

PRACTICE METRICS KEY



GROW.COM

**Certified Partner
Training 2018**

Practical: Data Transforms - Metric #1



- Report: Sales Data (Salesforce)
- Data from website leads only
- Weekly ACV
- Cumulative MRR
- Key Value (spreadsheet functions)
- Match visuals and formatting



Metric #1 - Hint

> Edit Metric

Metric Title

ACV vs Cumulative MRR (YTD - Weekly)

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column B Weekly ACV Sold
- REPORT1 / Column E Cumulative MRR S

- Display Legend on Bottom
- Start Value Axis at 0
- Select series Title from data set
- Add TrendLine
- Enable 2 Value Axes

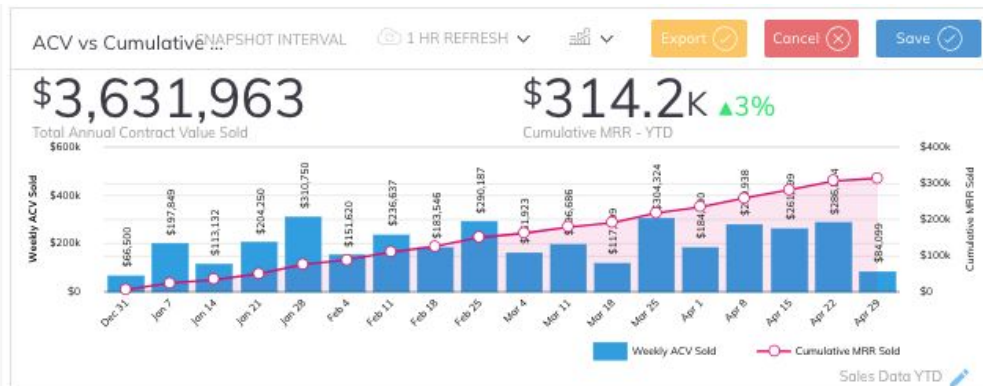
Chart Labels

Key Value

- REPORT1 / F2 Key Value
- SPREADSHEET / B2 Key Value

Add Value

Goal Line



REPORT1 x SPREADSHEET FUNCTIONS ADD NEW REPORT +

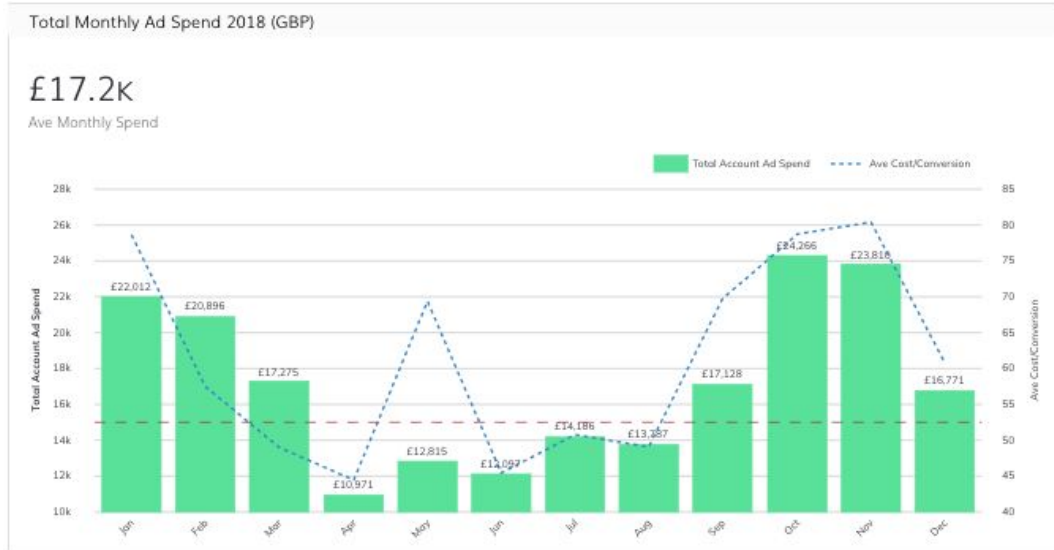
Add Transform Clear All

	B	C	D	E	F
1	Sum of ACV	Sum of MRR	Overall Cumulative Sum of Sum of ACV	Overall Cumulative Sum of Sum of MRR	Overall Sum of Sum of ACV
2	66500	6315.69	66500	6315.69	3631962.96
3	197849	17930.77	264349	24246.46	3631962.96
4	113132	9119.35	377481	33365.81	3631962.96
5	204250	16733.62	581731	50099.43	3631962.96
6	310750	25491.73	892481	75591.16	3631962.96
7	151619.96	12722.63	1044100.96	88313.79	3631962.96
8	236637	21609.35	1280737.96	109923.14	3631962.96
9	183546	15621.23	1464283.96	125544.37	3631962.96
10	290187	24588.07	1754470.96	150132.44	3631962.96
11	161923	11691.28	1916393.96	161823.72	3631962.96
12	196686	16822.25	2113079.96	178645.97	3631962.96
13	117999	12394.98	2231078.96	191040.95	3631962.96
14	304324	27115.77	2535402.96	218156.72	3631962.96
15	184600	16191.5	2720002.96	234348.22	3631962.96
16	279938	24728.4	2999940.96	259076.62	3631962.96
17	261099	23247.21	3261039.96	282323.83	3631962.96
18	286824	23562.06	3547863.96	305885.89	3631962.96

DATA PREVIEW OPTIONS



Practical: Data Transforms - Metric #2



- Report: Account Ad Performance (Adwords)
- Spend vs Cost/Conversion
- Goal Line
- Currency in GBP (£)
- Monthly Snapshot (London)
- 30 min data refresh



Metric #2 - Hints

Edit New Metric

Metric Title

Total Monthly Ad Spend 2018 (GBP)

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column B Total Account Ad S
- REPORT1 / Column C Ave Cost/Conversi

- Display Legend on Bottom
- Start Value Axis at 0
- Select series Title from data set
- Add TrendLine
- Enable 2 Value Axes

Chart Labels

REPORT1 / Column A

Rotate labels on chart

Change Date Format

Jan

Symbol or Label Input

Symbol Location

Label Size

Key Value

Goal Line

Enter value for Goal Line

Goal Line

15000

Total Monthly Ad Spend 2018 (GBP)

