



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 .

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Exercise overview and test questions

About Delightful Mix

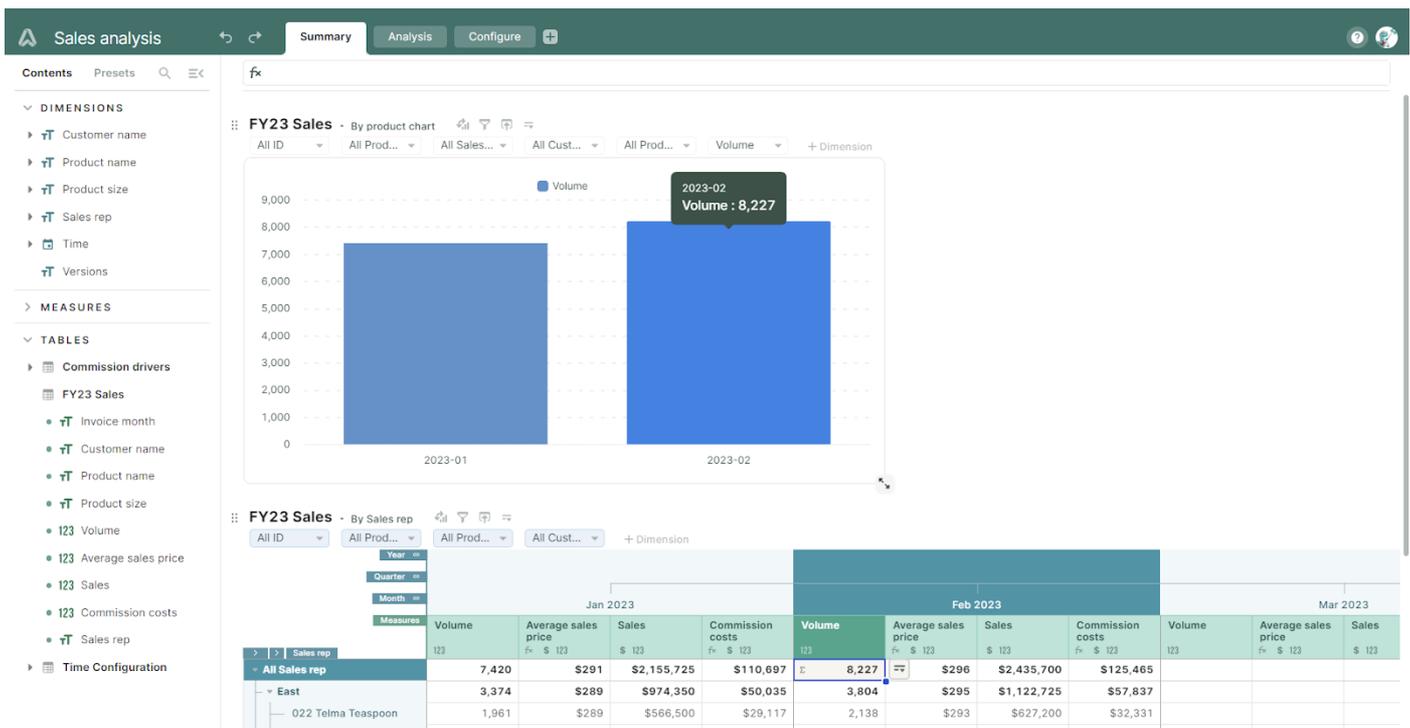


Delightful Mix manufactures and distributes various flavors of ice cream and related equipment and services.

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



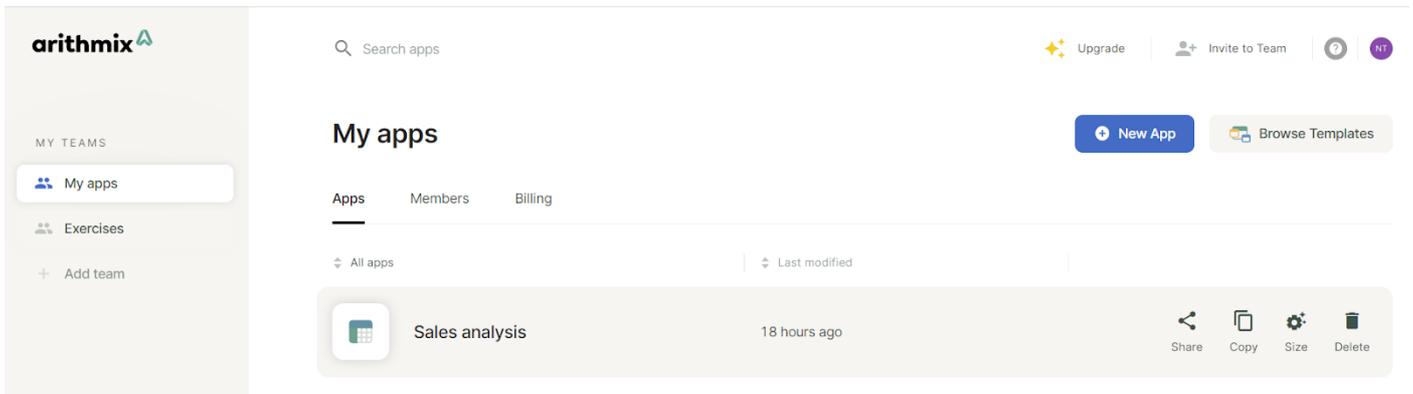
In this Part 1 your will learn:

- 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

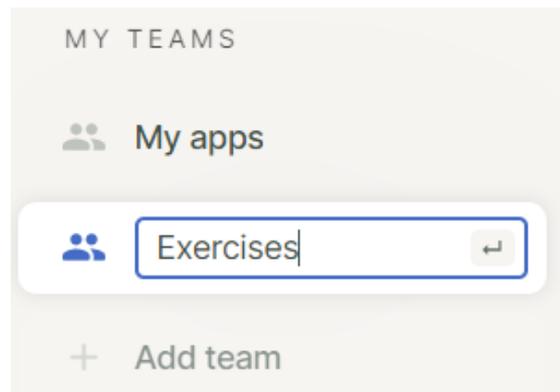
(1) Add team for exercises

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.*

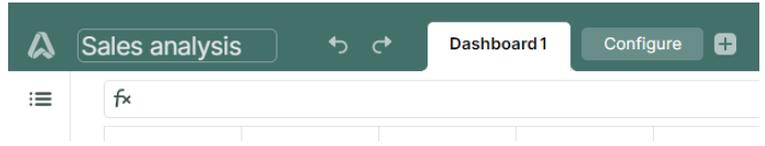
 *To invite members to the team so they can access the apps, use*

 **Invite to Team**



(2) Add new app and update the app name

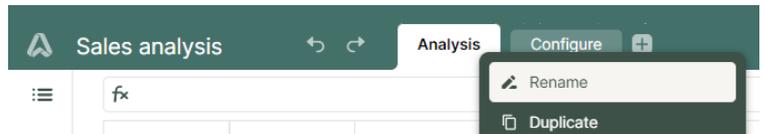
Click  to add your app. Double left-click into the app name to update the default to Sales analysis.



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

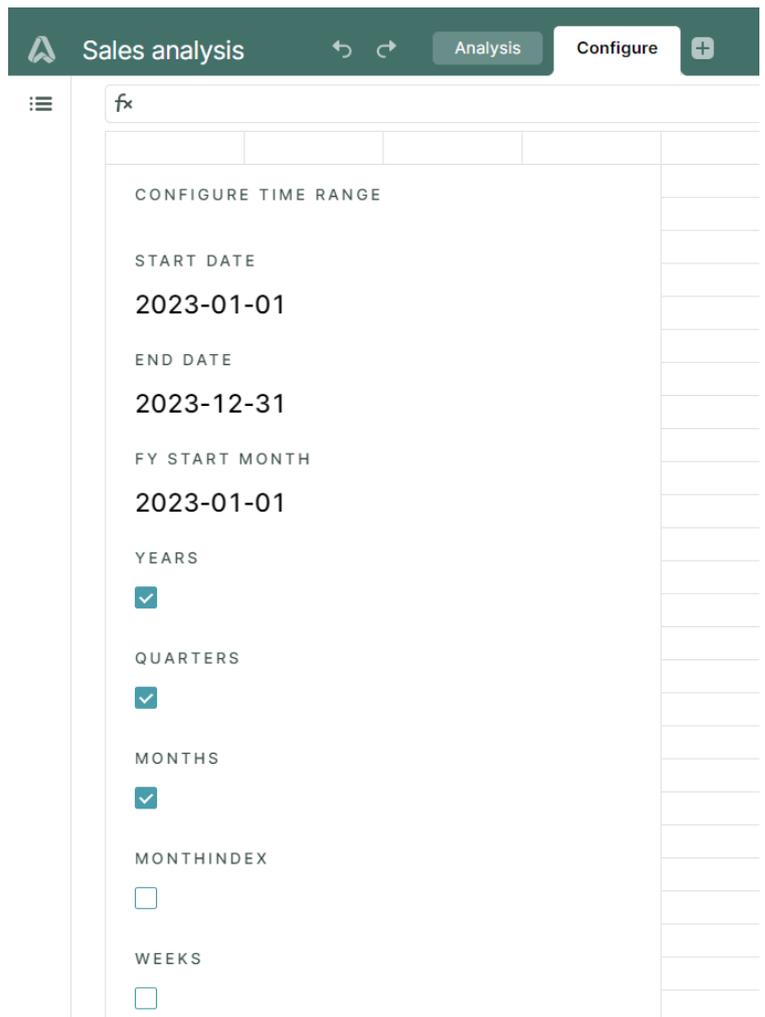
(3) Rename dashboard

 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.

