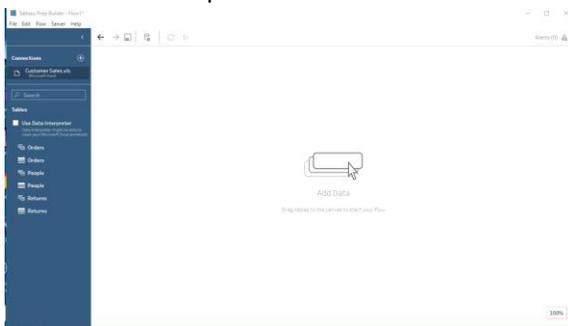


# Tableau Prep Builder Take Home Exercise

## Steps to connect to data.

1. Start Tableau Prep Builder on your laptop or desktop.
2. Expand the Connection Tab clicking the caret near the top left ( < ).
3. Click the plus sign which expands the connections and select Microsoft Excel.
4. When the File Explorer (Finder on Mac) opens select the provided Excel workbook, Customer Sales.xls.
5. Your Tableau Prep Builder should look like this with Customer Sales.xls showing it is connected.

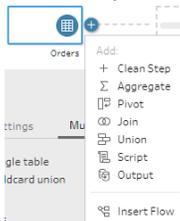


## Steps to prepare/clean the data.

1. If you Tables (to the left ) show the sheets twice each select the second one that has this icon



2. Drag the orders to the “canvas”.
3. Click the plus sign and select Clean Step



4. First review all the data (not the grid) that is profiled and determine if there is any inconsistencies such as misspelled data values, abbreviations or columns that do not provide value. Here is what you should find.

- a. Row Id, Customer Id and Product Id are not required, they can be removed.
- b. Country/Region has variations for United States

**Hint:** (Use group common characters first, then select the correct spelling and find other values that should be included by highlighting the correct spelling a list will appear to the right with other choices to include) You should a paper clip icon to the left so show you have grouped values.

- c. City has variations for City spellings (see hint above). 2 instances should be found.
- d. State has variations for State (do the same here using group common values). 2 instances should be found.
- e. Postal Code is being treated as an integer not a string (character) so it is changing the look of the data. Convert it to string.

Fix the above first before moving forward

# Tableau Prep Builder Take Home Exercise

## Steps to split columns

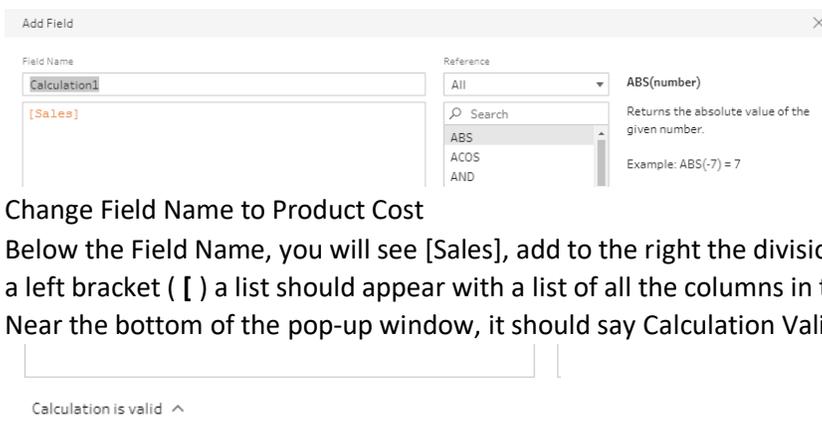
1. Create two columns from the Customer Name column by splitting them automatically. This will create two new columns to your left. Rename them Customer First Name and Customer Last Name. In the grid below you should see this:

Customer First Name	Customer Last Name	Order ID	Order Date
Claire	Gute	CA-2018-152156	11/08/2018
Claire	Gute	CA-2018-152156	11/08/2018
Darrin	Van	CA-2018-138688	06/12/2018

Delete (remove) the column Customer Name (found just a bit to your right).

## Steps to calculate product cost

1. Click on Sales and select Create Calculated Field -> Custom Calculation

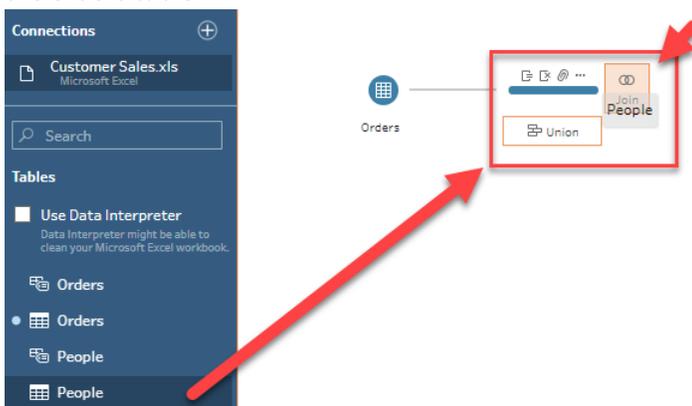


2. Change Field Name to Product Cost
3. Below the Field Name, you will see [Sales], add to the right the division symbol ( / ) following by a left bracket ( [ ) a list should appear with a list of all the columns in the table, select quantity. Near the bottom of the pop-up window, it should say Calculation Valid.

Click Save to close the window.