SPAPSHOT INTERVAL

30 MIN REFRESH

Export

Cancel

Save

£17.2k

Ave Monthly Spend



REPORT1

SPREADSHEET FUNCTIONS

ADD NEW REPORT

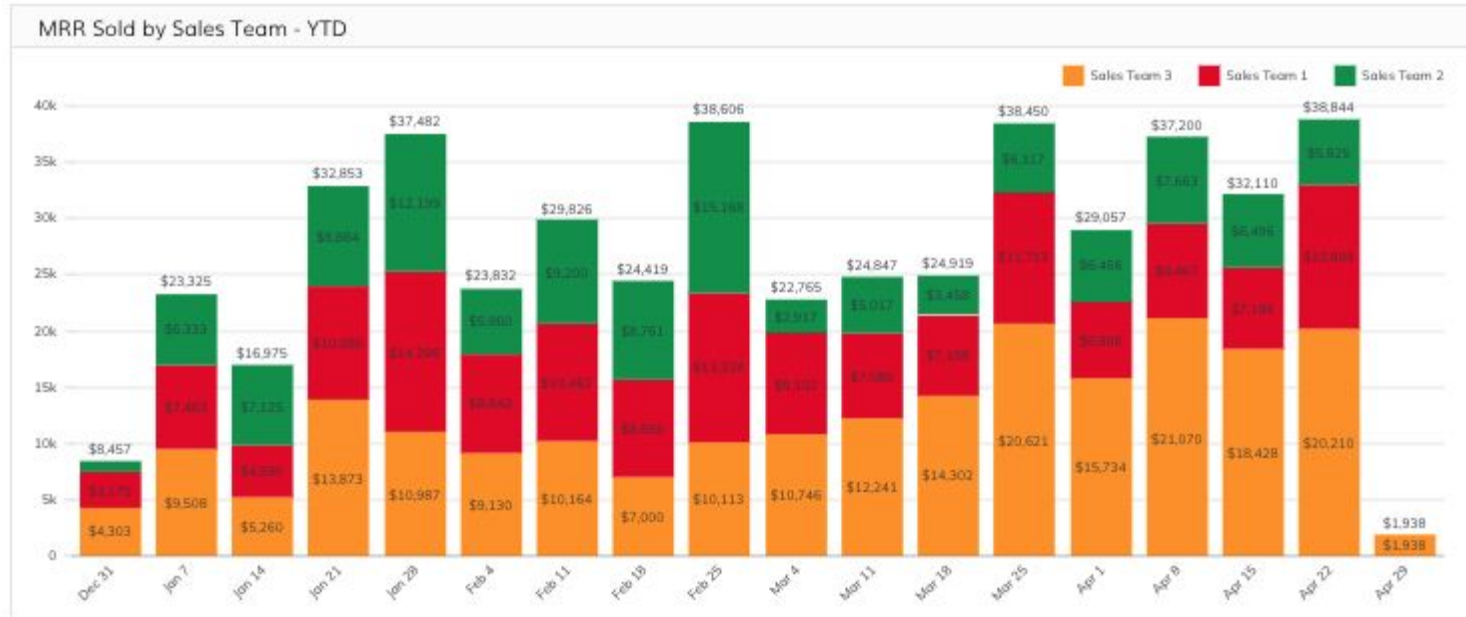
Add Transform

Clear All

	A	B	C	D
1	day	Sum of cost_adjusted	Average of cost/conv adj	Overall Average of Sum of cost_adjusted
2	2018-01	22012.35	78.65	17167.67
3	2018-02	20895.57	57.51	17167.67
4	2018-03	17274.63	49.02	17167.67
5	2018-04	10970.58	44.45	17167.67
6	2018-05	12814.58	69.38	17167.67
7	2018-06	12097.4	45.43	17167.67
8	2018-07	14185.55	50.78	17167.67
9	2018-08	13787.13	49.07	17167.67
10	2018-09	17127.58	69.71	17167.67
11	2018-10	24265.63	78.74	17167.67
12	2018-11	23809.85	80.41	17167.67
13	2018-12	16771.19	60.82	17167.67
14				
15				
16				
17				
18				
19				
20				
21				
22				
23				
24				
25				
26				
27				



Practical: Data Transforms - Metric #3



- Report: Sales Data (Salesforce)
- MRR Sales by Sales Team
- Tagging - Create three teams
- Pivot
- Select data series titles from data
- Show value labels



Metric #3 - Hints

Edit New Metric

Metric Title

MRR Sold by Sales Team - YTD

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column B Sales Team 2
- REPORT1 / Column C Sales Team 1
- REPORT1 / Column D Sales Team 2

Add Data

- Show Legend When Metric is Expanded
- Display Legend on Bottom
- Start Value Axis at 0
- Select series Title from data set

Title selection:
REPORT1 / B1 to D1

Clear title selection

- Add TrendLine
- Display Totals

Format

Currency, Rounded (\$1,235)

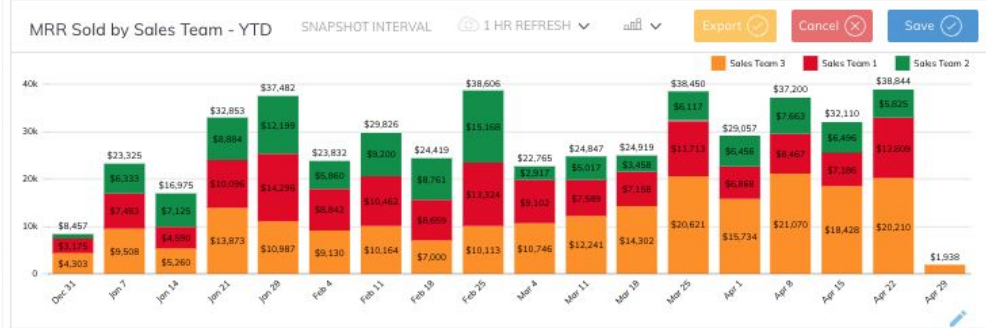
Chart Labels

REPORT1 / Column A

- Rotate labels on chart

Change Date Format

Jan 1



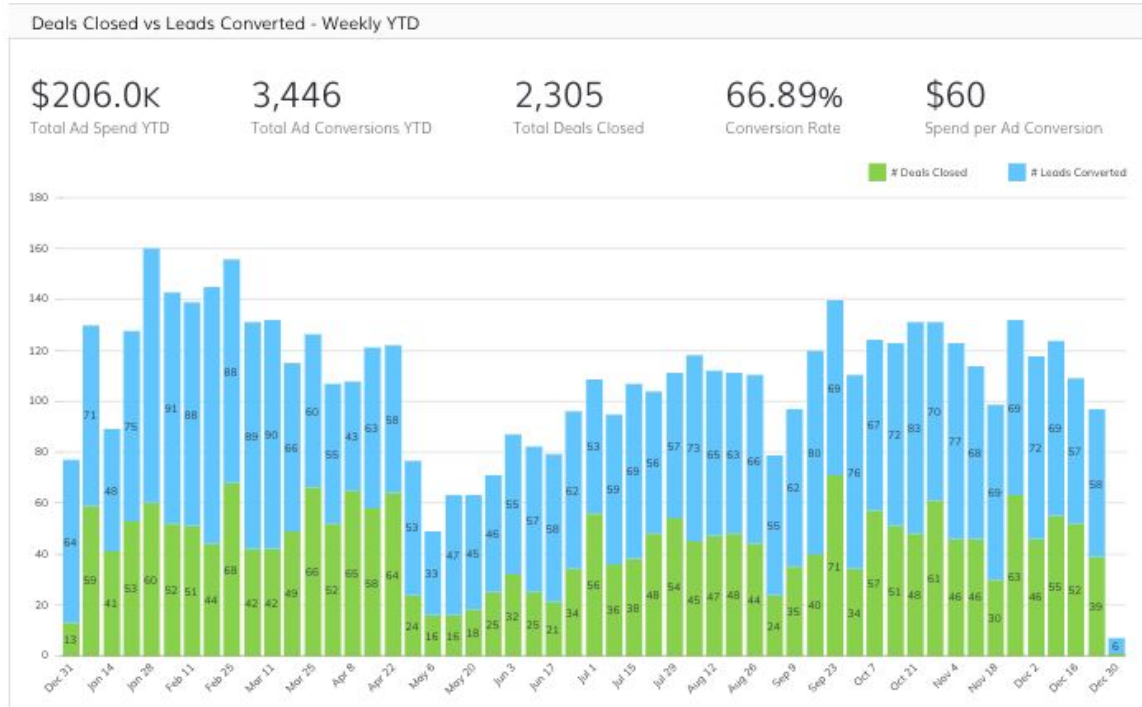
REPORT1 SPREADSHEET FUNCTIONS ADD NEW REPORT

Add Transform Clear All

	A	B	C	D
1	CloseDate	Sales Team 3	Sales Team 1	Sales Team 2
2	2017-12-31	4303.18	3175.01	979.1700000000001
3	2018-01-07	9508.03	7483.35	6333.35
4	2018-01-14	5260.2800000000001	4590.18	7125.02
5	2018-01-21	13873.4	10095.810000000001	8884.070000000002
6	2018-01-28	10987.1	14295.900000000001	12199.27
7	2018-02-04	9130.45	8841.69	5860.1
8	2018-02-11	10164.480000000001	10461.53	9200.04
9	2018-02-18	7000.040000000001	8658.69	8760.54
10	2018-02-25	10113.45	13324.03	15168.44
11	2018-03-04	10745.77	9102.34	2916.6800000000003
12	2018-03-11	12241.3	7589.290000000001	5016.6900000000005
13	2018-03-18	14302.230000000001	7158.370000000001	3458.3500000000004
14	2018-03-25	20620.689999999995	11712.570000000002	6116.68
15	2018-04-01	15733.570000000002	6867.64	6455.89
16	2018-04-08	21070.479999999996	8466.7	7662.52
17	2018-04-15	18428.449999999997	7185.870000000001	6495.860000000001
18	2018-04-22	20210.069999999992	12808.59	5825.030000000001
19	2018-04-29	1937.5100000000002		
20				
21				
22				
23				
24				
25				



Practical: Data Blends - Metric #4



- Report: Sales Data (Salesforce), Account Ad Performance (Adwords)
- Joined Report
- Deals Closed/Leads Converted
- Ad Spend Data:
 - Remove irrelevant columns
 - Rename cost adj to "Ad Spend"
- Hint: Group sales data prior to join
- Calculated Columns for key value calculations



Metric #4 - Hints

> Edit Metric

Metric Title

Deals Closed vs Leads Converted - Weekly YTD

CHART SETTINGS

JOINED REPORT SETTINGS

Metric Description

Data Series

- REPORT3 / Column D # Deals Closed
- REPORT3 / Column B # Leads Converted

Add Data

Show Legend When Metric is Expanded

Display Legend on Bottom

Start Value Axis at 0

Select series Title from data set

Add TrendLine

Display Totals

Chart Labels

Key Value

- REPORT3 / F2 Key Value
- REPORT3 / E2 Key Value
- REPORT3 / G2 Key Value
- REPORT3 / H2 Key Value
- REPORT3 / I2 Key Value

