

### 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 <u>1-1 training/onboarding</u> meeting or email team@arithmix.com
Want a copy of the app?	Open a completed app from <u>here</u> .

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### **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

?)	<ul><li>In this Part 1 your will learn:</li><li>Adding a new team and app.</li><li>Importing into a new table.</li></ul>
	<ul><li>The basics of dimensions and measures</li><li>What is in the contents panel</li></ul>

### 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.

arithmix 🗛	Q. Search apps		🛟 Upgrade 💁 Invite to Team 👩 🕫
MY TEAMS	My apps		New App     Description:      Description:     Descriptin:     Description:     Description:     Description:     Descri
😩 My apps	Apps Members Billing		
Exercises     Add team	All apps	Last modified	
	Sales analysis	18 hours ago	Share Copy Size Delete

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

### (1) Add team for exercises

In Home, click <sup>+</sup> 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

ΜY	TEAMS					
*	My apps					
**	Exercises -					
	Add 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.

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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).

4	Sales analysis	€ CP	Dashboard 1	Configure 🕂
∷≣	f×			

۵	Sales analysis	• •	Analysis Configure 🕂
:=	f×		🖍 Rename
			Duplicate

Sales analysis	★	Analysis	Configure	•
f×				
CONFIGURE TIME	RANGE			
START DATE				
2023-01-01				
END DATE				
2023-12-31				
FY START MONTH	H			
2023-01-01				
YEARS				
$\checkmark$				
QUARTERS				
$\checkmark$				
MONTHS				
$\checkmark$				
MONTHINDEX				
WEEKS				

### 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.

🔉 Sales analysis		Analys	sis Confi		•					
Contents Presets	् ≡<	f×								
V DIMENSIONS							7			
T Customer name		II FY23 Sal	es · View1	¢¦II	ү ү ⇒					
T Product name		+ Dimensio Measu	n res		0	Desident a serie	Desident size	Maluma	Calas	0-1
			Invoice m	onth	name	Product name	Product size	volume	Sales	Sales rep
TI Product size		ID oo	TT		T	T	Τ	123	123	TT
<b>⊤T</b> Sales rep		1	2023-01	~	D100 Arctic 👻	100 Vanilla 👻	STD Stan 👻	47	4,700	022 Telm
🕨 🛅 Time		2	2023-01	~	D100 Arctic 👻	101 Choc 👻	STD Stan 👻	47	4,700	022 Telm
T Marriana		3	2023-01	~	D100 Arctic 👻	102 Straw 👻	STD Stan 👻	47	4,700	022 Telm
TI Versions		4	2023-01	~	D100 Arctic 👻	103 Coffee 👻	STD Stan 👻	58	7,250	022 Telm
MEASURES		5	2023-01	~	D100 Arctic 👻	104 Rasp 👻	STD Stan 👻	47	5,875	022 Telm
		6	2023-01	~	D100 Arctic 👻	200 Mango 👻	STD Stan 👻	32	4,800	022 Telm
TABLES		7	2023-01	-	D100 Arctic 👻	201 Salte 👻	STD Stan 👻	32	5,600	022 Telm
FY23 Sales	⊑ =	8	2023-01	~	D100 Arctic 👻	100 Vanilla 👻	LRG Large 🛛 👻	32	9,600	022 Telm
• T Invoice month		9	2023-01	~	D100 Arctic 👻	101 Choc 👻	LRG Large 🛛 👻	28	8,400	022 Telm
-		10	2023-01	~	D100 Arctic 👻	102 Straw 👻	LRG Large 🔍	36	10,800	022 Telm
• TI Customer name	e	11	2023-01	-	D100 Arctic 👻	103 Coffee 👻	LRG Large 📼	29	10,875	022 Telm
<ul> <li>T Product name</li> </ul>		12	2023-01	~	D100 Arctic 👻	104 Rasp 👻	LRG Large 🚽	31	11,625	022 Telm
• <b>T</b> Product size		13	2023-01	~	D100 Arctic 👻	200 Mango 👻	LRG Large 👻	16	7,200	022 Telm
a 122 Volumo		14	2023-01	~	D100 Arctic 👻	201 Salte 👻	LRG Large 👻	18	9,450	022 Telm
- 123 volume		15	2023-01	Ŧ	D100 Arctic 👻	100 Vanilla 👻	XXL Extra 👻	16	9,600	022 Telm
<ul> <li>123 Sales</li> </ul>		16	2023-01	~	D100 Arctic 👻	101 Choc 👻	XXL Extra 👻	17	10,200	022 Telm
• 🕂 Sales rep		17	2023-01	~	D100 Arctic 👻	102 Straw 👻	XXL Extra 👻	18	10,800	022 Telm
🔲 🔲 Time Configuratio	n	18	2023-01	-	D100 Arctic 👻	103 Coffee 👻	XXL Extra 👻	15	11,250	022 Telm
		10	2022-01		D100 Aretia	104 Deep	VVI Evitra	10	12,000	022 Telm

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):

	А	В	С	D	E	F	G	Н
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 <u>here</u>.
- Confirm Volume and Sales are measures (the values of data to be analyzed). To learn more about measures go <u>here</u>.

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 <u>here</u> if needed) and open it.

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

2	Sales analysis	★	Analysi	is C	onfigure	•
=	f×					
	Add/Import					
	Select to add		×			
	Table					
	Dimension					
	Columnar		-			
	🛱 Import		-	Date	Sales	Ice cream
	Time Series			Jan 3, 22	\$40.00	Chocolate
				Jan 3, 22	\$35.90	Blueberry
				Import y out withi use	our data in a table	and lay it e ready to

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

暗 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.

۵	Sa	ales analysis	<del>ره</del> :	C <sup>→</sup> Analys	sis Configur	e 🕀					
:=		f×				Import into January 20 From January 2023 sales fr		×			
		January 20 + Dimension	23 sales fro	<b>m</b> - View1	4ी ⊽ 🕀 ≕	Start import at row					
		Invoice number	Invoice month	Customer na	Product name	Product	🛱 Map import data				^
		INV001	2023-01	D100 Arctic	100 Vanilla	STD Star					
		INV001	2023-01	D100 Arctic	101 Chocolate	STD Stan	Columns to import		Select how to import 🚯		1
		INV001	2023-01	D100 Arctic	102 Strawberry	STD Stan	-				
		INV001	2023-01	D100 Arctic	103 Coffee	STD Stan	Invoice number	7	P4. Create new Measur	re -	1
		INV001	2023-01	D100 Arctic	104 Raspberr	STD Stan	Invoice month	$\rightarrow$	₱µ Create new Measure		
		INV001	2023-01	D100 Arctic	200 Mango	STD Stan					
		INV001	2023-01	D100 Arctic	201 Salted car	STD Stan	Customer name	>	P4. Create new Measur	re 🔻	1.
		INV001	2023-01	D100 Arctic	100 Vanilla	LRG Larg	Product name	$\rightarrow$	📭 Create new Measu		
		INV001	2023-01	D100 Arctic	101 Chocolate	LRG Larg	-				
		INV001	2023-01	D100 Arctic	102 Strawberry	LRG Larg	Product size	>	P4. Create new Measur	re 🔻	J
		INV001	2023-01	D100 Arctic	103 Coffee	LRG Larg					
		INV001	2023-01	D100 Arctic	104 Raspberr	LRG Larg					
		INV001	2023-01	D100 Arctic	200 Mango	LRG Larg	Importing 462 rows of data.				
		INV001	2023-01	D100 Arctic	201 Salted car	LRG Larg					
		INV001	2023-01	D100 Arctic	100 Vanilla	XXL Extra			Cancel	Impor	1
		1511/001	2022-01	D100 Arotio	101 Choselate	VVI Extra					

#### (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.

to open the how

column. Scroll down the link to existing area, left-click the

Month dimension. The select

how to import will update to

The import will be used to

create dimensions for Customer

name, Product name, Product size and Sales rep. Left-click

✓ Invoice month → G⇒ Month

Left-click Invoice month

to import options for this

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

each and update to

🚌 Create new Dimension 🔺

#### : Import into January 2023 sales from CRM X From January 2023 sales from CRM.csv Start import at row 1 🔚 Map import data Columns to import Select how to import () $\rightarrow$ Invoice number Invoice month F Create new Measure $\rightarrow$ Customer name $\rightarrow$ 🖳 Create new M... 🖳 Create new Di... $\rightarrow$ Product name Product size $\rightarrow$ Link to existing Year orting 462 rows of data 📰 Quarter 📰 Month 📰 Date

#### 🛱 Map import data





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- The Volume and Sales columns are values and will remain
   F<sub>4</sub> Create new Measure
- Accept the default Add new items update option and click mport 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.

