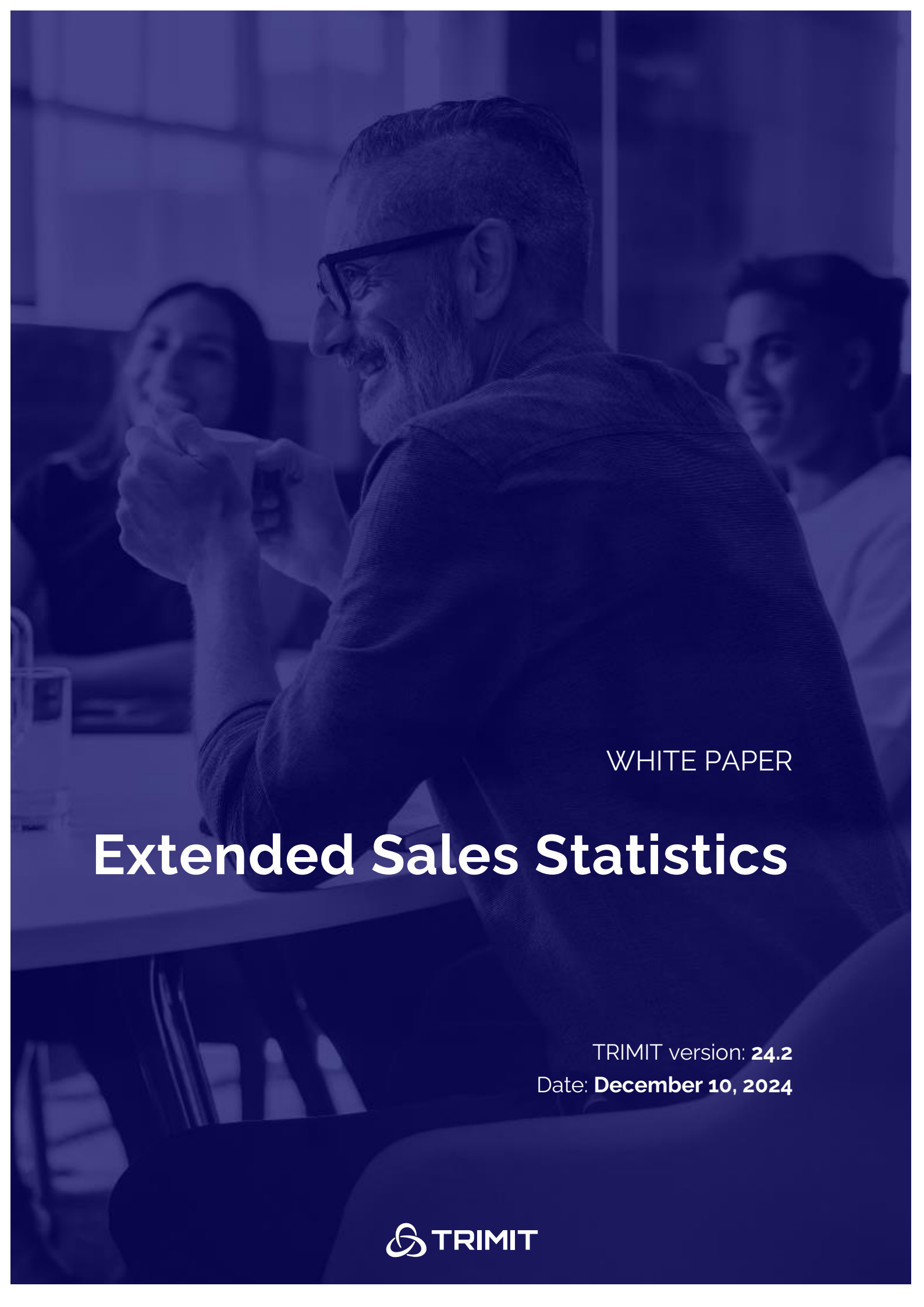




WHITE PAPER

Extended Sales Statistics

TRIMIT version: **24.2**

Date: **December 10, 2024**

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Introduction

This document contains information regarding the **Extended Sales Statistics** and the **Sales Analytics** functionality in TRIMIT 24.2 for Microsoft Dynamics 365 Business Central 2024 Wave 2 (W1).

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 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 24.2 for Business Central W1 BC25.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 24.2**, which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Note

The pictures in this White Paper are based on the Data created with our **TRIMIT Data and Test App**. This can differ from the Data in our Demo Sites.

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

The pages

6036854 trm Sales Analytics Request
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
6036853 trm Statistics Output Handler

The queries

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

Enum

6036502 trm Statistics Specification

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

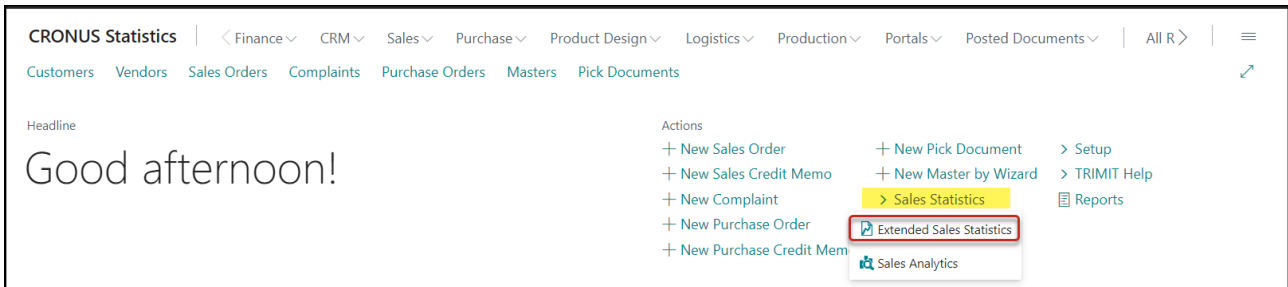
Besides running Statistics based on Real-time Data, it is possible to use the Codeunit **6036852 trm Statistics Query Handler** to store data in Table **6036854 trm Statistics Data**.

Because of performance, which is particularly important for Statistics generated and shown on 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 an existing Sales Order.

The Codeunit **6036852 trm Statistics Query Handler** can be set 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 or Integrations) are added to the Table **6036854 trm Statistics Data**, whereas all Sales Order information is regenerated.

Manually

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



CRONUS Statistics | < Finance > CRM > Sales > Purchase > Product Design > Logistics > Production > Portals > Posted Documents > | All R > | ≡

Customers Vendors Sales Orders Complaints Purchase Orders Masters Pick Documents

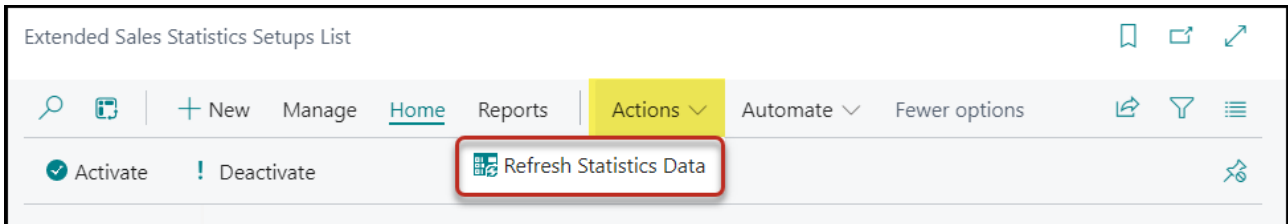
Headline

Good afternoon!

Actions

- + New Sales Order
- + New Sales Credit Memo
- + New Complaint
- + New Purchase Order
- + New Purchase Credit Memo
- + New Pick Document
- + New Master by Wizard
- > Sales Statistics
- Extended Sales Statistics
- Sales Analytics
- > Setup
- > TRIMIT Help
- Reports

Click **Actions, Refresh Statistics Data** to update the **Statistics Data**.

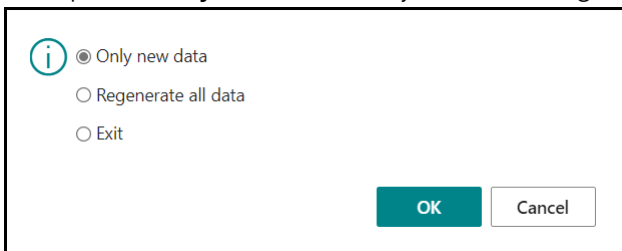


Extended Sales Statistics Setups List

🔍 📄 + New Manage Home Reports Actions Automate Fewer options

✓ Activate ! Deactivate Refresh Statistics Data

In that case, you can also choose if you want to update the Statistics Data only with the new Data since last update: **Only new data** or if you want to regenerate all the Statistics Data: **Regenerate all data**.



i ☒ Only new data

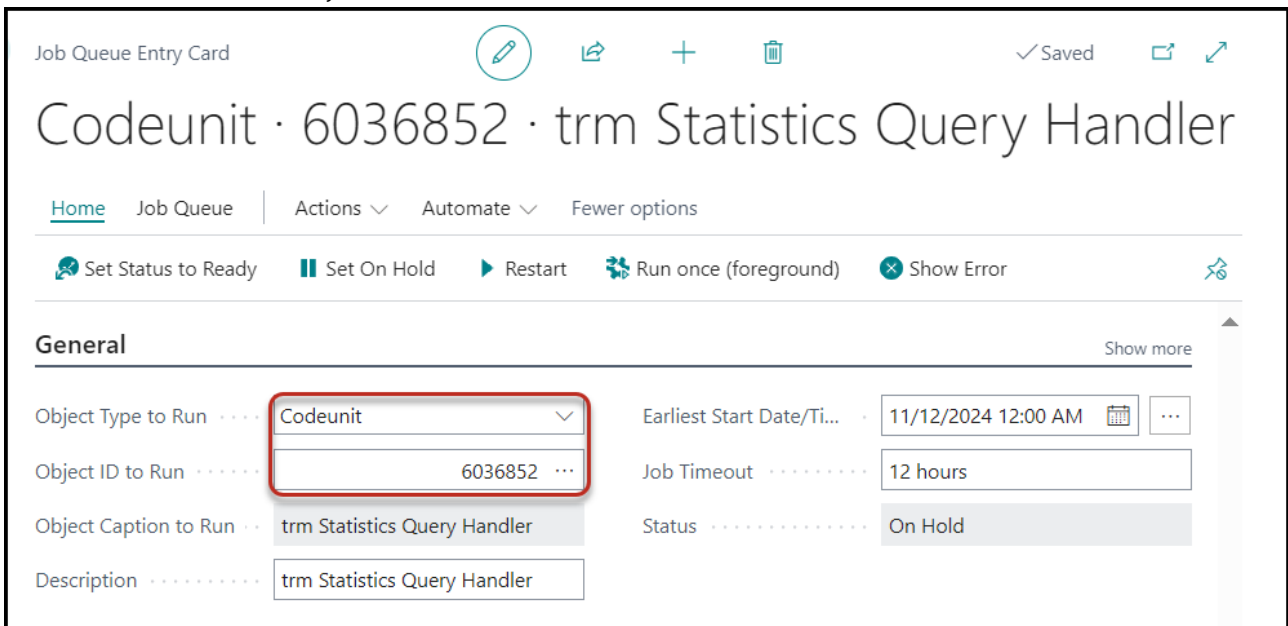
☐ Regenerate all data

☐ Exit

OK Cancel

Via Job Queue Entry

Via **Search Job Queue Entry**:



