



2023 Week 01 | Simple Recipe – Line Item Sales

[20 Comments](#) / [CRM Analytics](#) / By [Alex Waleczek](#)

Introduction

Hello and welcome in 2023! If you are here, hopefully one of your new years resolutions is to practise your CRMA skills. The good thing is that it takes less effort than going to the gym and is arguably more fun as well!

From now on you can come back Wednesday each week to find a new problem with varying difficulty to solve.

We kick things off with 4 challenges that build up on each other to work on the basics of CRMA. If you don't have access to the tool or would like to start from scratch, you can sign up for a new developer org here: <https://trailhead.salesforce.com/promo/orgs/analytics-de>

This week we focus on a simple recipe to get things going.

Requirements

- Create a dev org or use an existing org you have access to
- Connect to the Opportunity, OpportunityLineItem, Product2 and Account objects
- Join all objects together
- Include only "Closed Won" opportunities for "Customer" accounts
- Calculate
 - the total list price per line item
 - the absolute discount for each line item
 - a string field with the year of the close date of the opportunity
- Aggregate
 - Quantity
 - List Price
 - Total List Price
 - Sale Price
 - Total Price
 - Absolute Discount
- Group By
 - Billing Country
 - Close Date Year
 - Product Family
 - Product Name
 - Opportunity Type
- Output the data into a dataset (we'll need it next week!)

The resulting dataset should look something like this:

Preview		Columns								
A ₁ Billing Country	A ₂ Close Date Year	A ₃ Product Family	A ₄ Product Name	A ₅ Opportunity Type	## Absolute Discount	## List Price	## Quantity	## Sales Price	## Total List Price	## Total Price
USA	2029			New Business / Add-on	0	0.00	0.00	0.00	0	0.00
USA	2029	Phones	Space phone 2	Existing Business	436275	450.00	1939.00	225.00	872550	436275.00
USA	2029	Laptops	Pro laptop	Existing Business	306600	1600.00	1533.00	1400.00	2452800	2146200.00
USA	2029	Accessories	Keyboard	Existing Business	9070	100.00	907.00	90.00	90700	81630.00
Belgium	2029	Phones	Space phone 3	New Business / Add-on	84600	550.00	1692.00	500.00	930600	846000.00
Switzerland	2029			New Business	0	0.00	0.00	0.00	0	0.00
Canada	2028			New Business / Add-on	0	0.00	0.00	0.00	0	0.00
Taiwan	2029	Laptops	Notebook	New Business / Add-on	227800	2400.00	2278.00	2200.00	2733600	2505800.00
Taiwan	2029	Accessories	Mouse	New Business / Add-on	36300	120.00	3630.00	100.00	217800	181500.00
Taiwan	2029	Tablets	Light tablet	New Business / Add-on	320800	800.00	1604.00	600.00	1283200	962400.00
Canada	2029	Accessories	Cables	New Business	40750	250.00	4075.00	200.00	203750	163000.00
India	2029	Accessories	Cables	New Business	7990	50.00	799.00	40.00	39950	31960.00
India	2029	Laptops	Notebook	New Business	117000	1200.00	1170.00	1100.00	1404000	1287000.00
Germany	2029	Laptops	Light laptop	New Business	259950	2800.00	1733.00	2500.00	2426200	2166250.00
Germany	2029	Phones	Space phone 3	New Business	187500	1650.00	3750.00	1500.00	2062500	1875000.00

I got 11 columns with 377 rows, but I don't know if Salesforce changes the default data in their orgs, so use this as a guide.

► Tipps

Dataset

This week uses the data from the standard objects that come with the CRMA Dev-Org. If this is your first challenge, you can sign up for a dev org here: <https://trailhead.salesforce.com/promo/orgs/analytics-de>

Share

After you finish your workout, share a screenshot of your solutions or interesting insights on Twitter using the hashtags #WOW2023 and #CRMA and tag @genetis, @PrenzJ, @LaGMills and @JaackParry. (Or you can use [this handy link](#) to do that)

Also make sure to fill out the [Submission Tracker](#) to track your progress and help us judge the difficulty of our challenges.

