



1. Hours Column in Agreement Data Table

Objective:

Create a calculated column in the Agreement Data table to return the total hours from the Time Entry Labor table.

Conditions:

- **Matching Internal IDs:** The Internal ID in the Agreement Data table must match the Internal ID in the Time Entry Labor table.
- **Date Criteria:** Sum only the Hours from the Time Entry Labor table if the corresponding date is after the "Support Start Date New" in the Agreement Data table.

Excel Reference:

Column N (Renewal Data) in the Excel sheet.

Expected Output:

A new column in the Agreement Data table displaying the total hours from the Time Entry Labor table for matching rows.



2. Project Service Expense Column

Objective:

Calculate the total cost of labor for each matching service item in the Agreement Data table.

Key Points:

- **Leverage the Hours Column:** Use the new Hours column created in the Agreement Data table.
- **Matching Service Items:** Match the Service Item column in the Time Entry Labor table with the Service Item column in the Rate Sheet.

Excel Reference:

Column O (Renewal Data) in the Excel sheet.



3. Matching Project Agreement Count

Objective:

Create a calculated column in the Agreement Data table to count the total number of rows where the Internal ID is populated, allowing duplicates.

Count Criteria:

- Count every occurrence of Internal IDs in the Agreement Data table.
- Duplicates are included (each Internal ID occurrence is counted).

Excel Reference:

Column P (Renewal Data) in the Excel sheet.

4. Agreement Expense Measure

Objective:

Add a new column called "Agreement Expense" in the Agreement Data table.

Inputs:

- Project Service Expense Total
- Matching Project Agreement Count

Logic:

Divide Project Service Expense Total by Matching Project Agreement Count. Return blank if no data exists.

Reference:

Validate against Column Q in the Renewal Data sheet.

Output:

Store the result in the Agreement Data table as a calculated column.

5. Creating the Contract Duration Column in the Pricing Table

Objective:

Add a calculated column in the Pricing Table called "Duration" to capture the number of days in each contract.

Logic:

- If Support Start Date New or Support End Date New is blank, return no value.

- Otherwise, calculate the number of days by subtracting Support Start Date New from Support End Date New.

Reference:

Use the columns Support Start Date New and Support End Date New for the calculation.

Output:

Store the result in the Pricing Table under the "Duration" column.

6. Add Measure Called "Renewal Screening" in the Pricing Table

Logic:

- If the Name column contains any of the following text (case-insensitive):
 - "renewal"
 - "AV support"
 - "service"
 - "agreement"
 - "contract"

Return "Already Renewed!".

Otherwise, return blank or no value.

Reference:

Validate against Column U in the Pricing Room sheet.

Output:

Display the result in the Pricing Table as a measure.

7. Creating the New Contract Duration Column in the Pricing Table

Objective:

Add a new calculated column called "New Contract Duration."

Logic:

- Duration \geq 180 days \rightarrow "2 years"
- Duration $<$ 400 days \rightarrow "1 year"
- Duration between 400-1000 days \rightarrow "1 year"

Output:

Store the result in the Pricing Table under the "New Contract Duration" column.

8. Creating the New Agreement Base Price Measure in the Pricing Table

Objective:

Add a new measure called "New Agreement Base Price."

Logic:

- If the agreement type is Standard Support Agreement, return the Pricing Table Amount.
- If the agreement type is Extended Support Agreement:
 - If the duration is 1 year → Multiply Project Total by 0.5.
 - If the duration is 2 years → Multiply Project Total by 1.0.

Output:

Store the result in the Pricing Table under the "New Agreement Base Price" measure.

9. Creating the Agreement Count and Projects Measure

Objective:

Add a new measure called "Agreement Count and Projects."

Logic:

Count the number of Extended Support Agreements for each Internal ID.

Output:

Store the result as the "Agreement Count and Projects" measure.

10. Creating the Lost Adjustment Measure

Objective:

Add a new measure called "Lost Adjustment" in the Pricing Table.

Logic:

- Reference the Agreement Expense measure from the Agreement Data table.
- Sum the Agreement Expense for the matching Internal ID.

Output:

Store the result in the Pricing Table as the "Lost Adjustment" measure.

11. Creating the Gross Margin Measure

Objective:

Add a new measure called "Gross Margin."

Logic:

Divide the Amount by the Lost Adjustment measure to calculate the gross margin ratio.
Multiply by 1 to convert to percentage format.

Output:

Store the result in the Pricing Table as the "Gross Margin" measure.

12. Creating the Variance Measure

Objective:

Add a new measure called "Variance."

Logic:

Compare profitability to 50%.

If profitability < 50%, calculate the variance as the difference from 50%.

Output:

Store the result in the Pricing Table as the "Variance" measure.

13. Creating the Variance Cushion (\$) Measure

Objective:

Add a new measure called "Variance Cushion (\$)."

Logic:

- If there's a variance (profitability < 50%), multiply the variance percentage by the original amount to show the dollar amount of the variance cushion.

Output:

Store the result in the Pricing Table as the "Variance Cushion (\$)" measure.

14. Creating the New Base Price Measure

Objective:

Add a new measure called "New Base Price."

Logic:

The New Base Price will be the sum of the Base Price and the Variance Cushion (\$).

If a Variance Cushion (\$) exists, it will be added to the Base Price; otherwise, the Base Price remains unchanged.

Output:

Store the result in the Pricing Table as the "New Base Price" measure.