DOMO

UNIVERSITY

Beast Mode: Example Activity Codes

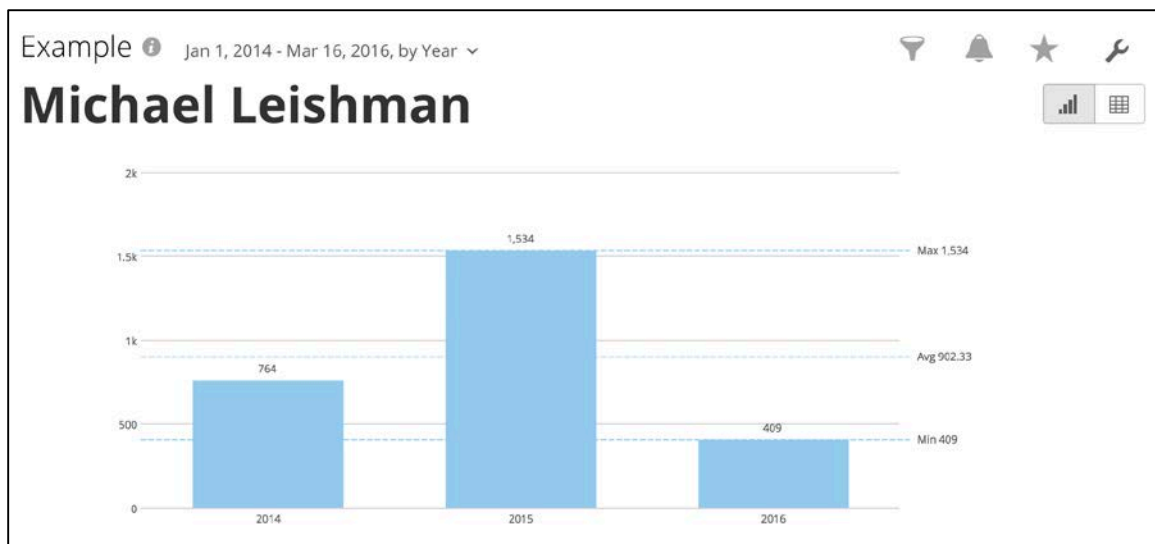## Card #1: Multiple Summary Numbers

Structure of a CONCAT Statement

```
CONCAT('ABC','DEF') → outputs ABCDEF
CONCAT('ABC ',`State`) → outputs ABC Utah, ABC California
```
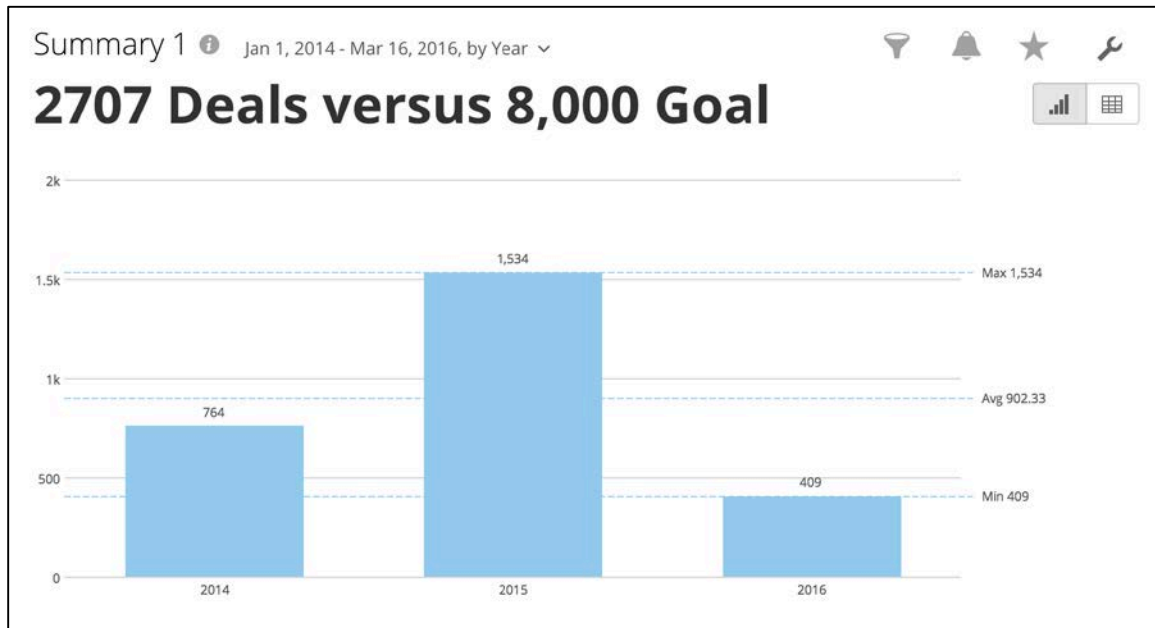
Example 1:

```
MAX(CONCAT('Your First Name','Your Last Name'))
```