::	Import into January 202 From January 2023 sales fro	23 sales m CRM.c	s from CRM	×
ľ	Start import at row		1	
f	🚡 Map import data			^
	_			
	Product name	$\rightarrow$	🛱 Create new Dimension 👻	
	Product size	$\rightarrow$	🛱 Create new Dimension 👻	
	Volume	$\rightarrow$	🗗 Create new Measure 🛛 🗸	
	Sales	$\rightarrow$	🗗 Create new Measure 🕞	
	Sales rep	$\rightarrow$	🛱 Create new Dimension 👻	
c	Update linked Dimensio	ns 🛛	Add new items 🔻	
ť	Configure import time ra	ange		~
Ir	nporting 462 rows of data.			
			Cancel	

### (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).

#### :: January 2023 sales from ... - View1 🛛 🖓 🕁 🖛

+ D	imension								
	Measures	Invoice mon	th	Customer name	Product name	Product size	Volume	Sales	Sales rep
ID40				тТ	тТ	тТ	123	123	тТ
1		2023-01	-	🔫)0 Arctic 👻	100 Vanilla 📼	STD Stan 👻	47	4,700	022 Telm 👻
2		2023-01	Ŧ	D100 Arctic 👻	101 Choc 👻	STD Stan 👻	47	4,700	022 Telm 💌
3		2023-01	Ψ.	D100 Arctic 👻	102 Straw 👻	STD Stan 👻	47	4,700	022 Telm 👻
4		2023-01	-	D100 Arctic 👻	103 Coffee 👻	STD Stan	58	7 250	022 Telm 🚽

#### :: January 2023 sales from ... - View1 🖓 🖓 🖘

τD	Intension								
	Measures	Invoice mo	nth	Customer name	Product name	Product size	Volume	Sales	Sales rep
ID00		тТ		т	тТ	π	123	123	тт
1		2023-01	~	D100 Arctic 👻	100 Vanilla 📼	STD Star	47	4,700	022 Telm 🔻
2		2023-01	~	D100 Arctic 👻	101 Choc 👻	STD Stand	arr. 🗖	4,700	022 Telm 👻
3		2023-01	~	D100 Arctic 👻	102 Straw 👻			4,700	022 Telm 👻
4		2023-01	~	D100 Arctic 👻	103 Coffee 📼	LRG Large		7,250	022 Telm 👻
5		2023-01	~	D100 Arctic 👻	104 Rasp 👻	XXL Extra I	arge	5,875	022 Telm 👻
6		2023-01	~	D100 Arctic 👻	200 Mango 📼			4,800	022 Telm 👻
7		2023-01	-	D100 Arctic 👻	201 Salte 👻	+ Add new		5,600	022 Telm 👻
8		2023-01	-	D100 Arctic 👻	100 Vanilla 👻	LRG Large 🚽	32	9.600	022 Telm 👻

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

<sup>★</sup> Missed something? You can always ∽ undo!

The ID dimension will auto-total numeric columns.

462	2023-01	Ŧ	R201 Lava	Ŧ	201 Salte	XXL Extra 👻	3	3,150	023 Willia 👻
461	2023-01	Ŧ	R201 Lava	~	200 Mango 👻	XXL Extra 👻	3	2,700	023 Willia 👻
460	2023-01	-	R201 Lava	-	104 Rasp 👻	XXL Extra 👻	6	4,500	023 Willia 👻
459	2023-01	-	R201 Lava	Ψ.	103 Cottee 🔻	XXL Extra 👻	р	4,500	023 Willia 👻

X 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, *k* rename to FY23 Sales.

# FY23 Sales

_	D1	on	CI	0	5	

	Measures	Invoice mon	th	Customer name	Product name	F
ID00		τT		тТ	тТ	1
1		2023-01	~	D100 Arctic 👻	100 Vanilla 👻	S
2		2023-01	Ŧ	D100 Arctic 👻	101 Choc 👻	S
3		2023-01	-	D100 Arctic 👻	102 Straw 👻	S

The table has 2 views:

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

÷	FY23 Sales View1	ア ᡎ ᆕ		
	Import	Customer	Product name	F
	✓ View1	T	тТ	Ť
		D100 Arctic 👻	100 Vanilla 👻	S
	+ Add new view	D100 Arctic 👻	101 Choc 👻	S
		D100 Arctic 👻	102 Straw 👻	S

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### (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 **T** dimensions, <sup>123</sup> 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.

s analysis			€*	Analysis	Config	gure	0							
Presets	Q :	=<	f×											
BIONS														
omer name			∷ FY:	23 Sales	• View1	41	Ÿ (Ā ≕		]					
uct name			+1	Dimension										
					Invoice mo	onth	name	Product name	Product size	volume		Sales	Sales rep	
uct size			ID**		T 2023-01		TT D100 Arctic =	TT 100 Vanilla –	fT STD Stan	123	47	123	rT 022 Telm	
s rep			2		2023-01		D100 Arctic +	101 Choc	STD Stan		47	4,700	022 Telm	÷
			3		2023-01		D100 Arctic +	102 Straw v	STD Stan v		47	4,700	022 Telm	
ions			4		2023-01	~	D100 Arctic 👻	103 Coffee 👻	STD Stan +		58	7,250	022 Telm	÷
			5		2023-01	÷	D100 Arctic 👻	104 Rasp 👻	STD Stan 👻		47	5,875	022 Telm	÷
RES			6		2023-01	÷	D100 Arctic 👻	200 Mango 👻	STD Stan 👻		32	4,800	022 Telm	÷
5			7		2023-01	÷	D100 Arctic 👻	201 Salte 👻	STD Stan 👻		32	5,600	022 Telm	÷
3 Sales	C;				2023-01	÷	D100 Arctic 👻	100 Vanilla 👻	LRG Large 🔍		32	9,600	022 Telm	÷
woice month			9		2023-01	÷	D100 Arctic 👻	101 Choc +	LRG Large 🚽		28	8,400	022 Telm	Ŧ
Worde month			10		2023-01	÷	D100 Arctic 👻	102 Straw 👻	LRG Large 👻		36	10,800	022 Telm	¥
Sustomer name			11		2023-01	÷	D100 Arctic 👻	103 Coffee 👒	LRG Large 👻		29	10,875	022 Telm	Ŧ
roduct name			12		2023-01	÷	D100 Arctic 👻	104 Rasp 👻	LRG Large 🔍 👻		31	11,625	022 Telm	Ŧ
roduct size			13		2023-01	÷	D100 Arctic 👻	200 Mango 👻	LRG Large 🛛 👻		16	7,200	022 Telm	÷
olume			14		2023-01	Ŧ	D100 Arctic 👻	201 Salte 👻	LRG Large 🛛 👻		18	9,450	022 Telm	Ŧ
alas			15		2023-01	×	D100 Arctic 👻	100 Vanilla 👻	XXL Extra 👻		16	9,600	022 Telm	v
dieo			16		2023-01	Ŧ	D100 Arctic 👻	101 Choc 👻	XXL Extra 👻		17	10,200	022 Telm	Ŧ
ales rep			17		2023-01	Ŧ	D100 Arctic 👻	102 Straw 👻	XXL Extra 👻		18	10,800	022 Telm	Ŧ
• Configuration			18		2023-01	~	D100 Arctic 👻	103 Coffee 👻	XXL Extra 👻		15	11,250	022 Telm	Ŧ
			19		2023-01	Ŧ	D100 Arctic 👻	104 Rasp 👻	XXL Extra 👻		16	12,000	022 Telm	Ŧ
			~	TAE	BLE FY2	s 3	Sales		<b>[]</b> =	•				
				•	ਜ । ਜ ( ਜ ।	Inv Cu Pro	oice m stomer oduct n	onth <sup>-</sup> name aame						
				•	π	Pro	duct s	ize						

- 123 Volume
- 123 Sales
- **T** Sales rep



You have completed Part 1, where you:

TABLE

• 123

- 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

<ul> <li>In this Part 2 your will learn:</li> <li>Moving (pivoting and slicing) dimensions to rows, columns or pages.</li> <li>Adding summary levels to subtotal and total your data.</li> <li>Adding a calculation measure.</li> <li>The basics of table views.</li> </ul>
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### 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).

