TABLEAU CONFERENCE

Get on My Level

Mastering LOD Calculations

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Wifi: | Password:

https://github.com/eliblankers/TC24-GetOnMyLevel

Forward Looking Statements

This presentation contains forward-looking statements about, among other things, trend analyses and future events, future financial performance, anticipated growth, industry prospects, environmental, social and governance goals, and the anticipated benefits of acquired companies. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, Salesforce's results could differ materially from the results expressed or implied by these forward-looking statements. The risks and uncertainties referred to above include those factors discussed in Salesforce's reports filed from time to time with the Securities and Exchange Commission, including, but not limited to: impact of, and actions we may take in response to, the COVID-19 pandemic, related public health measures and resulting economic downturn and market volatility; our ability to maintain security levels and service performance meeting the expectations of our customers, and the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate performance degradation and security breaches; the expenses associated with our data centers and third-party infrastructure providers; our ability to secure additional data center capacity; our reliance on third-party hardware, software and platform providers; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; current and potential litigation involving us or our industry, including litigation involving acquired entities such as Tableau Software, Inc. and Slack Technologies, Inc., and the resolution or settlement thereof; regulatory developments and regulatory investigations involving us or affecting our industry; our ability to successfully introduce new services and product features, including any efforts to expand our services; the success of our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; our ability to complete, on a timely basis or at all, announced transactions; our ability to realize the benefits from acquisitions, strategic partnerships, joint ventures and investments, including our July 2021 acquisition of Slack Technologies, Inc., and successfully integrate acquired businesses and technologies; our ability to compete in the markets in which we participate; the success of our business strategy and our plan to build our business, including our strategy to be a leading provider of enterprise cloud computing applications and platforms; our ability to execute our business plans; our ability to continue to grow unearned revenue and remaining performance obligation; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; our ability to limit customer attrition and costs related to those efforts; the success of our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our ability to preserve our workplace culture, including as a result of our decisions regarding our current and future office environments or work-from-home policies; our dependency on the development and maintenance of the infrastructure of the Internet; our real estate and office facilities strategy and related costs and uncertainties; fluctuations in, and our ability to predict, our operating results and cash flows; the variability in our results arising from the accounting for term license revenue products; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within our strategic investment portfolio; our ability to protect our intellectual property rights; our ability to develop our brands; the impact of foreign currency exchange rate and interest rate fluctuations on our results; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; uncertainties regarding our tax obligations in connection with potential jurisdictional transfers of intellectual property, including the tax rate, the timing of the transfer and the value of such transferred intellectual property; uncertainties regarding the effect of general economic and market conditions; the impact of geopolitical events; uncertainties regarding the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; the ability to execute our Share Repurchase Program; our ability to comply with our debt covenants and lease obligations; the impact of climate change, natural disasters and actual or threatened public health emergencies; and our ability to achieve our aspirations, goals and projections related to our environmental, social and governance initiatives.

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Leah Purdy

Lead Solution Engineer @ Tableau

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Principal Solution Engineer @ Tableau

Session Format

Exercises

Challenges

Jedi Challenge

Questions? Raise your hand

Jedi Challenges

Surveys & Sets

Top Sales Reps

Benchmark Year (BY)

2020

Sales Representative	Sales	Winning Amount	Winner Comparison Rate
Sean Miller	$25,043	$23,661	100%
Peter Fuller	$9,063	$9,022	38%
Tamara Chand	$19,052	$18,344	78%
Raymond Buch	$15,117	$14,203	60%
Patrick O'Donnell	$2,493	$467	2%

Conditional Formatting Pivot

		Central				East				South				West		
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class
Furniture	Discount	20	8	31	84	16	7	19	51	6	2	6	26	17	5	18
	Profit	-661	-207	-1,581	-422	1,566	98	71	1,311	1,173	98	1,592	3,909	990	808	4,144
	Quantity	263	103	343	1,118	383	130	433	1,268	173	45	273	800	419	175	520
	Sales	21,038	8,842	31,187	102,730	29,411	12,853	44,036	121,992	20,263	2,926	26,910	67,199	40,019	14,528	54,156
Office Supplies	Discount	52	16	59	233	48	14	37	146	23	7	26	111	32	10	28
	Profit	930	406	6,100	1,443	6,927	2,047	6,333	25,707	2,707	1,195	3,137	12,947	7,836	2,775	11,498
	Quantity	665	235	1,063	3,446	1,105	332	1,249	3,776	507	208	798	2,287	1,095	372	1,370
	Sales	19,390	5,819	34,307	107,510	36,483	9,125	43,205	116,703	16,824	4,289	30,598	73,940	28,635	9,858	52,573
Technology	Discount	8	3	15	30	13	5	14	45	5	3	5	20	15	4	14
	Profit	3,438	1,333	4,595	24,331	7,239	5,835	4,384	30,005	3,012	-3,055	9,939	10,096	13,813	4,559	7,235
	Quantity	228	54	389	873	317	111	344	1,170	150	71	223	674	388	124	418

Lab Access & Wifi

Signal: TC23HOTS

Password: HOTS@TC23

1. Log into the event: sforce.co/tc23attendee
2. Navigate to **Sessions**
3. Click on the tab for today
4. Search for **#HandsOn**
5. Click **Access lab**

OR github.com/eliblankers/GetOnMyLevelTC23.git

Agenda

01 Intro to LODs

02 Selecting Comparisons

03 Pivoting

04 Pivot, Isolate, Propogate

Multiple Aggregations

(Intro Exercise)

What is the average Sales amount per Order

Order ID	Product Name	Sales
CA-2013-144015	Premier Electric Letter Opener	48
CA-2013-144015	OIC Binder Clips	85
CA-2013-144015	Ampad Phone Message Book, Recycled, 400 Message Capacity, 5 ¾" x 11"	58
CA-2013-147109	Xerox 214	67
CA-2013-147109	WD My Passport Ultra 1TB Portable External Hard Drive	82
CA-2014-112004	Compact Automatic Electric Letter Opener	76
CA-2014-112004	Avery Metallic Poly Binders	55
CA-2014-125451	Wirebound Message Book, 4 per Page	50
CA-2014-125451	Office Impressions End Table, 20-1/2"H x 24"W x 20"D	52
CA-2014-125451	KI Adjustable-Height Table	54