Job Queue Entry Card

Codeunit · 6036852 · trm Statistics Query Handler

Home Job Queue Actions Automate Fewer options

🔄 Set Status to Ready || Set On Hold ▶ Restart 🔄 Run once (foreground) ⚠ Show Error

General Show more

Object Type to Run ... Codeunit

Object ID to Run ... 6036852

Object Caption to Run ... trm Statistics Query Handler

Description ... trm Statistics Query Handler

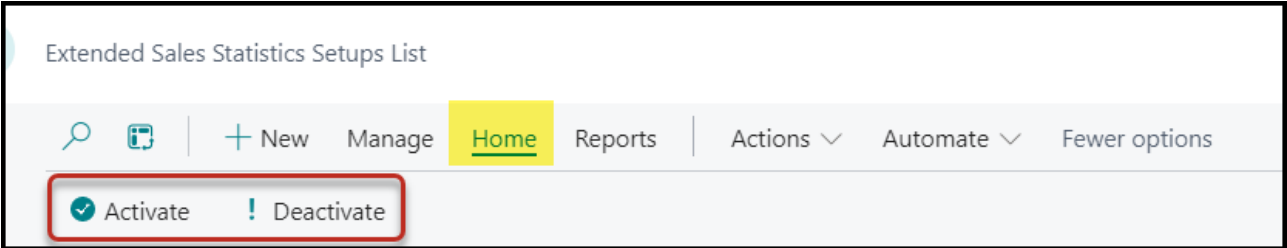
Earliest Start Date/Ti... 11/12/2024 12:00 AM

Job Timeout ... 12 hours

Status ... On Hold

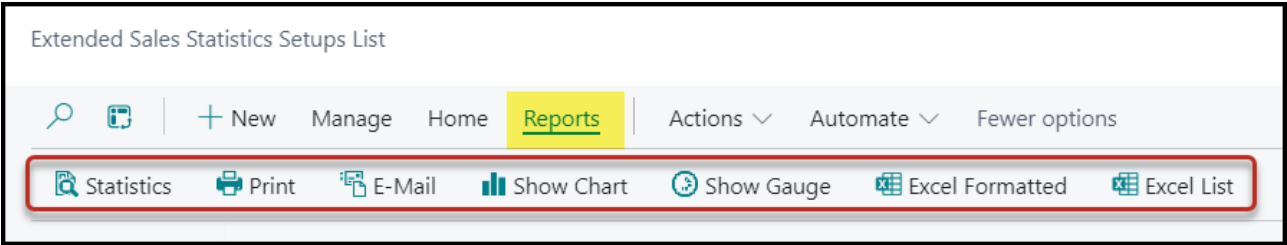
Extended Sales Statistics Setups

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**.

The screenshot shows two parts of the TRIMIT interface. On the left, the 'My Actions' menu is open, with 'Manage List' highlighted. A red arrow points from this menu item to the 'Edit Page Actions' table on the right. The table has columns: Default Collapse, Type, No. / Link, Name, All Users, Only Current Company, and Company Name. A row is highlighted with 'Sales Statistics' in the Type column and 'ORDERINT' in the No. / Link column. The Name column for this row is 'Order Intake per Week'.

Extended Sales Statistics Setup Nos.

You can maintain the **Extended Sales Statistics Setups** 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.**

The screenshot shows two parts of the TRIMIT interface. On the left, a search results page for 'sales statistics setups' is shown, with 'Extended Sales Statistics Setup List' as the result. On the right, the 'Extended Sales Statistics Setups List' page is shown. It has a '+ New' button and 'Manage', 'Edit', 'View', and 'Delete' actions. The 'Manage' button is highlighted in yellow.

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.**

The screenshot shows the 'Extended Sales Statistics Setup' form for 'TEST1'. The form has sections for General, Specification, and Misc. The General section includes fields for Setup No., Name, Status, and Calculated Value. The Specification section includes fields for Detailed By, Group By 1, Group By 2, and Group By 3. The Misc. section includes fields for Top-down, Show Others in Total, Show Picture, and Show in Alternative Currency.

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.

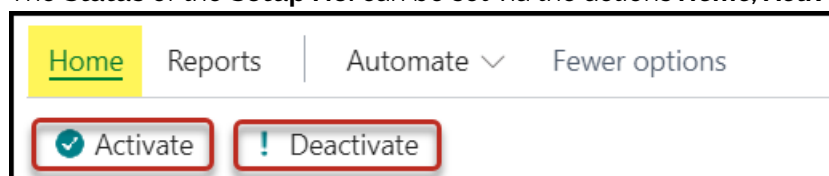
Status

The **Status** determines if the settings in the **Setup No.** can be changed, if the **Setup No.** can be chosen in the **Extended Sales Statistics** Report or if you can execute the Statistics.

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

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

The **Status** of the **Setup No.** can be set via the actions **Home, Activate** and **Home, 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 Amounts/Quantities in the selected intervals, entered in the Start-/End Date ^{*)} or Start-/End Date Formula of the Data Series lines. This Dates will be compared with the Shipment Date of the Sales Documents and Sales Import Lines and the Posting Date of the Posted Sales Invoices and Posted Credit Memos.
Order Intake	Shows the Amounts/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.

You need to use the lookup to choose the option.

You can choose between the following 48 options:

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

1. The names depend on the names of the **Global Dimensions 1 and 2** – in the TRIMIT Demo Data set to Brand and Season.

2. The names depend on the Caption Class Setup of the **Item Statistics Group 1 – 5**.

3. The name depend on the name of the **Sustainability Grp 1**.

Group By 1, 2 & 3

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

The option list contains the same topics as the lookup for the **Detailed By** field.

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:

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)
DE	Germany	8,400	389,746	0	0	1,347	56,370	0	0
GB	Great Britain	25,284	1,045,764	0	0	7,294	333,389	0	0
10000	Adidas Corporation CB1 2FB Cambridge	0	0	0	0	1,071	49,967	0	0
MASTER (BLANK)	Master (Blank)	0	0	0	0	29	12,362	0	0
192B-5	AMSTERDAM Lamp	0	0	0	0	7	349	0	0
194B-5	MEXICO Suvell Chair black	0	0	0	0	10	1,233	0	0
1996-5	ATLANTA Whiteboard base	0	0	0	0	12	10,880	0	0
2100	Lily Blouse	0	0	0	0	1,042	37,505	0	0
21002002	Uly Blouse Royal Blue.S	0	0	0	0	26	936	0	0
21002003	Uly Blouse Royal Blue.M	0	0	0	0	52	1,871	0	0
21002004	Uly Blouse Royal Blue.L	0	0	0	0	53	1,907	0	0
21002005	Uly Blouse Royal Blue.XL	0	0	0	0	28	1,008	0	0
21002006	Uly Blouse Royal Blue.XXL	0	0	0	0	12	432	0	0
21002007	Uly Blouse Royal Blue.3XL	0	0	0	0	1	36	0	0
21003002	Uly Blouse Yellow.S	0	0	0	0	25	900	0	0
21003003	Uly Blouse Yellow.M	0	0	0	0	50	1,800	0	0
21003004	Uly Blouse Yellow.L	0	0	0	0	50	1,800	0	0
21003005	Uly Blouse Yellow.XL	0	0	0	0	50	1,800	0	0
21003006	Uly Blouse Yellow.XXL	0	0	0	0	25	900	0	0
21003002	Uly Blouse Orange.S	0	0	0	0	15	540	0	0
21003003	Uly Blouse Orange.M	0	0	0	0	35	1,260	0	0
21003004	Uly Blouse Orange.L	0	0	0	0	35	1,260	0	0
21003005	Uly Blouse Orange.XL	0	0	0	0	15	540	0	0
21003006	Uly Blouse Orange.XXL	0	0	0	0	10	360	0	0
21007002	Uly Blouse Red.S	0	0	0	0	20	720	0	0
21007003	Uly Blouse Red.M	0	0	0	0	30	1,080	0	0
21007004	Uly Blouse Red.L	0	0	0	0	40	1,440	0	0
21007005	Uly Blouse Red.XL	0	0	0	0	30	1,080	0	0
21007006	Uly Blouse Red.XXL	0	0	0	0	20	720	0	0
21009001	Uly Blouse BlackXS	0	0	0	0	1	36	0	0
21009002	Uly Blouse Black.S	0	0	0	0	62	2,231	0	0
21009003	Uly Blouse Black.M	0	0	0	0	98	3,527	0	0
21009004	Uly Blouse Black.L	0	0	0	0	108	3,887	0	0
21009005	Uly Blouse Black.XL	0	0	0	0	99	3,547	0	0
21009006	Uly Blouse Black.XXL	0	0	0	0	57	2,051	0	0
21009007	Uly Blouse Black.3XL	0	0	0	0	1	36	0	0
2000	The Fashion Store UK CB1 2FB Cambridge	6,720	279,706	0	0	2,446	94,401	0	0
2000	Olivia Trousers	1,680	67,320	0	0	210	8,415	0	0
20002038	Olivia Trousers Royal Blue.38	120	4,440	0	0	15	555	0	0
20002038	Olivia Trousers Royal Blue.38	120	4,440	0	0	15	555	0	0
20002040	Olivia Trousers Royal Blue.40	120	4,680	0	0	15	585	0	0

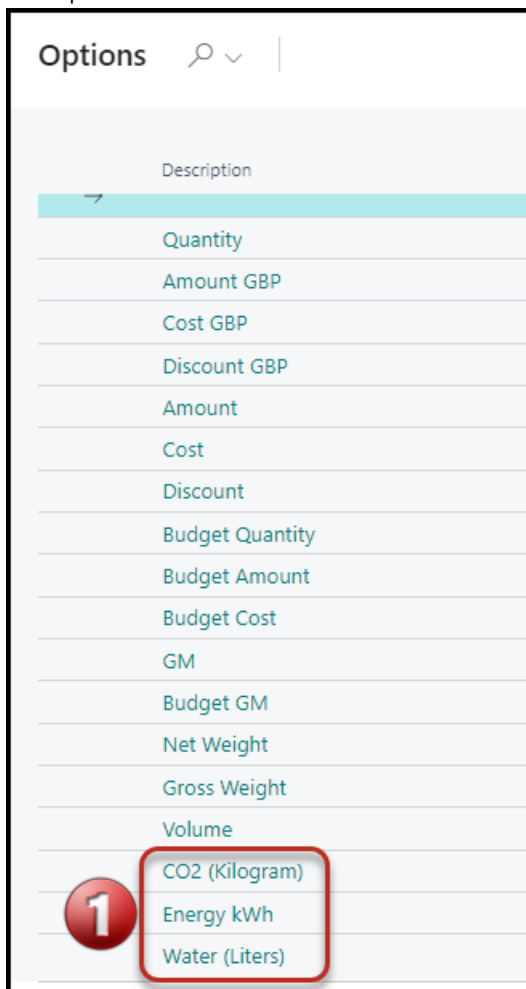
Because you are free, to choose any of the topics for both **Detailed By** and **Group By 1-3**, it is your own responsibility to do the setup logically. If you for instance have chosen *Master* as **Detailed By**, it would make no sense to choose *Item* for your **Group By 1** Subtotal.

