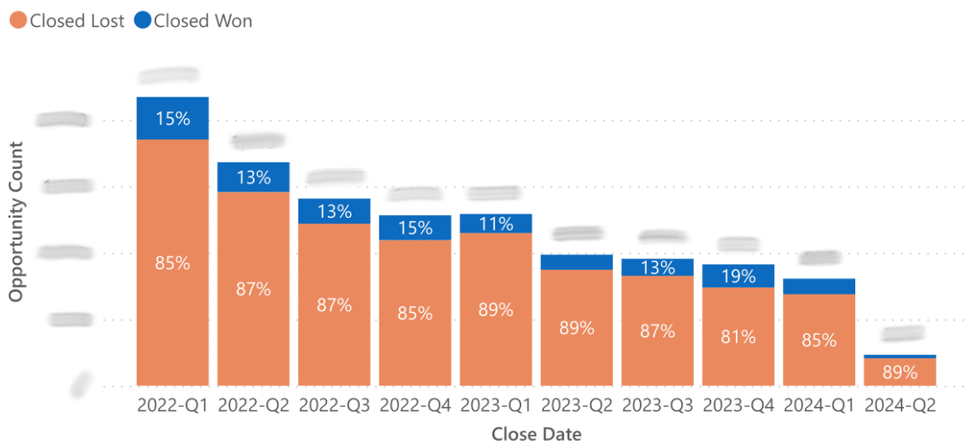
Won & Loss Overview | Product Type | Use Case | Marketing Segment | Account Focus | SDR / AE Created | Inbound / Outbound | Closed Lost Reasons | Stage Lost | Segment Comparison

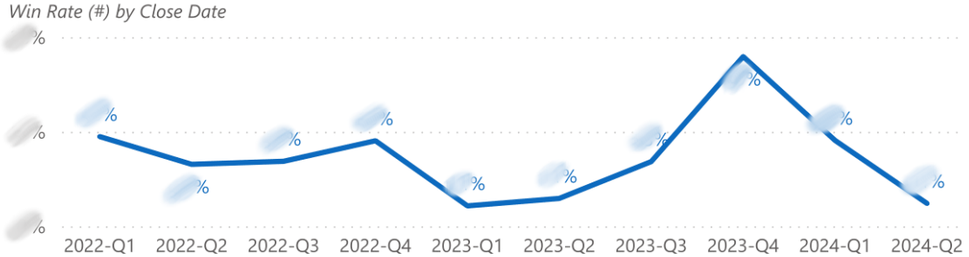
ALL DEALS (#) BY CLOSED LOST AND WON

Closed Won/Lost (#) as % of Deals Over Time



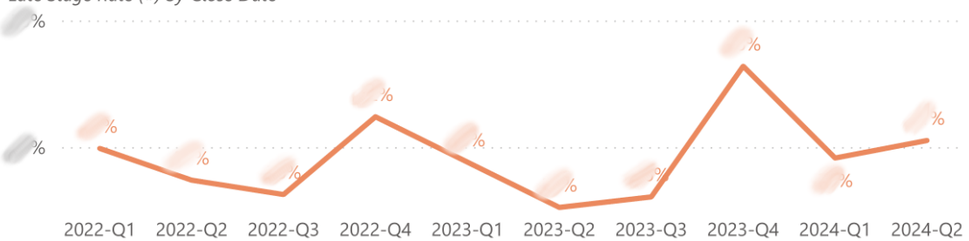
Closed Won (#) as % of Deals Over Time

Win Rate (#) by Close Date



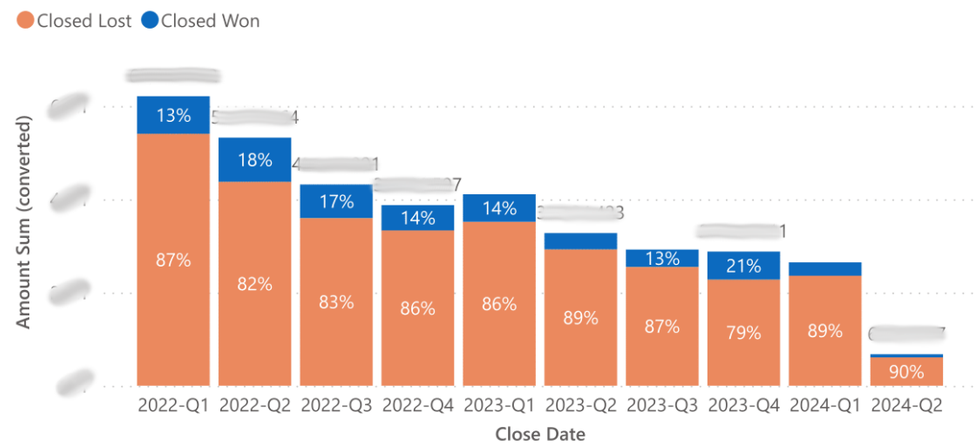
Late Stage (#) as % of Closed Lost Deals Over Time

Late Stage Rate (#) by Close Date



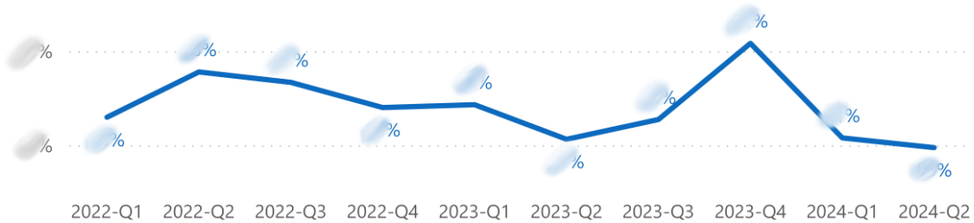
ALL DEALS ($) BY CLOSED LOST AND WON

Closed Won/Lost ($) as % of Deals Over Time



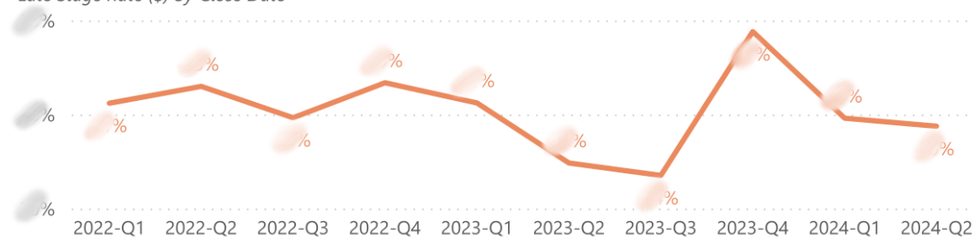
Closed Won ($) as % of Deals Over Time

Win Rate ($) by Close Date



Late Stage ($) as % of Closed Lost Deals Over Time

Late Stage Rate ($) by Close Date



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Lost
All

Early / Late Stage
All

Opportunity Type
All

Product Type
All

Primary Use Case
All

Marketing Segment
All

Account Focus
All

SDR / AE Created
All

Inbound / Outbound
All

Competitor
All

Company Segment
All

Reset Filters

CLOSED WON / LOST DEALS - PRODUCT TYPE

Attach Rate % Over Time

e.g. in Q1 2022, 16.72% of all deals (#, unfiltered) included Ehub as a product type

Product ...	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q1	202
Ace	%	%	%	%	%	%	%	%	%	7
EHub	%	%	%	%	%	%	%	%	%	6
Forums	%	%	%	%	%	%	%	%	%	6
Go Live	%	%	%	%	%	%	%	%	%	3
Platform	%	%	%	%	%	%	%	%	%	
Target	%	%	%	%	%	%	%	%	%	0

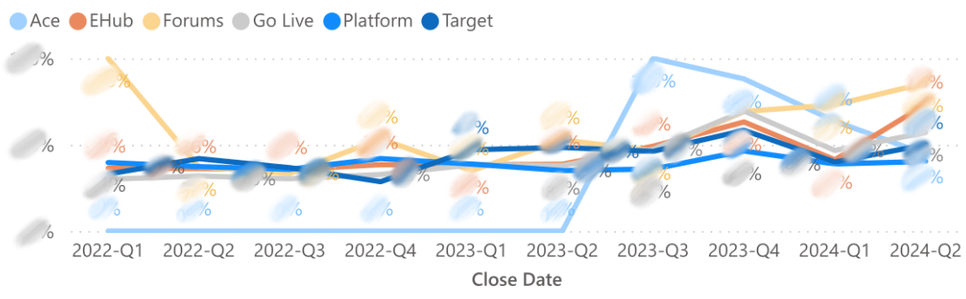
Closed Lost Reasons (#) as % of Product Type Over Time

This table is already filtered to Closed Lost; unaffected by "Closed Won/Loss" filter

Product Type	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-Q
⊟ Ace	%	%	%	%	%	%	%	%	
Blank, No ...	%	%	%	%	%	%	%	%	
Lost Sales ...	%	%	%	%	%	%	%	%	
No Budge...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
⊟ EHub	%	1%	7%	%	%	%	%	%	
Blank, No ...	%	%	%	%	%	%	%	%	
Lost Sales ...	%	3%	%	3%	%	%	%	7%	
No Budge...	%	%	%	%	%	%	%	%	

