Builder Basics 101.1

Build a sales and cost analysis app for Delightful Mix

Last updated	February 2023
Level of Expertise	Basic
Target Time	30 minutes
Need help? Contact us	Set up a **1-1 training/onboarding** meeting or email **team@arithmix.com**
Want a copy of the app?	Open a completed app from ***here***.

Table of Contents

Exercise overview and test questions

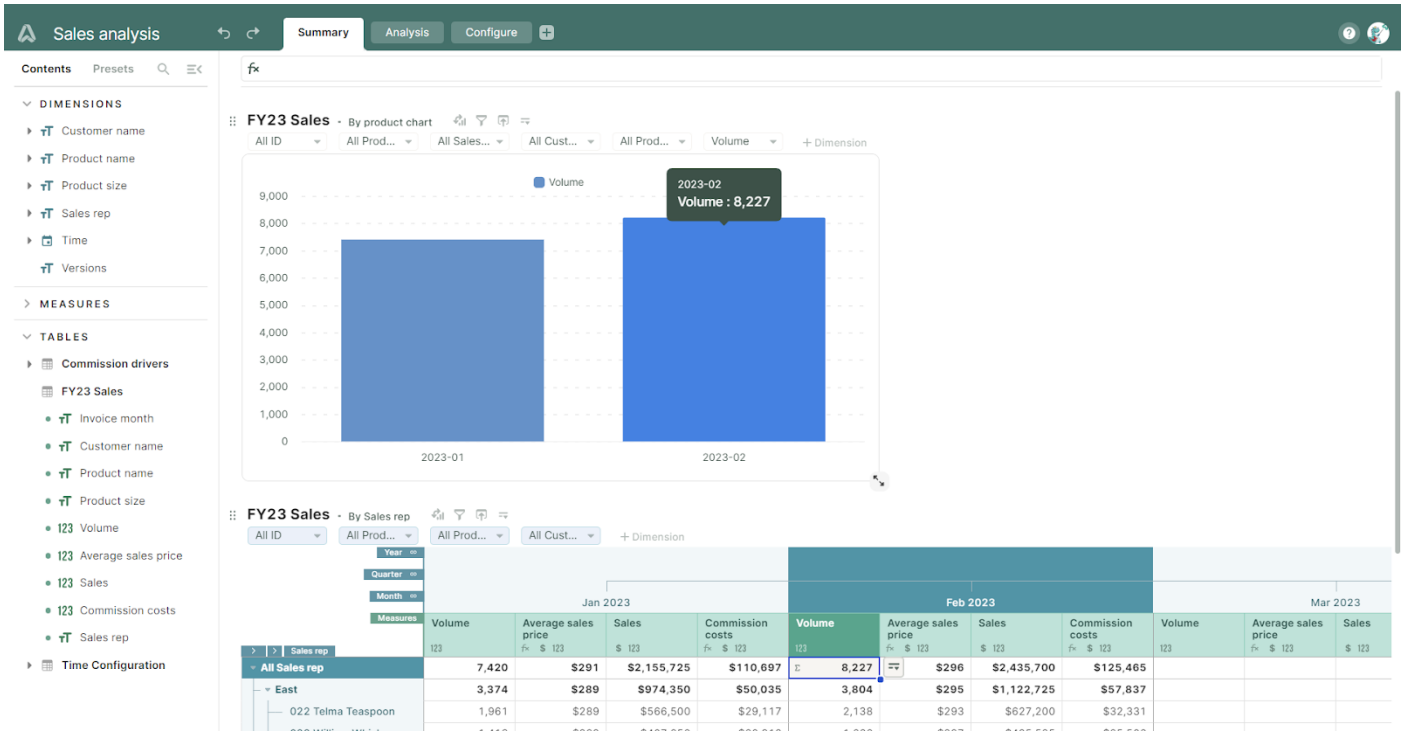
About Delightful Mix

Delightful Mix manufactures and distributes various flavors of ice cream and related equipment and services.

Our ice cream products are sold in a variety of sizes (Standard, Large and Extra Large) and are sold to customers grouped by their size (Enterprise, MidMarket and Small) and Region (East and West). Each customer has a sales rep, and sales reps are organized into either the field sales team (for Enterprise and MidMarket) or inside sales team (for Small).

Builder 101 exercise objective

You are tasked with analyzing ice cream sales and calculating sales rep commission for January 2023. Then update with February 2023 data. At the end of this exercise, you will have built this app:



Test questions

Which sales rep has the highest average sales price for XXL Extra Large total sales in January 2023?

Answer: Charles Cone

What are the total sales by the West team for product 102 Strawberry (all sizes) for January 2023?

Answer: $153,900

What are the total sales of product 100 Vanilla size XXL Extra Large for January 2023?

Answer: $120,600

What are the commission costs of total sales to our Artic customer in January 2023?

Answer: $18,149

What is the value of total sales by William Whisk for Q1 2023 to date (January + February)?

Answer: $903,375

Part 1 Set up the app and import into a table

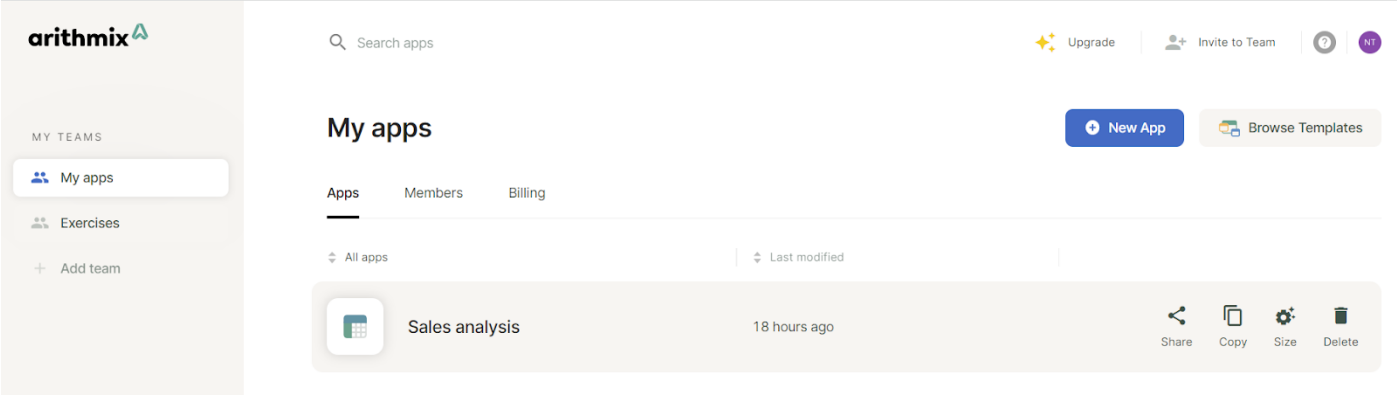
In this Part 1 your will learn:

- Adding a new team and app.
- Importing into a new table.
- The basics of dimensions and measures
- What is in the contents panel

Step 1: Set up the Sales analysis app

Add a new team and your Sales analysis app

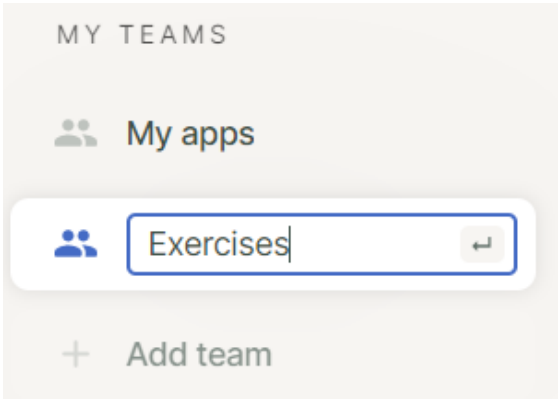
In your Home, add a team where you will build your exercise app(s). You can copy apps from one team to another.



Step 1 - Set up a team, add and name the new app

(1) Add team for exercises

In Home, click + Add team and rename (double left-click or right-click on the team name to open the context menu).

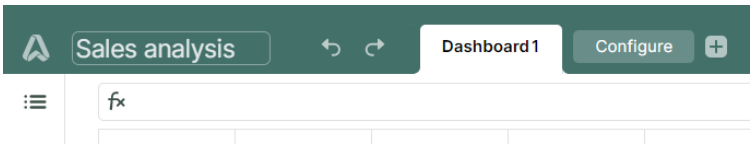


A team has members with permissions that you'll set for them as the Owner of the team.

To invite members to the team so they can access the apps, use Invite to Team .

(2) Add new app and update the app name

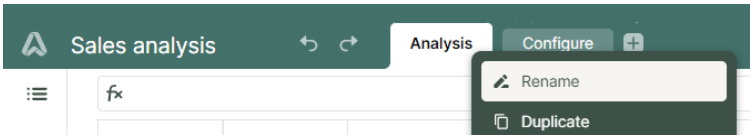
Click New App to add your app. Double left-click into the app name to update the default to Sales analysis.



You can rename apps in Home via right-click on the app name to open the context menu.

(3) Rename dashboard

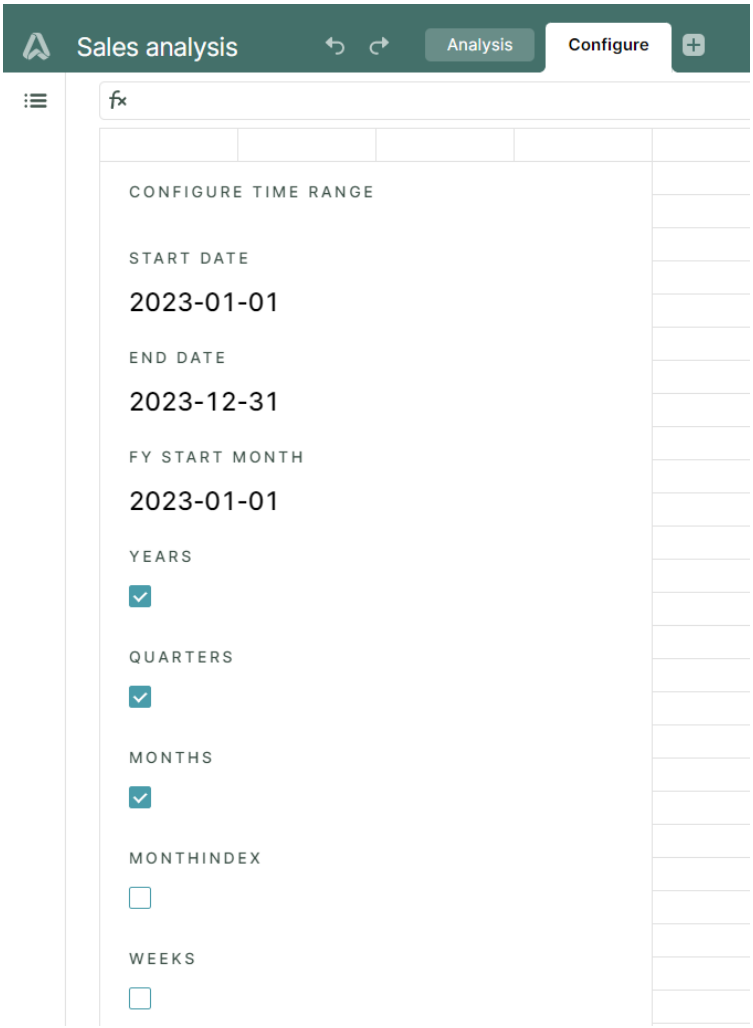
rename Dashboard1 to Analysis (double left-click or right-click on the team name to open the context menu).



Before you start working with the app, review the Configure dashboard.

Note the default time range for the app reflects a 2023 fiscal year by month.

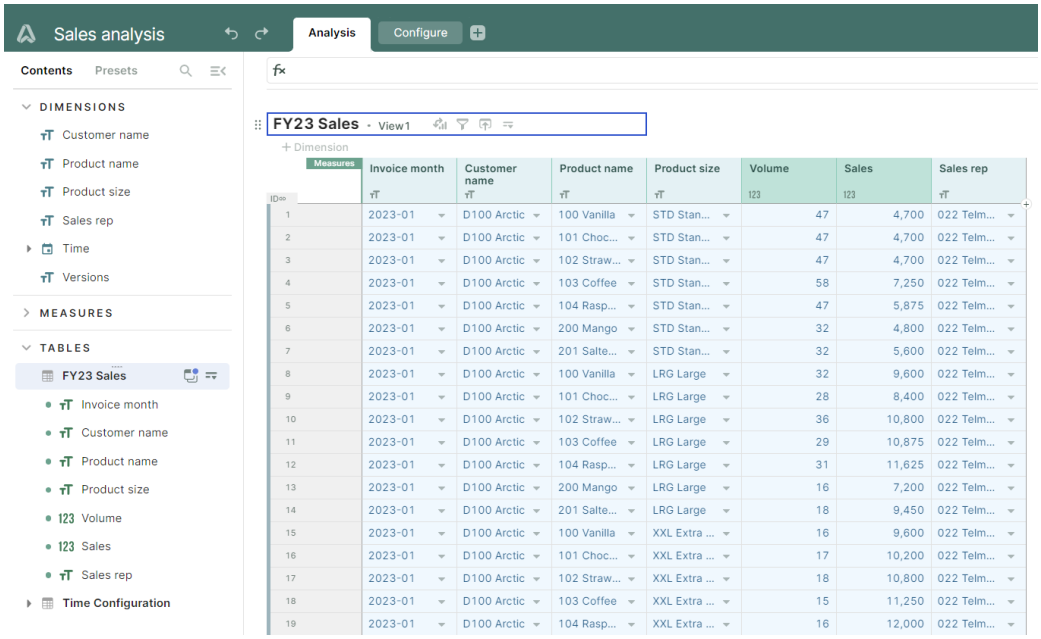
When using your data, update to your preferred time range and level (if you import data with time outside the range, the app will check and allow you to update dynamically).



Step 2: Add a new table, import and set up your dimensions and measures

Build a multidimensional table from your external data source.
Review dimensions, measures and tables in the Contents panel

The table will store imported sales data and as we import we'll confirm what data are values or will be used to create dimensions. Later, we'll extend the table for our analysis.



Step 2 - Import into a new table and confirm the values and dimensions of that data

*The **January 2023 sales from CRM** CSV file looks like this (with highlighted green columns that are values, the blue columns will be used to create dimensions):*

	A	B	C	D	E	F	G	H
1	Invoice number	Invoice month	Customer name	Product name	Product size	Volume	Sales	Sales rep
2	INV001	2023-01	D100 Arctic	100 Vanilla	STD Standard	47	4700	022 Telma Teaspoon
3	INV001	2023-01	D100 Arctic	101 Chocolate	STD Standard	47	4700	022 Telma Teaspoon
4	INV001	2023-01	D100 Arctic	102 Strawberry	STD Standard	47	4700	022 Telma Teaspoon
5	INV001	2023-01	D100 Arctic	103 Coffee	STD Standard	58	7250	022 Telma Teaspoon
6	INV001	2023-01	D100 Arctic	104 Raspberry ripple	STD Standard	47	5875	022 Telma Teaspoon
7	INV001	2023-01	D100 Arctic	200 Mango	STD Standard	32	4800	022 Telma Teaspoon
8	INV001	2023-01	D100 Arctic	201 Salted caramel	STD Standard	32	5600	022 Telma Teaspoon

During the import we will:

- *Discard invoice number (not needed)*
- *Confirm Invoice month (time), Customer name, Product name, Product size and Sales rep are dimensions (the lists of like-items you use to analyze the values, by customer, by product name and size, by sales rep, by month). To learn more about dimensions go **here**.*
- *Confirm Volume and Sales are measures (the values of data to be analyzed). To learn more about measures go **here**.*

In the current release of Arithmix:

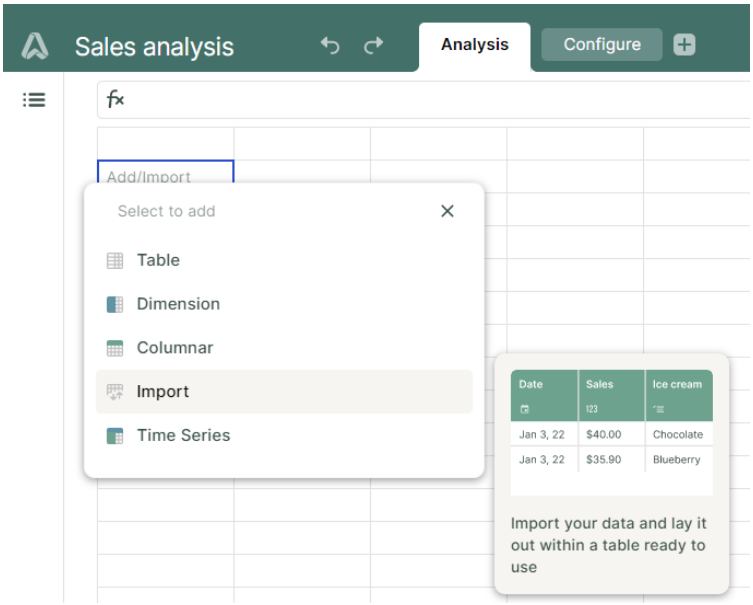
- Dimensions of like-items are limited to summary calculations like subtotals and totals of the dimension items (e.g. sales reps subtotal to sales teams which total to all sales reps/teams).
- The measures dimension hold all values - data entry, calculations and functions - by the dimensions.

(1) Add a table using import

In the grid, click Add/Import and select Import.

Browse to the location of the **January 2023 sales from CRM** CSV file (download from ***here*** if needed) and open it.

The Import method will auto-filter to CSV file types.