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 descending.

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**:



Options

Description

Quantity

Amount GBP

Cost GBP

Discount GBP

Amount

Cost

Discount

Budget Quantity

Budget Amount

Budget Cost

GM

Budget GM

Net Weight

Gross Weight

Volume

CO2 (Kilogram)

Energy kWh

Water (Liters)

1. These are the Descriptions of the [Sustainability VarDim Types 1 – 4](#).

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-Down 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.

An example:

You want to see the top 10 of your Customers Revenue based on the *Amount GBP*.

Extended Sales Statistics Setup

CUSTOMERTOP10

Home Reports Automate Fewer options

Activate Deactivate

General

Setup No. CUSTOMERTOP10

Name Customer Top 10 Invoices

Status Active

Specification

Calculated Value Revenue

Detailed By Sell-to Customer No.

Group By 1

Group By 2

Group By 3

Top-down

Top-down Value Amount GBP

Top-down Number 10

Show Others in Total

Misc.

Default by Page Action Page

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code

Show in Alternative Currency

Unit Cost Document Line

Data Series New Line Delete Line Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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
→ This Year	☐	☐	☒	☒	-CY	CY	Quantity	Amount GBP	Cost GBP	GM			☐	☐
Last Year	☐	☐	☒	☒	-CY-1Y	CY-1Y	Quantity	Amount GBP	Cost GBP	GM			☐	☐

This will show:

Sales Statistics

Request Param. CUSTOMERTOP10

Data Source Statistic Data

Data Source DateTime 11/12/2024 2:19 PM

Global Filters Intercompany: No

Series 1 This Year - Date: 01/01/24-12/31/24

Series 2 Last Year - Date: 01/01/23-12/31/23

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

Code	Description	Quantity [1]	Amount GBP [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount GBP [2]	Cost GBP [2]	GM [2]	Picture
3000	The Furniture Shop UK GU2 7YQ Guildf...	1,540	63,817	36,966	42	13,860	574,355	332,698	42	
2020	Sportswear A/S DE-80807 Munchen	700	35,057	19,227	45	2,100	105,172	57,682	45	
2000	The Fashion Store UK CB1 2FB Cambridge	840	34,963	17,976	49	6,720	279,703	143,811	49	
2030	The Surf Shop Ltd. SE1 0AX London	560	23,299	14,253	39	4,704	195,708	119,727	39	
2040	Garment Company Ltd. US-FL 37125 Mil...	462	20,410	10,387	49	8,064	353,520	179,404	49	
2010	The Shoe Store Europe DE-80807 Munc...	350	15,810	8,693	45	6,300	284,580	156,473	45	
#OTHER	Total Other	0	0	0	0	0	0	0	0	
TOTAL	Total List	4,452	193,356	107,502	44	41,748	1,793,038	989,795	45	

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 **Setup No.** should also be available to choose for one of the TRIMIT Portals.

Show Picture

If you set a check mark here, a Picture of 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.

I.e., an Assortment consists of 1S, 2M, 2L, 1XL.

Explode Assortment set to *Yes*, will calculate with 6 Pieces.

Explode Assortment set to *No*, will calculate with 1 Assortment.

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 **Home, 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*:

Extended Sales Statistics Setup

DDITEM

Home Reports Automate Fewer options

Activate Deactivate

General

Setup No. DDITEM Top-down Misc.

Name Drill Down Item Top-down Value Default by Page Action Page

Status Active Top-down Number 0 Allow on Portals

Specification Show Others in Total

Calculated Value Revenue Show Picture

Detailed By Item Explode Assortment

Group By 1 Drill Down Code

Group By 2 Show in Alternative Currency

Group By 3 Unit Cost Document Line

Data Series New Line Delete Line Setup/Filter

Series Label	Incl. Sales Orders	Incl. Import Lines (WW)	Incl. Posted Sales Invoices	Incl. Posted 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
→							Quantity	Amount GBP	Discount GBP	Budget Amount				

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

Extended Sales Statistics Setup

TEST2

HomeReportsAutomateFewer options

StatisticsPrintE-MailShow ChartShow GaugeExcel FormattedExcel List

General

Setup No. TEST2

Name Orderbook

Status Active

Specification

Calculated Value Order Book

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 DDITEM

Show in Alternative Currency

Unit Cost Document Line

Data Series

New LineDelete LineSetup/Filter

Series Label	Incl. Sales Orders	Incl. Import Lines (www)	Incl. Posted Sales Invo...	Incl. Credit Mem...	Always Qu... 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	Cont. Filters
Current Day						11/5/2024	11/5/2024			Quantity	Amount GBP	Discount GBP	Budget Amount				

Start Date and **End Date** have been filled with the Date that the Data was created.

In addition, run the Statistics by clicking **Reports, Statistics**:

Sales Statistics

Request Param.

Request No. TEST2

Data Source Real-time

Global Filters Date: 11/05/24, Intercompany: No

Data Source DateTime 11/12/2024 3:09 PM

Series 1 Current Day

PrintE-MailShow ChartShow GaugeExcel FormattedShow in Analytics

Code	Description	Quantity	Amount GBP	Discount GBP	Budget Amount GBP	Picture
10000	Adatum Corporation CB1 2FB Cambridge	1,071	49,864	0	0	
2000	The Fashion Store UK CB1 2FB Cambridge	1,606	59,426	0	0	
2010	The Shoe Store Europe DE-80807 Munchen	128	768	0	0	
2020	Sportswear A/S DE-80807 Munchen	166	4,362	0	0	
3000	The Furniture Shop UK GU2 7YQ Guildford	1,677	102,000	0	0	
30000	School of Fine Art US-FL 37125 Miami	8	3,363	0	0	
40000	Alpine Ski House DE-80807 Munchen	3	370	0	0	
TOTAL	Total List	4,659	220,153	0	0	

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

Sales Statistics

Request Param.

Request No. TEST2

Data Source Real-time

Global Filters Date: 11/05/24, Intercompany: No, Sell-to Customer No.: 2010

Data Source DateTime 11/12/2024 3:18 PM

Series 1 Current Day

PrintE-MailExcel FormattedShow in Analytics

Code	Description	Quantity	Amount GBP	Discount GBP	Budget Amount GBP
21303002	Rose Shirt Yellow.S	4	24	0	0
21303003	Rose Shirt Yellow.M	6	36	0	0
21303004	Rose Shirt Yellow.L	8	48	0	0
21303005	Rose Shirt Yellow.XL	6	36	0	0
21303006	Rose Shirt Yellow.XXL	4	24	0	0
21303007	Rose Shirt Yellow.3XL	2	12	0	0
21306501	Rose Shirt Lawn Green.XS	2	12	0	0
21306502	Rose Shirt Lawn Green.S	4	24	0	0
21306503	Rose Shirt Lawn Green.M	6	36	0	0
21306504	Rose Shirt Lawn Green.L	8	48	0	0
21306505	Rose Shirt Lawn Green.XL	6	36	0	0
21306506	Rose Shirt Lawn Green.XXL	4	24	0	0
21306507	Rose Shirt Lawn Green.3XL	2	12	0	0
21309901	Rose Shirt Black.XS	2	12	0	0
21309902	Rose Shirt Black.S	4	24	0	0
21309903	Rose Shirt Black.M	6	36	0	0
21309904	Rose Shirt Black.L	8	48	0	0
21309905	Rose Shirt Black.XL	6	36	0	0
21309906	Rose Shirt Black.XXL	4	24	0	0
21309907	Rose Shirt Black.3XL	2	12	0	0
TOTAL	Total List	128	768	0	0

There can be differences between the two Statistic Totals based on rounding of the individual Amounts.

Show in Alternative Currency

This field is not visible by default: you can add it via **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																	
		New Line	Delete Line	Setup/Filters													
Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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-1Y	Quantity	Amount GBP	Discount GBP	Budget Amount			☐	☐
This Year	☒	☐	☒	☐	☐			-CY	CY	Quantity	Amount GBP	Discount GBP	Budget Amount			☐	☐

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

You can enter the values on 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 **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.

A checkmark in this field, can also include a *Quote*, *Invoice*, *Credit Memo*, *Blanket Order* or *Return Order*.

This depends on the [Filter Document Type](#).

Include Sales Import Lines (www)

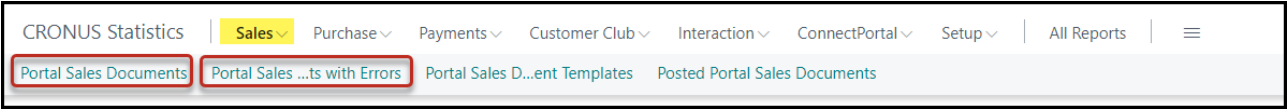
If you want **Sales Import Lines** from the TRIMIT Webshops/Portals and from the TRIMIT Integration (via External API) included in your Statistics, set a check mark here.

For TRIMIT Webshops/Portals, you can see these Lines (Documents) in the **Portal Sales Documents** and **Portal Sales Documents with Errors**:

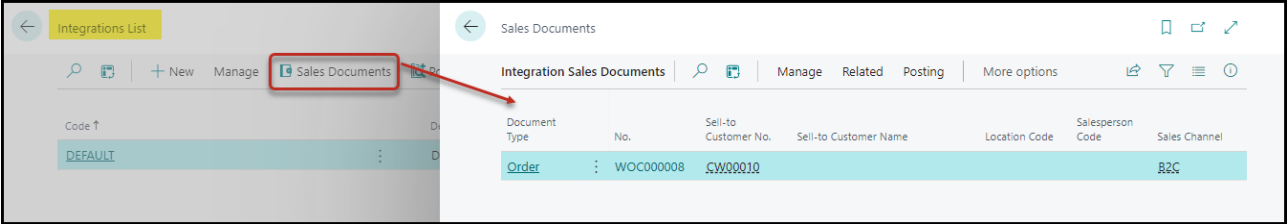
In the TRIMIT Small Business Role Center:

CRONUS Statistics	Finance	CRM	Sales	Purchase	Product Design	Logistics	Production	Portals	Posted Documents	All Reports	
Portal Profiles	Portal Activity log	Categories	Portal Sales ...ts with Errors	Portal Purchase Documents	Posted Portal...hase Documents						
Portal Newsletter	Portal Message	Portal Sales Documents	Posted Portal Sales Documents	Portal Purchase...s with Errors	Supplier Portal Messages						

In the TRIMIT Portal Administrator Role Center:



For TRIMIT Integration, you can see these Lines (Documents) in the **Sales Documents** of an Integration Code:



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 visible by default: you can add it via **Personalize**.