Solution

Below is a solution by [Tim Dries](#) from Biztory (thanks for that!)

The "Total List Price" was intended to be Quantity * List Price. And the data should be filtered by "Closed Won" and not only "Closed". Opportunities could be closed and lost and we don't want to include those.

Workout Wednesday (WOW2023) | Wee...



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20 thoughts on “2023 Week 01 | Simple Recipe – Line Item Sales”



[TIM DRIES](#)

[JANUARY 4, 2023 AT 8:47 AM](#)

Alright, here we go.

[Reply](#)



[TIM DRIES](#)

[JANUARY 4, 2023 AT 3:37 PM](#)

What is the difference between the “List Price” and the “Total List Price” in the the final table?

[Reply](#)



[ALEX WALECZEK](#)

[JANUARY 5, 2023 AT 12:21 AM](#)

List Price is the price for a single item. Total List Price is the total revenue if the item was sold at list price every single time.

[Reply](#)



[TINA](#)

[JANUARY 5, 2023 AT 1:38 AM](#)

Really don't know how to do it for a newbie, could you please record a video?

[Reply](#)



TIM DRIES

[JANUARY 5, 2023 AT 3:22 PM](#)

Hi all,

I have recorded my go at solving challenge number 1:

<https://youtu.be/Asirwn51jWs>

Open to corrections, suggestions and remarks

Cheers

Tim Dries

[Reply](#)



ALEX WALECZEK

[JANUARY 6, 2023 AT 1:00 AM](#)

Thanks, Tim! Looks good and I actually learned about the "Extract" button from this video.

For anybody else watching, the "Total List Price" was intended to be Quantity * List Price. And the data should be filtered by "Closed Won" and not only "Closed". Opportunities could be closed and lost and we don't want to include those.

Alex

[Reply](#)



TINA

[JANUARY 6, 2023 AT 6:03 AM](#)

Thank very much! The CRM Analytics is amazing for Chinese CRM users.

[Reply](#)



KLAUS

[JANUARY 14, 2023 AT 12:40 PM](#)

Hey Alex, I want to give CRMA a try but I'm failing at the very first step 🤔. I set up the dev org following the link, but Analytics Studio is not appearing in my apps. Any recommendations to fix that issue?

[Reply](#)



ALEX WALECZEK
[JANUARY 16, 2023 AT 8:23 AM](#)

Had a chat with Klaus and it looks like there was a problem when the dev org was provisioned. Easiest fix is probably to apply for another dev org.

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Pingback: [2023 Week 02 | Simple Discount Dashboard – Workout Wednesday](#)



ZUBAIR
[JANUARY 20, 2023 AT 10:30 AM](#)

Hi All,

I am a new in CRMA , can you please help when we issues this dataset?, can we use this data set with tableau ?please help

[Reply](#)



ALEX WALECZEK
[JANUARY 22, 2023 AT 7:14 PM](#)

It sounds like you are starting from scratch. I'd recommend getting a trailhead account and following the instructions here:

<https://trailhead.salesforce.com/content/learn/projects/quick-start-einstein-analytics/sign-up-for-an-analytics-org>

You'll need to create yourself a (free) Dev org to then do the challenges in. To solve the challenges you'll need to do them in CRMA, there is no Tableau involved.

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Pingback: [2023 Week 04 | Interactions & Custom Queries – Workout Wednesday](#)



COMBO
[FEBRUARY 8, 2023 AT 9:39 AM](#)

The solution to this challenge?

[Reply](#)



ALEX WALECZEK
[FEBRUARY 9, 2023 AT 7:22 PM](#)

I added it at the bottom of the page now.

[Reply](#)

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Pingback: [2023 Week 08 | Hidden Pages Extended – Workout Wednesday](#)



THARUN

[FEBRUARY 24, 2023 AT 6:23 PM](#)

Very helpful & do some stuff on bindings too

Thank you

[Reply](#)

Pingback: [2023 Week 12 | Recipe Scheduling – Workout Wednesday](#)

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