Summary 1: Value and Goal

```
CONCAT(COUNT(`Id`),' Deals versus 8,000 Goal')
```

Tips and Tricks:

- Click "Share Calculation on Dataset" or "Apply to Summary Number" when applicable

- Remember to remove Summary Label on multiple summary numbers

- Note that abbreviating amounts ($MM, $B, etc.) can be tricky. See Summary 3 example.

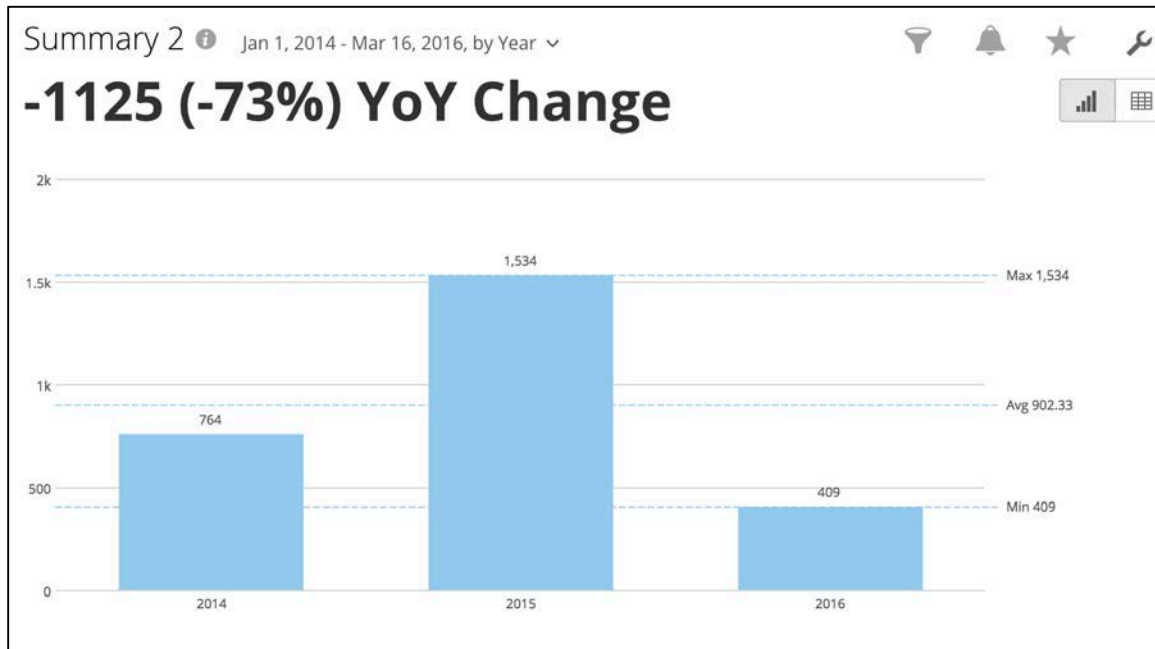**Summary 2: YoY Count and Percent Change**

```
CONCAT(
    COUNT(CASE WHEN YEAR(`CloseDate`)=YEAR(CURRENT_DATE())
    THEN `Id` END) -
    COUNT(CASE WHEN YEAR(`CloseDate`)=(YEAR(CURRENT_DATE())-1)
    THEN `Id` END),

' (', ROUND((

    COUNT(CASE WHEN YEAR(`CloseDate`)=YEAR(CURRENT_DATE())
    THEN `Id` END) -
    COUNT(CASE WHEN YEAR(`CloseDate`)=(YEAR(CURRENT_DATE())-1)