FY23 Sales	<ul> <li>By Sales rep</li> </ul>	🕯 🍸 🕁 📼						
All ID 📼	All Prod 👻	All Prod 👻	All Cust 💌	+ Dimension				
Year 👳								
Quarter 🖙							< Q12	2023
Month 🗢	Jan	2023	Feb	2023	Mar	2023		
Measures	Volume	Sales	Volume	Sales	Volume	Sales	Volume	Sales
Sales rep	123	123	123	123	123	123	123	123
022 Telma Te	1,961	566,500					1,961	566,500
023 William	1,413	407,850					1,413	407,850
025 Charles	2,138	635,200					2,138	635,200
024 Felicity F	1,908	546,175					1,908	Σ 546,175

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 **A** 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.



4 T 🗗 🖘

Customer name

D100 Arctic 👻

τT

### (2) Move dimensions to rows

Left-click and hold the Customer name dimension and + move to  $\equiv$  rows.

Repeat for Product name.

:: FY23 Sales • By Sales rep 41 7 🗗 = . Measures Invoice month тT D100 Arctic 📼 Customer name D100 Arctic 2023-01 D100 Arctic 👻

┙

:: FY23 Sales · By Sales rep St 7 🗗 🖛

:: FY23 Sales • By Sales rep

By Sales rep

Import



Finally, repeat for Sales rep.

Repeat for Product size.

🥗 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.

:: FY23 Sales • By Sales rep Ra 7 🕁 =

Measures Invoice month Product size Product name STD Stan. 47 4,700 ↔ Product size LRG Large 32 9,600 2023-01 XXL Extra 16 9,600 100 Vanilla 2023-01 STD Stan... 49 4,900 239 2023-01 LRG Large 35 10,500 246 2023-01 XXL Extra .. 10.200 AII ID 196 49,500

🗄 FY23 Sales + By Sales rep – 👫 🍸 🕀 🖛

		Measures	Invoice month	Volume	Sales	Sales rep
Customer name Product name	Product size		тТ	123	123	न
		-	2023-01 👻	47	4,700	022 Telm 👻
	STD Standard	₂s∰ Sales r	ep023-01 🚽	49	4,900	022 Telm 👻
		All ID		96	9,600	

#### :: FY23 Sales · By Sales rep 41 7 🗇 🖚

				Measures	s li	nvoice month	Volume	Sales
Customer name	Product name	Product size	Sales rep	ID 00	Ť	r	123	123
				1	2	023-01 👻	47	4,700
		STD Standard	022 Telma Te	232	×	Cut	Ctrl+X	4,900
				All ID	'n	0	04-1-0	9,600
				8		Сору	Ctri+C	9,600
	100 Vanilla	LRG Large	022 Telma Te	239				10,500
				All ID	+	Add	,	20,100
		XXL Extra Lar	022 Telma Te	15	G Filter/So	Filter/Sort	>	9,600
				246		Show/Hide	>	10,200
				All ID				19,800
				2	÷	Move	>	4,700
		STD Standard	022 Telma Te	233	Î	Remove/Delet	te >	5,900
				All ID				10,600
				9	5	Convert	>	8,400
	101 Chocolate	LRG Large	022 Telma Te	240	_			9,300
				All ID	18	Display		17,700
				16				10.200

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In display  $\Box$  uncheck ID to show  $\checkmark$  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 **III** 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



:: FY23 Sales · By Sales rep

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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 <u>here</u>.* 

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

AII ID 👻	+ Dimension					
			Year ∞			
			Quarter 👓			
			Month ∞		Jan 2	2023
			Measures	Volume		Sales
Customer name	Product name	Product size	Sales rep	123		123
			Telma Te		96	9,600
		STD Standard	023 William			
		STD Standard	025 Charles			
			024 Felicity F			
		. Summoru		~	77	20,100
	100 Vanilla	+ Summary	Lever	^		
		🛱 Add new				
		् Search exi	sting dimensions		) 3	19,800
		Versions			Ē	
			022 Tolmo To		106	10.600

🗄 FY23 Sales • By Sales rep 🛛 🖓 🖓 🤜





#### Then left-click and hold Product size

and  $\div$  move  $\blacksquare$  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  $\stackrel{\bullet}{\rightarrow}$  move  $\stackrel{\bullet}{=}$  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  $\blacksquare$  display  $\rightarrow$  order Summary First.

Then  $\stackrel{\clubsuit}{\rightarrow}$  move  $\stackrel{\blacksquare}{\rightarrow}$  pages.

