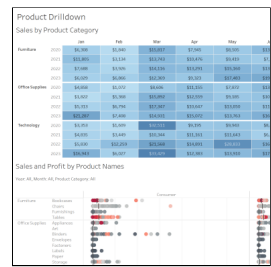- Sales by Segment
- Sales by Product

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(s)
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?)

```
┌─────────────────┐      ┌─────────────────┐      ┌─────────────────┐
│   Dashboards    │ ───▶ │   Worksheets    │ ───▶ │  Data Sources   │
└─────────────────┘      └─────────────────┘      └─────────────────┘
```

Total Sales

Sample - Supers...

Sale Map

Overview

Sales by Segment

Sales by Product
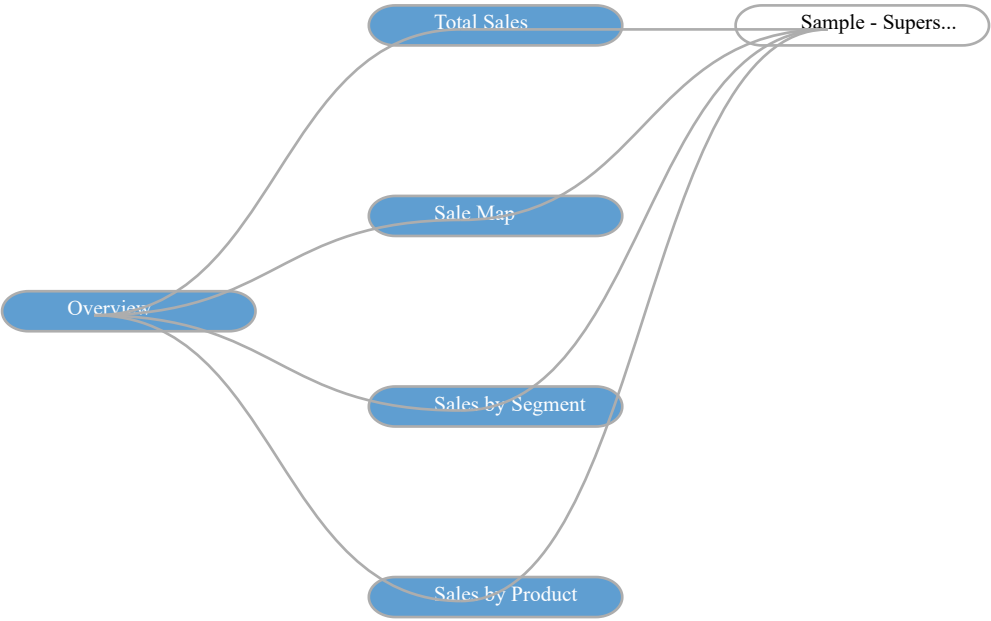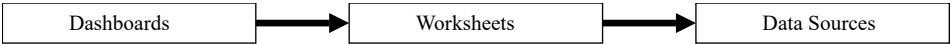
Dashboard Name: Product

Product Summary Stats

	Counts
Worksheets	2
Parameters	0
Quick Filters	1
Actions	1

Below Worksheets were used in "Product" Dashboard

- ProductView
- 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(s)
Filter Product Sales 1	Filter	ProductView	ProductView, ProductDetails	on-select	All

Dashboards	→	Worksheets	→	Data Sources

ProductView

Sample - Supers...