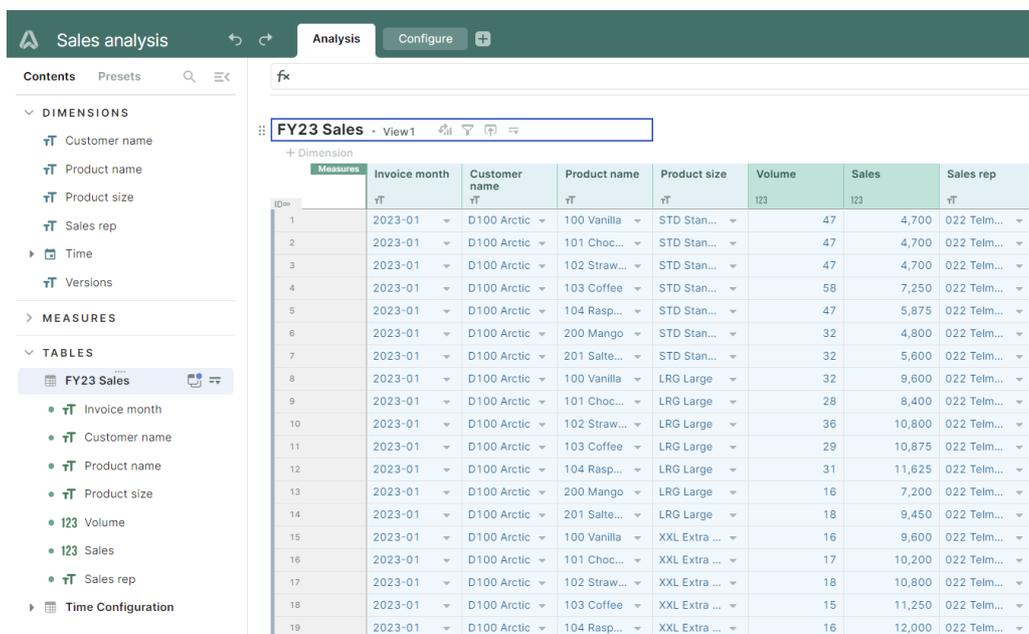


When using your data, update to your preferred time range and level (if you import data with time outside the range, the app will check and allow you to update dynamically).

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:

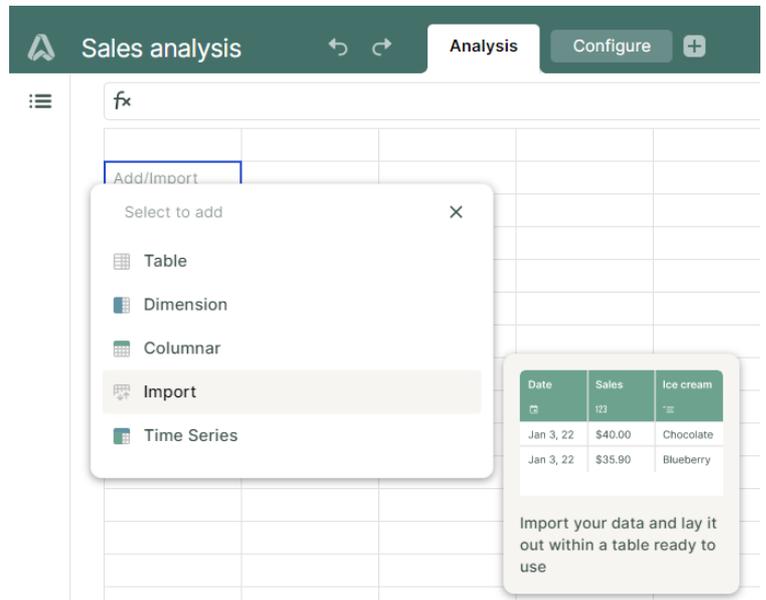
- Dimensions of like-items are limited to summary calculations like subtotals and totals of the dimension items (e.g. sales reps subtotal to sales teams which total to all sales reps/teams).
- The measures dimension hold all values - data entry, calculations and functions - by the dimensions.

(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.



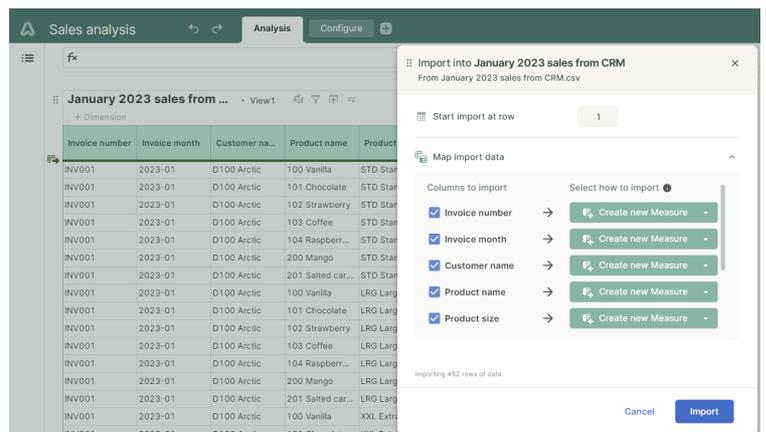
The import popup will appear with a preview of the CSV file. Expand



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.

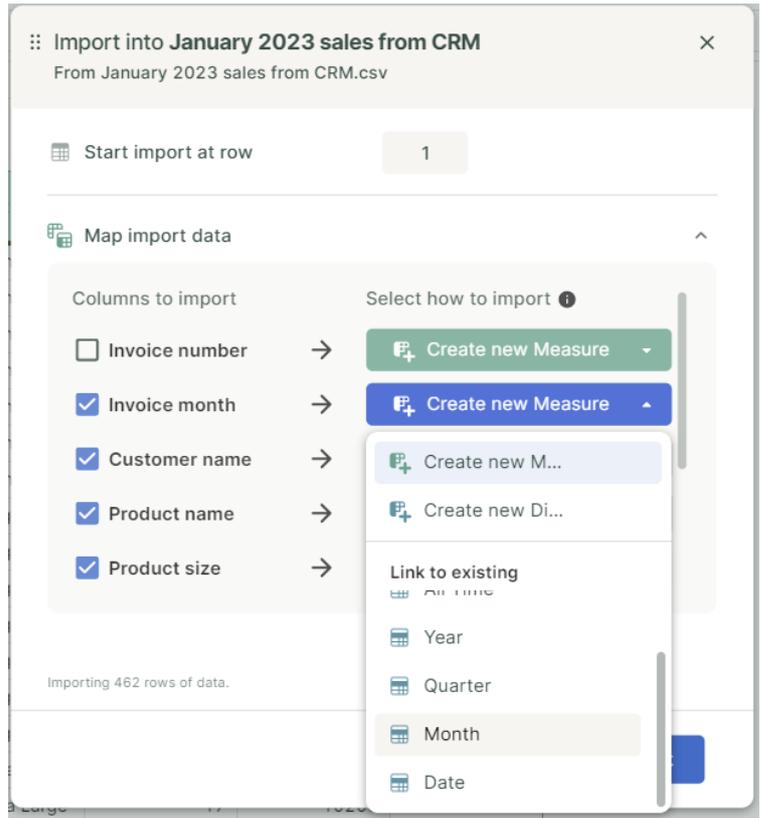
You can create and link to dimensions from measures at any time in app building.



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

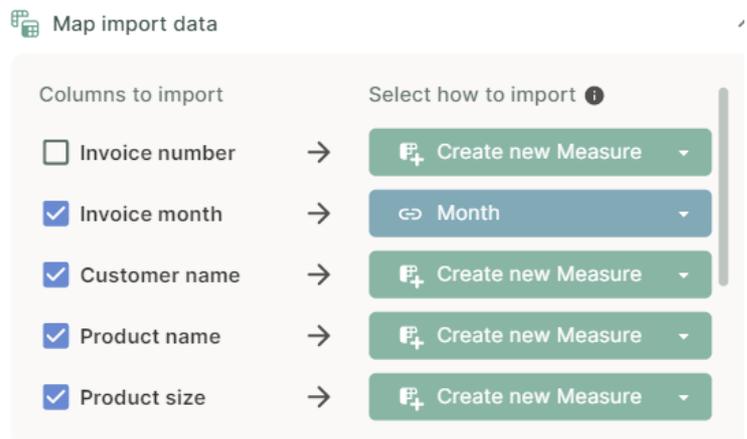
In the import popup you will:

- 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.

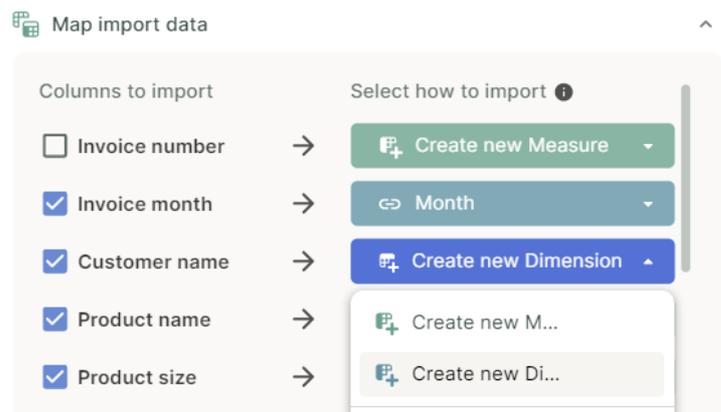


Left-click Invoice month

 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



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



 *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

Create new Measure

- Accept the default Add new items update option and click Import 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).

January 2023 sales from ... - View1

		Measures		+ Dimension				
ID		Invoice month	Customer name	Product name	Product size	Volume	Sales	Sales rep
1		2023-01	D100 Arctic	100 Vanilla	STD Stan...	47	4,700	022 Telm...
2		2023-01	D100 Arctic	101 Choc...	STD Stan...	47	4,700	022 Telm...
3		2023-01	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    

+ Dimension

	Measures	Invoice month	Customer name	Product name	Product size	Volume	Sales	Sales rep
ID		τT	τT	τT	τT	123	123	τT
1		2023-01	D100 Arctic	100 Vanilla	STD Star	47	4,700	022 Telm...
2		2023-01	D100 Arctic	101 Choc...			4,700	022 Telm...
3		2023-01	D100 Arctic	102 Straw...			4,700	022 Telm...
4		2023-01	D100 Arctic	103 Coffee			7,250	022 Telm...
5		2023-01	D100 Arctic	104 Rasp...			5,875	022 Telm...
6		2023-01	D100 Arctic	200 Mango			4,800	022 Telm...
7		2023-01	D100 Arctic	201 Salte...			5,600	022 Telm...
8		2023-01	D100 Arctic	100 Vanilla	LRG Large	32	9,600	022 Telm...

✓ STD Standard  

LRG Large

XXL Extra Large

+ Add new

 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.