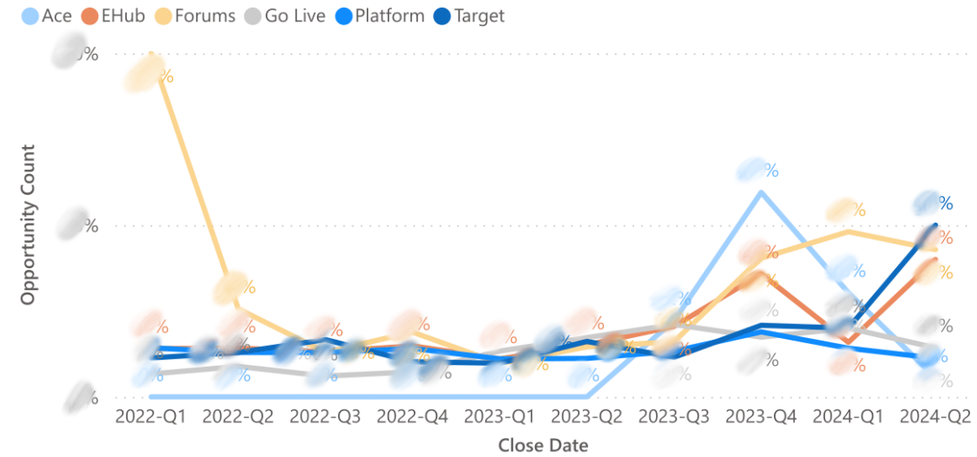
Late Stage (#) as % of Product Type Over Time

Late Stage Rate (#) per Product Type



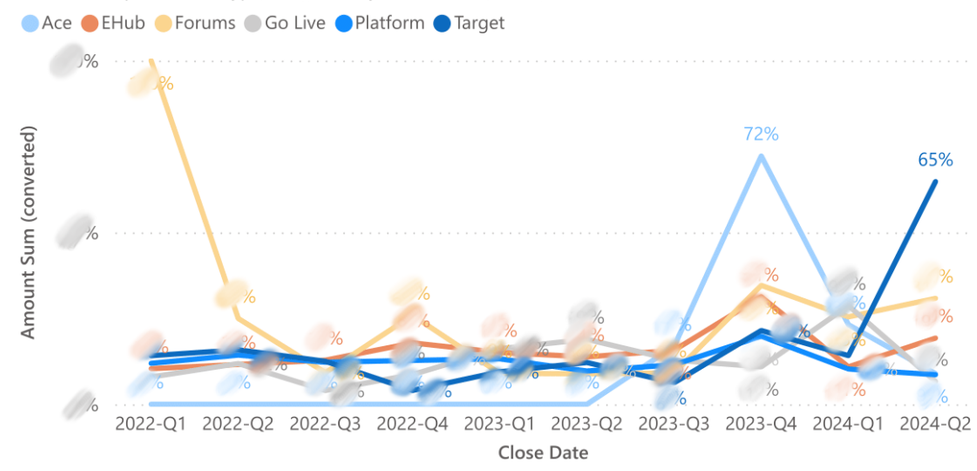
Closed Won Deals (#) as % of Product Type Over Time

Win Rate (#) per Product Type; unaffected by "Closed Won/Loss" filter



Closed Won Deals ($) as % of Product Type Over Time

Win Rate ($) per Product Type; unaffected by "Closed Won/Loss" filter



FILTERS

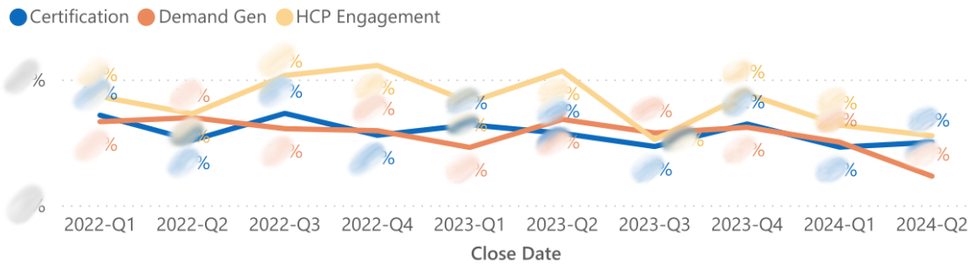
Close Date: All
BFT (Bucket): All
Closed Won / Lost: All
Early / Late Stage: All
Opportunity Type: All
Product Type: All
Primary Use Case: All
Marketing Segment: All
Account Focus: All
SDR / AE Created: All
Inbound / Outbound: All
Competitor: All
Company Segment: All

Reset Filters

ALL DEALS BY PRIMARY USE CASE

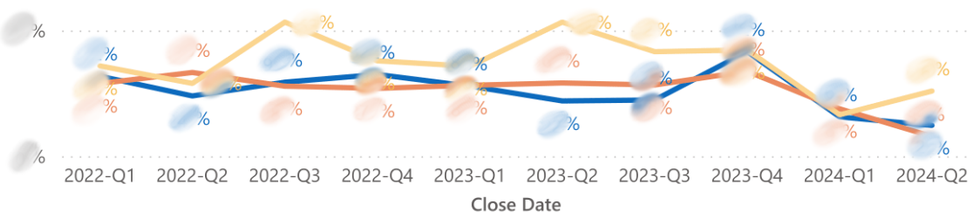
Closed Won Deals (#) as % of Primary Use Case Over Time

Win Rate (#) per Use Case



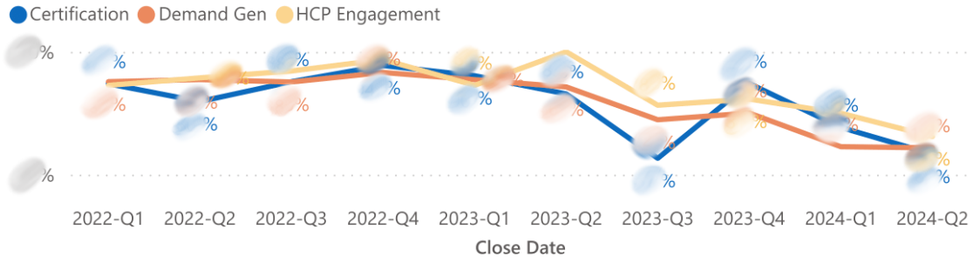
Closed Won Deals ($) as % of Primary Use Case Over Time