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

Lines														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	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 **Solution Customer Refund** will not get any Quantity back, while a Complaint with **Solution Customer 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 visible by default: 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 visible by default: 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.

Options	Options	Options	Options
→ Quantity	→ Amount GBP	→ Discount GBP	→ Budget Amount
Amount GBP	Cost GBP	Amount	Amount GBP
Cost GBP	Discount GBP	Cost GBP	Cost GBP
Discount GBP	Amount	Amount	Discount GBP
Amount	Cost	Discount	Amount
Cost	Discount	Budget Quantity	Cost
Discount	Budget Quantity	Budget Amount	Discount
Budget Quantity	Budget Cost	Budget Cost	Budget Quantity
Budget Amount	GM	GM	Budget Cost
Budget Cost	Budget GM	Budget GM	GM
GM	Net Weight	Net Weight	Budget GM
Budget GM	Gross Weight	Gross Weight	Net Weight
Net Weight	Volume	Volume	Gross Weight
Cost	CO2 (Kilogram)	(C1-C2)	Volume
Discount	Energy kWh	(C1 pct. of C2)	(C1-C2)
Budget Quantity	Water (Liters)	CO2 (Kilogram)	(C1 pct. of C2)
Budget Amount		Energy kWh	CO2 (Kilogram)
Budget Cost		Water (Liters)	Energy kWh
GM			Water (Liters)
Budget GM			
Net Weight			
Gross Weight			
Volume			
CO2 (Kilogram)			
Energy kWh			
Water (Liters)			

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*.

The *GBP* you see depends on your Local Currency, so in NL it would show *EUR*, or in DK, it could show *DKK*.

The *CO2 (Kilogram)*, *Energy kWh* and *Water (Liters)* depend on the [Sustainability VarDim Types 1 – 4](#) that you can enter in the FastTab **Sustainability**.

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 (GBP)**, **Cost LCY (GBP)** and **Discount LCY (GBP)** will always only show it in your Local 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 Budget Name** 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 Budget Name** 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 make 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

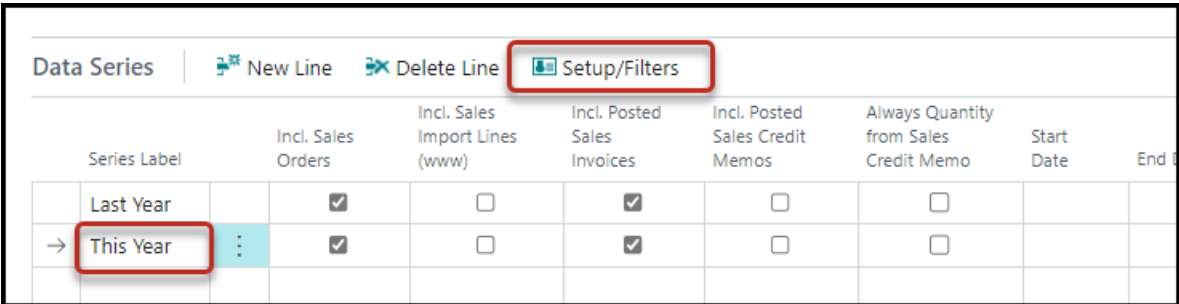
In this field, a check mark will be set by the system automatically if one of the Filters is filled via **Setup/Filters**.

Context Filters

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

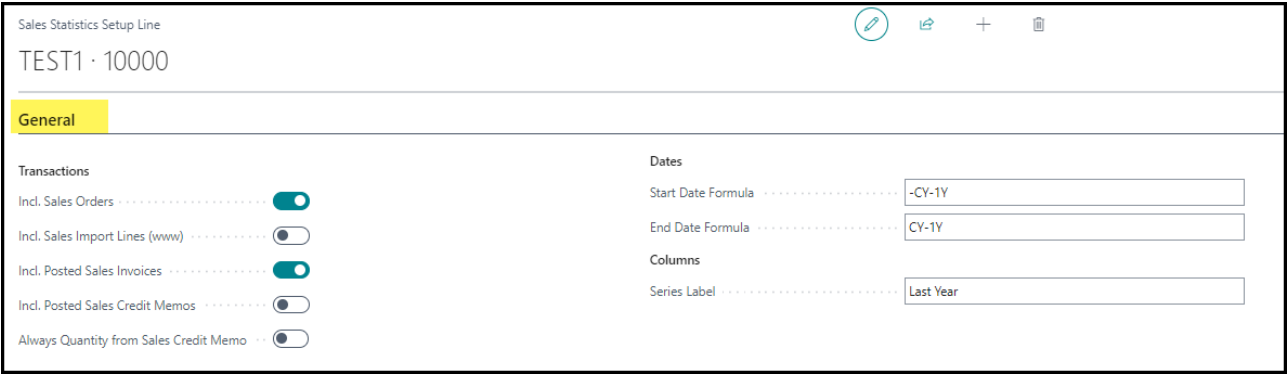
Data Series, Setup/Filters, FastTab General

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



Data Series							
Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted Sales Credit Memos	Always Quantity from Sales Credit Memo	Start Date	End Date
Last Year	☒	☐	☒	☐	☐		
→ This Year	☒	☐	☒	☐	☐		

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



Sales Statistics Setup Line

TEST1 · 10000

General

Transactions

Incl. Sales Orders ☒

Incl. Sales Import Lines (www) ☐

Incl. Posted Sales Invoices ☒

Incl. Posted Sales Credit Memos ☐

Always Quantity from Sales Credit Memo ☐

Dates

Start Date Formula

End Date Formula

Columns

Series Label

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

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

Data Series, Setup/Filters, 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.

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 are inherited from the first Data Series line.

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
Filter Campaign No.	Filter Statistics Group	Filter Forecast Item
Filter Intercompany		Filter Tariff Position
Filter Complaint		Filter Primary Vendor

Most of these filters are obvious, so will not be described in detail.

Filter Document Type

When **Include Sales Orders** is set to Yes in the Data Series, you can filter on specific **Document Types** of the Sales Headers:

You can use *Quote*, *Order*, *Invoice*, *Credit Memo*, *Blanket Order*, *Return Order*

Or the value 0 1 2 3 4 5

```
value(0; "Quote") { Caption = 'Quote'; }
value(1; "Order") { Caption = 'Order'; }
value(2; "Invoice") { Caption = 'Invoice'; }
value(3; "Credit Memo") { Caption = 'Credit Memo'; }
value(4; "Blanket Order") { Caption = 'Blanket Order'; }
value(5; "Return Order") { Caption = 'Return Order'; }
```

So, i.e., if you would fill the **Filter Document Type** with 0|1 or *Quote|Order*, it will include the Sales Quotes and the Sales Orders.

Brand Filter and Season Filter

These are the **Global Dimension 1** and **2**, which are called *Brand* and *Season* in the Demo Data of TRIMIT.

Therefore, the names of these Filters might differ.

Design Filter, Item Group Filter, Gender Filter, Item Statistics Group 4, Item Statistics Group 5

These are the names that have been given to the **Item Statistics Group 1 - 5** based on the Caption Class Setup.

Therefore, the names of these Filters might differ.

FastTab Charts

If your system includes one of the 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

Dashboard

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.

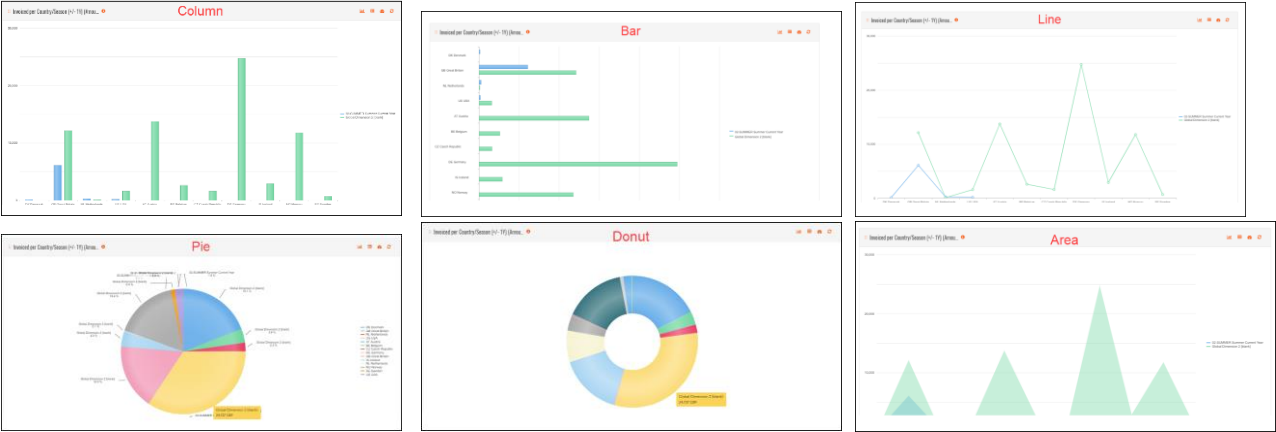


Chart Value

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 (GBP)** is the default:

Options

Description

Quantity

→ Amount GBP

Cost GBP

Discount GBP

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

CO2 (Kilogram)

Energy kWh

Water (Liters)

The *GBP* you see depends on your Local Currency, so in NL it would show *EUR*, or in DK, it could show *DKK*.

The *CO2 (Kilogram)*, *Energy kWh* and *Water (Liters)* depends on the [Sustainability VarDim Types 1 – 4](#) that you can enter in the FastTab **Sustainability**.

The *Column 1 – 4* represent the entries of the **Column 1 – 4** in the first Data Series.

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.

You can choose either *No.*, *Name* or both *No. & Name*.

Therefore, if **Detailed By** would be *Sell-to Customer*, 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*.

Therefore, if **Detailed By** would be *Master*, you can show either Master No., Master Description or both Master No. & Description.

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*.

Therefore, if **Detailed By** would be *Item*, you can show either Item No., Master Description or both Item No. & Description.

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.