Add Value



REPORT1 x REPORT2 x REPORT3 (JOIN) x SPREADSHEET FUNCTIONS ADD NEW REPORT

Add Transform Clear All PREVIEW OPTIONS

D	E	F	G	H	I
n of Count	Overall Sum of Sum of conversions	Overall Sum of Sum of Ad Spend	Overall Sum of Sum of Count	Deal Closed Conversion rate	Spend per Conversion
1	3446	206012.04	2305	0.6688914683691236	59.7829483459083
2	3446	206012.04	2305	0.6688914683691236	59.7829483459083
3	3446	206012.04	2305	0.6688914683691236	59.7829483459083
4	3446	206012.04	2305	0.6688914683691236	59.7829483459083
5	3446	206012.04	2305	0.6688914683691236	59.7829483459083
6	3446	206012.04	2305	0.6688914683691236	59.7829483459083
7	3446	206012.04	2305	0.6688914683691236	59.7829483459083
8	3446	206012.04	2305	0.6688914683691236	59.7829483459083
9	3446	206012.04	2305	0.6688914683691236	59.7829483459083
10	3446	206012.04	2305	0.6688914683691236	59.7829483459083
11	3446	206012.04	2305	0.6688914683691236	59.7829483459083
12	3446	206012.04	2305	0.6688914683691236	59.7829483459083
13	3446	206012.04	2305	0.6688914683691236	59.7829483459083
14	3446	206012.04	2305	0.6688914683691236	59.7829483459083
15	3446	206012.04	2305	0.6688914683691236	59.7829483459083
16	3446	206012.04	2305	0.6688914683691236	59.7829483459083
17	3446	206012.04	2305	0.6688914683691236	59.7829483459083
18	3446	206012.04	2305	0.6688914683691236	59.7829483459083
19	3446	206012.04	2305	0.6688914683691236	59.7829483459083
20	3446	206012.04	2305	0.6688914683691236	59.7829483459083
21	3446	206012.04	2305	0.6688914683691236	59.7829483459083
22	3446	206012.04	2305	0.6688914683691236	59.7829483459083
23	3446	206012.04	2305	0.6688914683691236	59.7829483459083
24	3446	206012.04	2305	0.6688914683691236	59.7829483459083



Practical: Google Analytics Metric

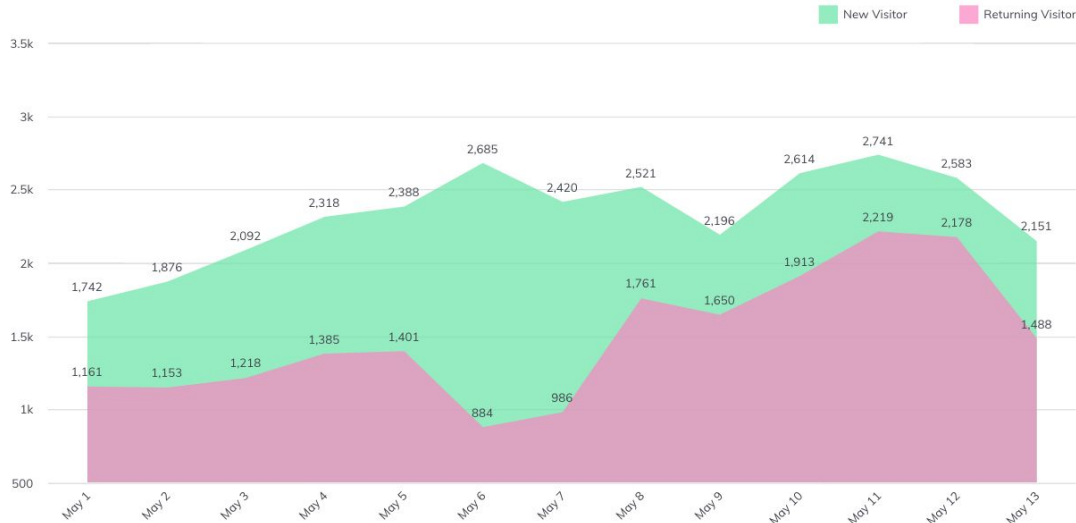
New vs Returning Visitor - MTD vs Last Month

30.3k ▲ 53%

Total New Visitors - MTD vs Last Month

19.4k ▲ 49%

Total Returning Visitors - MTD vs Last Month



- Report: Marketing Site Analytics (GA)
- Compare total daily sessions by visitor type
- Key values compared to last month, same day



GA Metric - Hint

Edit New Metric

Metric Title

New vs Returning Visitor - MTD vs Last Month

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column B New Visitor
- REPORT1 / Column C Returning Visitor

Add Data

Show Legend When Metric is Expanded

Display Legend on Bottom

Start Value Axis at 0

Select series Title from data set

Add TrendLine

Enable 2 Value Axes

Chart Labels

Key Value

Goal Line

New vs Returning Visitor - MTD vs Last Month

SNAPSHOT INTERVAL

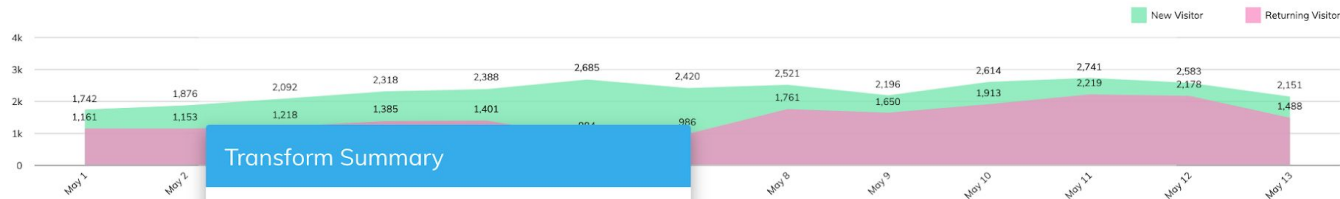
1 HR REFRESH

Cancel

Save

30.3k ▲53%

19.4k ▲49%



Transform Summary

Where
Filter ga:date

Pivot
Pivot row Ga:date, column Ga:userType, value Ga:sessions, and Sum

Sum, Count, Avg, Min, Max
Sum of New Visitor
Sum of Returning Visitor

Done

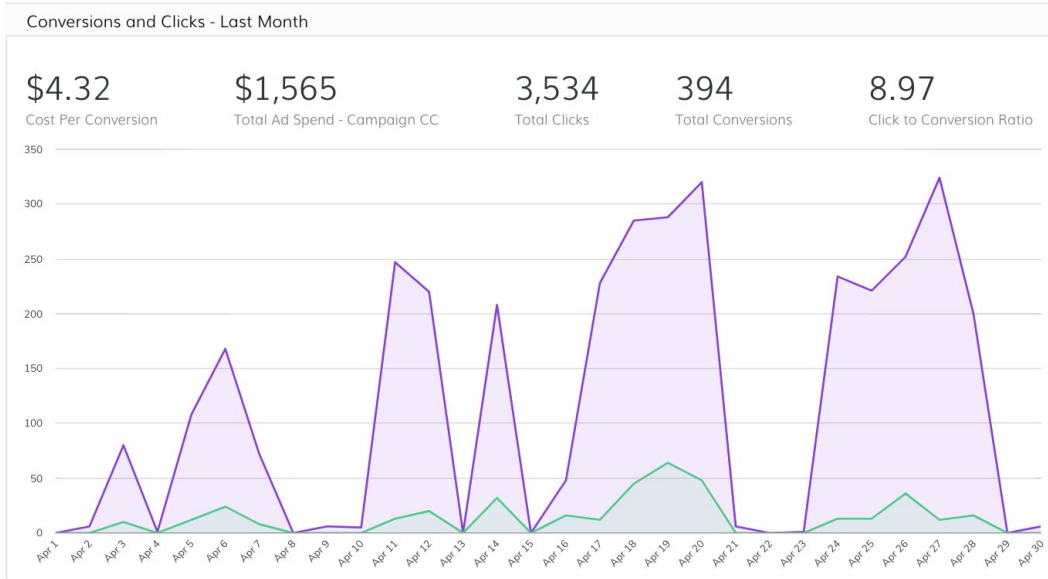
REPORT1

Add Transform

	A	B	C	D	E
1	ga:date				
2	2018-04-01				
3	2018-04-02				
4	2018-04-03				
5	2018-04-04				
6	2018-04-05				
7	2018-04-06				
8	2018-04-07				
9	2018-04-08				
10	2018-04-09				
11	2018-04-10	1892	1629	19851	
12	2018-04-11	1627	1249	19851	
13	2018-04-12	1662	1233	19851	
14	2018-04-13	1282	1079	19851	
15					