Win Rate ($) per Use Case

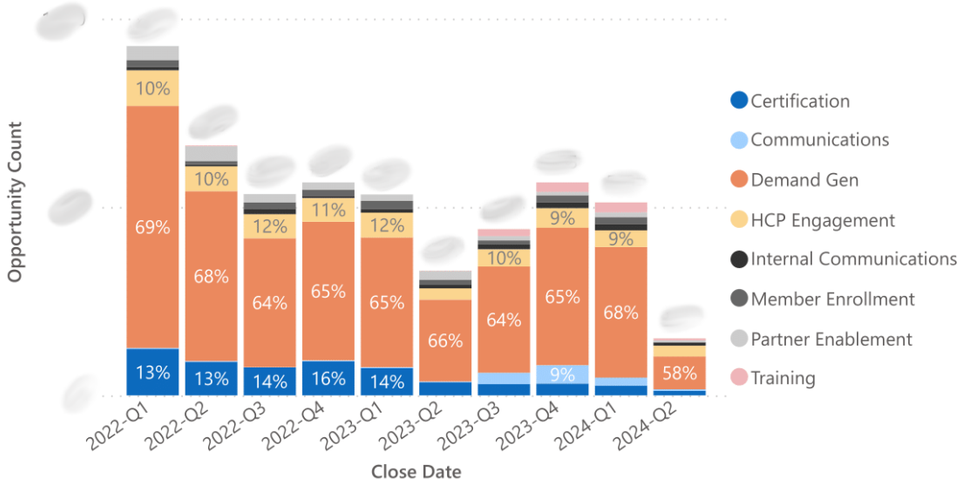


Late Stage (#) as % of Primary Use Case Over Time

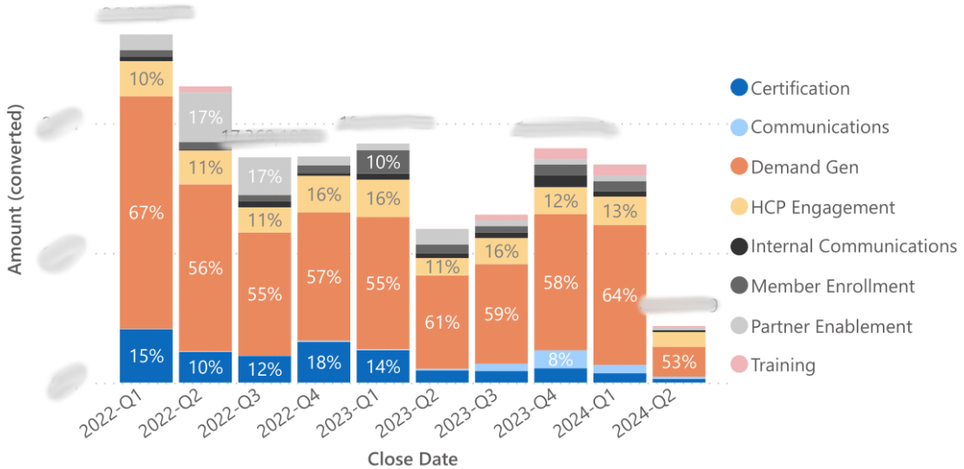
Late Stage Rate (#) per Use Case



Primary Use Case (#) as % of Deals Over Time



Primary Use Case ($) as % of Deals Over Time



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Lost
All

Early / Late Stage
All

Opportunity Type
All

Product Type
All

Primary Use Case - Left
Multiple selections

Primary Use Case - Right
Multiple selections

Marketing Segment
All

Account Focus
All

SDR / AE Created
All

Inbound / Outbound
All

Competitor
All

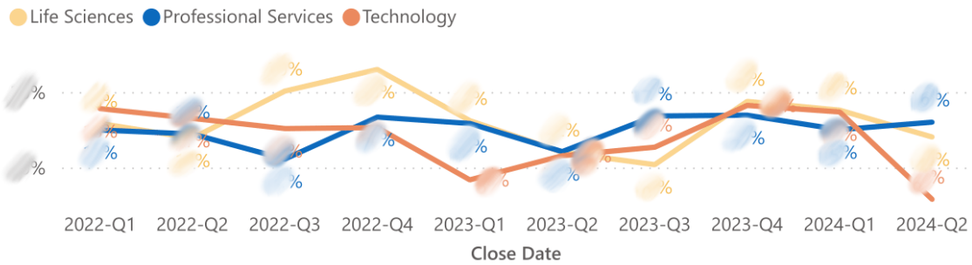
Company Segment
All

Reset Filters

ALL DEALS BY MARKETING SEGMENT

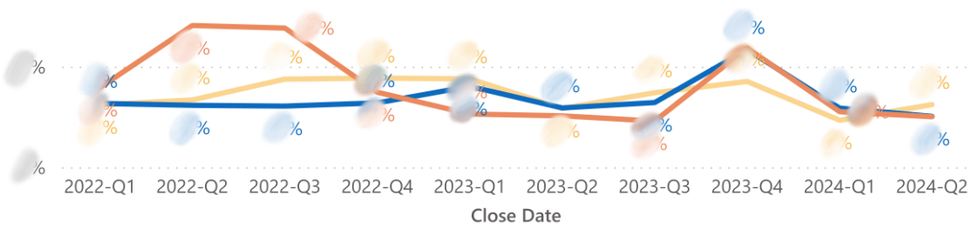
Closed Won Deals (#) as % of Marketing Segment Over Time

Win Rate (#) per Marketing Segment



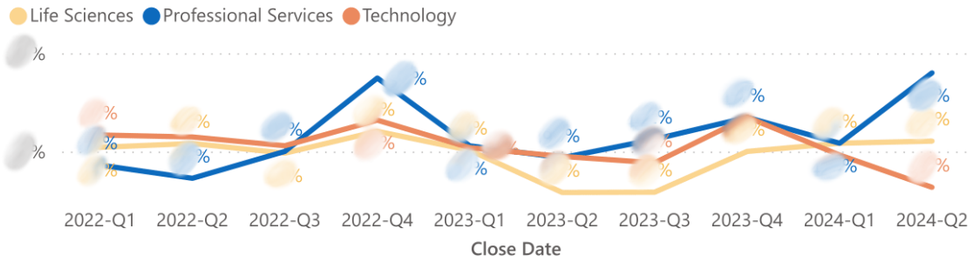
Closed Won Deals ($) as % of Marketing Segment Over Time

Win Rate ($) per Marketing Segment

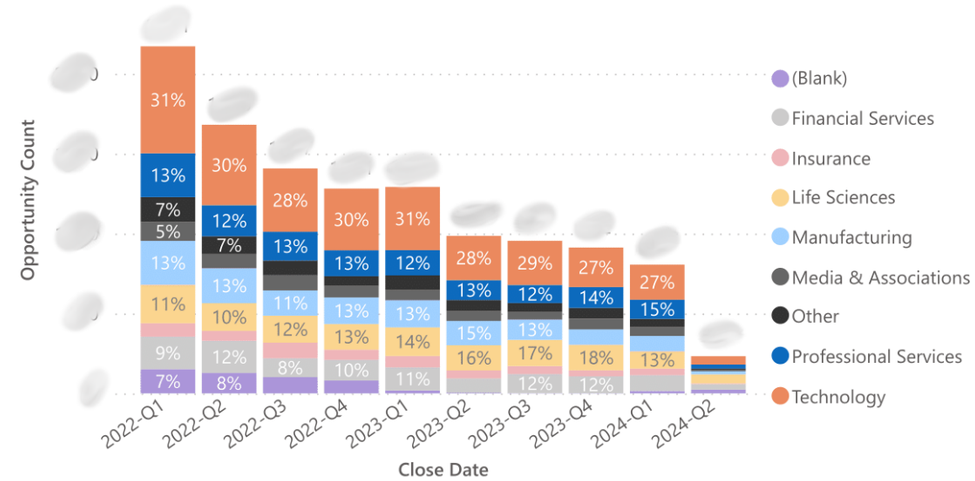


Late Stage (#) as % of Marketing Segment Over Time

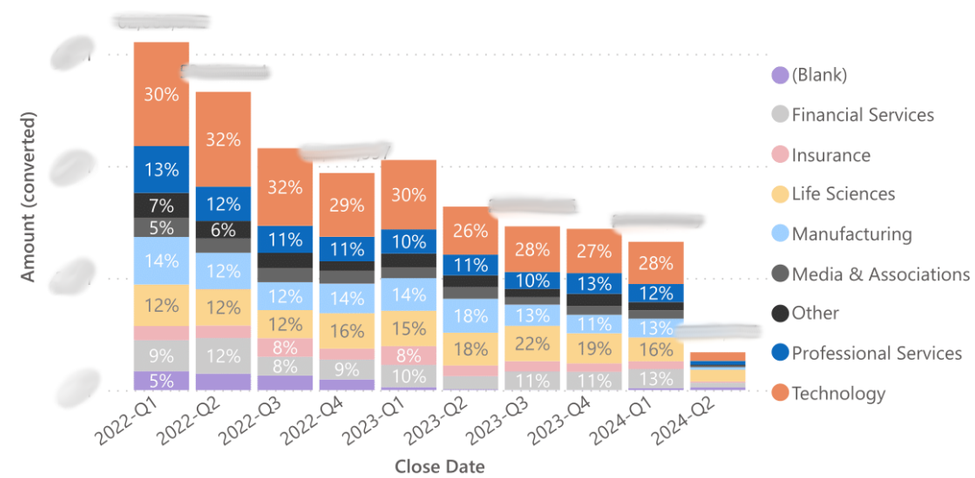
Late Stage Rate (#) per Marketing Segment



Marketing Segment (#) as % of Deals Over Time



Marketing Segment ($) as % of Deals Over Time



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Lost
All

Early / Late Stage
All

Opportunity Type
All

Product Type
All

Primary Use Case
All

Marketing Segment - Left
Multiple selections

Marketing Segment - Right
All

Account Focus
All

SDR / AE Created
All

Inbound / Outbound
All

Competitor
All

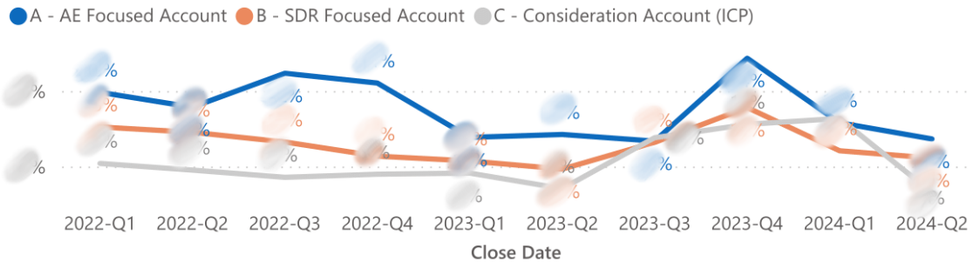
Company Segment
All

Reset Filters

ALL DEALS BY ACCOUNT FOCUS

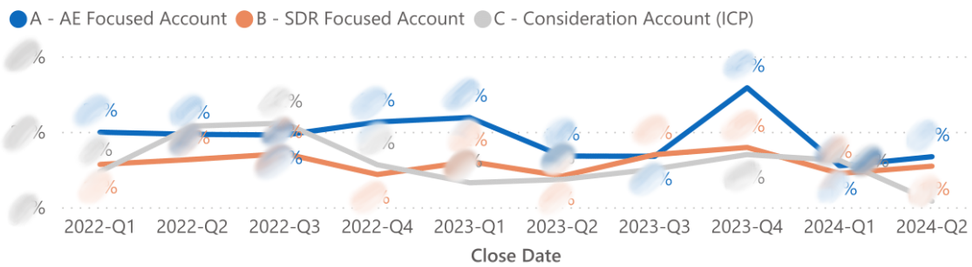
Closed Won Deals (#) as % of Account Focus Over Time

Win Rate (#) per Account Focus



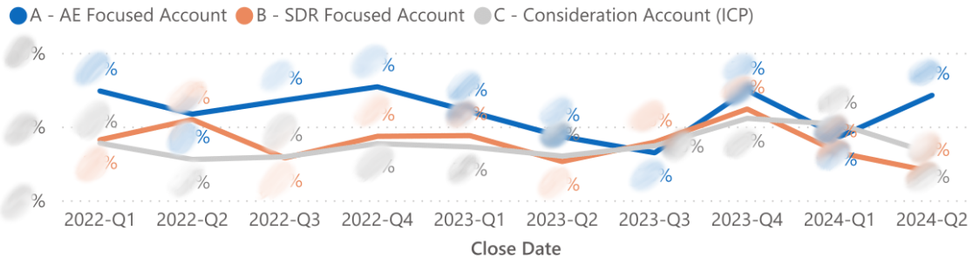
Closed Won Deals ($) as % of Account Focus Over Time