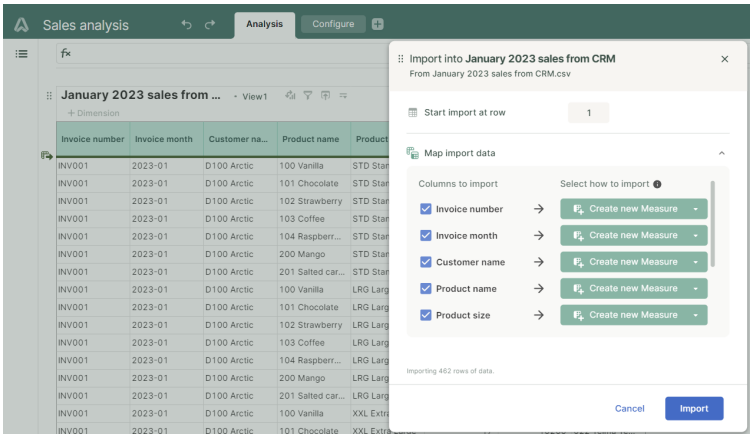
The import popup will appear with a preview of the CSV file. Expand

Map import data

to open the map import data options. By default in a new import, all columns start as measures.

We will map our dimensions and measures here as they import.

You can create and link to dimensions from measures at any time in app building.

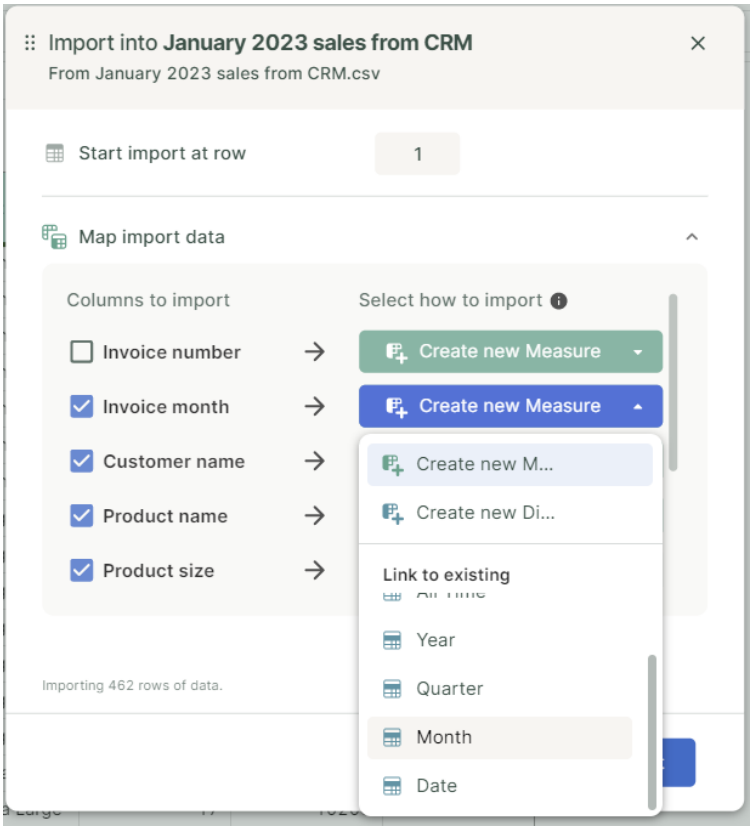


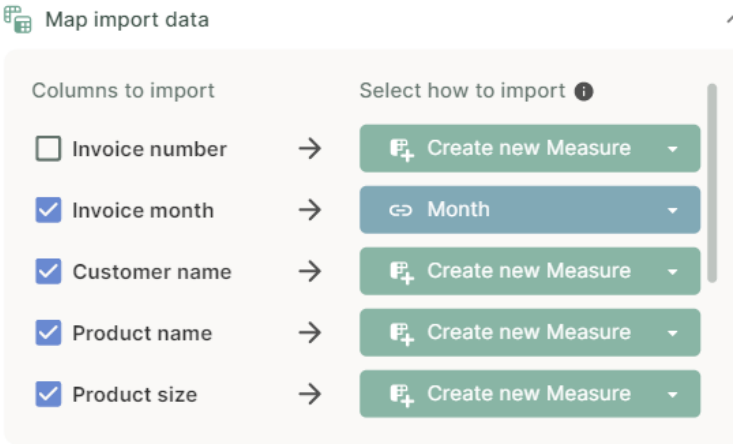
(2) Confirm the CSV file start import row, deselect unwanted columns and select how to import (a column is dimension or a measure)

In the import popup you will:

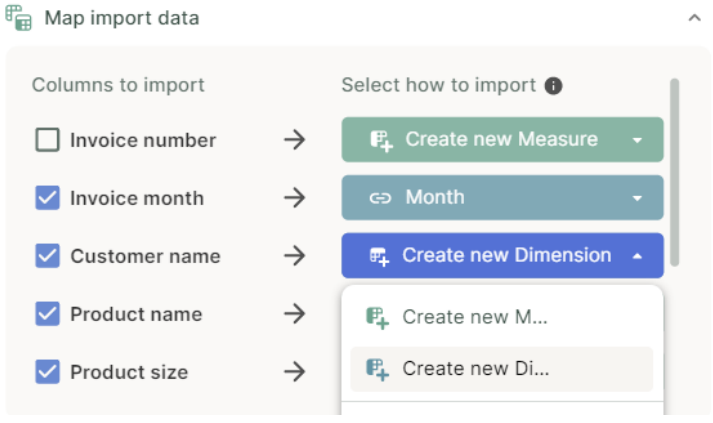
- Confirm the start import at row. This count positions the first row to import after headers (no action needed, see the default 1 and in the grid preview of the table).
- Deselect Invoice number (not needed) by left-click unchecking from .
- We will take advantage of the existing Month (time) dimension (the time range in the Configure dashboard) by linking Invoice month.

  Left-click Invoice month Create new Measure to open the how to import options for this column. Scroll down the link to existing area, left-click the Month dimension. The select how to import will update to Invoice month → Month.





- The import will be used to create dimensions for Customer name, Product name, Product size and Sales rep. Left-click each and update to Create new Dimension.



These measures are now able to be displayed and worked with as Dimensions (they are no longer values).

- The Volume and Sales columns are values and will remain 

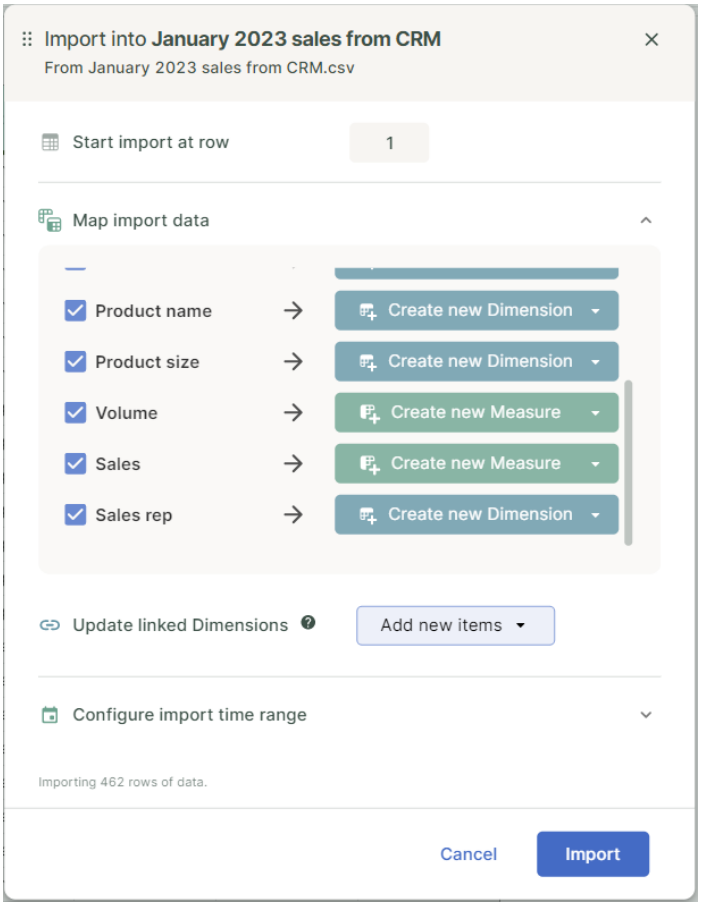
- Accept the default 

update option and click 

when ready.

The Update linked Dimensions options are:

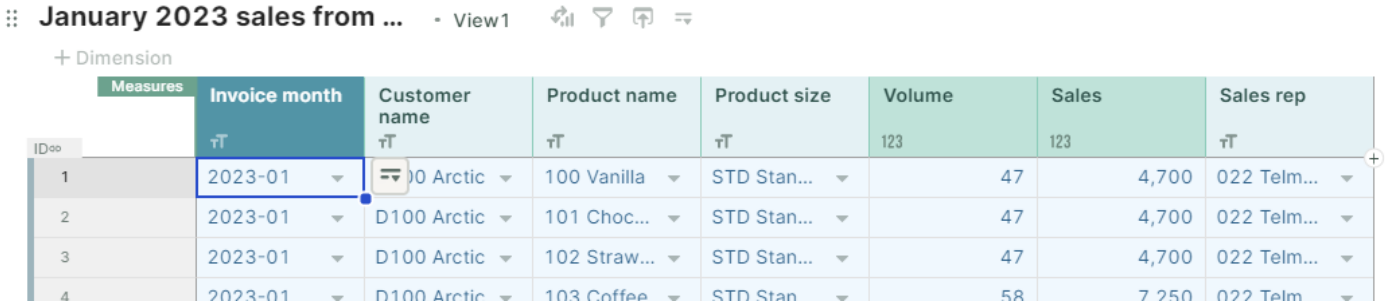
- *Add new items. Update the dimensions with all new items from any future import.*
- *Replace data in. Clear all items and execute a fresh import.*
- *Do not update. Do not update with new items from a future import.*

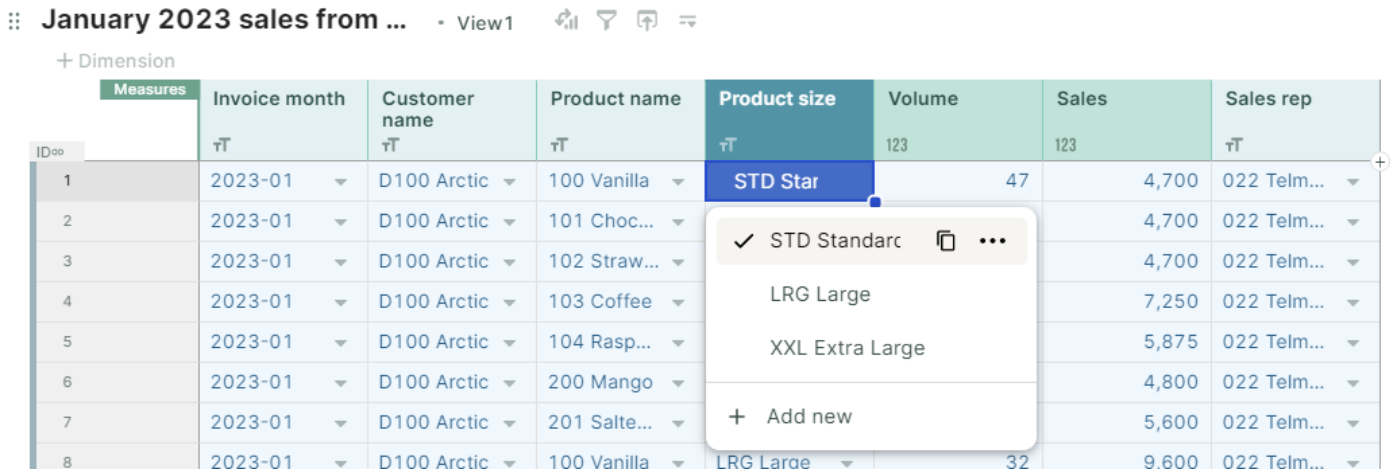


(3) Review the table

The table is auto-named using the import file name and an ID dimension is added (the ID dimension identifies each unique row (in this case each transaction on the invoice).

Note the header colors differentiate the columns that are measures which are values (Volume and Sales) and those that are now linked to a dimension (Invoice month, Customer name, Product name, Product size and Sales rep).

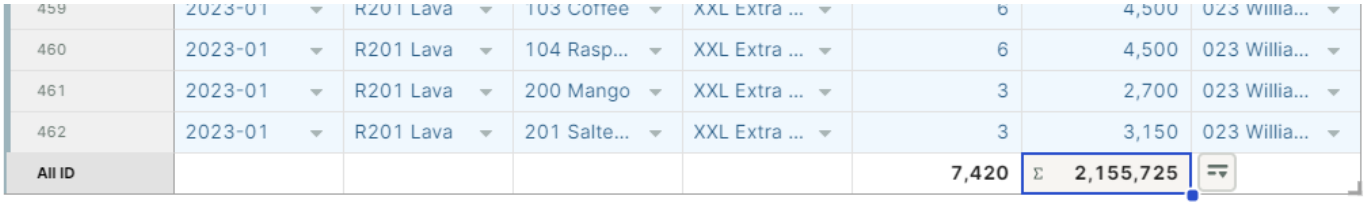




The measures linked to a dimension have a dropdown, which holds all the potential items for that dimension.

Missed something? You can always undo!

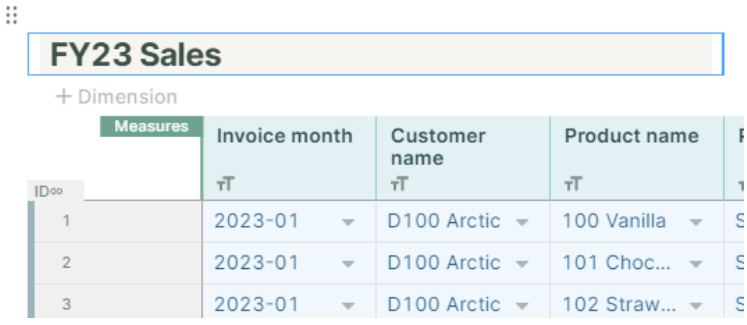
The ID dimension will auto-total numeric columns.



You have now converted the import file into a powerful multidimensional table for your FY23 Sales data.

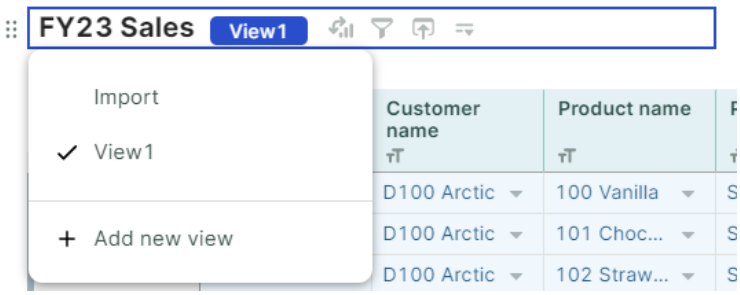
(4) Rename the table to FY23 Sales and review table views

Double left-click the table title, rename to FY23 Sales.



The table has 2 views:

- View1, the current view.
- Import, which can always be referred back if needed (or can be deleted).



(5) Open the contents panel

Left-click to expand the contents panel (will close contents to maximize grid size).

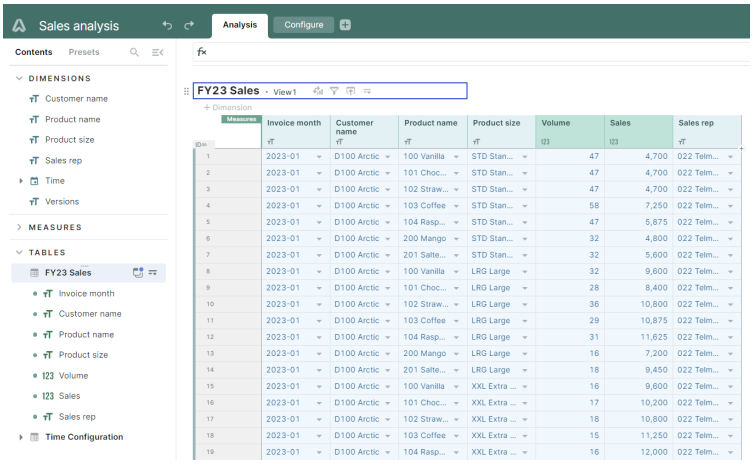
You can see our app's dimensions, measures and tables.

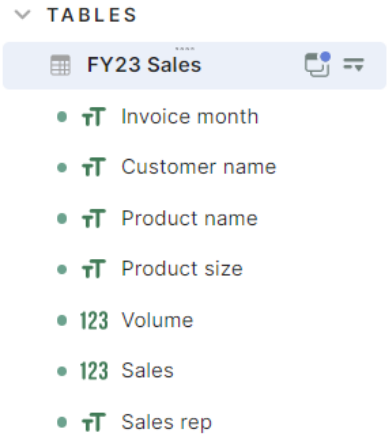
Only global measures that appear in multiple tables (or that you promote) will appear in the measures section of contents. Measures that appear once are called local measures and live under their table.

We can search, expand and drag these contents into the grid to update, rename and reuse.

Expand FY23 Sales table to display the dimensions and measures.

We'll pivot these into rows, columns and pages, and add hierarchies next.





You have completed Part 1, where you:

- Added a new team and app.
- Added a table using import, and used that import to create measures that are dimensions or values.
- Reviewed the contents panel.

Part 2 Working with dimensions, measures and tables

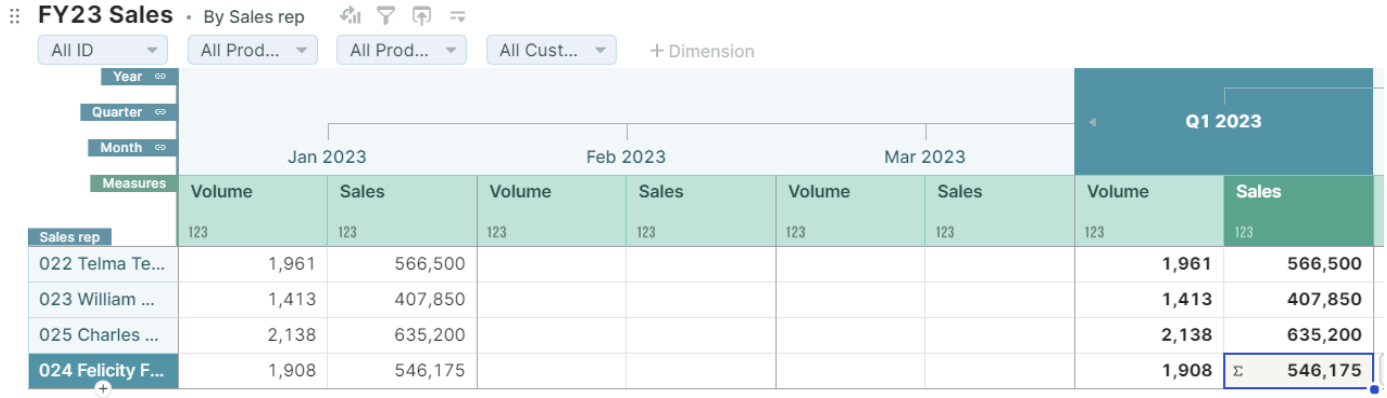
In this Part 2 your will learn:

- Moving (pivoting and slicing) dimensions to rows, columns or pages.
- Adding summary levels to subtotal and total your data.
- Adding a calculation measure.
- The basics of table views.

