



WHITE PAPER

TRIMIT EXTENDED SALES STATISTICS 22.2

This document contains information about the Extended Sales Statistics and the Sales Analytics functionality in TRIMIT 22.2 for Microsoft Dynamics 365 Business Central 2022, Wave 2 (W1).

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INTRODUCTION

Getting an overview of products sold or expected sales is important to determine how your company is performing.

TRIMIT Extended Sales Statistics can provide you the information regarding goods sold and expected goods to be sold based on the Open and/or Posted Sales Orders.

It can be run in an infinite number of ways, regardless of whether you want Item or Customer related subjects to be leading for the Statistics output.

For frequently used combinations of the Statistics, you can create predefined **Extended Sales Statistics Setups**, so you do not have to enter all the parameters from scratch every time. You can even create context driven Statistics where you relate the Statistics to a certain type of Record enabling you to generate a Statistic for a specific Record of that type when you are standing on it, i.e., a Sales Order, a Customer, a Salesperson, etc.

Based on the **Extended Sales Statistics Setups**, you can view them in a page, or print a report, or show it in a browser as i.e., a diagram or donut – presuming you also have one of the TRIMIT Portals.

Besides the **Extended Sales Statistics Setups**, you are also able to see Sales Statistics on the fly with **Sales Analytics**, where you start with a specific Level (i.e., Country) and can drill down to the next Level (i.e., Salesperson) and the next (i.e., Customer) and the next (i.e., Master), and the next (i.e., Variant 1), etc. Every level will only be shown in a page and can be exported to Excel.

The audience for this document is the Consultant or very skilled User.

It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality.

Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 22.2 for Business Central W1 BC21.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 22.2**, which is based on Microsoft Dynamics 365 Business Central 2022 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Extended Sales Statistics contains the following objects:

The tables	6036352 trm Call Sales Order Stat
	6036397 trm Call Generate Stat
	6036398 trm Call Generate Stat Meta
	6036852 trm Statistics Specification
	6036853 trm Statistics Query Buffer
	6036854 trm Statistics Data
	6036855 trm Statistics Data Request
	6036856 trm Statistics Overview Header
	6036857 trm Statistics Overview Line
	6036858 trm Sales Stat Setup Header
	6036859 trm Sales Stat Setup Line
	6038136 trm Portal Sales Stat Temp
	6036854 trm Sales Analytics Request
The pages	6036855 trm Sales Analytics
	6036856 trm Sales Statistics Page
	6036857 trm Sales Stat Setup List
	6036858 trm Sales Stat Setup Header
	6036859 trm Sales Stat Setup Subpage
	6036863 trm Sales Stat Setup Line
	6036864 trm Statistics Data Warehouse
	6036865 trm Statistics Overview
	6036866 trm Stat Overview Subpage
	6036867 trm Statistics Overview List
The reports	6036850 trm Sales Statistics Report
The codeunits	6036670 trm Sales Order Statistics
	6036852 trm Statistics Query Handler
The queries	6036853 trm Statistics Output Handler
	6036850 trm Statistics Sales Invoices
	6036851 trm Stat Sales Credit Memos
	6036852 trm Statistics Sales Orders
	6036853 trm Stat Sales Orders ASI
	6036854 trm Statistics Budget Entries
	6036855 trm Statistics Output
	6036856 trm Stat Output Date
	6036502 trm Statistics Specification
Enum	

Besides these special objects, there are other objects changed for the **TRIMIT Extended Sales Statistics**, but they are not only specific for this functionality.

SETUPS

SALES & RECEIVABLES SETUP

Via **Search Sales & Receivables Setup**:

Customer	
General Order Creation Date Statistics Order Date ▼ Standard Customer STD ▼ Summary Invoice Filter Summary Invoice None ▼ Summary Invoicing Controlled by Sell-to Customer No. ▼ Generate Summary Order by Batch Po... ☐	
Blanket Order Blanket Sales Order Search Until Shipment Date (Ascending) ▼ Blanket Sales Order Search on Location ☒ WARNING: no blanket order found Yes ▼	

ORDER CREATION DATE STATISTICS

This Parameter determines which Date of the Sales Line will be taken for the Statistics to be compared with the Start-/End Dates or Start-/End Data Formulas of the periods that needs to be shown.

You can choose between the following two options:

Creation Date	The Creation Date from the Sales Line will be taken into the Sales Statistics.
Order Date	The Order Date from the Sales Line will be taken into the Sales Statistics.

STATISTICS DATA QUERY FOR REFRESH DATA

Besides running Statistics based on Real-time data, it is possible to use the Codeunit **6036852 trm Statistics Query Handler** to store data in Table **6036854 trm Statistics Data**.

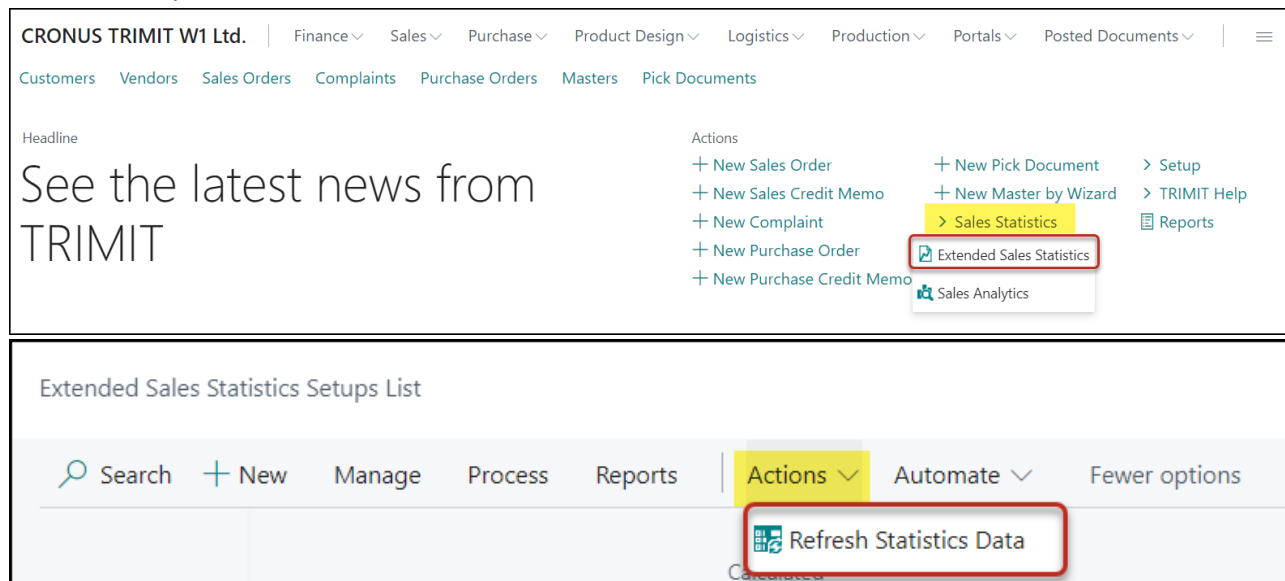
Because of performance, which is particularly important for statistics generated for the TRIMIT Webshops and Portals, it is recommended to use this possibility where 100% updated data are not crucial. However, some statistics will always require Real-time data, i.e., a Statistic on a Sales Order.

The Codeunit **6036852 trm Statistics Query Handler** can be set up in a Job Queue Entry to have the **Statistics Data** updated regularly.

When the Codeunit **trm Statistics Query Handler** is run manually (i.e., via the **Extended Sales Statistics Setups List**) or in a Job Queue Entry, Posted Sales Invoices, Posted Credit Memos, and Sales Import Lines (from the TRIMIT Portals/Webshops) are added to the Table **6036854 trm Statistics Data**, whereas all Sales Order information are regenerated.

MANUALLY

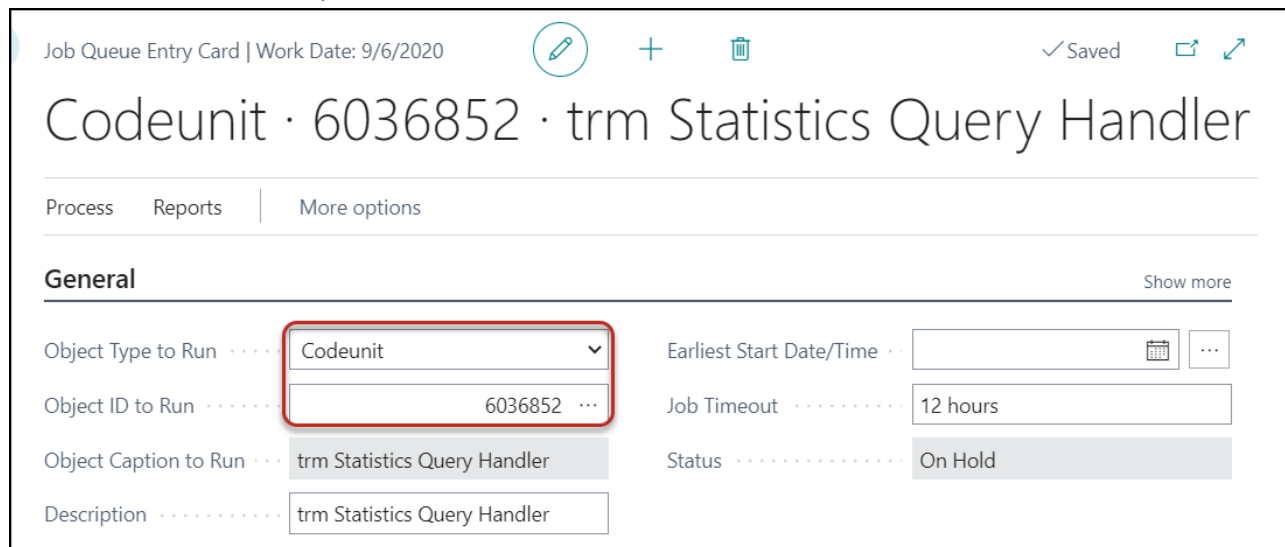
In Role Center **TRIMIT Small Business, Sales Statistics, Extended Sales Statistics** or **Search Extended Sales Statistics Setups List**:



The screenshot shows the TRIMIT Small Business interface. The top navigation bar includes links for Finance, Sales, Purchase, Product Design, Logistics, Production, Portals, and Posted Documents. The 'Sales Statistics' link is highlighted in the top navigation bar. Below the navigation bar, the 'Extended Sales Statistics Setups List' is displayed. The 'Actions' menu is open, showing options like 'New Sales Order', 'New Sales Credit Memo', 'New Complaint', 'New Purchase Order', and 'New Purchase Credit Memo'. The 'Extended Sales Statistics' option is highlighted in the 'Actions' menu. The 'Refresh Statistics Data' button is highlighted in the bottom navigation bar.

VIA JOB QUEUE ENTRY

Via **Search Job Queue Entry**:



The screenshot shows the Job Queue Entry Card for 'Codeunit · 6036852 · trm Statistics Query Handler'. The 'Object Type to Run' field is highlighted with a red box, showing 'Codeunit'. The 'Object ID to Run' field shows '6036852'. The 'Object Caption to Run' field shows 'trm Statistics Query Handler'. The 'Description' field shows 'trm Statistics Query Handler'. The 'Earliest Start Date/Time' field is empty. The 'Job Timeout' field shows '12 hours'. The 'Status' field shows 'On Hold'.

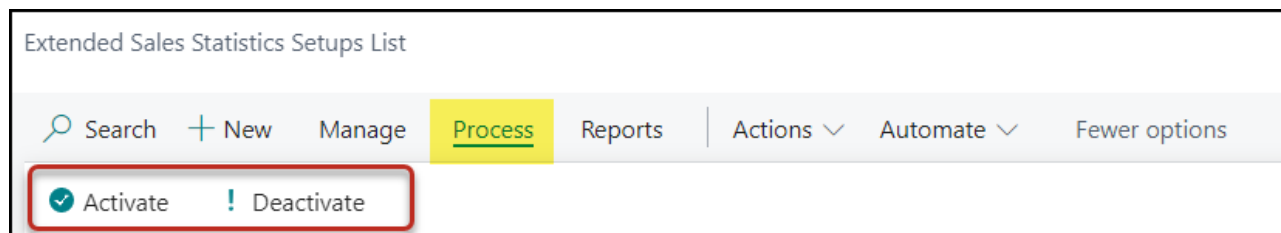
EXTENDED SALES STATISTICS SETUPS

Many filters and settings are available for the Extended Sales Statistics; some are mandatory, and others can be used when needed. A TRIMIT Extended Sales Statistics is always detailed by one topic and can then be grouped by 1, 2 or 3 other topics, which can be mixed, as you like.

You probably have specific Sales Statistics that you want to use frequently.

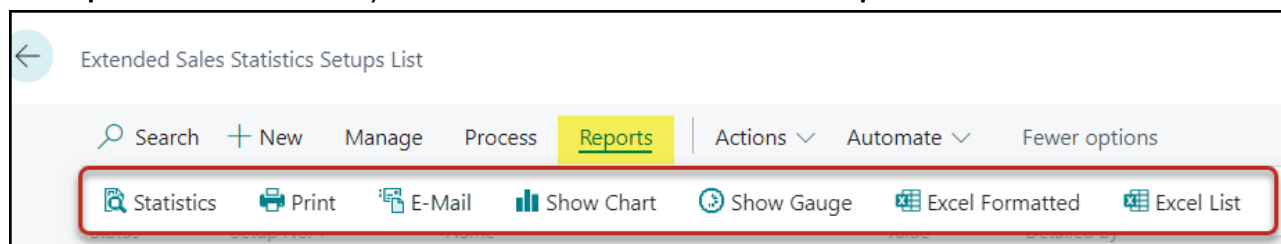
Therefore, you can create **Extended Sales Statistics Setups** with all the necessary settings and filters.

A **Setup No.** can be activated/deactivated directly from the **Extended Sales Statistics Setup List** or in the individual Cards.

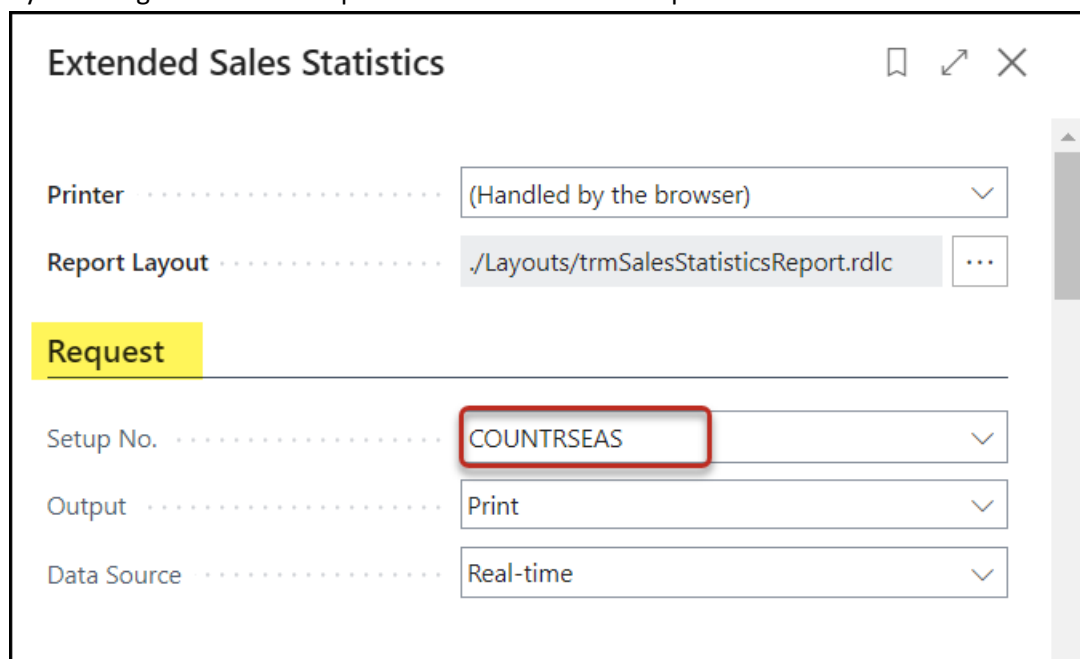


See [Status](#) for the details.

A **Setup No.** can be run directly from the **Extended Sales Statistics Setups List**.



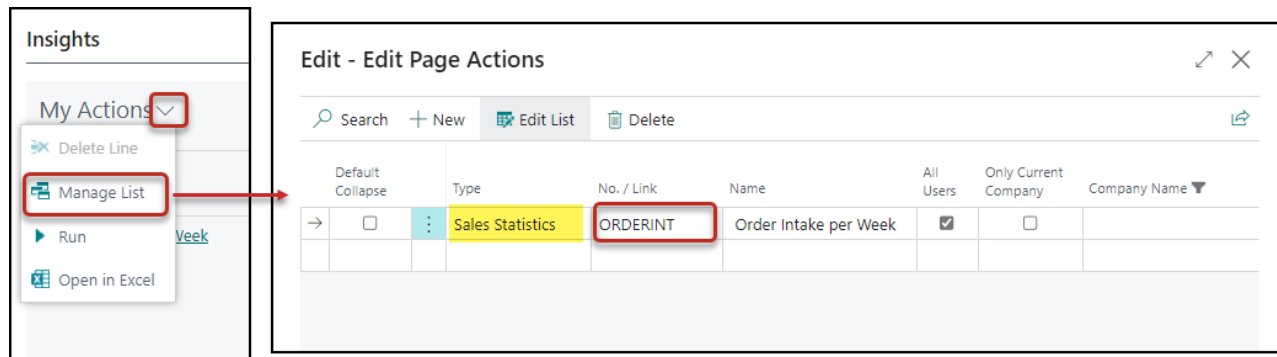
In addition, the **Setup No.** can also be used on the FastTab **Request** of the **Extended Sales Statistics** Report by selecting it from a look-up in the Sales Statistics Setup List.



Learn more regarding the **Extended Sales Statistics** Report in the chapter [Extended Sales Statistics Report](#).

In the TRIMIT Demo Company, there are several examples of **Extended Sales Statistics Setups** that also can be chosen directly in the **My Actions** FactBox in the TRIMIT Role Centers and in the **Page Actions** FactBox in many other pages by choosing the **Type Sales Statistics**.

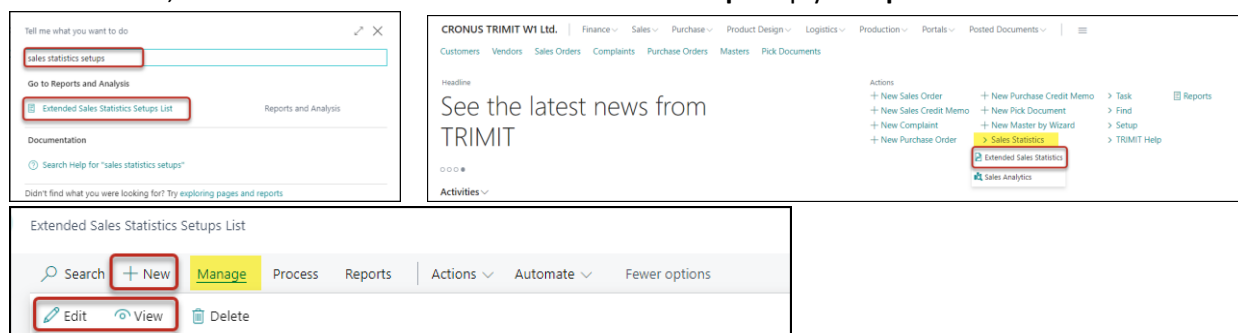
Learn more about the usage of these FactBoxes in the **White Paper – TRIMIT Role Center Features**.