What is the average Sales amount per Order

Order ID	Product Name	Sales
CA-2013-144015	Premier Electric Letter Opener	48
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AVG(Sales)

What is the average Sales amount per Order

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Order ID	Product Name	Sales
CA-2013-144015	Premier Electric Letter Opener	48
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CA-2014-125451	KI Adjustable-Height Table	54

~~AVG(Sales)~~

Order ID	Sales
CA-2013-144015	191
CA-2013-147109	149
CA-2014-112004	131
CA-2014-125451	156

What is the average Sales amount per Order

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Order ID	Product Name	Sales
CA-2013-144015	Premier Electric Letter Opener	48
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~~AVG(Sales)~~

Order ID	Sales
CA-2013-144015	191
CA-2013-147109	149
CA-2014-112004	131
CA-2014-125451	156

```
AVG(  { FIXED [Order ID] : SUM([Sales]) } )
```

Selection Comparisons

(Exercise 1a)

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

Customer Name	Sub-Category	Sales
Sean Miller	Fasteners	$ 1,024
Sean Miller	Machines	$ 55
Sean Miller	Supplies	$ 580
Sean Miller	Chairs	$ 2,037
Tamara Chand	Fasteners	$ 450
Tamara Chand	Machines	$ 279
Tamara Chand	Tables	$ 171
Adrian Barton	Machines	$ 37
Becky Martin	Binders	$ 129

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

Customer Name	Sub-Category	Sales
Sean Miller	Fasteners	$ 1,024
Sean Miller	Machines	$ 55
Sean Miller	Supplies	$ 580
Sean Miller	Chairs	$ 2,037
Tamara Chand	Fasteners	$ 450
Tamara Chand	Machines	$ 279
Tamara Chand	Tables	$ 171
Adrian Barton	Machines	$ 37
Becky Martin	Binders	$ 129

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

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Customer Name	Sub-Category	Sales
Sean Miller	Fasteners	$ 1,024
Sean Miller	Machines	$ 55
Sean Miller	Supplies	$ 580
~~Sean Miller~~	~~Chairs~~	~~$ 2,037~~
Tamara Chand	Fasteners	$ 450
Tamara Chand	Machines	$ 279
~~Tamara Chand~~	~~Tables~~	~~$ 171~~
Adrian Barton	Machines	$ 37
~~Becky Martin~~	~~Binders~~	~~$ 129~~

OR

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

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Customer Name	Sub-Category	Sales
Sean Miller	Fasteners	$ 1,024
Sean Miller	Machines	$ 55
Sean Miller	Supplies	$ 580
Sean Miller	Chairs	$ 2,037
~~Tamara Chand~~	~~Fasteners~~	~~$ 450~~
~~Tamara Chand~~	~~Machines~~	~~$ 279~~
~~Tamara Chand~~	~~Tables~~	~~$ 171~~
~~Adrian Barton~~	~~Machines~~	~~$ 37~~
~~Becky Martin~~	~~Binders~~	~~$ 129~~

Sub-Category

- [ ] (All)
- [ ] Binders
- [ ] Chairs
- [x] Fasteners
- [x] Machines
- [x] Supplies
- [ ] Tables

AND

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

TABLEAU CONFERENCE

Customer Name	Sub-Category	Sales
Sean Miller	Fasteners	$ 1,024
Sean Miller	Machines	$ 55
Sean Miller	Supplies	$ 580
Sean Miller	Chairs	$ 2,037
~~Tamara Chand~~	~~Fasteners~~	~~$ 450~~
~~Tamara Chand~~	~~Machines~~	~~$ 279~~
~~Tamara Chand~~	~~Tables~~	~~$ 171~~
~~Adrian Barton~~	~~Machines~~	~~$ 37~~
~~Becky Martin~~	~~Binders~~	~~$ 129~~

Sub-Category

- [ ] (All)
- [ ] Binders
- [ ] Chairs
- [x] Fasteners
- [x] Machines
- [x] Supplies
- [ ] Tables

AND

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

Customer Name	COUNTD(Sub-Category)
Sean Miller	3
Tamara Chand	2
Adrian Barton	1
Becky Martin	0

Sub-Category

- [ ] (All)
- [ ] Binders
- [ ] Chairs
- [x] Fasteners
- [x] Machines
- [x] Supplies
- [ ] Tables

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

Customer Name	COUNTD(Sub-Category)	# of SubCategories
Sean Miller	3	4
Tamara Chand	2	3
Adrian Barton	1	1
Becky Martin	0	1

Sub-Category

- [ ] (All)
- [ ] Binders
- [ ] Chairs
- [x] Fasteners
- [x] Machines
- [x] Supplies
- [ ] Tables

```
{ FIXED [Customer Name] : COUNTD([Sub-Category]) }
```

Tableau Order of Operations

FIXED is <u>before</u> Dimension Filters

FIXED is <u>after</u> Context Filters

INCLUDE/EXCLUDE is after both

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

Customer Name	COUNTD(Sub-Category)	# of SubCategories
Sean Miller	3	4
Tamara Chand	2	3
Adrian Barton	1	1
Becky Martin	0	1

Sub-Category

- [ ] (All)
- [ ] Binders
- [ ] Chairs
- [x] Fasteners
- [x] Machines
- [x] Supplies
- [ ] Tables

```
{ FIXED [Customer Name] : COUNTD([Sub-Category]) }
```

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

Customer Name	COUNTD(Sub-Category)	# of SubCategories
Sean Miller	3	~~4~~ 3
Tamara Chand	2	~~3~~ 2
Adrian Barton	1	~~1~~ 1
Becky Martin	0	~~1~~ 0

```
{ FIXED [Customer Name] : COUNTD([Sub-Category]) }
```

Which Customers purchased ‘Fasteners’, ‘Machines’, & ‘Supplies’?