Practical: Google Adwords Metric



- Report: Campaign Ad Performance (Adwords)
- Only data from Campaign CC
- Calculate actual cost/conv.
- Hex value for “blueviolet”
- Hint: Remove any 0s to ensure your Cost/Conv average isn’t skewed



Adwords Metric - Hint 1/2

Edit New Metric

Metric Title
Conversions and Clicks - Last Month

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

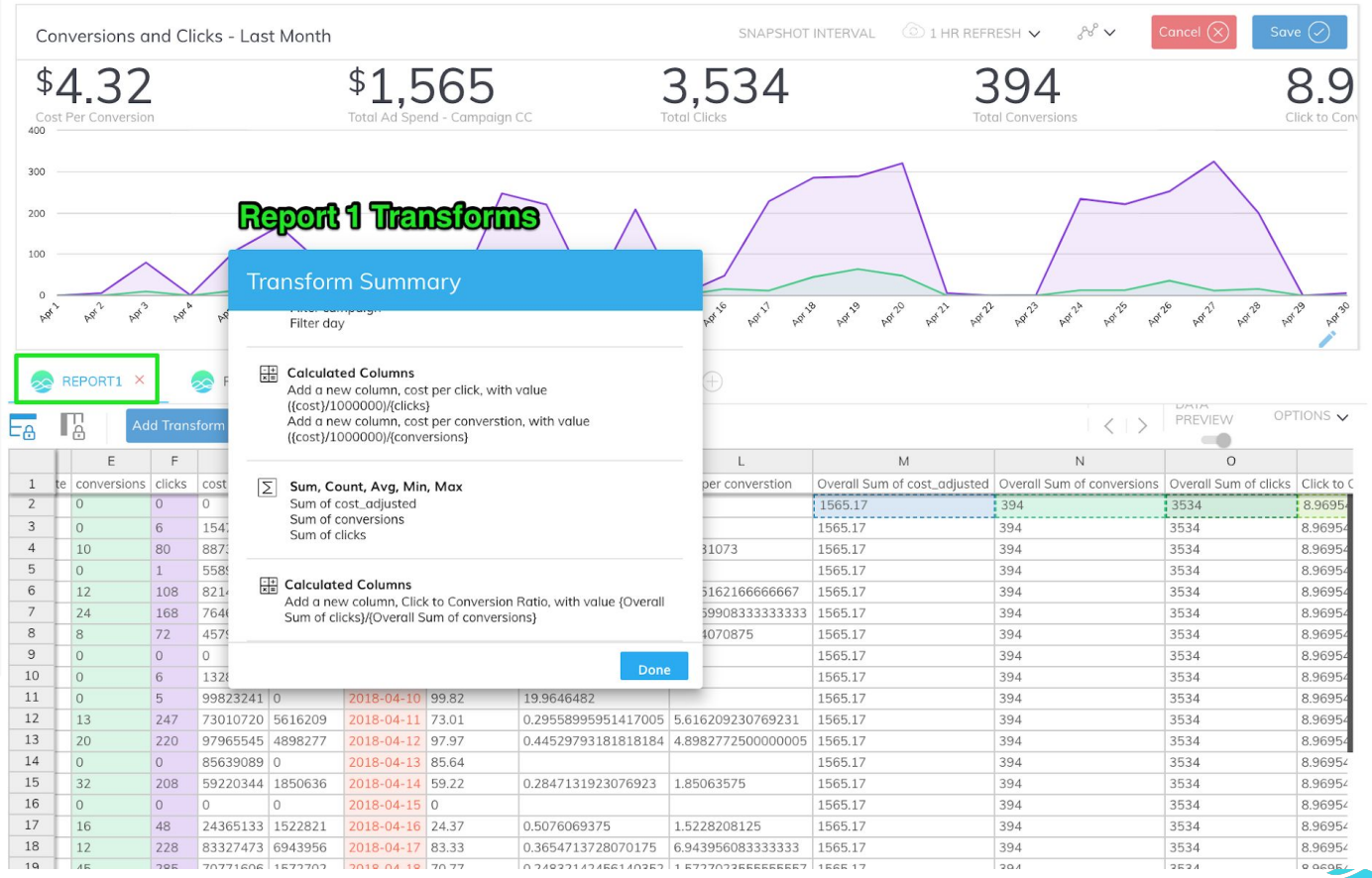
Chart Labels

Key Value

- REPORT2 / M2 Key Value
- REPORT1 / M2 Key Value
- REPORT1 / O2 Key Value
- REPORT1 / N2 Key Value
- REPORT1 / P2 Key Value