Win Rate ($) per Account Focus

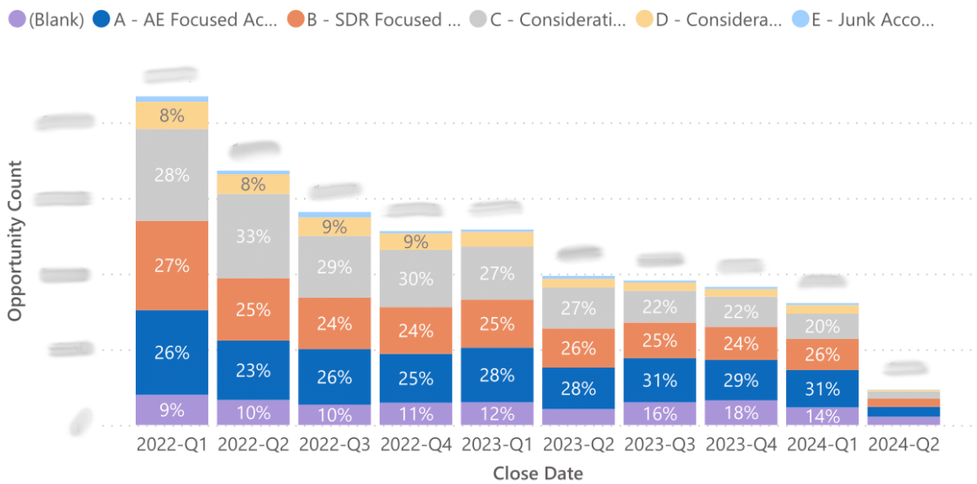


Late Stage (#) as % of Account Focus Over Time

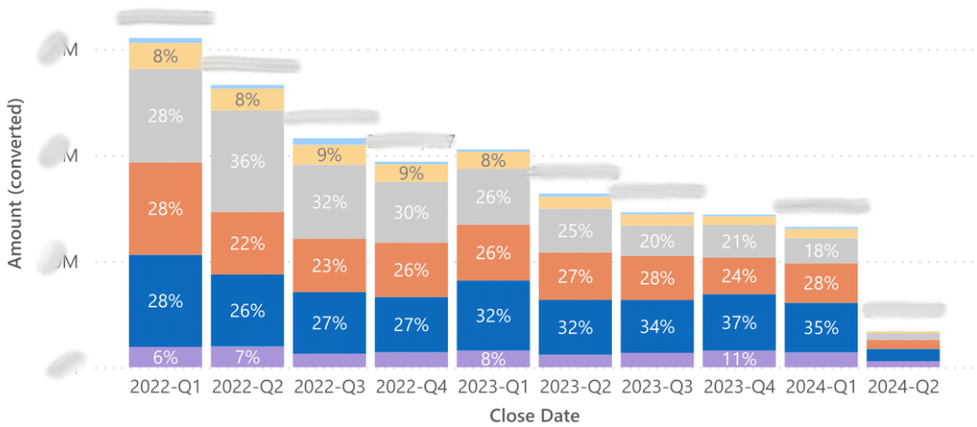
Late Stage Rate (#) per Account Focus



Account Focus (#) as % of Deals Over Time



Account Focus ($) as % of Deals Over Time



FILTERS

Close Date: All

BFT (Bucket): All

Closed Won / Lost: All

Early / Late Stage: All

Opportunity Type: All

Product Type: All

Primary Use Case: All

Marketing Segment: All

Account Focus - Left: Multiple selections

Account Focus - Right: All

SDR / AE Created: All

Inbound / Outbound: All

Competitor: All

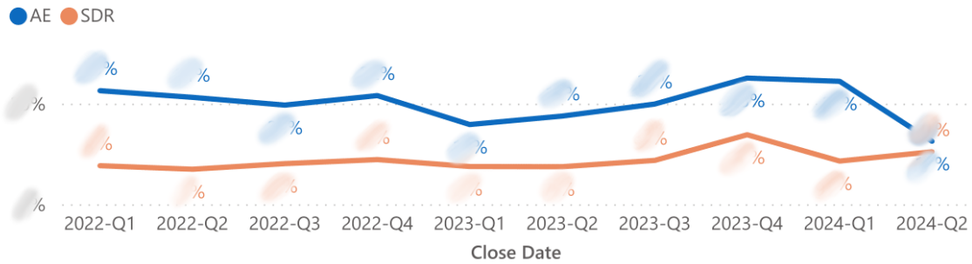
Company Segment: All

Reset Filters

ALL DEALS BY SDR / AE CREATED

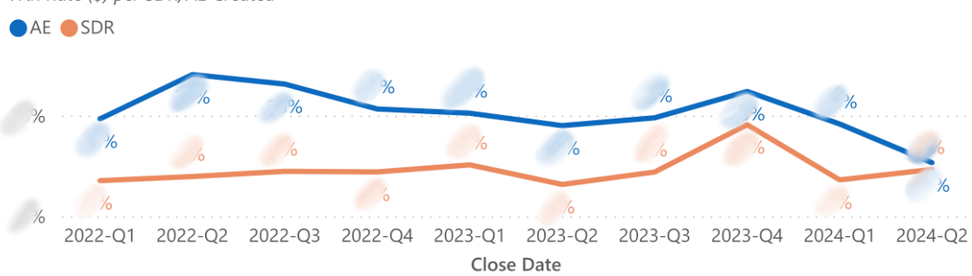
Closed Won Deals (#) as % of SDR / AE Created Over Time

Win Rate (#) per SDR/AE Created



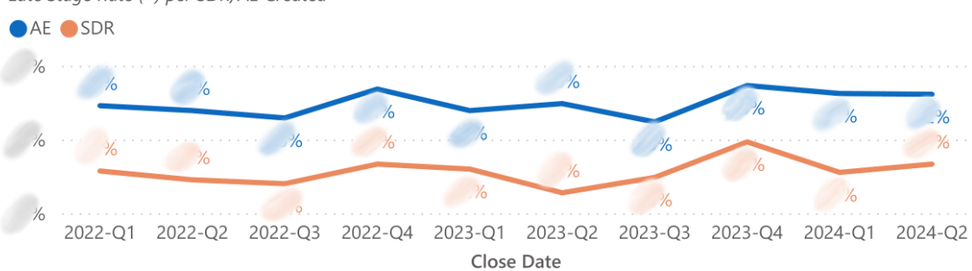
Closed Won Deals ($) as % of SDR / AE Created Over Time