				000 William			
# FY23 Sales	🛚 • By Sales rep 🖓	Ţ (†) =					
All ID 👻	All Prod	- Dimension					
				Year ⇔			
				Quarter 👳			
				Month 👳		Jan 2	2023
				Measures	Volume		Sales
Customer name	> Product name		Sales re	ep	123		123
			== ? T	elma Te		1,220	35
	- All Product name		023 V	/illiam			
			025 C	harles			
			024 F	elicity F			
						196	
	Format Disp	olay			×		
		_					
	n Display	=		壃			
						197	
	L→ Order	Summary Fi	rst	Summary	Last	-	
			_				
	🔁 Show	All Levels	5			204	
		🗹 Produc	t nam	e level2		204	
		Produc	t nam	e		-	
# FY23 Sales	s • By Sales rep ধাঁ।	7 🕀 📼					
II FY23 Sales	S • By Sales rep All Prod ▼	ি ন্ ⊸ • Insert		Product na	me		
III ID	S • By Sales rep 4,1	ি ন্ ⊸ • Insert		Product na quarter © Month ©	me	Jan 2	2023
FY23 Sales	S • By Sales rep 4	ি ি ⊸ • Insert		Product na œuarter ∞ Month ∞ Measures	me Volume	Jan 2	2023 Sales
FY23 Sales	S • By Sales rep	िर्िन्≂ •Insert	Sales r	Product na Guarter ∞ Month ∞ Measures	me Volume 123	Jan 2	2023 Sales
All ID  Customer name	S • By Sales rep All Prod •	ি িিছেব ∳ Insert	Sales ro	Product na Guarter o Month o Measures IP elma Te	me Volume 123	Jan 2 1,220	2023 Sales 123 3!
EFY23 Sales All ID Customer name FY23 Sale All ID	S • By Sales rep All Prod • Product name CS • By Sales rep All Prod •	♥         (P)           •         Insert	Salos r T T T Salos r T T T T T T	Product na Guarter • Menth • Measures IP elma Te Ins	me Volume 123 ert	Jan 2 1,220	2023 Sales 123 34 34 34
Customer name	S • By Sales rep All Prod • Product name CS • By Sales rep All Prod •	Y       (P)         ◆ Insert	Sales r Sales r sal	Product na Guarter Month Measures P elma Te	me Volume 123 ert	Jan 2 1,220	2023 Sales 123 3: tomer na
E FY23 Sales All ID Customer name E FY23 Sale All ID	S • By Sales rep All Prod • Product name CS • By Sales rep All Prod •	♀       (P) =         ♥ Insert	Sales re Sales re T T T T T T T T T S Sures	Product na Guarter or Month or Measures P elma Te Ins Volume	me 123 ert Jan 2	Jan 2 1,220 Cus 2023 Sales	2023 Sales 123 32
FY23 Sales All ID FY23 Sale All ID	S • By Sales rep All Prod • Product name CS • By Sales rep All Prod •	▼       •         •       Insert	Sales r → T → T ar ∞ er ∞ th ∞ suures	Product na Guarter or Measures P elma Te Ins Volume 123	me 123 ert Jan 2	Jan 2 1,220 2023 Sales 123	2023 Sales 123 33
FY23 Sales All ID Customer name FY23 Sale All ID Customer	S • By Sales rep All Prod • Product name CS • By Sales rep All Prod •	Y       (P)         Insert	Saloes rr Saloes rr T T T Saloes rr Saloes rr Saloes rr Saloes rr T T T T T T T T T T T T T	Product na Guarter or Month or Measures P elma Te Ins Volume 123	volume 123 ert Jan 2	Jan 2 1,220 Cus 2023 Sales 123	2023 Sales 123 31 tomer na
EFY23 Sales All ID EFY23 Sale All ID	S • By Sales rep All Prod • Product name CS • By Sales rep All Prod •	<ul> <li>The mathematical system</li> <li>Insert</li> <li>Insert</li> <li>Insert</li> <li>All Prod</li> <li>Ver</li> <li>Quark</li> <li>Mont</li> <li>Mont</li> <li>Most</li> <li>Sales rep</li> <li>O22 Telma</li> <li>O23 William</li> </ul>	Salos r Salos r sures Te	Product na Guarter or Messures P elema Te Ins Volume 123	me 123 ert Jan 2 1,961 1,413	Jan 2 1,220 Cus 2023 Sales 123	2023 Sales 123 34 tomer na 566,500 407,850
<ul> <li>FY23 Sales</li> <li>All ID</li> <li>Customer name</li> <li>FY23 Sale</li> <li>All ID</li> <li>Customer</li> <li>All ID</li> </ul>	S • By Sales rep All Prod  Product name  S • By Sales rep All Prod  All Prod  Tame  name	<ul> <li>▼ ⊕ →</li> <li>Insert</li> <li>Insert</li> <li>All Prod</li> <li>Yes</li> <li>Quart</li> <li>Mont</li> <li>Most</li> <li>Sales rep</li> <li>022 Telma</li> <li>023 William</li> <li>025 Charle</li> </ul>	Sales r Sales r Sales r sures th ∞ sures Te	Product na Guarter or Messures P elima Te Ins Volume 123	me 123 ert Jan 2 1,961 1,413 2,138	Jan 2 1,220 Cus 2023 Sales 123	2023 Sales 123 34 tomer na 566,500 407,850 635,200
<ul> <li>FY23 Sales</li> <li>All ID</li> <li>Customer name</li> <li>FY23 Sale</li> <li>All ID</li> <li>Customer</li> <li>All ID</li> </ul>	S • By Sales rep All Prod   Product name  S • By Sales rep All Prod  All Prod   name	<ul> <li>Insert</li> <li>Insert</li> <li>Insert</li> <li>All Prod</li> <li>Yes</li> <li>Quarte</li> <li>Mont</li> <li>Soles rep</li> <li>022 Telma</li> <li>023 William</li> <li>025 Charles</li> <li>024 Felicity</li> </ul>	Sales r → T → T Sales r → T → T → T Sures Sures T T 	Product na Guarter or Measures ap elma Te Ins Volume 123	me Volume 123 ert Jan 2 1,961 1,413 2,138 1,908	Jan 2 1,220 Cus 2023 Sales 123	2023 Sales 123 tomer na 566,500 407,850 635,200 546,175
<ul> <li>FY23 Sales</li> <li>All ID </li> <li>Customer name</li> <li>FY23 Sale</li> <li>All ID</li> <li>Customer</li> <li>All ID</li> </ul>	S • By Sales rep All Product name  C S • By Sales rep All Prod  All Prod  All Prod  All Prod  her name	<ul> <li>Insert</li> <li>Insert</li> <li>Insert</li> <li>All Prod</li> <li>Yes</li> <li>Quante</li> <li>Meat</li> <li>Sales rep</li> <li>022 Telma</li> <li>023 William</li> <li>025 Charles</li> <li>024 Felicity</li> <li>Telma</li> </ul>	Sales rr Sales rr T T Sales rr T Sales rr Sales rr T Sales rr Sales rr T C Sales rr Sales rr	Product na Quarter or Menth or Measures IP elma Te Ins Volume 123	me Volume 123 ert Jan 2 1,961 1,413 2,138 1,908 1,220	Jan 2 1,220 Cus 2023 Sales 123	2023 Sales 123 34 tomer na 566,500 407,850 635,200 546,175 353,125
<ul> <li>FY23 Sales</li> <li>All ID </li> <li>Customer name</li> <li>FY23 Sale</li> <li>All ID</li> <li>Customer</li> <li>All ID</li> </ul>	S • By Sales rep All Prod   Product name  CS • By Sales rep All Prod  Iname  her name	▼       →         Insert         Insert         All Prod         Yes         Quartet         Mont         Mont         022 Telma         023 William         024 Felicity         マ24 Felicity         マ23 William         023 William         023 William	Sales rr Sales rr ar $\infty$ ar $\infty$ th $\infty$ sures Te Te Te t	Product na Quarter © Month © Measures p elma Te Volume 123	me Volume 123 ert Jan 2 1,961 1,413 2,138 1,908 1,220	Jan 2 1,220 2023 Sales 123	2023 Sales 123 38 tomer na 566,500 407,850 635,200 546,175 353,125

:: FY23 Sales • By Sales rep

All ID 👻

A

Product siz

All Product size

Sales rep 022 Telma

023 William ...

025 Charles .. 024 Felicity F.



Jan 2023

49.500

9,600

353,125

49,500

47,500

50.400

353,125

Volu

123

196

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 ष add a single All totals summary level. Next we will build a multilevel hierarchy for our Sales rep and team dimension.

Quarter 🗠								0000
Month 👳	Jan :	2023	Feb :	2023	Mar	2023	· •	.023
Measures	Volume	Sales	Volume	Sales	Volume	Sales	Volume	Sales
Sales rep	123	123	123	123	123	123	123	
022 Telma Te	1,961	566,500					1,961	566,50
023 William	1,413	407,850					1,413	407,850
025 Charles	2,138	635,200					2,138	635,200
024 Felicity F	1,908	546,175					1,908	Σ 546,175

#### E FY23 Sales • By Sa All ID Year .... All Prod... - 100 Van... - Cust. ▼ All P Quarter 👳 Q1 2023 Marth at Mar 2023 100 Vanilla £ ... Jan 2 Meas 101 Choco Sales rep 102 Strawberry Te. 022 Telma 311 78,400 023 William 241 103 Coffee 241 58,300 308 025 Charles 308 76,500 104 Raspberry ripple 328 328 81,900 024 Felicity F... 200 M-



### 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  $\bigcirc$  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.

::	FY23 Sales	<ul> <li>By Sales rep</li> </ul>	에 후 주 =	
	All ID 👻	All Prod 🔻	All Prod 🔻	All Cust 💌
	Year 👳			
	Quarter 👳		[	
	Month ⇔	Jan 2	2023	Feb 2
	Measures	Volume	Sales	Volume
I	Sales rep	123	123	123
	022 Telma Te	1,961	566,500	
	023 William	1,413	407,850	
	025 Charles	2,138	635,200	
	024 Felicity F	<b></b> 1,908	546,175	

Measures	Volume	Sales
Sales rep	123	123
022 Telma Te	1,961	566,500
023 William	1,413	407,850
025 Charles	2,138	635,200
024 Felicity F		546,175
Sales re3		
Sales re2		
Sales re1		

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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).