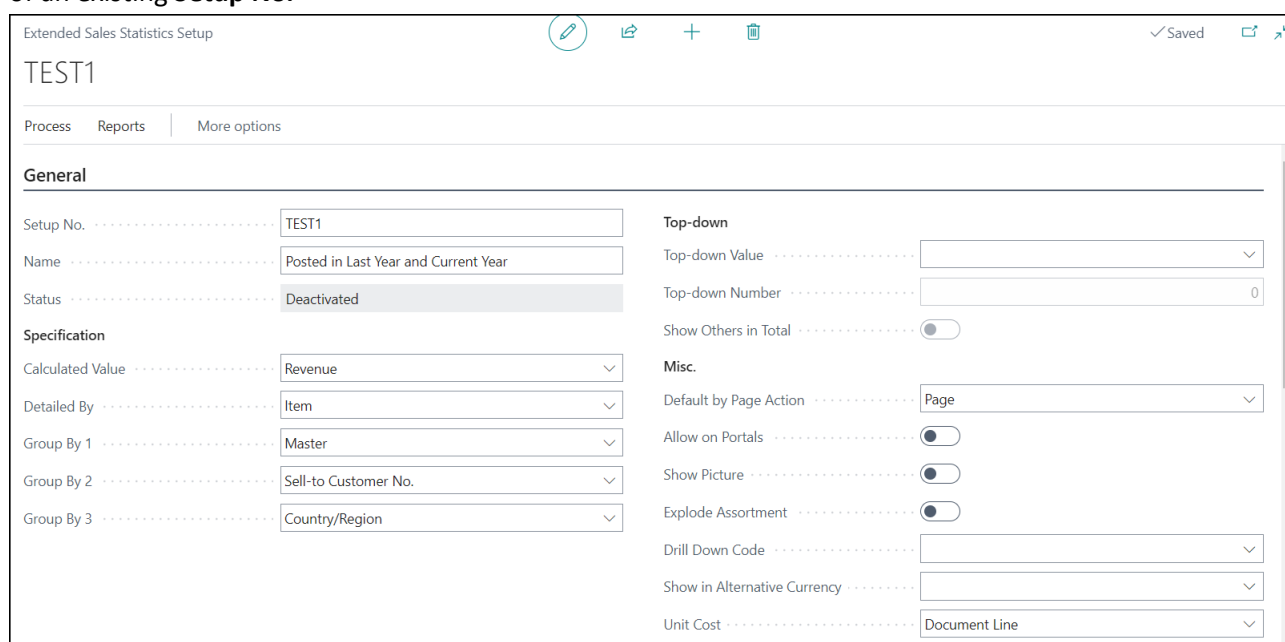
EXTENDED SALES STATISTICS SETUP NOS.

You can maintain the **Extended Sales Statistics Setup Nos.** via **Search Sales Statistics Setups** or – when using the **TRIMIT Small Business** Role Center by clicking **Sales Statistics, Extended Sales Statistics**.

From now on, we will call the **Extended Sales Statistics Setup** simply **Setup No.**



Click **+ New** to create a **Setup No.** or **Manage, Edit** or **Manage, View** to either Edit or just View the details of an existing **Setup No.**



FASTTAB GENERAL

SETUP NO.

The **Setup No.** is the code for this **Extended Sales Statistics Setup** and is later used to request this specific statistic with all its predefined settings and filters.

NAME

Here you can enter a Name for the **Setup No.** to help identifying it. You can use a maximum of 50 characters.

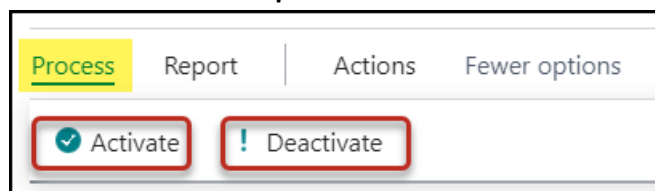
STATUS

The **Status** determines if the settings in the **Setup No.** can be changed and if the **Setup No.** can be chosen in the **Extended Sales Statistics** Report.

The **Status** can have the following values:

Deactivated	The fields of the Setup No. can be changed, and the Setup No. cannot be chosen in the Extended Sales Statistics Report.
Active	The fields of the Setup No. cannot be changed, and the Setup No. can be chosen in the Extended Sales Statistics Report.

The **Status** of the **Setup No.** can be set via the actions under *Process*: **Activate** and **Deactivate**.



CALCULATED VALUE

This field determines which Amounts/Quantities will be calculated in your Statistics.

You can choose between the following three options:

Revenue	Shows the Amount/Quantities in the selected intervals, entered in the Start-/End Date^{*)} or Start-/End Date Formula of the Data Series lines. This date will be compared with the Shipment Date of the Sales Orders and Sales Import Lines and the Posting Date of the Posted Sales Invoices and Posted Credit Memos.
Order Intake	Shows the Amount/Quantities in the selected intervals, entered in the Start-/End Date^{*)} or Start-/End Date Formula of the Data Series lines. Included in the Statistics will be: - Open Sales Orders and Sales Import Lines with <i>Creation Date</i> or <i>Order Date^{**)}</i> within the date interval defined in the Data Series lines. - Posted Sales Invoices and Posted Credit Memos based on closed Sales Orders with <i>Creation Date</i> or <i>Order Date^{**)}</i> within the date interval defined in the Data Series lines.
Order Book	Shows the Amounts/Quantities <u>until</u> a specific Date which must be entered into both Start -/End Date^{*)} or both Start/End Date Formula of the Data Series lines. Included in the statistics will be:

	- Open Sales Orders and Sales Import Lines with <i>Creation Date</i> or <i>Order Date</i>^{**)} equal to or before the stated date. - Posted Sales Invoices and Posted Credit Memos with Posting Date after the stated date if they are based on closed Sales Orders with <i>Creation Date</i> or <i>Order Date</i>^{**)} equal to or before the stated date.
--	--

*) **Start-/End Date** are not shown by default in the **Data Series** lines, but you can add them yourself via **Personalization**.

) *Creation Date* or *Order Date* depends on the parameter **Order Creation Date for Statistics in the Sales & Receivables Setup.

DETAILED BY

This field determines the most detailed level in your Statistics. The list of options is the same whether you look up from this field or any of the Grouping fields.

You can choose between the following 46 options:

Sell-to Customer No. Bill-to Customer Company Group Chain Salesperson Salesperson 2 Salesperson 3 Territory Country/Region Sell-to Group Sell-to Type Customer Statistics Group Sales Channel Order Type Collection Period Code	Global Dimension 1 Global Dimension 2 Location Currency Return Reason Campaign No. Item VarDim Y-Axis Master Group Master Product Family Item Statistics Group Item Statistics Group 2 Item Statistics Group 3 Item Statistics Group 4 Item Statistics Group 5	Item Category Code Forecast Item Tariff Position Primary Vendor Variant 1 Variant 2 Variant 3 Date Week Month Quarter Year Document Type Document No
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GROUP BY 1, 2 & 3

In these three **Group By** fields, you can set the topics for which you want a Sub-Total.

The option list contains the same topics by lookup from **Detailed By**.

Group By 1 will sum up the **Detailed By** lines according to your choice of Group By 1 topic, **Group By 2** will sum up the **Group By 1** lines according to your choice of Group By 2 topic, etc.

As an example, the result of the values shown in **TEST1** of the previous page:

Sales Statistics | Work Date: 9/6/2023

Request Param.

Request No. TEST1

Data Source DateTime2/14/2023 2:00 PM

Series 1

Date: 01/01

Data SourceReal-time

Global FiltersIntercompany: No

Series 2

Date: 12/31

PrintE-MailShow ChartShow GaugeExcel FormattedShow in Analytics

Code	Description	Quantity (1)	Amount GBP (1)	Discount GBP (1)	Budget Amount GBP (1)	Quantity (2)	Amount GBP (2)	Discount GBP (2)	Budget Amount GBP (2)
GB	Great Britain	4,052	210,219	797	0	0	0	0	0
10000	The Cannon Group PLC B27 4KT Birmingham	525	28,471	336	0	0	0	0	0
MASTER (BLANK)	Master [blank]	50	11,373	336	0	0	0	0	0
1920-S	ANTWERP Conference Table	1	420	0	0	0	0	0	0
1964-IV	INNSBRUCK Storage Unit/G.Door	10	2,920	0	0	0	0	0	0
1968-S	MEXICO Swivel Chair, black	3	351	19	0	0	0	0	0
1996-S	ATLANTA Whiteboard, base	7	6,030	317	0	0	0	0	0
70011	Glass Door	5	362	0	0	0	0	0	0
LS-150	Loudspeaker, Cherry, 150W	10	1,290	0	0	0	0	0	0
LS-MAN-10	Manual for Loudspeakers	14	0	0	0	0	0	0	0
2100	Lily Blouse	475	17,098	0	0	0	0	0	0
21003002	Lily Blouse Yellow,S	25	900	0	0	0	0	0	0
21003003	Lily Blouse Yellow,M	50	1,800	0	0	0	0	0	0
21003004	Lily Blouse Yellow,L	50	1,800	0	0	0	0	0	0
21003005	Lily Blouse Yellow,XL	50	1,800	0	0	0	0	0	0
21003006	Lily Blouse Yellow,XXL	25	900	0	0	0	0	0	0
21009002	Lily Blouse Black,S	50	1,800	0	0	0	0	0	0
21009003	Lily Blouse Black,M	75	2,699	0	0	0	0	0	0
21009004	Lily Blouse Black,L	75	2,699	0	0	0	0	0	0
21009005	Lily Blouse Black,XL	50	1,800	0	0	0	0	0	0
21009006	Lily Blouse Black,XXL	25	900	0	0	0	0	0	0
2000	The Fashion Store UK WC1 3DG London	1,566	58,063	0	0	0	0	0	0
2100	Lily Blouse	405	14,580	0	0	0	0	0	0
21002002	Lily Blouse Royal Blue,S	2	72	0	0	0	0	0	0
21002003	Lily Blouse Royal Blue,M	3	108	0	0	0	0	0	0

Because you are free, to choose any of the topics as both **Detailed By** and **Group By 1-3**, it is your own responsibility to do the setup logically. If you for instance have chosen *Master* as **Detailed By**, it would make no sense to choose *Item* for your **Group By 1** subtotal.

TOP-DOWN VALUE

Here you can enter one of the **Columns 1-4** values set up for the first **Data Series** and the Statistics will be sorted according to this Value starting with the highest value and downwards.

The sorting will first be performed for **Group By 3**, then **Group By 2**, **Group By 1** and finally for **Detailed By**. With the setup shown above the Statistics would be sorted in *Country/Region* order, within each Country/Region in *Sell-to Customer No.* order, within each Sell-to Customer No. in *Master No.* order and finally in *Item No.* order within each Master No.

The options that can be chosen are the same as for the **Columns 1-4**:

Quantity

Amount LCY

Cost LCY

Discount LCY

Amount

Cost

Discount

Budget Quantity

Budget Amount

Budget Cost

GM

Budget GM

Net Weight

Gross Weight

Volume

TOP-DOWN NUMBER

If you have set a value in the **Top-Down Value**, you can use this field to limit the number of Lines shown in the Statistics. If you enter 5, you will see a top 5 List according to the Value specified in i.e., the **Detailed By** field if you do not have a **Group 1**, **Group 2** or **Group 3** filled.

Be aware that **Top-Down Number** are always the top Value records in the context they are in. I.e., if you have **Detailed By Item** with **Group By 1 Sell-to-Customer** you will not see the top xx *Items* – but the top xx *Sell-To-Customers* per Item. Therefore, having a top List makes most sense with only one level.

If **Top-Down Value** is set and no **Top-Down Number** it will just sort top down, and this will go on each level – meaning **Group By 3** sorted tops down. Within each **Group By 3** it will sort on **Group By 2**, and again within each **Group By 2** it will sort on **Group By 1**, and again within each **Group By 1** it will sort on **Detailed By**.

SHOW OTHERS IN TOTAL

If you have set a limitation in **Top-Down Number**, the Totals will only include the limited number of Lines. If you still want to see the Totals unaffected by the limitation, you can set a check mark here.

This means, that if **Top-Down Number** would be 5, all the other Lines – besides these 5 **Top-Down Values** will be summarized in one Line.

DEFAULT BY PAGE ACTION

When you generate context driven Statistics, you cannot select the output format from time to time, so you need to predefine it here. You have seven options corresponding to the seven available actions by running the Statistics from the **Extended Sales Statistics Setups List** or the **Extended Sales Statistics** report.

You can choose between the following seven options:

Print	This will start the Extended Sales Statistics report in which the Setup No. already will be filled.
Excel List	Will show the Data Series Label, Group By 3, Group By 2, Group By 1, Detailed By , Description of Detailed By and the values of all the possible topics that can be chosen for the Columns 1 – 4 .
Excel Formatted	Will show the Group By 3, Group By 2, Group By 1, Detailed By , Description of Detailed By and the values for the Columns 1 – 4 of the lines in the Data Series on the lines in an Excel Sheet.
Page	Will open a page with the representation of the Statistics.
E-Mail *)	Will send a pdf-file of the report based on the default E-Mail Template for Report 6036850 Extended Sales Statistics
Chart	Can only be chosen if you also have installed one of the TRIMIT Portals. In that case, it will open a webpage and show the outcome as a Chart, based on the settings in FastTab Charts .
Gauge	Can only be chosen if you also have installed one of the TRIMIT Portals. In that case, it will open a webpage and show the outcome as a Gauge, based on the settings in FastTab Gauge .

*) See *White Paper – TRIMIT E-Mail* for the details to setup this **E-Mail Template**.

ALLOW ON PORTALS

Here you can set a check mark if the current Extended Sales Statistics Setup shall be available in the TRIMIT Portals.

SHOW PICTURE

If you set a check mark here, a Picture on a Master or Item will be shown at the Master/Item lines of the Statistics as well as the related Item Lines. This is only applicable if the **Detailed By** is set to *Master* or *Item*.

EXPLODE ASSORTMENT

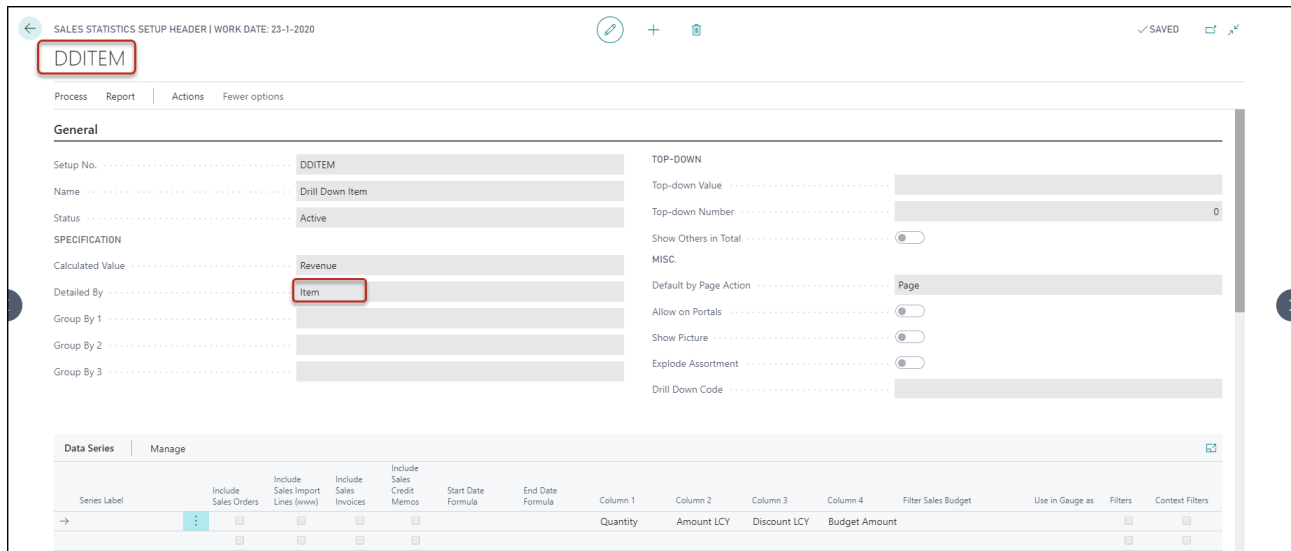
A check mark in this field will show the Quantities detailed on Pieces in the Assortment instead of the Quantity of the Assortment itself.

DRILL DOWN CODE

You can enter a **Setup No.** in this field enabling you to look up from the Values in the Statistics output to get further specification of that Value.

When you create the setup for the **Drill Down Code**, you only must fill **Setup No.** and **Detailed By** and click **Process, Activate**. When the drill down is performed, the setup of the specification will be according to the setup of the Statistics Line you are coming from, and the drill down data will be shown according to the setup in the **Detailed By** field of the **Drill Down Code**.

If we for instance have a Drill Down Code with **Detailed By** set to *Item*:



SALES STATISTICS SETUP HEADER | WORK DATE: 23-1-2020

DDITEM

Process Report Actions Fewer options

General

Setup No. DDITEM TOP-DOWN

Name Drill Down Item Top-down Value

Status Active Top-down Number 0

SPECIFICATION

Calculated Value Revenue Show Others in Total

Detailed By Item MISC.

Group By 1 Default by Page Action Page

Group By 2 Allow on Portals

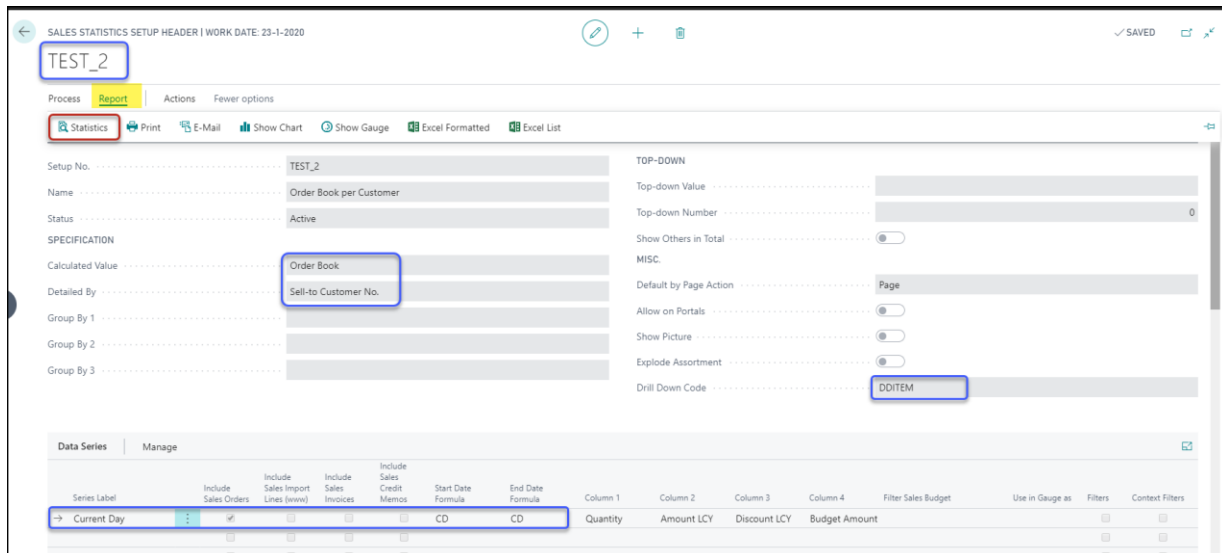
Group By 3 Show Picture

Drill Down Code

Data Series Manage

Series Label	Include Sales Orders	Include Sales Import Lines (www)	Include Sales Invoices	Include Sales Credit Memos	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge as	Filters	Context Filters
Current Day	☒	☐	☐	☐	CD	CD	Quantity	Amount LCY	Discount LCY	Budget Amount				

Add the drill down code to an *Order Book* statistic:



SALES STATISTICS SETUP HEADER | WORK DATE: 23-1-2020

TEST_2

Process Report Actions Fewer options

Statistics Print E-Mail Show Chart Show Gauge Excel Formatted Excel List

Setup No. TEST_2 TOP-DOWN

Name Order Book per Customer Top-down Value

Status Active Top-down Number 0

SPECIFICATION

Calculated Value Order Book Show Others in Total

Detailed By Sell-to Customer No. MISC.