459	2023-01	R201 Lava	103 Coffee	XXL Extra ...	6	4,500	023 Willia...
460	2023-01	R201 Lava	104 Rasp...	XXL Extra ...	6	4,500	023 Willia...
461	2023-01	R201 Lava	200 Mango	XXL Extra ...	3	2,700	023 Willia...
462	2023-01	R201 Lava	201 Salte...	XXL Extra ...	3	3,150	023 Willia...
All ID					7,420	Σ 2,155,725	

 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.

FY23 Sales

+ Dimension

	Measures	Invoice month	Customer name	Product name
ID		τT	τT	τT
1		2023-01	D100 Arctic	100 Vanilla
2		2023-01	D100 Arctic	101 Choc...
3		2023-01	D100 Arctic	102 Straw...

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    

Import

✓ View1

+ Add new view

Customer name	Product name
τT	τT
D100 Arctic	100 Vanilla
D100 Arctic	101 Choc...
D100 Arctic	102 Straw...

(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.

Invoice month	Customer name	Product name	Product size	Volume	Sales	Sales rep
2023-01	D100 Arctic	100 Vanilla	STD Stan...	47	4,700	022 Telem...
2023-01	D100 Arctic	101 Choc...	STD Stan...	47	4,700	022 Telem...
2023-01	D100 Arctic	102 Straw...	STD Stan...	47	4,700	022 Telem...
2023-01	D100 Arctic	103 Coffee	STD Stan...	58	7,250	022 Telem...
2023-01	D100 Arctic	104 Rasp...	STD Stan...	47	5,875	022 Telem...
2023-01	D100 Arctic	200 Mango	STD Stan...	32	4,800	022 Telem...
2023-01	D100 Arctic	201 Sait...	STD Stan...	32	5,600	022 Telem...
2023-01	D100 Arctic	100 Vanilla	LRG Large	32	9,600	022 Telem...
2023-01	D100 Arctic	101 Choc...	LRG Large	28	8,400	022 Telem...
2023-01	D100 Arctic	102 Straw...	LRG Large	36	10,800	022 Telem...
2023-01	D100 Arctic	103 Coffee	LRG Large	29	10,875	022 Telem...
2023-01	D100 Arctic	104 Rasp...	LRG Large	31	11,625	022 Telem...
2023-01	D100 Arctic	200 Mango	LRG Large	16	7,200	022 Telem...
2023-01	D100 Arctic	201 Sait...	LRG Large	18	9,450	022 Telem...
2023-01	D100 Arctic	100 Vanilla	XXL Extra	16	9,600	022 Telem...
2023-01	D100 Arctic	101 Choc...	XXL Extra	17	10,200	022 Telem...
2023-01	D100 Arctic	102 Straw...	XXL Extra	16	10,800	022 Telem...
2023-01	D100 Arctic	103 Coffee	XXL Extra	15	11,250	022 Telem...
2023-01	D100 Arctic	104 Rasp...	XXL Extra	16	12,000	022 Telem...

TABLES

- FY23 Sales**
- Invoice month
- Customer name
- Product name
- Product size
- Volume
- Sales
- Sales rep



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 you 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).

FY23 Sales • By Sales rep     + Dimension

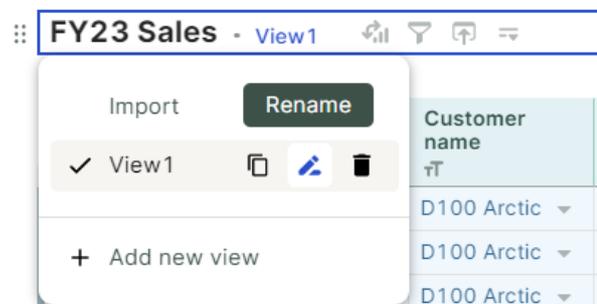
Measures	Jan 2023						Q1 2023	
	Volume		Sales		Volume		Sales	
	123	123	123	123	123	123	123	123
022 Telma Te...	1,961	566,500					1,961	566,500
023 William ...	1,413	407,850					1,413	407,850
025 Charles ...	2,138	635,200					2,138	635,200
024 Felicity F...	1,908	546,175					1,908	Σ 546,175

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  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.*

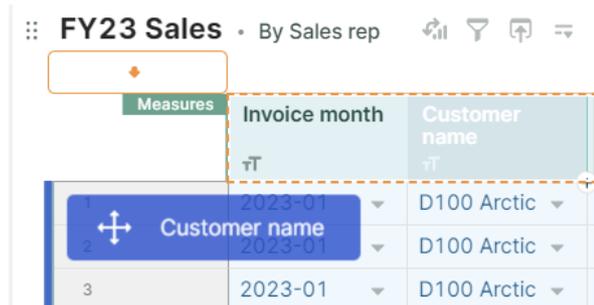


(2) Move dimensions to rows

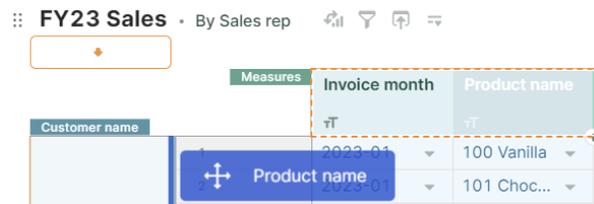
Left-click and hold the Customer name dimension and  move to  rows.



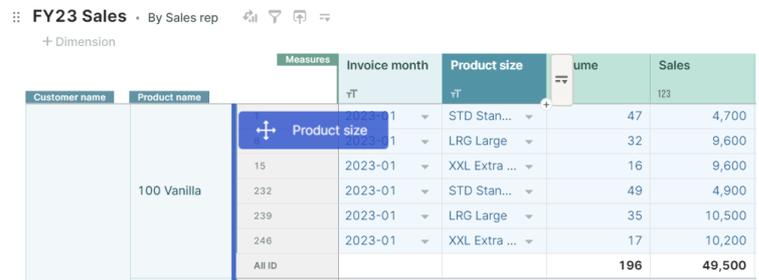
Repeat for Product name.



Repeat for Product size.



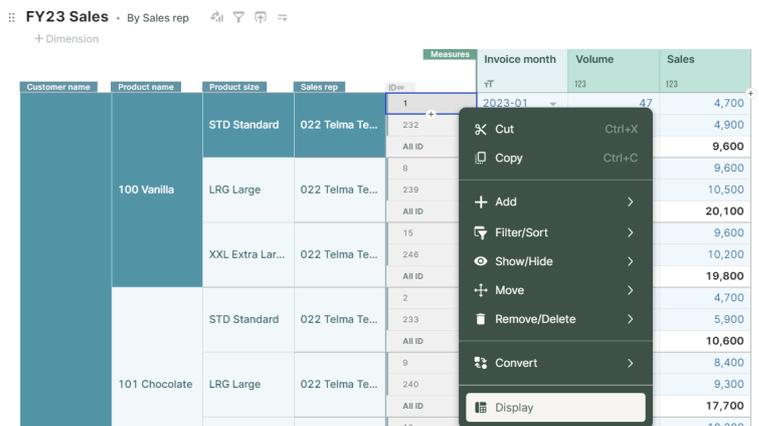
Finally, repeat for Sales rep.



 *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.

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

Customer name	Product name	Product size	Sales rep	All ID	Invoice month	Volume	Sales	
100 Vanilla		STD Standard	022 Telma Te...	All ID		96	9,600	
		LRG Large	022 Telma Te...	All ID				
		XXL Extra Lar...	022 Telma Te...	All ID				
101 Chocolate		STD Standard	022 Telma Te...	All ID				
		LRG Large	022 Telma Te...	All ID				
		XXL Extra Lar...	022 Telma Te...	All ID				
102 Strawber...		STD Standard	022 Telma Te...	All ID				
		LRG Large	022 Telma Te...	All ID				
		XXL Extra Lar...	022 Telma Te...	All ID				
D100 Arctic	103 Coffee	LRG Large	022 Telma Te...	All ID				
		XXL Extra Lar...	022 Telma Te...	All ID				
		STD Standard	022 Telma Te...	All ID				
							123	123
							20,100	20,100
							500	500
							400	400
							500	500
							125	125
							250	250
							875	875

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.

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

Customer name	Product name	Product size	Sales rep	Q1 2023	
				Volume	Sales
			022 Telma Te...	96	9,600
			023 William ...		

The imported transactional data, now viewed by dimensions, is fairly sparse. For example only Telma sells to our Arctic 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.

FY23 Sales • By Sales rep

All ID + Dimension

Year	Quarter	Month	Measures
		Jan 2023	Volume Sales
			123 123
			96 9,600
			17 20,100
			3 19,800
			106 10,600

Customer name Product name Product size Sales rep

100 Vanilla STD Standard

022 Telma Te... 023 William ... 025 Charles ... 024 Felicity F...

+ Summary Level

Add new

Search existing dimensions

Versions

FY23 Sales • By Sales rep

All ID + Dimension

Year	Quarter	Month	Measures
		Jan 2023	Volume Sales
			123 123
			196 49,500
			197 47,500

Customer name Product name Product size Sales rep

100 Vanilla All Product size

022 Telma Te... 023 William ... 025 Charles ... 024 Felicity F... 022 Telma Te...

FY23 Sales • By Sales rep

All ID + Dimension

Year	Quarter	Month	Measures
		Jan 2023	Volume Sales
			123 123
			196 49,500
			67 20,100
			33 19,800
			197 47,500

Customer name Product name Product size Sales rep

100 Vanilla All Product size

022 Telma Te... 023 William ... 025 Charles ... 024 Felicity F... 022 Telma Te...

Format Display

Display

Order Summary First Summary Last

Show All Levels Product size level2 Product size

Filter empty summary items

Then left-click and hold Product size

and move pages.

Customer name	Product name	Product size	Sales rep	Volume	Sales
		All Product size	022 Telma Te...	196	49,500
			023 William ...		
			025 Charles ...		
			024 Felicity F...		
			Telma Te...	96	9,600

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.

Customer name	Product name	Sales rep	Volume	Sales
	All Product name	Telma Te...	1,220	353,125
		023 William ...		
		025 Charles ...		
		024 Felicity F...		
			196	49,500
			197	47,500
			204	50,400

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

Customer name	Product name	Sales rep	Volume	Sales
		Telma Te...	1,220	353,125

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.

Customer name	Sales rep	Volume	Sales	Volur
All Customer name	022 Telma Te...	1,961	566,500	
	023 William ...	1,413	407,850	
	025 Charles ...	2,138	635,200	
	024 Felicity F...	1,908	546,175	
	Telma Te...	1,220	353,125	
D100 Arctic	023 William ...			
	025 Charles ...			