    THEN `Id` END))
    / NULLIF(COUNT(CASE WHEN
    YEAR(`CloseDate`)=(YEAR(CURRENT_DATE())-1) THEN `Id`
    END),0)*100,0),'%) YoY Change')
```
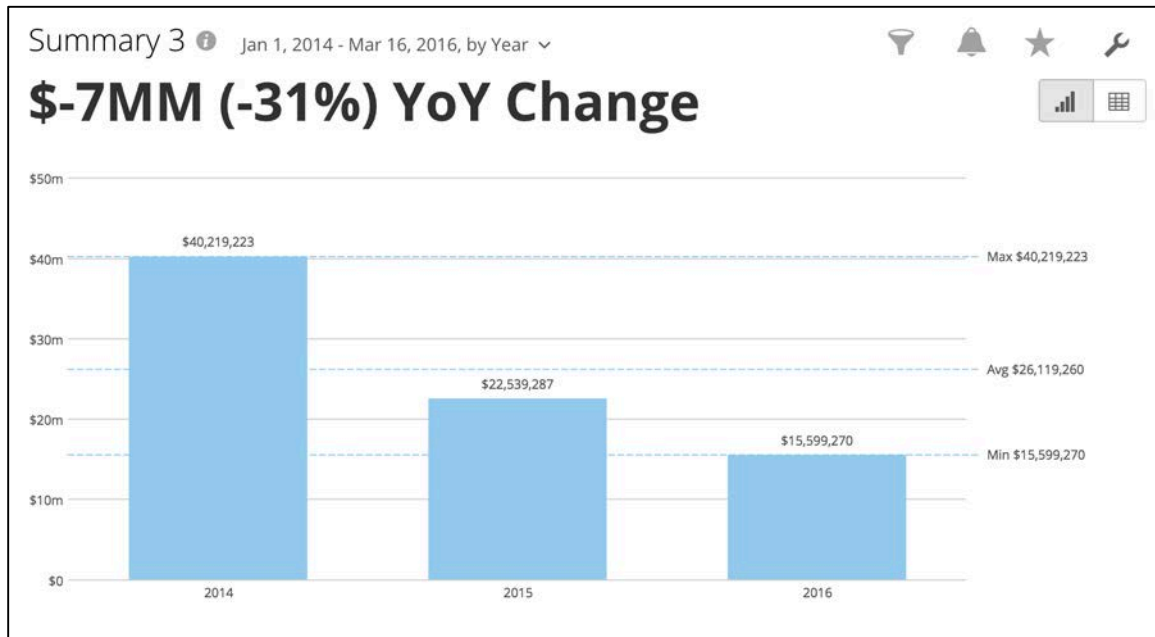
Summary 3: YoY Amount and Percent Change

```
CONCAT(
    '$',ROUND((SUM(CASE WHEN
    YEAR(`CloseDate`)=YEAR(CURRENT_DATE()) THEN `Amount` END)
    -
    SUM(CASE WHEN YEAR(`CloseDate`)=(YEAR(CURRENT_DATE())-1)
    THEN `Amount` END))
    /1000000,0),

    'MM (',ROUND((SUM(CASE WHEN
    YEAR(`CloseDate`)=YEAR(CURRENT_DATE()) THEN `Amount` END)
    -
    SUM(CASE WHEN YEAR(`CloseDate`)=(YEAR(CURRENT_DATE())-1)
    THEN `Amount` END))
    / NULLIF(SUM(CASE WHEN
    YEAR(`CloseDate`)=(YEAR(CURRENT_DATE())-1) THEN `Amount`
    END),0)*100,0)
    ,'%) YoY Change')
```