Group By 1 Default by Page Action Page

Group By 2 Allow on Portals

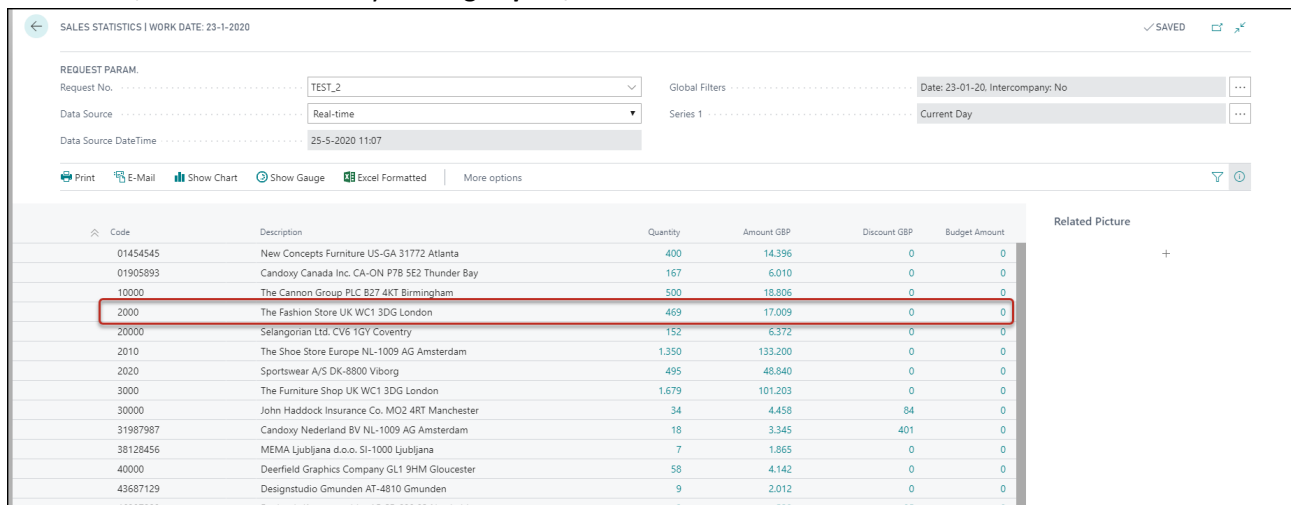
Group By 3 Show Picture

Drill Down Code DDITEM

Data Series Manage

Series Label	Include Sales Orders	Include Sales Import Lines (www)	Include Sales Invoices	Include Sales Credit Memos	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge as	Filters	Context Filters
Current Day	☒	☐	☐	☐	CD	CD	Quantity	Amount LCY	Discount LCY	Budget Amount				

In addition, run the statistics by clicking **Report, Statistics**:



SALES STATISTICS | WORK DATE: 23-1-2020

REQUEST PARAM.

Request No. TEST_2 Global Filters Date: 23-01-20, Intercompany: No

Data Source Real-time Series 1 Current Day

Data Source DateTime 25-5-2020 11:07

Print E-Mail Show Chart Show Gauge Excel Formatted More options

Code	Description	Quantity	Amount GBP	Discount GBP	Budget Amount
01454545	New Concepts Furniture US-GA 31772 Atlanta	400	14,396	0	0
01905893	Candoxy Canada Inc. CA-ON P78 5E2 Thunder Bay	167	6,010	0	0
10000	The Cannon Group PLC B27 4KT Birmingham	500	18,806	0	0
2000	The Fashion Store UK WC1 3DG London	469	17,009	0	0
20000	Selanganion Ltd. CV6 1GY Coventry	152	6,372	0	0
2010	The Shoe Store Europe NL-1009 AG Amsterdam	1,350	133,200	0	0
2020	Sportswear A/S DK-8800 Viborg	495	48,840	0	0
3000	The Furniture Shop UK WC1 3DG London	1,679	101,203	0	0
30000	John Haddock Insurance Co. MO2 4RT Manchester	34	4,458	84	0
31987987	Candoxy Nederland BV NL-1009 AG Amsterdam	18	3,345	401	0
38128456	MEMA Ljubljana d.o.o. SI-1000 Ljubljana	7	1,865	0	0
40000	Deerfield Graphics Company GL1 9HM Gloucester	58	4,142	0	0
43687129	Designstudio Gmunden AT-4810 Gmunden	9	2,012	0	0

Related Picture

You can point at any column Value and click to see the included Items.

SALES STATISTICS | WORK DATE: 23-1-2020

✓

SAVED

REQUEST PARAM.

Request No.

TEST_2

Data Source

Real-time

Data Source DateTime

25-5-2020 11:08

Global Filters

Date: 23-01-20, Intercompany: No. Sell-to Customer No.: 2000

Series 1

Current Day

Print

E-Mail

Excel Formatted

More options

Code	Description	Quantity	Amount GBP	Discount GBP	Budget Amount
21009901	Lily Blouse BlackXS	10	360	0	0
21009902	Lily Blouse BlackS	12	432	0	0
21009903	Lily Blouse BlackM	22	792	0	0
21009904	Lily Blouse BlackL	22	792	0	0
21009905	Lily Blouse BlackXL	21	756	0	0
21009906	Lily Blouse BlackXXL	20	720	0	0
21009907	Lily Blouse Black3XL	10	360	0	0
22102704	Poppy Blazer Steelblue.4	2	100	0	0
22102706	Poppy Blazer Steelblue.6	4	200	0	0
22102708	Poppy Blazer Steelblue.8	8	400	0	0
22102710	Poppy Blazer Steelblue.10	8	400	0	0
22102712	Poppy Blazer Steelblue.12	4	200	0	0
22102714	Poppy Blazer Steelblue.14	2	100	0	0
22102716	Poppy Blazer Steelblue.16	2	100	0	0
24106501	Katie Scarf Lawn Green.150 x 25 cm	5	35	0	0
24109901	Katie Scarf Black.150 x 25 cm	5	35	0	0
TOTAL	Total List	469	17.013	0	0

Related Picture

SHOW IN ALTERNATIVE CURRENCY

This field is not by default visible in the page: you can add it by using **Personalize**.

Entering an Alternative Currency, means, that the Amounts can also be shown in this Alternative Currency. It will however not calculate the Amounts in the Alternative Currency based on the historical Exchange Rates. It will first calculate the Amounts for your Local Currency, and then take current Exchange Rate to calculate the Amounts in the Alternative Currency.

You also need to make sure that you choose the right options for the **Columns 1 – 4** of the **Data Series**: **Amount**, **Cost** and **Discount** instead of **Amount LCY**, **Cost LCY** and **Discount LCY** to see the Amounts in the Alternative Currency.

FASTTAB DATA SERIES

Data Series Manage																	
New Line Delete Line Setup/Filters																	
Series Label	Include Sales Orders	Include Sales Import Lines (www)	Include Sales Invoices	Include Sales Credit Memos	Always Quantity from Sales Credit Memo	Start Date	End Date	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge as	Filters	Context Filters
Last year	☒	☒	☒	☒	☐			-CY-1Y	-CY-1D	Quantity	Amount LCY	Discount LCY	Budget Am...			☐	☐
→ This year	☒	☒	☒	☒	☐			-CY	CY	Quantity	Amount LCY	Discount LCY	Budget Am...			☐	☐

Here you can set up the Data Series for the **Setup No.**

You can enter the values along the line if you only need the Fields included here.

To get a better overview for some of the Fields and to set Filters as well, you can click **Manage**, **Setup/Filters** after you have created a new Line by entering a **Series Label**.

SERIES LABEL

Here you can enter a Series Label Name as a help for yourself, but it is not necessary, unless you need to go to the **Setup/Filters**.

If you use the **Setup No.** with the **Extended Sales Statistics** report, you might call the first two Data Series Lines **Series 1** and **Series 2** referring to the FastTabs **Series 1** and **Series 2** of the Request page of the Report.

Nevertheless, the Statistics output would always use the first Data Series Line for the first four Columns, the second Data Series Line for the next four Columns etc. with no regards to the Series Labels.

You can create a maximum of five Data Series if you export to Excel but by printing or shown in page or chart, only the first two Data Series lines will be calculated and shown.

INCLUDE SALES ORDERS

If you want Sales Orders included in your Statistics, set a check mark here.

INCLUDE SALES IMPORT LINES (WWW)

If you want Sales Import Lines from the portals included in your Statistics, set a check mark here.

You can see these Lines in the **Portal Sales Documents** and **Portal Sales Documents with Errors**.

INCLUDE SALES INVOICES

If you want Posted Sales Invoices included in your Statistics, set a check mark here.

INCLUDE SALES CREDIT MEMOS

If you want Posted Sales Credit Memos included in your Statistics, set a check mark here.

ALWAYS QUANTITY FROM SALES CREDIT MEMO

This field is not by default visible: you can add it via **Personalize**.

Credit Memos can be created with or without **Inventory Adjmt. Credit Memo**.

Lines	Manage	More options	Exp... Mat...	Type	No.	Description	Description 2	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Disc... %	Related Order No.	Brand Code	Season Code	Inventory Adjmt. Credit Memo
→	☒		☒	Matrix	2100	Lily Blouse		B-CHOICE	5	PCS	35.99	179.95			FASHI...	02-SUMMER	No (Statistics with only Sales Amount Reduc...
	☐		☐	Item	21002001	Lily Blouse	Royal Blue.XS	B-CHOICE	5	PCS	35.99	179.95			FASHION	02-SUMMER	No (Statistics with only Sales Amount Reduced)

This influences the Quantity of the Item that is coming back from the Customer.

I.e., a Complaint with “Refund” will not get any Quantity back, while a Complaint with “Refund on Return” will get Quantity back.

Therefore, if **Always Quantity of Credit Memo** is set to *No* might result in:

Code	Description	Quantity	Amount GBP	Cost GBP	GM
103001	Posted Invoice 103001	77	2,310	0	100
6000	Shirt	77	2,310	0	100
103002	Posted Invoice 103002	20	720	345	52
2100	Lily Blouse	20	720	345	52
104001	Posted Credit Memo 104001	0	-180	0	100
2100	Lily Blouse	0	-180	0	100
104002	Posted Credit Memo 104002	-10	-360	-173	52
2100	Lily Blouse	-10	-360	-173	52
TOTAL	Total List	87	2,490	172	93

The **Quantity** is 0 (zero) because the **Inventory Adjmt. Credit Memo** was set to *No (Statistics with only Sales Amount reduced)*.

But if **Always Quantity of Credit Memo** is set to **Yes**, it might result in:

Print E-Mail Show Chart Show Gauge Excel Formatted Show in Analytics More options						
Code	Description	Quantity	Amount GBP	Cost GBP	GM	
103001	Posted Invoice 103001	77	2,310	0	100	
6000	Shirt	77	2,310	0	100	
103002	Posted Invoice 103002	20	720	345	52	
2100	Lily Blouse	20	720	345	52	
104001	Posted Credit Memo 104001	-5	-180	0	100	
2100	Lily Blouse	-5	-180	0	100	
104002	Posted Credit Memo 104002	-10	-360	-173	52	
2100	Lily Blouse	-10	-360	-173	52	
TOTAL	Total List	82	2,490	172	93	

Now the **Quantity** is -5 (the quantity of the Posted Credit Memo), but the **Cost GBP** remains 0.

START DATE

This field is not by default visible: you can add it via **Personalize**.

Here you can enter the Start Date of the Data Series.

If **Calculated Value** is set to **Order Book**, **Start Date** and **End Date** must have the same value.

END DATE

This field is not by default visible: you can add it via **Personalize**.

Here you can enter the End Date of the Data Series.

If **Calculated Value** is set to **Order Book**, **Start Date** and **End Date** must have the same value.

START & END DATE FORMULA

Instead of setting static Dates as **Start Date** and **End Date**, you can use Date Formulas.

If **Calculated Value** is set to **Order Book**, **Start Date Formula** and **End Date Formula** must have the same value.

The Date Formulas are standard Microsoft Dynamics 365 Business Central functionality, and you can learn how to use them by searching for “Using Date Formulas” in the online help.

[Entering dates and times in Business Central - Business Central | Microsoft Learn](#)

COLUMN 1, 2, 3 AND 4

For each Data Series you have four columns defining which information you want to see.

You can choose between the following options – the Grey highlighted lines are the defaults for the specific column.

Quantity	Quantity	Quantity	Quantity
Amount LCY	Amount LCY	Amount LCY	Amount LCY
Cost LCY	Cost LCY	Cost LCY	Cost LCY
Discount LCY	Discount LCY	Discount LCY	Discount LCY
Amount	Amount	Amount	Amount
Cost	Cost	Cost	Cost
Discount	Discount	Discount	Discount
Budget Quantity	Budget Quantity	Budget Quantity	Budget Quantity
Budget Amount	Budget Amount	Budget Amount	Budget Amount
Budget Cost	Budget Cost	Budget Cost	Budget Cost
GM	GM	GM	GM
Budget GM	Budget GM	Budget GM	Budget GM
Net Weight	Net Weight	Net Weight	Net Weight
Gross Weight	Gross Weight	Gross Weight	Gross Weight
Volume	Volume	Volume	Volume
		(C1-C2)	(C1-C2)
		(C1 pct. of C2)	(C1 pct. of C2)

Column 1

Column 2

Column 3

Column 4

GM stands for *Gross Margin %*. This will be calculated by **Amount LCY – Cost LCY / Amount LCY * 100** .

(C1-C2) stands for content of Column 1 – content of Column 2, i.e., *Amount LCY – Cost LCY*

(C1 pct. of C2) stands for content of Column 1 / content of Column 2 * 100, i.e., *Amount LCY / Cost LCY * 100*

NOTE

If you have entered a **Show in Alternative Currency**, make sure that you use the **Amount, Cost** and **Discount** to see the amounts in this Alternative Currency.

The **Amount LCY, Cost LCY and Discount LCY** will always only show it in your own Currency and the **Show in Alternative Currency** will simply be neglected.

Keep in mind that **Budget Amount** and **Budget Cost** will only be available in your Local Currency.

NOTE

When using the [Sales Statistics Setups List](#) you can compare **five** different Data Series.

This will only make sense if you export the Statistic to Excel; it does not fit on paper.

FILTER SALES BUDGET

In this field, you can enter the Name of the **Item Sales Budget** that you want to use for making a comparison between Sold and Budget.

Keep in mind however, that the Microsoft Dynamics 365 Business Central Item Sales Budgets can only be entered per *Customer, Item, Location, Period, Vendor* and the (financial) *Dimensions*.

Moreover, you can only enter values for *Sales Amount, Cost Amount* and *Quantity*. This means, that if you want to have Statistics per *Item Statistics Group 2* and want to compare the sold Revenue with the budgeted Revenue, you need to be sure that you also have a financial Dimension for this connected to all your Items. Otherwise, the system will simply add the Budgets of the Items within an Item Statistics Group 2 to make the comparison.

When using an Alternative Currency: keep in mind that the Budgets will always be in Local Currency!!

USE IN GAUGE AS

In this field, you determine if this Date Series Line should be used as *Value* or as *Threshold* for a Gauge output.

I.e., you have two **Data Series** Lines: one for *Last Year* and one for *Current Year*.

By setting the first Line to *Threshold*, you can see the percentage for the Value of the Current Year related to the Value of Last year. In that case, the Values in the **Min. Value** and **Max. Value** on the FastTab **Gauge** will be considered as percentages, as well as the **Threshold 1** and **Threshold 2** regardless the **Gauge Value Type**.

FILTERS

In this field, a check mark will be set by the system automatically if one of the Filters is filled via **Manage, Setup/Filters**.

CONTEXT FILTERS

In this field, a check mark will be set by the system automatically if one of the Filters is filled via **Manage, Setup/Filters**, and starts with an “=”.

DATA SERIES, FASTTAB GENERAL

You can open the **Sales Statistics Setup Line** page via **Manage, Setup/Filters**.

Data Series		Manage								
		 New Line  Delete Line  Setup/Filters								
Series Label		Include Sales Orders	Include Sales Import Lines (www)	Include Sales Invoices	Include Sales Credit Memos	Alw... Qua... from Sales Credit Me...	Start Date	End Date	S	D
Last year		☒	☒	☒	☒	☐			-	
→ This year		☒	☒	☒	☒	☐			-	

Here you have the fields from the Data Series line presented in a different view.

Sales Statistics Setup Line






Saved


TEST1 · 20000

General

Transactions

Include Sales Orders ☒
Include Sales Import Lines (www) ☒
Include Sales Invoices ☒
Include Sales Credit Memos ☒
Always Quantity from Sales Credit Memo ☐

Dates

Start Date Formula
End Date Formula

Budget

Columns

Series Label

All fields have already been described in [FastTab Data Series](#).

Also in this page, **Always Quantity from Sales Credit Memo** is not visible by default, but you can add it via **Personalize**.

DATA SERIES, FASTTAB FILTERS

On each Data Series line, you have 40 fields grouped in **General**, **Customer Related** and **Item Related** filters that you can use for minimizing the Statistics output to exactly the information you need.

Filters		
General Filters		
Filter Document Type		
Filter Document No.		
Filter Sales Channel		
Filter Order Type		
Filter Collection No.		
Filter Period Code		
Brand Filter		
Season Filter		
Filter Location Code		
Filter Currency Code		
Filter Return Reason Code		
Filter Campaign No.		
Filter Intercompany		
Filter Complaint		
Customer Related		
Filter Sell-to Customer No.		
Filter Bill-to		
Filter Company Group		
Filter Chain		
Filter Salesperson		
Filter Salesperson 2		
Filter Salesperson 3		
Filter Territory		
Filter Country/Region Code		
Filter Sell-to Group		
Filter Sell-to Type		
Filter Statistics Group		
Item Related		
Filter Item No.		
Filter VarDim Y-Axis		
Filter Master No.		
Filter Group Master		
Filter Product Family		
Design Filter		
Item Group Filter		
Gender Filter		
Item Statistics Group 4 Filter		
Item Statistics Group 5 Filter		
Filter Item Category Code		
Filter Forecast Item		
Filter Tariff Position		
Filter Primary Vendor		

When you enter filters into the first Data Series line, they will be inherited to the next Data Series lines if no filters are set there. As soon as just one filter is set on the next Data Series lines, no filters at all are inherited from the first Data Series line.

FASTTAB CHARTS

If your system includes TRIMIT Portals, you can have the Statistics shown as Charts, both on the Portals and in TRIMIT Business Central. A Chart will always show the chosen **Chart Value** arranged by the subject specified in the **Detailed By** field.

Charts	
Chart Type	Column
Chart Value	Amount LCY
Stack	☐
Label Axis	No. & Name
Label ToolTip	No. & Name
Dashboards	
Label Axis in Dashboard	No. & Name
Top-down Number in Dashboard	0

CHART TYPE

Here you select the appearance of the chart. You can choose *Column*, *Bar*, *Line*, *Pie*, *Donut* or *Area*.

The Chart Types *Pie* and *Donut* can only show one Data Series line, whereas the others can show two.

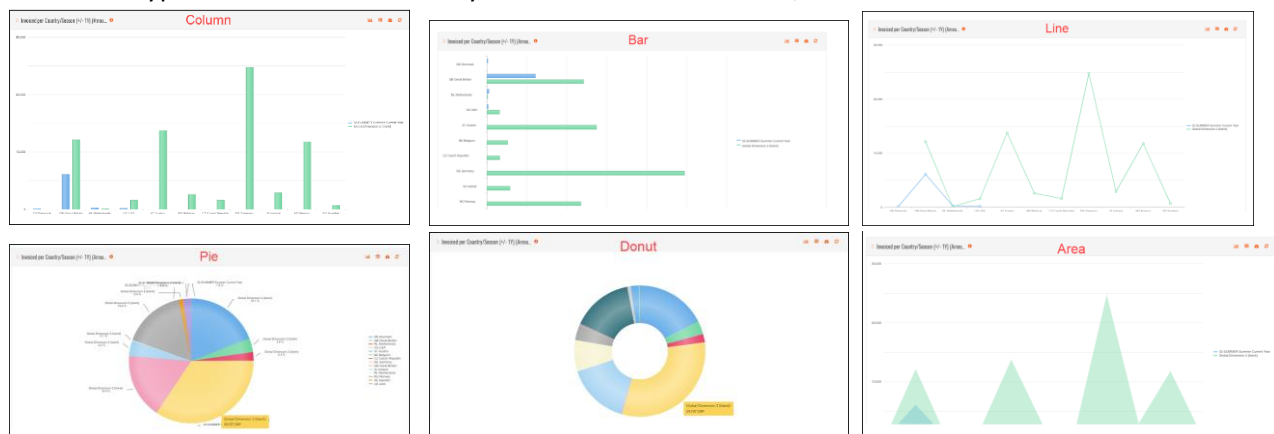


CHART VALUE

Here you specify which value you want the chart to show, and it does not necessarily have to be one of the values set for the **Columns 1-4**.