Take Note 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.

Measures	Jan 2023			Feb 2023			Mar 2023			Q1 2023	
	Volume	Sales		Volume	Sales		Volume	Sales		Volume	Sales
Sales rep	123	123	123	123	123	123	123	123	123	1,961	566,500
022 Telma Te...		1,961	566,500							1,413	407,850
023 William ...		2,138	635,200							2,138	635,200
024 Felicity F...		1,908	546,175							1,908	546,175

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

Measures	Jan 2023			Feb 2023			Mar 2023			Q1 2023	
	Volume	Sales		Volume	Sales		Volume	Sales		Volume	Sales
Sales rep	123	311	78,400							311	78,400
022 Telma Te...		241	58,300							241	58,300
023 William ...		308	76,500							308	76,500
024 Felicity F...		328	81,900							328	81,900

➔ 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.*

FY23 Sales • By Sales rep

Filters: All ID, All Prod..., All Prod..., All Cust...

Dimensions: Year, Quarter, Month (Jan 2023, Feb...)

Measures: Volume, Sales, Volume

Sales rep	Volume	Sales	Volume
123	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... 	1,908	546,175	

Sales rep	Volume	Sales
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... 	1,908	546,175
Sales re3		
Sales re2		
Sales re1 		

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		
022 Telma Te...	1,961	566,500
023 William ...	1,413	407,850
025 Charles ...	2,138	635,200
024 Felicity F...	1,908	546,175
East		
West		
All Sales rep		

(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.

The screenshot shows the 'FY23 Sales' table with filters for 'All ID', 'All Prod...', and 'All Prod...'. The date is set to 'Jan 2023'. The table data is the same as in the previous image. A blue box highlights '023 William Whisk' with a group icon and a '2' badge. A tooltip 'Group under East' is visible below it.

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

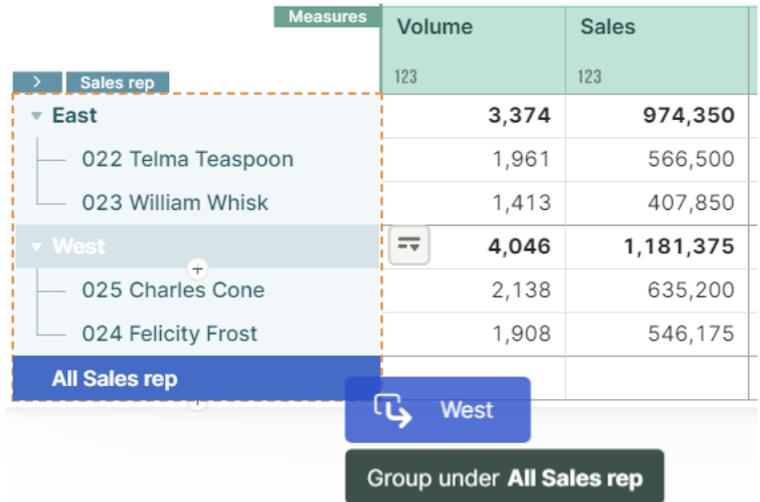
	Volume	Sales
123		
025 Charles Cone	2,138	635,200
024 Felicity Frost	1,908	546,175
East	3,374	974,350
022 Telma Teaspoon	1,961	566,500
023 William Whisk	1,413	407,850
West		
All Sales rep		

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

The screenshot shows the 'FY23 Sales' table with the same data as the previous image. A blue box highlights '024 Felicity Frost' with a group icon and a '2' badge. A tooltip 'Group under West' is visible below it.

(3) Group sales teams into the All totals level

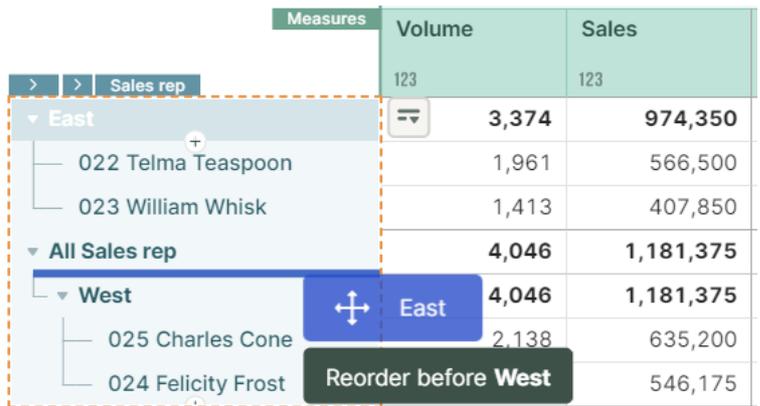
Then left-click and hold to drag and  group West under All Sales rep.



	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			

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.



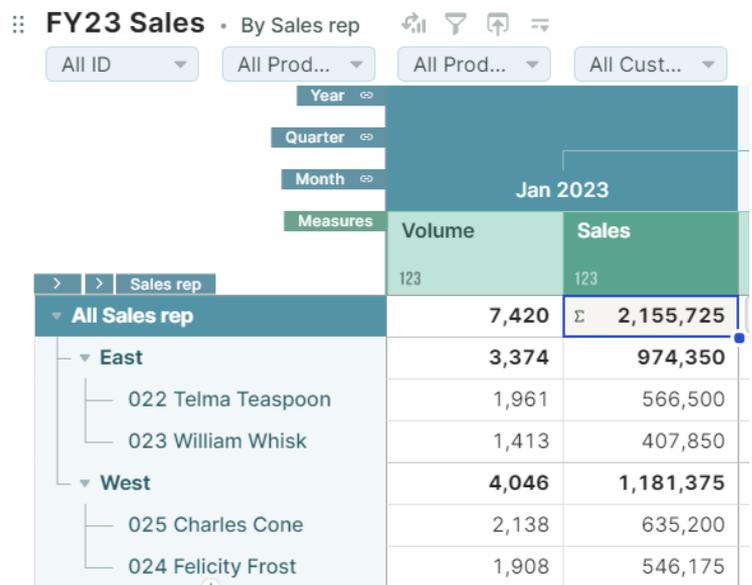
	Measures	Volume	Sales
> > Sales rep	123	123	
▼ East		3,374	974,350
022 Telma Teaspoon		1,961	566,500
023 William Whisk		1,413	407,850
▼ All Sales rep		4,046	1,181,375
▼ West		4,046	1,181,375
025 Charles Cone		2,138	635,200
024 Felicity Frost		1,908	546,175

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  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.



⋮ **FY23 Sales** • By Sales rep    

All ID ▾ All Prod... ▾ All Prod... ▾ All Cust... ▾

Year ∞

Quarter ∞

Month ∞

Jan 2023

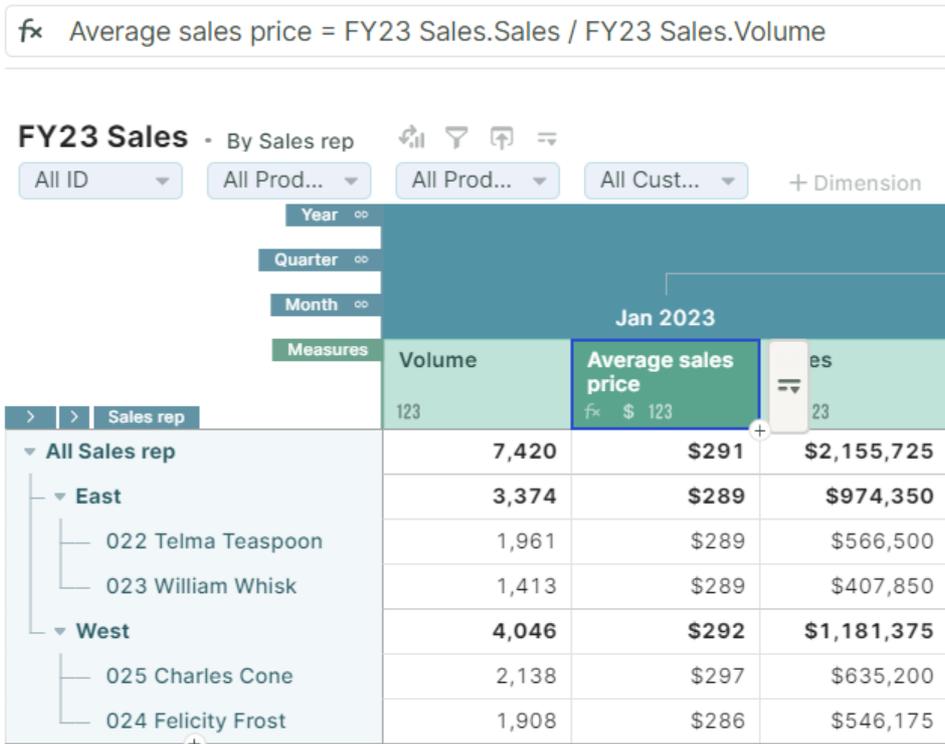
	Measures	Volume	Sales
> > Sales rep	123	123	
▼ All Sales rep		7,420	Σ 2,155,725
▼ East		3,374	974,350
022 Telma Teaspoon		1,961	566,500
023 William Whisk		1,413	407,850
▼ West		4,046	1,181,375
025 Charles Cone		2,138	635,200
024 Felicity Frost		1,908	546,175

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

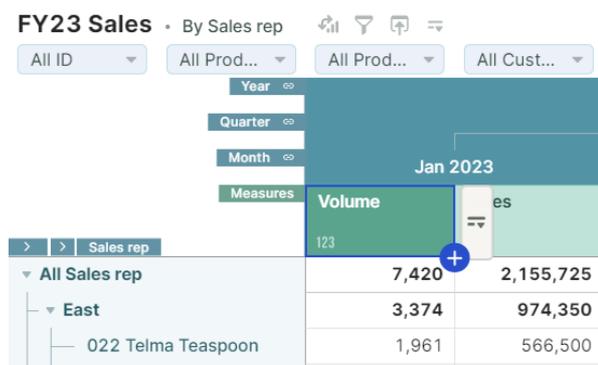


Year	Quarter	Month	Measures
Jan 2023			
			Volume
			Average sales price
			Sales
			123
			23
			7,420
			\$291
			\$2,155,725
			3,374
			\$289
			\$974,350
			1,961
			\$289
			\$566,500
			1,413
			\$289
			\$407,850
			4,046
			\$292
			\$1,181,375
			2,138
			\$297
			\$635,200
			1,908
			\$286
			\$546,175

Step 5 - Build the Average sales price calculation measure

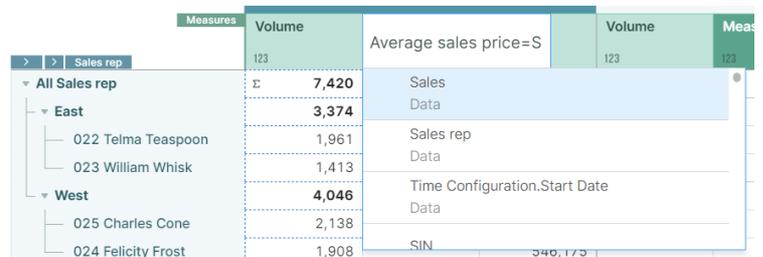
(1) Add a new measure for average sales price

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).