Summary 4: Q-PQ, Q/Q, and Y/Y Percent Change

```
CONCAT
    (Round((100*((COUNT(
    CASE WHEN QUARTER(`CloseDate`) = QUARTER(CURRENT_DATE())
    AND YEAR(`CloseDate`)=YEAR(CURRENT_DATE()) THEN `Id` End)
    /
    COUNT(CASE WHEN (YEAR(`CloseDate`)=YEAR(CURRENT_DATE())
    AND QUARTER(`CloseDate`) = QUARTER(CURRENT_DATE())-1) OR
    (QUARTER(CURRENT_DATE()) = 1 AND YEAR(`CloseDate`) =
    YEAR(CURRENT_DATE())-1 AND QUARTER(`CloseDate`) = 4) THEN
    `Id` End))-1)),.0),' % Q-PQ | ',

    Round((100*((COUNT(Case when
    QUARTER(`CloseDate`)=QUARTER(CURRENT_DATE()) AND
    Year(`CloseDate`)=Year(CURRENT_DATE()) then `Id` END))
    /
    (COUNT(Case when
    QUARTER(`CloseDate`)=QUARTER(CURRENT_DATE()) AND
    Year(`CloseDate`)=(Year(CURRENT_DATE())-1) then `Id`
    END))-1)),.0),' % Q/Q | ',

    Round((100*((COUNT(Case when
    YEAR(`CloseDate`)=Year(CURRENT_DATE()) then `Id` END))
    /
    (COUNT(Case when YEAR(`CloseDate`)=(Year(CURRENT_DATE())-
    1) then `Id` END))-1)),.0),' % Y/Y')
```
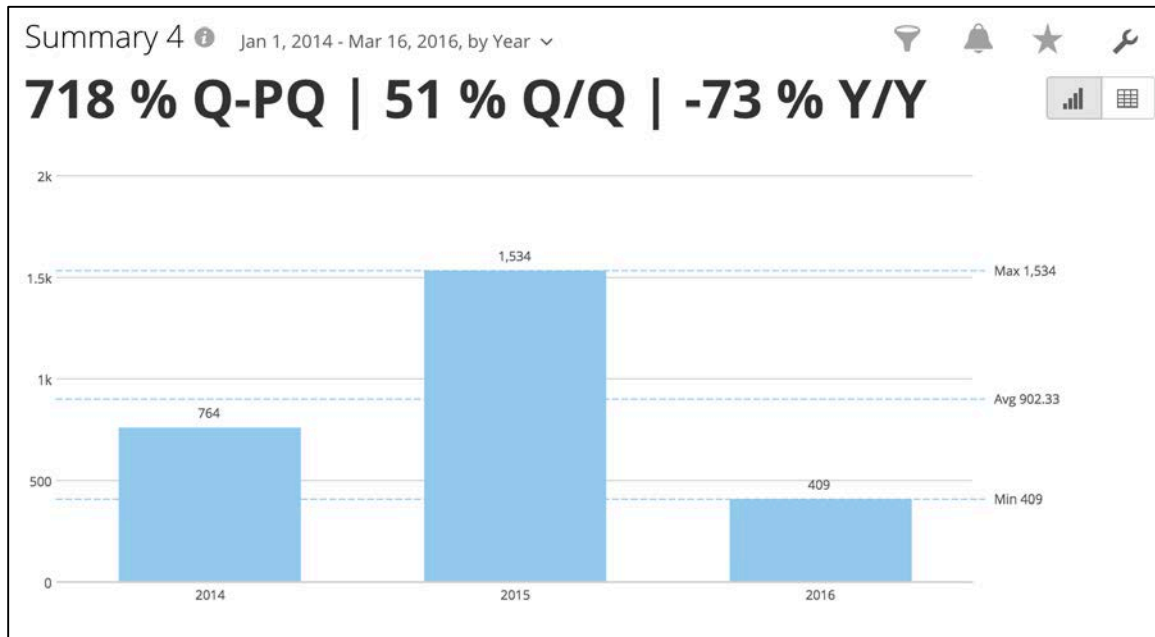
Summary 4 ⓘ   Jan 1, 2014 - Mar 16, 2016, by Year ⌄

