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| **Memorandum** | E:\Users\bergg\Documents\My Templates\Word\Accountancy\Accountancy\Accountancy_color_h.png |

To: 4320 Students

From: Gary G. Berg

Date: March 12, 2025

Re: Assignment 11 – Tableau Accounts Receivable Aging

* This assignment is Lab 6-1 Tableau
* Required:
  + Download the Excel file for this assignment
* Modifications
  + Create the following calculated fields
    - Days Past due (see exhibit on page 336)
    - Count of number of invoices **COUNTD([Invoice Amount])**
  + Create the aging bins (see page 337)
  + Create the following sheets
    - Sheet 1 - Crosstab with showing aging bins with invoice count and total $ receivables in each bin and grand totals (
      * Name the sheet **Aging**
    - Sheet 2 – convert sheet one to a **clustered column graph** (show mark labels)
      * **Name the sheet Aging Chart**
  + **Note: Sheets 3, 4 , 5 , 6, and 7 (Master the data)**
    - Sheet 3 – Crosstab showing the total number of invoices and total $ Invoice amount by customer. Sort on the $ invoice amount in descending order. Grand total should be shown.
      * Name the sheet **Customer**
    - Sheet 4 – Duplicate sheet three and modify the crosstab to list all customers and the number of invoices and total $ invoice amount they have in each aging bucket.
      * Include the appropriate totals/subtotals for each customer
      * Crosstab should allow user to **filter** by customer and aging bucket (make sure you show filter)
      * Name the sheet **Customer bucket**
    - Sheet 5 - Crosstab showing months with total invoice count and total $ invoice amount for each month and grand totals
      * Name the sheet **Month**
    - Sheet 6 – convert sheet five to a **clustered column graph** (show mark labels)
      * **Name the sheet Month Chart**
    - Sheet 7 - Crosstab listing all customers and the number of invoices and $ invoice amount they have in each month.
      * Include the appropriate totals/subtotals for the month(s) you filter on
      * Crosstab should allow user to **filter** by customer(s)and a specific month(s) (make sure you show filter)
      * Name the sheet **Customer by Month**
* **Reminder, Column graphs are vertical, bar graphs are horizontal**

1. To save your work, go to file > save as to **save the file as a twbx** (tableau packaged workbook) file.
   1. Failure to save file as twbx will result in **grade of zero**
2. **Additional Note: Make sure you submit the twbx file**
   1. Do not submit the temp file or a twb file(if you do, grade will be ZERO)
3. **Submit the completed Tableau .twbx** file via the D2L dropbox.: (**You are not submitting screenshots**)
   1. Files submitted to the wrong dropbox will receive a **grade of 0**
   2. Failure to follow directions will result in a grade of ZERO
4. This is **not a** group assignment. Students should work independently.
   1. **Copying/plagiarism** will result in a **grade of 0** for all parties involved.
5. **Due on 03-24-2025, 11:30 p.m.**
6. **Remember, file must be virus free**. (**Any assignment received containing a Virus receives a grade of 0)**