Year	Quarter	Month	Measures
Jan 2023			
			Volume
			Sales
			123
			es
			7,420
			2,155,725
			3,374
			974,350
			1,961
			566,500

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**.



Year	Quarter	Month	Measures
Jan 2023			
			Volume
			Average sales price=S
			Volume
			Meas
			123
			123
			7,420
			Sales
			Data
			3,374
			Sales rep
			Data
			1,961
			1,413
			4,046
			Time Configuration.Start Date
			Data
			2,138
			SIN
			1,908
			546,175

 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).

fx Average sales price=Sales/Volume

FY23 Sales - By Sales rep

Year	Quarter	Month	Measures
2023	Jan	2023	Volume
Average sales price=Sales/Volume			
Volume Data			
All Sales rep	7,420		
East	3,374		
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

(2) Summarize average price to a weighted average,

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

Measures	Volume	Average sales price	Sales
123		fx 123	123
All Sales rep	7,420	Σ 192,500	⇒ 2,155,725
East	3,374	87,500	974,350

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

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

FY23 Sales - By Sales rep

Format Summarize Style Resize

Dimensions Summary Method

- Customer name: Sum
- ID: Sum
- Month: Min/Max
- Product name: Averages
- Product size: Other
- Sales rep: Sum

You can right-click the measure and use 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.

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

FY23 Sales - By Sales rep

Format Summarize Style Resize

Dimensions Summary Method

- Customer name: Formula
- ID: Formula
- Month: Formula
- Product name: Formula
- Product size: Formula
- Sales rep: Formula

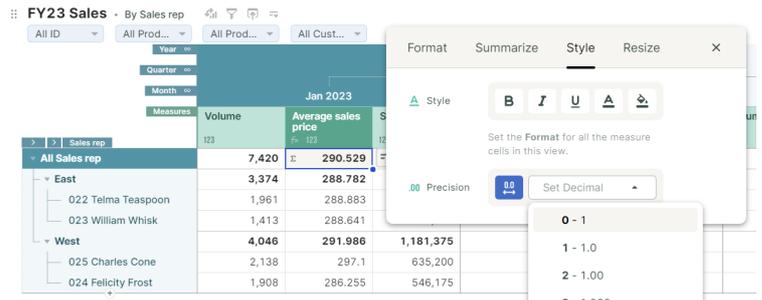
Year	Quarter	Month	Measures
2023	Jan	2023	Volume
Average sales price			
All Sales rep	7,420	Σ 290,528	⇒ 2,155,725
East	3,374	288,782	974,350
022 Telma Teaspoon	1,961	288,883	566,500
023 William Whisk	1,413	288,641	407,850
West	4,046	291,986	1,181,375
025 Charles Cone	2,138	297.1	635,200
024 Felicity Frost	1,908	286.255	546,175

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 zero decimal places.

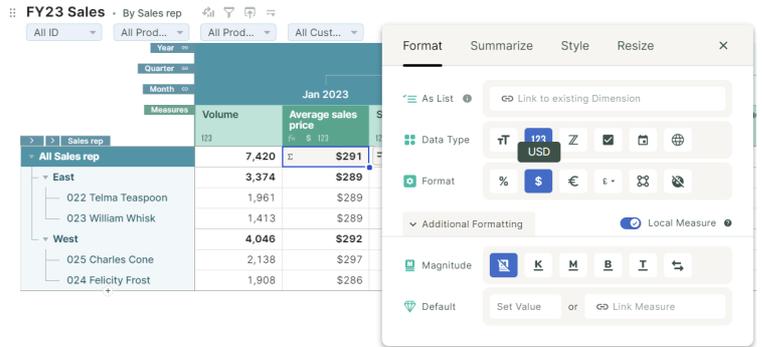
You can right-click the measure and style from the context menu.



(3) Format average price to \$

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

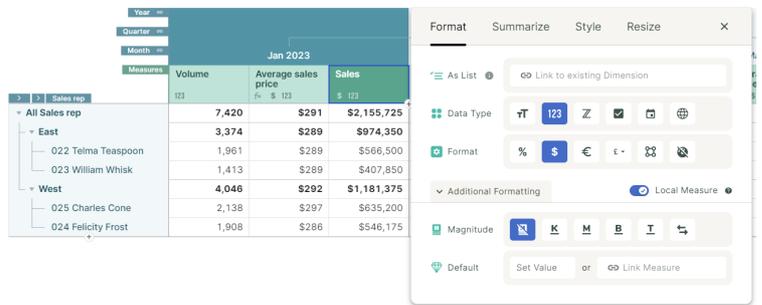
You can right-click the measure and format from the context menu.



(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.

FY23 Sales By Sales rep

Year	Volume	Average sales price	Sales
Jan 2023	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 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.

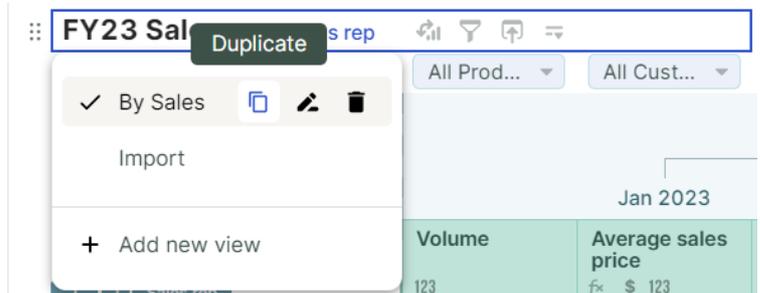
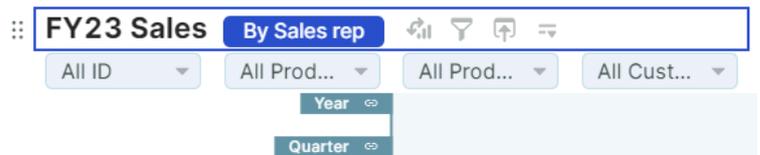
FY23 Sales - By product

Product name	STD Standard			LRG Large			XXL Extra Large			All Product size		
	Volume	Average sales price	Sales	Volume	Average sales price	Sales	Volume	Average sales price	Sales	Volume	Average sales price	Sales
100 Vanilla	608	\$100	\$60,800	379	\$300	\$113,700	201	\$600	\$120,600	1,188	\$248	\$295,100
101 Chocolate	637	\$100	\$63,700	381	\$300	\$114,300	193	\$600	\$115,800	1,211	\$243	\$293,800
102 Strawberry	647	\$100	\$64,700	385	\$300	\$115,500	185	\$600	\$111,000	1,217	\$239	\$291,200
103 Coffee	632	\$125	\$79,000	382	\$375	\$143,250	188	\$750	\$141,000	1,202	\$302	\$363,250
104 Raspberry ripple	634	\$125	\$79,250	376	\$375	\$141,000	191	\$750	\$143,250	1,201	\$303	\$363,500
200 Mango	374	\$150	\$56,100	215	\$450	\$96,750	105	\$900	\$94,500	694	\$356	\$247,350
201 Salted caramel	370	\$175	\$64,750	223	\$525	\$117,075	114	\$1,050	\$119,700	707	\$426	\$301,525
All Product name	3,902	\$120	\$468,300	2,341	\$359	\$841,575	1,177	\$719	\$845,850	7,420	\$291	\$2,155,725

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

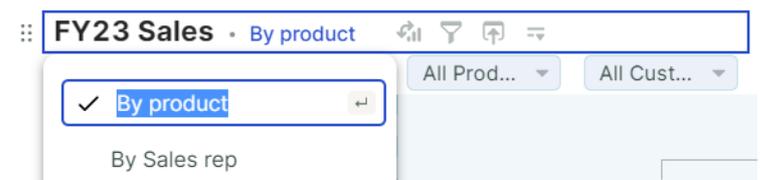
(1) Duplicate the By Sales rep view to start By product view

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



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.

FY23 Sales - By product

Product name	Volume	Average sales price	Sales
022 Telma Teaspoon	1,413	\$289	\$566,500
023 William Whisk	1,413	\$289	\$407,850
East	3,374	\$289	\$974,350

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

Product name	Product size	Average sales price	Sales
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
201 Salted caramel	707	\$426	\$301,525
All Product name	7,420	\$291	\$2,155,725

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.

Product name	Average sales price	Sales
100 Vanilla	\$100	\$60,800
101 Chocolate	\$100	\$63,700
102 Strawberry	\$100	\$64,700
103 Coffee	\$125	\$79,000
104 Raspberry	\$125	\$79,250
200 Mango	\$150	\$56,100
201 Salted caramel	\$175	\$64,750
All Product name	\$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 you 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).