Step 3: Analyze FY23 Sales with a By Sales rep view

Build the By sales rep analysis table view by moving dimensions and adding All total levels

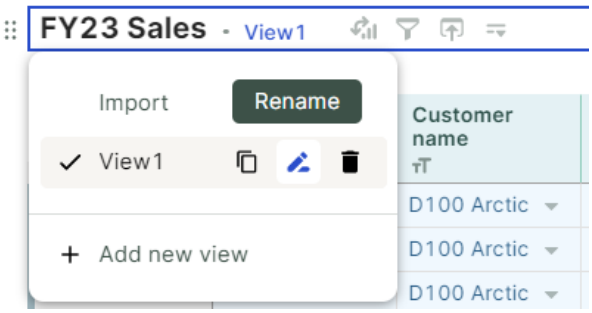
The FY23 Sales table is now ready to be used for new views and analysis. We will layout By Sales rep (in rows), by time (in columns) and view by Customer name, by Product name and size with totals (in pages).



Step 3 - Build a By Sales rep view of sales to all Customers, by all Product names and sizes

(1) Rename the table view from View1 to By product

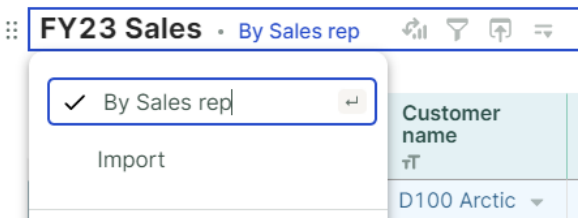
Left-click View1 and rename View1 to By Sales rep.



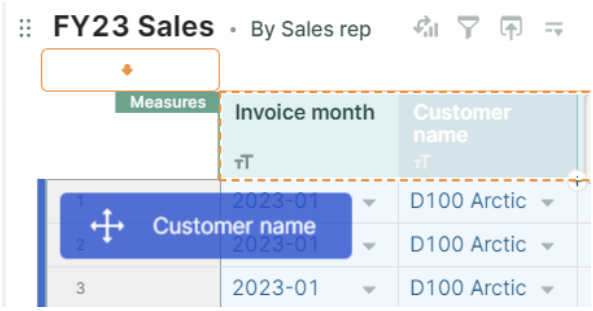
Tables can have as many views as you need to solve for different tasks such as data entry, detailed and summary reporting, and displaying key metrics.

(2) Move dimensions to rows

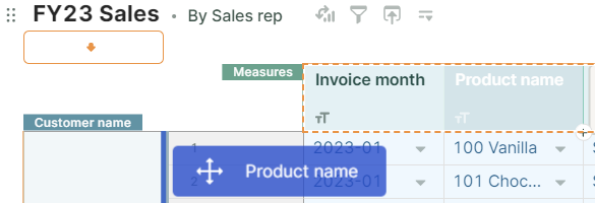
Left-click and hold the Customer name dimension and move to rows.



Repeat for Product name.

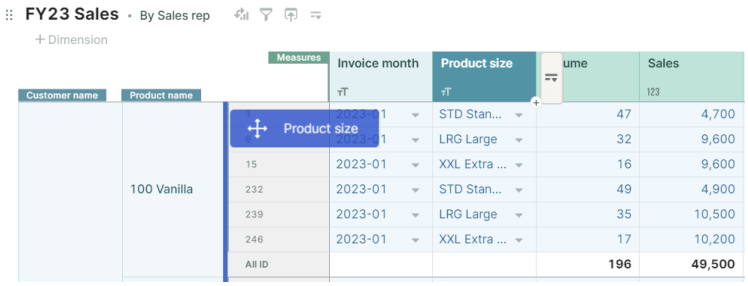


Repeat for Product size.



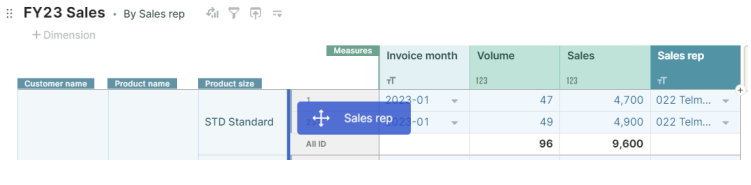
Finally, repeat for Sales rep.

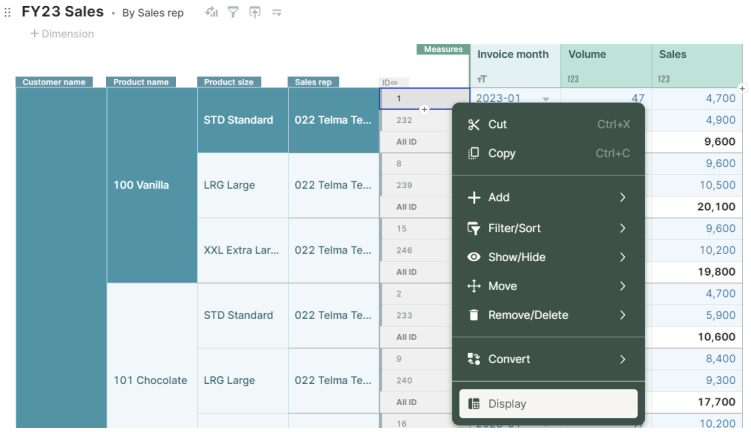
Context menus are always available. Right click Product size dimension and explore to see options including add, move, show/hide, format and display (we'll use this menu later).



(3) Tidy ID dimension to display All ID total only, then move to pages

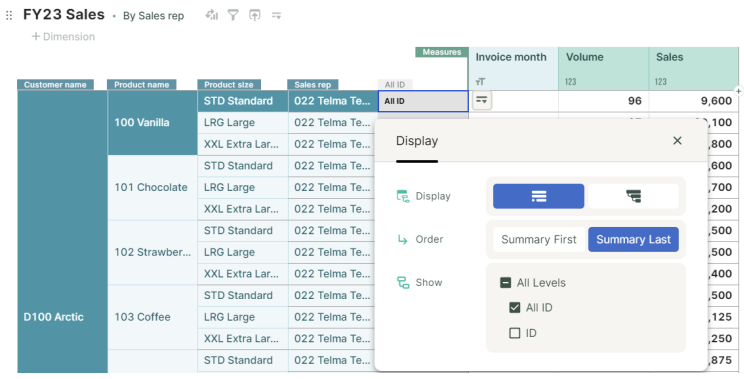
Right-click on the ID dimension and select display.



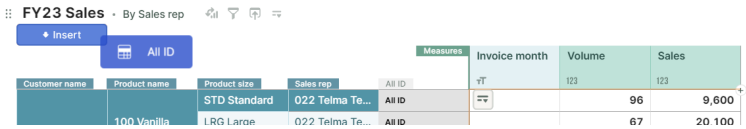


In display ☐ uncheck ID to show ☑ All ID level only.

The ID dimension has only 2 levels. each transaction (ID) and the total (All ID).

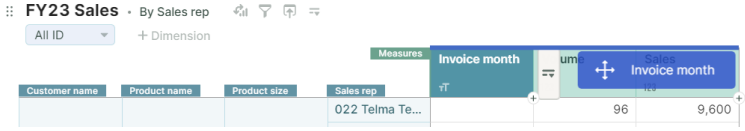


Left-click on the All ID ID dimension header and drag to pages.



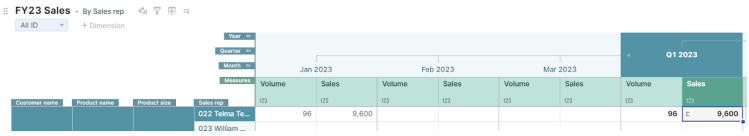
(4) Move Invoice month dimension to columns

Left-click and hold the Invoice month dimension and move to columns.



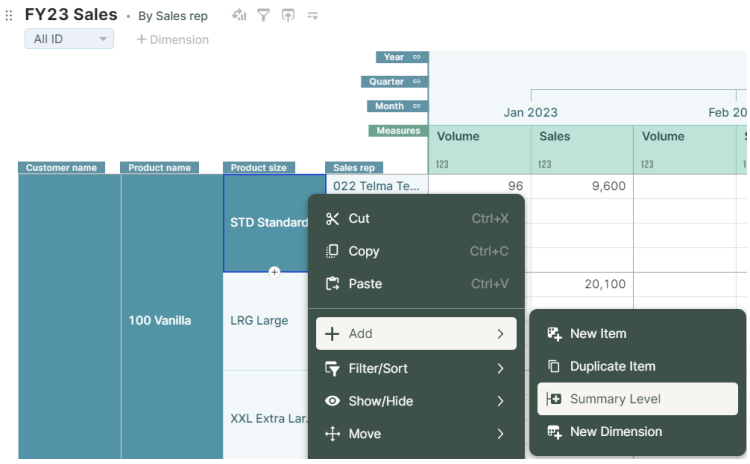
Because we linked Invoice month to the time range, the dimension displays quarter and year totals (levels).

The imported transactional data, now viewed by dimensions, is fairly sparse. For example only Telma sells to our Artic customer, so there are blank intersections.



(5) Add a summary All totals level for the Customer name, Product name and size dimensions, update display to show their All totals level first, and then move to pages

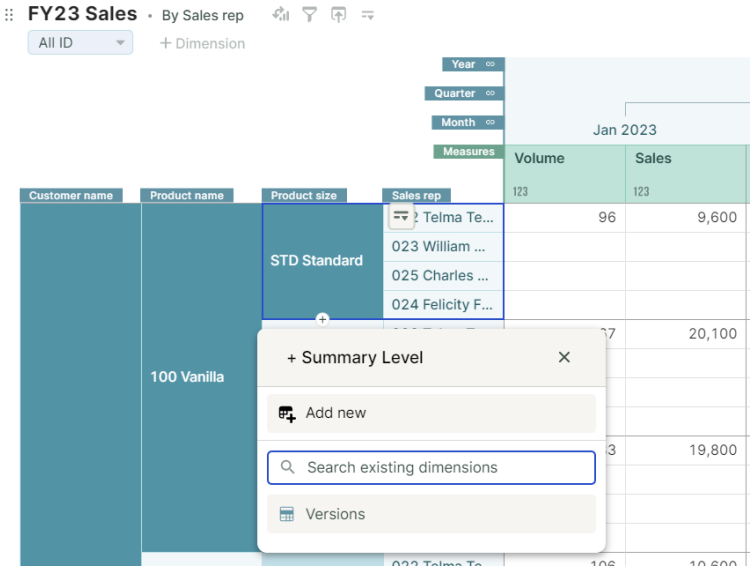
To add All totals to Product size, right-click on the dimension and add, then summary level.



Left-click Add new and the All Product size total level will be added.

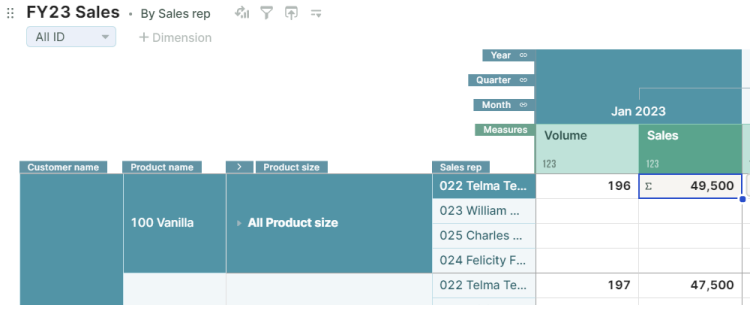
We could have leveraged an existing dimension for adding levels. This is useful for combining dimensions into a single hierarchy (e.g. location, city, state, country).

*To learn about combining dimensions to build hierarchies go **here**.*



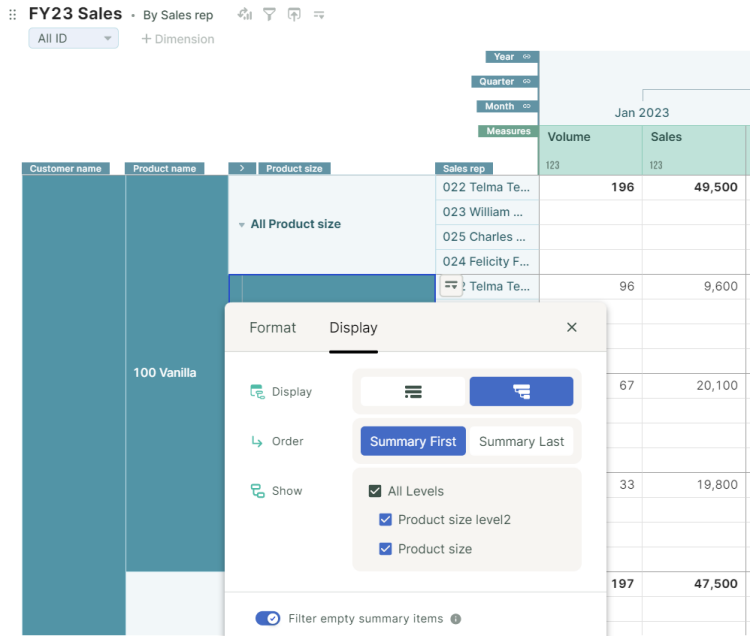
By adding the level, our dimensions have expanded into a tree view from the default list view.

You can left-click to collapse a level. In this view we've collapsed All Product size. Left-click to expand.



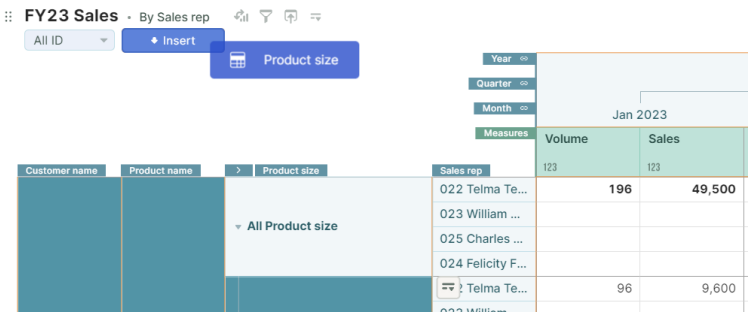
To order the All total level first, right-click Product size and display order Summary First.

Summary last (default) orders totals at the bottom. Summary first orders a dimension's totals at the top.



Then left-click and hold Product size

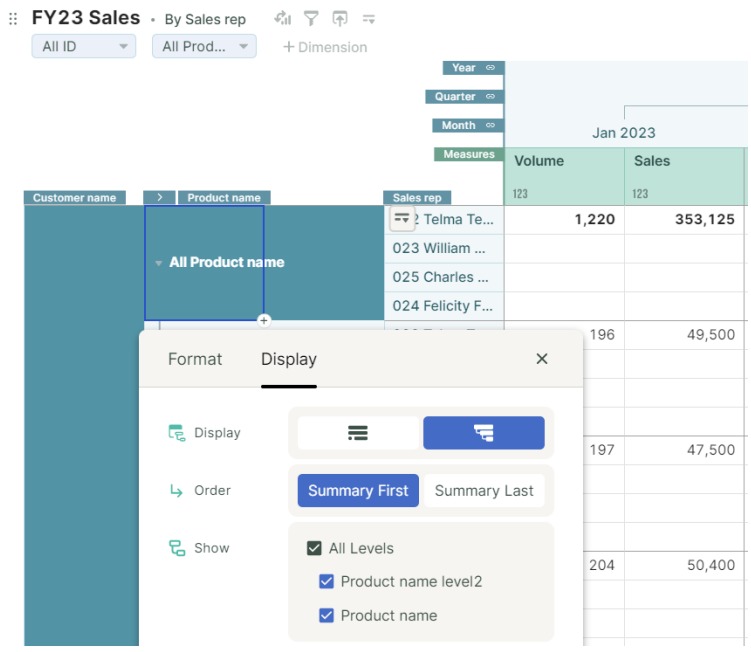
and move pages.



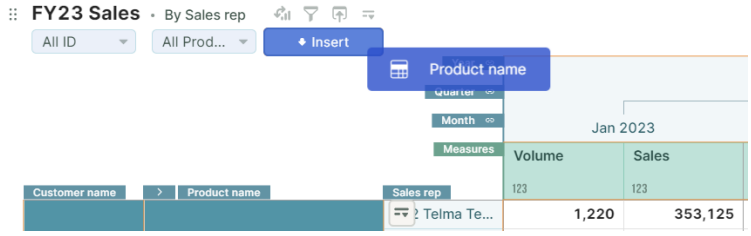
Repeat for Product name. Right-click and add, then summary level.

Left-click Add new and the All Product name total level will be added.

Right-click Product name and display order Summary First.



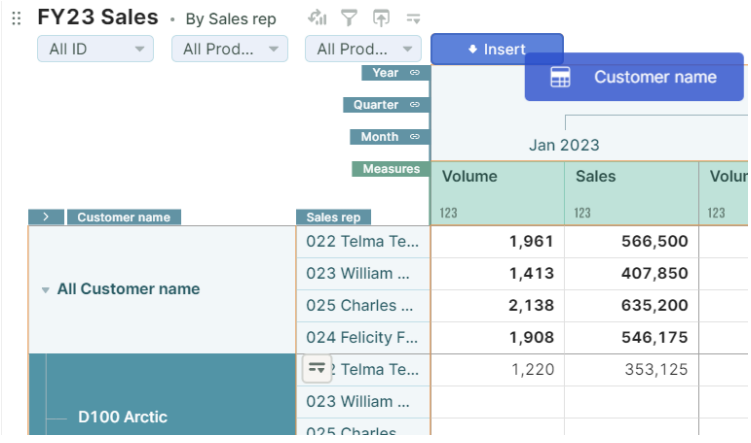
Then left-click and hold Product name and move pages.