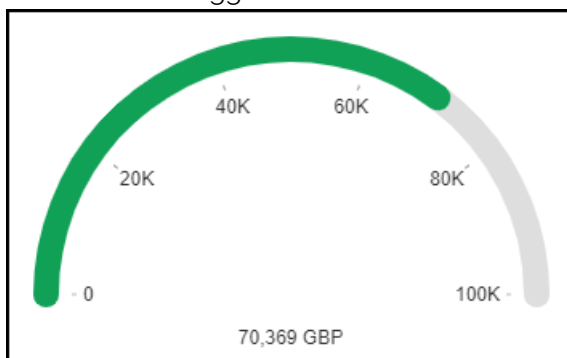
Threshold 2

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

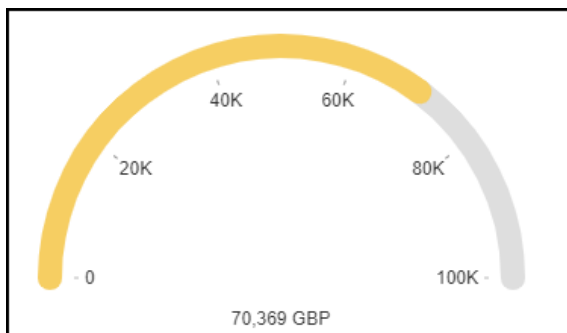
Range style

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

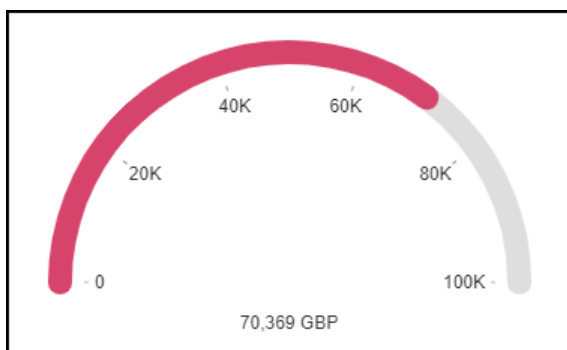
Unfavorable -> Favorable will show the Gauge from **Min. Value** to **Max. Value** where the total Value will show in **Red** if it is smaller than **Threshold 1**, in **Orange** if it is between **Threshold 1** and **Threshold 2** and in **Green** if it is bigger than **Threshold 2**.



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.

Variants

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 Sustainability

Sustainability	
Grouping	Values
Sustainability Grp 1 SUS_CERT	Sustainability VarDim Type 1 SUS_CO2
	Sustainability VarDim Type 2 SUS_KWH
	Sustainability VarDim Type 3 SUS_WATER
	Sustainability VarDim Type 4

Sustainability Grp 1

In this field you can select a **VarDim Type** of **Type Variant**, which represents the Sustainability Groups – i.e., the Certificates.

If filled, you can also choose it for **Detailed By, Group By 1, 2, 3** in the FastTab **General**.

In that case, in the options of these fields, you will see the **Name** of this VarDim Type.

Sustainability VarDim Type 1 – 4

In these fields, you can select a **VarDim Type** of **Type Dimension**, which represents the Values regarding Sustainability – i.e., Water, Energy, CO2, NO2, etc.

If filled, you can also choose them for the **Column 1 – 4** in the FastTab **Data Series**.

In that case, in the options of these fields, you will see the **Name** of this VarDim Type.

FastTab Advanced

Advanced	
Data Source Real-time	Default for Analytics ☒
Cache ☐	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 visible by default: you can add it via **Personalize**.

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

You can choose between the following two options: *Document Line* or *Adjust Unit Cost*.

If you choose the **Cost** or **Cost LCY (GBP)** as one of the Columns in your Statistic, with the option *Document Line*, it will take the Unit Cost from the Sales Line.

If you choose option *Adjusted Unit Cost*, it will determine 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.

Therefore, with *Document Line* it could look like:

Code	Description	Quantity	Amount GBP	Cost	GM
6000	Shirt	77	2,310	0	100
TOTAL	Total List	77	2,310	0	100

With *Adjusted Unit Cost*, it could look like:

Code	Description	Quantity	Amount GBP	Cost	GM
6000	Shirt	77	2,310	963	58
TOTAL	Total List	77	2,310	963	58

Keep in mind that if you choose *Adjusted Unit Cost*, the calculation of the Cost Amounts will take longer; that is also the reason we added a message if you choose this option:



NOTE: Unit Cost is set to Adjusted Unit Cost. We recommend not to do this as it will require extra resources and slow down the generation of the output

OK

FastTab Print

Print

Print as Matrix ☐

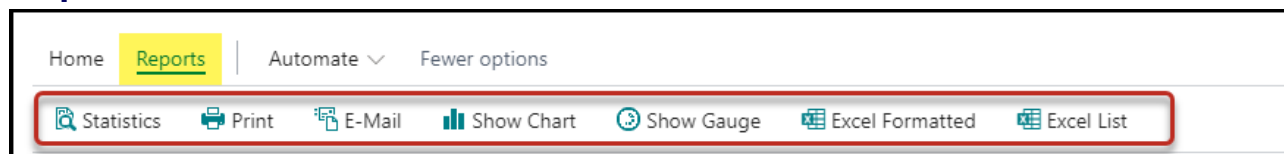
Print as Matrix

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 (GBP)*, the values in the Matrix are Sales Amounts.

Reports Actions



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

Extended Sales Statistics Setup

TEST1

Home Reports Automate Fewer options

Activate Deactivate

General

Setup No. TEST1

Name Posted last year and current year

Status Deactivated

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 New Line Delete Line Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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-1Y	Quantity	Amount	Cost GBP	GM			☐	☐
This Year	☒	☐	☒	☐	☐			-CY	CY	Quantity	Amount	Cost GBP	GM			☐	☐

Statistics

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

It will only show the Statistics of the first and second **Series Label**.

Sales Statistics

Request Param.

Request No. TEST1

Data Source Real-time

Data Source Date Time 11/13/2024 2:28 PM

Global Filters Intercompany: No

Series 1 Last Year - Date: 01/01/23..12/31/23

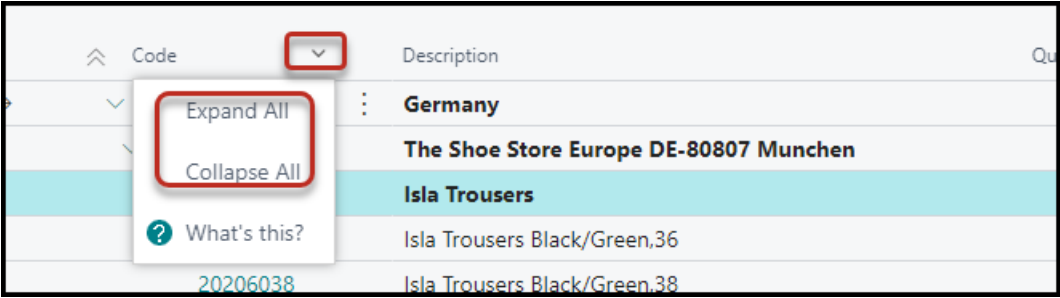
Series 2 This Year - Date: 01/01/24..12/31/24

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Code	Description	Quantity [1]	Amount USD [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount USD [2]	Cost GBP [2]	GM [2]
DE	Germany	8,400	600,713	214,159	45	1,347	86,873	31,366	44
2010	The Shoe Store Europe DE-80807 Munchen	6,300	438,615	156,476	45	478	25,550	9,164	45
2020	Isla Trousers	2,520	133,716	38,644	56	140	7,426	2,148	55
2130	Rose Shirt	0	0	0	0	128	1,184	472	39
2230	Jessica Coat	1,260	153,419	58,688	41	70	8,526	3,262	41
22302704	Jessica Coat Steelblue.4	180	21,917	8,384	41	10	1,218	466	41
22302706	Jessica Coat Steelblue.6	180	21,917	8,384	41	10	1,218	466	41
22302708	Jessica Coat Steelblue.8	180	21,917	8,384	41	10	1,218	466	41
22302710	Jessica Coat Steelblue.10	180	21,917	8,384	41	10	1,218	466	41
22302712	Jessica Coat Steelblue.12	180	21,917	8,384	41	10	1,218	466	41
22302714	Jessica Coat Steelblue.14	180	21,917	8,384	41	10	1,218	466	41
22302716	Jessica Coat Steelblue.16	180	21,917	8,384	41	10	1,218	466	41
2330	Uma Skirt	2,520	151,480	59,144	40	140	8,414	3,282	40
2020	Sportswear A/S DE-80807 Munchen	2,100	162,098	57,683	45	866	60,753	21,914	44
40000	Alpine Ski House DE-80807 Munchen	0	0	0	0	3	570	288	22
GB	Great Britain	25,284	1,617,951	596,235	43	7,294	513,780	201,621	40
10000	Adatum Corporation CB1 2FB Cambridge	0	0	0	0	1,071	76,849	24,425	51
MASTER [BL...]	Master [blank]	0	0	0	0	29	19,053	9,642	22
1928-S	AMSTERDAM Lamp	0	0	0	0	7	384	195	22
1968-S	MEXICO Swivel Chair, black	0	0	0	0	10	1,900	961	22

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 the above example.

Via clicking the **Toggle**, **Expand All** or **Collapse All**, you can expand or collapse all the groupings of the Statistics.



But you can also click on every grouping, to Expand/Collapse that specific grouping:

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
21003506	Lily Blouse Orange.XXL	5	180	0	0	0	0	0	0

Sales Statistics | Work Date: 9/6/2020

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

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From this page, 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 shown Data Series are shown in the **Global Filters** field and filters only valid for a specific Data Series are shown in the **Series 1** or **Series 2** where they belong.
I.e.

Data Series	New Line	Delete Line	Setup/Filters	Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted Sales Credit Memos	Always Quantity from Sales Credit Memo	Start Date	End Date	Start Date Formula	End Date Formula	Column
→				Last Year	☒	☐	☒	☐	☐			-CY-1Y	CY-1Y	Quar
				This Year	☒	☐	☒	☐	☐			-CY	CY	Quar

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	DEJUS	
Filter Sell-to Group		
Filter Sell-to Type		
Filter Statistics Group		
Item Related		
Filter Item No.		
Filter VarDim Y-Axis		
Filter Master No.	2020	
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		

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

Sales Statistics

Request Param. Request No.: TEST1 Data Source DateTime: 11/13/2024 2:49 PM Series 1: Last Year - Date: 01/01/23..12/31/23 Series 2: This Year - Date: 01/01/24..12/31/24

Data Source: Real-time Global Filters: Country/Region Code: DEJUS, Intercompany: ...