Volume	Sales
123	123
1,961	566,500
1,413	407,850
2,138	635,200
1,908	546,175
	Volume 123 1,961 1,413 2,138 1,908

:: FY23 Sales • By Sales rep 👘 🖓 📻 📼

### (2) Group sales reps into their teams

To up 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.

	, ,	
All ID 📼	All Prod 💌	All Prod 👻
Year 🖘		
Quarter 🗢		
Month 😁	Jan 2	2023
Measures	Volume	Sales
Sales rep	123	123
	1,961	566,500
023 William	1,413	407,850
025 Charles	2,138	635,200
024 Felicity F	1,908	546,175
East		2
West	023 William	n Whisk
All Sales rep	Group under East	

Measures	Volume	Sales
> Sales rep	123	123
025 Charles Cone	2,138	635,200
024 Felicity Frost	1,908	546,175
▼ East	3,374	974,350
— 022 Telma Teaspoon	1,961	566,500
023 William Whisk	1,413	407,850
West		
All Sales rep		

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

		Volume	Sales
> Sales rep		123	123
025 Charles Cone		2,138	635,200
024 Felicity Frost		1,908	546,175
▼ East		3,374	974,350
— 022 Telma Teaspoon		1,961	566,500
023 William Whisk		1,413	407,850
West			2
All Sales rep	<del>ر</del> ې	024 Felicity F	rost
0	Gro	up under West	

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# (3) Group sales teams into the All totals level

Then left-click and hold to drag and

🕓 group West under All Sales rep.

Measures	Volume	Sales
> Sales rep	123	123
▼ East	3,374	974,350
— 022 Telma Teaspoon	1,961	566,500
023 William Whisk	1,413	407,850
▼ West	4,046	1,181,375
— 025 Charles Cone	2,138	635,200
024 Felicity Frost	1,908	546,175
All Sales rep		
	💪 West	· · · · · · · · · · · · · · · · · · ·

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.

Measures		Volume		Sales	
> > Sales rep		123		123	
- East			3,374	974,350	
— 022 Telma Teaspoon			1,961	566,500	
023 William Whisk			1,413	407,850	
<ul> <li>All Sales rep</li> </ul>			4,046	1,181,375	
– ▼ West	_	East	4,046	1,181,375	
— 025 Charles Cone	•		2,138	635,200	
— 024 Felicity Frost	Reord	ler befor	re West	546,175	

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  $\bigoplus$  and  $\bigoplus$  grouping, or  $\bowtie$  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.

# FY23	3 Sales	<ul> <li>By Sales rep</li> </ul>	41 Y 🗗			
All ID	-	All Prod 👻	All Prod	-	All C	ust 👻
		Year 👳				
		Quarter 👳				
		Month ⇔		Jan 2	023	
		Measures	Volume		Sales	
> >	Sales rep		123		123	
🔻 All S	ales rep		7,4	420	Σ 2	,155,725
- • E	ast		3,	374		974,350
	022 Telm	a Teaspoon	1,	961		566,500
	023 Willia	am Whisk	1,	413		407,850
_ <b>v</b>	Vest		4,	046	1	,181,375
	025 Char	les Cone	2,	138		635,200
	024 Felic	ity Frost	1,	908		546,175

### 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.

 fx
 Average sales price = FY23 Sales.Sales / FY23 Sales.Volume

 #
 FY23 Sales - By Sales rep

FY23 Sales - By Sales rep	<i>v</i> <sub>il</sub> ⊽ († =		
All ID 🔹 All Prod 💌	All Prod 👻	All Cust 🔻	+ Dimension
Year 👓			
Quarter ∞			
Month ∞		Jan 2023	
Measures	Volume	Average sales	es
> > Sales rep	123	f× \$ 123	23
<ul> <li>All Sales rep</li> </ul>	7,420	\$291	\$2,155,725
– ≖ East	3,374	\$289	\$974,350
— 022 Telma Teaspoon	1,961	\$289	\$566,500
023 William Whisk	1,413	\$289	\$407,850
_ ∞ West	4,046	\$292	\$1,181,375
— 025 Charles Cone	2,138	\$297	\$635,200
024 Felicity Frost	1,908	\$286	\$546,175

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*.

X The autocomplete will assist in finding the measures you need.

Measures	Volume	Average sales price=S		Volume	Mea
> > Sales rep	123			123	123
<ul> <li>All Sales rep</li> </ul>	Σ <b>7,420</b>	Sales			•
– ∞ East	3,374	Data			
— 022 Telma Teaspoon	1,961	Sales rep			
023 William Whisk	1,413	Data			
v West	4,046	Time Configuration.	Start Da	te	
— 025 Charles Cone	2,138	Data			
024 Felicity Frost	1,908	SIN 9	40,170		

X 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  $\Sigma$  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  $\Sigma$  summarize from the context menu.

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

X 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.

#### fx Average sales price=Sales/Volume :: FY23 Sales • By Sales rep 에 후 주 = All Prod... 👻 All Cust... 👻 All ID 👻 All Prod... 👻 + Dimension Jan 2023 Volume Average sales price=Sales/Volume > > Sales r All Sales rep 7,420 Volume 3,374 East 022 Telma Teaspoon 1,961 566,500 023 William Whisk 1.413 407.850 1,181,375 West 4,046 025 Charles Cone 2.138 635.200 024 Felicity Frost 1.908 546.175

Ales rep	Volume	Average sales price fx 123	Sales		
<ul> <li>All Sales rep</li> </ul>	7,420	<u>Σ</u> 192,500	= 2,155,725		
– ▼ East	3,374	87,500	974,350		





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# (3) Style average price measure to zero decimal places

If the measure popup is open, left-click  $\stackrel{\bullet}{\rightarrow}$  Style and update precision

to

🚆 📴 zero decimal places.

You can right-click the measure and A 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.







Year ∞ Quarter ∞				Format S	Summarize	Style	e Resi	e	×
Month ∞									
Measures	Volume	Average sales price	Sales	′≡ As List 🛛	🔁 Link to	existing	Dimension		
> > Sales rep	123	f× \$ 123	\$ 123						
<ul> <li>All Sales rep</li> </ul>	7,420	\$291	\$2,155,725	🚦 Data Type	<b>T</b> 123	Z	2 C	)	
East	3,374	\$289	\$974,350		_	-			
- 022 Telma Teaspoon	1,961	\$289	\$566,500	😰 Format	% \$	€	٤- 8	8	
023 William Whisk	1,413	\$289	\$407,850		_				
- v West	4,046	\$292	\$1,181,375	✓ Additional F	ormatting			Local Mea	isure @
- 025 Charles Cone	2,138	\$297	\$635,200						
024 Felicity Frost	1,908	\$286	\$546,175	🛄 Magnitude	x K	м	<u>B</u> 1	5	
				🖤 Default	Set Value	or	GD Link M	easure	



### 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.

🗄 FY23 Sa	les - By product	¢il ⊽ (†) =											
All ID	- Jan 2023 -	All Sales 👻	All Cust 👻	+ Dimension									
	Product size level2											All Product size	
	Product size		STD Standard			LRG Large			XXL Extra Large				
	Measures	Volume	Average sales	Sales	Volume	Average sales	Sales	Volume	Average sales	Sales	Volume	Average sales	Sales
> Product	name	123	f× \$ 123	\$ 123	123	f× \$ 123	\$ 123	123	f× \$ 123	\$ 123	123	f× \$ 123	\$ 123
100 Va	anilla	608	\$100	\$60,800	379	\$300	\$113,700	201	\$600	\$120,600	1,188	\$248	\$295,100
— 101 Cł	hocolate	637	\$100	\$63,700	381	\$300	\$114,300	193	\$600	\$115,800	1,211	\$243	\$293,800
- 102 St	rawberry	647	\$100	\$64,700	385	\$300	\$115,500	185	\$600	\$111,000	1,217	\$239	\$291,200
— 103 Co	offee	632	\$125	\$79,000	382	\$375	\$143,250	188	\$750	\$141,000	1,202	\$302	\$363,250
— 104 Ra	aspberry ripple	634	\$125	\$79,250	376	\$375	\$141,000	191	\$750	\$143,250	1,201	\$303	\$363,500
200 M	ango	374	\$150	\$56,100	215	\$450	\$96,750	105	\$900	\$94,500	694	\$356	\$247,350
— 201 Sa	alted caramel	370	\$175	\$64,750	223	\$525	\$117,075	114	\$1,050	\$119,700	707	\$426	\$301,525
All Produc	ct name	3,902	\$120	\$468,300	2,341	\$359	\$841,575	1,177	\$719	\$845,850	7,420	\$291	Σ \$2,155,725

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.