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Customer Name	COUNTD(Sub-Category)	# of SubCategories
Sean Miller	3	~~4~~ 3
Tamara Chand	2	~~3~~ 2
Adrian Barton	1	~~1~~ 1
Becky Martin	0	~~1~~ 0

Sub-Category

- [ ] (All)
- [ ] Binders
- [ ] Chairs
- [x] Fasteners
- [x] Machines
- [x] Supplies
- [ ] Tables

```
{ FIXED [Customer Name] : COUNTD([Sub-Category]) }
```

= { FIXED : COUNTD([Sub-Category]) } = ~~6~~ 3

Selection Comparisons

(Challenge 1b)

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1b - Challenge Show all the data for Customers that have purchased from all the Sub-Categories selected in the Set list. Select Fasteners, Machines, and Supplies.

	Sub-Category															
Customer N..	Fasten..	Machi..	Suppli..	Access..	Applia..	Art	Binders	Bookc..	Chairs	Envelo..	Furnis..	Labels	Paper	Phones	Storage	Tables
Arthur Pric..	$41	$686	$7	$93	$100	$244	$154	$181	$113	$24	$233		$400	$144	$62	$843
Caroline Ju..	$12	$4,000	$3	$240	$395	$100	$103	$1,200	$4,058		$75	$44				$933
Chloris Kast..	$25	$1,070	$19	$172	$58	$215	$227		$128	$90	$227		$165	$638	$118	
Christine S..	$5	$480	$28	$1,100	$187	$73	$91	$242	$233	$15		$10	$376	$362		
Dean Katz	$17	$482	$9		$862	$3	$18		$770	$31	$3		$48	$24	$2,223	$313
Greg Tran	$46	$1,380	$42		$208	$69	$2,311	$4,008	$2,167	$51	$44		$654	$597	$243	
Maxwell Sc..	$4	$838	$311	$280	$43		$98		$533	$136			$126	$46	$729	
Scott Cohen	$6	$240	$39	$70	$34	$7	$248	$1,553			$10		$75	$80	$714	$654
Sean Miller	$19	$23,460	$3	$22		$8	$100				$680		$89		$663	
Stewart Vis..	$6	$372	$25	$28	$42	$79	$38		$2,044		$75		$148	$451	$434	$365

Selected Sub-Categories

- [ ] (All)
- [ ] Accessories
- [ ] Appliances
- [ ] Art
- [ ] Binders
- [ ] Bookcases
- [ ] Chairs
- [ ] Copiers
- [ ] Envelopes
- [x] Fasteners
- [ ] Furnishings
- [ ] Labels
- [x] Machines
- [ ] Paper
- [ ] Phones
- [ ] Storage
- [x] Supplies
- [ ] Tables

Pivoting

(Exercise 2a)

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales
Aaron Bergman	1	$ 342
Aaron Bergman	2	$ 222
Aaron Bergman	3	$ 13
Aaron Bergman	4	$ 243
Aaron Bergman	5	$ 18
Aaron Bergman	6	$ 49

What is the gap between Customers' 1st and 2nd highest sale value?

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Customer Name	Row ID	Sales
Aaron Bergman	1	$ 342
Aaron Bergman	2	$ 222
Aaron Bergman	3	$ 13
Aaron Bergman	4	$ 243
Aaron Bergman	5	$ 18
Aaron Bergman	6	$ 49

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales
Aaron Bergman	1	$ 342
Aaron Bergman	2	$ 222
Aaron Bergman	3	$ 13
Aaron Bergman	4	$ 243
Aaron Bergman	5	$ 18
Aaron Bergman	6	$ 49

Table Calculation: RANK()

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales
Aaron Bergman	1	$ 342
Aaron Bergman	2	$ 222
Aaron Bergman	3	$ 13
Aaron Bergman	4	$ 243
Aaron Bergman	5	$ 18
Aaron Bergman	6	$ 49

1st	2nd
342	243

Columnar Calculation:
1st - 2nd = 99

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales
Aaron Bergman	1	$ 342
Aaron Bergman	2	$ 222
Aaron Bergman	3	$ 13
Aaron Bergman	4	$ 243
Aaron Bergman	5	$ 18
Aaron Bergman	6	$ 49

Calculation 1

```
{ FIXED [Customer Name] : MAX([Sales])}
```

Customer Name	Max Sale Amount
Aaron Bergman	342

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales	1st
Aaron Bergman	1	$ 342	342
Aaron Bergman	2	$ 222	342
Aaron Bergman	3	$ 13	342
Aaron Bergman	4	$ 243	342
Aaron Bergman	5	$ 18	342
Aaron Bergman	6	$ 49	342

```
{ FIXED [Customer Name] : MAX([Sales])}
```

Customer Name	Max Sale Amount
Aaron Bergman	342

What is the gap between Customers' 1st and 2nd highest sale value?

TABLEAU CONFERENCE

Customer Name	Row ID	Sales	1st
Aaron Bergman	1	$ 342	342
Aaron Bergman	2	$ 222	342
Aaron Bergman	3	$ 13	342
Aaron Bergman	4	$ 243	342
Aaron Bergman	5	$ 18	342
Aaron Bergman	6	$ 49	342

Calculation 2

Customer Name	Max Sale Amount
Aaron Bergman	342

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales	1st
~~Aaron Bergman~~	~~1~~	~~$ 342~~	~~342~~
Aaron Bergman	2	$ 222	342
Aaron Bergman	3	$ 13	342
Aaron Bergman	4	$ 243	342
Aaron Bergman	5	$ 18	342
Aaron Bergman	6	$ 49	342

```
IF [Sales] < [Max Sales Amount] THEN [Sales] END
```

Customer Name	Max Sale Amount
Aaron Bergman	342

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales	1st
~~Aaron Bergman~~	~~1~~	~~$ 342~~	~~342~~
Aaron Bergman	2	$ 222	342
Aaron Bergman	3	$ 13	342
Aaron Bergman	4	$ 243	342
Aaron Bergman	5	$ 18	342
Aaron Bergman	6	$ 49	342

```
MAX(IF [Sales] < [Max Sales Amount] THEN [Sales] END)
```

Customer Name	Max Sale Amount
Aaron Bergman	342

What is the gap between Customers' 1st and 2nd highest sale value?