You have the following options from which **Amount LCY** is the default:

Quantity
Amount LCY
Cost LCY
Discount LCY
Amount
Cost
Discount
Budget Quantity
Budget Amount
Budget Cost
GM
Budget GM
Net Weight
Gross Weight
Volume
Column 1
Column 2
Column 3
Column 4

STACK

If you have two **Data Series** lines in a **Chart Type** *Column, Bar* or *Line*, you can choose to show the two Series side by side with both starting from point zero. However, if you check mark this field, the values of the two series will be stacked on top of each other.

LABEL AXIS

Here you can choose the content of the **Detailed By** labels in the Chart when it is shown in TRIMIT Business Central on the Windows Client or Web Client.

You can choose either *No.*, *Name* or both *No. & Name* so if Customers detail your Chart, you can show either Customer No., Customer Name or both Customer No. & Name.

LABEL AXIS IN DASHBOARD

Here you can choose the content of the **Detailed By** labels in the Chart when it is shown on the TRIMIT Portal Dashboard. You can choose either *No.*, *Name* or both *No. & Name* so if Customers detail your Chart, you can show either Customer No., Customer Name or both Customer No. & Name.

LABEL TOOLTIP

Here you can choose the content of the **Detailed By** labels in the Chart when it is shown in the ToolTips. You can choose either *No.*, *Name* or both *No. & Name* so if Customers detail your Chart, you can show either Customer No., Customer Name or both Customer No. & Name.

Besides the specified label, the Tooltip will always show the **Chart Value**.

TOP-DOWN NUMBER IN DASHBOARD

When charts are shown in the Dashboard of a TRIMIT Portal, space is limited. Then you can use this parameter to limit the number of Statistics Lines shown in the Chart. This field is only valid when the Chart is shown in the Dashboard; as soon as you click on the Chart to zoom, you will see the entire Statistics according to all the other setup fields.

FASTTAB GAUGE

If your system includes TRIMIT Portals, you can have the Statistics shown as Gauge, both on the Portals and in TRIMIT Business Central.

Gauge			
Gauge Value Type	Actual Value	Threshold 1	25,000
Min. Value	0	Threshold 2	75,000
Max. Value	100,000	Range Style	Unfavorable -> Favorable

GAUGE VALUE TYPE

Here you can choose how you want to present the **Column 1** Value into the Gauge: as an *Actual Value* or *Percent(age)*.

MIN. VALUE

Here you can enter a Value for the Minimum of the Values shown in the Gauge in Local Currency.

MAX. VALUE

Here you can enter a Value for the Maximum of the Values shown in the Gauge in Local Currency.

THRESHOLD 1

Here you can enter a Value as first Threshold in your Gauge in Local Currency.

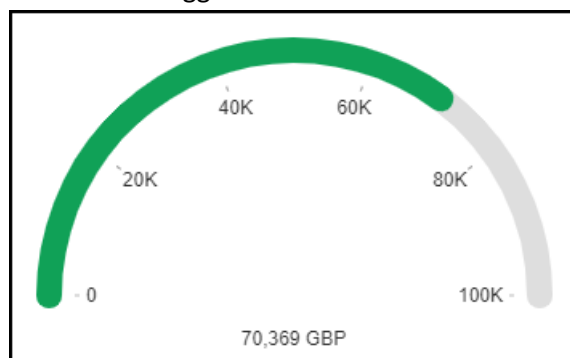
THRESHOLD 2

Here you can enter a Value as second Threshold in your Gauge in Local Currency.

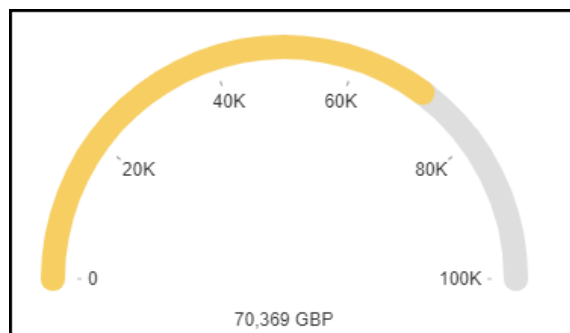
RANGE STYLE

Here you can choose which Values will be shown as **Red**, **Orange** and **Green** of the Gauge.

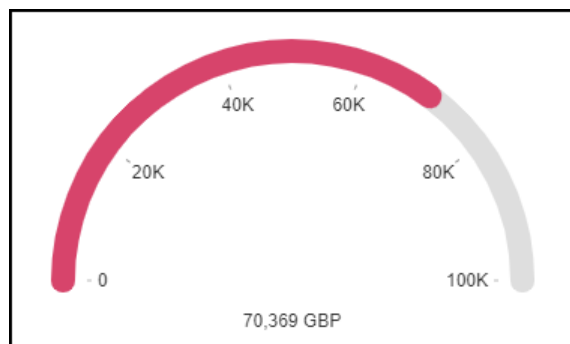
Unfavorable -> Favorable will show the Gauge from **Min. Value** to **Max. Value** where the total Value will show in **Red** if it is smaller than **Threshold 1**, in **Orange** if it is between **Threshold 1** and **Threshold 2** and in **Green** if it is bigger than **Threshold 2**.



if value (70.369) is > than Threshold 2



if value (70.369) is between Threshold 1 and Threshold 2



if value (70.369) is < than Threshold 1

Favorable -> Unfavorable will show the Gauge from **Min. Value** to **Max. Value** where the total value will show in **Green** if it is smaller than **Threshold 1**, in **Orange** if it is between **Threshold 1** and **Threshold 2** and in **Red** if it is bigger than **Threshold 2**.

FASTTAB VARIANTS

When you on FastTab **General** enter the Values *Variant 1, 2 or 3* into the **Detailed By** or **Group By 1, 2 or 3** fields, the Variant Numbers 1, 2 and 3 are referring to the **VarDim Type Placement in Item No.** of the VarDim Master of the Masters.

Edit - VarDim Master List - 4700 · Roger Brogue					
Search + New Edit List Delete Card Variant Table Copy More options					
Type	VarDim Type	Description	VarDim Type Placement in Item No.	Consistent Inheritance	
→ Variant	SHOE_COLOR	Shoe Color	Variant 1	☐	
Variant	SHOE_SURF	Shoe Surface	Variant 2	☐	
Variant	SHOE_SOLE	ShoeSole Type	Variant 3	☐	
Variant	SHOE_WIDTH	Shoe Width	Variant 4	☐	
Variant	SHOE_US	US Shoe Sizes 5 - 13	Variant 5	☐	

However, perhaps the same **VarDim Type** does not have the same *Variant No.* in all Masters/Items so if you want to detail or group by a specific **VarDim Type** you can set it up here.

Variant 1 VarDim Type Filter

Variant 2 VarDim Type Filter

Variant 3 VarDim Type Filter

Search in VarDim Order

If you for instance want to group by **VarDim Type** *COLOR_1* with no regards to its **VarDim Type Placement in Item No.**, you can enter *COLOR_1* into the relevant field of the **Variant 1-3 VarDim Type Filter**. Records without *COLOR_1* will be shown in the Statistics with [blank].

You could also for instance fill in **Variant 1 VarDim Type Filter** *COLOR**. In that case, it is used as a filter string and the Value will be taken from the first **VarDim Type Replacement in Item No.** on the Master that is within this filter.

VARIANT 1 VARDIM TYPE FILTER

This field refers to the field on FastTab **General** where you have set the value *Variant 1* in either **Detailed By** or **Group By 1, 2 or 3**.

VARIANT 2 VARDIM TYPE FILTER

This field refers to the field on FastTab **General** where you have set the value *Variant 2* in either **Detailed By** or **Group By 1, 2 or 3**.

VARIANT 3 VARDIM TYPE FILTER

This field refers to the field on FastTab **General** where you have set the value *Variant 3* in either **Detailed By** or **Group By 1, 2 or 3**.

SEARCH IN VARDIM ORDER

The setting of this field will only affect the performance by Statistics generation.

If you do not use VarDim Orders at all or if you know the current **Setup No.** does not need the VarDim Types used in your VarDim Orders, leave this field unmarked.

If you do need the VarDim Types of your VarDim Orders to get a correct Sales Statistics, it is important that you set a check mark here.

FASTTAB ADVANCED

Advanced	
Data Source	Real-time
Cache	☐
Default for Analytics	☒
Unit Cost	Document Line

DATA SOURCE

In this field, you can determine which Data your Statistics should be calculated on.

You can choose between the following options:

Real-time	The report will calculate the Quantities/Amounts based on all the options and filters used with Real-time Data.
Statistic Data	The report will calculate the Quantities/Amounts based on all the options and filters but instead of Real-time data, the Statistics calculation will use data from the Statistics Data table. See more about storing of Statistics Data in Statistics Data Query .

CACHE

When clicking the **AssistEdit** of this field, you can determine if the Cache for this Statistic should be deleted.

DEFAULT FOR ANALYTICS

With a checkmark in this fields, you can determine that the **Setup No.** can also be chosen for the **Sales Analytics** as a default Setup. In that case, the settings will be copied into the **Sales Analytics**.

See chapter [Sales Analytics](#) for more details.

UNIT COST

This field is not by default visible in the page. You can add it via **Personalize**.

In case one of the **Columns 1 – 4** include the **Cost LCY** or **Cost**, you can determine how this Unit Cost should be calculated.

You can choose between the following two options:

Document Line	The Unit Cost will be determined based on the Unit Cost from the Sales (Order, Posted Credit Memo, Posted Invoice) Line.
Adjusted Unit Cost	The Unit Cost will be determined based on the current Unit Cost of the Items. This can be essential if you did enter/post a Sales Line before a (FIFO) Unit Cost could be determined.

FASTTAB PRINT

Print

Print as Matrix ☒

PRINT AS MATRIX

Here you have the possibility to decide whether the first column of the first Data Series line should be shown in Lines or in a Matrix.

This will only have effect if **Detailed By** is set to *Item* and you will only see the first Data Series line.

Do also keep in mind that the matrix does not necessarily show Quantities. It will show what you have set up for **Column 1** so if it is set to *Amount LCY*, the values in the matrix are Sales Amounts.

REPORT ACTIONS

Process

Reports
More options

Statistics
Print
E-Mail
Show Chart
Show Gauge
Excel Formatted
Excel List

Examples shown in the following outputs are based on the following **Setup No.:**

Extended Sales Statistics Setup | Work Date: 9/6/2020

Saved

TEST1

Process
Reports
More options

General

Setup No. TEST1

Name Posted in Last Year and Current Year

Status Active

Specification

Calculated Value Revenue

Detailed By Item

Group By 1 Master

Group By 2 Sell-to Customer No.

Group By 3 Country/Region

Top-down

Top-down Value

Top-down Number 0

Show Others in Total

Misc.

Default by Page Action Page

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code

Show in Alternative Currency USD

Data Series

Manage

New Line
Delete Line
Setup/Filter

Series Label	Include Sales Orders	Include Sales Import Lines (www)	Include Sales Credit Invoices	Include Sales Credit Memos	Start Date	End Date	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge as	Filters	Context Filters
→ Last Year							-CY-1Y	-CY-1D	Quantity	Amount	Cost LCY	GM				
This Year							-CY	CY	Quantity	Amount	Cost LCY	GM				

STATISTICS

The page action **Statistics** will calculate the statistics according to all the setup fields and show the result on the screen.

Sales Statistics | Work Date: 9/6/2020

Saved

Request Param.

Request No. TEST1

Data Source Real-time

Data Source DateTime 4/19/2022 9:27 AM

Global Filters Intercompany: No

Series 1 Last Year - Date: 01/01/19..12/31/19

Series 2 This Year - Date: 01/01/20..12/31/20

Print
E-Mail
Show Chart
Show Gauge
Excel Formatted
Show in Analytics
More options

Code	Description	Quantity [1]	Amount USD [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount USD [2]	Cost GBP [2]	GM [2]
DK	Denmark	2	183	34	71	661	81,855	15,399	71
> 2020	Sportswear A/S DK-8800 Viborg	0	0	0	0	661	81,855	15,399	71
> CW00020	Anders L. Krogh 8840 Redkarsbro	2	183	34	71	0	0	0	0
> 2000	Olivia Trousers	1	90	13	78	0	0	0	0
> 20002042	Olivia Trousers Royal Blue.42	1	90	13	78	0	0	0	0
> 2010	Amelia Trousers	1	93	21	65	0	0	0	0
> 20109942	Amelia Trousers Black.42	1	93	21	65	0	0	0	0
GB	Great Britain	339	20,851	4,199	69	4,056	326,718	126,195	41
> 10000	The Cannon Group PLC B27 4KT Bir...	0	0	0	0	527	44,235	14,597	49
> 2000	The Fashion Store UK WC1 3DG Lon...	330	18,305	4,186	65	1,566	89,473	27,867	52
> 2100	Lily Blouse	330	18,305	4,186	65	405	22,462	5,175	65
> 21002002	Lily Blouse Royal Blue.S	10	555	119	67	2	111	24	67
> 21002003	Lily Blouse Royal Blue.M	20	1,109	244	66	3	166	37	66

If one of the Columns was set to **Amount**, and you did choose a **Show in Alternative Currency**, you will see that currency in the **Amount** columns: **Amount USD** in this example

Via clicking the **Toggle Expand / Collapse All**, you can expand or collapse all the groupings of the statistics. But you can also click on every level, to Expand/Collapse that specific level:

Code	Description	Quantity [1]	Amount GBP [1]	Discount GBP [1]	Budget Amount [1]	Quantity [2]	Amount GBP [2]	Discount GBP [2]	Budget Amount [2]
1964-W	INNSBRUCK Storage Unit/G.Door	0	0	0	0	10	2,920	0	0
1968-S	MEXICO Swivel Chair, black	0	0	0	0	3	351	19	0
1996-S	ATLANTA Whiteboard, base	0	0	0	0	7	6,030	317	0
70011	Glass Door	0	0	0	0	5	362	0	0
2000	The Fashion Store UK WC1 3...	330	11,880	0	0	0	0	0	0
2100	Lily Blouse	330	11,880	0	0	0	0	0	0
21002002	Lily Blouse Royal Blue.S	10	360	0	0	0	0	0	0
21002003	Lily Blouse Royal Blue.M	20	720	0	0	0	0	0	0
21002004	Lily Blouse Royal Blue.L	20	720	0	0	0	0	0	0
21002005	Lily Blouse Royal Blue.XL	10	360	0	0	0	0	0	0
21002006	Lily Blouse Royal Blue.XXL	5	180	0	0	0	0	0	0
21003502	Lily Blouse Orange.S	11	396	0	0	0	0	0	0
21003503	Lily Blouse Orange.M	21	756	0	0	0	0	0	0
21003504	Lily Blouse Orange.L	21	756	0	0	0	0	0	0
21003505	Lily Blouse Orange.XL	11	396	0	0	0	0	0	0

Sales Statistics | Work Date: 9/6/2020
Saved

Request Param.
Request No. : TEST1
Data Source : Real-time
Data Source DateTime : 2/15/2023 10:25 AM

Global Filters : Intercompany: No
Series 1 : Last Year - Date: 01/01/19..12/31/19
Series 2 : Current Year - Date: 01/01/20..12/31/20

Print E-Mail Show Chart Show Gauge Excel Formatted Show in Analytics

From this screen view, you can continue to use the other outputs of the statistics.

If you add filters to the Data Series, they will be shown at the top of the page. Filters valid for both series are shown in the **Global Filters** field and filters only valid for a specific series are shown in the **Series 1** or **Series 2** where they belong.

i.e.

SALES STATISTICS SETUP HEADER | WORK DATE: 10-9-2020
TEST_1
Process Report Actions Fewer options

General >

Data Series Manage
New Line Delete Line Setup/Filter

Last Year This Year

TEST_1 · 10000
General >

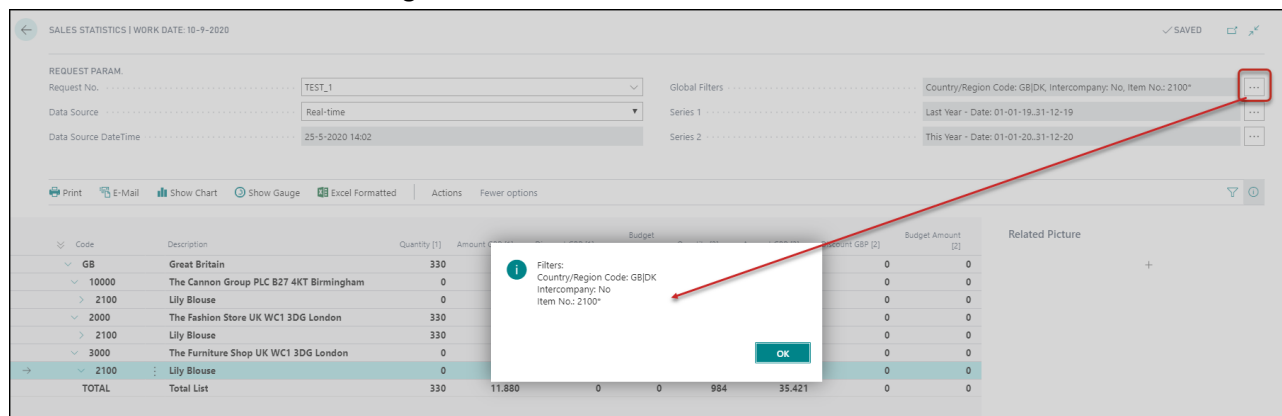
Filters

GENERAL FILTERS
Filter Document Type
Filter Document No.
Filter Sales Channel
Filter Order Type
Filter Collection No.
Filter Period Code
Brand Filter
Season Filter
Filter Location Code
Filter Currency Code
Filter Return Reason Code
Filter Intercompany
Filter Complaint

CUSTOMER RELATED
Filter Sell-to Customer No.
Filter Bill-to
Filter Company Group
Filter Chain
Filter Salesperson
Filter Salesperson 2
Filter Salesperson 3
Filter Territory
Filter Country/Region Code
Filter Sell-to Group
Filter Sell-to Type
Filter Statistics Group

ITEM RELATED
Filter Item No. 2100*
Filter VarDim Y-Axis
Filter Master No.
Filter Group Master
Filter Product Family
Design Filter
Design Filter
Gender Filter
Item Statistics Group 4 Filter
Item Statistics Group 5 Filter
Filter Item Category Code
Filter Forecast Item
Filter Tariff Position
Filter Primary Vendor

If we for instance set two filters in Series 1 and no filters in Series 2, Series 2 will inherit the filters from Series 1. Then the two filters are global.



In case you cannot see all filters in the field, you can use the AssistEdit of the field to see a list of all set filters.

PRINT

With the page action **Print**, you can print the Statistics on paper. When you click the action **Print**, you will go to the **Extended Sales Statistics** report where all fields are filled based on the setup of the **Setup No.** you come from. Although you do not see all setup fields in the setup for the **Extended Sales Statistics** report, they will be valid for the Statistics calculation.

In the **Setup No.** on the FastTab *Request*, you can see which **Sales Statistics Setup No.** you come from. See more details in the chapter [Extended Sales Statistics Report](#).

E-MAIL

With the page action **E-Mail**, you can calculate the Statistics according to all the setup fields and send it to a recipient (user or salesperson) via E-Mail.

Learn more about use of E-Mail in the **White Paper – TRIMIT E-Mail**.

SHOW CHART

This action can only be used if your system includes one of the TRIMIT Portals.