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Code	Description	Quantity [1]	Amount USD [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount USD [2]	Cost GBP [2]	GM [2]
DE	Germany	2,940	156,003	45,087	56	280	14,855	4,298	55
2010	The Shoe Store Europe DE-80807 Munchen	2,520	133,716	38,644	56	140	7,426	2,148	55
2020	Isla Trousers	2,520	133,716	38,644	56	140	7,426	2,148	55
20206036	Isla Trousers Black/Green,36	180	9,432	2,696	56	10	524	150	56
20206038	Isla Trousers Black/Green,38				56	10	524	150	56
20206040	Isla Trousers Black/Green,40				55	10	524	152	55
20206042	Isla Trousers Black/Green,42				55	10	524	152	55
20206044	Isla Trousers Black/Green,44				56	10	539	155	56
20206046	Isla Trousers Black/Green,46				56	10	539	155	56
20206048	Isla Trousers Black/Green,48				54	10	539	160	54
20209036	Isla Trousers Black/Grey,36				56	10	524	150	56
20209038	Isla Trousers Black/Grey,38	180	9,432	2,696	56	10	524	150	56
20209040	Isla Trousers Black/Grey,40	180	9,432	2,741	55	10	524	152	55
20209042	Isla Trousers Black/Grey,42	180	9,432	2,741	55	10	524	152	55
20209044	Isla Trousers Black/Grey,44	180	9,710	2,786	56	10	539	155	56
20209046	Isla Trousers Black/Grey,46	180	9,710	2,786	56	10	539	155	56
20209048	Isla Trousers Black/Grey,48	180	9,710	2,876	54	10	539	160	54
2020	Sportswear A/S DE-80807 Munchen	420	22,287	6,443	55	140	7,429	2,150	55
2020	Isla Trousers	420	22,287	6,443	55	140	7,429	2,150	55
US	USA	2,520	133,716	38,644	56	140	7,426	2,148	55
2040	Garment Company Ltd. US-FL 37125 Miami	2,520	133,716	38,644	56	140	7,426	2,148	55
2020	Isla Trousers	2,520	133,716	38,644	56	140	7,426	2,148	55
TOTAL	Total List	5,460	289,719	83,731	56	420	22,281	6,446	55

Filters: Country/Region Code: DEJUS, Intercompany: No, Master No.: 2020

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.

In the fields **Series 1** and **Series 2**, you will see the filters that are applicable for those specific Series (if they differ from each other) and the Date Filters based on the **Start-/End Date** or the **Start-/End Date Formula**.

Print

With the page action **Print**, you can print the Statistics. When you click the action **Print**, you will go to the **Extended Sales Statistics** report where all fields are filled based on 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 using this action 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 **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 fields regarding charts in [FastTab Charts](#).

Show Gauge

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

With **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 fields 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 Excel. The Excel Sheet will be formatted with the same Columns as set up in the Data Series and extended with Columns indicating which **Detailed By** and **Group By 1, 2, 3** values the Lines are related to.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
2	Date 11/14/24																			
3																				
4																				
5																				
6	Country/Region	Text	Sell-to Customer No.	Text	Master	Text	Item	Text												
7	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206036	Isla Trousers Black/Green,36												
8	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206038	Isla Trousers Black/Green,38												
9	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206040	Isla Trousers Black/Green,40												
10	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206042	Isla Trousers Black/Green,42												
11	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206044	Isla Trousers Black/Green,44												
12	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206046	Isla Trousers Black/Green,46												
13	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206048	Isla Trousers Black/Green,48												
14	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209036	Isla Trousers Black/Grey,36												
15	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209038	Isla Trousers Black/Grey,38												
16	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209040	Isla Trousers Black/Grey,40												
17	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209042	Isla Trousers Black/Grey,42												
18	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209044	Isla Trousers Black/Grey,44												
19	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209046	Isla Trousers Black/Grey,46												
20	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209048	Isla Trousers Black/Grey,48												
21	DE	Germany	2020	Sportswear AVS DE-80807 Munchen	2020	Isla Trousers	20209036	Isla Trousers Black/Grey,36												

The **GBP** you see depends on the Local Currency. The **USD** you see depends on the **Show the Alternative Currency**.

Excel List

With the page action **Excel List**, you can calculate the Statistics according to all the setup fields and export it to Excel. 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.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	ITEM STATISTICS																			
2	Date 11/14/24																			
3																				
4																				
5																				
6	Year	Country/Region	Text	Sell-to Customer No.	Text	Master	Text	Item	Text	Amount	Cost	Discount	Amount	Discount	Budget	Budget Cost	Net	Gross	Volume	CO2 (Kilogram)
7	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206036	Isla Trousers Black/Green,36	180	340	149,8	0	524,03	230,88	0	0	0	102	489,8
8	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206038	Isla Trousers Black/Green,38	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
9	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206040	Isla Trousers Black/Green,40	180	6120	2741,4	0	9432,48	4225,2	0	0	126	144	0
10	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206042	Isla Trousers Black/Green,42	180	6120	2741,4	0	9432,48	4225,2	0	0	126	144	0
11	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206044	Isla Trousers Black/Green,44	180	6120	2741,4	0	9432,48	4225,2	0	0	126	144	0
12	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206046	Isla Trousers Black/Green,46	180	6120	2741,4	0	9432,48	4225,2	0	0	126	144	0
13	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20206048	Isla Trousers Black/Green,48	180	6120	2741,4	0	9432,48	4225,2	0	0	126	144	0
14	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209036	Isla Trousers Black/Grey,36	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
15	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209038	Isla Trousers Black/Grey,38	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
16	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209040	Isla Trousers Black/Grey,40	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
17	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209042	Isla Trousers Black/Grey,42	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
18	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209044	Isla Trousers Black/Grey,44	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
19	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209046	Isla Trousers Black/Grey,46	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
20	2020	DE	Germany	2010	The Shoe Store Europe DE-80807 Munchen	2020	Isla Trousers	20209048	Isla Trousers Black/Grey,48	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0
21	2020	DE	Germany	2020	Sportswear AVS DE-80807 Munchen	2020	Isla Trousers	20209036	Isla Trousers Black/Grey,36	180	6120	2696,4	0	9432,48	4155,84	0	0	126	144	0

The **GBP** you see depends on the Local Currency. The **USD** you see depends on the **Show the Alternative Currency**.

The **CO2 (Kilogram)**, **Energy kWh** and **Water (Liters)** depend on the **Sustainability VarDim Type 1 - 4**.

If you have chosen a **Show the Alternative Currency**, the **Amount LCY (GBP)**, **Cost LCY (GBP)**, **Discount LCY (GBP)**, will also be exported in this Currency.

In that case, also the **Budget Amount** and **Budget Cost** will be exported in this Currency.

How to use Extended Sales Statistics Setup Nos.

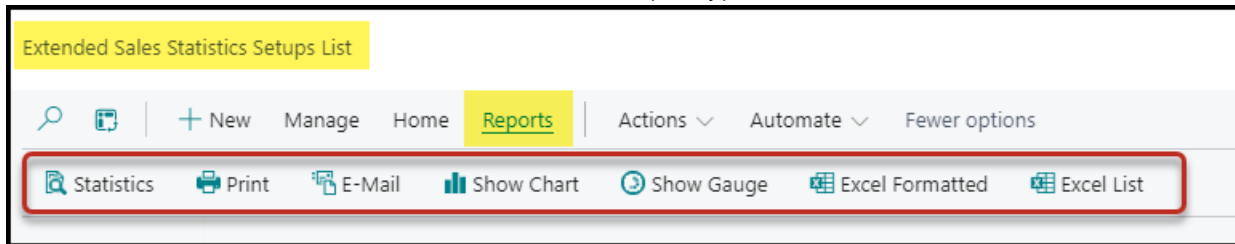
There are four ways of using the **Sales Statistics Setup Nos.**:

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

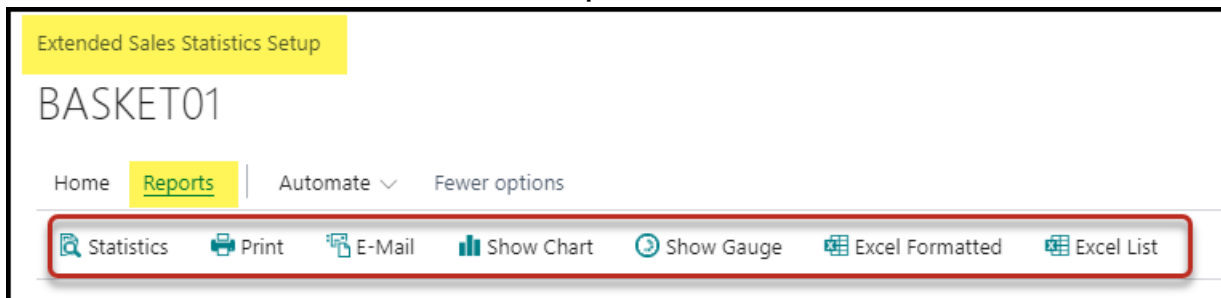
Via Extended Sales Statistics Setup

In the **Extended Sales Statistics Setup List**, you can click one of the actions [Statistics](#), [Print](#), [E-Mail](#), [Show Chart](#), [Show Gauge](#), [Excel Formatted](#) or [Excel List](#) to execute the Statistics.

Follow the links to read more about the different output types.

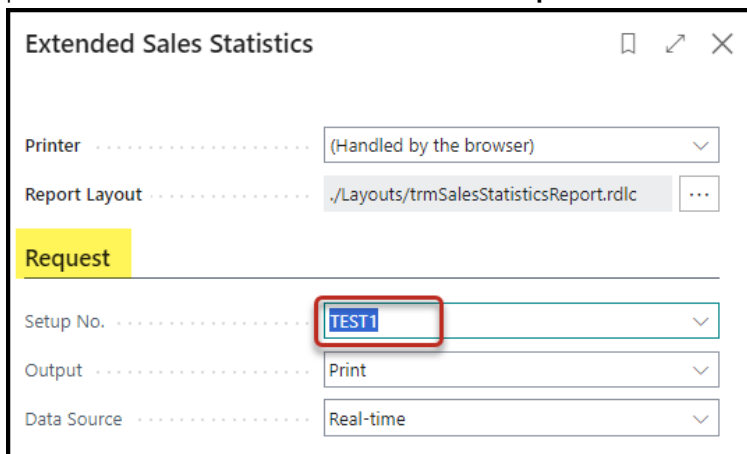


If you click **+ New** or **Manage, Edit** or **Manage, View**, you will see that the output actions are also available in the **Extended Sales Statistics Setup**.



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 a 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 a portal page.

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

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.

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** of the Statistics Overview cannot be the same as one of the **Extended Sales Statistics Setup Nos.**

The **Default Output** can only be *Chart* or *Gauge*.

In the Portal Profile of the Sales Agent Portal or B2B Webshop, you can choose a **Basket Statistics** – which is a Statistics Overview.

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

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 =.

Data Series | New Line | Delete Line | **Setup/Filters**

Sales Statistics Setup Line

CUSTOMEREX · 10000

General

Filters

General Filters

Filter Document Type

Filter Document No.

Filter Sales Channel

Customer Related

Filter Sell-to Customer No. =

Filter Bill-to

Filter Company Group

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**.