Customer Name	Row ID	Sales	1st
~~Aaron Bergman~~	~~1~~	~~$ 342~~	~~342~~
Aaron Bergman	2	$ 222	342
Aaron Bergman	3	$ 13	342
Aaron Bergman	4	$ 243	342
Aaron Bergman	5	$ 18	342
Aaron Bergman	6	$ 49	342

```
{ FIXED [Customer Name] :
MAX(IF [Sales] < [Max Sales Amount] THEN [Sales] END) }
```

Customer Name	Max Sale Amount	Max Sale Amount (2nd)
Aaron Bergman	342	243

What is the gap between Customers' 1st and 2nd highest sale value?

TABLEAU CONFERENCE

Customer Name	Row ID	Sales	1st	2nd
Aaron Bergman	1	$ 342	342	243
Aaron Bergman	2	$ 222	342	243
Aaron Bergman	3	$ 13	342	243
Aaron Bergman	4	$ 243	342	243
Aaron Bergman	5	$ 18	342	243
Aaron Bergman	6	$ 49	342	243

Customer Name	Max Sale Amount	Max Sale Amount (2nd)
Aaron Bergman	342	243

Pivoting

(Challenge 2b)

2b - Challenge Find the average number of days between purchases for each Customer

Pivot, Isolate, Propagate

(Exercise 3a)

In which City did each Customer spend the most in one Sale?

Customer Name	City	Row ID	Sales
Aaron Bergman	Seattle	1	$ 342
Aaron Bergman	Dallas	2	$ 222
Aaron Bergman	Austin	3	$ 13
Aaron Bergman	New Orleans	4	$ 243
Aaron Bergman	San Francisco	5	$ 18
Aaron Bergman	Chicago	6	$ 49

In which City did each Customer spend the most in one Sale?

Customer Name	City	Row ID	Sales	pivot
Aaron Bergman	Seattle	1	$ 342	342
Aaron Bergman	Dallas	2	$ 222	342
Aaron Bergman	Austin	3	$ 13	342
Aaron Bergman	New Orleans	4	$ 243	342
Aaron Bergman	San Francisco	5	$ 18	342
Aaron Bergman	Chicago	6	$ 49	342

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

In which City did each Customer spend the most in one Sale?

Customer Name	City	Row ID	Sales	pivot
Aaron Bergman	Seattle	1	$ 342	342
Aaron Bergman	Dallas	2	$ 222	342
Aaron Bergman	Austin	3	$ 13	342
Aaron Bergman	New Orleans	4	$ 243	342
Aaron Bergman	San Francisco	5	$ 18	342
Aaron Bergman	Chicago	6	$ 49	342

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

```
(IF [Sales] = [Max Sales Amount] THEN [City] END)
```

In which City did each Customer spend the most in one Sale?

Customer Name	City	Row ID	Sales	pivot	isolate
Aaron Bergman	Seattle	1	$ 342	342	Seattle
Aaron Bergman	Dallas	2	$ 222	342	null
Aaron Bergman	Austin	3	$ 13	342	null
Aaron Bergman	New Orleans	4	$ 243	342	null
Aaron Bergman	San Francisco	5	$ 18	342	null
Aaron Bergman	Chicago	6	$ 49	342	null

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

```
(IF [Sales] = [Max Sales Amount] THEN [City] END)
```

In which City did each Customer spend the most in one Sale?

Customer Name	City	Row ID	Sales	pivot	isolate
Aaron Bergman	Seattle	1	$ 342	342	Seattle
Aaron Bergman	Dallas	2	$ 222	342	null
Aaron Bergman	Austin	3	$ 13	342	null
Aaron Bergman	New Orleans	4	$ 243	342	null
Aaron Bergman	San Francisco	5	$ 18	342	null
Aaron Bergman	Chicago	6	$ 49	342	null

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

```
MAX(IF [Sales] = [Max Sales Amount] THEN [City] END)
```

In which City did each Customer spend the most in one Sale?

Customer Name	City	Row ID	Sales	pivot	isolate	propogate
Aaron Bergman	Seattle	1	$ 342	342	Seattle	Seattle
Aaron Bergman	Dallas	2	$ 222	342	null	Seattle
Aaron Bergman	Austin	3	$ 13	342	null	Seattle
Aaron Bergman	New Orleans	4	$ 243	342	null	Seattle
Aaron Bergman	San Francisco	5	$ 18	342	null	Seattle
Aaron Bergman	Chicago	6	$ 49	342	null	Seattle

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

```
{ FIXED [Customer Name] :
    MAX(IF [Sales] = [Max Sales Amount] THEN [City] END) }
```

Pivot, Isolate, Propagate

(Challenge 3b)

3b - Challenge View Sales by State on a Filled Map. Label each State with the City that has the highest Sales in that State.

Jedi Challenge Time!

Cast your Vote!

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Which Jedi Challenge should we work through together?

Cast your Vote!

TABLEAU CONFERENCE

Surveys & Sets

Cast your Vote!

TABLEAU CONFERENCE

Conditional Formatting Pivot

		Central				East				South				West			
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class
Furniture	Discount	20	8	31	84	16	7	19	51	6	2	6	26	17	5	18	54
	Profit	-661	-207	-1,581	-422	1,566	98	71	1,311	1,173	98	1,592	3,909	990	808	4,144	5,563
	Quantity	263	103	343	1,118	383	130	433	1,268	173	45	273	800	419	175	520	1,582
	Sales	21,038	8,842	31,187	102,730	29,411	12,853	44,036	121,992	20,263	2,926	26,910	67,199	40,019	14,528	54,156	143,910
Office Supplies	Discount	52	16	59	233	48	14	37	146	23	7	26	111	32	10	28	108
	Profit	930	406	6,100	1,443	6,927	2,047	6,333	25,707	2,707	1,195	3,137	12,947	7,836	2,775	11,498	30,501
	Quantity	665	235	1,063	3,446	1,105	332	1,249	3,776	507	208	798	2,287	1,095	372	1,370	4,398
	Sales	19,390	5,819	34,307	107,510	36,483	9,125	43,205	116,703	16,824	4,289	30,598	73,940	28,635	9,858	52,573	129,788
Technology	Discount	8	3	15	30	13	5	14	45	5	3	5	20	15	4	14	47
	Profit	3,438	1,333	4,595	24,331	7,239	5,835	4,384	30,005	3,012	-3,055	9,939	10,096	13,813	4,559	7,235	18,697

Cast your Vote!