Sales analysis
Analysis
Configure

Contents Presets

DIMENSIONS

- ▶ Customer name
- ▶ Product name
- ▶ Product size
- ▶ Sales rep
- ▶ Time
- ▶ Versions

MEASURES

TABLES

- ▶ Commission drivers
- ▶ Time
- ▶ Product size
- 123 Commission rate
- FY23 Sales
- Invoice month
- Customer name
- Product name
- Product size
- 123 Volume
- 123 Average sales price
- 123 Sales
- 123 Commission costs
- Sales rep
- ▶ Time Configuration

fx Commission costs = Sales * Commission drivers.Commission rate

FY23 Sales - By Sales rep

All ID | All Prod... | All Prod... | All Cust... | + Dimension

Year: Jan 2023

	Volume	Average sales price	Sales	Commission costs
All Sales rep	7,420	\$291	\$2,155,725	\$110,697
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

Commission drivers - Update

	Commission rate		
	STD Standard	LRG Large	XXL Extra Lar...
Jan 2023	2%	4%	8%
Feb 2023	2%	4%	8%
Mar 2023	2%	4%	8%
Apr 2023	2%	4%	8%
May 2023	2%	4%	8%
Jun 2023	2%	4%	8%
Jul 2023	2%	4%	8%
Aug 2023	2%	4%	8%
Sep 2023	2%	4%	8%
Oct 2023	2%	4%	8%
Nov 2023	2%	4%	8%
Dec 2023	2%	4%	8%

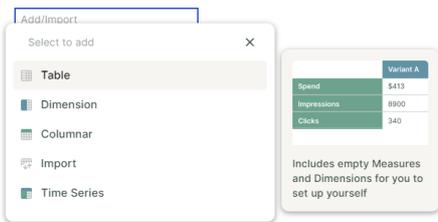
Step 7 - In the FY23 Sales table, calculate commission costs using a cost driver table

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

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

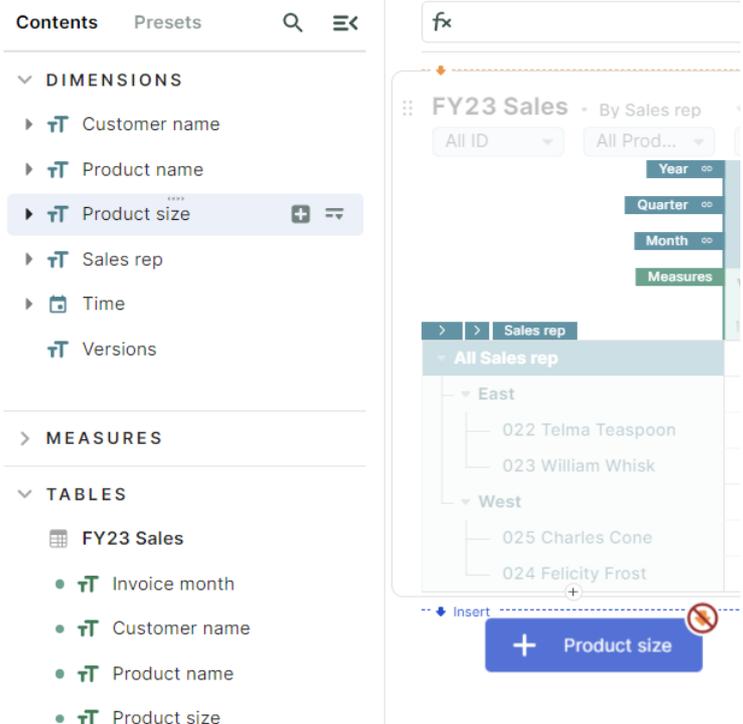
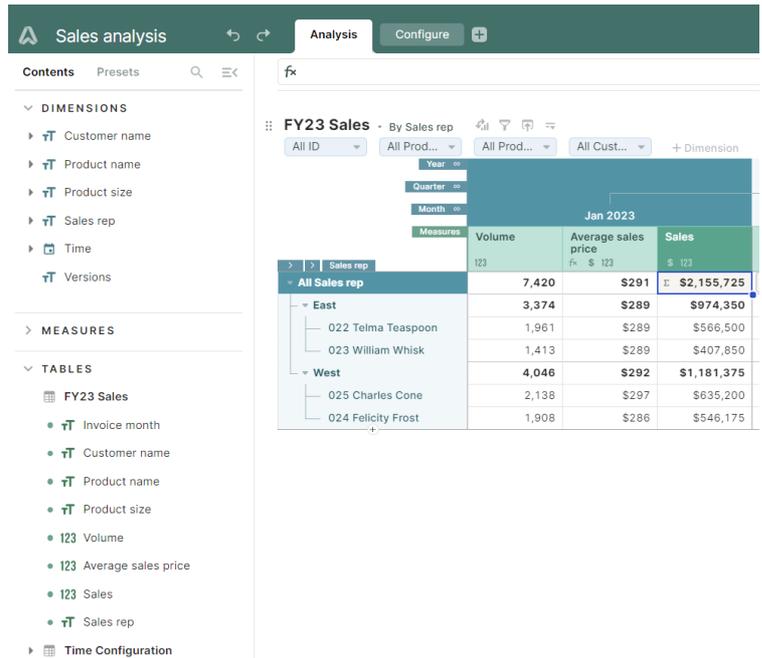
The dimensions, measures and tables built so far in our app are available for reuse, exploring and updating.

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



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.

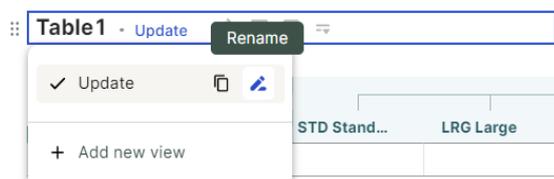


The new Table1 is added with View1.

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.

	Volume	Average sales price	Sales	Volume	Ap
Jan 2023					
- All Sales rep	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		

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.

Allocate existing values by

Duplicating values into each Month

Assigning values to 2023-01

Spreading values evenly across Month

Don't add
Add to Table

(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).

Commission drivers · Update

+ Dimension

Measures	Month	Product size	Level2			All Prod...
			STD Standard	LRG Large	XXL Extra Large	
Commission rate % 123	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%
	Jul 2023		2%	4%	8%	14%
	Aug 2023		2%	4%	8%	14%
	Sep 2023		2%	4%	8%	14%
	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%	
2023		24%	48%	96%	168%	

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

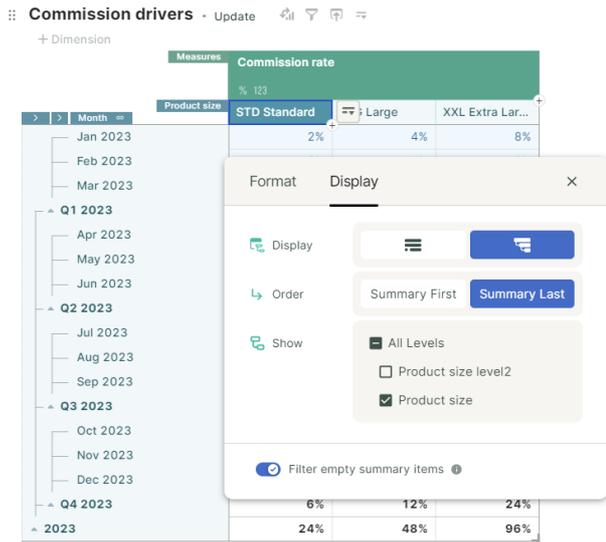
Commission drivers · Update

Measures

Measures	Month	Product size	Level2			All Prod...
			STD Standard	LRG Large	Measures	
Commission rate % 123	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%
	Jul 2023		2%	4%	8%	14%

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

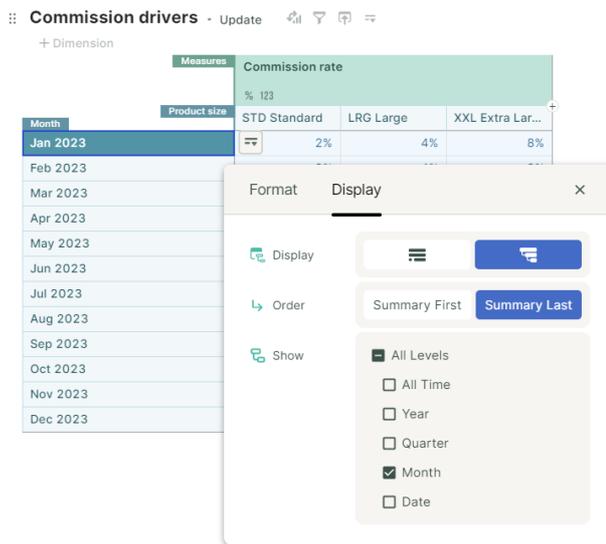
- uncheck Product size level2 (the 2nd level in the Product size hierarchy, the All Product size total).
- show Product size (the 1st level) only.



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.

fx Commission costs = Sales * Commission drivers.Commission rate

Measures	Volume	Average sales price	Sales	Commission costs
All Sales rep	7,420	\$291	\$2,155,725	\$110,697

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).

fx Commission cost=Sales*Commission drivers.Commission rate

Measures	Volume	Average sales price	Sales	drivers.Commission rate
All Sales rep	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	

Commission drivers - Update

	Commission rate		
	STD Standard	LRG Large	XXL Extra Lar...
Jan 2023	2%	4%	8%

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.

fx Commission costs = Sales * Commission drivers.Commission rate

FY23 Sales - By Sales rep

All ID | All Prod... | All Prod... | All Cust... | + Dimension

Year: Jan 2023

Measures	Volume	Average sales price	Sales	Commission costs
Sales rep	123	fx \$ 123	\$ 123	fx \$ 123
All Sales rep	7,420	\$291	\$2,155,725	\$110,697
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

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



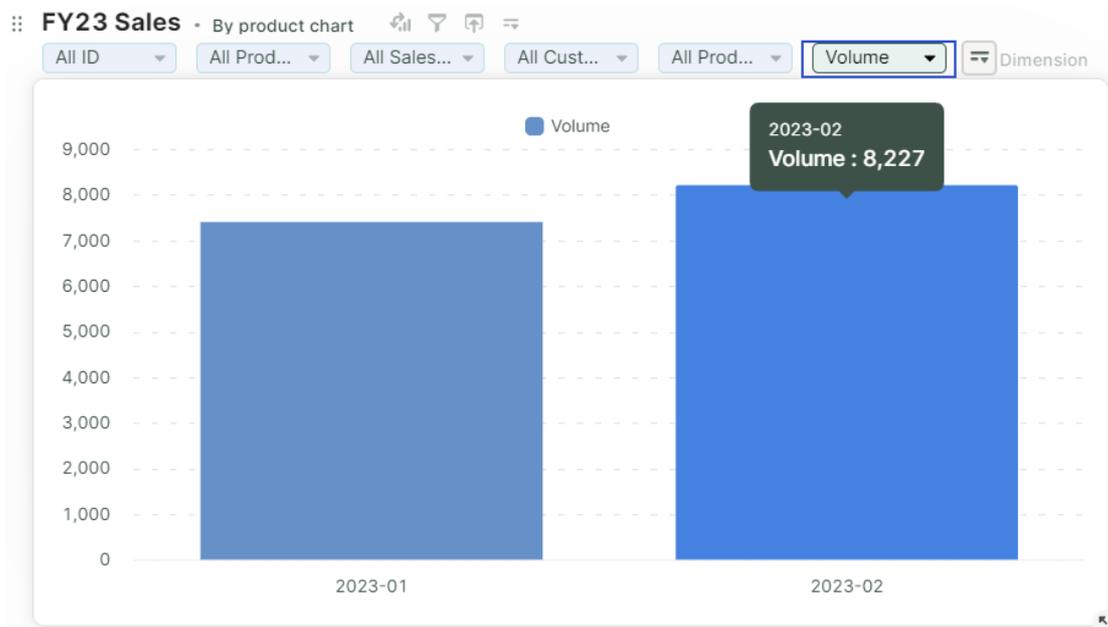
In this Part 4 you will learn:

- 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.