With the page action **Show Chart**, you can calculate the Statistics according to all the setup fields and show it as a chart. You can read about the setup parameters regarding charts in [FastTab Charts](#).

SHOW GAUGE

This action can only be used if your system includes one of the TRIMIT Portals.

With the page action **Show Gauge**, you can calculate the Statistics according to all the setup fields and show it as a Gauge. You can read about the setup parameters regarding Gauges in [FastTab Gauge](#).

EXCEL FORMATTED

With the page action **Excel Formatted**, you can calculate the Statistics according to all the setup fields and export it to an Excel workbook. The Excel Sheet will be formatted with the same Data sets and Columns as set up in the fields and extended with Columns indicating which **Group By** values the Lines are related to.

ITEM STATISTICS																		S
Date 04/19/22																		
Country/Region	Sell to Customer No		Text	Master Text	Item	Text	Last Year - 01/01/19-12/31/19				This Year - 01/01/20-12/31/20							
							Quantity	Amount USD	Cost GBP	GM	Quantity	Amount USD	Cost GBP	GM				
183 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H105 Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	3	457,75	79,84	73,1				
186 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H110 Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	3	480,87	80,65	74,2				
187 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H115 Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	2	320,58	54,18	74				
188 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H120 Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	2	320,58	54,14	73				
189 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H125 Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	1	160,29	28,28	72,8				
190 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H130 Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	1	160,29	28,48	72,6				
191 DK	Denmark	CW00020	Anders L Krogh 8840 Radkersbrø	2000	Olivia Trousers	20002042 Olivia Trousers Royal Blue,42	1	90,01	13,27	77,9	0	0	0	0				
192 DK	Denmark	CW00020	Anders L Krogh 8840 Radkersbrø	2010	Amelia Trousers	20109942 Amelia Trousers Black,42	1	92,89	21,41	64,5	0	0	0	0				
193 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1920-S	ANTWERP Conference Table	0	0	0	0	1	647,94	328	22				
194 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1964-W	INNSBRUCK Storage Unit/G.Door	0	0	0	0	10	4500,45	1714	41,3				
195 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1968-S	MEXICO Swivel Chair, black	0	0	0	0	5	902,66	480,5	18				
196 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1996-S	ATLANTA Whiteboard, base	0	0	0	0	7	9293,06	4950,4	17,9				
197 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	70011	Glass Door	0	0	0	0	5	557,16	184,5	49				
198 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	15-150	Loudspeaker, Cherry, 150W	0	0	0	0	10	1988,21	720	44,2				
199 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	LS-MAN-10	Manual for Loudspeakers	0	0	0	0	14	0	168	0				
200 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003002 Lily Blouse Yellow,S	0	0	0	0	25	1386,74	297,75925	66,9				
201 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003003 Lily Blouse Yellow,M	0	0	0	0	50	2773,48	610,049	66,1				
202 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003004 Lily Blouse Yellow,L	0	0	0	0	50	2773,48	639,11	64,5				
203 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003005 Lily Blouse Yellow,XL	0	0	0	0	50	2773,48	668,171	62,9				
204 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003006 Lily Blouse Yellow,XL	0	0	0	0	25	1386,74	348,616	61,3				

EXCEL LIST

With the page action **Excel List**, you can calculate the Statistics according to all the setup fields and export it to an Excel workbook. The Excel Sheet will contain all Columns that can be chosen as values in the setup of **Column 1-4** with no regards to which values are chosen for the Columns in the setup.

The different data series will be represented by different rows in the Excel Sheet.

ITEM STATISTICS																		S						
Date 04/19/22																								
Series	Country/Region	Text	Sell-to Customer	Text	Master	Item	Text	Quantity	Net Amount	LCY	Cost Amount	LCY	Discount Amount	Net Amount	Cost Amount	Discount Amount	Budget Qty.		Budget Amount	LCY	Budget Cost	LCY	Net Gross	V. Volume
183 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H105	Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	183 DK	
186 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H110	Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
187 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H115	Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
188 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H120	Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
189 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H125	Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
190 DK	Denmark	2020	Sportswear A/S DK-8800 Viborg	4700	Roger Brogue	4700004011H130	Roger Brogue Cognac,Smooth,Leather,f	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
191 DK	Denmark	CW00020	Anders L Krogh 8840 Radkersbrø	2000	Olivia Trousers	20002042	Olivia Trousers Royal Blue,42	1	90,01	13,27	77,9	0	0	0	0	0	0	0	0	0	0	0		
192 DK	Denmark	CW00020	Anders L Krogh 8840 Radkersbrø	2010	Amelia Trousers	20109942	Amelia Trousers Black,42	1	92,89	21,41	64,5	0	0	0	0	0	0	0	0	0	0	0		
193 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1920-S	ANTWERP Conference Table	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
194 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1964-W	INNSBRUCK Storage Unit/G.Door	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
195 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1968-S	MEXICO Swivel Chair, black	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
196 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	1996-S	ATLANTA Whiteboard, base	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
197 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	70011	Glass Door	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
198 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	15-150	Loudspeaker, Cherry, 150W	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
199 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	Master [blank]	LS-MAN-10	Manual for Loudspeakers	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
200 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003002	Lily Blouse Yellow,S	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
201 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003003	Lily Blouse Yellow,M	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
202 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003004	Lily Blouse Yellow,L	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
203 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003005	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
204 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003006	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
205 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003007	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
206 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003008	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
207 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003009	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
208 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003010	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
209 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003011	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
210 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003012	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
211 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003013	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
212 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003014	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
213 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003015	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
214 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003016	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
215 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003017	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
216 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003018	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
217 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003019	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
218 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003020	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
219 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003021	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
220 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003022	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
221 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003023	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
222 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003024	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
223 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003025	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
224 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003026	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
225 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003027	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
226 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003028	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
227 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003029	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
228 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003030	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
229 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003031	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
230 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003032	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
231 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003033	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
232 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003034	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
233 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003035	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
234 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003036	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
235 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003037	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
236 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003038	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
237 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003039	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
238 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003040	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
239 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003041	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
240 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003042	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
241 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003043	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
242 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003044	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
243 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003045	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
244 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003046	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
245 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003047	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
246 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003048	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
247 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003049	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
248 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003050	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
249 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003051	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
250 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003052	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
251 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003053	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
252 GB	Great Britain	10000	The Cannon Group PLC B27 4KT Birmingham	2100	Lily Blouse	21003054	Lily Blouse Yellow,XL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
2																								

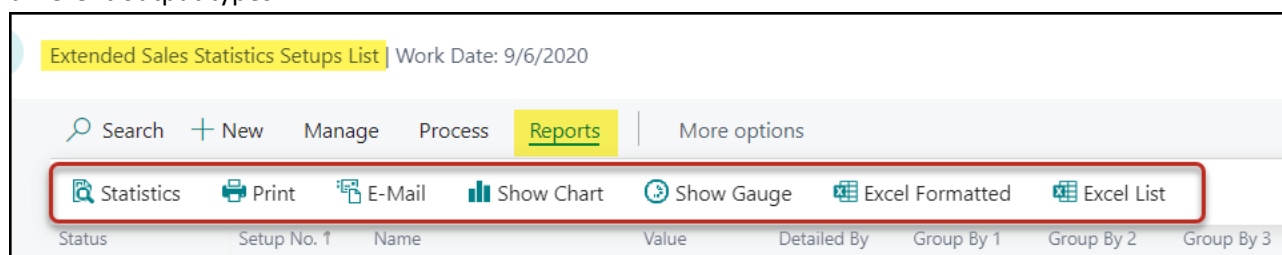
HOW TO USE EXTENDED SALES STATISTICS SETUP NOS.

There are four ways of using the **Sales Statistics Setup Nos.**:

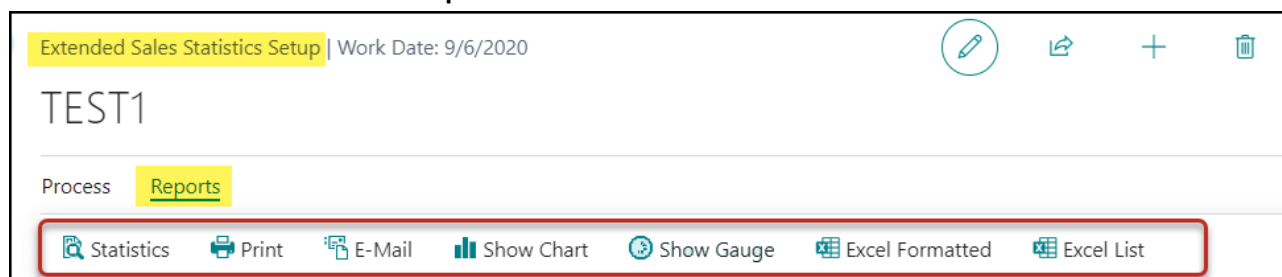
1. Via the [Extended Sales Statistics Setup Nos.](#)
2. Via the [Extended Sales Statistics Report](#)
3. In a [Statistics Overview](#)
4. As [Context Driven Statistics](#)

VIA EXTENDED SALES STATISTICS SETUP LIST

In the **Extended Sales Statistics Setup List**, you can click one of the actions [Statistics](#), [Print](#), [E-Mail](#), [Show Chart](#), [Excel Formatted](#) or [Excel List](#) to execute the Statistics. Follow the links to read more about the different output types.

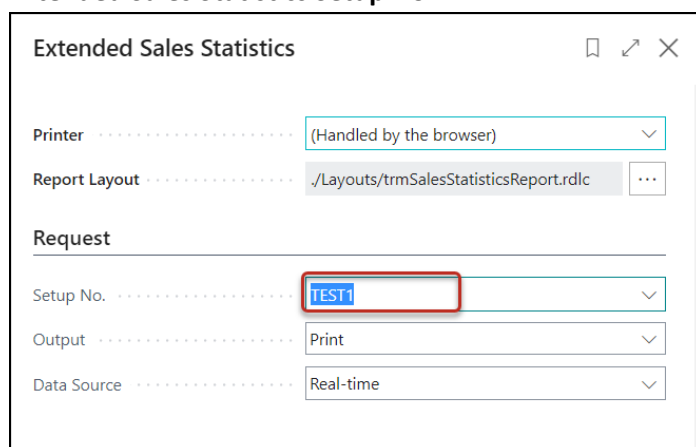


If you click **+ New** or **Manage, Edit** or **Manage, View**, you will see that the output actions are also available in the **Extended Sales Statistics Setup**.



VIA EXTENDED SALES STATISTICS REPORT

In the [Extended Sales Statistics](#) report, you have the FastTab **Request** in which you can enter a predefined **Extended Sales Statistics Setup No.**:



This means that all the fields in the **Extended Sales Statistics Setup No.** will overwrite all previously entered fields and filters in the **Extended Sales Statistics** report.

However, field values and filters changed or added afterwards will apply to the report. However, be aware that filters from the **Setup No.** are not shown in the FastTab **Filter Series 1** and **2** in the **Extended Sales Statistics** report, so you can by mistake overwrite filters from the Setup No. while you think you are just adding a new filter.

IN STATISTICS OVERVIEW

This is only applicable if your system includes one of the TRIMIT Portals.

In a **Statistics Overview**, you can combine several **Extended Sales Statistics Setup Nos.** to see them in a single view on the screen.

You can for instance choose three of **Extended Sales Statistics Setup Nos.** and combine them in one **Statistics Overview**.

SALES STATISTICS SETUPS LIST

Search

+ New

Manage

Report

Show Attached

Open in Excel

Actions

Less options

	STATUS	SETUP NO.	NAME	CALCULA... VALUE	DETAILED BY	GROUP BY 1	GROUP BY 2	GROUP BY 3	DEFAULT BY PAGE ACTION	DATA SOURCE	AL... ON PO...	DATA SERIES	FILTE...	CONT... FILTE...	CACHE	DRILL DOWN CODE
	Active	BASKET01	Size Split	Revenue	Variant 2				Page	Real-time	☒		1 Yes	Yes	No	
	Active	BASKET02	Amount Per Product Type	Revenue	Master	Item Statisti...			Page	Real-time	☒		1 Yes	Yes	No	
	Active	BASKET03	Budget Follow-Up	Revenue	Sell-to Cust...				Page	Real-time	☒		2 Yes	Yes	No	
	Active	CHANNEL	Revenue / Channel	Revenue	Sales Channel				Page	Statistic Data	☐		1 No	No	Yes	
	Active	COUNT_SPLIT	Country Split	Revenue	Country/Reg...				Chart	Statistic Data	☒		2 No	No	Yes	DRILLDOWN
	Active	COUNTRSEAS	Invoiced per Country/Seaso...	Revenue	Global Dime...	Country/Reg...			Page	Statistic Data	☐		1 No	No	No	
	Active	COUNTRY	Open Orders per Country (+...	Order Intake	Country/Reg...				Page	Statistic Data	☐		1 No	No	No	
	Active	COUNTRYCUS	Invoiced per Country/Custo...	Revenue	Sell-to Cust...	Country/Reg...			Page	Statistic Data	☐		1 No	No	No	
	Active	CUST10	Customer Top 10	Revenue	Sell-to Cust...				Page	Statistic Data	☒		1 No	No	Yes	
	Active	CUSTOMER	Open Orders per Customer ...	Order Intake	Sell-to Cust...				Page	Statistic Data	☐		1 No	No	No	
	Active	CUSTOMEREX	Expected Revenue per Cust...	Revenue	Sell-to Cust...				Chart	Statistic Data	☐		4 No	No	No	
	Active	CUSTSEASON	Open Orders per Customer/...	Order Intake	Global Dime...	Sell-to Cust...			Page	Statistic Data	☐		1 No	No	No	
	Active	DRILLDOWN	Drill Down	Revenue	Master	Sell-to Cust...			Page	Real-time	☒		0 No	No	No	
	Active	DRILLDOWN...	DrillDown Master	Revenue	Variant 1				Page	Real-time	☒		0 No	No	No	

Open the **Statistics Overview List** (via **Search**), create a new **Code** and enter the three **Extended Sales Statistics Setup Nos.** you want to see in one overview.

Statistics Overview | Work Date: 9/6/2020

Save

Share

Print

Refresh

TEST_OVERVIEW_1 · Overview_1

Show Overview

General

Code

TEST_OVERVIEW_1

Name

Overview_1

Lines

Manage

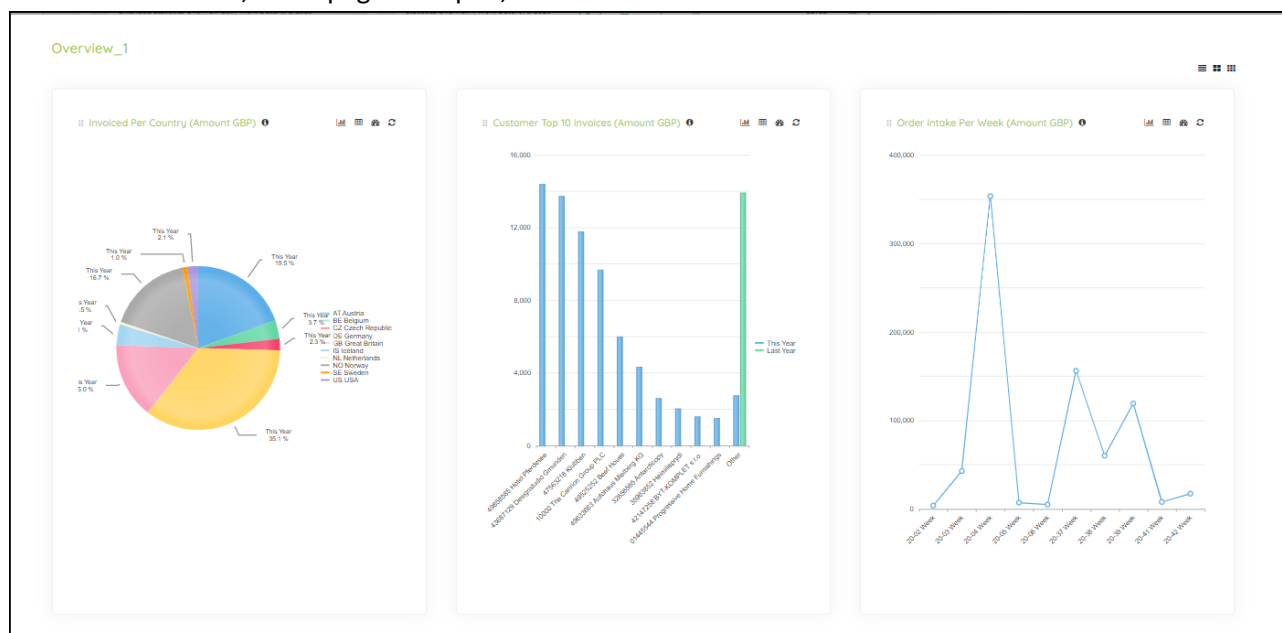
Output

Fewer options

Type	Setup No.	Description	Default Output
Sales Statistics	COUNTRY-SPLIT	Invoiced per Country	Chart
Sales Statistics	CUSTOMERTOP10	Customer Top 10 Invoices	Chart
Sales Statistics	ORDERINT	Order Intake per Week	Chart

The **Code** can not have the same name as one of the **Extended Sales Statistics Setup Nos.**
The **Default Output** can only be *Chart* or *Gauge*.

Via **Show Overview**, a webpage will open, and the three Charts will be shown.



AS CONTEXT DRIVEN STATISTICS

Context Driven Statistics are Statistics using filter values taken from the record from which it is run.

When an **Extended Sales Statistics Setup No.** is going to be used in context with a specific Record, the filters of the **Data Series** must be set up in a distinct way.

Let us say that the record contains a **Sell-to Customer No.**, and you want the Statistics to be shown filtered on this number. Then enter an = sign instead of a specific Customer No. into the **Filter Sell-to Customer No.** field and the Statistics output will be filtered on the **Sell-to Customer No.** of the record it is run from.

For this example, *Deactivate* the Sales Statistics Setup *CUSTOMEREX*.

Make sure that the **Default by Page Action** in the Sales Statistics Setup is set to *Page*.

Extended Sales Statistics Setup | Work Date: 9/6/2020

✓ Saved

CUSTOMEREX

Process Reports

General

Setup No.

CUSTOMEREX

Name

Expected Revenue per Customer (+/- 6M)

Status

Deactivated

Specification

Calculated Value

Revenue

Detailed By

Sell-to Customer No.

Group By 1

Group By 2

Group By 3

Top-down

Top-down Value

Top-down Number

0

Show Others in Total

☐

Misc.