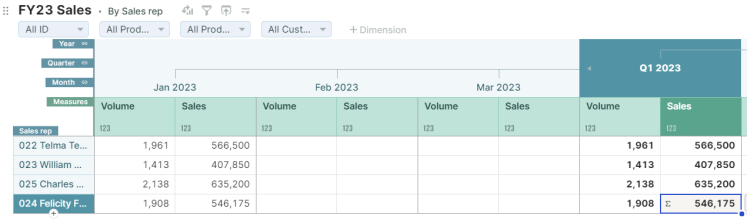
Repeat for Customer name, add the summary level with Add new for the All Customer name total level.

Order the All Customer name level first by display order Summary First.

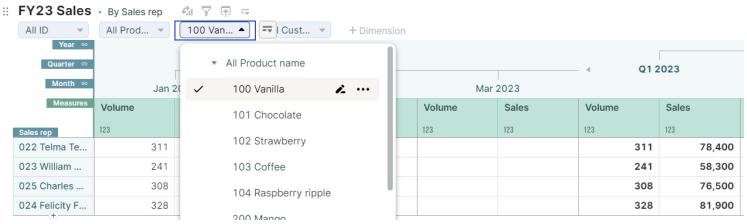
Then move pages.



The table view is now volume and sales by Sales rep by time, with the All totals level in pages for Product size, Product name and Customer name.



By using the page drop downs we can select other views. For example, select Product name and 100 Vanilla only.

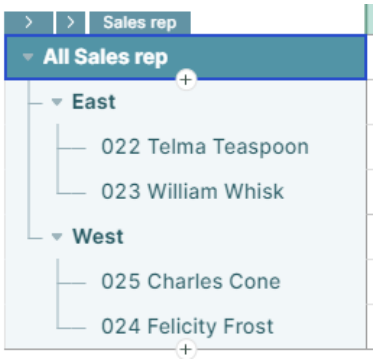


We now know how to add a single All totals summary level. Next we will build a multilevel hierarchy for our Sales rep and team dimension.

Step 4: Build the sales team hierarchy levels for Sales reps

Work with summary levels to group sales reps into their teams

Our sales reps work in either the East or West sales team, which then consolidate to an All Sales reps total. We will expand the By Sales rep view to analyze the sales team and all sales rep performance.



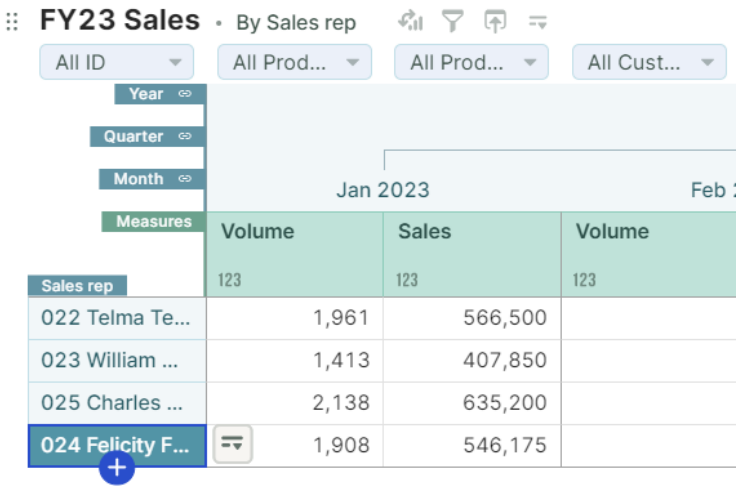
Step 4 - Build the sales rep team hierarchy

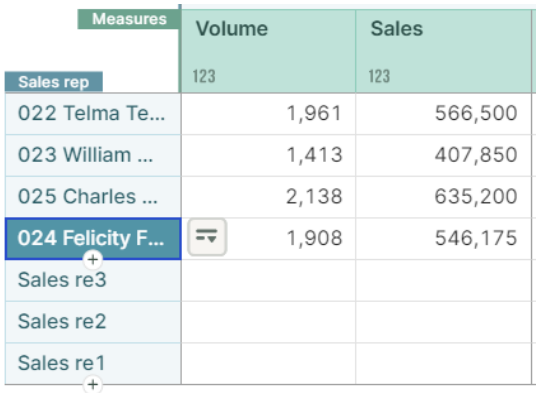
(1) Add new items for the team hierarchy for Sales reps and All totals level

Another way of adding levels is by using ⊕ to insert new items into a dimension.

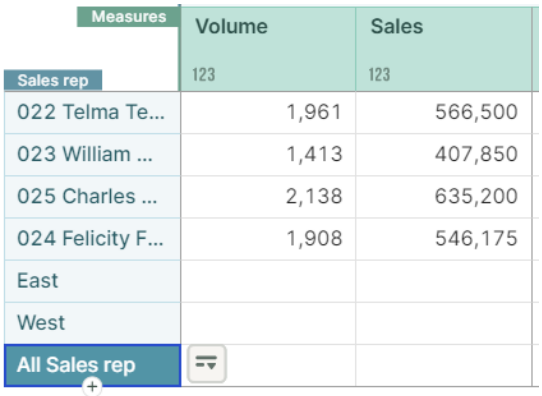
Left-click ⊕ below Felicity to add 3 new items.

New items (Sales re1...) inherit a default name from the dimension.





Then (by double left-click or F2) rename them East (Telma and William are in this team), West (Charles and Felicity) and All Sales reps (the total of East and West).

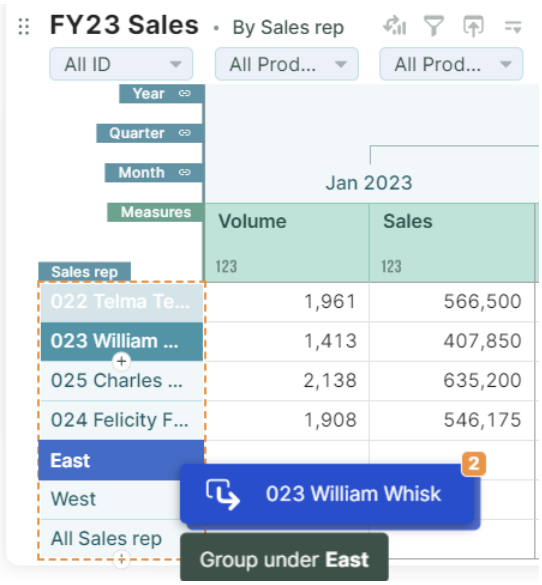


(2) Group sales reps into their teams

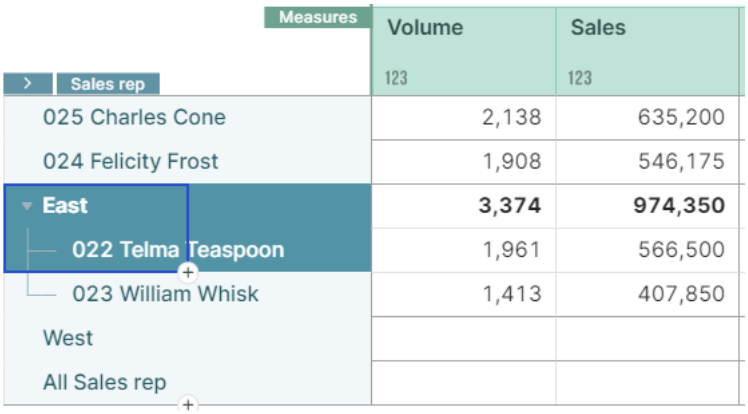
To group Telma and William into East, left-click Telma and Shift left-click William, then drop onto East.

Dimension items (1 or more) can be reordered into new positions or grouped under levels.

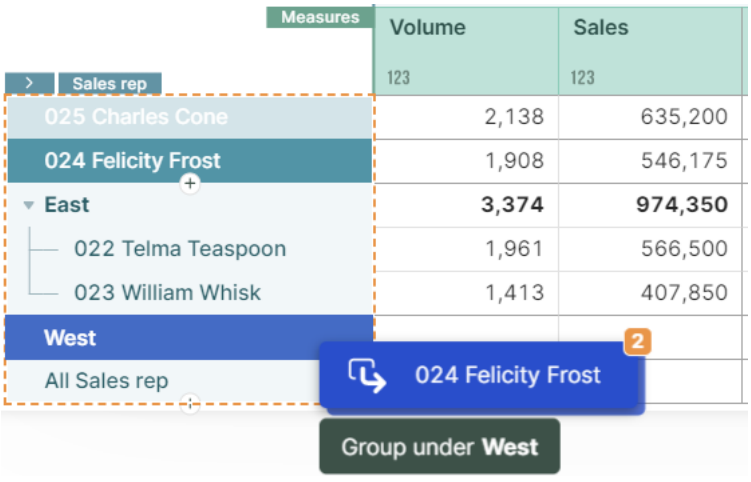
Depending on your data, a dimension item at the new hierarchy level will appear (could be used for entering adjustments). You can hide this item if not needed.



East will now total Telma and William's volume and sales numbers.

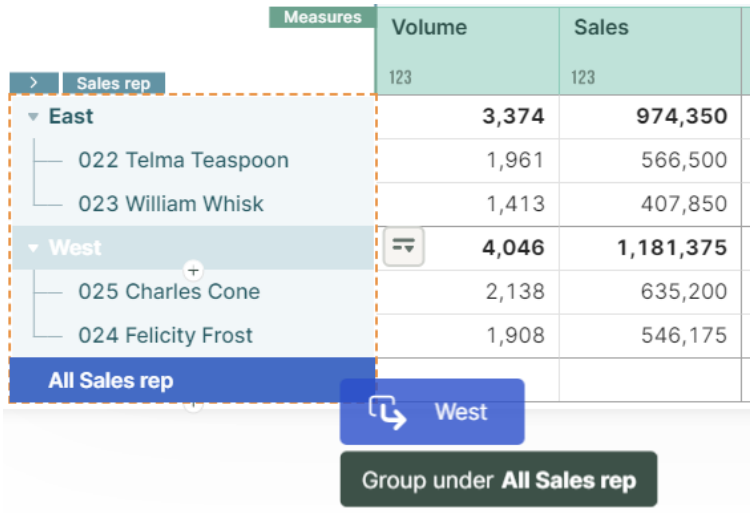


Left-click Charles and Shift left-click Felicity to group onto West.



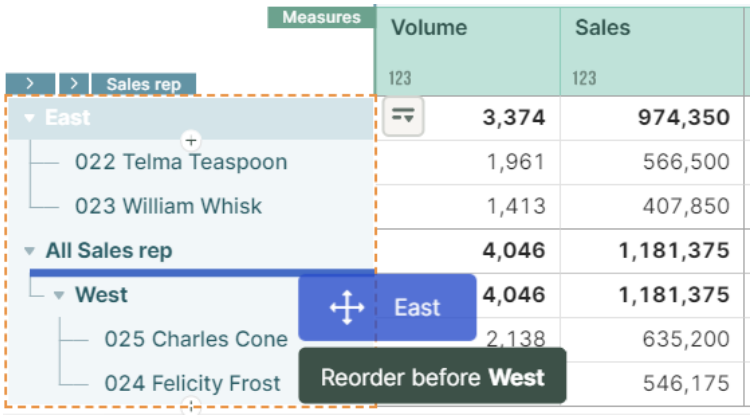
(3) Group sales teams into the All totals level

Then left-click and hold to drag and group West under All Sales rep.



Finally, drag and group East under All Sales rep.

The blue drop indicator line needs to be positioned in line with West's hierarchy level.

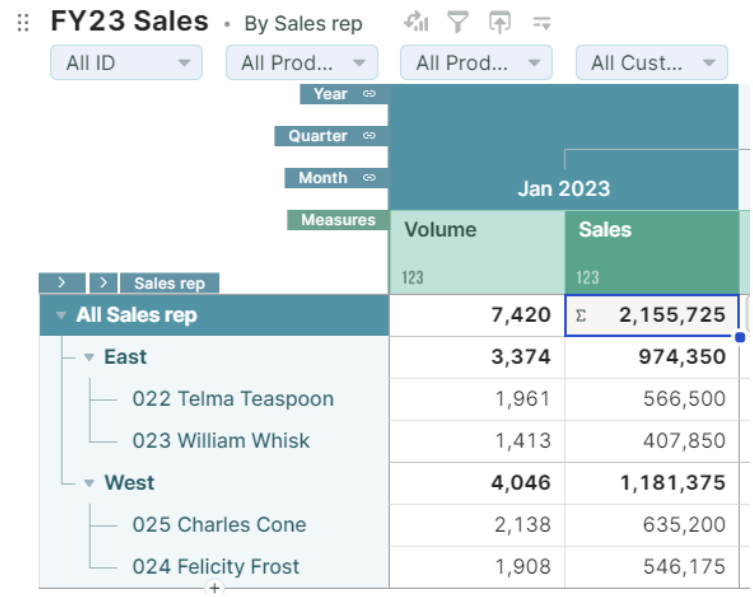


The Sales rep team hierarchy is now built. We can add additional reps (via import or manually) and the hierarchy will update.

We've added levels and hierarchies using and grouping, or summary level.

The table view is now complete. We can analyze by volume and sales Sales rep and sales team by time, by Product size, Product name and Customer name.

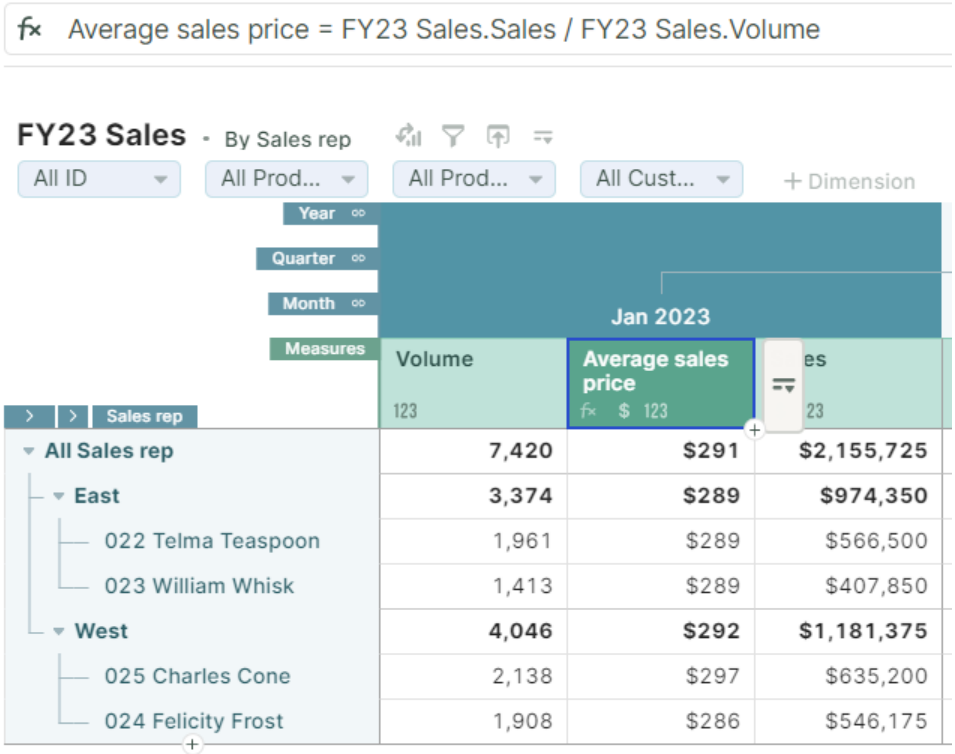
We can add additional measures into the table to extend the analysis.



Step 5: Add a calculation measure into the table

Introduction to calculation measures and functions including autocomplete and formatting

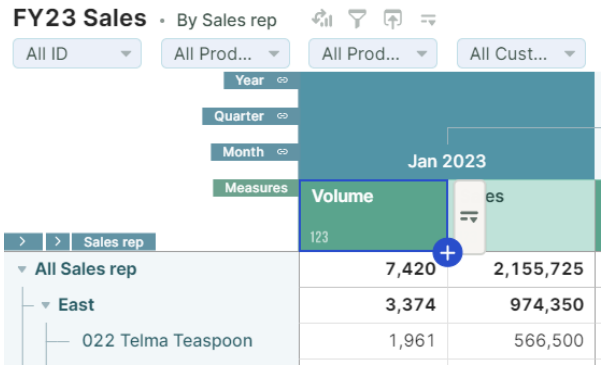
To extend our analysis, we need to calculate the average sales price.



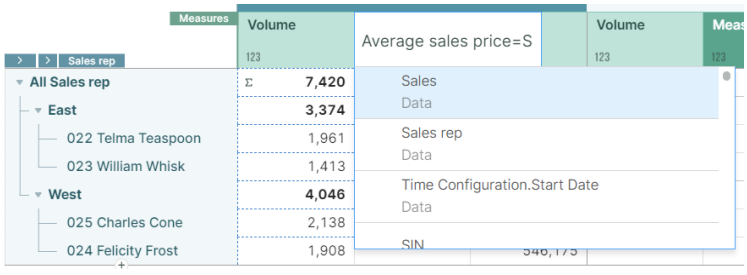
Step 5 - Build the Average sales price calculation measure

(1) Add a new measure for average sales price

Left-click the Volume measure, hover over to prompt, then left-click ⊕ add a new measure (or right-click on volume to open the context menu and + add measure).