718 % Q-PQ | 51 % Q/Q | -73 % Y/Y

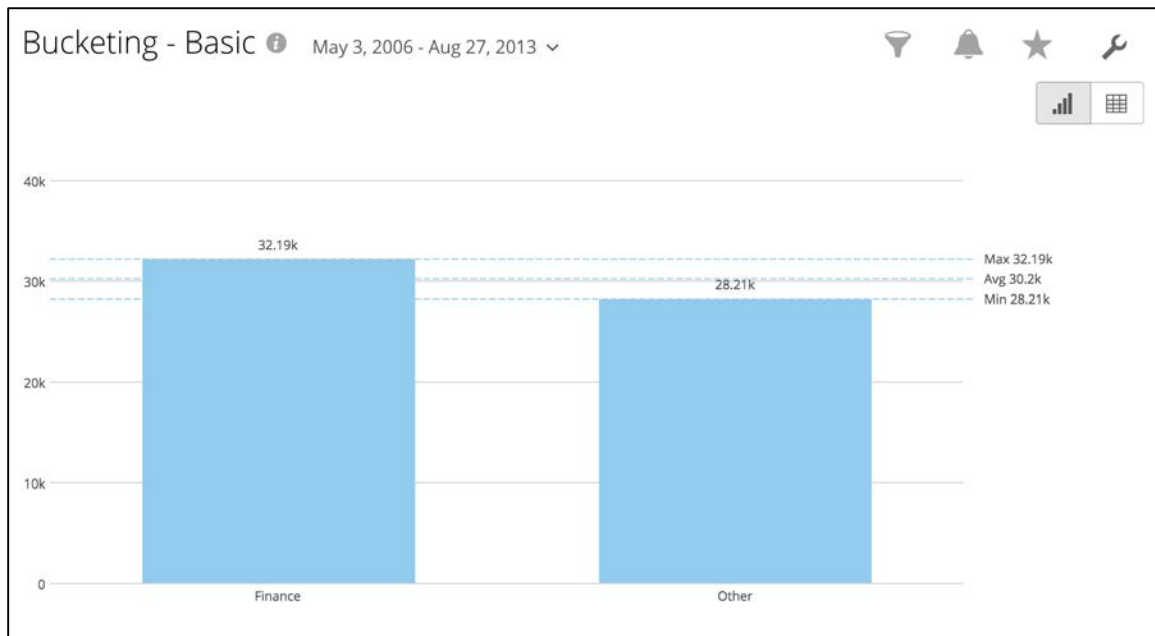## Card #2 : Bucketing

Basic Bucket

```
CASE WHEN `Account_Industry` = 'Finance' THEN 'Finance'
     ELSE 'Other' END
```


Bucketing - Basic ⓘ   May 3, 2006 - Aug 27, 2013 ⌄

Advanced Bucket

```
CASE `Account_Industry`
      WHEN 'Finance' THEN 'Finance'
      WHEN 'Energy' THEN 'Energy'
      WHEN 'Technology' THEN 'Technology'
      WHEN 'Transportation' THEN 'Transportation'
      ELSE 'Other'
END
```

Above Goal

```
CASE  WHEN avg(`Amount`) >= 30000 THEN avg(`Amount`) END
```
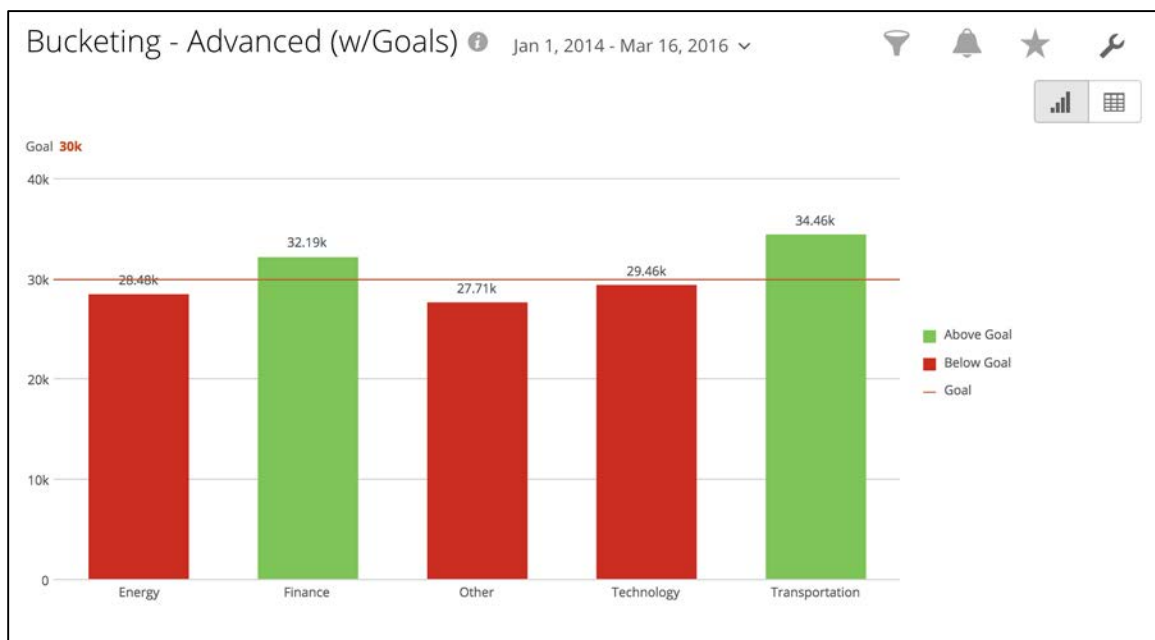
Below Goal

```
CASE WHEN avg(`Amount`) < 30000 THEN avg(`Amount`) END
```

Alerts

From outside of card, click on "Alert" bell icon, then add a new alert with these settings:

- "Any Item"
- "Is Less Than or Equal To"
- 30000

Card #3: Table Cards

Opportunity Link

```
CONCAT('<a href= https://CRM.com/',`Id`,' target = new> Go to
Opportunity </a>')
```

Image

```
CASE
    WHEN `Amount` >= 1000000 THEN '<img
    src=http://goo.gl/Zwgpxb height="100" maxwidth="100"></>'
    WHEN `Amount` >= 500000 THEN '<img
    src=http://goo.gl/PhwHm0 height="100" maxwidth="100"></>'
    ELSE '<img src="http://goo.gl/fTycTF" height="100"
    maxwidth="100"></>'
END
```