::	FY23 S	ales	By Sales rep	\$a ∑	Ţ			
	All ID	-	All Prod 🔻	All Pro	d	•	All Cust	-
			Year ⇔					
			Quarter 👳					

# FY23 Sal Duplicate s rep	41 Y 🗗 =	
	All Prod 🔻	All Cust 🔻
🗸 By Sales 📋 🖍 🔳		
Import		
		Jan 2023
+ Add new view	Volume	Average sales price
	123	f× \$ 123

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



### (2) Build the By product view



### arithmix<sup>A</sup>

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

	-+ I Sales +	All Cust 🔹	T Dimension
Year			
All Product size			
C+ Swap ∞		Jan 2023	
E Prod	duct size	Average sales price	Sales
> Product name	123	f× \$ 123	\$ 123
— 100 Vanilla	1,188	\$248	\$295,100
— 101 Chocolate	1,211	\$243	\$293,800
— 102 Strawberry	1,217	\$239	\$291,200
— 103 Coffee	1,202	\$302	\$363,250
— 104 Raspberry ripple	1,201	\$303	\$363,500
— 200 Mango	694	\$356	\$247,350
<ul> <li>201 Salted caramel</li> </ul>	707	\$426	\$301,525
All Product name	7,420	\$291	\$2,155,725

🗄 FY23 Sales • By product 🖓 🏹 拱

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.

FY23 Sales	<ul> <li>By product</li> </ul>	41 🍸 🕀 🖛				
All ID 👻	Jan 2023 🔺	== I Sales 👻	All Cust.	🔻	+ Dimen	sion
1	• 2023		TD Stan	dard		
	🔻 Q1 2	023	verage s	ales	Sales	
> Product name	🗸 Jan	2023	\$ 123		\$ 123	
— 100 Vanilla				\$100	\$60	,800
— 101 Chocola	a Feb	2023		\$100	\$63	,700
— 102 Strawbe	e Mai	2023		\$100	\$64	,700
— 103 Coffee	▼ Q2 2	023		\$125	\$79	,000
— 104 Raspbe	r			\$125	\$79	,250
— 200 Mango	Apr	2023		\$150	\$56	,100
— 201 Salted o	aramel	370		\$175	\$64	,750
All Product nam	ne	3,902		\$120	\$468	,300



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).

۵	Sales analysis	<del>ر</del> ه	¢	Ana	lysis	Confi	gure	Ð					
Con	tents Presets Q ≡<		f× Cor	nmissi	on costs	= Sale	s * Cor	nmissior	n drivers.Co	omm	ission rate		
✓ [	CIMENSIONS Customer name		FY23 S	Sales	By Sale     All Proc	es rep	r¦ıl ⊽ All Pr	' (†) == rod ▼	All Cust	•	+ Dimension		
• 1	Product name     Product size				Qu	vear ∞ arter ⇔							
	T Sales rep				Ν	Month ⇔				Jan	2023		
	Time				N	Aeasures	Volum	е	Average sa	les	Sales	Co	mmission
	I Thine		> > \$	Sales rep			123		f× \$ 123		\$ 123	fx	\$ 123
1	T Versions		<ul> <li>All Sale</li> </ul>	es rep				7,420	s	291	\$2,155,725	Σ	\$110,69
			– • Eas	t				3,374	\$	289	\$974,350		\$50,03
> 1	MEASURES		- 0	)22 Telr	na Teaspo	on		1,961	\$	289	\$566,500		\$29,11
~ 1	TABLES			23 Will	iam Whisk			1,413	\$	289	\$407,850		\$20,91
	Commission drivers		- v Wes	st				4,046	s	292	\$1,181,375		\$60,66
* 1	Commission unvers		_ 0	025 Cha	rles Cone			2,138	\$	297	\$635,200		\$32,54
	🕨 🛅 Time		c	024 Feli	city Frost			1,908	9	286	\$546,175		\$28,11
l	123 Commission rate     FY23 Sales     TI Invoice month		Comm	issioı	n driver	r <b>s</b> ∙ Up	Comm	ission rate	9				
	<ul> <li>T Customer name</li> </ul>						STD St	andard	LRG Large		XXL Extra Lar		
	<ul> <li>T Product name</li> </ul>		Jan 2023	3				2%		4%	8%		
	• T Product size		Feb 2023	3				2%		4%	8%		
			Mar 2023	3				2%		4%	8%		
	<ul> <li>123 Volume</li> </ul>		Apr 2023	3				2%		4%	8%		
	<ul> <li>123 Average sales price</li> </ul>		May 202	3				2%		4%	8%		
	• 123 Sales		Jun 2023	3				2%		4%	8%		
	123 Commission costs		Jul 2023					2%		4%	8%		
			Aug 2023	3				2%		4%	8%		
	<ul> <li>TI Sales rep</li> </ul>		Sep 2023	3				2%		4%	8%		
•	Time Configuration		Oct 2023	3				2%		4%	8%		
			Nov 2023	3				2%		4%	8%		
			Dec 2023	3				2%		4%	8%		

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.

Add/Import			
Select to add	×		
Table			Variant A
		Spend	\$413
Dimension		Impressions	8900
Columnar		Clicks	340
🐺 Import		Includes empt and Dimension	y Measures ns for you to
Time Series		set up yourse	lf -

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.

🔉 Sales analysis Analysis æ Q ≡< Presets б Contents V DIMENSIONS :: FY23 Sales - By Sales rep 4 Y F -T Customer nam All ID 🔹 All Prod... 👻 All Prod... - All Cust... T Product name Year T Product size T Sales rep 🕨 🛅 Time T Versions 7,420 \$291 E \$2,155,725 East 3.374 \$289 \$974.350 > MEASURES — 022 Telma Teaspo 1,961 \$289 \$566,500 023 William Whisk 1,413 \$289 \$407,850 V TABLES 4.046 \$292 \$1.181.375 West FY23 Sales 025 Charles Cone 2.138 \$297 \$635,200 024 Felicity Frost 1,908 \$286 \$546,175 • T Invoice month • T Customer name

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#### Table1 - View1

tr T Product name
 tr T Product size
 123 Volume
 123 Average sales price
 123 Sales
 tr T Sales rep
 T Sales rep



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).

II Table	<b>1</b> - Update	Re	ename			
🗸 Up	odate	6	2			
+ Ad	d new view			STD Sta	nd	LRG Large



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

X 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.

<sup>\*</sup> 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.

Commissi	on drivers		
+ Dimension			
	Level2		
	Product size	STD Stand	LRG Large





:: Commission drivers - Update 🛛 🖓 🖓 🖘

+ Dimension
Level2
Product size
STD Standard
LRG Large
XXL Extra Large
Commission rate
2%

:: Commission drivers - Update 🛛 🏹 🕁 🖛

+ Dimension	Level2					
	Product size	STD Stondard	L DC L arma	VVI Evtra Larga	* #	All Prod
Measures		STD Standard	LRG Large	XXL Extra Large		
Commission rate	% 123	2%	4%	8%	==	14%



IMENSIONS	• •				
Customer name	# FY23 Sales - By Sales rep	Kil Ÿ ⊕ ≕	All Ques		
Product name	All ID + All Prod +	All Prod 👻	All Cust 👻	+ Dimension	
Product size					
T Sales rep			Jan 2023		
Time		Volume	Average sales price	Sales	Volume
T All Time	<ul> <li>All Sales rep</li> </ul>	7,420	\$291	\$2,155,725	
Z Year	– 🔻 East	3,374	\$289	\$974,350	
T Quarter	022 Telma Teaspoon	1,961	\$289	\$566,500	
T Month	023 William Whisk	1,413	\$289	\$407,850	
	- West	4,046	\$292	\$1,181,375	
Date	<ul> <li>— 025 Charles Cone</li> </ul>	2,138	\$297	\$635,200	
Versions	024 Felicity Frost	1,908	\$286	\$546,175	
EASURES	Commission drivers	lpdate ≮il ⊽	ন ⇒		i All Prod
ABLES	Product size	STD Standard	LRG Large	XXL Extra Large	AllFloam
Commission drivers	Commission rate % 123	2%	4%	8%	= 14%
T Product size		+ Month			
122 Commission rate					

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).