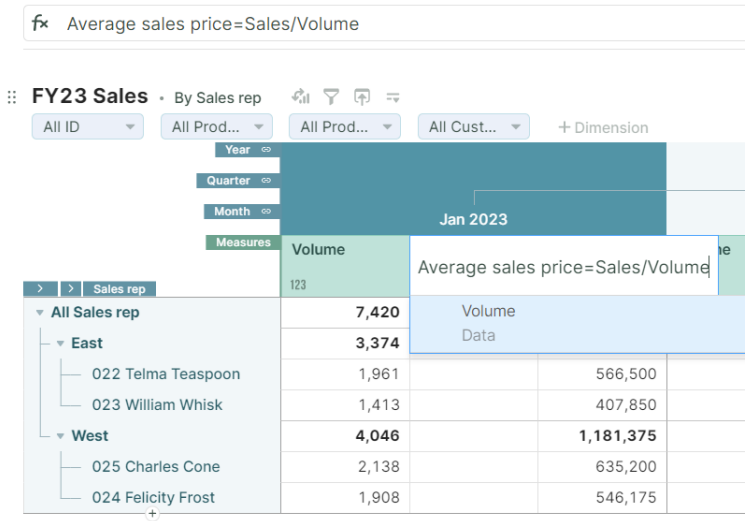
Left-click on Measure1 and build the calculation. We can update the new Measure1 and ✎ rename Average sales price while building the calculation ***Average sales price=Sales/Volume***.



💥 *The autocomplete will assist in finding the measures you need.*

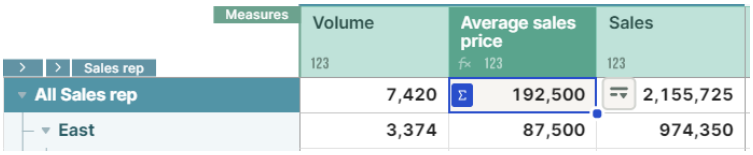
You can also select Sales and Volume measures using left-click.

The fx bar populates with the calculation. You can build (and edit) calculations in the in fx bar (including left-clicking to select measures for the calculation).



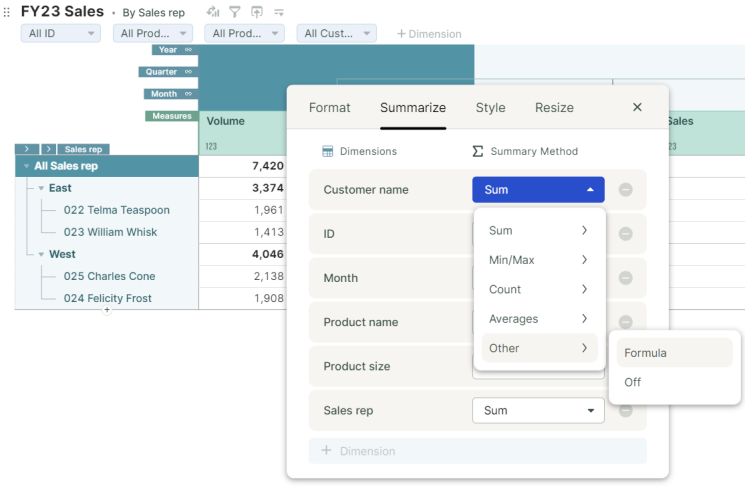
(2) Summarize average price to a weighted average,

The average price is showing the All totals (sum) for the dimensions.



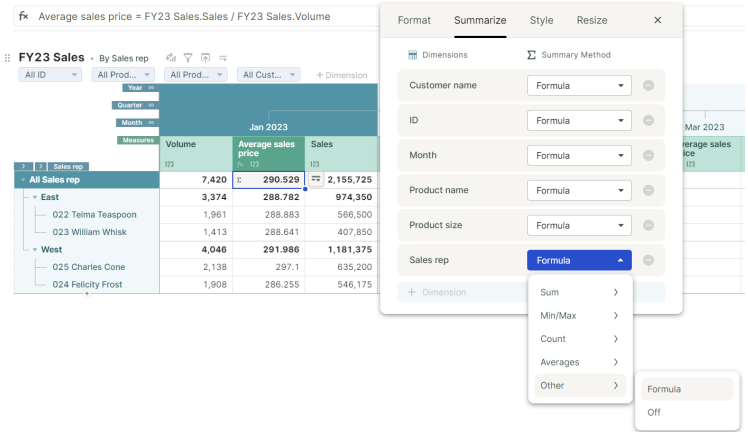
To calculate the weighted average left-click Σ summarize in a measure cell.

Summarize confirms how the measure will calculate at a summary level such as All totals.



You can right-click the measure and use Σ summarize from the context menu.

Select the Formula (weighted) summary method from the default Sum.



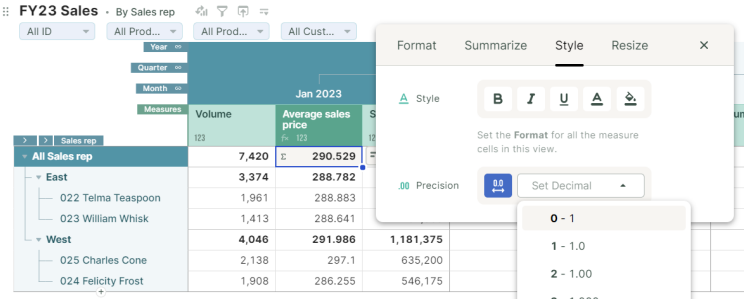
You can drag and drop the popup around the screen.

Other summary methods include last, first (for headcount) min, max, count, and average (mean, median). Once updated, every table view will display the correct average sales price for all dimension combinations.

The Format, Summarize, Style and Size measure options are combined into a single popup.

(3) Style average price measure to zero decimal places

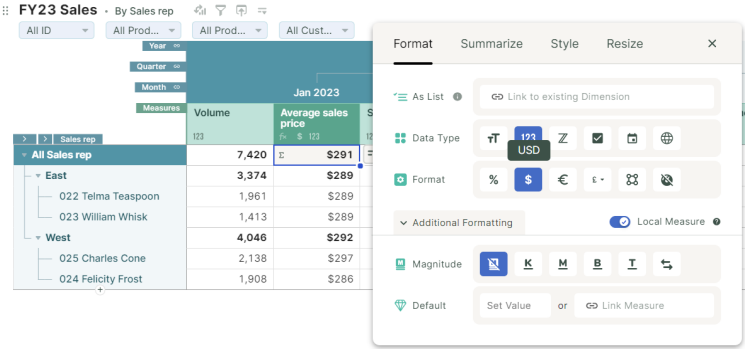
If the measure popup is open, left-click Style and update precision to 0 - 1 zero decimal places.



You can right-click the measure and style from the context menu.

(3) Format average price to $

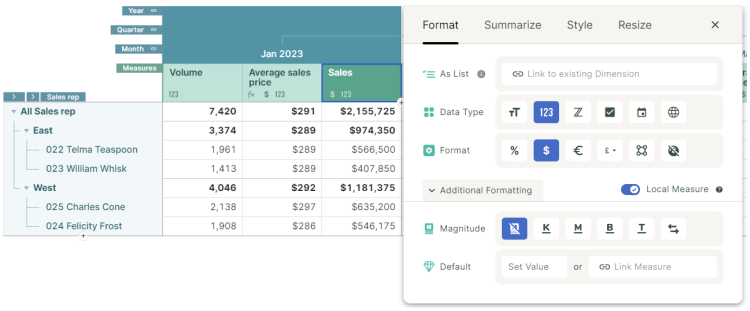
If the measure popup is open, left-click Format and update to $.



You can right-click the measure and format from the context menu.

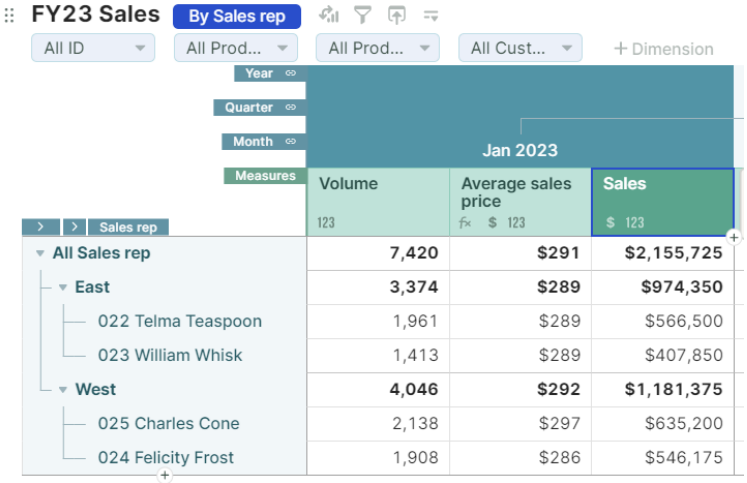
(4) Format the Sales measure to $

Repeat Format update to $ for Sales.



You have completed the By Sales rep (and team) table view for analyzing January 2023 sales.

February and future months dimension items and measures will update with each new product sales import.



Work with the table view to answer what are the total sales by the West team for product 102 Strawberry (all sizes) for January 2023?

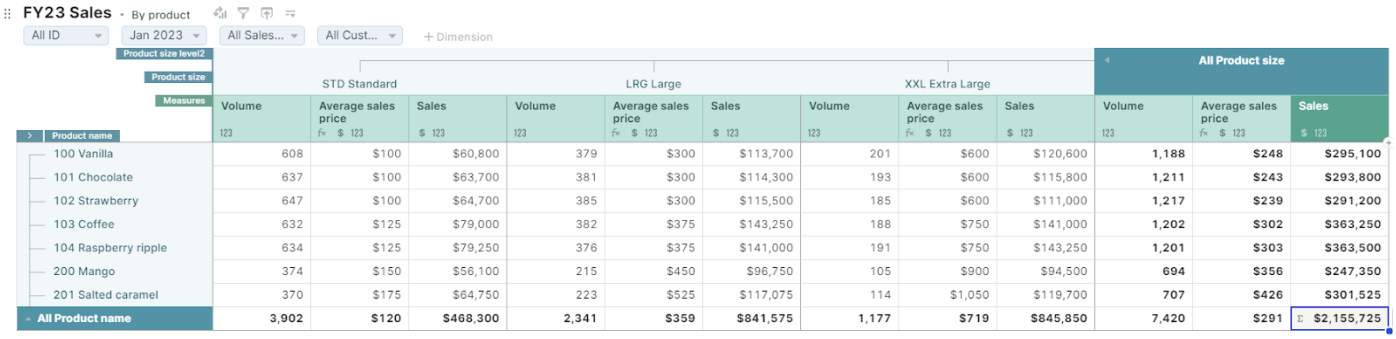
Which sales rep has the highest average sales price for XXL Extra Large total sales in January 2023?

Next, we will use table views for an alternative analysis layout.

Step 6: Add a new By product table view

A table can have unlimited table views.
The table view can be for data entry or detailed, summary or chart analysis

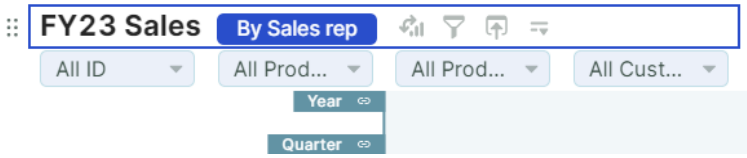
We will add a table view to analyze January 2023 sales by our Product Name and size dimensions.

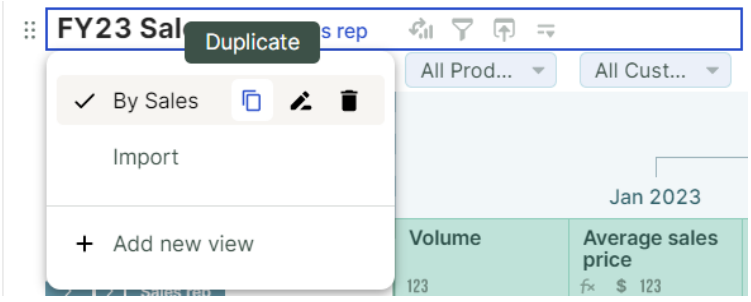


Step 6 - Build the January 2023 sales by product name, by product size for all sales reps and customers

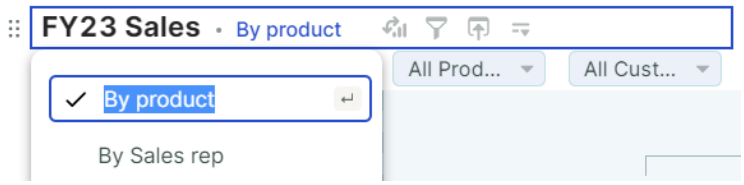
(1) Duplicate the By Sales rep view to start By product view

Click By Sales rep to open the table view menu and duplicate By Sales rep.



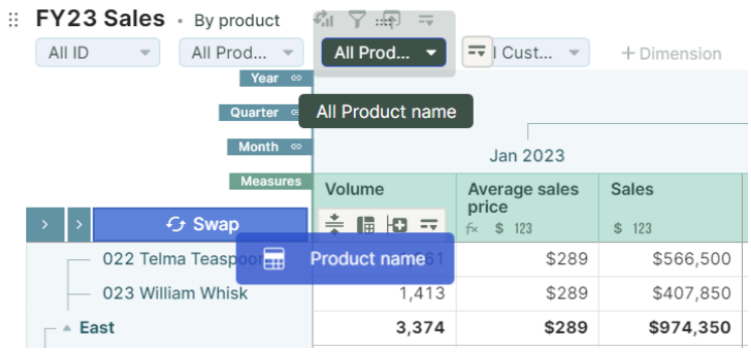


This creates a new View1 table view.
rename to By product.

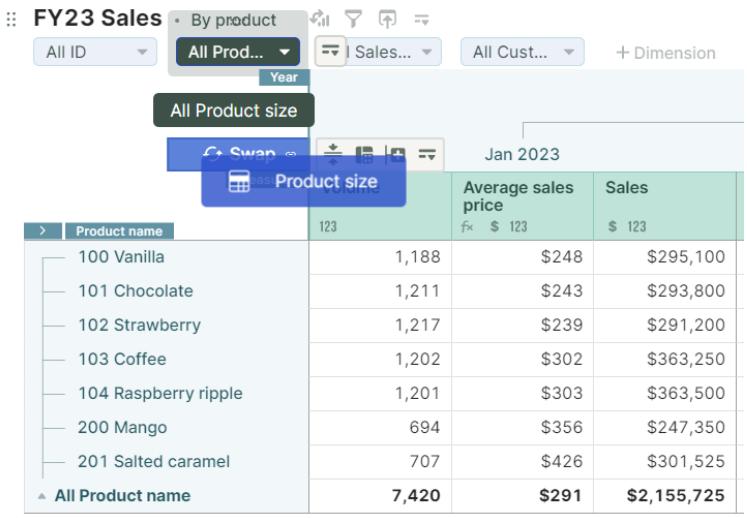


(2) Build the By product view

To analyze January 2023 sales by product in detail, left-click and hold the Product name dimension, move into rows by swapping positions with the Sales rep dimension.



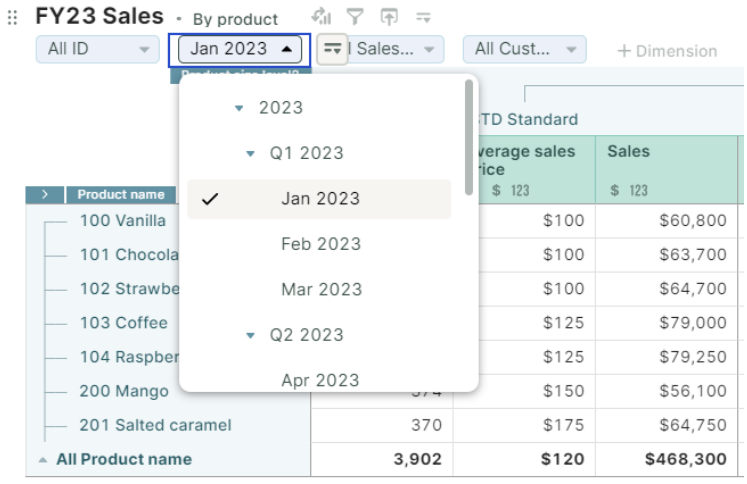
Then move Product size into columns by swapping positions with the time dimension (drop on any time level).



By default, the year total will display. Left-click the time page selector to focus on January 2023.

Work with the table view to answer what are the total sales of product 100 Vanilla size XXL Extra Large for January 2023?

Next we will build our sales team hierarchy, import February 2022 sales and add a new table view in a chart format.



You have completed Part 2, where you:

- Moved dimensions to rows, columns or pages.
- Added summary levels including building a hierarchy to your dimensions.
- Added and summarized, styled and formatted a calculation measure.
- The basics of table views.

Part 3 Build a new table using existing dimensions and build a measure calculation connecting tables

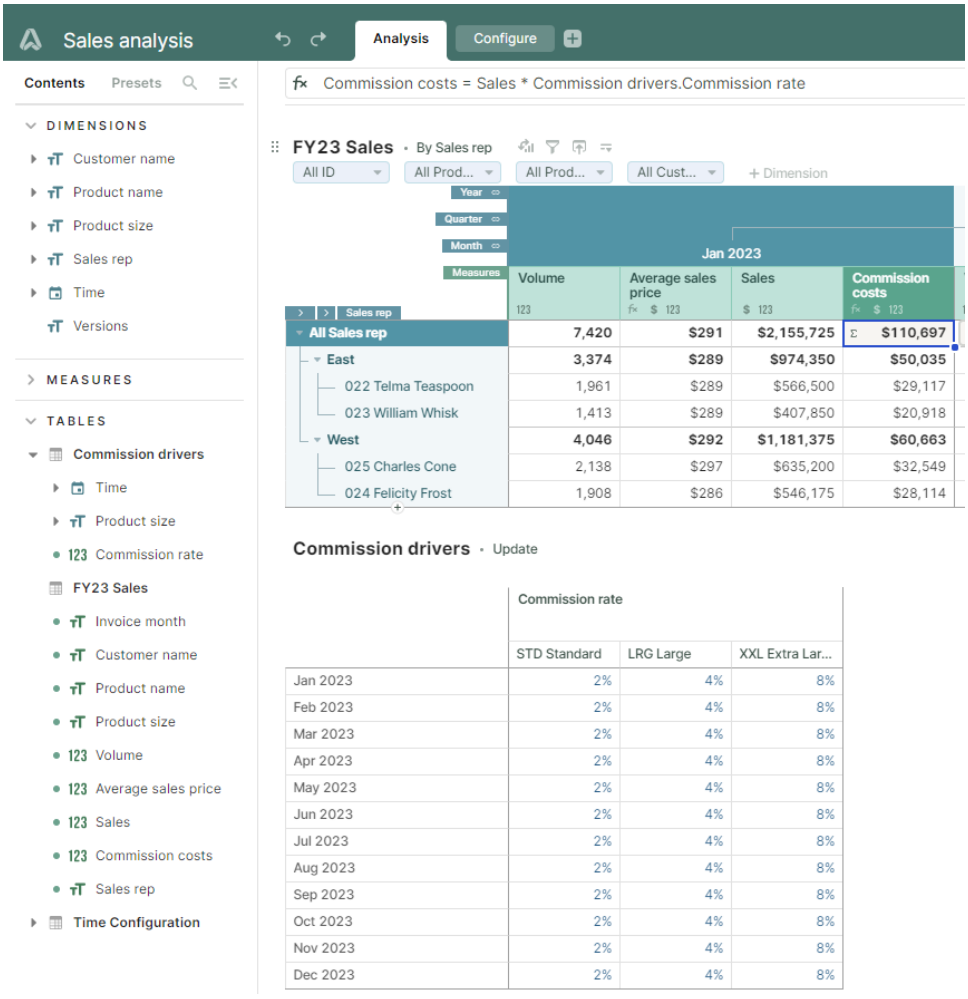
In this Part 3 your will learn:

- Building a new table from existing dimensions using the contents panel.
- Adding a calculation measure on one table that refers to another table.