TABLEAU CONFERENCE

Top Sales Reps

Benchmark Year (BY)

2020

Sales Representative	Sales	Winning Amount	Winner Comparison Rate
Sean Miller	$25,043	$23,661	100%
Peter Fuller	$9,063	$9,022	38%
Tamara Chand	$19,052	$18,344	78%
Raymond Buch	$15,117	$14,203	60%
Patrick O'Donnell	$2,493	$467	2%

Surveys & Sets

(Jedi Challenge 1C)

TABLEAU CONFERENCE

View the % of Respondents who answered each *Question* with an *Answer* Selected

TABLEAU CONFERENCE

View the % of Respondents who answered each *Question* with an *Answer* Selected

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TABLEAU CONFERENCE

View the % of Respondents who answered each *Question* with an *Answer* Selected

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent’s Selected Answers

=

# of Overall Questions Selected

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

of Respondent’s Selected Answers

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent's Selected ~~Answers~~ Question/Answer's

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent's Selected ~~Answers~~ Question/Answer's

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

of Respondent's Selected ~~Answers~~ Question/Answer's

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

of Respondent's Selected ~~Answers~~ Question/Answer's

Q&A

4C - Grammar Survey

```
[Question]+": "+[Answers]
```

The calculation is valid.

Edit Set [Selected Q&A]

Name: Selected Q&A

General | Condition | Top

Select from list | Custom value list | Use all

Enter search text

- Null
- Age: 18-29
- Age: 30-44
- Age: 45-60
- Age: > 60

# of Selected Q&A's

4C - Grammar Survey

```
COUNTD(IF [Selected Q&A]
THEN [Question]
END)
```

The calculation is valid. 3 Dependencies Apply OK

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

of Overall Questions Selected

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent’s Selected Question/Answer’s

=

# of Overall Questions Selected

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent's Selected Question/Answer's

=

# of Overall Questions Selected

Respondents w/ All Selections | Jedi Challenge (1C) - Grammar Survey

```
{ FIXED [Respondent ID] : SUM([# of Selected Q's])=
[# of Selected Q&A's] }
```

The calculation is valid.

Apply | OK

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent's Selected Question/Answer's

=

# of Overall Questions Selected

Respondents w/ All Selections | Jedi Challenge (1C) - Grammar Survey

```
{ FIXED [Respondent ID] : SUM([# of Selected Q's])=
[# of Selected Q&A's] }
```

The calculation is valid.

Apply | OK

OR

Jedi Challenge 1c - Walkthrough

TABLEAU CONFERENCE

# of Respondent's Selected Question/Answer's

=

# of Overall Questions Selected

Respondents w/ All Selections | Jedi Challenge (1C) - Grammar Survey

```
{ FIXED [Respondent ID] : SUM([# of Selected Q's])=
[# of Selected Q&A's] }
```

The calculation is valid.

Apply | OK

OR

Edit Set [Conditional Respondents]

Name: Conditional Respondents

General | Condition | Top

- None
- By field:

Respondent ID | Count (Distinct)

= | 0

Range of Values

Min: | Load

Max:

- By formula:

```
[# of Selected Q&A's]=
SUM([# of Overall Questions Selected])
```

Conditional Formatting Pivot

(Jedi Challenge 2c)

		Central				East				South				West			
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class
Furniture	Discount	20	8	31	84	16	7	19	51	6	2	6	26	17	5	18	54
	Profit	-661	-207	-1,581	-422	1,566	98	71	1,311	1,173	98	1,592	3,909	990	808	4,144	5,563
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Technology	Discount	8	3	15	30	13	5	14	45	5	3	5	20	15	4	14	47
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	Quantity	228	54	389	873	317	111	344	1,170	150	71	223	674	388	124	418	1,405
	Sales	18,319	5,754	38,056	108,287	47,693	21,349	29,304	166,627	12,245	13,802	36,250	86,474	61,108	19,218	38,611	133,055

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

USE THESE

NOT THESE

Category	Field Names	Central					
		First Class	Same Day	Second Class	Standard Class	First Class	Same Da
Furniture	Discount	20	8	31	84	16	7
	Profit	-661	-207	-1,581	-422	1,566	98
	Quantity	263	103	343	1,118	383	130
	Sales	21,038	8,842	31,187	102,730	29,411	12,853

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

		Central				East				South				West			
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class
Furniture	Discount	20	8	31	84	16	7	19	51	6	2	6	26	17	5	18	54
	Profit	-661	-207	-1,581	-422	1,566	98	71	1,311	1,173	98	1,592	3,909	990	808	4,144	5,563
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	Quantity	228	54	389	873	317	111	344	1,170	150	71	223	674	388	124	418	1,405
	Sales	18,319	5,754	38,056	108,287	47,693	21,349	29,304	166,627	12,245	13,802	36,250	86,474	61,108	19,218	38,611	133,055

If the Ship Mode is Same Day or Standard Class, then…

- **If the Measure Value is positive, color green.**
- **If the Measure Value is negative, color red.**

If the Ship Mode is First Class or Second Class, then ignore.