Win Rate ($) per SDR/AE Created

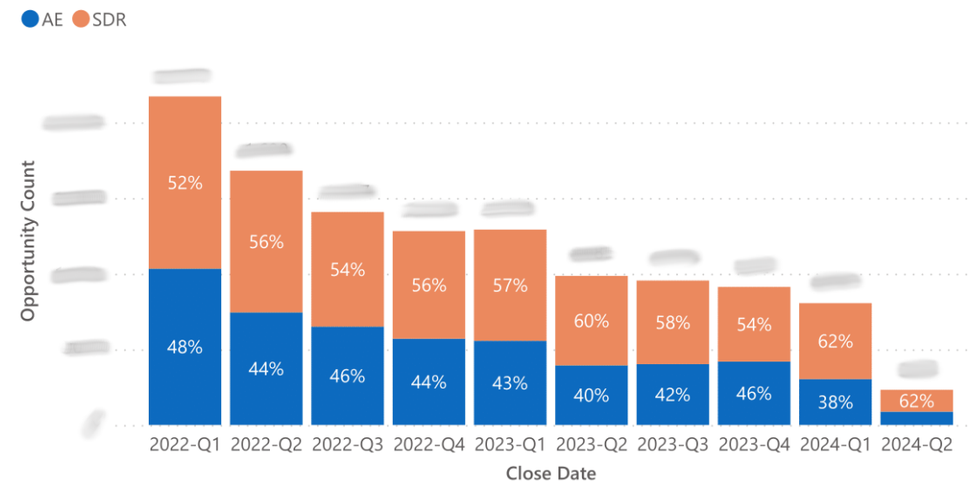


Late Stage (#) as % of SDR / AE Created Over Time

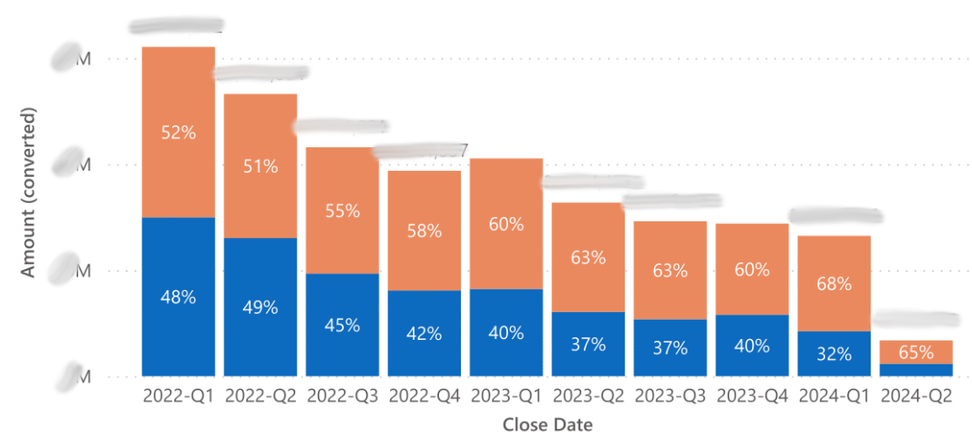
Late Stage Rate (#) per SDR/AE Created



SDR / AE Created (#) as % of Deals Over Time



SDR / AE Created ($) as % of Deals Over Time



FILTERS

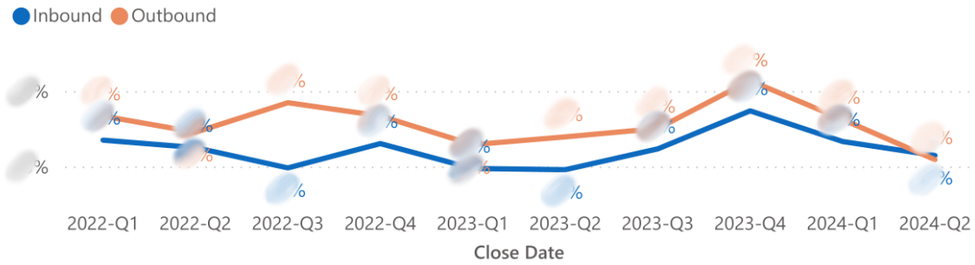
Close Date: All
BFT (Bucket): All
Closed Won / Lost: All
Early / Late Stage: All
Opportunity Type: All
Product Type: All
Primary Use Case: All
Marketing Segment: All
Account Focus: All
SDR / AE Created: All
Inbound / Outbound: All
Competitor: All
Company Segment: All

Reset Filters

ALL DEALS BY INBOUND / OUTBOUND LEAD SOURCE

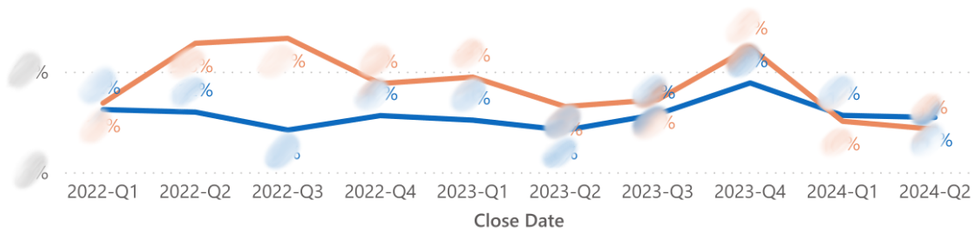
Closed Won Deals (#) as % of Inbound / Outbound Over Time

Win Rate (#) per Inbound/Outbound



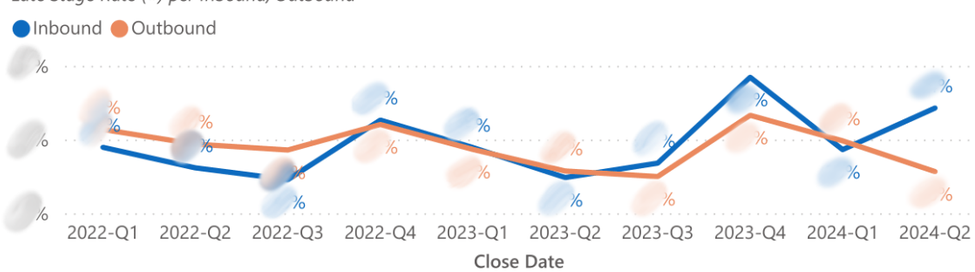
Closed Won Deals ($) as % of Inbound / Outbound Over Time

Win Rate ($) per Inbound/Outbound

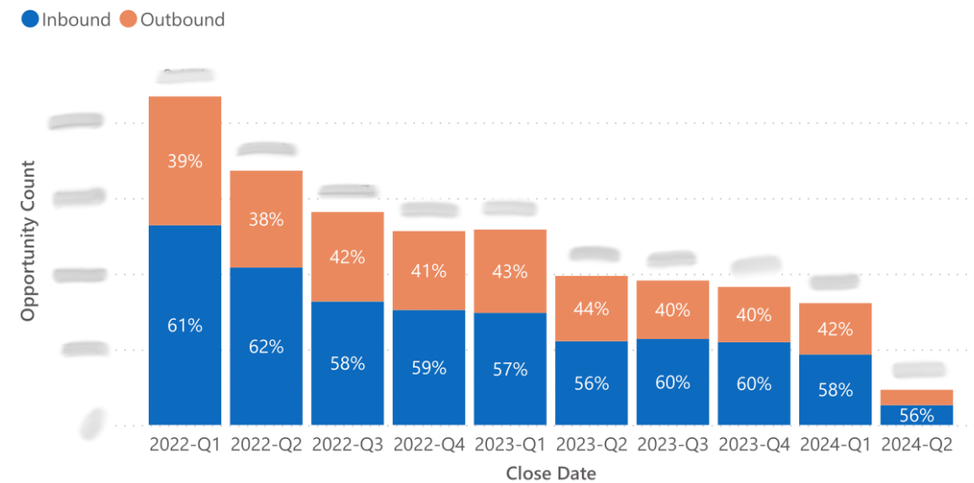


Late Stage (#) as % of Inbound / Outbound Over Time

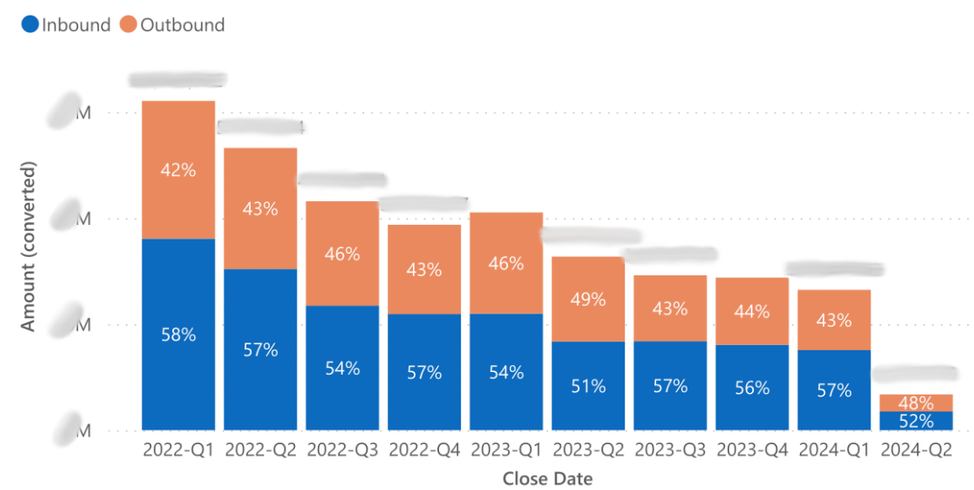
Late Stage Rate (#) per Inbound/Outbound



Inbound / Outbound (#) as % of Deals Over Time



Inbound / Outbound ($) as % of Deals Over Time



FILTERS

Close Date: All
BFT (Bucket): All
Closed Won / Lost: All
Early / Late Stage: All
Opportunity Type: All
Product Type: All
Primary Use Case: All
Marketing Segment: All
Account Focus: All
SDR / AE Created: All
Inbound / Outbound: All
Competitor: All
Company Segment: All

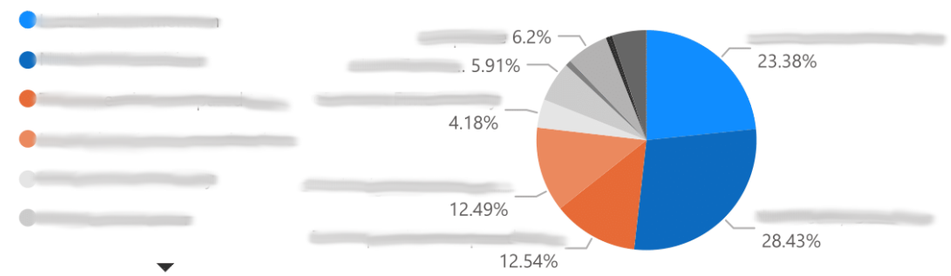
Reset Filters

CLOSED LOST DEALS BY CLOSED LOST REASONS

Total Amount Sum & Count of Closed Lost Reasons

Reason	Amount Sum	Count	Sum % of Total	Count % of Total
Lost sales momentum			%	%
No Need / Decision			%	%
Too expensive compared to competitor			%	%
No budget (no competitor involved)			%	%
Product Functionality			%	%
Late To Evaluation			%	%
Blocked by Security/Risk/Legal			%	%
Duplicate			%	%
Total			%	%

All Closed Lost Reasons



Closed Lost Reasons (#) as % of Closed Lost Deals Over Time

Reason	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-
Lost sales mome...	%	%	%	%	%	%	%	%	
No Need / Decis...	%	%	%	%	%	%	%	%	
Too expensive c...	%	%	%	%	%	%	%	%	
No budget (no c...	%	%	%	%	%	%	%	%	
Product Functio...	%	%	%	%	%	%	%	%	
Late To Evaluation	%	%	%	%	%	%	%	%	
Blocked by Secu...	%	%	%	%	%	%	%	%	
Duplicate	%	%	%	%	%	%	%	%	
Moving to Physi...	%	%	%	%	%	%	%	%	