Add Value

Goal Line



Adwords Metric - Hint 2/2

Edit New Metric

Metric Title
Conversions and Clicks - Last Month

CHART SETTINGS DATA SETTINGS

Metric Description

Data Series

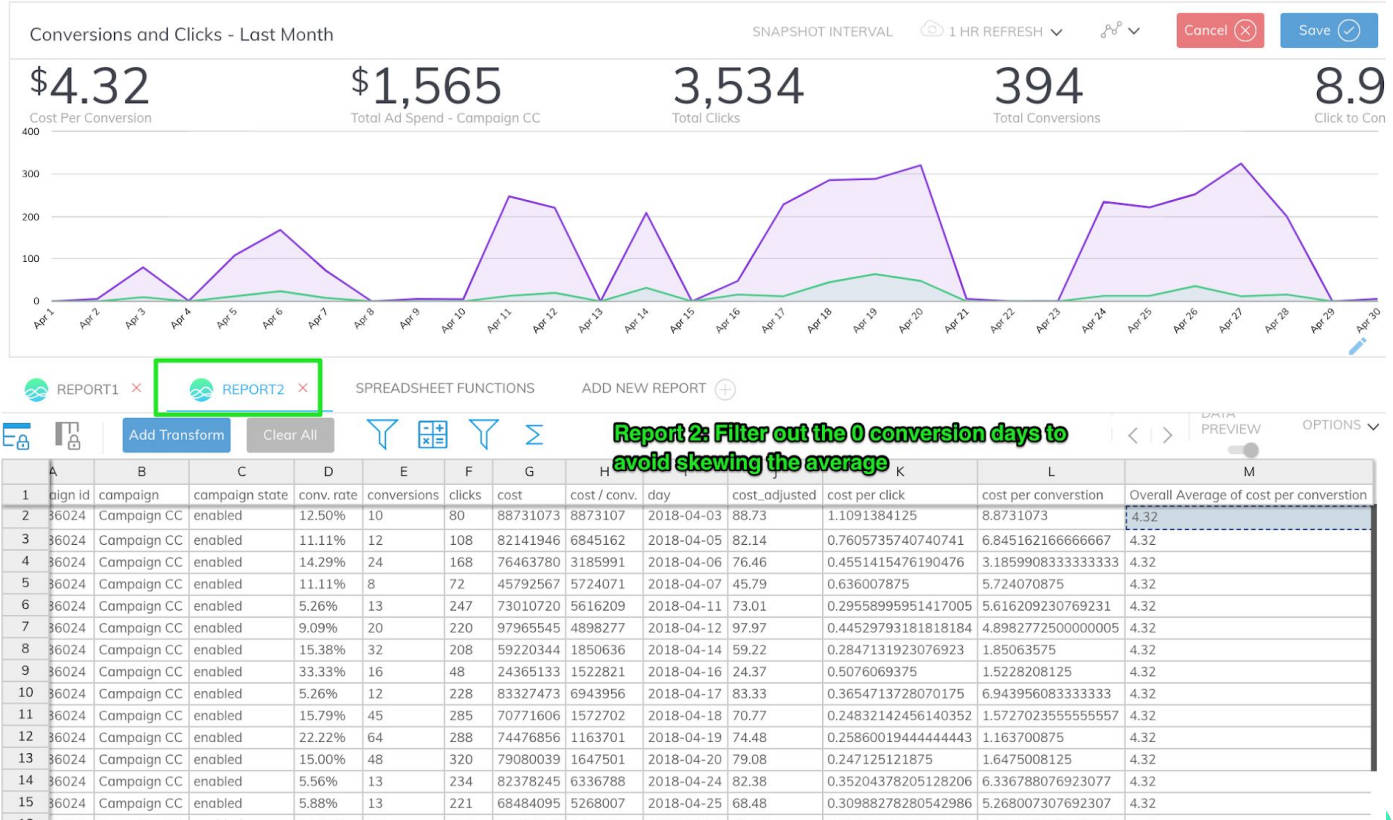
Chart Labels

Key Value

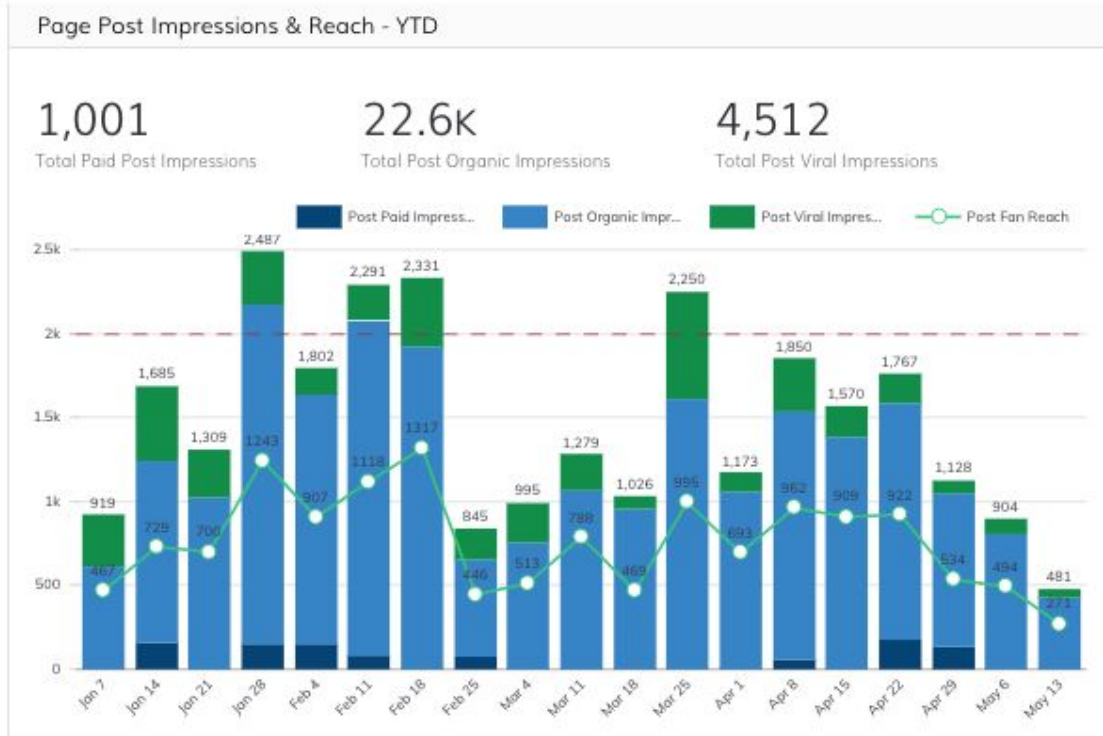
- REPORT2 / M2 Key Value
- REPORT1 / M2 Key Value
- REPORT1 / O2 Key Value
- REPORT1 / N2 Key Value
- REPORT1 / P2 Key Value

Add Value (+)

Goal Line



Practical: Facebook Metric



- Report: Marketing Post Analytics (FB v2)
- Column & Line Chart (fan reach as the line)
- YTD data
- Goal Line: 2,500
- Use the time shifter tool to shift the data by +5 hours
- Use the Rename Column tool to rename a header



Facebook Metric - Hint

Edit New Metric

Metric Title

Page Post Impressions & Reach - YTD

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column E Post Fan Reach
- REPORT1 / Column B Post Paid Impressio
- REPORT1 / Column C Post Organic Impres
- REPORT1 / Column D Post Viral Impressio

Add Data

Show Legend When Metric is Expanded

Display Legend on Bottom

Start Value Axis at 0

Select series Title from data set

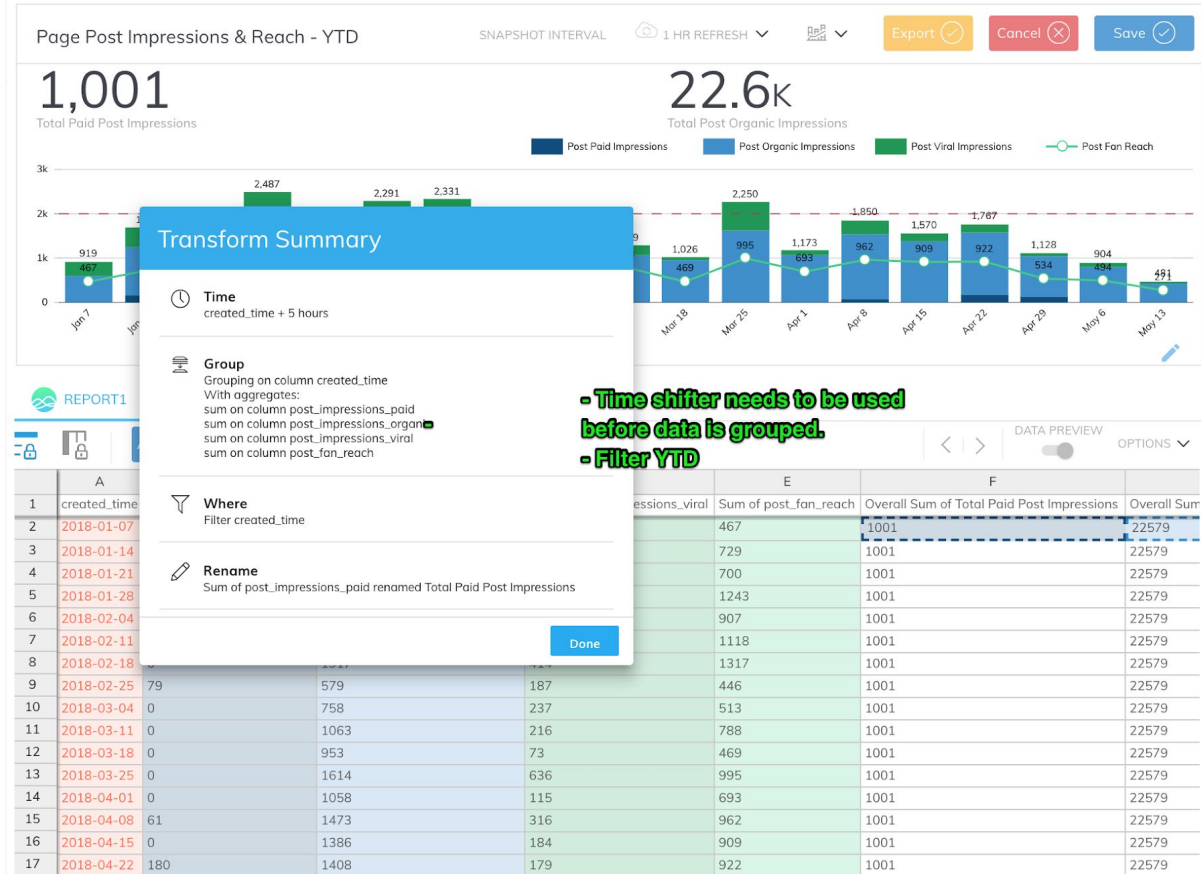
Add TrendLine

Display Totals

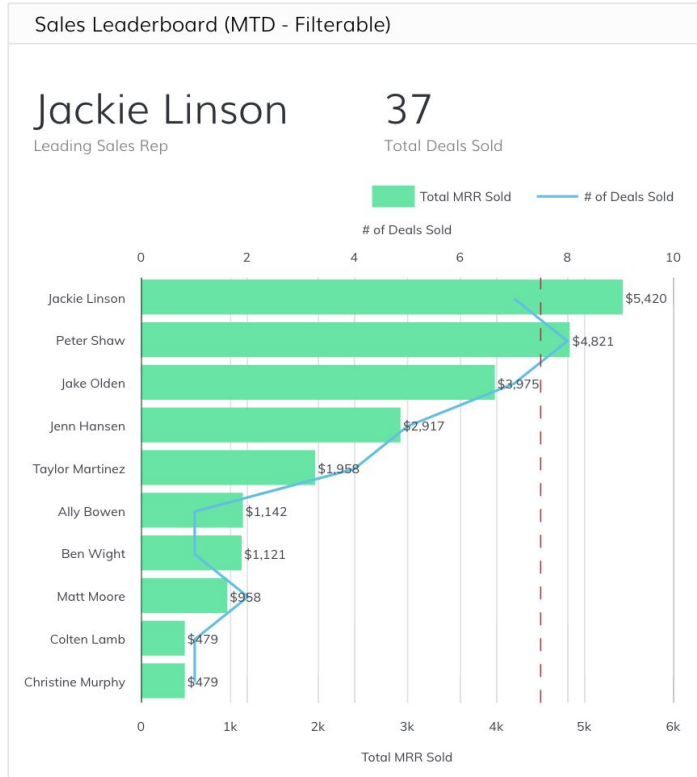
Format

Number, Rounded (1,235)