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

Conditional Formatting

Superstore

```
IF ATTR([Ship Mode]) = 'Same Day'
OR ATTR([Ship Mode]) = 'Standard Class' THEN
    IF SUM([Discount]) > 0 OR SUM([Profit]) > 0 OR SUM([Quantity]) > 0 OR SUM([Sales]) > 0 THEN 'Green'
    ELSEIF SUM([Discount]) < 0 OR SUM([Profit]) < 0 OR SUM([Quantity]) < 0 OR SUM([Sales]) < 0 THEN 'Red'
    ELSE 'Black'
    END
ELSE 'Black'
END
```

The calculation is valid.

1 Dependency

Apply

OK

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

100 rows

Abc Orders Category	Abc Orders Sub-Category	Abc Orders Product Name	# Orders Sales	# Orders Quantity	# Orders Discount	# Orders Profit		Abc Calculation Sales Representative
Furniture	Bookcases	Bush Somerset Collection Bo...	261.96	2	0.000000	41.91		Claire Gute
Furniture	Chairs	Hon Deluxe Fabric Upholstere...	731.94	3	0.000000	219.58		Claire Gute
Office Supplies	Labels	Self-Adhesive Address Labels ...	14.62	2	0.000000	6.87		Darrin Van Huff
Furniture	Tables	Bretford CR4500 Series Slim ...	957.58	5	0.450000	-383.03		Sean O'Donnell
Office Supplies	Storage	Eldon Fold 'N Roll Cart System	22.37	2	0.200000	2.52	SO-20335	Sean O'Donnell
Furniture	Furnishings	Eldon Expressions Wood and ...	48.86	7	0.000000	14.17	BH-11710	Brosina Hoffman
Office Supplies	Art	Newell 322	7.28	4	0.000000	1.97	BH-11710	Brosina Hoffman
Technology	Phones	Mitel 5320 IP Phone VoIP phone	907.15	6	0.200000	90.72	BH-11710	Brosina Hoffman
Office Supplies	Binders	DXL Angle-View Binders with L...	18.50	3	0.200000	5.78	BH-11710	Brosina Hoffman

Rename
Copy Values
Hide
Create Calculated Field...
Pivot
Merge Mismatched Fields

allenge | 2a-Exercise | 2b-Challenge | 2c-Jedi Explanation | 2c-Jedi Challenge | 3a-Exercise | 3b-Challenge | 3c-Jedi Explanation | 3c-Jedi Challenge

Casey O'Donnell

WORKS, BUT REQUIRES TRANSFORMING YOUR WHOLE DATASET FOR ONE WORKSHEET…

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

		Central					
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Da
Furniture	Discount	20	8	31	84	16	7
	Profit	-661	-207	-1,581	-422	1,566	98
	Quantity	263	103	343	1,118	383	130
	Sales	21,038	8,842	31,187	102,730	29,411	12,853

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

Field Names

Superstore

```
IF DATEPART('weekday', [Order Date]) = 1 THEN 'Discount'
ELSEIF DATEPART('weekday', [Order Date]) = 2 THEN 'Profit'
ELSEIF DATEPART('weekday', [Order Date]) = 3 THEN 'Quantity'
ELSEIF DATEPART('weekday', [Order Date]) = 4 THEN 'Sales'
END
```

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

		Region / Ship Mode															
		Central				East				South				West			
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class
Furniture	Null	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Discount	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Profit	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Quantity	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc		Abc	Abc	Abc	Abc	Abc	Abc
	Sales	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc		Abc	Abc	Abc	Abc	Abc	Abc
Office Supplies	Null	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Discount	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Profit	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Quantity	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Sales	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
Technology	Null	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Discount	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Profit	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Quantity	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc
	Sales	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc	Abc

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

Field Values

Superstore

```
IF [Field Names] = 'Discount' THEN {FIXED [Category], [Region], [Ship Mode] : SUM([Discount])}
ELSEIF [Field Names] = 'Profit' THEN {FIXED [Category], [Region], [Ship Mode] : SUM([Profit])}
ELSEIF [Field Names] = 'Quantity' THEN {FIXED [Category], [Region], [Ship Mode] : SUM([Quantity])}
ELSEIF [Field Names] = 'Sales' THEN {FIXED [Category], [Region], [Ship Mode] : SUM([Sales])}
END
```

The calculation is valid.

Apply

OK

NO LOD

Discount = Weekday of 1, Filter the discount data to Sunday.

LOD

Ignore everything that's not Category, Region, Ship Mode* when you calculate Discount.

*or a context filter

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

		Region / Ship Mode															
		Central				East				South				West			
Category	Field Names	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class	First Class	Same Day	Second Class	Standard Class
Furniture	Discount	20	8	31	84	16	7	19	51	6	2	6	26	17	5	18	54
	Profit	-661	-207	-1,581	-422	1,566	98	71	1,311	1,173	98	1,592	3,909	990	808	4,144	5,563
	Quantity	263	103	343	1,118	383	130	433	1,268	173	45	273	800	419	175	520	1,582
	Sales	21,038	8,842	31,187	102,730	29,411	12,853	44,036	121,992	20,263	2,926	26,910	67,199	40,019	14,528	54,156	143,910
Office Supplies	Discount	52	16	59	233	48	14	37	146	23	7	26	111	32	10	28	108
	Profit	930	406	6,100	1,443	6,927	2,047	6,333	25,707	2,707	1,195	3,137	12,947	7,836	2,775	11,498	30,501
	Quantity	665	235	1,063	3,446	1,105	332	1,249	3,776	507	208	798	2,287	1,095	372	1,370	4,398
	Sales	19,390	5,819	34,307	107,510	36,483	9,125	43,205	116,703	16,824	4,289	30,598	73,940	28,635	9,858	52,573	129,788
Technology	Discount	8	3	15	30	13	5	14	45	5	3	5	20	15	4	14	47
	Profit	3,438	1,333	4,595	24,331	7,239	5,835	4,384	30,005	3,012	-3,055	9,939	10,096	13,813	4,559	7,235	18,697
	Quantity	228	54	389	873	317	111	344	1,170	150	71	223	674	388	124	418	1,405
	Sales	18,319	5,754	38,056	108,287	47,693	21,349	29,304	166,627	12,245	13,802	36,250	86,474	61,108	19,218	38,611	133,055

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

Conditional Formatting

Superstore

```
IF ATTR([Ship Mode]) = 'Same Day' OR ATTR([Ship Mode]) = 'Standard Class' THEN
    IF MAX([Field Values]) > 0 THEN 'Green'
    ELSEIF MAX([Field Values]) < 0 THEN 'Red'
    ELSE 'Black'
    END
ELSE 'Black'
END
```

If the Ship Mode is Same Day or Standard Class, then…

- If the Measure Value is positive, color green.
- If the Measure Value is negative, color red.