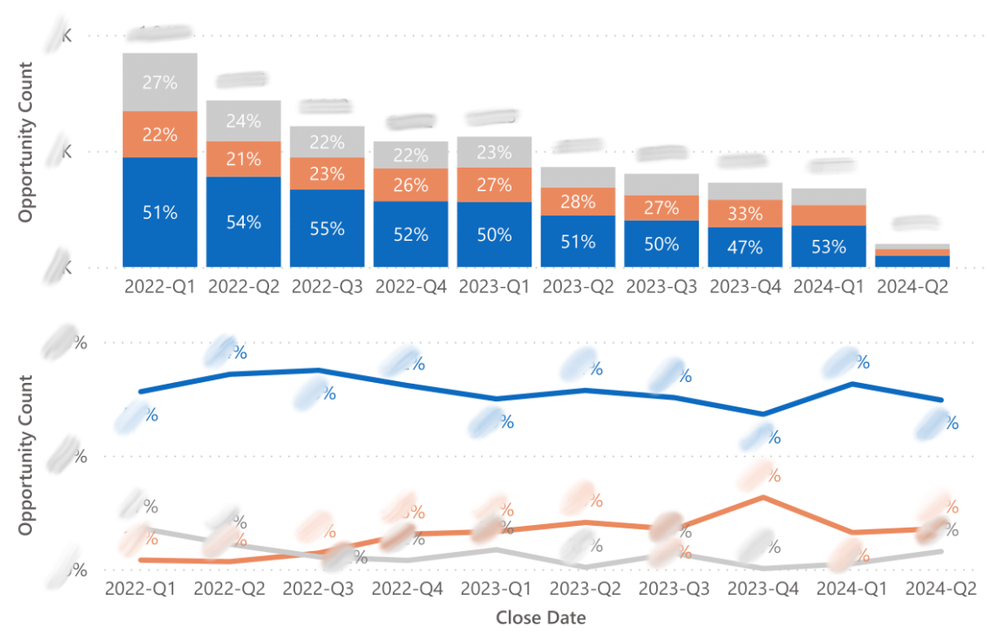
Closed Lost Reasons per Deal Range (#) as % of Closed Lost Deals Over Time

Deal Range	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024-
⊟ <30K	%	%	%	%	%	%	%	%	
Lost Sales M...	%	%	%	%	%	%	%	%	
No Budget, ...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
⊟ 30K-50K	%	%	%	%	%	%	%	%	
Lost Sales M...	%	%	%	%	%	%	%	%	
No Budget, ...	%	%	%	%	%	%	%	%	
Other	%	%	%	%	%	%	%	%	
50K-100K	%	%	%	%	%	%	%	%	

Core Closed Lost Reasons (#) as % of Closed Lost Deals Over Time

Drill down to view Closed Lost Reasons as % of Deal Range

Lost Sales Momentum, No Need | No Budget, Too Expensive | Other



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Lost
Closed Lost

Early / Late Stage
All

Opportunity Type
All

Product Type
All

Primary Use Case
All

Marketing Segment
All

Account Focus
All

SDR / AE Created
All

Inbound / Outbound
All

Closed Lost Reason
Multiple selections

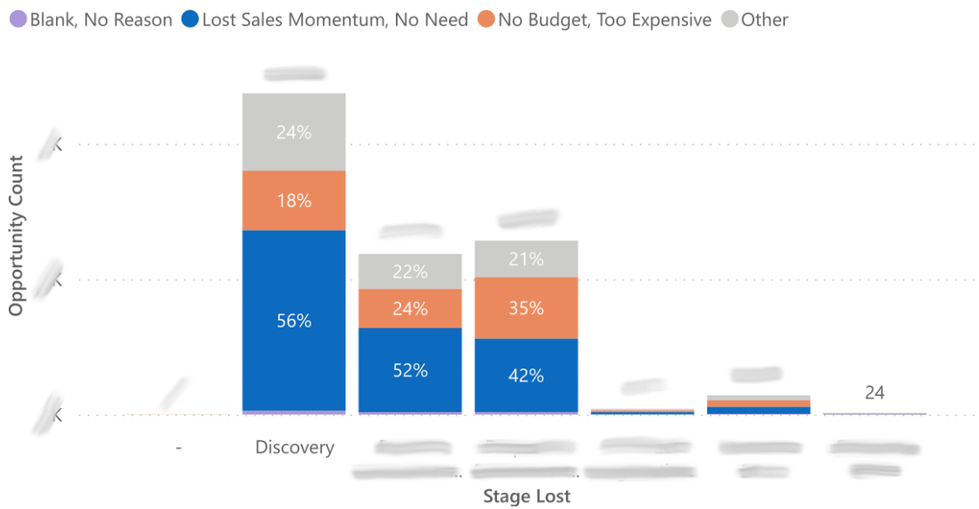
Competitor
All

Company Segment
All

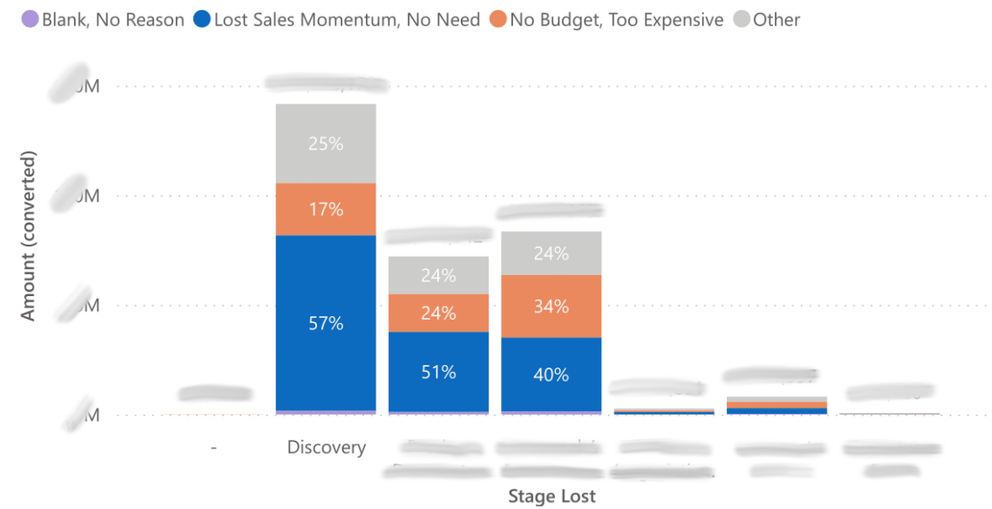
Reset Filters

CLOSED LOST DEALS BY STAGE LOST

Closed Lost Reason (#) as % of Stage Lost



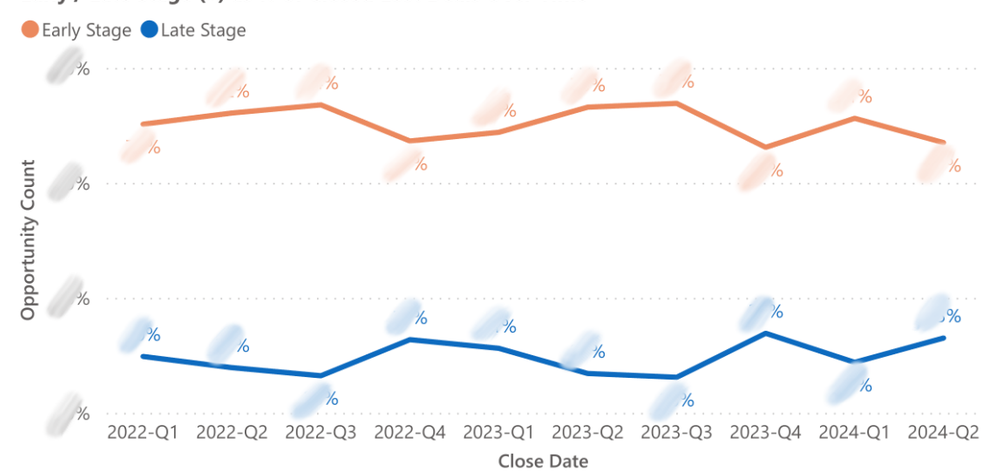
Closed Lost Reason ($) as % of Stage Lost



Close Lost Reasons per Stage Lost (#) as % of Closed Lost Deals Over Time

Stage Lost	2022-Q1	2022-Q2	2022-Q3	2022-Q4	2023-Q1	2023-Q2	2023-Q3	2023-Q4	2024
⊟ Discovery	%	%	%	%	%	%	%	%	
Lost Sales M...	%	3%	%	7%	%	%	%	%	
Other	%	5%	%	1%	%	%	%	%	
Blank, No Re...	%	3%	%	5%	%	%	%	%	
No Budget, T...	%	%	%	5%	%	%	%	%	
⊟ Proposal / Re...	%	1%	%	%	%	%	%	%	
No Budget, T...	%	%	%	%	%	5%	%	%	
Blank, No Re...	%	%	%	%	0%	%	%	%	
Other	%	%	%	%	%	0%	7%	%	
Lost Sales M...	%	%	4%	5%	5%	5%	%	%	
⊟ Product Dem...	%	%	%	3%	%	%	%	%	
Blank, No Re...	%	3%	0%	%	%	5%	%	%	
Lost Sales M...	%	4%	1%	5%	%	%	%	%	
No Budget, T...	%	%	%	%	%	%	%	%	
Other	3%	0%	0%	%	0%	%	%	%	