Chart Labels



Practical: Salesforce Metric



- Report: Sales Data (Salesforce)
- MTD Sales
- Text Key Value
- Goal: \$4500
- Match visuals and formatting



Salesforce/CRM Metric - Hint

Edit New Metric

Metric Title
Sales Leaderboard (MTD - Filterable)

CHART SETTINGS DATA SETTINGS

Metric Description

Data Series

Chart Labels

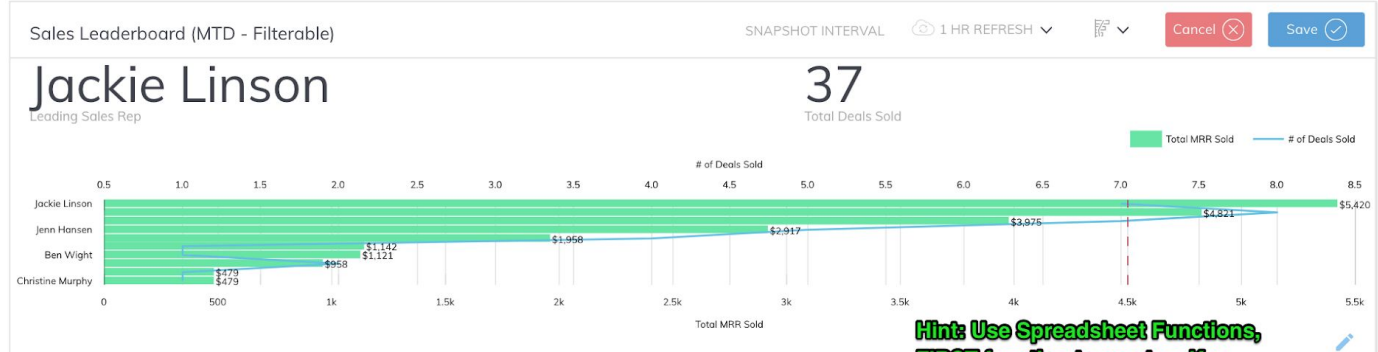
Key Value

SPREADSHEET / B1 Key Value

REPORT1 / D2 Key Value

Add Value

Goal Line



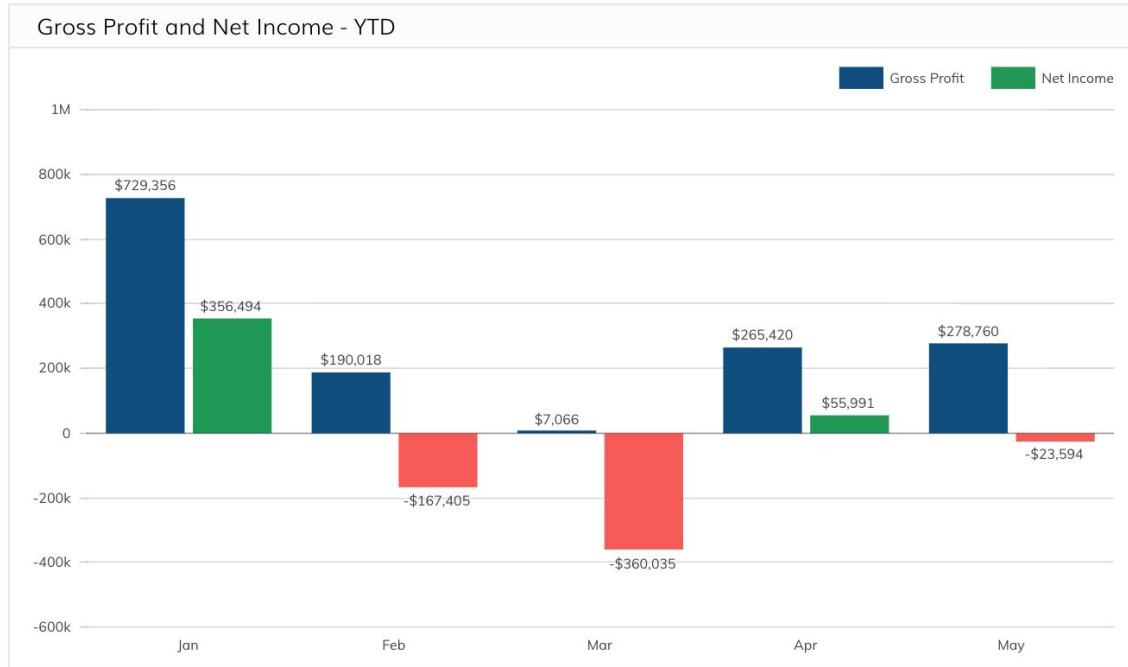
Hint: Use Spreadsheet Functions, FIRST function to create a Key value of leading sales rep.

REPORT1 SPREADSHEET FUNCTIONS ADD NEW REPORT

	A	B	C	D
1	Sales Rep	Sum of MRR	Count	Overall Sum of Count
2	Jackie Linson	5420.01	7	37
3	Peter Shaw	4820.85	8	37
4	Jake Olden	3974.59	7	37
5	Jenn Hansen	2916.67	5	37
6	Taylor Martinez	1958.34	4	37
7	Ally Bowen	1141.67	1	37
8	Ben Wight	1120.83	1	37
9	Matt Moore	958.34	2	37
10	Colten Lamb	479.17	1	37
11	Christine Murphy	479.17	1	37
12				



Practical: Quickbooks Online



- Report: Financial P&L QBO
- Remove Columns: Keep only relevant totals (Total Income, Total COGs, Total Gross Profit, Total Net Income, etc.)
- Data Series: Negative Values Red