Step 7: Build a commission cost driver table

Use existing dimensions to build new tables.
Any changes to the dimension items and hierarchy will update in every table and for every measure

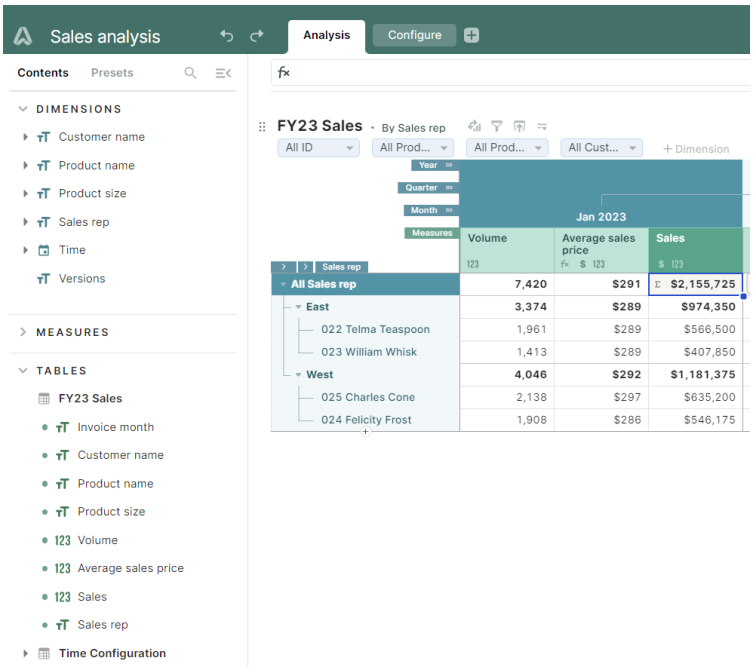
To complete the analysis, we will add the Sales rep commission costs. We need a table to store the cost driver (which will be a % of sales based on Product size).



Step 7 - In the FY23 Sales table, calculate commission costs using a cost driver table

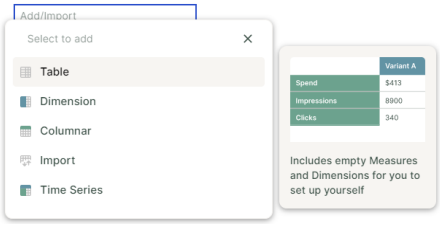
(1) Add a new table in the Analysis dashboard using existing contents

To use an existing dimension, measure or table, open the Contents panel.



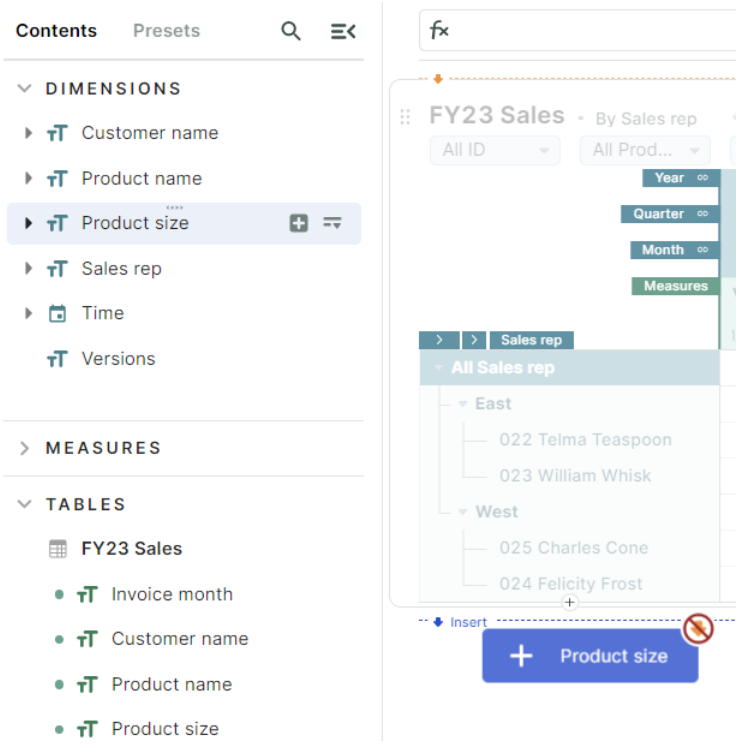
The dimensions, measures and tables built so far in our app are available for reuse, exploring and updating.

An alternate method is to left-click in the grid, click Add/Import *and select Table, then drag in the dimensions.*



To start our new table, left-click and hold the Product size dimension and drag to insert into the grid below the FY23 Sales table.

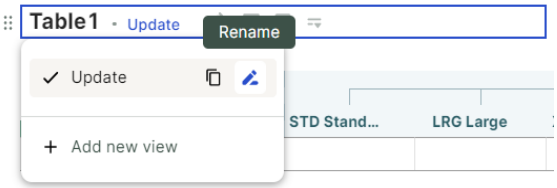
The drop zones appear to highlight valid areas to drop the dimension in the grid.



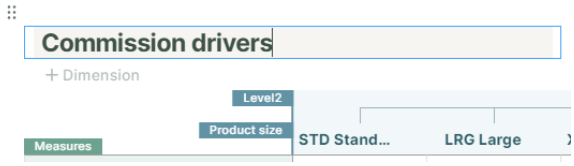
The new Table1 is added with View1.

The new table appears in the contents panel.

Rename View1 to Update (this will be a data entry-focused table).

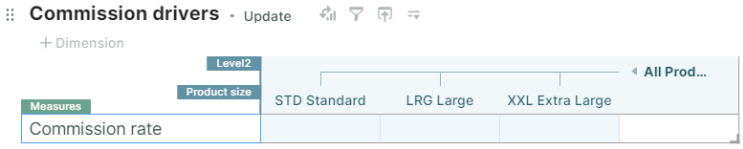


Rename Table1 to Commission drivers.



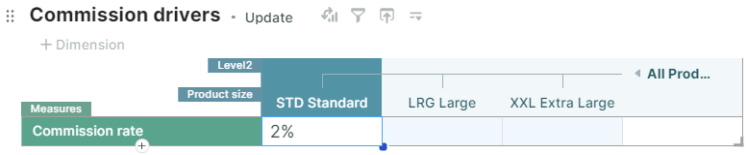
(2) Complete the Commission Drivers table

In the Measures dimension, add Commission rate.



Enter the commission rates by Product size:

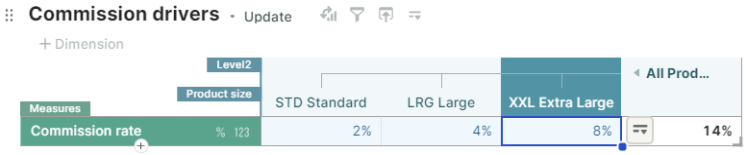
- 2% for STD Standard
- 4% for LRG Large.
- 8% for XXL Extra Large



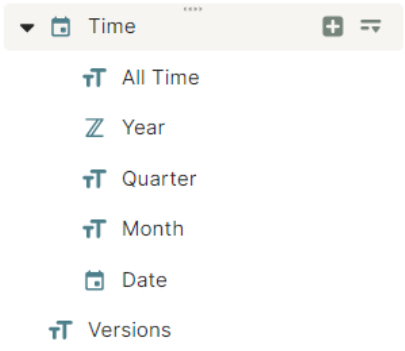
The Commission rate measure will auto-format to % based on the data entry.

(4) Use the Time dimension to store the commission rates by month

We may adjust commission rates in future months (or explore different versions).

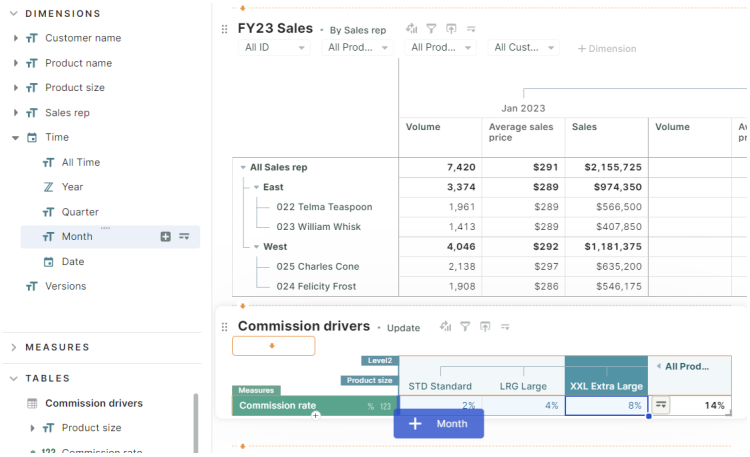


To add the month dimension, expand the Time dimension in contents.



Each level of a dimension is usable. For example, the Sales teams level (in the Sales rep dimension) can be used.

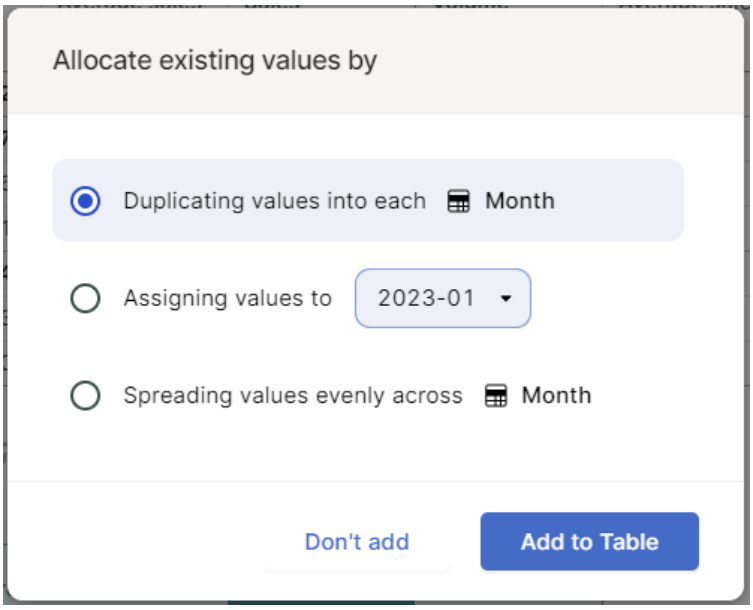
Left-click and hold the Month level of the dimension and drag to insert into the grid to the right of the Commission rate measure.



When you drop, you'll be able to allocate the entered Commission rates. The options are:

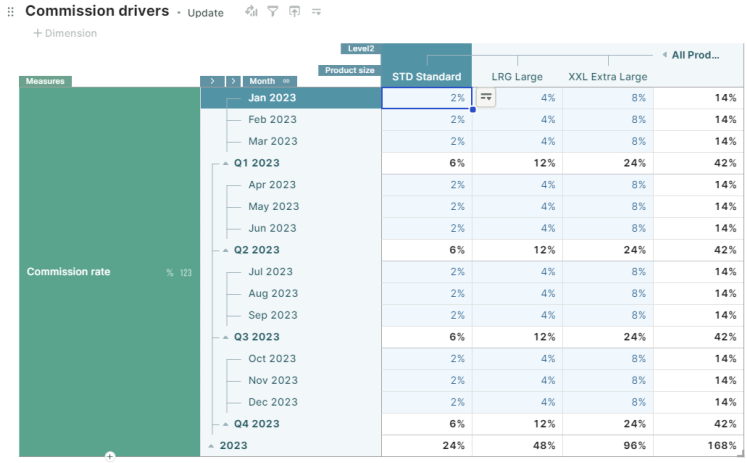
- Duplicating (the % by product size will appear in all months).
- Assigning (select the specific month for the %).
- Spreading (the % will / 12 across all months).

We will allocate by duplicating, click Add to table when ready.

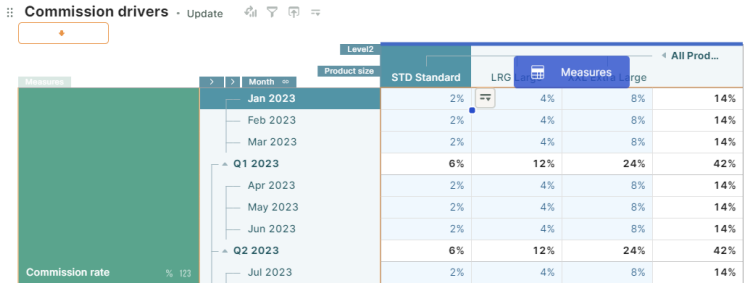


(5) Tidy up the display of the Commission drivers table

The table is now complete. To tidy up , we'll suppress the dimension levels (All Product size, Quarter and Year).

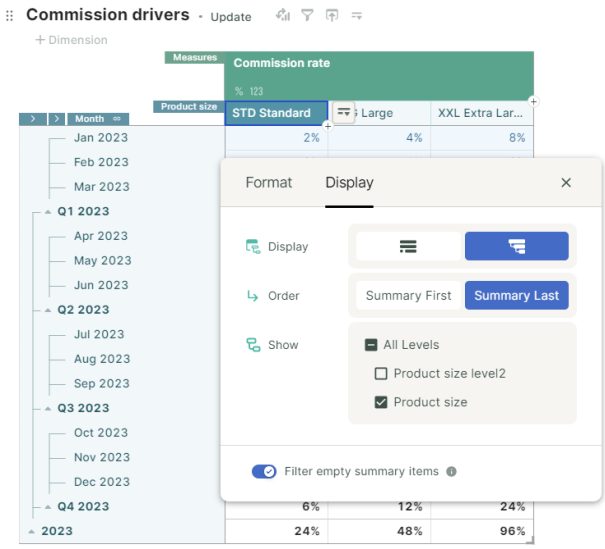


First, left-click and hold the Measures header and move into columns above the Product size dimension.

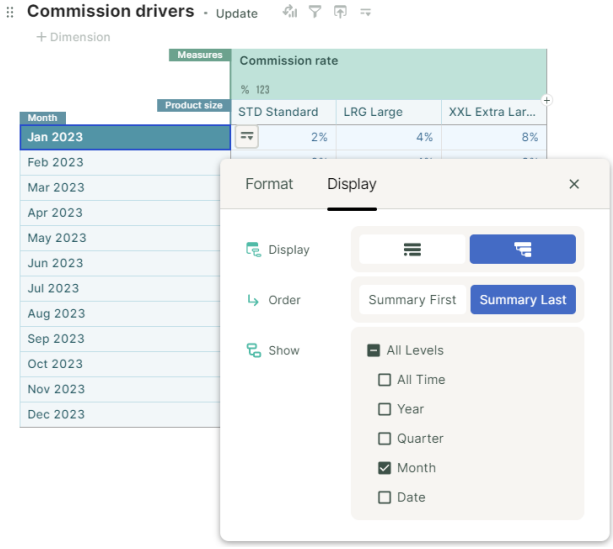


To suppress the display of dimension levels, right-click the Product size dimension and display to:

- uncheck Product size level2 (the 2nd level in the Product size hierarchy, the All Product size total).
- show Product size (the 1st level) only.



Repeat with the time dimension. Right-click and display to uncheck Quarter and Year and show Month only.

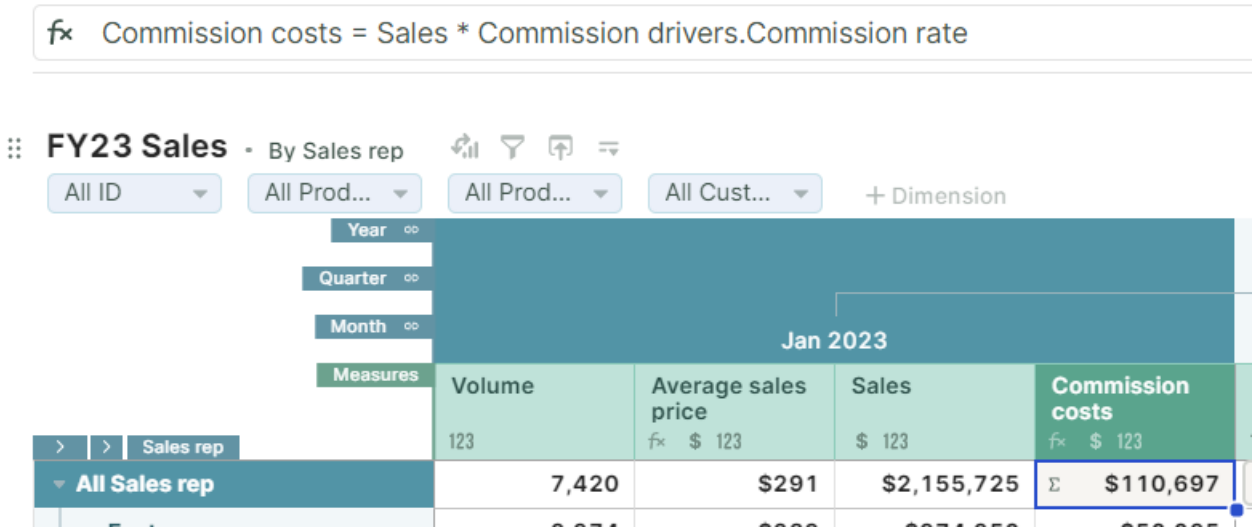


Next we will use the commission rate to add the commission costs measure calculation into the FY23 Sales table.

