# 04. Standard filters

## Standard filters information

### Standard Filters to avoid double count of opportunities:

|  |  |
| --- | --- |
| **Filters:** | **Notes** |
| ROLE\_TYPE\_DISPLAY = AE |  |
| PAY\_MEASURE\_DISPLAY = ASV |  |

### To replicate RTB Daily (or get most recent view of the data) these are the key filters:

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| --- | --- |
| **Filters:** | **Notes** |
| SNAPSHOT\_WEEK\_BKT = 0 |  |

### To replicate RTB Weekly most recent views, use the following filters****:****

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| --- | --- |
| **Filters:** | **Notes** |
| SNAPSHOT\_WEEK\_BKT\_RTB = 0 | Refer to RTB DataVerse Template (link in '[How to connect to Cubes](https://wiki.corp.adobe.com/display/DD/How+to+connect+to+Cubes+in+Power+BI+Desktop)' in Power BI users) for examples on how to apply Snapshot filters to see previous weeks or BOQ snapshots.  BOQ is to be used to look at previous quarters only.  The current quarter has multiple weekly snapshots. |

### How to get Latest Pipeline (RTB Daily)

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| --- | --- |
| **Filters:** | **Notes** |
| BU = DX |  |
| Pay Measure Display = ASV |  |
| Role Type Display = AE (PS, SAM etc.) | Only one type should be selected to avoid double count |
| Snapshot Week BKT = 0 | To get most recent (Daily) refresh select this filter = 0.  If intending to show multiple weeks in data set to <> Future Weeks |
| Snapshot Qtr BKT = 0 | This will make setting the weekly filter easier if you'd like to review previous weeks |
| Close/Create/Qualification qtr | Set to the quarter you'd like to analyze |

### How to get Last Friday Pipeline (RTB Weekly)

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| **Filters:** | **Notes** |
| BU = DX |  |
| Pay Measure Display = ASV |  |
| Role Type Display = AE (PS, SAM etc.) | Only one type should be selected to avoid double count |
| Snapshot Week BKT RTB = 0 | Set to <> Not RTB to avoid duplicates if intending to show multiple weeks |
| Snapshot Qtr BKT = 0 | This will make setting the weekly filter easier if you'd like to review previous weeks |
| Close/Create/Qualification qtr | Set to the quarter you'd like to analyze |

### How to get BOQ Pipeline for a given close Quarter and snapshot quarter

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| --- | --- |
| **Filters:** | **Notes** |
| BU = DX |  |
| Pay Measure Display = ASV |  |
| Role Type Display = AE (PS, SAM etc.) | Only one type should be selected to avoid double count |
| Snapshot Qtr = Snapshot quarter | Set to the point in time you'd like to view.  This is not what closed or was created but what the data looked like at that time.  It needs to be used in conjuction with close qtr/create qtr/qualification qtr filter |
| Close/Create/Qualification qtr | Set to the quarter you'd like to analyze |

### Standard Filters to avoid double count of Oppties

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| --- | --- |
| **Filters:** | **Notes** |
| Snapshot Quarter | This is not what closed or was created but what the data looked like at that time.  It needs to be used in conjuction with close qtr/create qtr/qualification qtr filter |
| Role Type Display | Needs to be set to one role type (AE, SAM, etc.) since multiple roles are on the same opportunity |

### How to get Rep/ Managers Quota

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| --- | --- |
| **Filters:** | **Notes** |
| Daily or weekly filters + |  |
| Target Type = Quota |  |

### How to get QRF and corresponding Target Measures

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| --- | --- |
| **Filters:** | **Notes** |
| Daily or weekly filters + |  |
| Target Type = QRF |  |

### How to get Plan and corresponding Target Measures

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| --- | --- |
| **Filters:** | **Notes** |
| Daily or weekly filters + |  |
| Target Type = Plan |  |

### How to get Retention KPIs and filters to be applied

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| --- | --- |
| **Filters:** | **Notes** |
| Close Qtr= CQ |  |
| Renewal Quarter= CQ |  |

# 05. Measures and Logic

## Measures and Logic

| **Measure Name** | **Folder in DataVerse** | **Comments** |
| --- | --- | --- |
| ASV $ | \_Pipeline Measures | ASV to be used if needing to see Early Stage Opportunities or other Opps that fall outside traditional Pipeline |
| OPP # | \_Pipeline Measures | Count of opportunities.  Based on SFDC OPP\_ID field |
| OPPTY $ | \_Pipeline Measures | To be used in conjuction with Pay Measure fields to see specific portions of Opportunities |
| PIPE $ | \_Pipeline Measures | Pipeline Calculation.  IN\_PIPELINE filter = 1 (based on GEO ADJ COMMIT = W + F + UC) |
| SS5+ $ | \_Pipeline Measures | SS5+ Calculation.  SalesStageGrp\_Sort = 2 (Filter based on Opp\_Stage = 5, 6, 7, or Won) |
| IN QTR GC QUOTA | \_Quota Measures | Gross Creation Quota.  Current Quarter number only |
| BOOKINGS TARGET | \_Target Measures | It is the sum of plan/QRF or Quota based on the target type filter |
| IN QTR CG TARGET | \_Target Measures | Gross Creation Target full qtr number.  Current qtr only |
| IN QTR GC TARGET SS5 | \_Target Measures | Gross Creation Target for SS5 full qtr number.  Current qtr only |
| PIPE TARGET | \_Target Measures | It is the sum of plan/QRF or Quota based on the target type filter multiplied based on the ratio. |
| PIPE TARGET SS5 | \_Target Measures | It is the sum of plan/QRF or Quota based on the target type filter for SS5+ stage pipe \* target ratio. (Based on the pan number file- past 5 qtr close ratio analysis) |
| Close Ratio | \_Pipeline Measures | Its the sum of the Won pipeline which is present in Week 1 divided by total week 1 pipeline |
| Projected Close Ratio | \_Pipeline Measures | Its the sum of the WFCU Oppty divided by total week 1 pipeline |
| Close Rate | \_Pipeline Measures | BOQ S3+ Flag = If(AND(RELATED('Snapshot Quarter'[SNAPSHOT\_WEEK\_NUMBER]) = "W1", Pipeline[SALES\_STAGE\_ID] in {1,2,3,4,5,6}) = TRUE(), 1,0) |
| SS3+ Coverage | \_Target Measures | It is pipe $ divided by Pipe Target $ |
| SS5+ Coverage | \_Target Measures | It is pipe $ divided by Pipe Target $ for SS5+ pipeline |