Default by Page Action

Page

Allow on Portals

☐

Show Picture

☐

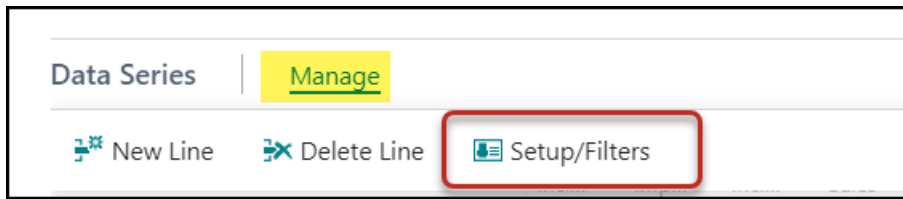
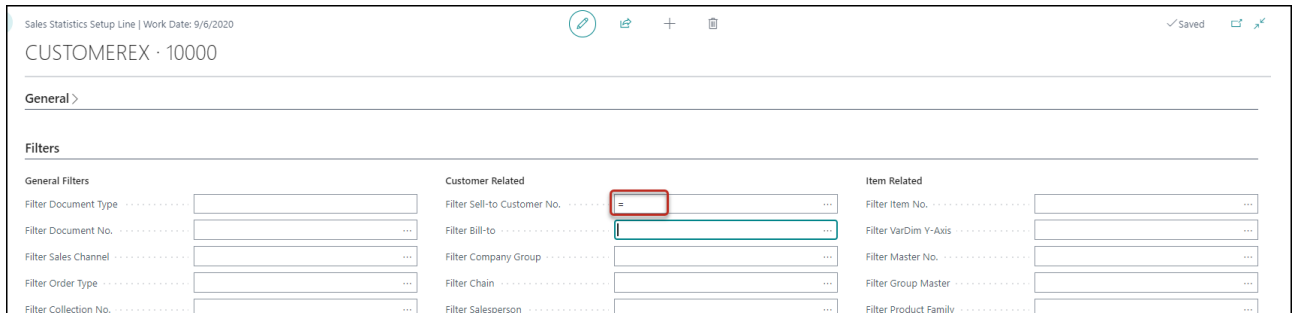
Explode Assortment

☐

Drill Down Code

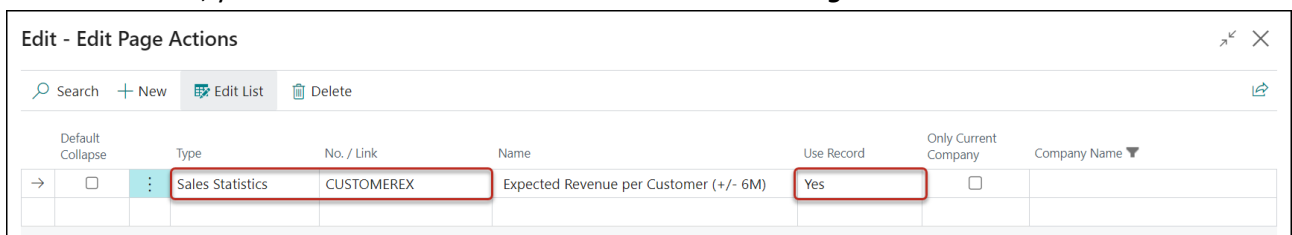
Show in Alternative Currency

And you enter the Filter for **Filter Sell-to Customer No.** to =.

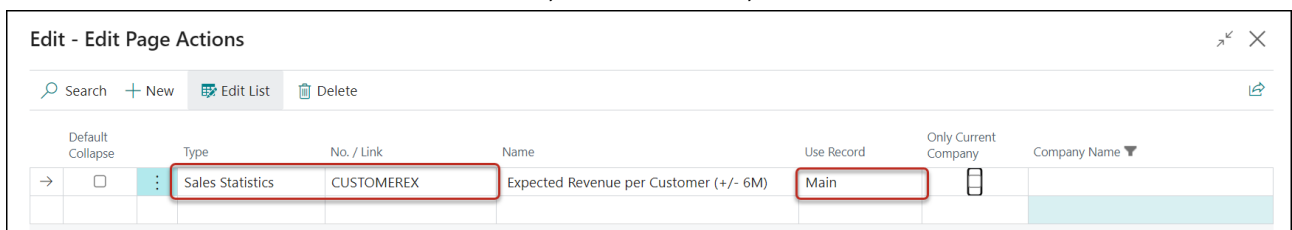



Do not forget to *Activate* the Setup again.

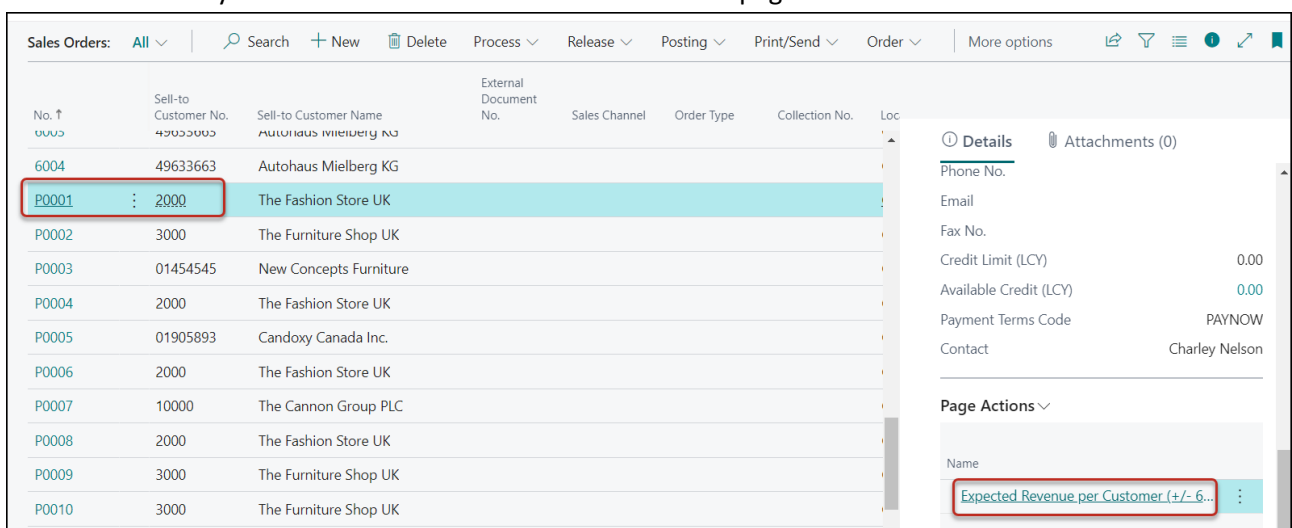
A record containing a **Sell-to Customer No.** could be a Sales Order. To enable view of this Statistics from the Sales Orders List, you will need to add the statistics in the FactBox **Page Actions**.



You could also do this to the Sales Order Card, but in that case, it should be with **Use Record Main**.



You are now ready to run the statistics from the Sales Orders page.



Sales Statistics | Work Date: 9/6/2020
✓ Saved

Request Param.
Request No. CUSTOMEREX
Data Source Real-time
Data Source DateTime 2/15/2023 11:07 AM

Global Filters
Intercompany: No
Sell-to Customer No.: 2000
Series 1 - Date: 03/06/20..06/06/20
Series 2 - Date: 06/06/20..09/06/20

Print E-Mail Show Chart Show Gauge Excel Formatted Show in Analytics

Code	Description	Cost GBP [1]	Amount GBP [1]	GM [1]	Quantity [1]	Cost GBP [2]	Amount GBP [2]	GM [2]
2000	The Fashion Store UK WC1 3DG London	880	1,569	44	40	0	0	0
TOTAL	Total List	880	1,569	44	40	0	0	0

You can also run a [Statistics Overview](#) from the FactBox.

Edit - Edit Page Actions
✕

Search + New Edit List Delete

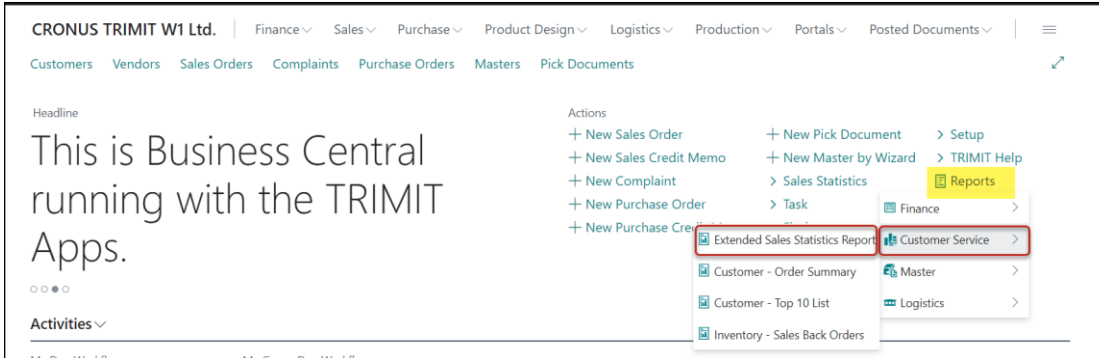
Default Collapse	Type	No. / Link	Name	Use Record	Only Current Company	Company Name ▼
☐	Sales Statistics	CUSTOMEREX	Expected Revenue per Customer (+/- 6M)	Yes	☐	
→ ☐	Statistics Overview	TEST_OVERVIEW_1	Overview_1	Yes	☐	

But it might still give you a Statistics not only based on the Sales Order, because you did not set the **Filters** in the individual **Extended Sales Statistics Setup Nos.**

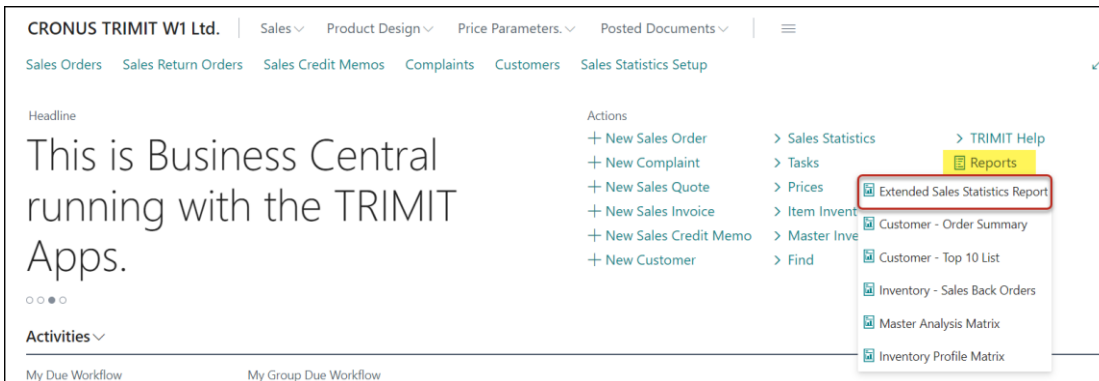
EXTENDED SALES STATISTICS REPORT

The **Extended Sales Statistics** report can be found via several options:

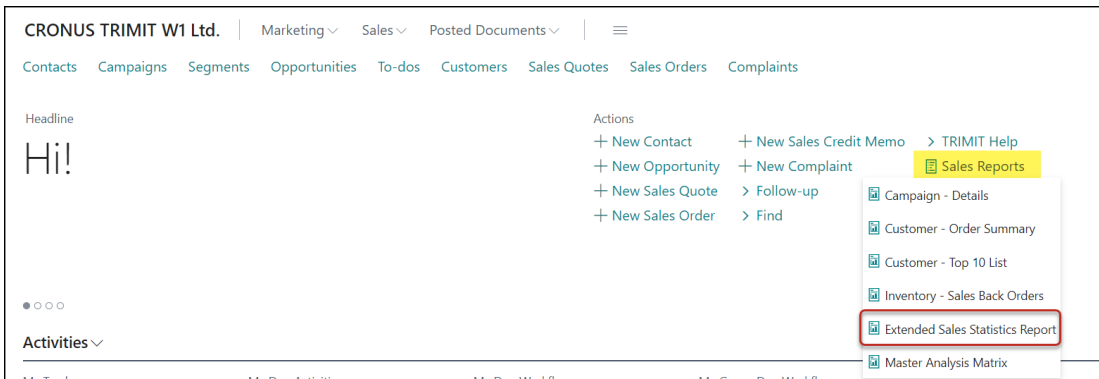
In the **TRIMIT Small Business** Role Center, you can start it via:



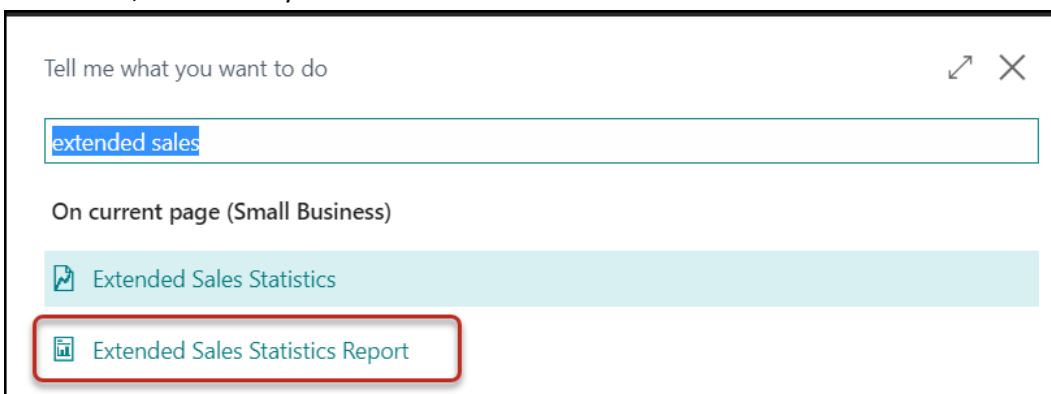
In the **TRIMIT Customer Service** Role Center, you start it via:



In the **TRIMIT CRM** Role Center, you can start it via:



In addition, via **Search**, you can find it as well:



In the **Extended Sales Statistics** report, you can set up Statistics that you only want to run for a single time and where you do not need the additional setup fields available from the **Extended Sales Statistics Setup List**. The **Extended Sales Statistics** report is also used when you want to print a **Setup No.** or just see it on the screen in print format. If you select the page action **Print** from the **Extended Sales Statistics Setup** or from a **Setup No.** in the **Extended Sales Statistics Setup List**, the **Extended Sales Statistics** report is automatically opened with all the settings from the Setup No.

You can also open the **Extended Sales Statistics** report yourself and just enter the parameters and filters for a Statistics you want to create.

FASTTAB REQUEST

Extended Sales Statistics

Printer
(Handled by the browser)

Report Layout
./Layouts/trmSalesStatisticsReport.rdlc

Request

Setup No.

Output
Print

Data Source
Statistic Data

SETUP NO.

Here you can just enter one of the Setup Nos. from the **Extended Sales Statistics Setup List** and you will automatically activate all the filters and settings from that Setup No.

OUTPUT

Here you can enter the **Output** for your statistics:

You can choose between *Print*, *Excel List*, *Excel Formatted*, *Page* and *E-Mail*.

For details regarding this field see the description in [Default Output to](#)

DATA SOURCE

For details regarding this fields see the description in [Data Source](#).

NOTE

The buffer for the **Statistic Data** can be updated regularly by using a Job Queue or via the action **Refresh Statistics Data** in the **Extended Sales Statistics Setup No.**

FASTTAB SPECIFICATION

Specification

Calculated Value
Revenue

Detailed By
Sell-to Customer No.

Group By 1

Group By 2

Group By 3

Print as Matrix
☒

CALCULATED VALUE

For details regarding this field see the description in [Calculated Value](#).

DETAILED BY

For details regarding this field see the description in [Detailed By](#).

GROUP BY 1, 2 & 3

For details regarding these fields see the description in [Group By 1, 2 & 3](#).

PRINT AS MATRIX

For details regarding this fields see the description in [Print as Matrix](#).

FASTTAB SERIES 1 & 2

Series 1

Include Sales Orders

Include Sales Invoices

Include Sales Credit Memos

Include Sales Import Lines (www)

Start Date

End Date

Columns

Print Period 1 Column 1

Quantity

Print Period 1 Column 2

Amount LCY

Print Period 1 Column 3

Discount LCY

Print Period 1 Column 4

Budget Amount

The same descriptions are valid for the fields of FastTab **Series 1** and FastTab **Series 2**.

INCLUDE SALES ORDERS

For details regarding this field see the description in [Include Sales Orders](#).

INCLUDE SALES INVOICES

For details regarding this field see the description in [Include Sales Invoices](#).

INCLUDE SALES CREDIT MEMOS

For details regarding this field see the description in [Include Sales Credit Memos](#).

START DATE

For details regarding this field see the description in [Start Date](#)

END DATE

For details regarding this field see the description in [End Date](#).

COLUMNS

For details regarding the column's setup, see the description in [Column 1, 2, 3 and 4](#).

FASTTAB FILTER SERIES 1 & 2

Filter: Filter Series 1

× Filter Sell-to Customer No.

× Filter Salesperson

× Filter Country/Region Code

× Filter Item No.

× Filter Master No.

× Filter Group Master

× Filter Sales Channel

× Filter Order Type

× Filter Collection No.

+ Filter...

As the same description is valid for FastTab **Filter Series 1** and FastTab **Filter Series 2**, both series are described in this paragraph.

You can filter on 40 different **General**, **Customer Related** and **Item Related** filters. By default, 9 of the filters are available on the FastTab and you can change those for the remaining 31 that are necessary for your current analysis. Note that only those of the following where “filter” is part of the name can be used:

When you enter filters into the first Data Series (**Filter Series 1**), they will be inherited to the next Data Series, but only if no filters are set there.

EXTENDED SALES STATISTICS EXAMPLES

EXPECTED REVENUE PER CUSTOMER/MASTER

For this, you can create following **Extended Sales Statistics Setup No.** This Statistic will include Posted Sales Invoices (based on Posting Date), Sales Orders and Sales Import Lines (based on Shipment Date):

SALES STATISTICS SETUP HEADER

EXP_CUST_MASTER

Process

Report

Show Attached

Actions

Less options

Statistics

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Excel List

General

Setup No.

EXP_CUST_MASTER

TOP DOWN

MISC.

Name

Expected Revenue per Customer/Master

Top Down Value

Default by Page Action

Page

Status

Active

Top Down Number

0

Allow on Portals

SPECIFICATION

Calculated Value

Revenue

Show Others in Total

Detailed By

Master

Show Picture

Group By 1

Sell-to Customer No.

Explode Assortment

Group By 2

Drill Down Code

Group By 3

Data Series

Manage

New Line

Delete Line

Setup/Filters

SERIES LABEL	INC... SAL... ORD...	INC... IMP... LIN... (W...	INC... SAL... INV...	INC... SAL... CRE... ME...	START DATE FORMULA	END DATE FORMULA	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	FILTER SALES BUDGET	USE IN GAUGE AS	FILT...	CO... FILT...
Current Month	☒	☒	☒	☐	-CM	CM-1D	Quantity	Amount LCY	Cost	GM			☒	☐
Next Months this year	☒	☒	☒	☐	CM+1D	CY-1D	Quantity	Amount LCY	Cost	GM			☒	☐

SALES STATISTICS PAGE

Request No.

EXP_CUST_MASTER

Series 1

Current Month - Date: 01-01-19..30-01-19

Data Source

Real-time

Series 2

Next Months this year - Date: 01-02-19..30-12-19

Global Filters

Intercompany: No, Sell-to Customer No.: 2*3*

Manage

Process

Actions

Less options

Expand All

Collapse All

CODE	DESCRIPTION	QUANTITY [1]	AMOUNT GBP [1]	COST [1]	GM [1]	QUANTITY [2]	AMOUNT GBP [2]	COST [2]	GM [2]
2000	The Fashion Store UK WC1 3DG Lond...	770	12.793	9.894	23	132	2.930	1.104	62
2110	Sweater Long Sleeve	660	10.211	8.851	13	0	0	0	0
2120	Ladies Blouse	86	1.742	712	59	0	0	0	0
2210	Ski Jack	0	0	0	0	48	1.488	497	67
2310	Coverall Viscose	0	0	0	0	51	536	246	54
2820	Trouser Folded	0	0	0	0	24	546	186	66
2830	Jacket Hanging	24	840	331	61	0	0	0	0
2840	Sweater Own Production Hanging	0	0	0	0	9	360	175	51
20000	Selangorlan Ltd. CV6 1GY Coventry	163	9.200	5.837	37	0	0	0	0
MASTER [B...	Master (blank)	163	9.200	5.837	37	0	0	0	0
2010	The Shoe Store Europe NL-1009 AG ...	42	732	538	53	1.379	121.305	37.217	80
2120	Ladies Blouse	42	732	538	53	0	0	0	0
2700	Men's Brogue	0	0	0	0	1.350	120.603	36.758	80
2820	Trouser Folded	0	0	0	0	17	322	203	59
2830	Jacket Hanging	0	0	0	0	12	380	256	56
2020	Sportswear A/S DK-8800 Viborg	21	429	352	47	495	44.221	13.536	80
2135	Polo Shirt Sizes and Assortments	21	429	352	47	0	0	0	0
2700	Men's Brogue	0	0	0	0	495	44.221	13.536	80

INCOMING ORDERS PER CUSTOMER WITH SUBTOTALS PER SALESPERSON

For this, you can create following **Extended Sales Statistics Setup No.**

SALES STATISTICS SETUP HEADER

+

INC_CUST_SALESP

[Process](#)
[Report](#)
[Show Attached](#)
[Actions](#)
[Less options](#)

Activate

Make Inactive

General

Setup No.