Allocate existing values by	
• Duplicating values into ea	ch 🚍 Month
O Assigning values to 20	23-01 •
O Spreading values evenly a	cross 🚍 Month
Don't ado	Add to Table

:: Commission drivers - Update 🛛 🕅 🤝

		Level2				
Measures	> > Month ••	Product size	STD Standard	LRG Large	XXL Extra Large	
	Jan 2023		2%	4%	8%	14%
	— Feb 2023		2%	4%	8%	14%
	— Mar 2023		2%	4%	8%	14%
	- Q1 2023		6%	12%	24%	42%
	Apr 2023		2%	4%	8%	14%
	— May 2023		2%	4%	8%	14%
	— Jun 2023		2%	4%	8%	14%
	– + Q2 2023		6%	12%	24%	42%
Commission rate	Jul 2023		2%	4%	8%	14%
	— Aug 2023		2%	4%	8%	14%
	— Sep 2023		2%	4%	8%	14%
	– A Q3 2023		6%	12%	24%	42%
	Oct 2023		2%	4%	8%	14%
	- Nov 2023		2%	4%	8%	14%
	— Dec 2023		2%	4%	8%	14%
	– 🔺 Q4 2023		6%	12%	24%	42%
	a 2023		24%	48%	96%	168%

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

: Commission drivers - Update dil 🏹 🕀 =

		Level2				All Prod
	> > Month ∞	Product size	STD Standard	LRG Lar	Measures rge	
	Jan 2023		2%	4%	8%	14%
	— Feb 2023		2%	4%	8%	14%
	— Mar 2023		2%	4%	8%	14%
	▲ Q1 2023		6%	12%	24%	42%
	Apr 2023		2%	4%	8%	14%
	— May 2023		2%	4%	8%	14%
	— Jun 2023		2%	4%	8%	14%
	– 🔺 Q2 2023		6%	12%	24%	42%
Commission rate % 123	Jul 2023		2%	4%	8%	14%

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# To suppress the display of dimension levels, right-click the Product size dimension and **III** 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.

Commission d	lrivers - Up	pdate 🖓 🏹					
	Measures	Commission rate	9				
		% 123					
> > Month ∞	Product size	STD Standard	[==; I	arge	XXL Ext	ra Lar	
Jan 2023		2%		4%		8%	
— Feb 2023							
— Mar 2023		Format	Displa	У			×
- ≜ Q1 2023				_			
Apr 2023		C Display		_			
— May 2023		Ce Display				-	
Jun 2023		L. Order		Cummory I	irot s	ummory Lo	at 1
Q2 2023		→ Order		Summary r		ourinnar y La	51
Jul 2023		Chau			la		
— Aug 2023		G SHOW		Anteve			
— Sep 2023				🗋 Produ	ct size le	vel2	
– A Q3 2023				🗹 Produ	ct size		
Oct 2023							
— Nov 2023		-					
— Dec 2023		Filter er	npty sı	immary iten	ns 🔀		
– ≜ Q4 2023		6%		12%		24%	
▲ 2023		24%		48%		96%	

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:: Commission drivers - Update 🛛 🖓 🕁 🤿

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.

	Measures Commission	n rate				
	% 123					
Month	STD Standa	rd	LRG Large	XXL E	xtra Lar	
Jan 2023	==	2%	4%		8%	
Feb 2023						
Mar 2023	Format	Di	splay			$\times$
Apr 2023		-				
May 2023	E Display	,			-	
Jun 2023	ce Display				ч	_
Jul 2023	L. Order		Summary	Firet	Summary L	act
Aug 2023	G Older		Summary			ast
Sep 2023	P Show			ale		
Oct 2023	G SHOW		Anteve	15		
Nov 2023				ne		
Dec 2023			🗌 Year			
			🗌 Quart	er		
			🗹 Monti	n		
			🗖 Date			

### Step 8: Build a commission cost calculation measure



f× Commission costs = Sales	s * Commissior	n drivers.Commi	ission rate	
FY23 Sales - By Sales rep	ਯौ ⊽ क ≂			
All ID 🚽 All Prod 👻	All Prod 👻	All Cust 👻	+ Dimension	
Year 👓				
Quarter 👓				
Month ∞		Jan 2	2023	
Measures	Volume	Average sales	Sales	Commission
		price		costs
> > Sales rep	123	f× \$ 123	\$ 123	f× \$ 123
<ul> <li>All Sales rep</li> </ul>	7,420	\$291	\$2,155,725	Σ \$110,697
	~ ~ <b>-</b>	<u> </u>	AA74 AFA	AFA 445

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  $\bigcirc$  add a new measure.



fx Commission cost=Sales\*Commission drivers.Commission rate

 FY23 Sales - By Sales rep	All Prod ▼	All Cust 👻	+ Dimension		
Year 👓					
Quarter 👓					
Month 👓		Jan :	2023		
Measures	Volume	Average sales	Sales	drivers Commi	ssion rate
> > Sales rep	123	f× \$ 123	\$ 123	unvers.comm	3310111816
	7,420	\$291	\$2,155,725		
– = East	3,374	\$289	\$974,350		
— 022 Telma Teaspoon	1,961	\$289	\$566,500		
023 William Whisk	1,413	\$289	\$407,850		
- v West	4,046	\$292	\$1,181,375		
— 025 Charles Cone	2,138	\$297	\$635,200		
024 Felicity Frost	1,908	\$286	\$546,175		

Commission drivers - Update

 Commission rate

 STD Standard
 LRG Large
 XXL Extra Lar...

 Jan 2023
 2%
 4%
 8%

Left-click Measure1 and edit (start typing) to 2 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 <u>here</u>.* 

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.

f× Commission costs = Sale	s * Commission	drivers.Comm	ission rate	
III     FY23 Sales - By Sales rep       All ID     All Prod	All Prod ▼	All Cust 💌	+ Dimension	
Quarter ∞				
Month ∞		Jan 2	2023	
Measures	Volume	Average sales price	Sales	Commission costs
> > Sales rep	123	f× \$ 123	\$ 123	<i>f</i> × \$ 123
✓ All Sales rep	7,420	\$291	\$2,155,725	Σ <b>\$110,697</b>
– ⊸ East	3,374	\$289	\$974,350	\$50,035
— 022 Telma Teaspoon	1,961	\$289	\$566,500	\$29,117
023 William Whisk	1,413	\$289	\$407,850	\$20,918
- ▼ West	4,046	\$292	\$1,181,375	\$60,663
— 025 Charles Cone	2,138	\$297	\$635,200	\$32,549
024 Felicity Frost	1,908	\$286	\$546,175	\$28,114

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

?)	<ul> <li>In this Part 4 your will learn:</li> <li>Importing into an existing table.</li> <li>Using table display to add a chart table view.</li> </ul>
	<ul><li>Adding a new dashboard.</li><li>Reusing tables from the Contents panel.</li></ul>

### 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 rimport.



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

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

:: FY23 Sales • By Sales rep	\$ <b>1 1 1 1</b>			
All ID  All Prod Year	Import/Export	×	nsion	
Quarter	Import CSV			
Ales rep	Export CSV			Commission costs f× \$ 123
<ul> <li>All Sales rep</li> </ul>	•		5,725	\$110,697

Left-click <sup>The Map import data</sup> 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 when ready.