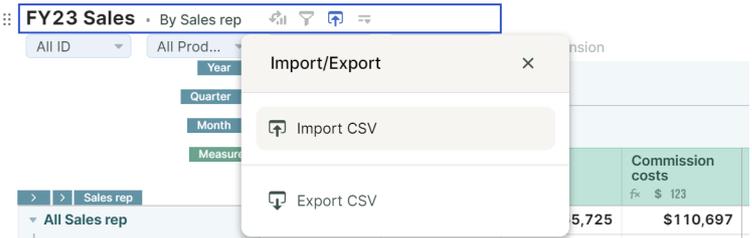
Step 9 - Chart January and February 2023 measures

(1) Import February 2023 sales into FY23 Sales table

Left-click import.

Jan 2023				
Measures	Volume	Average sales price	Sales	Commission costs
	123	\$ 123	\$ 123	\$ 123
All Sales rep	7,420	\$291	\$2,155,725	\$110,697

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.

Import into FY23 Sales
From February 2023 sales from CRM.csv

Start import at row:

Map import data

Columns to import	Select how to import
<input type="checkbox"/> Invoice number	<input type="button" value="Create new Measure"/>
<input checked="" type="checkbox"/> Invoice month	<input type="button" value="Month"/>
<input checked="" type="checkbox"/> Customer name	<input type="button" value="Customer name"/>
<input checked="" type="checkbox"/> Product name	<input type="button" value="Product name"/>
<input checked="" type="checkbox"/> Product size	<input type="button" value="Product size"/>

Update linked Dimensions

Configure import time range

Importing 462 rows of data.

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.

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.

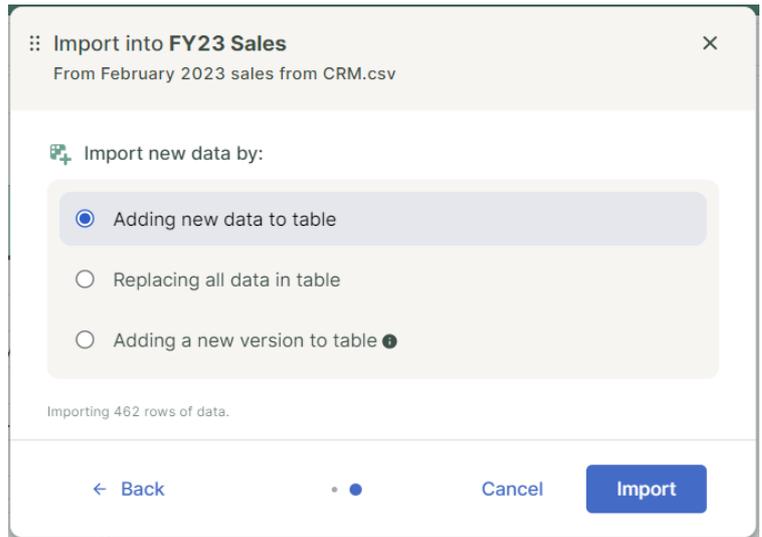
The other options are:

- 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  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)?



Sales rep	Jan 2023				Feb 2023			
	Volume	Average sales price	Sales	Commission costs	Volume	Average sales price	Sales	Commission costs
All Sales rep	7,420	\$291	\$2,155,725	\$110,697	8,227	\$296	\$2,435,700	\$125,465
East	3,374	\$289	\$974,350	\$50,035	3,804	\$295	\$1,122,725	\$57,837
022 Teima Teaspoon	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
West	4,046	\$292	\$1,181,375	\$60,663	4,423	\$297	\$1,312,975	\$67,628
025 Charles Cone	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

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

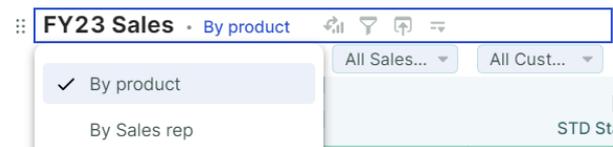
Select the By product view.

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).



Product name	Volume	Average sales price	Sales
100 Vanilla	608	\$100	\$60,800

- 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.

Product name	Volume	Average sales price	Sales	Commission costs
100 Vanilla	1,188	\$248	\$295,100	\$15,412
101 Chocolate	1,211	\$243	\$293,800	\$15,110

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

Measures	Volume	Average sales price	Sales	Commission costs	Volume	Average sales price
	123	\$ 123	\$ 123	\$ 123	123	\$ 123
	7,420	\$291	\$2,155,725	\$110,697	8,227	

Our dimensions (except time) are pages.

Month	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023
Volume	7,420	8,227			

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.

Month	Jan 2023	Feb 2023	Mar 2023
Volume	7,420	8,227	

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

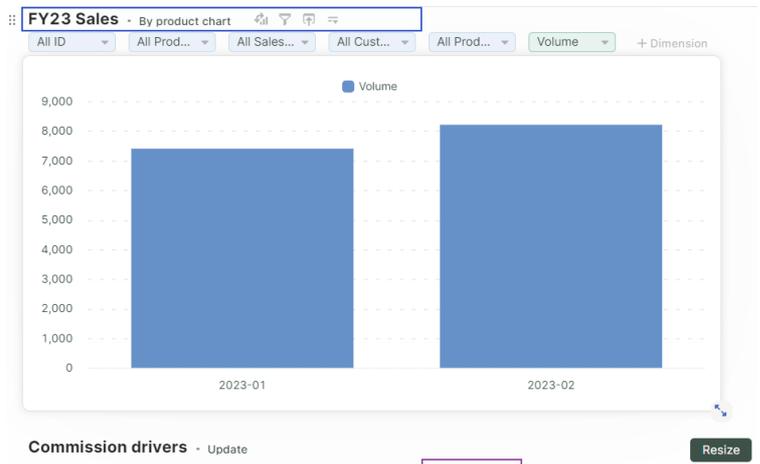
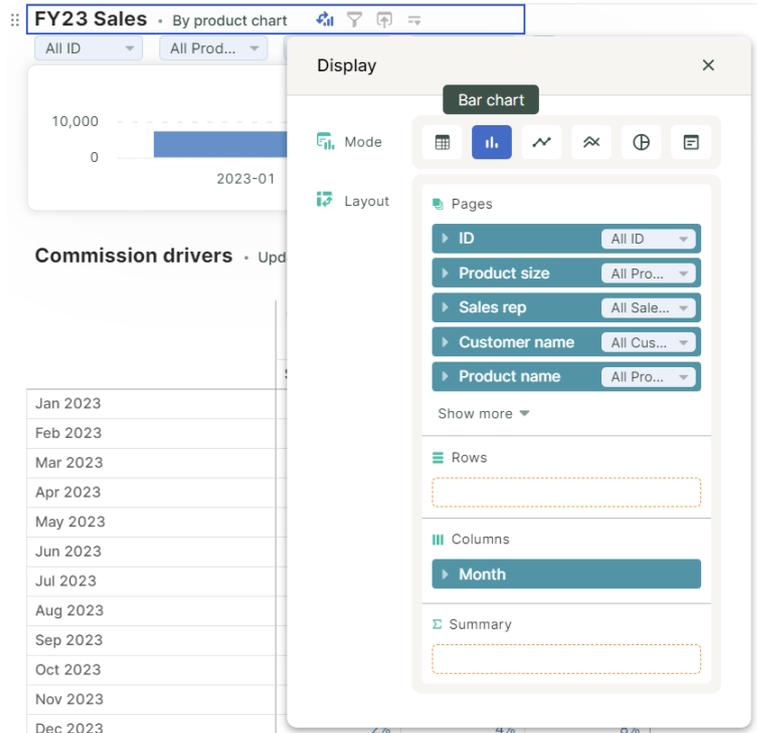
You can explore other display modes for alternate presentations with additional table views.

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

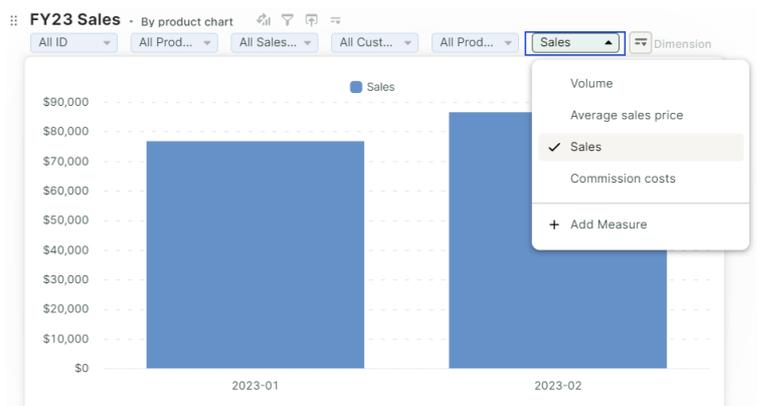
The Summary area of the layout is used to summarize dimensions in the table view.

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.