Early / Late Stage (#) as % of Closed Lost Deals Over Time



FILTERS

Close Date
All

BFT (Bucket)
All

Closed Won / Lost
Closed Lost

Early / Late Stage
Multiple selections

Opportunity Type
All

Product Type
All

Primary Use Case
All

Marketing Segment
All

Account Focus
All

SDR / AE Created
All

Inbound / Outbound
All

Closed Lost Reason
All

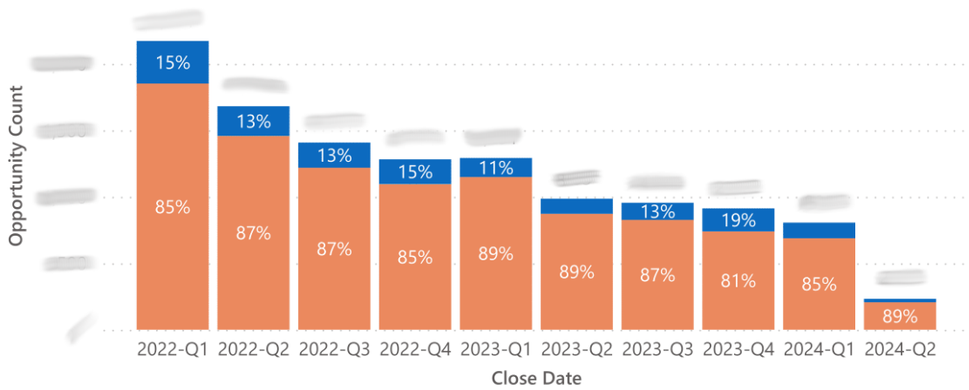
Competitor
All

Company Segment
All

Reset Filters

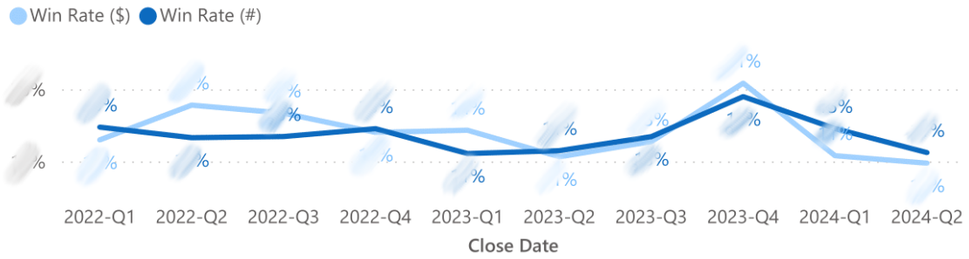
BFT (BUCKET) - LEFT

Closed Won/Lost (#) as % of Deals Over Time



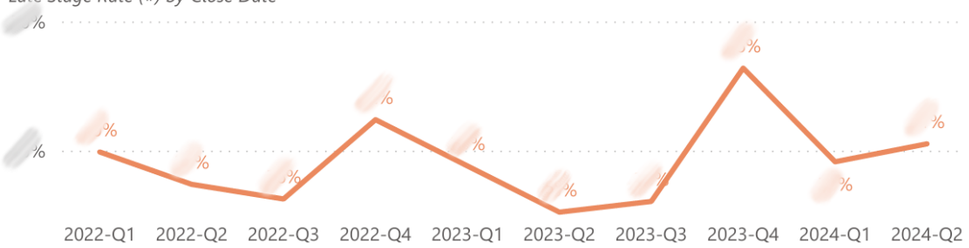
Closed Won (#, $) as % of Deals Over Time

Win Rate (#, $) by Close Date



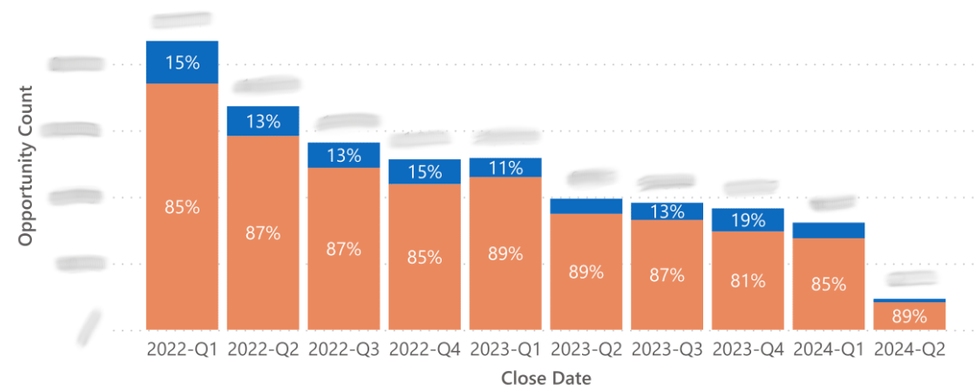
Late Stage (#) as % of Closed Lost Deals Over Time

Late Stage Rate (#) by Close Date



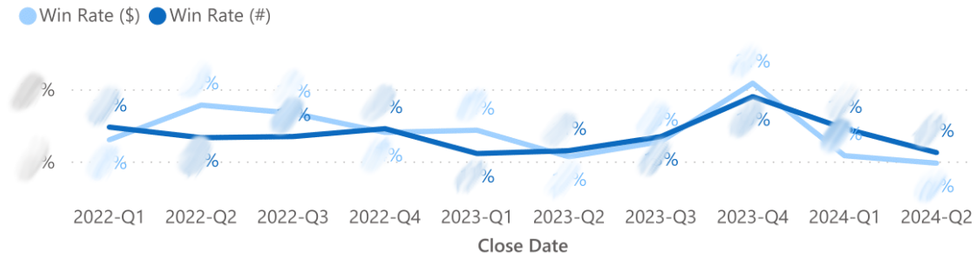
BFT (BUCKET) - RIGHT

Closed Won/Lost (#) as % of Deals Over Time



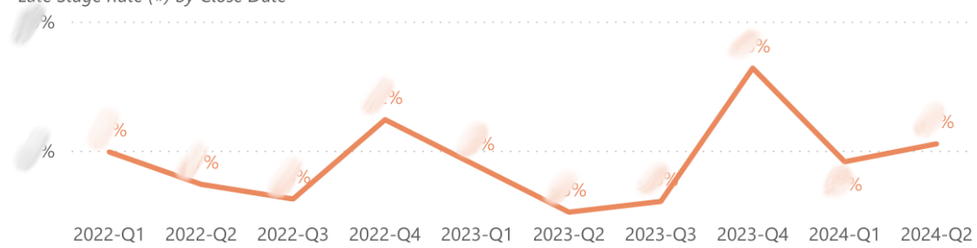
Closed Won (#, $) as % of Deals Over Time

Win Rate (#, $) by Close Date



Late Stage (#) as % of Closed Lost Deals Over Time

Late Stage Rate (#) by Close Date



FILTERS

Close Date
All

BFT (Bucket) - Left
All

BFT (Bucket) - Right
All

Closed Won / Lost
All

Early / Late Stage
All

Opportunity Type
All

Product Type
All

Primary Use Case
All

Marketing Segment
All

Account Focus
All

SDR / AE Created
All

Inbound / Outbound
All

Competitor
All

Company Segment
All

Reset Filters

Opportunity ID 18 Digit	Opportunity Name	Amount (USD)	Close Date	BFT Mapping (Bucket)	Won/Lost	Product Type	Product Type	Ehub ($)	Forums ($)	Go Live ($)	Target ($)	Ace ($)	Competitor
[illegible]	[illegible]	[illegible]	5/24/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	1/5/2022	[illegible]	[illegible]	Webcast Elite 1000	Ehub	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	1/5/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	4/12/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	2/8/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	7/29/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	10/26/20...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	8/15/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	4/12/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	3/29/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	3/28/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	3/6/2024	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	3/8/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	10/5/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	10/18/20...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	2/22/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	1/26/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	9/6/2023	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	2/23/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	10/23/20...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	12/29/20...	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	6/16/2022	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Opportunity ID 18 Digit	Opportunity Name	Amount (USD)	Opportunity Type	Primary Use Case	Marketing Segment	Account Focus	SDR/AE	Lead Source	Stage Lost	Closed Lost Reason	What Happened / Details
[illegible]	[illegible]	[illegible]	[illegible]		Financial Services	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Technology	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Technology	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Technology	[illegible]	[illegible]	Outbound	[illegible]		
[illegible]	[illegible]	[illegible]	[illegible]		Media & Associations	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Technology	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Media & Associations	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Technology	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]		Technology		[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Insurance	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Technology	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Other		[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Other	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Financial Services	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Professional Services	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Insurance	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Financial Services	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Insurance	[illegible]	[illegible]	Outbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	Technology	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	[illegible]
[illegible]	[illegible]	[illegible]	[illegible]		Financial Services	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	
[illegible]	[illegible]	[illegible]	[illegible]		Insurance	[illegible]	[illegible]	Inbound	[illegible]	[illegible]	

Notable *Logic* Behind the Dashboard

Product Type Filter.