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	

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

Request Param.

Request No. CUSTOMEREX

Data Source Real-time

Data Source DateTime 11/15/2024 1:27 PM

Global Filters

Intercompany: No Sell-to Customer No.: 2000

Series 1 - Date: 07/01/23..10/01/23

Series 2 - Date: 10/01/23..01/01/24

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Show in Analytics

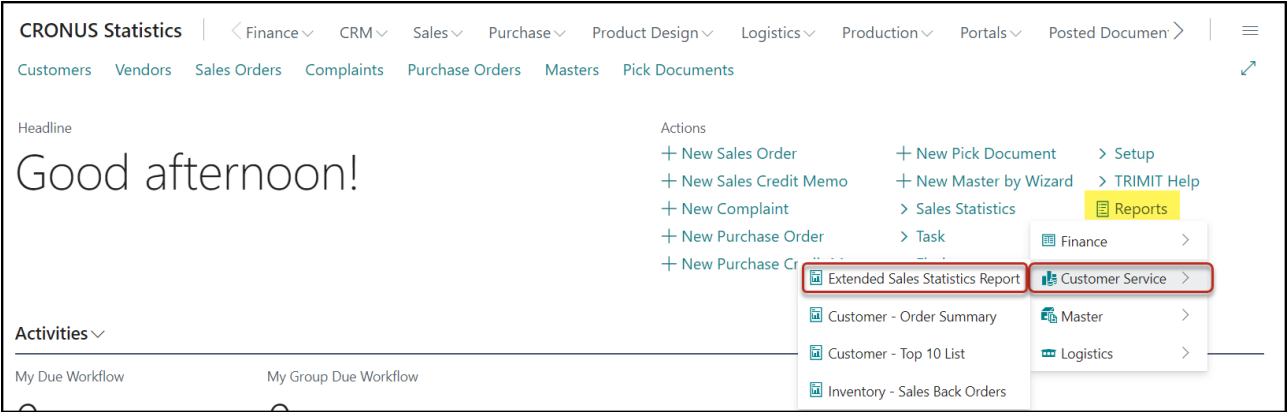
Code	Description	Cost GBP [1]	Amount GBP [1]	GM [1]	Quantity [1]	Cost GBP [2]	Amount GBP [2]	GM [2]	Quantity [2]
2000	The Fashion Store UK CB1 2FB Cambrid...	35,953	69,926	49	1,680	53,929	104,889	49	2,520
TOTAL	Total List	35,953	69,926	49	1,680	53,929	104,889	49	2,520

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

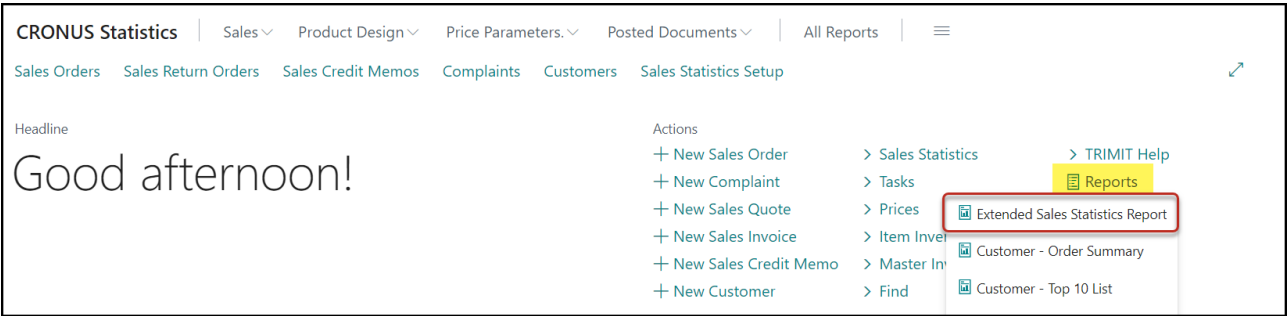
But it might still give you a Statistics not only based on the Sales Order, because you did not set the **Filters** in the individual **Extended Sales Statistics Setup Nos.**

Extended Sales Statistics Report

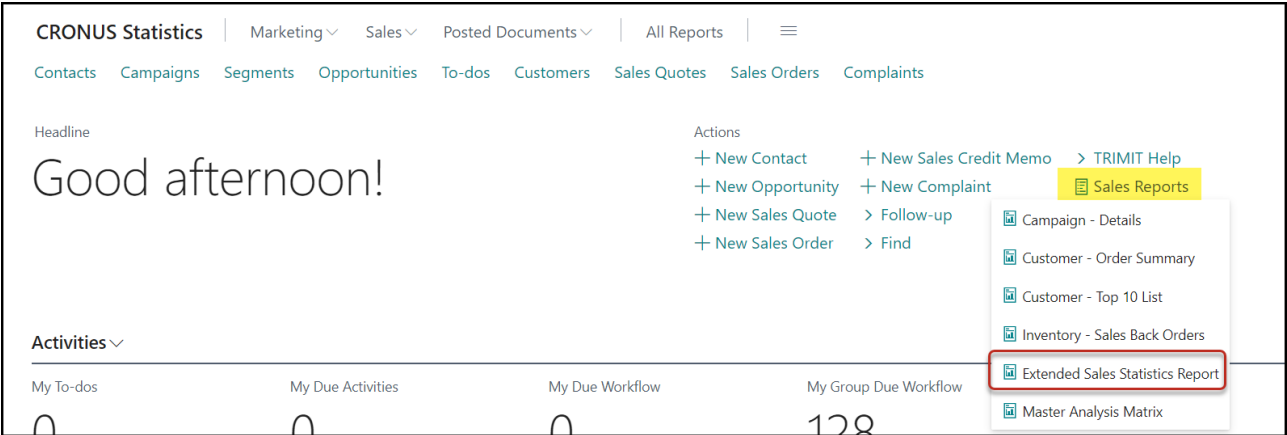
The **Extended Sales Statistics** report can be found via several options:
In the **TRIMIT Small Business** Role Center, you can start it via:



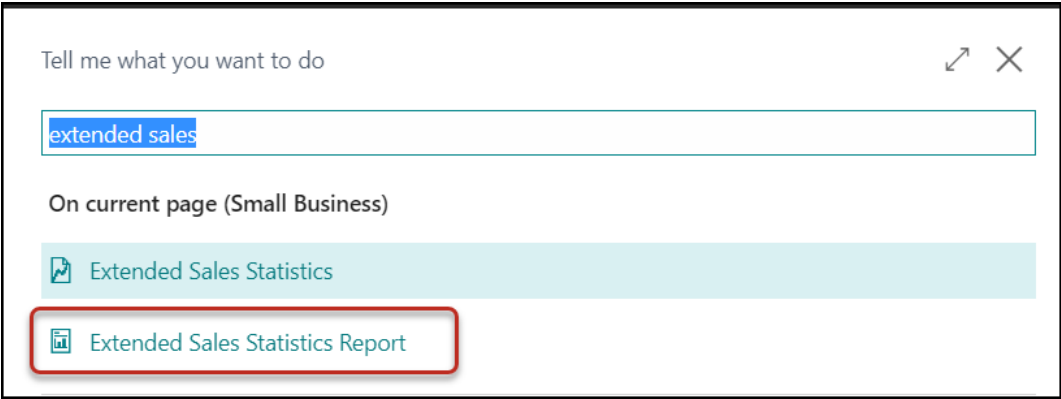
In the **TRIMIT Customer Service** Role Center, you start it via:



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 a Statistics that you only want to run for a single time and where you do not need the additional setup fields available from an **Extended Sales Statistics Setup**.

The **Extended Sales Statistics** report is also used when you click [Print](#) in a **Setup No.** In that case the setup fields are automatically filled in the Request Page of the Report.

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 this will automatically fill 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

If you did select a **Setup No.** these parameters will be filled based on the **Setup No.** / First Data Series and cannot be changed.

The **Start Date** can be based on the **Start Date** or the **Start Date Formula** of the First Data Series of the chosen **Setup No.**

The **End Date** can be based on the **End Date** or the **End Date Formula** of the First Data Series of the chosen **Setup No.**

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](#).

Print Period 1 Column 1 - 4

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

Series 2

Include Sales Orders

Include Sales Invoices

Include Sales Credit Memos

Start Date

End Date

Columns

Print Period 2 Column 1

Quantity

Print Period 2 Column 2

Amount LCY

Print Period 2 Column 3

Discount LCY

Print Period 2 Column 4

Budget Amount

If you did select a **Setup No.** these parameters will be filled based on the **Setup No.** / Second Data Series and cannot be changed.

The **Start Date** can be based on the **Start Date** or the **Start Date Formula** of the Second Data Series of the chosen **Setup No.**

The **End Date** can be based on the **End Date** or the **End Date Formula** of the Second Data Series of the chosen **Setup No.**

Rest of the parameters are comparable with the same parameters in FastTab **Series 1.**

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.

See [Data Series, Setup/Filters, FastTab Filters](#) for more details regarding the Filters.

FastTab Filter: Filter Customers/Item

Filter: Filter Customer

× Customer Posting Group

▼

+ Filter...

Filter totals by:

+ Filter...

Filter: Filter Item

× Inventory Posting Group

▼

+ Filter...

You can set a filter on any field of the Customer and/or Item.

GLOBAL DIMENSION 2 STATISTICS
CRONUS Statistics
Global Filters: Date: 01/01/23..01/01/25, Intercompany: No

November 15, 2024
Page 1
ADMIN

Country/Region / Global Dimension 2	01/01/23..01/01/25							
	Amount	Amount GBP	Amo-Amo	Quantity				
DE Germany	-	-	-	-	-	-	-	-
Global Dimension 2 [blank]	110,860	110,860	-	3,220	-	-	-	-
02-SUMMER Summer Current Year	165,340	165,340	-	3,780	-	-	-	-
03-FALL Fall Current Year	164,419	164,419	-	2,450	-	-	-	-
Total DE Germany	440,619	440,619	-	9,450	-	-	-	-
GB Great Britain	-	-	-	-	-	-	-	-
Global Dimension 2 [blank]	607,677	607,677	-	16,128	-	-	-	-
02-SUMMER Summer Current Year	283,682	283,682	-	7,490	-	-	-	-
03-FALL Fall Current Year	280,486	280,486	-	4,606	-	-	-	-
Total GB Great Britain	1,171,845	1,171,845	-	28,224	-	-	-	-
US USA	-	-	-	-	-	-	-	-
Global Dimension 2 [blank]	91,580	91,580	-	2,660	-	-	-	-
02-SUMMER Summer Current Year	282,350	282,350	-	5,866	-	-	-	-
Total US USA	373,930	373,930	-	8,526	-	-	-	-
Total List	1,986,394	1,986,394	-	46,200	-	-	-	-

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):

Extended Sales Statistics Setup

EXP_CUST_MASTER

Home Reports Automate Fewer options

Activate Deactivate

General

Setup No. EXP_CUST_MASTER

Name Expected Revenue per Customer/Master

Status Active

Specification

Calculated Value Revenue

Detailed By Master

Group By 1 Sell-to Customer No.