Step 8: Build a commission cost calculation measure

Calculation measures can connect data between tables.
Advanced calculation measures including IF THEN AND logic and LOOKUP

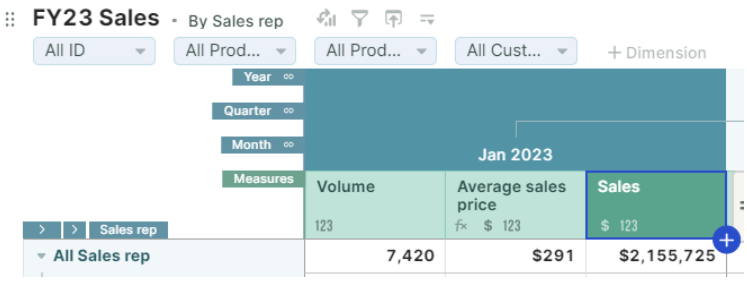
To calculate the commission costs we'll add the calculator measure into FY23 Sales.



Step 8 - In the FY23 Sales table, calculate commission costs

(1) Add commission costs measure in the FY23 Sales table

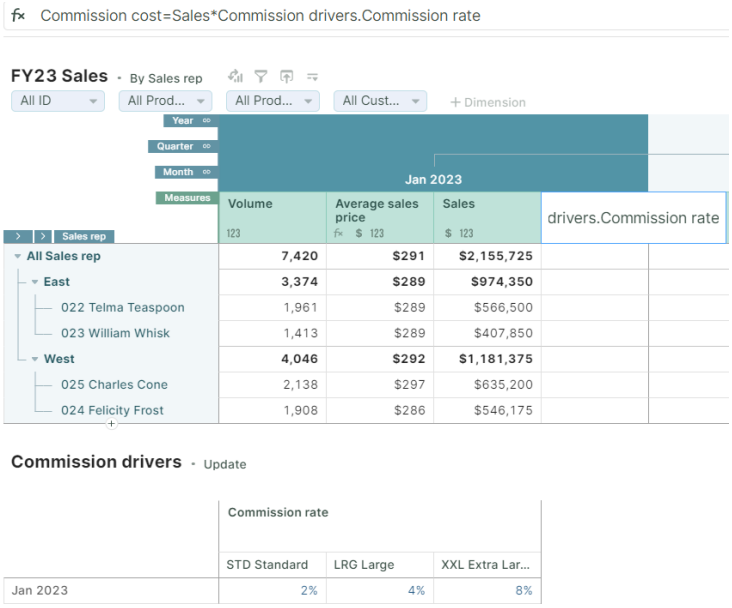
Left-click the Sales measure, hover over to prompt, then left-click ⊕ add a new measure.



Left-click Measure1 and edit (start typing) to rename Commission costs while building the calculation ***Commission costs=Sales*Commission rate***.

To build Commission costs you can also left-click the Sales and Commission rate (in the Commission drivers table) measures.

The fx bar populates with the formula and the Contents panel updates (the Contents panel is dynamically updating).



The FY23 Sales table now displays Commission costs by Sales rep and time.

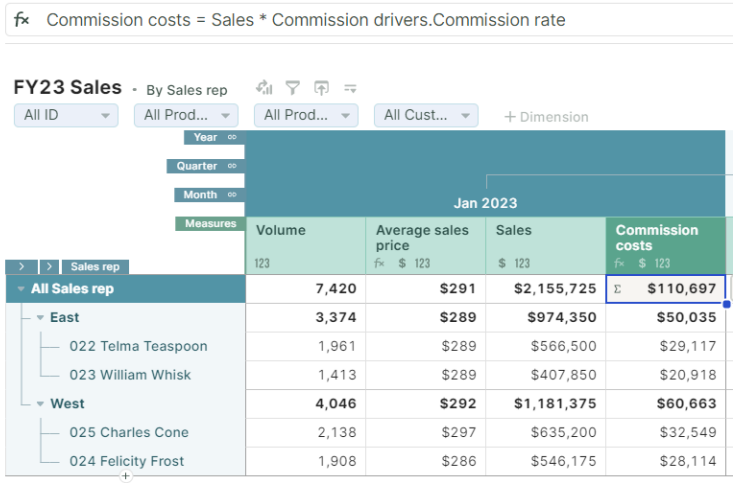
The Commission costs are also completed by Product name, Product size and Customer name dimensions.

The FY23 Sales table is smart! It will match time and product size with the Commission drivers table and complete the calculation across customer, product and sales rep.

*To learn more about measures go **here**.*

Work with the table view to answer what are the commission costs of total sales to our Artic customer in January 2023 (note Telma is the only sales rep)? Answer is after Step 10.

Next we will import February 2022 sales and add a new dashboard, including a new table view in a chart format.



Part 4 Import next month's sales data and add a new dashboard using existing tables

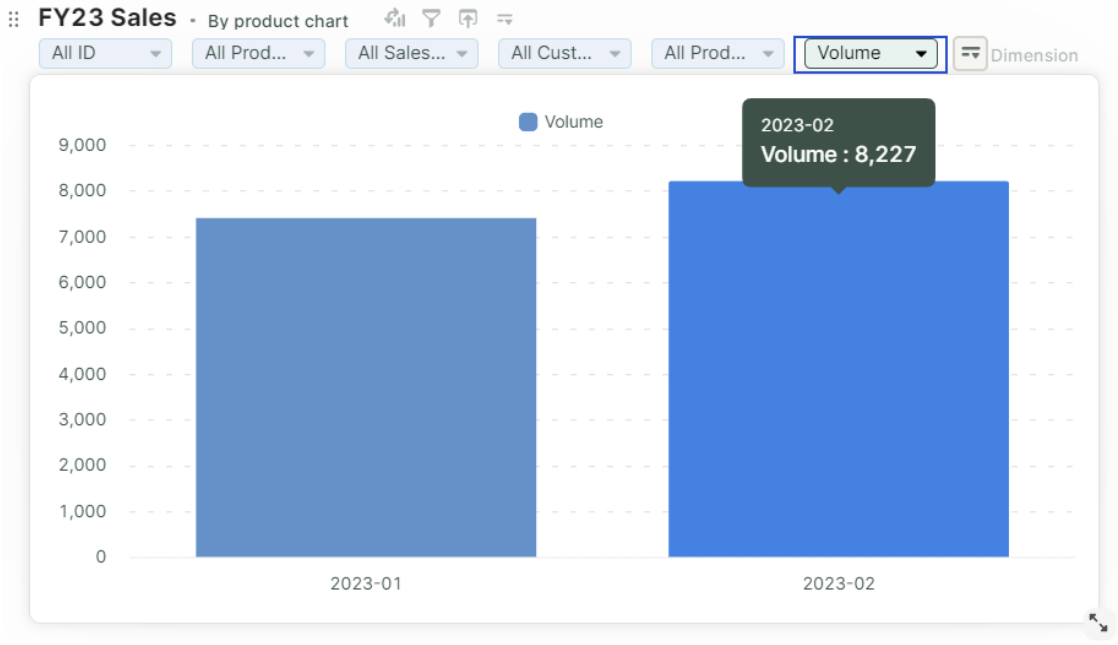
In this Part 4 your will learn:

- Importing into an existing table.
- Using table display to add a chart table view.
- Adding a new dashboard.
- Reusing tables from the Contents panel.

Step 9: Import next month sales and build a chart

Import February 2023 sales easily using the same mapping from January 2023. Add a chart for our measures by all dimensions for visualization

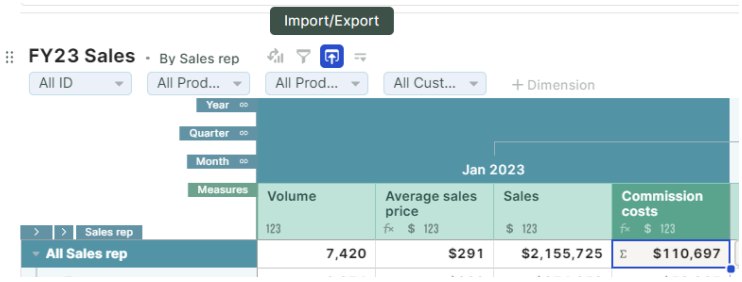
To import February 2023, we'll leverage the existing table-to-CSV mapping from Step 2. We'll display the measures (Volume, Average sales price, Sales and Commission costs) in a chart.



Step 9 - Chart January and February 2023 measures

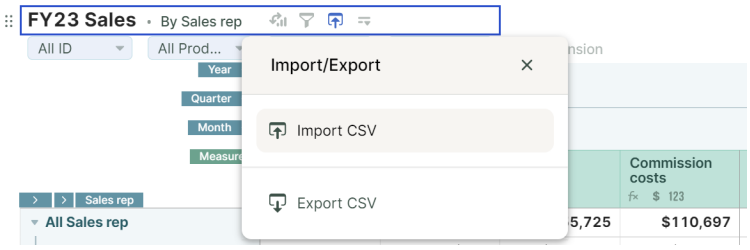
(1) Import February 2023 sales into FY23 Sales table

Left-click import.



Left-click Import CSV and open the **February 2023 sales from CRM** CSV (download from ***here*** if needed).

The import popup appears, where you can update mappings as needed.



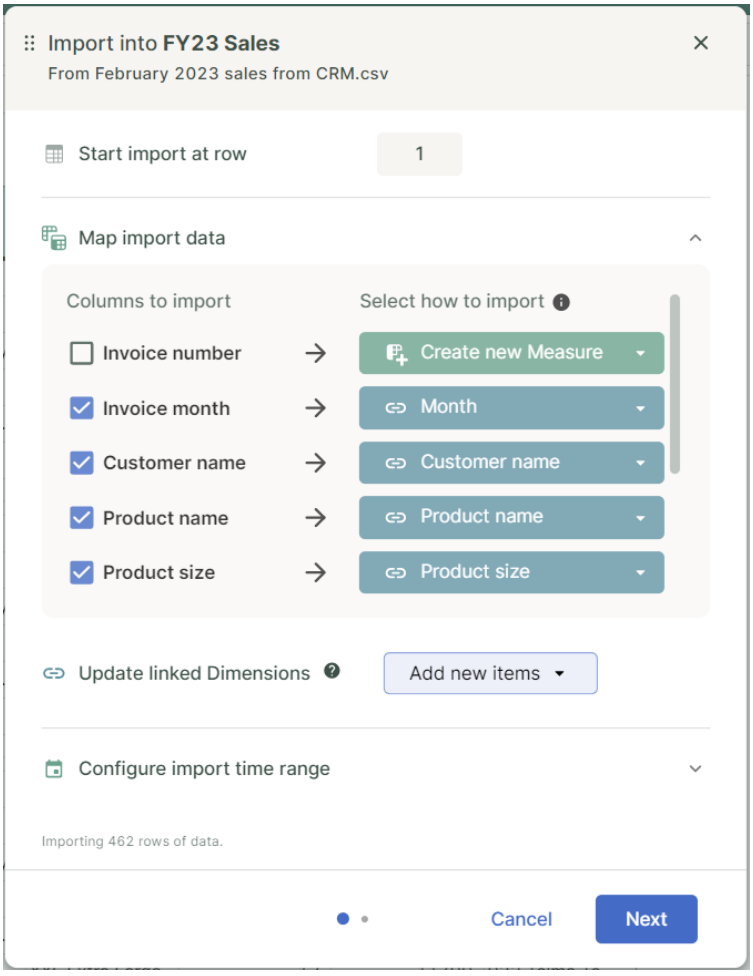
Left-click Map import data to confirm the new import mappings.

The only edit is to deselect Invoice number (not needed) by unchecking from as we are importing all invoices by month.

The CSV file preview allows a check of February data. The FY23 Sales table is behind the scenes (if you were to exit import it will reappear).

The CSV file is identical in layout and structure to the January 2023 file. The FY23 Sales table has already automatically mapped the measures and dimensions for you.

Click Next when ready.



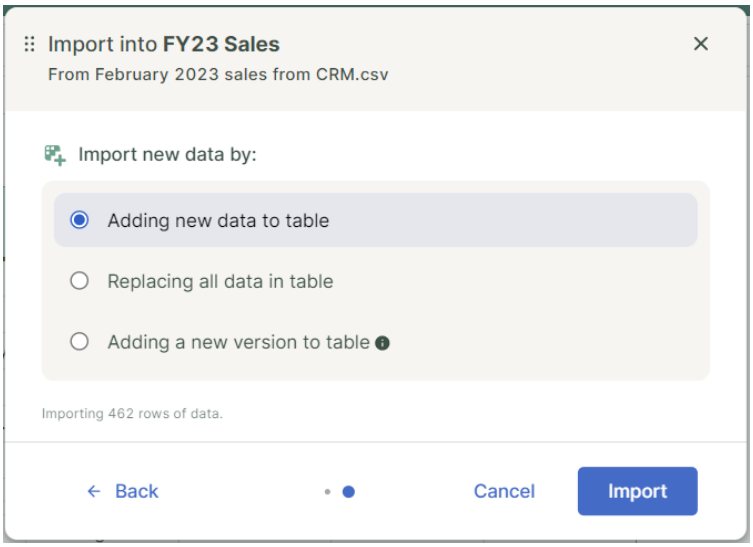
In the second dialogue box you will import the new data by:

- Adding new data. This will add (append) February data to the existing January data.

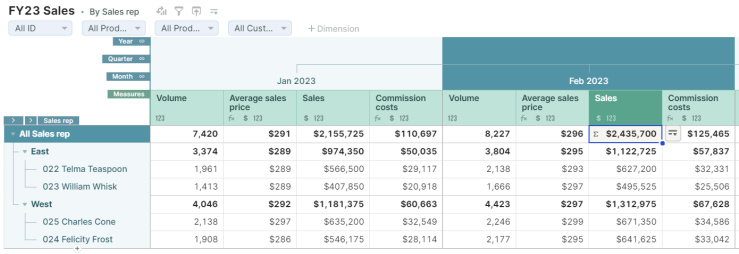
The other options are:

- Replacing (will replace the table and all data, any dimensions and measures will remain available in the Contents panel).
- Adding a new version (will build a Versions dimension for the imported data).

Click Import when ready.



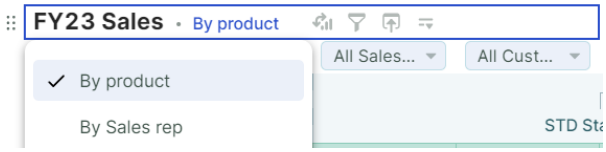
After importing, all table views for FY23 Sales are updated.



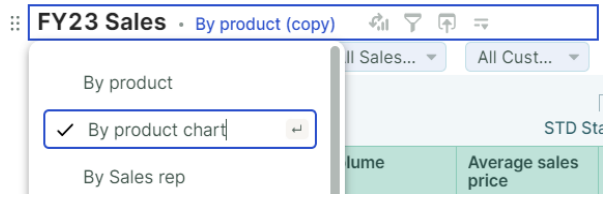
Using this table view, what is the value of total sales by William Whisk for Q1 2023 to date (January + February)?

(3) Prepare a chart of sales by product name by month

Select the By product view.



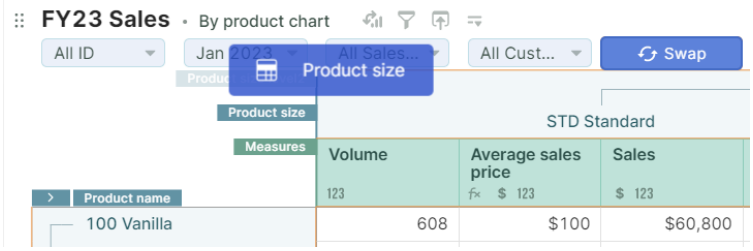
This view has the Product name dimension in rows, the Product size and Measures dimension in columns and Sales rep, Customer name and Time dimensions in pages.



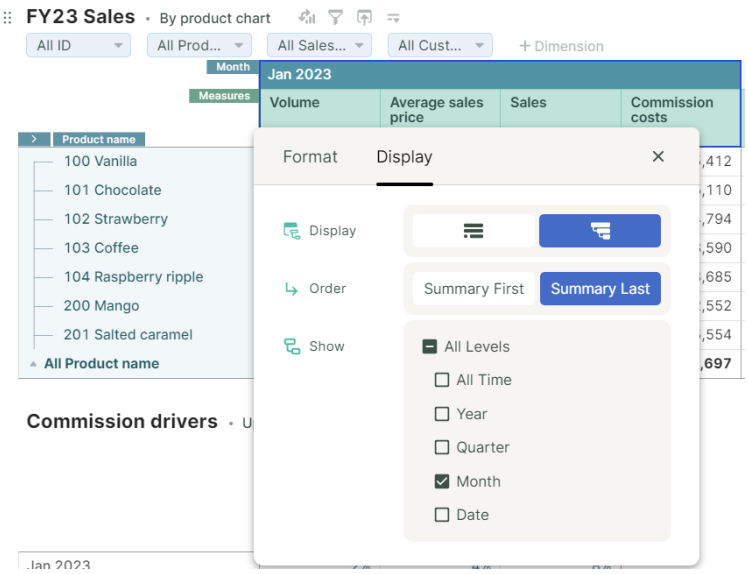
duplicate and rename to By product chart.

To prepare the table view for out by product chart:

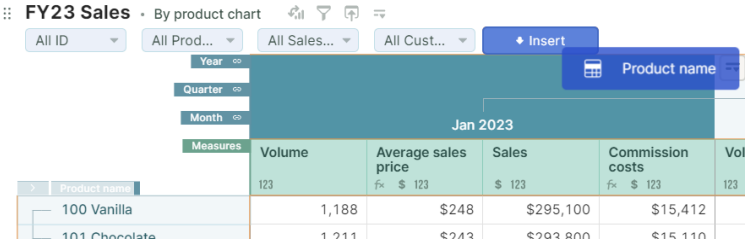
- Left-click and hold the Product size dimension and move into pages by swapping positions with Time (drop on the time header).