	Opportunity_ID_18_Digit__c	Opportunity.Platform Amount	Opportunity.Ace Amount	Opportunity.Engagement Hub Amou...	Opportunity.Go Live Amount	
1	[redacted]	0	0	0	0	
2	[redacted]	0	0	0	0	
3	[redacted]	[redacted]	0	0	0	
4	[redacted]	[redacted]	0	0	0	
5	[redacted]	[redacted]	0	0	0	
6	[redacted]	[redacted]	0	0	0	
7	[redacted]	[redacted]	0	0	0	
8	[redacted]	0	0	0	0	
9	[redacted]	[redacted]	0	0	0	
10	[redacted]	[redacted]	0	0	0	
11	[redacted]	[redacted]	0	0	0	
12	[redacted]	[redacted]	0	0	0	
13	[redacted]	[redacted]	0	0	0	
14	[redacted]	[redacted]	0	0	0	
15	[redacted]	0	0	0	0	
16	[redacted]	[redacted]	0	0	0	
17	[redacted]	0	0	0	0	
18	[redacted]	0	0	0	0	
19	[redacted]	[redacted]	0	0	0	
20	[redacted]	0	0	0	0	
21	[redacted]	0	0	0	0	
22	[redacted]	0	0	0	0	
23	[redacted]	[redacted]	0	0	0	
24	[redacted]	[redacted]	0	0	0	
25	[redacted]	[redacted]	[redacted]	[redacted]	[redacted]	
26	[redacted]	0	0	0	0	
27	[redacted]	[redacted]	0	0	0	
28						

PROPERTIES

Name

OppProductType

All Properties

APPLIED STEPS

- Source
- Navigation
- Choose columns
- Map Opportunity query
- Merge product type fields
- Unpivot other columns by Op...
- Add new Opportunity ID colu...
- Add Product Type column
- Add Amount column
- Remove original columns
- Delete blank rows (Amount = ...
- Rename Ehub row values
- Rename Target row values
- Rename Go Live row values
- Rename Forums row values
- Rename Ace row values
- Rename Platform row values
- Change Amount type to num...

Prior to transformation, an opportunity had a specific product if its amount in that product column was >0.

**Data is blurred or altered for confidentiality*

Product Type Filter.

	Opportunity_ID_18_Digit__c	Attribute	Value
1	[redacted]	Opportunity.Platform Amount	0
2	[redacted]	Opportunity.Ace Amount	0
3	[redacted]	Opportunity.Engagement Hub Amount	0
4	[redacted]	Opportunity.Go Live Amount	0
5	[redacted]	Opportunity.Forums Amount	0
6	[redacted]	Opportunity.Target Amount	0
7	[redacted]	Opportunity.Platform Amount	0
8	[redacted]	Opportunity.Ace Amount	0
9	[redacted]	Opportunity.Engagement Hub Amount	0
10	[redacted]	Opportunity.Go Live Amount	0
11	[redacted]	Opportunity.Forums Amount	0
12	[redacted]	Opportunity.Target Amount	0
13	[redacted]	Opportunity.Platform Amount	[redacted]
14	[redacted]	Opportunity.Ace Amount	0
15	[redacted]	Opportunity.Engagement Hub Amount	0
16	[redacted]	Opportunity.Go Live Amount	0
17	[redacted]	Opportunity.Forums Amount	0
18	[redacted]	Opportunity.Target Amount	0
19	[redacted]	Opportunity.Platform Amount	[redacted]
20	[redacted]	Opportunity.Ace Amount	0
21	[redacted]	Opportunity.Engagement Hub Amount	0
22	[redacted]	Opportunity.Go Live Amount	0
23	[redacted]	Opportunity.Forums Amount	0
24	[redacted]	Opportunity.Target Amount	0
25	[redacted]	Opportunity.Platform Amount	[redacted]
26	[redacted]	Opportunity.Ace Amount	0
27	[redacted]	Opportunity.Engagement Hub Amount	0
28	[redacted]	Opportunity.Go Live Amount	0

PROPERTIES

Name

OppProductType

All Properties

APPLIED STEPS

- Source
- Navigation
- Choose columns
- Map Opportunity query
- Merge product type fields
- Unpivot other columns by Op...
- Add new Opportunity ID colu...
- Add Product Type column
- Add Amount column
- Remove original columns
- Delete blank rows (Amount = ...
- Rename Ehub row values
- Rename Target row values
- Rename Go Live row values
- Rename Forums row values
- Rename Ace row values
- Rename Platform row values
- Change Amount type to num...

Unpivot columns by Opportunity ID so that each row represents a product.

**Data is blurred or altered for confidentiality*

Product Type Filter.

	Opportunity ID 18 Digit	Product Type	Amount
1	[redacted]	Platform	[redacted]
2	[redacted]	Platform	[redacted]
3	[redacted]	Platform	[redacted]
4	[redacted]	Platform	[redacted]
5	[redacted]	Platform	[redacted]
6	[redacted]	Platform	[redacted]
7	[redacted]	Platform	[redacted]
8	[redacted]	Platform	[redacted]
9	[redacted]	Platform	[redacted]
10	[redacted]	Platform	[redacted]
11	[redacted]	Platform	[redacted]
12	[redacted]	Platform	[redacted]
13	[redacted]	Platform	[redacted]
14	[redacted]	Platform	[redacted]
15	[redacted]	Platform	[redacted]
16	[redacted]	Platform	[redacted]
17	[redacted]	Platform	[redacted]
18	[redacted]	Platform	[redacted]
19	[redacted]	Platform	[redacted]
20	[redacted]	Platform	[redacted]
21	[redacted]	Platform	[redacted]
22	[redacted]	Platform	[redacted]
23	[redacted]	Platform	[redacted]
24	[redacted]	Platform	[redacted]
25	[redacted]	Platform	[redacted]
26	[redacted]	Platform	[redacted]
27	[redacted]	Platform	[redacted]
28	[redacted]	Platform	[redacted]

PROPERTIES

Name

OppProductType

All Properties

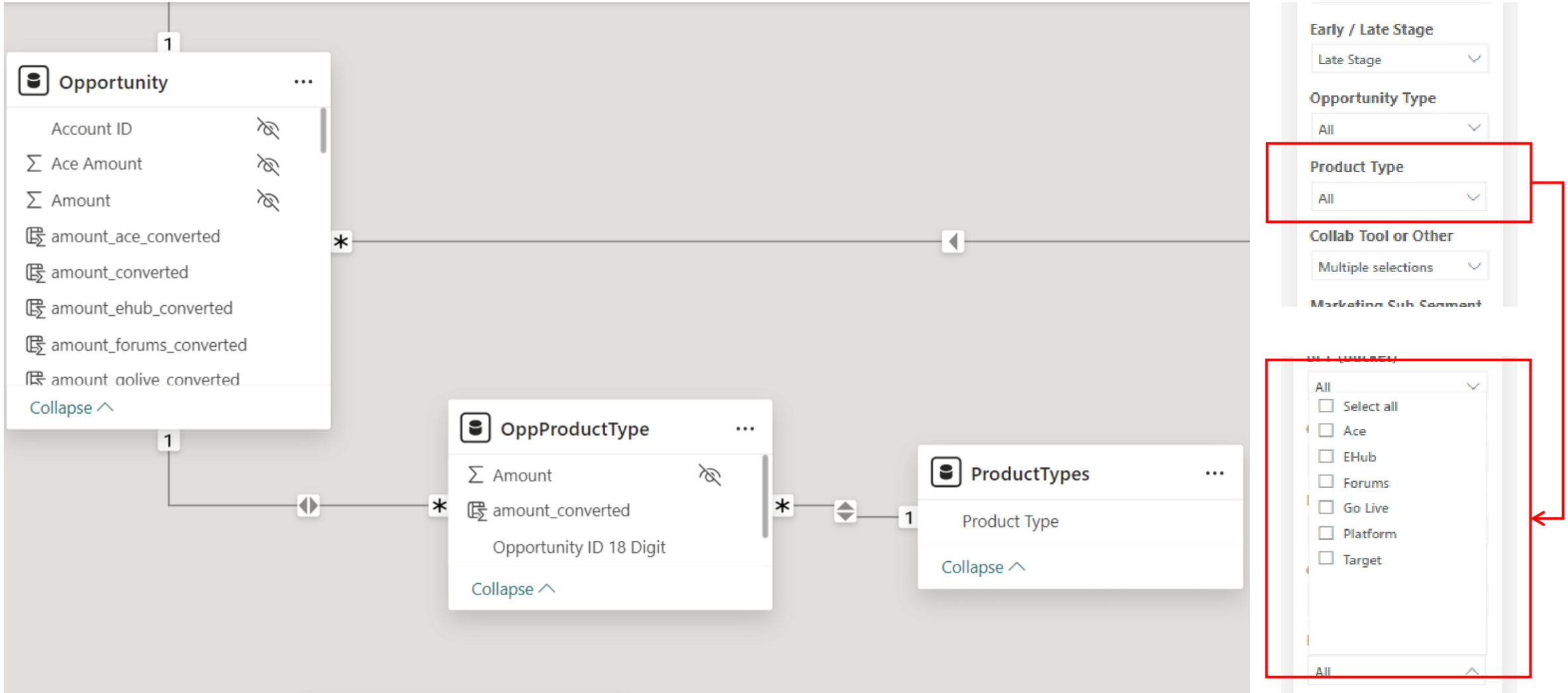
APPLIED STEPS

- Source
- Navigation
- Choose columns
- Map Opportunity query
- Merge product type fields
- Unpivot other columns by Op...
- Add new Opportunity ID colu...
- Add Product Type column
- Add Amount column
- Remove original columns
- Delete blank rows (Amount = ...
- Rename Ehub row values
- Rename Target row values
- Rename Go Live row values
- Rename Forums row values
- Rename Ace row values
- Rename Platform row values
- Change Amount type to num...

Clean up data by removing amounts equal to 0 and renaming Product Type row values.

**Data is blurred or altered for confidentiality*

Product Type Filter.



Establish relationship between Opportunity table and Product Type table, then create Product Type filter.

**Data is blurred or altered for confidentiality*