Quickbooks Online Metric - Hint

Edit New Metric

Metric Title
Gross Profit and Net Income - YTD

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

REPORT1 / Column E

Gross Profit

REPORT1 / Column K

Net Income

Add Data

Show Legend When Metric is Expanded

Display Legend on Bottom

Start Value Axis at 0

Select series Title from data set

Add TrendLine

Enable 2 Value Axes

Chart Labels

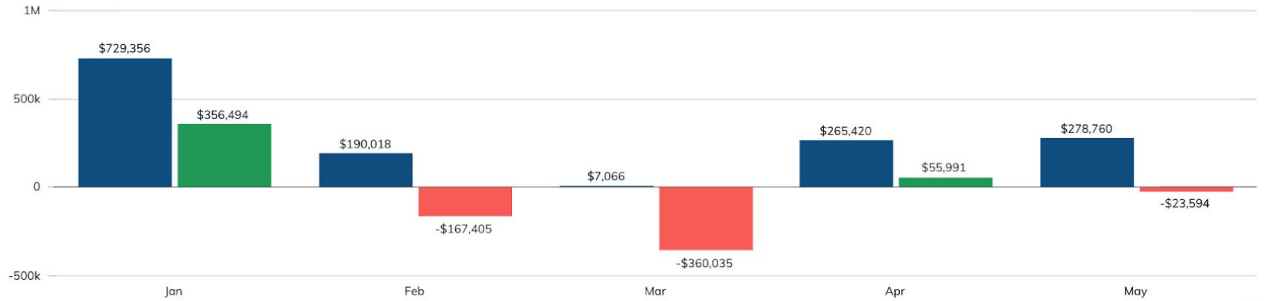
Gross Profit and Net Income - YTD

SNAPSHOT INTERVAL

1 HR REFRESH

Cancel

Save



REPORT1

SPREADSHEET FUNCTIONS

ADD NEW REPORT



Add Transform

Clear All



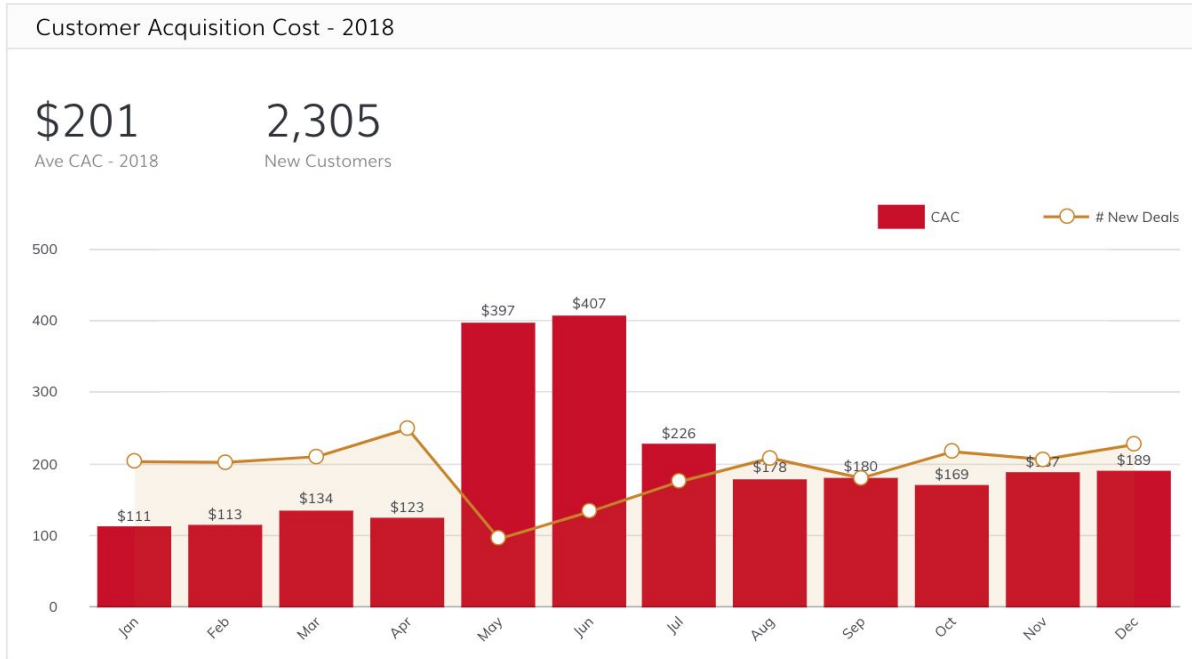
DATA PREVIEW

OPTIONS

	D	E	F	G	H	I
1	Net of Goods Sold.Total Cost of Goods Sold	Gross Profit	Expenses.Total Expenses	Net Operating Income	Other Income.Total Other Income	Other Expenses.Total Other Expense
2	251.29	729356.15	386756.21	342599.94	15000	1105.9
3	947.33	190018.28	356292.58	-166274.3	0	1130.21
4	225.41	7065.64	365280.1	-358214.46	0	1820.32
5	010.06	265419.71	208153.76	57265.95	0	1274.6
6	118.54	278760.48	301094.29	-22333.81	0	1260.42
7						
8						
9						
10						



Practical: Xero/CAC



- Report: Financial P&L Xero, Sales Data
- Calculated CAC
- Apply filters to the P&L to isolate relevant data

$$\text{CAC} = \frac{\text{Total Cost of Sales \& Marketing}}{\text{Number of Customers Acquired}}$$



Xero/CAC - Hint

Edit New Metric

Metric Title

Customer Acquisition Cost - 2018

CHART SETTINGS

JOINED REPORT SETTINGS

Metric Description

Data Series

- REPORT3 / Column E CAC
- REPORT3 / Column D # New Deals

Add Data

Show Legend When Metric is Expanded

Display Legend on Bottom

Start Value Axis at 0

Select series Title from data set

Add TrendLine

Enable 2 Value Axes

Chart Labels

Customer Acquisition Cost - 2018

SNAPSHOT INTERVAL

1 HR REFRESH

Cancel

Save

\$201

Ave CAC - 2018

2,305

New Customers



REPORT1

REPORT2

REPORT3 (JOIN)

SPREADSHEET FUNCTIONS

ADD NEW REPORT



Add Transform

Clear All



DATA PREVIEW

OPTIONS

**Need to Join data
Need to Substr the
date to month in
order to join**

	A	B	C	D	E	F	G
1	date	Total 02. Sales & Marketing	DateMonth	Count	CAC	Overall Average of CAC	Overall Sum of Count
2	2018-01-31	22755.1	2018-01	203	111.07	201.03	2305
3	2018-02-28	28085.66	2018-02	202	112.65	201.03	2305
4	2018-03-31	30559.22	2018-03	210	133.74	201.03	2305
5	2018-04-30	37673.95	2018-04	249	122.73	201.03	2305
6	2018-05-31	54099.56	2018-05	95	396.57	201.03	2305
7	2018-06-30	39578.57	2018-06	133	406.76	201.03	2305
8	2018-07-31	36960.99	2018-07	175	226.16	201.03	2305
9	2018-08-31	32440.27	2018-08	208	177.7	201.03	2305
10	2018-09-30		2018-09	180	180.22	201.03	2305

Practical: Shopify Metric #1



- Report: Ecommerce Data (Shopify)
- US Map
- Key value showing total cancelled orders



Shopify Metric #1 - Hint

Edit New Metric

Metric Title

Location of Orders, Last 30 Days

CHART SETTINGS

DATA SETTINGS

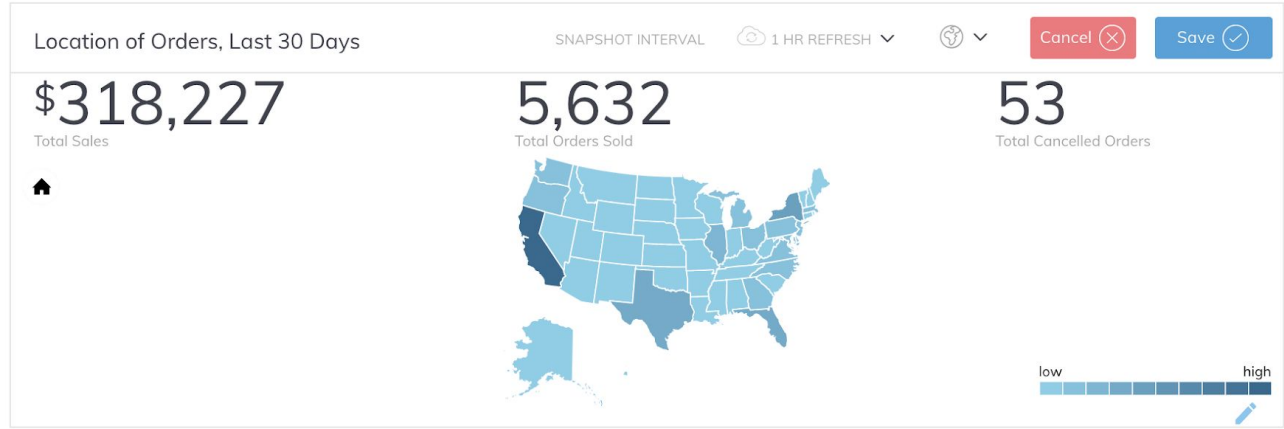
Metric Description

Region ID Selection

Data Series

Key Value

Filterable Columns



REPORT1 REPORT2 SPREADSHEET FUNCTIONS ADD NEW REPORT

Add Transform Clear All DATA PREVIEW OPTIONS

	A	B	C	D	E
1	shipping_address.province	Count	Sum of total_price_usd	Overall Sum of Count	Overall Sum of Sum of total_price_usd
2	New York	417	24793.73	5632	318227.36
3	Ontario	25	1942.04	5632	318227.36
4	Texas	330	17511.79	5632	318227.36
5	Florida	350	18890.26	5632	318227.36
6	Ohio	164	8952.34	5632	318227.36
7	District of Columbia	17	677.37	5632	318227.36
8	Massachusetts	124	6862.16	5632	318227.36
9	Indiana	88	4850.77	5632	318227.36
10	Delaware	204	11670.70	5632	318227.36

- Second Report to count the total cancelled orders
- Make sure to filter out the cancelled orders from the sales report



Practical: Shopify Metric #2

Cancellation Summary, Last 30 Days

45 Fraud Cancellations 7 Customer Cancellations

Filter Results...