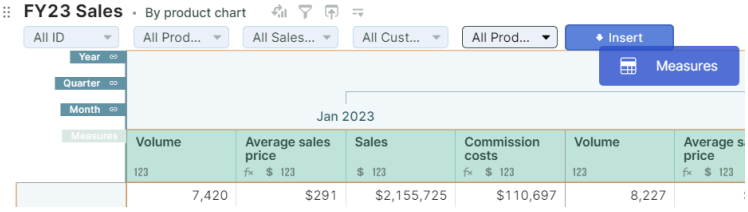
- Right-click the Time dimension Product size dimension and display to uncheck Quarter and Year to show Month only.



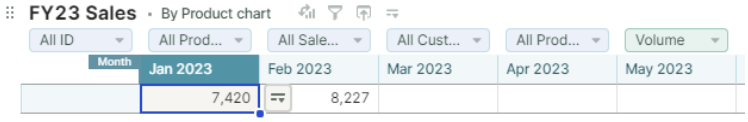
- Left-click and hold the Product name dimension and move into pages inserting next to Customer name.



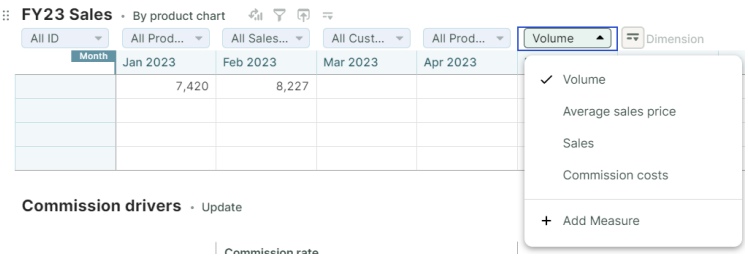
- Left-click and hold the Measures dimension and move into pages inserting next to Customer name.



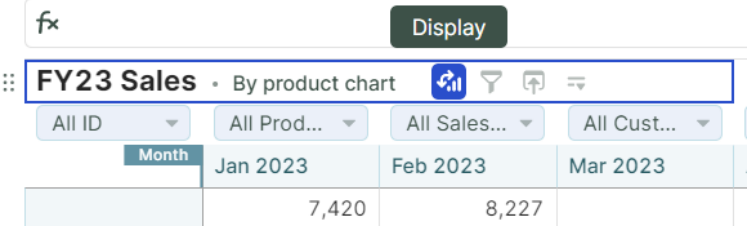
Our dimensions (except time) are pages.



When the chart is displayed, every combination of Product size, Sales rep, Customer name and Product name for Volume, Average sales price, Sales and Commission costs can now be explored over time using the page dropdowns.



Left-click Display to open the display popup.



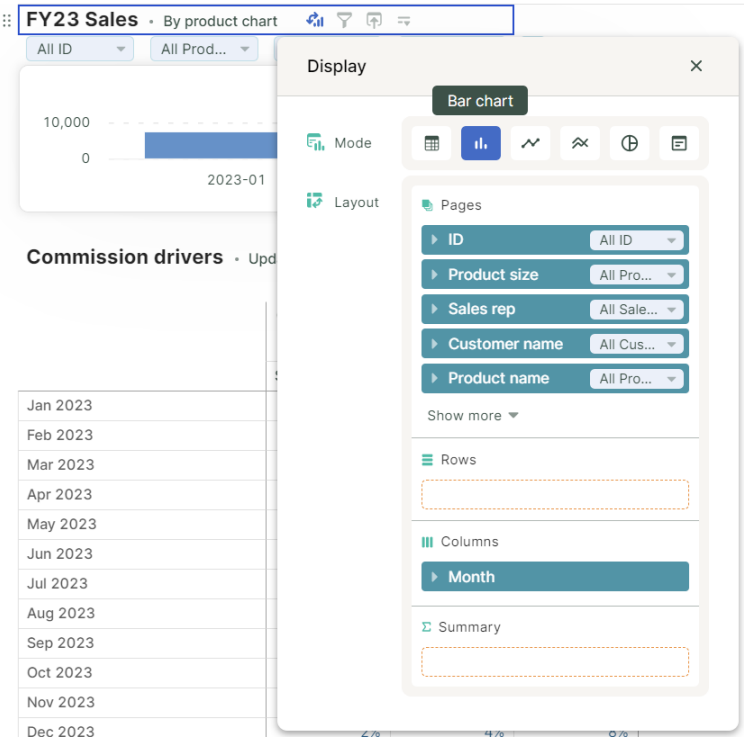
Left-click to select the Mode for this table view to be a bar chart (from table view).

You can explore other display modes for alternate presentations with additional table views.

The . Layout for rows, columns and pages can be used to move all dimensions around.

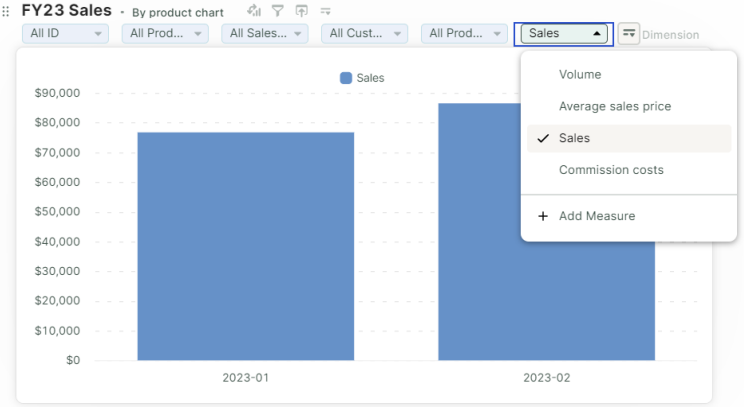
The Summary area of the layout is used to summarize dimensions in the table view.

The impact is that the dimension(s) in this area "hide" from the table view (shown at their All totals level). This is useful for focusing table views to a smaller number of dimensions.



You may need to resize the new chart.

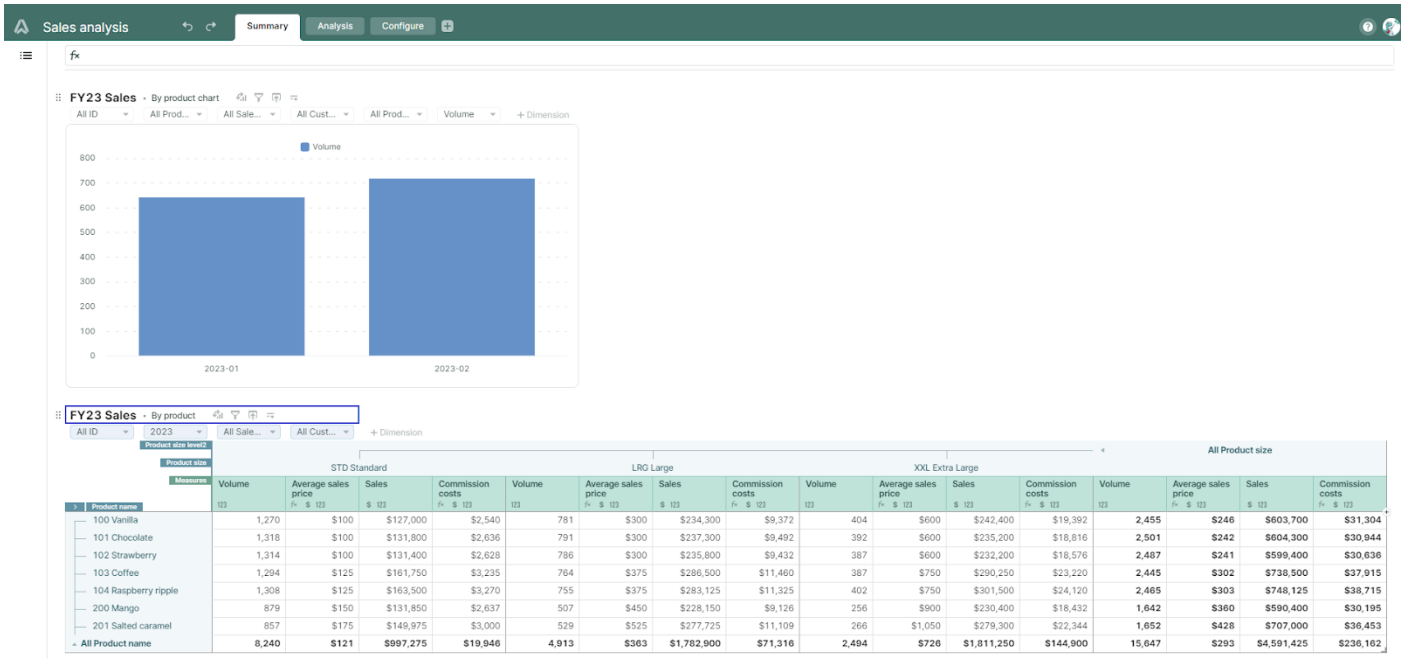
Left-click on the Measures page header and select Sales to complete the table view.



Step 10: Add a new dashboard and reuse a table

Tables are organized on dashboards. You can reuse tables across dashboards. Dashboards can be organized into purpose (data entry, reporting)

The Analysis dashboard holds our FY23 Sales and Commission drivers tables. We want to share a dashboard with multiple table views of FY23 Sales.

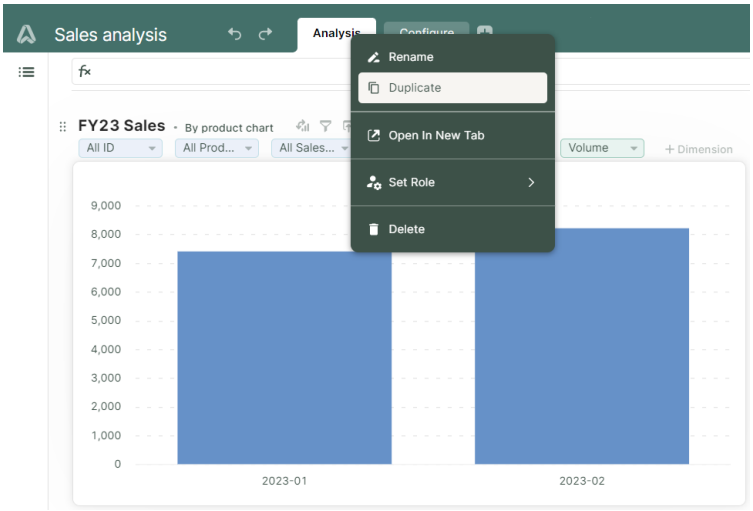


Step 10 objective - add a dashboard and reuse table views

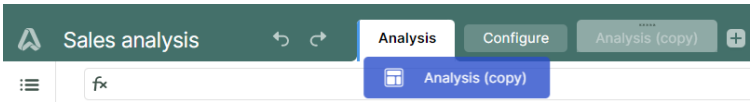
(1) Add (by duplicating) a new dashboard

Right-click and duplicate the Analysis dashboard.

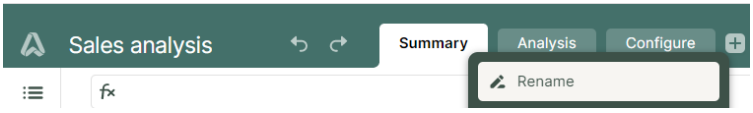
The duplicate dashboard will contain both tables.



Left-click and hold on our new dashboard name and move to the left of Analysis (drop to the left of the header, the blue indicator will help guide).



Right-click and rename the dashboard to Summary.

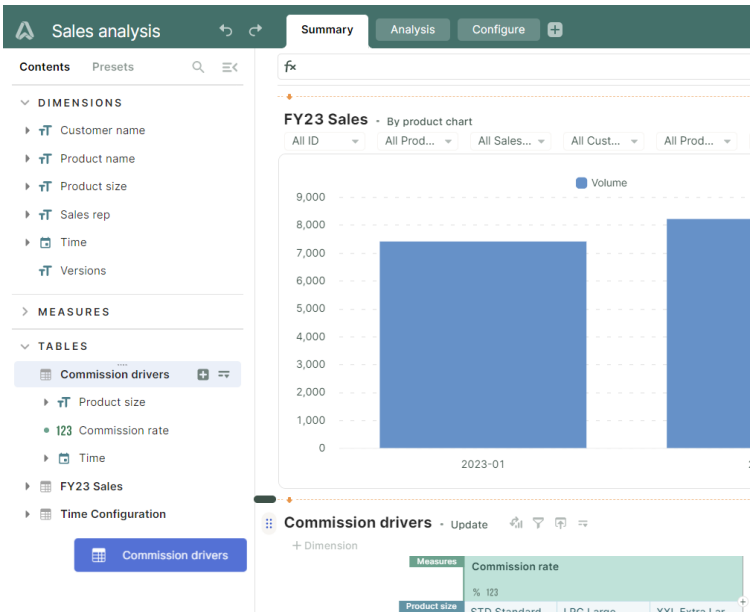


(2) Work with the Contents panel to remove a views

open the Contents panel.

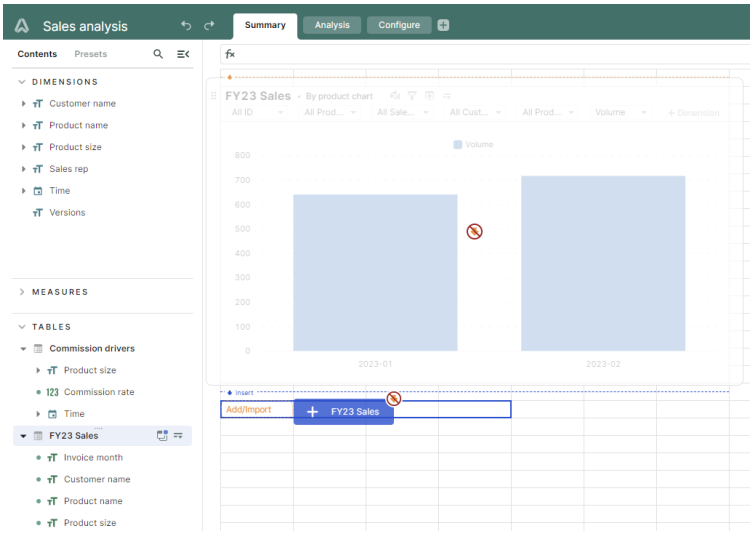
To remove the Commission drivers table you can left-click and hold and drag the table away from the grid and drop on the Contents panel.

Remove a table is also available using right-click on the table name to open the context menu and remove.



(3) Use the Contents panel to reuse a table

To reuse a table, left-click and hold FY23 Sales table name from the Contents panel and drag to insert into the grid below the By product chart.

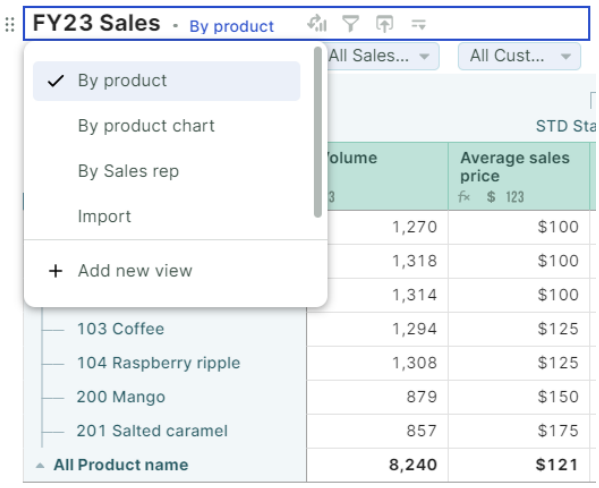


When inserted, you can select the preferred table view (or add a new view).

We will use the By product table view.

We can add additional table views, and use Display to access Mode for table, chart of card types).

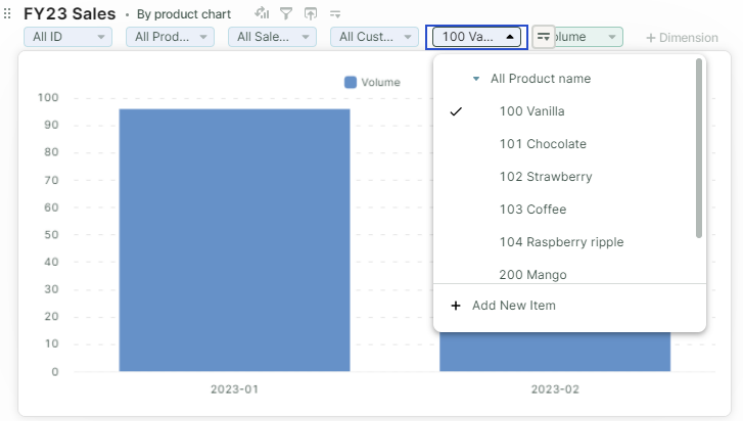
To learn more about display modes go here.

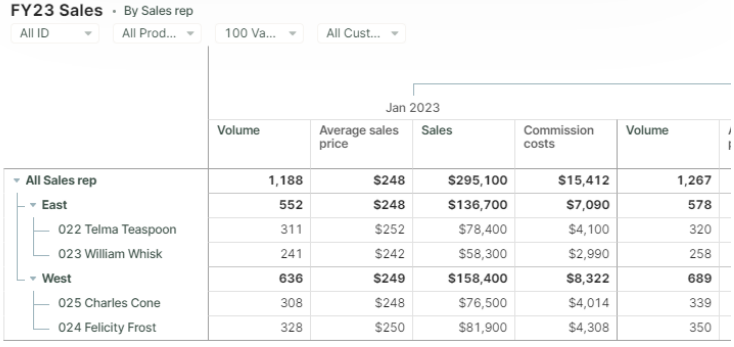


All tables are automatically synchronized. If you open a page dimension and select a different item for your analysis, the tables will update together.

In this example, we are focusing on the sales and costs data for product 100 Vanilla. The table has synchronized with the chart selection.

This is the end of the exercise! Please complete our survey and we'd love your feedback!





You have completed Part 4, where you:

- Imported next month's data into an existing table.
- Added a new chart table view.
- Used the Contents panel to remove and reuse tables in a new dashboard.