If the Ship Mode is First Class or Second Class, then ignore.

Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

		Central				East				South				West			
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Furniture	Discount	20	8	31	84	16	7	19	51	6	2	6	26	17	5	18	54
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	Quantity	228	54	389	873	317	111	344	1,170	150	71	223	674	388	124	418	1,405
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Jedi Challenge 2C- Walkthrough

TABLEAU CONFERENCE

Top Sales Reps

(Jedi Challenge 3c)

TABLEAU CONFERENCE

Benchmark Year (BY)

2020

3c - Jedi Challenge

Filter to the Sales Reps who were the Top Seller for any single year.
Display their total Sales for all time.
Display their total sales for the year they were the top seller.
Display their total sales for the year they were a top seller as a % of the top seller amount for a selected Benchmark Year

Sales Representative	Sales	Winning Amount	Winner Comparison Rate
Sean Miller	$25,043	$23,661	100%
Peter Fuller	$9,063	$9,022	38%
Tamara Chand	$19,052	$18,344	78%
Raymond Buch	$15,117	$14,203	60%
Patrick O'Donnell	$2,493	$467	2%

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

“Annual Rep Sales”: Annual Sales per Sales Representative

Sales Representative	Order Date	Year of Order Date	Sales
Sean Miller	1/25/2020	2020	$821
Sean Miller	3/1/2020	2020	$22,638
Sean Miller	4/15/2020	2020	$31
Sean Miller	5/26/2020	2020	$122
Sean Miller	7/15/2020	2020	$21
Sean Miller	9/30/2020	2020	$8
Sean Miller	12/18/2020	2020	$19
Sean Miller	1/14/2021	2021	$10
Sean Miller	2/27/2021	2021	$22
Sean Miller	4/3/2021	2021	$3
Sean Miller	7/23/2021	2021	$663
Sean Miller	9/2/2021	2021	$100
Sean Miller	11/24/2021	2021	$50

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

“Annual Rep Sales”: Annual Sales per Sales Representative

```
{ FIXED YEAR([Order Date]), [Sales Representative ID] : SUM([Sales])}
```

Sales Representative	Order Date	Year of Order Date	Sales	pivot
Sean Miller	1/25/2020	2020	$821	$23,661
Sean Miller	3/1/2020	2020	$22,638	$23,661
Sean Miller	4/15/2020	2020	$31	$23,661
Sean Miller	5/26/2020	2020	$122	$23,661
Sean Miller	7/15/2020	2020	$21	$23,661
Sean Miller	9/30/2020	2020	$8	$23,661
Sean Miller	12/18/2020	2020	$19	$23,661
Sean Miller	1/14/2021	2021	$10	$847
Sean Miller	2/27/2021	2021	$22	$847
Sean Miller	4/3/2021	2021	$3	$847
Sean Miller	7/23/2021	2021	$663	$847
Sean Miller	9/2/2021	2021	$100	$847
Sean Miller	11/24/2021	2021	$50	$847

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

“Annual Rep Sales”: Annual Sales per Sales Representative

```
{ FIXED YEAR([Order Date]), [Sales Representative ID] : SUM([Sales])}
```

Sales Representative	Year of Order Date	Annual Rep Sales
Sean Miller	2020	$23,661
Sean Miller	2021	$847
Peter Fuller	2020	$41
Peter Fuller	2021	$9,022
Tamara Chand	2020	$622
Tamara Chand	2021	$85
Tamara Chand	2022	$18,344

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Rep Annual Amount": Top Annual Sales per year across all reps

Sales Representative	Year of Order Date	Annual Rep Sales
Sean Miller	2020	$23,661
Sean Miller	2021	$847
Peter Fuller	2020	$41
Peter Fuller	2021	$9,022
Tamara Chand	2020	$622
Tamara Chand	2021	$85
Tamara Chand	2022	$18,344

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Rep Annual Amount": Top Annual Sales per year across all reps

```
{ FIXED YEAR([Order Date]) : MAX([Annual Rep Sales])}
```

Sales Representative	Year of Order Date	Annual Rep Sales	pivot
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Annual Rep Filter": was a given rep ever the top annual seller? T/F

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Annual Rep Filter": was a given rep ever the top annual seller? T/F

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Annual Rep Filter": was a given rep ever the top annual seller? T/F

```
[Annual Rep Sales] = [Top Rep Annual Amount]
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	isolate
Sean Miller	2020	$23,661	$23,661	T
Sean Miller	2021	$847	$9,022	F
Peter Fuller	2020	$41	$23,661	F
Peter Fuller	2021	$9,022	$9,022	T
Tamara Chand	2020	$622	$23,661	F
Tamara Chand	2021	$85	$9,022	F
Tamara Chand	2022	$18,344	$18,344	T

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Annual Rep Filter": was a given rep ever the top annual seller? T/F

```
{ FIXED [Sales Representative ID] : MAX([Annual Rep Sales] = [Top Rep Annual Amount])}
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	isolate	propagate
Sean Miller	2020	$23,661	$23,661	T	T
Sean Miller	2021	$847	$9,022	F	T
Peter Fuller	2020	$41	$23,661	F	T
Peter Fuller	2021	$9,022	$9,022	T	T
Tamara Chand	2020	$622	$23,661	F	T
Tamara Chand	2021	$85	$9,022	F	T
Tamara Chand	2022	$18,344	$18,344	T	T