Status Icon

```
CASE
    WHEN `Amount` >= 1000000 THEN '<div style="color:green;
    font-size:150px"> · </div>'
    WHEN `Amount` >= 500000 THEN '<div style="color:orange;
    font-size:150px"> - </div>'
    ELSE '<div style="color:red; font-size:50px; text-
    align:center; position:relative"> ↓ </div>'
END
```


Opportunity Link	Image	Status Icon	Amount	Id	Name	Account_Name	Account_Industry	date differences
Go to Opportunity		●	$3,000,000	006R0000008KcWdlAK	Cempra, Inc.	Cempra, Inc.	Health Care	71
Go to Opportunity		●	$2,500,000	006R0000008Kd1uIAC	Merrill Lynch Depositor, Inc.	Merrill Lynch Depositor, Inc.	Finance	355
Go to Opportunity		●	$1,500,000	006R0000008KcvHIAS	James Hardie Industries plc.	James Hardie Industries plc.	Capital Goods	358

Table Cards Aug 7, 2013 - Dec 1, 2015

$78m Total Amount

Tips and Tricks

- Opportunity links are especially useful in final drill path table cards to take action on an opportunity
- We recommend clicking "Prevent drilling to final data grid view" on the final drill level. The opportunity link will still work, but other drilling will be disabled.
- Note that double quotes are needed for image beast mode (...img src="URL')
- The allowed HTML is listed in the following image:

<a>	**href="http://..."**	**The url must begin with http, https or mailto. It cannot be a partial or relative path. All other hrefs will be removed.**
	target="target"	
** **		
<div>	Style	see "Style Attribute Below"
	Align	
	Width	
	Title	
<font>	Style	see "Style Attribute Below"
	color	
	Size	
<img>	style	see "Style Attribute Below"
	alt	
	align	
	border	
	class	
	height	
	title	
	width	
<span>	style	see "Style Attribute Below"
<p>	style	see "Style Attribute Below"
<h1>	style	see "Style Attribute Below"
<h2>	style	see "Style Attribute Below"
<h3>	style	see "Style Attribute Below"
<h4>	style	see "Style Attribute Below"

Style attributes allowed (all others will be removed)
background-color, border,color,float,font-color,font-size,font-weight, Height,left,margin,
margin-left,margin-right,max-height,max-width, Padding,position,text-align,top,vertical-align,
white-space,width,word-wrap,z-index

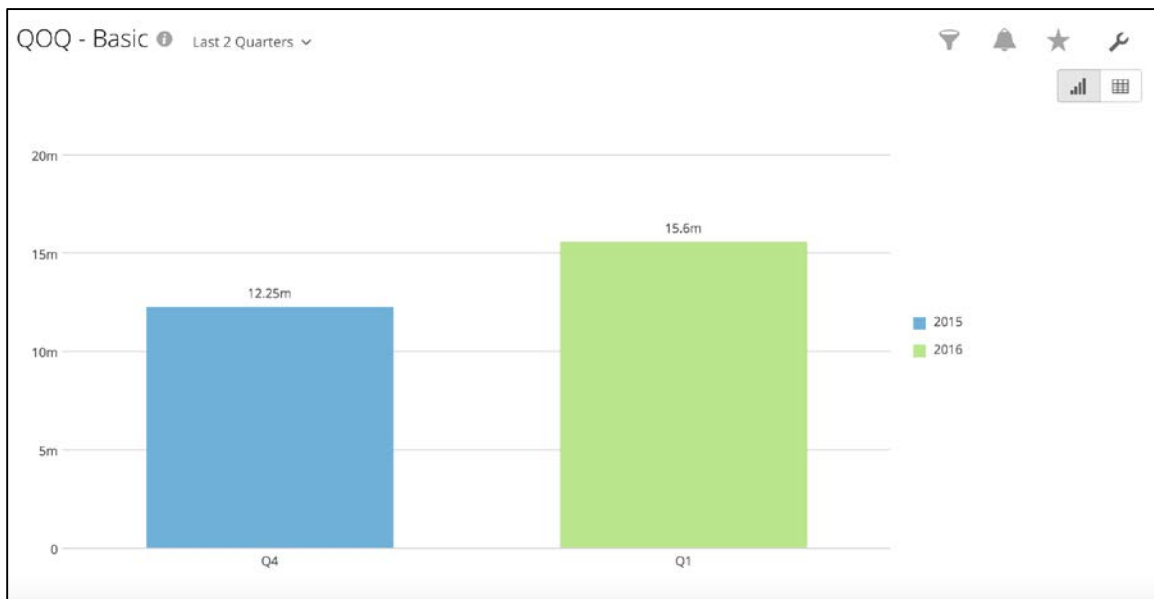## Card #4: Period over Period (Quarter over previous Quarter)