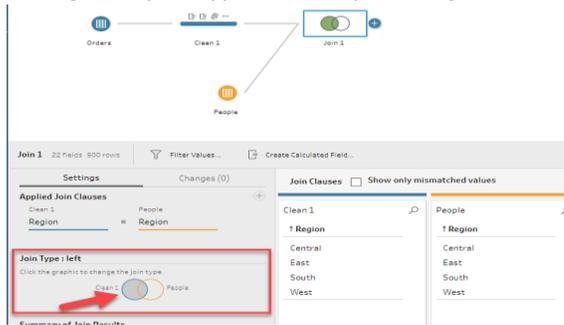
## Steps to add regional salespeople

1. From the left pane, drag the People table (the second icon not the first) and create a join with the orders table.



## Tableau Prep Builder Take Home Exercise

2. Change the join type to left by clicking the circle on the left (this is a Venn diagram by the way)



Click in the checkbox Join Clause – Show only mismatch values. None should appear.  
If you scroll to the very right of the data, you will find the new fields (Person and Region).

### Steps to reorder the data set prior to output

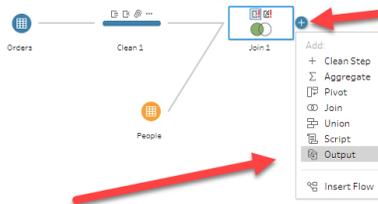
1. Click on Person field and move it to right of Region (back to the left).
2. Rename Person to Sales Person, and Region to Sales Region.
3. Click on the Product Cost field and drag it to the left of Quantity, drag Sales to the right of Quantity.
4. Rename Sales to Product Sales.
5. Click on Customer First Name and Customer Last Name and drag them to the right of the Country/Region fields.
6. Create 1 more Clean Step, go to the Flow and add another cleaning step, and remove the last column Region from the Fields.



7.

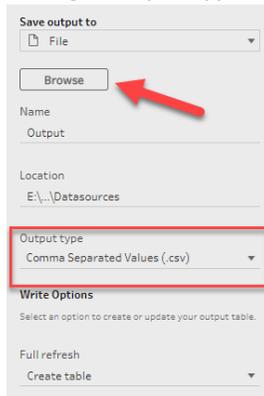
### Steps to create output file

1. Click on the plus sign to the right of the join icon (in the flow pane) and select output

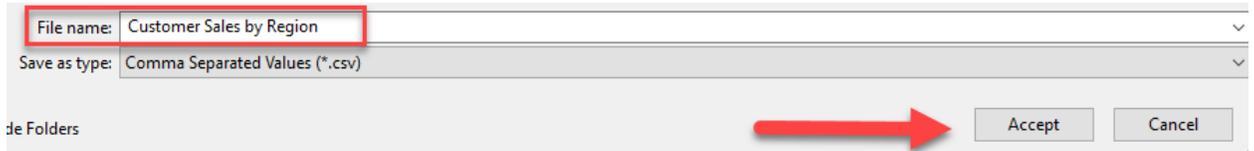


# Tableau Prep Builder Take Home Exercise

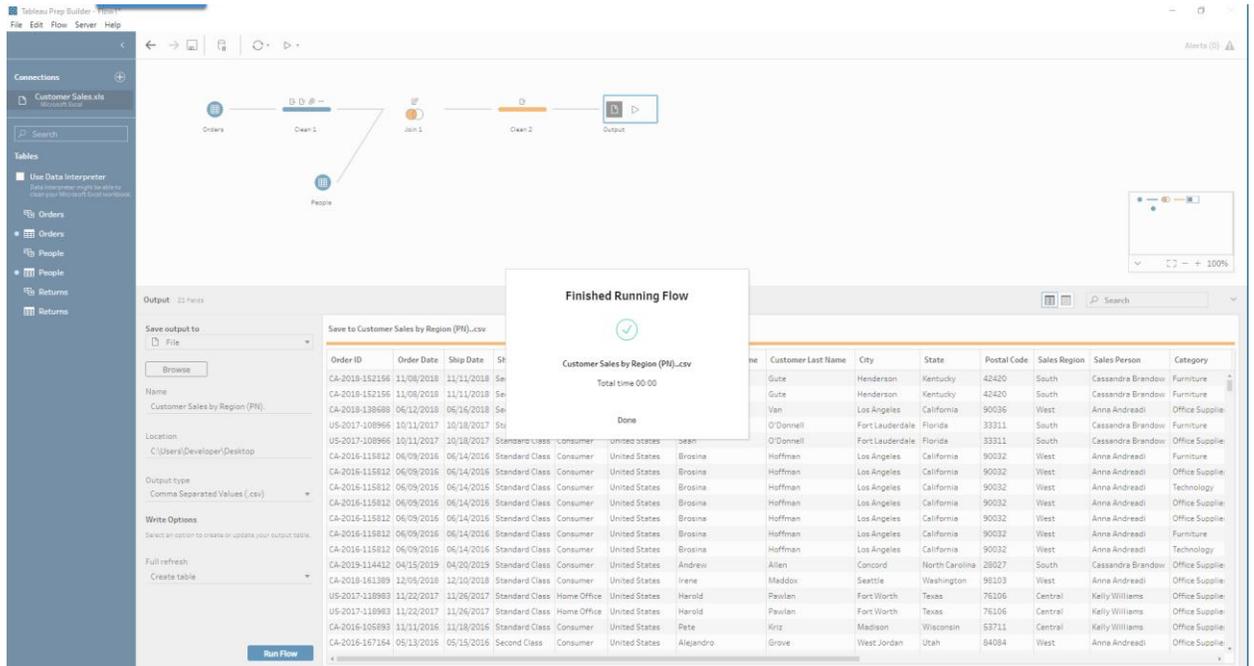
## 2. Change Output type to Comma Separated Values



## 3. Leave Save output to file, browse to your Desktop, change the name of the file to **Customer Sales by Region** and Accept



## 4. Run Flow



Provide me a screen shot similar to the one above and place it into the dropbox.