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Top Annual Rep Filter": was a given rep ever the top annual seller? T/F

```
{ FIXED [Sales Representative ID] : MAX([Annual Rep Sales] = [Top Rep Annual Amount])}
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	Top Annual Rep Filter
Sean Miller	2020	$23,661	$23,661	T
Sean Miller	2021	$847	$9,022	T
Peter Fuller	2020	$41	$23,661	T
Peter Fuller				T
Tamara Chand				T
Tamara Chand				T
Tamara Chand				T

Step 1: Pivot

Step 2: Isolate

Step 3: Propagat

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winning Amount": total sales for the year a rep was top seller

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winning Amount": total sales for the year a rep was top seller

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winning Amount": total sales for the year a rep was top seller

```
IF [Annual Rep Sales] = [Top Rep Annual Amount] THEN [Annual Rep Sales] END
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	isolate
Sean Miller	2020	$23,661	$23,661	$23,661
Sean Miller	2021	$847	$9,022	null
Peter Fuller	2020	$41	$23,661	null
Peter Fuller	2021	$9,022	$9,022	$9,022
Tamara Chand	2020	$622	$23,661	null
Tamara Chand	2021	$85	$9,022	null
Tamara Chand	2022	$18,344	$18,344	$18,344

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winning Amount": total sales for the year a rep was top seller

```
{ FIXED [Sales Representative ID]:
MAX(IF [Annual Rep Sales] = [Top Rep Annual Amount] THEN [Annual Rep Sales] END)}
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	isolate	propagate
Sean Miller	2020	$23,661	$23,661	$23,661	$23,661
Sean Miller	2021	$847	$9,022	null	$23,661
Peter Fuller	2020	$41	$23,661	null	$9,022
Peter Fuller	2021	$9,022	$9,022	$9,022	$9,022
Tamara Chand	2020	$622	$23,661	null	$18,344
Tamara Chand	2021	$85	$9,022	null	$18,344
Tamara Chand	2022	$18,344	$18,344	$18,344	$18,344

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"BY - Winner Sales Amount": winning sales rep's sales for selected year

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"BY - Winner Sales Amount": winning sales rep's sales for selected year

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount
Sean Miller	2020	$23,661	$23,661
Sean Miller	2021	$847	$9,022
Peter Fuller	2020	$41	$23,661
Peter Fuller	2021	$9,022	$9,022
Tamara Chand	2020	$622	$23,661
Tamara Chand	2021	$85	$9,022
Tamara Chand	2022	$18,344	$18,344

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"BY - Winner Sales Amount": winning sales rep's sales for selected year

```
IF YEAR([Order Date])=[Benchmark Year (BY)] THEN [Top Rep Annual Amount] END
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	isolate
Sean Miller	2020	$23,661	$23,661	$23,661
Sean Miller	2021	$847	$9,022	null
Peter Fuller	2020	$41	$23,661	$23,661
Peter Fuller	2021	$9,022	$9,022	null
Tamara Chand	2020	$622	$23,661	$23,661
Tamara Chand	2021	$85	$9,022	null
Tamara Chand	2022	$18,344	$18,344	null

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"BY - Winner Sales Amount": winning sales rep's sales for selected year

```
{MAX(IF YEAR([Order Date])=[Benchmark Year (BY)] THEN [Top Rep Annual Amount] END)}
```

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	isolate	propagate
Sean Miller	2020	$23,661	$23,661	$23,661	$23,661
Sean Miller	2021	$847	$9,022	null	$23,661
Peter Fuller	2020	$41	$23,661	$23,661	$23,661
Peter Fuller	2021	$9,022	$9,022	null	$23,661
Tamara Chand	2020	$622	$23,661	$23,661	$23,661
Tamara Chand	2021	$85	$9,022	null	$23,661
Tamara Chand	2022	$18,344	$18,344	null	$23,661

Step 1: Pivot

Step 2: Isolate

Step 3: Propagate (cohort)

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winner Comparison Rate": sales for the year a rep was top seller as % of sales for the top seller in selected year

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	Winning Amount	BY - Winner Sales Amount
Sean Miller	2020	$23,661	$23,661	$23,661	$23,661
Sean Miller	2021	$847	$9,022	$23,661	$23,661
Peter Fuller	2020	$41	$23,661	$9,022	$23,661
Peter Fuller	2021	$9,022	$9,022	$9,022	$23,661
Tamara Chand	2020	$622	$23,661	$18,344	$23,661
Tamara Chand	2021	$85	$9,022	$18,344	$23,661
Tamara Chand	2022	$18,344	$18,344	$18,344	$23,661

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winner Comparison Rate": sales for the year a rep was top seller as % of sales for the top seller in selected year

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	Winning Amount	BY - Winner Sales Amount
Sean Miller	2020	$23,661	$23,661	$23,661	$23,661
Sean Miller	2021	$847	$9,022	$23,661	$23,661
Peter Fuller	2020	$41	$23,661	$9,022	$23,661
Peter Fuller	2021	$9,022	$9,022	$9,022	$23,661
Tamara Chand	2020	$622	$23,661	$18,344	$23,661
Tamara Chand	2021	$85	$9,022	$18,344	$23,661
Tamara Chand	2022	$18,344	$18,344	$18,344	$23,661

Jedi Challenge 3c - Walkthrough

TABLEAU CONFERENCE

"Winner Comparison Rate": sales for the year a rep was top seller as % of sales for the top seller in selected year

Sales Representative	Year of Order Date	Annual Rep Sales	Top Rep Annual Amount	Winning Amount	BY - Winner Sales Amount	
Sean Miller	2020	$23,661	$23,661	$23,661	$23,661	100%
Sean Miller	2021	$847	$9,022	$23,661	$23,661	100%
Peter Fuller	2020	$41	$23,661	$9,022	$23,661	38%
Peter Fuller	2021	$9,022	$9,022	$9,022	$23,661	38%
Tamara Chand	2020	$622	$23,661	$18,344	$23,661	78%
Tamara Chand	2021	$85	$9,022	$18,344	$23,661	78%
Tamara Chand	2022	$18,344	$18,344	$18,344	$23,661	78%

TABLEAU CONFERENCE

Thank you

TABLEAU CONFERENCE