Basic QoQ

Quarter:

```
Concat('Q',Quarter(`CloseDate`))
```

Year:

```
Year(`CloseDate`)
```


Advanced QoQ

QoQ This Quarter:

```
Case when Year(`CloseDate`) = Year(curdate()) and
Quarter(`CloseDate`) = Quarter(CURDATE()) then `Amount` end
```

QoQ Last Quarter:

```
Case when Quarter(curdate()) = 1 then
    Case when Year(`CloseDate`) = Year(curdate()) - 1 and
    Quarter(`CloseDate`) = 4 then `Amount` end
  Else
    Case when Year(`CloseDate`) = Year(curdate()) and
    Quarter(`CloseDate`) = Quarter(curdate()) -1 then `Amount`
    end
End
```

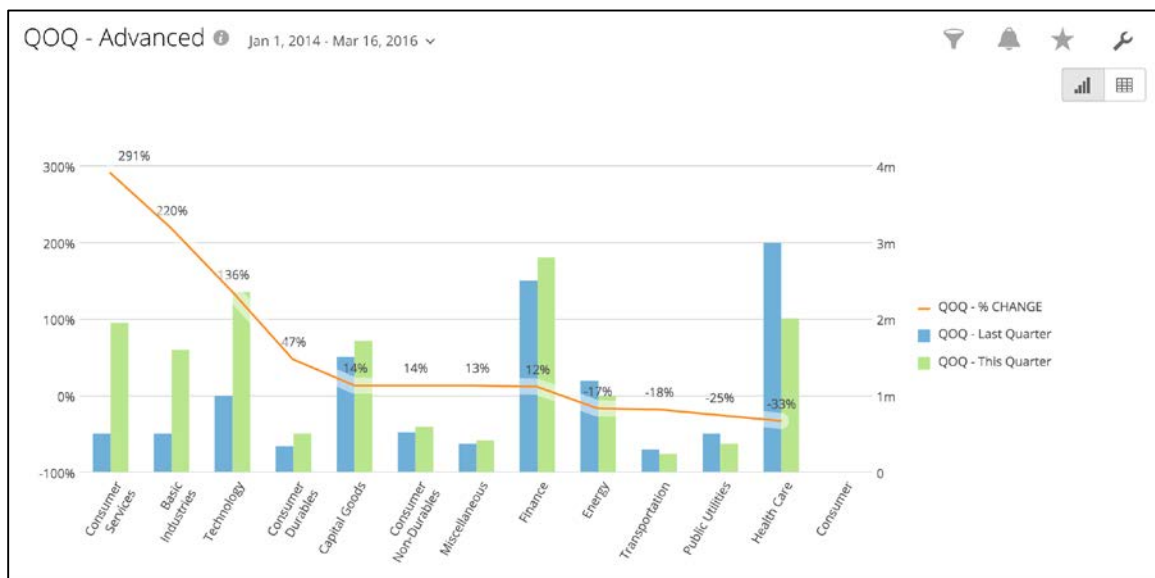QoQ % Change:

```
(SUM(Case when Year(`CloseDate`) = Year(curdate()) and
Quarter(`CloseDate`) = Quarter(CURDATE()) then `Amount` end)
/
SUM(Case when Quarter(curdate()) = 1 then
      Case when Year(`CloseDate`) = Year(curdate()) - 1 and
      Quarter(`CloseDate`) = 4 then `Amount` end
   Else
      Case when Year(`CloseDate`) = Year(curdate()) and
      Quarter(`CloseDate`) = Quarter(curdate()) -1 then `Amount`
      end
end)) -1
```


QoQ This Quarter: Level 1

```
Case when Year(`CloseDate`) = Year(curdate()) and
Quarter(`CloseDate`) = Quarter(CURDATE()) then `Amount` end
```

QoQ Last Quarter: Level 1

```
Case when Quarter(curdate()) = 1 then
    Case when Year(`CloseDate`) = Year(curdate()) - 1 and
    Quarter(`CloseDate`) = 4 then `Amount` end
  Else
    Case when Year(`CloseDate`) = Year(curdate()) and
    Quarter(`CloseDate`) = Quarter(curdate()) -1 then `Amount`
    end
end
```