INC_CUST_SALESP

TOP DOWN

Top Down Value

Top Down Number

0

Show Others in Total

☐

MISC.

Default by Page Action

Page

Allow on Portals

☐

Show Picture

☐

Explode Assortment

☐

Drill Down Code

SPECIFICATION

Calculated Value

Order Intake

Detailed By

Sell-to Customer No.

Group By 1

Salesperson

Group By 2

Group By 3

Data Series

Manage

New Line

Delete Line

Setup/Filters

SERIES LABEL	INC... SAL... ORD...	INC... SAL... LIN... (W...	INC... SAL... INV...	INC... SAL... CRE... ME...	START DATE FORMULA	END DATE FORMULA	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	FILTER SALES BUDGET	USE IN GAUGE AS	FILT...	CO... FILT...
Last year	☒	☒	☐	☐	-CY-1Y	-CY-1D	Quantity	Amount LCY	Cost	GM		☐	☐	☐
This year	☒	☒	☐	☐	-CY	CY	Quantity	Amount LCY	Cost	GM		☐	☐	☐

If the parameter **Order Creation Data Statistics** in the Sales & Receivables Setup is set to *Creation Date*, you might not get any output in the demo company.

You need to change this parameter to *Order Date*, to get an output.

SALES STATISTICS PAGE

Request No.

INC_CUST_SALESP

Data Source

Real-time

Global Filters

Intercompany: No, Sell-to Customer No.: 2*3*

Series 1

Last year - Date: 01-01-18..31-12-18

Series 2

This year - Date: 01-01-19..31-12-19

[Manage](#)
[Process](#)
[Actions](#)
[Less options](#)

Expand All

Collapse All

CODE	DESCRIPTION	QUANTITY [1]	AMOUNT GBP [1]	COST [1]	GM [1]	QUANTITY [2]	AMOUNT GBP [2]	COST [2]	GM [2]
SALESPERS...	Salesperson [blank]	0	0	0	0	369	147.574	0	78
20000	Selangorian Ltd. CV6 1GY Coventry	0	0	0	0	155	7.481	4.578	39
2010	The Shoe Store Europe NL-1009 AG Am...	0	0	0	0	71	1.434	998	55
30000	John Haddock Insurance Co. MO2 4RT ...	0	0	0	0	61	9.199	6.433	30
31987987	Candoxy Nederland BV NL-1009 AG Am...	0	0	0	0	18	3.345	3.859	26
32789456	Lovaina Contractors BE-3000 Leuven	0	0	0	0	4	3.314	4.389	15
38128456	MEMA Ljubljana d.o.o. SI-1000 Ljubljana	0	0	0	0	59	122.801	24.465	87
CE	Christine Everton	0	0	0	0	516	44.651	13.887	80
2020	Sportswear A/S DK-8800 Viborg	0	0	0	0	516	44.651	13.887	80
JR	John Roberts	0	0	0	0	3.874	233.042	0	70
2000	The Fashion Store UK WC1 3DG London	0	0	0	0	902	15.722	10.998	30
2010	The Shoe Store Europe NL-1009 AG Am...	0	0	0	0	1.350	120.603	36.758	80
3000	The Furniture Shop UK WC1 3DG London	0	0	0	0	1.622	96.717	36.366	62
TR	Theodor Rudolphs	0	0	0	0	50	1.082	464	57
2030	The Surf Shop Ltd. N12 5XY London	0	0	0	0	50	1.082	464	57
TOTAL	Total List	0	0	0	0	4.809	426.349	0	73

ORDERS OF TODAY INCLUDING MATRIX

For this, you can create following **Extended Sales Statistics Setup No.**

SALES STATISTICS SETUP HEADER

ORDERS_TODAY

Process

Report

Show Attached

Actions

Less options

Statistics

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Excel List

General

Setup No. ORDERS_TODAY

TOP DOWN

MISC.

Name Todays Orders incl. Matrix

Top Down Value

Default by Page Action Page

Status Active

Top Down Number 0

Allow on Portals ☐

SPECIFICATION

Show Others in Total ☐

Show Picture ☐

Calculated Value Order Intake

Explode Assortment ☐

Detailed By Item

Drill Down Code

Group By 1

Group By 2

Group By 3

Data Series | Manage

New Line

Delete Line

Setup/Filters

SERIES LABEL	INCL. SALES LINES ORDE.	INCL. SALES IMPD. LINES (WW.)	INCL. SALES CRED. MEM.	START DATE FORMULA	END DATE FORMULA	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	FILTER SALES BUDGET	USE IN GAUGE AS	FILTE..	CONT.. FILTE..
	☒	☒	☐	☐	CD	CD	Quantity	Amount LCY	Cost	GM		☐	☐

Via **Statistics**, it will not show matrices:

SALES STATISTICS PAGE

Request No. ORDERS_TODAY

Global Filters Date: 24-01-19, Intercompany: No

Data Source Real-time

Series 1

Manage

Process

Actions

Less options

Expand All

Collapse All

CODE	DESCRIPTION	QUANTITY			
1920-S	ANTWERP Conference Table	1	420	328	22
21100102	Sweater Long Sleeve White,S	172	2,321	0	7
21100103	Sweater Long Sleeve White,M	324	4,492	0	8
21100104	Sweater Long Sleeve White,L	344	4,644	0	-2
21100105	Sweater Long Sleeve White,XL	196	2,526	0	-8
21100106	Sweater Long Sleeve White,XXL	100	1,399	0	0
21106002	Sweater Long Sleeve Green,S	22	495	0	44
21106003	Sweater Long Sleeve Green,M	43	710	0	23
21106004	Sweater Long Sleeve Green,L	53	873	0	17
21106005	Sweater Long Sleeve Green,XL	42	690	0	15
21106006	Sweater Long Sleeve Green,XXL	32	528	0	16
21108002	Sweater Long Sleeve Purple,S	21	21	0	-1,148
21108003	Sweater Long Sleeve Purple,M	32	42	0	-869
21108004	Sweater Long Sleeve Purple,L	42	43	0	-1,240
21108005	Sweater Long Sleeve Purple,XL	31	21	0	-1,957
21108006	Sweater Long Sleeve Purple,XXL	20	0	645	0
21109901	Sweater Long Sleeve Black,XS	3	61	37	39
21109902	Sweater Long Sleeve Black,S	215	2,578	0	-4
21109903	Sweater Long Sleeve Black,M	428	5,116	0	-6
21109904	Sweater Long Sleeve Black,L	485	5,840	0	-14
21109905	Sweater Long Sleeve Black,XL	274	3,732	0	-2
21109906	Sweater Long Sleeve Black,XXL	151	2,007	0	-5

However, if you would **Print** it – even with a preview – it would show:

ITEM ORDER INTAKE STATISTICS

CRONUS TRIMIT International Ltd.

Global Filters: Date: 24-01-19, Intercompany: No

20. December 2018

Page 1

CORNATORIKBI

Item	24-01-19								24-01-19			GM	
	Quantity								Quantity	Amount GBP	Cost		
1920-S ANTWERP Conference Table									1	420	328	22	
2110 Sweater Long Sleeve	<u>XS</u>	S	M	L	XL	XXL							
White		172	324	344	195	100			1,136				
Green		22	43	53	42	32			192				
Purple		21	32	42	31	20			146				
Black	3	215	428	485	274	151			1,556				
Total 2110 Sweater Long Sleeve									3030	38139	0	-5,9	
2120 Ladies Blouse	<u>38</u>	<u>38</u>	<u>40</u>	<u>42</u>	<u>44</u>	<u>46</u>	<u>48</u>						
White	1	2	3	3	2	2	1			14			
Pink	2	4	6	4	6	4	2			28			
Purple	2	5	8	9	6	5	2			37			
Black	3	7	11	12	8	7	3			51			
Blue	2	4	6	7	5	4	2			30			
Total 2120 Ladies Blouse									160	3126,00	0	57,5	
2135 Polo Shirt Sizes and Assortments	<u>S</u>	<u>M</u>	<u>L</u>	<u>XL</u>	<u>XXL</u>	<u>AA</u>	<u>BB</u>	<u>CC</u>					
Charcoal	1	2	2	2	1				8				
White	1	2	3	2	1				9				
Black						1	1	2	4				
Total 2135 Polo Shirt Sizes and Assortments									21	431	352	47,3	
2180 Polo Shirt Private Label	<u>XS</u>	S	M	L	XL	XXL							
White	2	4	4	2	2	2			16				
Total 2180 Polo Shirt Private Label									16	320,00	160	50,0	
2190000001 Tailor Made Men's Shirt									2	114	39	66	
2210 Ski Jack	L2	<u>38</u>	<u>38</u>	<u>40</u>	<u>42</u>	<u>44</u>	<u>46</u>	<u>48</u>	<u>50</u>	<u>52</u>			
		<u>54</u>	<u>56</u>	<u>58</u>	<u>60</u>								
Brown		1	2	3	4	3	2	1			16		
Grey		1	2	3	4	3	2	1			16		
Charcoal		1	2	3	4	3	2	1			16		
Total 2210 Ski Jack										48	1488,00	495	66,7
2310 Coverall Viscose		S	M	L	XL	XXL	3XL	4XL	5XL				

EXPECTED REVENUE WITH SUBTOTALS AND BUDGETS

Supposing you have entered a **Sales Budget** like this:

Sales Budget Overview

Process [Open in Excel](#) | Actions Less options

General

Item Budget Name	BUDGET 12	Show Value as	Sales Amount	Rounding Factor	1
Show as Lines	Customer	View by	Month	Show Column Name	☒
Show as Columns	Period				

Sales Budget Overview Matrix

CODE	NAME	BUDGETED QUANTITY	BUDGETED SALES AMOUNT	BUDGETED COST AMOUNT	JAN 2019	FEB 2019	MAR 2019	APR 2019	MAY 2019	JUN 2019	JUL 2019	AUG 2019	SEP 2019	OCT 2019
2000	The Fashion Store UK	0	23.000	0	16.000	5.000	2.000							
20000	Selangorian Ltd.	0	11.500	0	8.000	2.500	1.000							
2010	The Shoe Store Europe	0	800	0	500	200	100							
2020	Sportswear A/S	0	470	0	320	100	50							
2030	The Surf Shop Ltd.	0	0	0										
3000	The Furniture Shop UK	0	65.000	0	50.000	10.000	5.000							
3010	Office Supplies & Furni...	0	0	0										
3020	Och bett K&K	0	0	0										

Filters

Date Filter	01-01-19..31-12-19	Customergroup Filter		Brand Filter	
Customer Filter	2000 2010 2020 2030 3000 3010 3020 3030 2000	Salesperson Filter		Season Filter	
Item Filter	2110	Budget Dimension 3 Filter			

You could have created following **Setup No.:**

SALES STATISTICS SETUP HEADER

REV_CUST_BUDG

Process [Report](#) | Show Attached | Actions Less options

[Statistics](#) [Print](#) [E-Mail](#) [Show Chart](#) [Show Gauge](#) [Excel Formatted](#) [Excel List](#)

General

Setup No.	REV_CUST_BUDG	TOP DOWN	MISC.
Name	Revenue Customer/Master incl Budget	Top Down Value	Default by Page Action Page
Status	Active	Top Down Number	Allow on Portals ☐
SPECIFICATION		Show Others in Total ☒	Show Picture ☐
Calculated Value	Revenue		Explode Assortment ☐
Detailed By	Master		Drill Down Code
Group By 1	Sell-to Customer No.		
Group By 2			
Group By 3			

Data Series | [Manage](#)

[New Line](#) [Delete Line](#) [Setup/Filters](#)

SERIES LABEL	INCL. SALES ORDE...	INCL. SALES IMPO. LINES (WWW)	INCL. SALES INVOL.	INCL. SALES CREDIT MEM...	START DATE FORMULA	END DATE FORMULA	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	FILTER SALES BUDGET	USE IN GAUGE AS	FILTE...	CONT... FILTE...
	☒	☐	☐	☒	-CY	CY-1D	Quantity	Amount LCY	Discount LCY	Budget Amount	BUDGET 19		☒	☐
	☐	☐	☐	☐									☐	☐

SALES STATISTICS PAGE

Request No.

REV_CUST_BUDG

Data Source

Real-time

Global Filters

Date: 01-01-19..30-12-19, Intercompany: No, Master No.: 2110, Sales Budget...

Series 1

Manage

Process

Actions

Less options

Expand All

Collapse All

CODE	DESCRIPTION	QUANTITY	AMOUNT GBP	DISCOUNT GBP	BUDGET AMOUNT
01454545	New Concepts Furniture US-GA 31772 Atlanta	470	8.019	0	0
2110	Sweater Long Sleeve	470	8.019	0	0
01905893	Candoxy Canada Inc. CA-ON P78 5E2 Thunder Bay	580	0	0	0
2110	Sweater Long Sleeve	580	0	0	0
10000	The Cannon Group PLC B27 4KT Birmingham	1.300	19.500	0	0
2110	Sweater Long Sleeve	1.300	19.500	0	0
2000	The Fashion Store UK WC1 3DG London	660	10.211	0	23.000
2110	Sweater Long Sleeve	660	10.211	0	23.000
20000	Selangorian Ltd. CV6 1GY Coventry	0	0	0	11.500
2110	Sweater Long Sleeve	0	0	0	11.500
2010	The Shoe Store Europe NL-1009 AG Amsterdam	0	0	0	800
2110	Sweater Long Sleeve	0	0	0	800
2020	Sportswear A/S DK-8800 Viborg	0	0	0	470
2110	Sweater Long Sleeve	0	0	0	470
3000	The Furniture Shop UK WC1 3DG London	20	409	0	65.000
2110	Sweater Long Sleeve	20	409	0	65.000
TOTAL	Total List	3.030	38.139	0	100.770

This is with the following filters:

i

Filters:
Date: 01-01-19..30-12-19
Intercompany: No
Master No.: 2110
Sales Budget: BUDGET 19

OK

TOP 10 MASTERS

If you want to know the Top 10 of your sold Masters.

The **Setup No.** could look like:

SALES STATISTICS SETUP HEADER

TOP10_MASTERS

[Process](#)
[Report](#)
[Show Attached](#)
[Actions](#)
[Less options](#)

Activate

Make Inactive

General

Setup No.

TOP10_MASTERS

Name

Top 10 of Masters Revenue

Status

Active

SPECIFICATION

Calculated Value

Revenue

Detailed By

Master

Group By 1

Group By 2

Group By 3

TOP DOWN

Top Down Value

Amount LCY

Top Down Number

10

Show Others in Total

MISC.

Default by Page Action

Page

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code

Data Series

Manage

New Line

Delete Line

Setup/Filters

SERIES LABEL	INCL. SALES ORDE..	INCL. SALES IMPO. LINES (WWW)	INCL. SALES INVOL..	INCL. SALES CREDIT MEM..	START DATE FORMULA	END DATE FORMULA	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	FILTER SALES BUDGET	USE IN GAUGE AS	FILTE..	CONT. FILTE..
This year					-CY	CY	Quantity	Amount LCY	Cost	GM				

SALES STATISTICS PAGE

Request No.

TOP10_MASTERS

Data Source

Real-time

Global Filters

Date: 01-01-19..31-12-19, Intercompany No, Master No.: <>""

Series 1

This year

Manage

Process

Actions

Less options

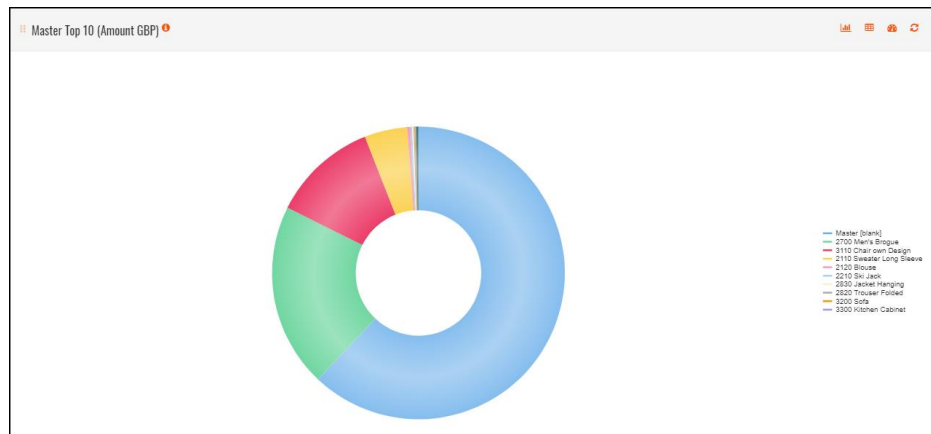
Expand All

Collapse All

CODE	DESCRIPTION	QUANTITY	AMOUNT GBP	COST	GM
2700	Men's Brogue	1.845	164.824	50.294	80
3110	Chair own Design	1.595	94.931	35.295	63
2110	Sweater Long Sleeve	3.030	38.139	0	-6
2120	Ladies Blouse	160	3.122	0	58
2210	Ski Jack	48	1.488	497	67
2830	Jacket Hanging	36	1.220	0	59
2820	Trouser Folded	41	868	0	64
3200	Sofa	2	800	401	50
3300	Kitchen Cabinet (Bottom, excl. Top, Plinth)	5	578	408	29
2310	Coverall Viscose	51	536	246	54
#OTHER	Total Other	51	1.579	0	56
TOTAL	Total List	6.864	308.085	0	64

Alternatively, perhaps:

Keep in mind that you can only see a Chart if you have one of the TRIMIT Portals installed as well.



GAUGE WITH REVENUE THIS YEAR AS PERCENTAGE OF LAST YEAR

You want to see in a Gauge how the revenue of this year relates to the revenue of next year.

Keep in mind that you can only see a Gauge if you have one of the TRIMIT Portals installed as well.

The **Setup No.** could look as follows:

SALES STATISTICS SETUP HEADER

GAUGETEST

Process Report Show Attached Actions Less options

General

Setup No. GAUGETEST

Name Revenue This Year as % of Last Year

Status Inactive

SPECIFICATION

Calculated Value Revenue

Detailed By Sell-to Customer No.

Group By 1

Group By 2

Group By 3

TOP DOWN

Top Down Value

Top Down Number 0

Show Others in Total

MISC.

Default by Page Action Gauge

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code

Data Series Manage

SERIES LABEL	INC... SAL... IMP... LIN... ORD...	INC... SAL... INV...	INC... SAL... CRE... ME...	START DATE FORMULA	END DATE FORMULA	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	FILTER SALES BUDGET	USE IN GAUGE AS	FILT...	CO... FILT...
Last Year				CY-2Y+1D	CY-1Y	Quantity	Amount LCY	Discount LCY	Budget Amount		Threshold Value		
This Year				CY-1Y+1D	CY	Quantity	Amount LCY	Discount LCY	Budget Amount				

We have budgeted a 25% raise, so **Threshold 2** has been set to 125.