Import into FY23 Sales From February 2023 sales from CRM.csv							
Start import at row		1					
瞕 Map import data			^				
Columns to import		Select how to import					
Invoice number	$\rightarrow$	F+ Create new Measure -					
✓ Invoice month	$\rightarrow$	co Month 🗸					
Customer name	$\rightarrow$	co Customer name 🗸					
Product name	$\rightarrow$	-> Product name -					
Product size	$\rightarrow$	-> Product size -					
G∋ Update linked Dimension	ons 🛛	Add new items 🝷					
Configure import time r		~					
Importing 462 rows of data.							
	•	• Cancel Ne	ext				

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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).
- when ready. Click Import

💐 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 **III** columns and Sales rep, Customer name and Time dimensions in 🛡 pages.

 $\Box$  duplicate and  $\checkmark$  rename to By product chart.

To prepare the table view for out by product chart:

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

Impo From	Import into FY23 Sales From February 2023 sales from CRM.csv						
🕰 In	port new data by:						
۲	Adding new data to table	9					
0	Replacing all data in table	е					
0	Adding a new version to	table 🚯					
Importin	g 462 rows of data.						
<	- Back	•	Cancel	Import			



Year 👳								
Quarter 🗠								
Month 👓		Jan 2023		Feb 2023				
Measures	Volume	Average sales price	Sales	Commission costs	Volume	Average sales price	Sales	Commission costs
> Sales rep	123	f× \$ 123	\$ 123	f× \$ 123	123	f× \$ 123		f× \$ 123
<ul> <li>All Sales rep</li> </ul>	7,420	\$291	\$2,155,725	\$110,697	8,227	\$296	ε \$2,435,700	≕ \$125,465
East	3,374	\$289	\$974,350	\$50,035	3,804	\$295	\$1,122,725	\$57,837
<ul> <li>— 022 Telma Teaspoon</li> </ul>	1,961	\$289	\$566,500	\$29,117	2,138	\$293	\$627,200	\$32,331
023 William Whisk	1,413	\$289	\$407,850	\$20,918	1,666	\$297	\$495,525	\$25,506
- v West	4,046	\$292	\$1,181,375	\$60,663	4,423	\$297	\$1,312,975	\$67,628
<ul> <li>— 025 Charles Cone</li> </ul>	2,138	\$297	\$635,200	\$32,549	2,246	\$299	\$671,350	\$34,586
024 Felicity Frost	1,908	\$286	\$546,175	\$28,114	2,177	\$295	\$641,625	\$33,042

FY23 Sales • By product	ran y 👘 📼
	All Sales 🔻 All Cust 🔻
✓ By product	
By Sales rep	STD St
FY23 Sales • By product (c	copy) 🖓 🖓 🖓 📼
FY23 Sales • By product (c	copy) ⊄il ♀ ♠ = Il Sales ▼ All Cust ▼
By product	copy) II Sales ▼ All Cust ▼
By product	copy) 수대 및 후 ᆕ II Sales ♥ All Cust ♥ STD St
By product ← By product ← By Sales rep	copy) Il Sales ▼ All Cust ▼ Il Sales ▼ All Cust ▼ STD St lume Average sales price
By product By product Chart By Sales rep	copy) I Sales ▼ All Cust ▼ II Sales ▼ All Cust ▼ STD St Iume Average sales price

÷	FY23 Sales	<ul> <li>By product cha</li> </ul>	rt 🖓 🖓 🗇		
	All ID 👻	Jan 2023	All Sales 🚩	All Cust 👻	ff Swap
		Product sizes vet	oduct size		
		Product size		STD St	andard
		Measures	Volume	Average sales price	Sales
	> Product name		123	f× \$ 123	\$ 123
	100 Vanilla		608	\$100	\$60,800

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



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- 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.



4 Y F

:: FY23 Sales • By product chart

Month 👳	Jan 2023						
	Volume	Average sales price fx \$ 123	<b>Sales</b> \$ 123	Commission costs f× \$ 123	Volume	Average s price f× \$ 123	
	7,420	\$291	\$2,155,725	\$110,697	8,227	:	

3	🗄 FY23 Sales + By Product chart 🛛 👘 🐺 👘 🚍								
	All ID		All Prod 👻	AI	I Sale 🔻	All Cust 👻	All Prod 👻	Volume "	•
		Month	Jan 2023	Feb 2023		Mar 2023	Apr 2023	May 2023	
			7,420	==	8,227				



7,420

8,227

### arithmix 🗛

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

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

🏁 The . Խ 🖾 Layout for 🗮 rows, Ⅲ

columns and pages can be used to move all dimensions around.

The  $\Sigma$  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  $\sum$  resize the new chart.

FY23 Sales • By product chart	🐔 🍸 🕀 🖛	7
All ID	Display	×
0	🛐 Mode	Bar chart
2023-01	🚺 Layout	Pages
O		► ID All ID -
Commission drivers • Upd		Product size     All Pro
		► Sales rep All Sale ▼
		Customer name     All Cus
		Product name     All Pro
Jan 2023		Show more 💌
Feb 2023 Mar 2023		E Rows
Apr 2023		
May 2023		
Jun 2023		
Jul 2023		▶ Month
Aug 2023		Σ Summary
Oct 2023		
Nov 2023		
Dec 2023	270	470 070 1



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 the move to the left of Analysis (drop to the left of the header, the blue indicator will help guide).

۵	Sales analysis	₅ с <del>•</del>	Analysis	Configure	Analysis (copy)	8
:=	f×		🖬 Anal	ysis (copy)		

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Analysis

🔏 Rename

Right-click and  $\checkmark$  rename the dashboard to Summary.

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

**E** open the Contents panel.

To remove the Commission drivers

table you can left-click and hold  $^{\rm II}$  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.

Sales analysis æ Summary Presets Q =< f× V DIMENSIONS FY23 Sales - By product chart T Customer name All Sales... -All ID All Prod... 👻 All Cust... -All Prod Volume ▶ **T** Product size 9,000 T Sales ren 8,000 ▶ 🖬 Time 7,000 T Versions 6,000 5,000 > MEASURES 4,000 V TABLES 3.000 🗐 Commission drivers 🖪 🕶 2,000 T Product size 1,000 • 123 Commission rate 0 🕨 🖬 Time 2023-01 FY23 Sales Time Configuration :: Commission drivers - Update 4 Y F ---Commission driv Commiss

Summar

Sales analysis

f×

:=



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 <u>here</u>.* 

	<i>.</i>	
FY23 Sales - By product	MiY M =	
	All Sales 👻	All Cust 👻
<ul> <li>By product</li> </ul>		
By product chart		STD St
By Sales rep	'olume	Average sales price
Import	1,270	\$100
+ Add new view	1,318	\$100
L	1,314	\$100
— 103 Coffee	1,294	\$125
<ul> <li>— 104 Raspberry ripple</li> </ul>	1,308	\$125
— 200 Mango	879	\$150
<ul> <li>201 Salted caramel</li> </ul>	857	\$175
All Product name	8,240	\$121

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### 💥 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.* 

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



#### FY23 Sales · By Sales rep

All ID 

All Prod... 

All Cust...

		Jan 2023							
		Volume	Average sales price	Sales	Commission costs	Volume	i		
- /	All Sales rep	1,188	\$248	\$295,100	\$15,412	1,267	Γ		
+	• East	552	\$248	\$136,700	\$7,090	578			
	<ul> <li>— 022 Telma Teaspoon</li> </ul>	311	\$252	\$78,400	\$4,100	320			
	<ul> <li>023 William Whisk</li> </ul>	241	\$242	\$58,300	\$2,990	258			
L	• West	636	\$249	\$158,400	\$8,322	689			
	<ul> <li>— 025 Charles Cone</li> </ul>	308	\$248	\$76,500	\$4,014	339			
	024 Felicity Frost	328	\$250	\$81,900	\$4,308	350			



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.