QoQ % Change: Level 2

```
(SUM(Case when Year(`CloseDate`) = Year(curdate()) and
Quarter(`CloseDate`) = Quarter(CURDATE()) then `Amount` end)
/
SUM(Case when Quarter(curdate()) = 1 then
      Case when Year(`CloseDate`) = Year(curdate()) - 1 and
      Quarter(`CloseDate`) = 4 then `Amount` end
    Else
      Case when Year(`CloseDate`) = Year(curdate()) and
      Quarter(`CloseDate`) = Quarter(curdate()) -1 then `Amount`
      end
end)) -1
```

QoQ Last Quarter (Modified): Level 3

```
(SUM(CASE WHEN QUARTER(curdate()) = QUARTER(`CloseDate`) AND
YEAR(`CloseDate`) = YEAR(curdate()) THEN `Amount` ELSE 0 END)
    /
MAX(CASE WHEN YEAR(curdate()) / 4 = ROUND((YEAR(curdate()) /
4),0) THEN
    CASE WHEN QUARTER(curdate())=1 THEN (DAYOFYEAR(curdate())
    - 1)
         WHEN (QUARTER(curdate())=2) THEN
         (DAYOFYEAR(curdate()) - 91)
    WHEN (QUARTER(curdate())=3) THEN (DAYOFYEAR(curdate()) -
    182)
         WHEN (QUARTER(curdate())=4) THEN
         (DAYOFYEAR(curdate()) - 273)
       ELSE 0 END
         ELSE
    CASE WHEN QUARTER(curdate())=1 THEN DAYOFYEAR(curdate()) -
    1
         WHEN QUARTER(curdate())=2 THEN DAYOFYEAR(curdate()) -
         90
             WHEN QUARTER(curdate())=3 THEN
             DAYOFYEAR(curdate()) - 181
             WHEN QUARTER(curdate())=4 THEN
             DAYOFYEAR(curdate()) - 272
             ELSE 0 END
    END)
```

(Continues onto next page)

```
*
MAX(CASE WHEN YEAR(curdate()) / 4=ROUND(YEAR(curdate()) / 4,0)
THEN
         CASE WHEN (QUARTER(curdate())=1) THEN 91
              WHEN (QUARTER(curdate())=2) THEN 91
              WHEN (QUARTER(curdate())=3) THEN 92
              WHEN (QUARTER(curdate())=4) THEN 92
              ELSE 0   END
                ELSE
         CASE WHEN (QUARTER(curdate())=1) THEN 90
                      WHEN (QUARTER(curdate())=2) THEN 91
              WHEN (QUARTER(curdate())=3) THEN 92
              WHEN (QUARTER(curdate())=4) THEN 92
              ELSE 0 END
    END)
-
MAX(CASE WHEN YEAR(curdate()) / 4=ROUND(YEAR(curdate()) / 4,0)
THEN
      CASE WHEN QUARTER(curdate())=1 THEN DAYOFYEAR(curdate()) –
      1
      WHEN QUARTER(curdate())=2 THEN DAYOFYEAR(curdate()) – 91
      WHEN QUARTER(curdate())=3 THEN DAYOFYEAR(curdate()) – 182
      WHEN QUARTER(curdate())=4 THEN DAYOFYEAR(curdate()) – 273
      ELSE 0 END
    ELSE CASE
      WHEN QUARTER(curdate())=1 THEN DAYOFYEAR(curdate()) – 1
      WHEN QUARTER(curdate())=2 THEN DAYOFYEAR(curdate()) – 90
      WHEN QUARTER(curdate())=4 THEN DAYOFYEAR(curdate()) - 272
      ELSE 0 END
END)
+
SUM(CASE WHEN QUARTER(curdate())=QUARTER(`CloseDate`) AND
YEAR(`CloseDate`)=YEAR(curdate()) THEN `Amount` ELSE 0 END)
-
SUM((CASE WHEN ((QUARTER(curdate())=QUARTER(`CloseDate`)) AND
(YEAR(`CloseDate`)=YEAR(DATE_SUB(curdate(),INTERVAL 1
QUARTER)))) THEN `Amount` ELSE 0 END ))) / SUM((CASE  WHEN
QUARTER(DATE_SUB(curdate(),INTERVAL 1
QUARTER))=QUARTER(`CloseDate`) AND
YEAR(`CloseDate`)=YEAR(DATE_SUB(curdate(),INTERVAL 1 QUARTER))
THEN `Amount` ELSE 0 END ))
```