Product

ProductDetails
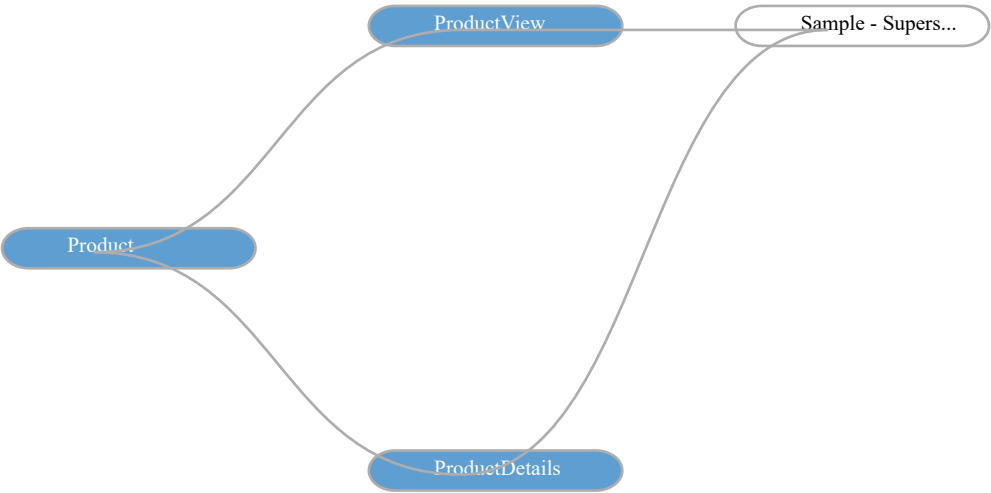
Dashboard Name: Shipping

Shipping Summary Stats

	Counts
Worksheets	3
Parameters	0
Quick Filters	3
Actions	2

Below Worksheets were used in "Shipping" Dashboard

- ShipSummary
- ShippingTrend
- DaystoShip

Quick filters Applied

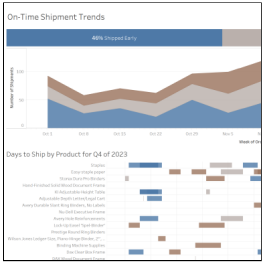| Field Name	Sheet Name	Apply to
Order Date	CustomerOverview, CustomerRank, CustomerScatter, DaystoShip, Performance, ProductDetails, ProductView, ShipSummary, ShippingTrend, What If Forecast	Selected
Region	CustomerOverview, DaystoShip, ShipSummary, ShippingTrend	Selected
Ship Mode	CustomerOverview, 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(s)
Filter Details 1	Filter	ShippingTrend	ShippingTrend, DaystoShip	on-select	All
Filter 1 (generated) 1	Filter	ShipSummary	ShipSummary, ShippingTrend, DaystoShip	on-select	All

Dashboards	➤	Worksheets	➤	Data Sources

ShipSummary

Sample - Supers...

Shipping

ShippingTrend

DaystoShip
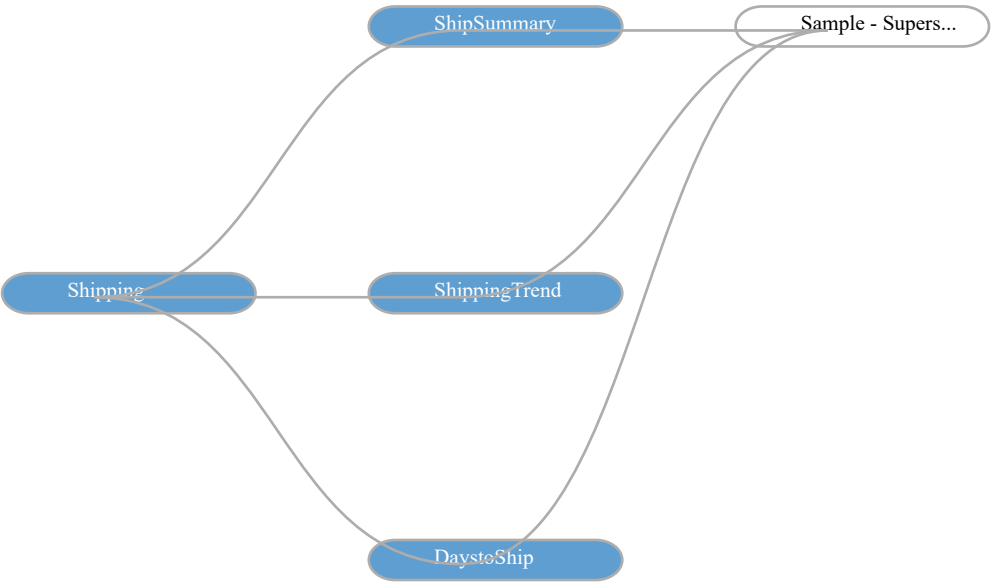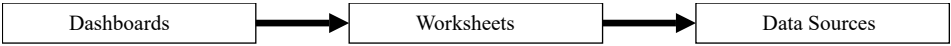
Worksheets

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	Color
Sum (Achievement (estimated))	Detail
Custom (Total Compensation)	Detail
Maximum (OTE (Variable))	Detail
Custom (Total Compensation)	Detail
Custom (Achieved Quota)	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
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

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

Mark Class: Automatic

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 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

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

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

Mark Class: Automatic

Object(s) Used	Mark Type
Custom (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

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

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

Mark Class: Automatic

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

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

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

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

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 (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

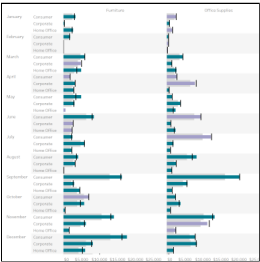## Columns & Rows in Worksheet

Field Name	Column/Row
Measure Names	Rows

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

Mark Class: Bar

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 Used

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

Columns & Rows in Worksheet

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

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

Mark Class: Automatic

Object(s) Used	Mark Type
Measure Values	Label

Calculated Fields Used

Field Name	Formula

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 & 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

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

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

Mark Class: Circle

Object(s) Used	Mark Type
Custom (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

Field Name	Column/Row

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)]

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

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
Year (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
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 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
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

Field Name	Sort By	Sort Order	Aggregation Field	Aggregation Type
Achieved Quota	Manual	NA	NA	NA

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)]

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

Mark Class: Multipolygon

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 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

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

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

Mark Class: Area

Object(s) Used	Mark Type
Order Profitable?	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 (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

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

Mark Class: Area

Object(s) Used	Mark Type
Order Profitable?	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 (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

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

Mark Class: Automatic

Object(s) Used	Mark Type
Ship Status	Color
Count (Orders)	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 (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

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

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
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

Mark Class: Automatic

Object(s) Used	Mark Type
Custom (Profit Ratio)	Color

Calculated Fields Used

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

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

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

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

Mark Class: Automatic

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 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

Applied Sortings

Field Name	Sort By	Sort Order	Aggregation Field	Aggregation Type
Measure Names	Manual	NA	NA	NA