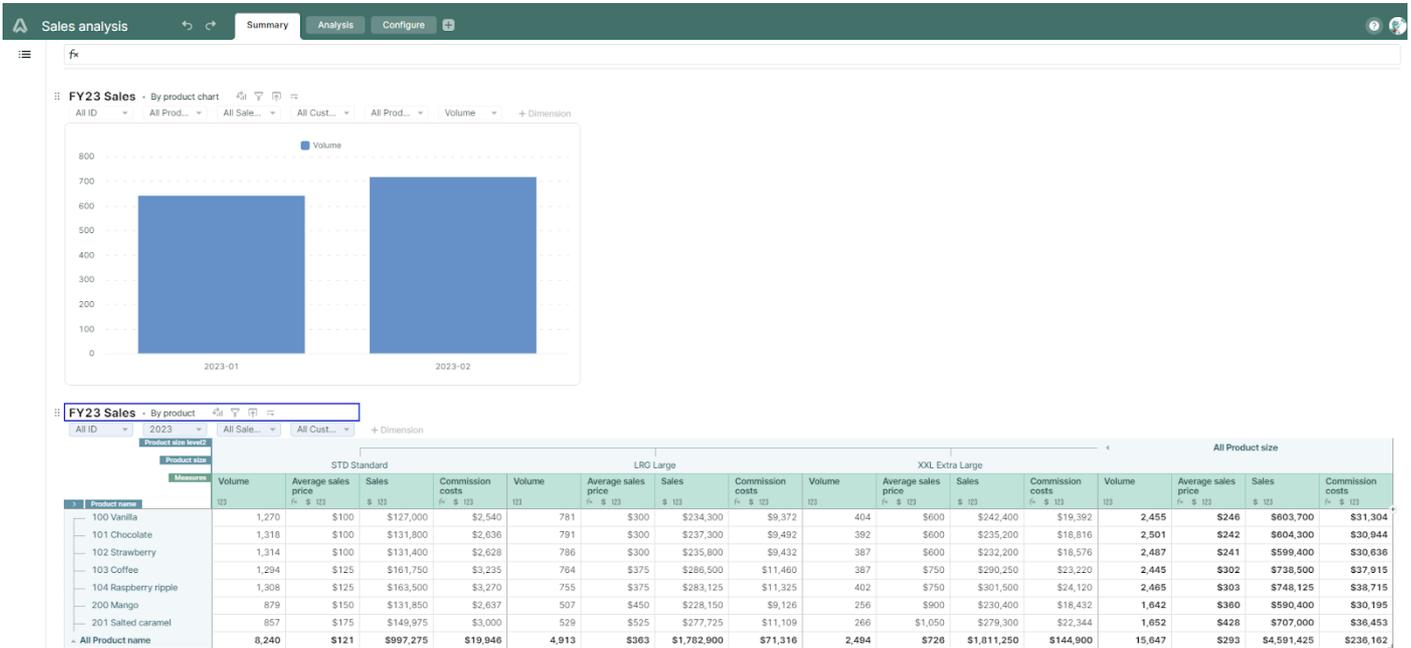
Left-click on the Measures page header and select Sales to complete the table view.



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.

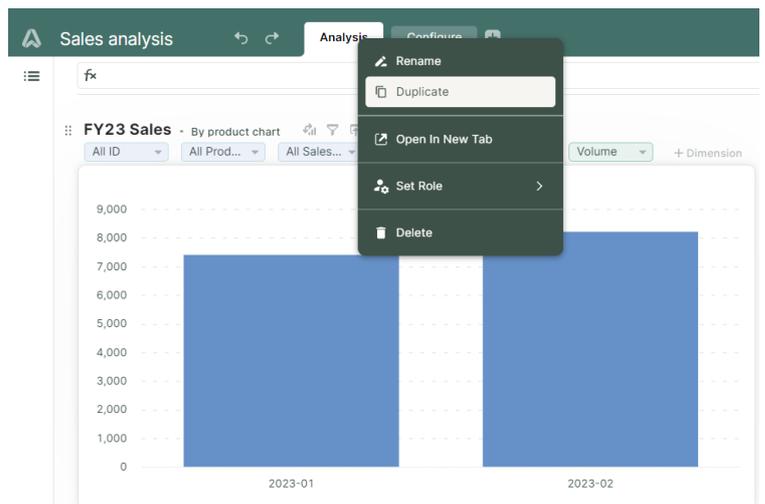


Step 10 objective - add a dashboard and reuse table views

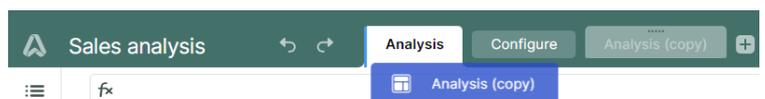
(1) Add (by duplicating) a new dashboard

Right-click and duplicate the Analysis dashboard.

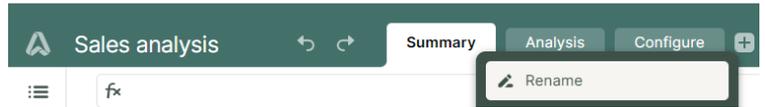
The duplicate dashboard will contain both tables.



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).



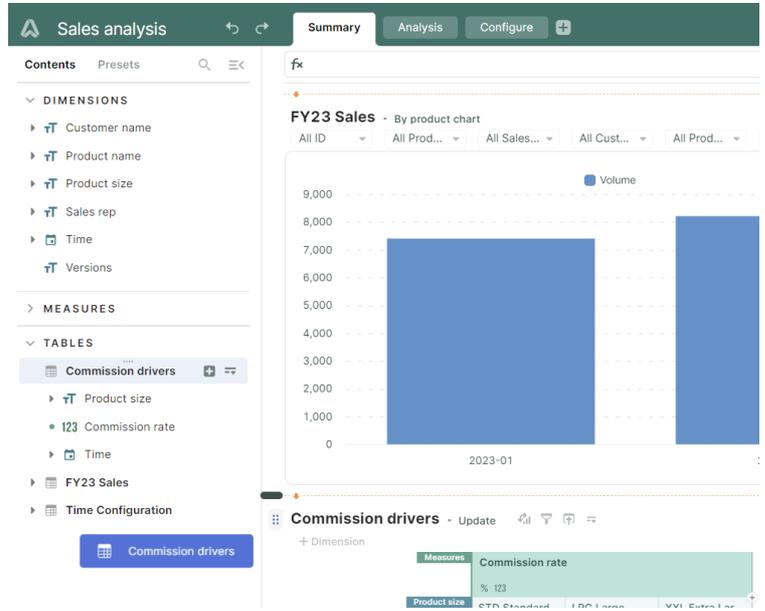
Right-click and rename the dashboard to Summary.



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

open the Contents panel.

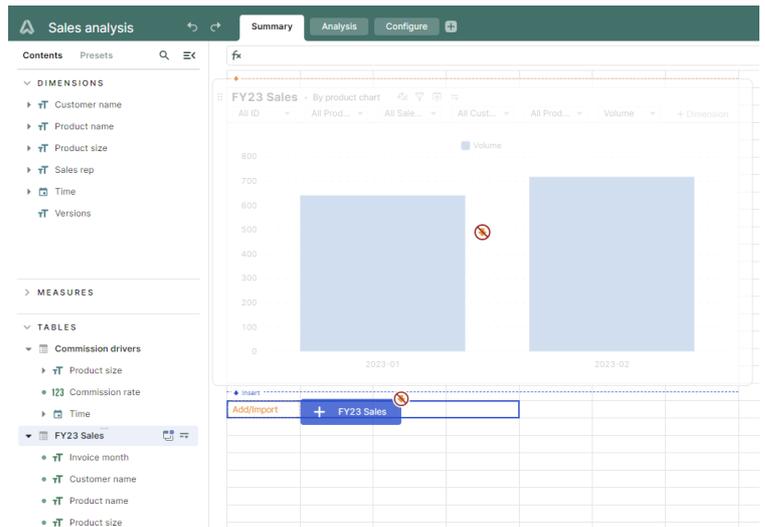
To remove the Commission drivers table you can left-click and hold and drag the table away from the grid and drop on the Contents panel.



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.

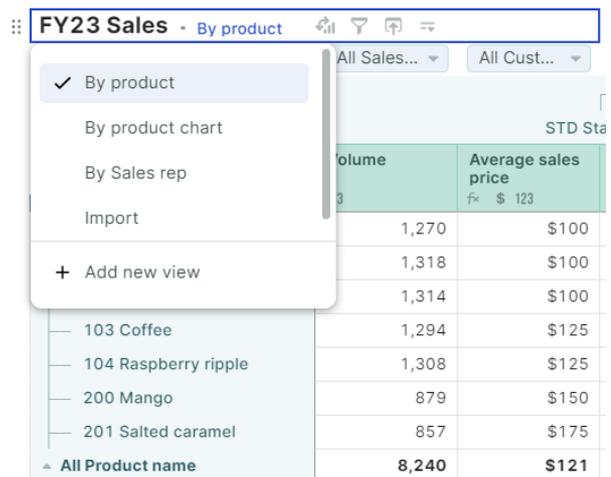


When inserted, you can select the preferred table view (or add a new view).

We will use the By product table view.

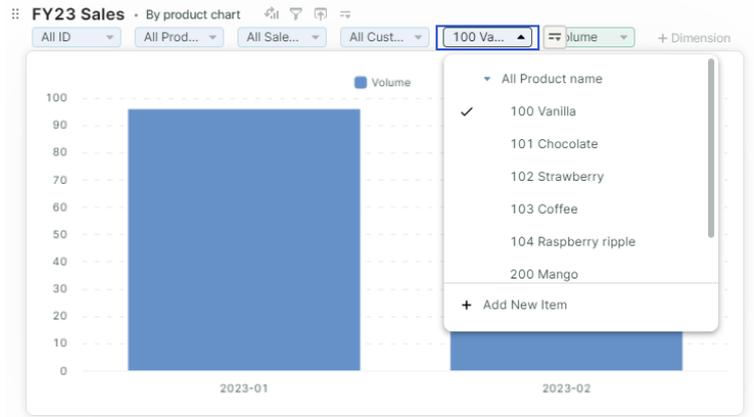
We can add additional table views, and use Display to access Mode for table, chart of card types).

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!

FY23 Sales - By Sales rep

	Jan 2023				
	Volume	Average sales price	Sales	Commission costs	Volume
All Sales rep	1,188	\$248	\$295,100	\$15,412	1,267
East	552	\$248	\$136,700	\$7,090	578
022 Telma Teaspoon	311	\$252	\$78,400	\$4,100	320
023 William Whisk	241	\$242	\$58,300	\$2,990	258
West	636	\$249	\$158,400	\$8,322	689
025 Charles Cone	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.