Gauge

Gauge Value Type Percent

Min Value 0

Max Value 200

Threshold 1 50

Threshold 2 125

Range Style Unfavorable -> Favorable

SALES STATISTICS PAGE

Request No. GAUGETEST

Data Source Real-time

Global Filters Intercompany: No

Series 1 Last Year - Date: 01/01/18..12/31/18

Series 2 This Year - Date: 01/01/19..12/31/19

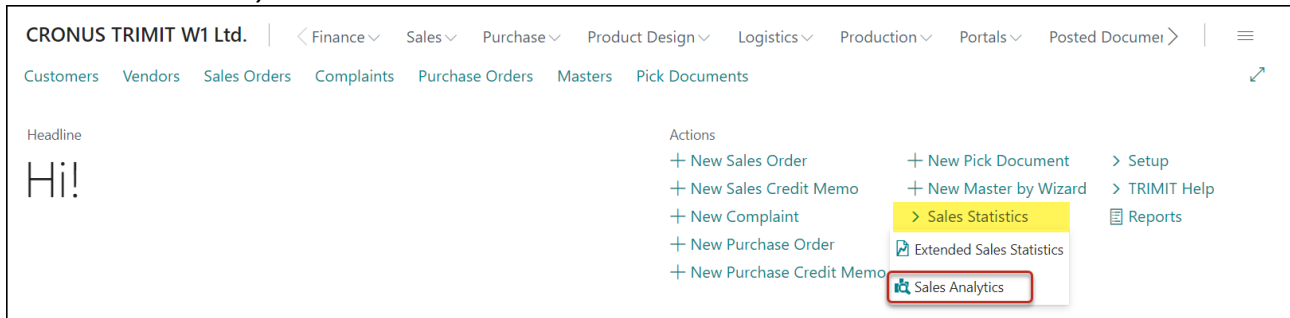
Manage Process Actions Less options

CODE	DESCRIPTION	QUANTITY [1]	AMOUNT GBP [1]	DISCOUNT GBP [1]	BUDGET AMOUNT [1]	QUANTITY [2]	AMOUNT GBP [2]	DISCOUNT GBP [2]	BUDGET AMOUNT [2]
32789456	Lovina Contractors BE-3000 Leuven	0	0	0	0	4	3,314	585	0
35451236	Gagn & Gaman IS-220 Hafnafjordur	0	0	0	0	1	877	97	0
35963852	Heimilisprjdi IS-108 Reykjavik	0	0	0	0	4	2,024	342	0
38128456	MEMA Ljubljana d.o.o. SI-1000 Ljubljana	0	0	0	0	59	122,801	32,000	0
40000	Deerfield Graphics Company GL1 9HM ...	6	1,063	0	0	58	4,142	0	0
42147258	BYT-KOMPLET s.r.o. CZ-687 01 Bojkovice	0	0	0	0	13	1,603	0	0
43687129	Designstudio Gmunden AT-4810 Gmun...	0	0	0	0	87	156,744	47,000	0
46897889	Englunds Kontorsmöbler AB SE-600 03 ...	0	0	0	0	5	1,213	214	0
47563218	Klubben NO-1344 Haslum	0	0	0	0	3	11,772	0	0
49525252	Beef House DE-40593 Dusseldorf	0	0	0	0	136	27,936	0	0
49633663	Autohaus Mielberg KG DE-22417 Hamb...	0	0	0	0	181	102,852	25,450	0
49858585	Hotel Pferdesee DE-60320 Frankfurt/Ma...	0	0	0	0	63	14,396	2,400	0
50000	Guildford Water Department GU7 5GT ...	2	533	0	0	0	0	0	0
60000	Blanemark Hifi Shop W1 3AL London	0	0	0	0	138	12,520	0	0
61000	Fairway Sound W2 8HG London	0	0	0	0	25	1,670	0	0
62000	The Device Shop N16 34Z London	0	0	0	0	62	3,814	0	0
CW00010	Linda Nielsen GL4 4NN Brimsfield	2	64	0	0	0	0	0	0
CW00020	Anders L. Krogh 8840 Redkaersbro	2	121	0	0	0	0	0	0
CW00030	Kristen R. Osborn MN 56201 Wilmar	2	248	0	0	0	0	0	0
CW00040	Nadijah Bakkeren 6137 BD Sittard	0	0	0	0	3	355	0	0
CW00050	Kitty Bisseling 7206 Zutphen	0	0	0	0	1	30	0	0
TOTAL	Total List	35,835	540,541	0	0	8,102	818,906	109,621	0

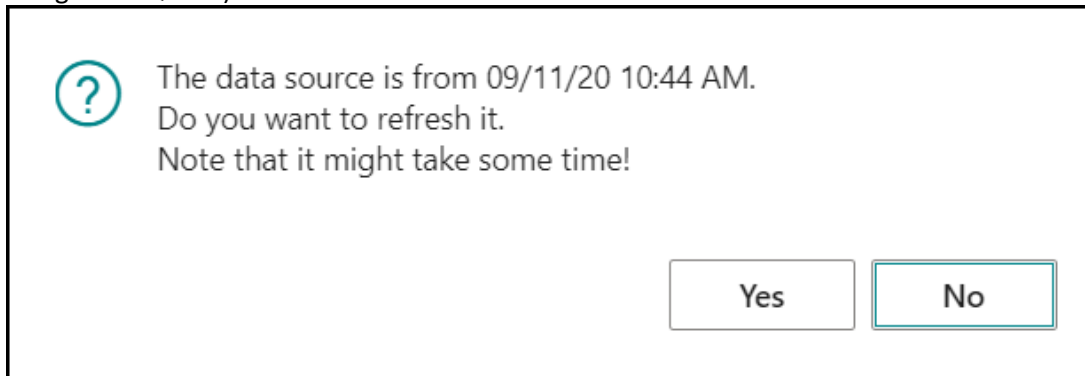
SALES ANALYTICS

Besides setting up the **Extended Sales Statistics** by using the Setups, it is also possible to see the Sales Statistics on the fly.

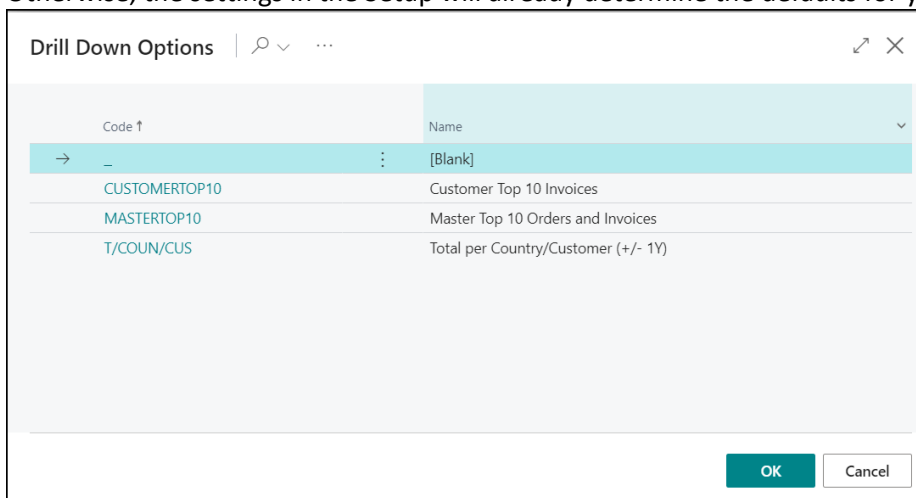
In the Role Center **TRIMIT Small Business** you can click **Sales Statistics**, **Sales Analytics**, or you can find it via **Search Sales Analytics**.



The Sales Analytics are always based on the **Statistics Data**; therefore, you can get a message to update the Data Source if it is not updated before until the current day (in an **Extended Sales Statistics Setup List** or by using a Job Queue)



If some of the **Extended Sales Statistics Setups** have a checkmark in **Default Analytics** you will see a list from which you can choose an existing Setup, but when choosing **Blank**, you will start from scratch. Otherwise, the settings in the Setup will already determine the defaults for your **Sales Analytics**.



Work Date: 9/6/2020






 Saved




Sales Analytics Request

 Show Statistics
More options

Request Param.

Detailed By Sell-to Customer No.

Data Source

Data Source DateTime 2/15/2023 11:37 AM

Include Transactions

Include Sales Orders ☐

Include Sales Invoices ☒

Include Sales Credit Memos ☒

FASTTAB REQUEST PARAM.

DETAILED BY

Actually, this is the highest level for your Statistics.

You can choose between the following 46 options:

Sell-to Customer No.	Global Dimension 1	Item Category Code
Bill-to Customer	Global Dimension 2	Forecast Item
Company Group	Location	Tariff Position
Chain	Currency	Primary Vendor
Salesperson	Return Reason	Variant 1
Salesperson 2	Campaign No.	Variant 2
Salesperson 3	Item	Variant 3
Territory	VarDim Y-Axis	Date
Country/Region	Master	Week
Sell-to Group	Group Master	Month
Sell-to Type	Product Family	Quarter
Customer Statistics Group	Item Statistics Group	Year
Sales Channel	Item Statistics Group 2	Document Type
Order Type	Item Statistics Group 3	Document No
Collection	Item Statistics Group 4	
Period Code	Item Statistics Group 5	

INCLUDE SALES ORDERS

If you want Sales Orders included in your Statistics, set a check mark here.

INCLUDE SALES INVOICES

If you want Posted Sales Invoices included in your Statistics, set a check mark here.

INCLUDE SALES CREDIT MEMOS

If you want Posted Sales Credit Memos included in your Statistics, set a check mark here.

DATA SOURCE DATETIME

This field is set by the system based on the last time you did update the Statistics Data.

NOTE

If you did choose a **Setup No.** from the Start, the **Detailed By** will be filled with the **Group by 3** or **Group by 2** or **Group by 1** or **Detailed By**. The system will determine what the highest level is of the **Setup No.**
Also, the checkmarks will be set based on the **Setup No.** and the first Data Serie.

FASTTAB FILTER PERIOD 1

Filter Period 1	
General	Item Related
Start Date 1/1/2019	Filter Collection No.
End Date 12/31/2019	Filter Master No.
Filter Sales Channel	Filter Primary Vendor
Brand Filter	Filter Location Code
Customer Related	
Filter Sell-to Customer No.	
Filter Chain	
Filter Salesperson	
Filter Country/Region Code	

You must fill at least the **Start Date** and **End Date** for the Sales Analytics.
The rest of the filters are optional to fill.

NOTE

If you did choose a **Setup No.** from the Start, the **Start Date** and **End Date** will be determined based on the first Data Series and the Filters will already be filled by default from the **Setup No.**

FASTTAB FILTER PERIOD 2

Filter Period 2	
Start Date	Filter Collection No.
End Date	Brand Filter
Filter Sales Channel	

It is not necessary to fill this FastTab.

The Filters that are not mentioned in **Filter Period 2** will be based on the Filters that you entered in FastTab **Filter Period 1**.

NOTE

If you did choose a **Setup No.** from the Start, the **Start Date** and **End Date** will be determined based on the second Data Series and the Filters will already be filled by default from the **Setup No.**

Via **Actions, Refresh Statistics Data** you can update the Statistics Data.

Work Date: 9/6/2020

Sales Analytics Request

Show Statistics
Actions
Related
Fewer options

Request Param.

Refresh Statistics Data

Other

Via **Related** you can also setup **Filters Series 1, 2, 3, 4, 5** the same way as in the **Setup Nos.** for the Data Series.

Work Date: 9/6/2020

Sales Analytics Request

Show Statistics | Actions ▾ **Related ▾** Fewer options

Request Param.

Detailed By

Include Transactions

Include Sales Orders

Include Sales Invoices

Filter Serie 1

Filter Serie 2

Filter Serie 3

Filter Serie 4

Filter Serie 5

Filter Series 1 will then also already show the filters you did set in the FastTab [Filter Period 1](#)

Edit - Sales Statistics Setup Line - 0

General

Dates

Start Date 1/1/2019

End Date 12/31/2019

Filters

General Filters	Customer Related	Item Related
Filter Document Type	Filter Sell-to Customer No.	Filter Item No.
Filter Document No.	Filter Bill-to	Filter VarDim Y-Axis
Filter Sales Channel	Filter Company Group	Filter Master No.
Filter Order Type	Filter Chain	Filter Group Master
Filter Collection No.	Filter Salesperson	Filter Product Family
Filter Period Code	Filter Salesperson 2	Design Filter
Brand Filter	Filter Salesperson 3	Item Group Filter
Season Filter	Filter Territory	Gender Filter
Filter Location Code	Filter Country/Region Code	Item Statistics Group 4 Filter
Filter Currency Code	Filter Sell-to Group	Item Statistics Group 5 Filter
Filter Return Reason Code	Filter Sell-to Type	Filter Item Category Code

Close

After all the Filters have been set, you can click **Show Statistics**

Work Date: 9/6/2020

Sales Analytics Request

Show Statistics

Actions

Related

Fewer options

Edit - Sales Analytics

Search

Show Filters

Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Series 2	Net Amount LCY Series 2	Discount Amount LCY Series 2	Cost Amount LCY Series 2	Net Amount LCY Index (2-1)
01445544	Progressive Home Furnishings US-IL 6123...	0	0	0	0	16	1,499	97	1,194	0
10000	The Cannon Group PLC B27 4KT Birmingh...	0	0	0	0	25	9,662	336	7,137	0
→ 2000	The Fashion Store UK WC1 3DG London	330	11,877	0	4,184	0	0	0	0	0
20000	Selangorian Ltd. CV6 1GY Coventry	0	0	0	0	5	173	5	139	0
30000	John Haddock Insurance Co. MO2 4RT Ma...	0	0	0	0	4	689	0	0	0
32656565	Antarcticopy BE-2050 Antwerpen	0	0	0	0	17	2,583	139	1,857	0
35451236	Gagn & Gaman IS-220 Hafnafjordur	0	0	0	0	1	877	97	709	0
35963852	Heimilisprydi IS-108 Reykjavik	0	0	0	0	4	2,024	342	1,686	0
40000	Deerfield Graphics Company GL1 9HM Glo...	6	1,063	0	0	0	0	0	0	0
42147258	BYT-KOMPLET s.r.o. CZ-687 01 Bojkovice	0	0	0	0	13	1,603	0	1,249	0

Now you can click on any Quantity/Amount to go a level deeper by selecting another level:

You can choose between the following $46 - 1 = 45$ options: i.e., **Master**

~~Sell-to Customer No.~~
Bill-to Customer
Company Group
Chain
Salesperson
Salesperson 2
Salesperson 3
Territory
Country/Region
Sell-to Group
Sell-to Type
Customer Statistics Group
Sales Channel
Order Type
Collection
Period Code

Global Dimension 1
Global Dimension 2
Location
Currency
Return Reason
Campaign No.
Item
VarDim Y-Axis
Master
Group Master
Product Family
Item Statistics Group
Item Statistics Group 2
Item Statistics Group 3
Item Statistics Group 4
Item Statistics Group 5

Item Category Code
Forecast Item
Tariff Position
Primary Vendor
Variant 1
Variant 2
Variant 3
Date
Week
Month
Quarter
Year
Document Type
Document No

Edit - Sales Analytics

Search

Show Filters

Back

Back to Start

Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Series 2	Net Amount LCY Series 2	Discount Amount LCY Series 2	Cost Amount LCY Series 2	Net Amount LCY Index (2-1)
2100	Lily Blouse	330	11,877	0	4,184	0	0	0	0	0
→ TOTAL	Total List	330	11,877	0	4,184	0	0	0	0	0

Now you can click on any Quantity/Amount to go a level deeper by selecting another level:

You can choose between the following $46 - 2 = 44$ options: i.e., **Variant 1**

~~Sell-to Customer No.~~
Bill-to Customer
Company Group
Chain
Salesperson
Salesperson 2
Salesperson 3
Territory
Country/Region
Sell-to Group
Sell-to Type
Customer Statistics Group
Sales Channel
Order Type
Collection
Period Code

Global Dimension 1
Global Dimension 2
Location
Currency
Return Reason
Campaign No.
Item
VarDim Y-Axis
~~Master~~
Group Master
Product Family
Item Statistics Group
Item Statistics Group 2
Item Statistics Group 3
Item Statistics Group 4
Item Statistics Group 5

Item Category Code
Forecast Item
Tariff Position
Primary Vendor
Variant 1
Variant 2
Variant 3
Date
Week
Month
Quarter
Year
Document Type
Document No

Edit - Sales Analytics											
Search Show Filters Back Back to Start Open in Excel											
Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Series 2	Net Amount LCY Series 2	Discount Amount LCY Series 2	Cost Amount LCY Series 2	Net Amount LCY Index (2-1)	
20	Royal Blue	65	2,339	0	822	0	0	0	0	0	0
35	Orange	70	2,519	0	886	0	0	0	0	0	0
70	Red	79	2,843	0	1,000	0	0	0	0	0	0
99	Black	116	4,175	0	1,475	0	0	0	0	0	0
→ TOTAL	Total List	330	11,876	0	4,183	0	0	0	0	0	0

This way, you can go on and on and on.

By clicking **Show Filters**, you will see the selected Filters so far:

REVENUE

Global Filters:

Intercompany: No

Master No.: 2100

Sell-to Customer No.: 2000

Series 1:

Date: 01/01/19..12/31/19

Series 2:

Date: 01/01/20..12/31/20

OK

By clicking **Back**, you will go one level back.

By clicking **Back to Start**, you will go back to the first Statistic you saw based on the settings in the **Sales Analytics**.

By clicking **Share this page with other users or apps**, you can export the current view i.e., to MS Excel.

See [Sharing Data - Business Central | Microsoft Learn](#)

	A	B	C	D	E	F	G	H	I	J	K
	Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Series 2	Net Amount LCY Series 2	Discount Amount LCY Series 2	Cost Amount LCY Series 2	Net Amount LCY Index (2-1)
1	20	Royal Blue	65	2,339	0	822	0	0	0	0	0
2	35	Orange	70	2,519	0	886	0	0	0	0	0
3	70	Red	79	2,843	0	1,000	0	0	0	0	0
4	99	Black	116	4,175	0	1,475	0	0	0	0	0
5	TOTAL	Total List	330	11,876	0	4,183	0	0	0	0	0
6											
7											
8											

DATA WAREHOUSE STATISTICS

There is an extra Page **trm Statistics Data Warehouse (6036864, List)** with all the Statistics Data created for our TRIMIT Sales Statistics. You can find it via **Search Statistics Data Warehouse**.

This page can easily be used to **Open in Excel** to create your own analysis/views.

Statistics Data Warehouse																			
Search																			
Transaction Type ↑	Document Type ↑	Docu... No. ↑	Docu... Line No. ↑	Sell-to Custo... No. ↑	Item No.	Master No.	Net Amount	Cost Amount	Discount Amount	Net Amount LCY	Cost Amount LCY	Discount Amount LCY	Inte...	Order Type	Quantity	Inventory Adjst. Credit Memo	Bill-to	Comp... Group	Chain
Sales Invoice	Invoice	103001	18998	2000	60009905	6000	240	0	0	240	0	0	☐		8	Yes	2000		
Sales Invoice	Invoice	103001	19164	2000	60009906	6000	150	0	0	150	0	0	☐		5	Yes	2000		
Sales Invoice	Invoice	103002	10822	2000	21002001	2100	719.8	345.165	0	719.8	345.165	0	☐		20	Yes	2000		JR
Sales Credit...	Credit Memo	104001	10822	2000	21002001	2100	-179.95	0	0	-179.95	0	0	☐		-5	No (Statistics ... 2000			JR
Sales Credit...	Credit Memo	104002	10822	2000	21002001	2100	-359.9	-172.5825	0	-359.9	-172.5825	0	☐		-10	Yes	2000		JR
Sales Order	Order	101001	10000	10000	1996-S		10,880.4	8,486.4	0	10,880.4	8,486.4	0	☐		12	Yes	10000		
Sales Order	Order	101002	10000	10000	1968-S		1,233	961	0	1,233	961	0	☐		10	Yes	10000		
Sales Order	Order	101002	20000	10000	1928-S		249.2	194.6	0	249.2	194.6	0	☐		7	Yes	10000		
Sales Order	Order	101003	10000	30000	1920-S		3,363.2	2,624	0	3,363.2	2,624	0	☐		8	Yes	30000		
Sales Order	Order	101004	10000	40000	2000-S		369.9	288.3	0	369.9	288.3	0	☐		3	Yes	40000		
Sales Order	Order	50001	10881	2000	21002002	2100	71.98	35.4165	0	71.98	35.4165	0	☐		2	Yes	2000		JR
Sales Order	Order	50001	10940	2000	21002003	2100	107.97	54.47475	0	107.97	54.47475	0	☐		3	Yes	2000		JR
Sales Order	Order	50001	10999	2000	21002004	2100	107.97	57.17475	0	107.97	57.17475	0	☐		3	Yes	2000		JR
Sales Order	Order	50001	11058	2000	21002005	2100	71.98	39.9165	0	71.98	39.9165	0	☐		2	Yes	2000		JR
Sales Order	Order	50001	11113	2000	21002006	2100	71.98	39.9165	0	71.98	39.9165	0	☐		2	Yes	2000		JR