Order Number	Cancelled Date	Processed Date	Total Price	Financial Status	Cancel Reason	State
111496	2018-03-28	3/28/18	\$124	refunded	fraud	Massachusetts
111498	2018-03-28	3/28/18	\$146	refunded	fraud	Massachusetts
237898	2018-04-26	4/26/18	\$175	refunded	fraud	Florida
237976	2018-04-27	4/26/18	\$140	refunded	fraud	New York
237994	2018-04-27	4/26/18	\$32	refunded	fraud	New York
238015	2018-04-27	4/27/18	\$257	refunded	fraud	Florida
237723	2018-04-25	4/25/18	\$105	refunded	fraud	Tennessee
237737	2018-04-25	4/25/18	\$31	refunded	fraud	Maryland
237772	2018-04-26	4/25/18	\$161	refunded	fraud	Maryland
237818	2018-04-26	4/25/18	\$125	refunded	fraud	New York
237134	2018-04-24	4/21/18	\$10	refunded	customer	California
236987	2018-04-20	4/20/18	\$135	refunded	fraud	Arizona
236990	2018-04-20	4/20/18	\$126	refunded	fraud	Arizona
236993	2018-04-20	4/20/18	\$98	refunded	fraud	Arizona

- Report: Ecommerce Data (Shopify)
- Table Chart
- Cancellation Summary
- Include table filter



Shopify Metric #2 - Hint

> Edit Metric

Metric Title

Location of Orders, Last 30 Days

CHART SETTINGS

DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column U Order Number
- REPORT1 / Column X Cancelled Date
- REPORT1 / Column D Processed Date
- REPORT1 / Column T Total Price
- REPORT1 / Column L Financial Status
- REPORT1 / Column S Cancel Reason
- REPORT1 / Column V State

Add Data

Select series Title from data set

Enable filter

Label Size

Location of Orders, Last 30 Days

SNAPSHOT INTERVAL

1 HR REFRESH



Cancel

Save

45

Fraud Cancellations

7

Customer Cancellations

Click to filter

Order Number	Cancelled Date	Processed Date	Total Price	Financial Status	Cancel Reason	State
111496	2018-03-28	3/28/18	\$124	refunded	fraud	Massachusetts
111498	2018-03-28	3/28/18	\$146	refunded	fraud	Massachusetts
237898	2018-04-26	4/26/18	\$175	refunded	fraud	Florida
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237994	2018-04-27	4/26/18	\$32	refunded	fraud	New York
238015	2018-04-27	4/27/18	\$257	refunded	fraud	Florida
237723	2018-04-25	4/25/18	\$105	refunded	fraud	Tennessee



REPORT1



REPORT2

SPREADSHEET FUNCTIONS

ADD NEW REPORT



Add Transform

Clear All



DATA PREVIEW

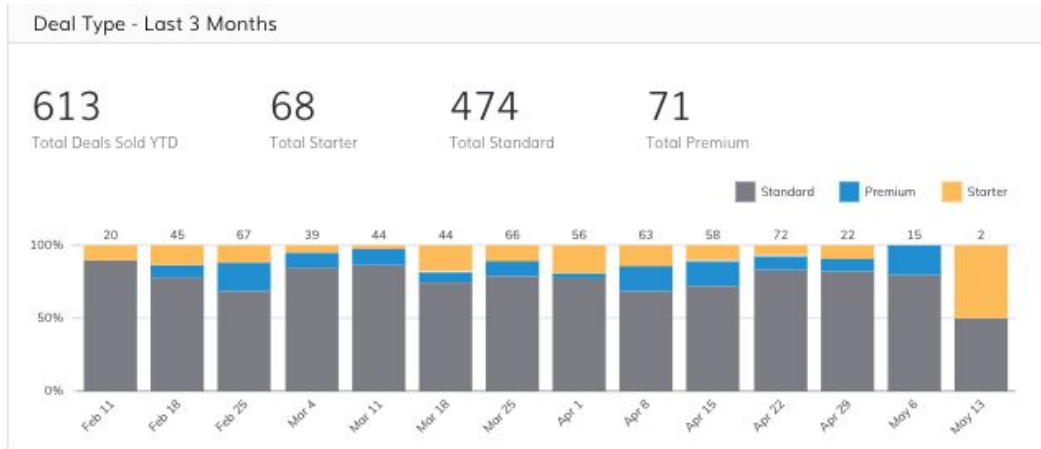
OPTIONS

	A	B	C	D	E	F	G	H	I	J	K	
1	closed_at_date	created at date	updated at date	processed at	gateway	total_price	subtotal_price	total_weight	total_tax	taxes_included	currency	financi
2	3/28/18	3/28/18	3/28/18	3/28/18	stripe	123.8	123.8	680	0		USD	refund
3	3/28/18	3/28/18	3/28/18	3/28/18	stripe	175.18	148.75	1921	0		USD	refund
4	4/26/18	4/26/18	4/26/18	4/26/18	stripe	175.18	148.75	1921	0		USD	refund
5	4/27/18	4/26/18	4/27/18	4/26/18	stripe	175.18	148.75	1921	0		USD	refund
6	4/27/18	4/26/18	4/27/18	4/26/18	stripe	37.01	219.8	3827	0		USD	refund
7	4/27/18	4/27/18	4/27/18	4/27/18	stripe	257.01	219.8	3827	0		USD	refund
8	4/25/18	4/25/18	4/25/18	4/25/18	stripe	104.85	104.85	286	0		USD	refund
9	4/25/18	4/25/18	4/25/18	4/25/18	paypal	31.42	26.96	422	0		USD	refund
10	4/26/18	4/25/18	4/26/18	4/25/18	stripe	161.23	134.8	2084	0		USD	refund

Report 2 Groups by Cancel Reason to Identify the Fraud vs Customer cancellations



Practical: SQLite Metric



- Report: Sales Data (Salesforce)
- SQL: Create new categories based on ACV.
 - Starter: Less than 6000
 - Standard: Between 6000 and 10000
 - Professional: Greater than 10000
 - Filter the last 3 months by close date
- Ensure that if the columns shift the data series labels stay up-to-date



SQLite Metric - Hint 1/2

Edit New Metric

Metric Title
Deal Type - Last 3 Months

CHART SETTINGS DATA SETTINGS

Metric Description

Data Series

- REPORT1 / Column B Standard
- REPORT1 / Column C Premium
- REPORT1 / Column D Starter

Add Data

- Show Legend When Metric is Expanded
- Display Legend on Bottom
- Start Value Axis at 0
- Select series Title from data set

Title selection:

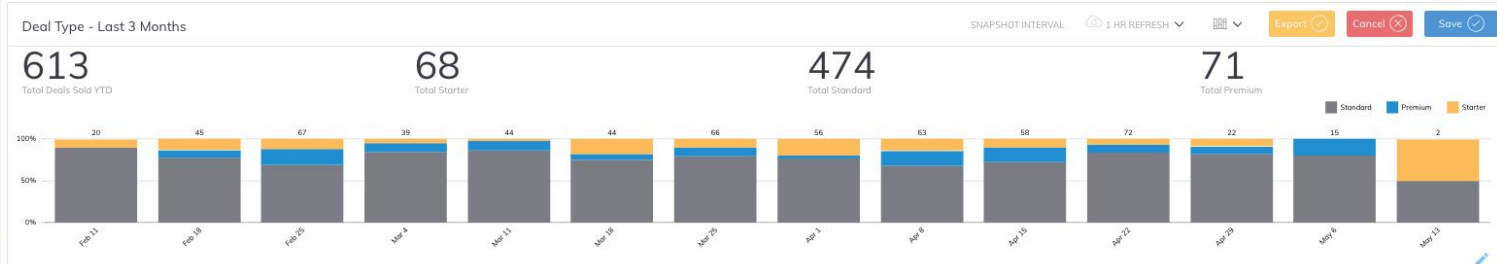
REPORT1 / B1 to D1

Clear title selection

- Add TrendLine
- Display Totals

Number format

- Chart Labels
- Key Value
- Filterable Columns



REPORT1 X SPREADSHEET FUNCTIONS ADD NEW REPORT

Add Transform Clear All

	A	B	C	D	E	F	G	H	I
1	CloseDate	Standard	Premium	Starter	Total Deals Sold	Overall Sum of Total Deals Sold	Overall Sum of Starter	Overall Sum of Standard	Overall Sum of Premium
2	2018-02-11	18	0	2	20	613	68	474	71
3	2018-02-18	35	4	6	45	613	68	474	71
4	2018-02-25	46	13	8	67	613	68	474	71
5	2018-03-04	33	4	2	39	613	68	474	71
6	2018-03-11	38	5	1	44	613	68	474	71
7	2018-03-18	33	3	8	44	613	68	474	71
8	2018-03-25	52	7	7	66	613	68	474	71
9	2018-04-01	43	2	11	56	613	68	474	71
10	2018-04-08	43	11	9	63	613	68	474	71
11	2018-04-15	42	10	6	58	613	68	474	71
12	2018-04-22	60	7	5	72	613	68	474	71
13	2018-04-29	18	2	2	22	613	68	474	71
14	2018-05-06	12	3	0	15	613	68	474	71
15	2018-05-13	1	0	1	2	613	68	474	71
16									
17									
18									
19									
20									
21									
22									
23									
24									
25									

DATA PREVIEW OPTIONS



SQLite Metric - Hint 2/2

```
SELECT
```

```
  `CloseDate`,  
  `MRR`,  
  `ACV`,
```

```
  CASE WHEN 1.0*`ACV` < 4500 THEN 'Starter'  
        WHEN 1.0*`ACV` >= 4500 AND 1.*`ACV` <= 10000 THEN 'Standard'  
        WHEN 1.0*`ACV` >= 10000 THEN 'Premium' END As PackageType
```

```
FROM report
```

```
WHERE `CloseDate` >= date('now','-3 months')  
      AND  
      `CloseDate` <= date('now')
```