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

Data Series

New Line Delete Line Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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	Cont... Filters
→ Current Month	☒	☒	☒	☐	☐			-CM	CM	Quantity	Amount GBP	Cost GBP	GM			☐	☐
Next Months this year	☒	☒	☒	☐	☐			CM+1D	CY	Quantity	Amount GBP	Cost GBP	GM			☐	☐

Sales Statistics

Request Param.

Request No. EXP_CUST_MASTER

Data Source Real-time

Data Source DateTime 11/18/2024 11:48 AM

Global Filters

Intercompany: No

Series 1 Current Month - Date: 01/01/24-01/31/24

Series 2 Next Months this year - Date: 02/01/24-12/31/24

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

Code	Description	Quantity [1]	Amount GBP [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount GBP [2]	Cost GBP [2]	GM [2]
10000	Adatum Corporation CB1 2FB Cambridge	0	0	0	0	1,071	49,865	24,425	51
	MASTER (BLAN...	0	0	0	0	29	12,363	9,642	22
	2100 Lily Blouse	0	0	0	0	1,042	37,502	14,783	61
2000	The Fashion Store UK CB1 2FB Cambridge	840	34,963	17,976	49	1,606	59,427	32,402	46
	2000 Olivia Trousers	210	8,415	3,317	61	0	0	0	0
	2020 Isla Trousers	210	7,230	3,221	55	40	1,373	612	55
	2100 Lily Blouse	0	0	0	0	405	14,576	5,746	61
	2120 Sophia Shirt	0	0	0	0	279	9,762	5,859	40
	2200 Grace Bomber	0	0	0	0	230	8,278	4,622	44
	2210 Poppy Blazer	210	11,128	6,510	42	30	1,500	840	44
	2330 Uma Skirt	210	8,190	4,928	40	612	23,868	14,683	39
	2410 Katie Scarf	0	0	0	0	10	70	40	43
2010	The Shoe Store Europe DE-80807 Munchen	350	15,810	8,692	45	128	768	473	38
2020	Sportswear A/S DE-80807 Munchen	700	35,057	19,227	45	166	4,362	2,684	39
2030	The Surf Shop Ltd. SE1 OAX London	560	23,299	14,253	39	0	0	0	0
2040	Garment Company Ltd. US-FL 37125 Miami	462	20,410	10,386	49	0	0	0	0
3000	The Furniture Shop UK GU2 7YQ Guildford	1,540	63,817	36,967	42	1,677	102,000	75,576	26
30000	School of Fine Art US-FL 37125 Miami	0	0	0	0	8	3,363	2,624	22
40000	Alpine Ski House DE-80807 Munchen	0	0	0	0	3	370	288	22
TOTAL	Total List	4,452	193,356	107,501	44	4,659	220,155	138,472	37

Incoming Orders per Customer with Subtotals per Salesperson

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

Extended Sales Statistics Setup

INC_CUST_SALESP

Home Reports Automate Fewer options

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

General

Setup No. INC_CUST_SALESP

Name Incoming per Salesperson / Customer

Status Active

Specification

Calculated Value Order Intake

Detailed By Sell-to Customer No.

Group By 1 Salesperson

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

Data Series

New Line Delete Line Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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	Cont... Filters
→ Last Year	☒	☐	☐	☐	☐			-CY-1Y	-CY-1D	Quantity	Amount GBP	Cost GBP	GM			☐	☐
This Year	☒	☒	☐	☐	☐			-CY	CY	Quantity	Amount GBP	Cost GBP	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

Request Param.

Request No. INC_CUST_SALESP

Data Source Real-time

Data Source DateTime 11/18/2024 2:06 PM

Global Filters

Intercompany: No

Series 1 Last Year - Date: 01/01/23..12/31/23

Series 2 This Year - Date: 01/01/24..12/31/24

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

Code	Description	Quantity [1]	Amount GBP [1]	Cost GBP [1]	GM [1]	Quantity [2]	Amount GBP [2]	Cost GBP [2]	GM [2]
SALESPERSON...	Salesperson [blank]	0	0	0	0	40	16,096	12,554	22
10000	Adatum Corporation CB1 2FB Cambridge	0	0	0	0	29	12,363	9,642	22
30000	School of Fine Art US-FL 37125 Miami	0	0	0	0	8	3,363	2,624	22
40000	Alpine Ski House DE-80807 Munchen	0	0	0	0	3	370	288	22
JO		0	0	0	0	1,336	42,632	17,940	58
10000	Adatum Corporation CB1 2FB Cambridge	0	0	0	0	1,042	37,502	14,783	61
2010	The Shoe Store Europe DE-80807 Munchen	0	0	0	0	128	768	473	38
2020	Sportswear A/S DE-80807 Munchen	0	0	0	0	166	4,362	2,684	39
JR	John Roberts	0	0	0	0	3,283	161,426	107,978	33
2000	The Fashion Store UK CB1 2FB Cambridge	0	0	0	0	1,606	59,426	32,402	46
3000	The Furniture Shop UK GU2 7YQ Guildford	0	0	0	0	1,677	102,000	75,576	26
TOTAL	Total List	0	0	0	0	4,659	220,154	138,472	37

Orders of Today including Matrix

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

Extended Sales Statistics Setup

ORDERS_TODAY

Home

Reports

Automate

Fewer options

Statistics

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Excel List

General

Setup No. ORDERS_TODAY

Name Orders of Today

Status Active

Specification

Calculated Value Order Intake

Detailed By Item

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

Data Series

New Line

Delete Line

Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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	Cont... Filters
→ Today	☒	☒	☐	☐	☐			CD	CD	Amount GBP	Cost GBP	(C1 pct. of C2)	Quantity			☐	☐

Print

Print as Matrix

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

Sales Statistics

Request Param.

Request No. ORDERS_TODAY

Data Source Real-time

Data Source DateTime 11/16/2024 3:35 PM

Global Filters

Date: 11/05/24. Intercompany: No

Series 1 Today

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Show in Analytics

Code	Description	Amount GBP			
20206036	Isla Trousers Black/Green.36	68	30	227	2
20206038	Isla Trousers Black/Green.38	136	60	227	4
20206040	Isla Trousers Black/Green.40	204	91	224	6
20206042	Isla Trousers Black/Green.42	204	91	224	6
20206044	Isla Trousers Black/Green.44	140	62	226	4
20206046	Isla Trousers Black/Green.46	70	31	226	2
20206048	Isla Trousers Black/Green.48	70	32	219	2
20209036	Isla Trousers Black/Grey.36	34	15	227	1
20209038	Isla Trousers Black/Grey.38	68	30	227	2
20209040	Isla Trousers Black/Grey.40	102	46	222	3
20209042	Isla Trousers Black/Grey.42	102	46	222	3
20209044	Isla Trousers Black/Grey.44	70	31	226	2
20209046	Isla Trousers Black/Grey.46	70	31	226	2
20209048	Isla Trousers Black/Grey.48	35	16	219	1
21002002	Lily Blouse Royal Blue.S	1,008	360	280	28

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

ITEM ORDER INTAKE STATISTICS										November 18, 2024				
CRONUS Statistics										Page 1				
Global Filters: Date: 11/05/24, Intercompany: No										ADMIN				
Item	Today - 11/05/24								Amount GBP	Today - 11/05/24			Quantity	
	Amount GBP									Cost GBP	Amo	% of Cos		
2020 Isla Trousers	36	38	40	42	44	46	48							
Black/Green	68	136	204	204	140	70	70		892					
Black/Grey	34	68	102	102	70	70	35		481					
Total 2020 Isla Trousers									1373.00	612	224.34640522875	817	40	
2100 Lily Blouse	XS	S	M	L	XL	XXL	3XL							
Royal Blue		1,008	1,979	2,015	1,080	504	36		6,622					
Light Blue		36	72	72	36				216					
Yellow	900	2,699	3,599	2,699	2,699	1,800			14,396					
Orange		612	1,404	1,404	612	432			4,464					
Red	36	828	1,260	1,656	1,260	864	72		5,976					
Pink		180	180	180	360	360	360		1,620					
Black	432	2,915	4,679	5,255	4,643	3,095	648		21,667					
Total 2100 Lily Blouse									54961.00	21697	253.31151772134	3965	1527	
2120 Sophia Shirt	XS	S	M	L	XL	XXL	3XL							
Royal Blue	432	468	504	540	504	468	432		3,348					
Light Blue	432	468	504	540	504	468	432		3,348					
Black	396	429	462	495	462	429	396		3,069					
Total 2120 Sophia Shirt									9765	5859	166.66666666666666	6667	279	
2130 Rose Shirt	AA	BB	CC	DD	EE	XS	S	M	L					
White	L2	XL	XXL	3XL			18	36	54	72	288			
Yellow	L2	54	36	18			18	36	54	72	288			
Lawn Green	L2	54	36	18			18	36	54	72	288			
Black	L2	54	36	18			18	36	54	72	288			
Total 2130 Rose Shirt	L2	54	36	18										
									1152.00	704	163.63636363636363	3636	192	

Expected Revenue with Subtotals and Budgets

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

✎

🔗

+

🗑

✓ Saved

🔗

🔍

Sales Budget Overview

◀ Previous Set ▶ Previous Column ▶ Next Column ▶ Next Set ▶ Next Period ▶ Previous Period | More options

General

Item Budget Name

2024

...

View by

Month

▼

Show as Lines

Customer

...

Rounding Factor

None

▼

Show as Columns

Period

...

Show Column Name

☒

Show Value as

Sales Amount

▼

Sales Budget Overview Matrix

Code	Name	Budgeted Quantity	Budgeted Sales Amount	Budgeted Cost Amount	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024	Jun 2024	Jul 2024	Aug 2024
2000	The Fashion Store UK	0.00	23,000.00	0.00	16,000.00	5,000.00	2,000.00					
2010	The Shoe Store Europe	0.00	800.00	0.00	500.00	200.00	100.00					
2020	Sportswear A/S	0.00	470.00	0.00	320.00	100.00	50.00					
2030	The Surf Shop Ltd.	0.00	0.00	0.00								
2040	Garment Company Ltd.	0.00	0.00	0.00								
→ 3000	The Furniture Shop UK	0.00	65,000.00	0.00	50,000.00	10,000.00	5,000.00					

Filters

Date Filter

01/01/24..12/31/24

...

Budget Dimension 2 Filter

...

Customer Filter

2000|2010|2020|2030|2040|3000|3010|3020|3030

...

Budget Dimension 3 Filter

...

Item Filter

...

Brand Filter

...

Budget Dimension 1 Filter

...

Season Filter

...

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

✎

🔗

+

🗑

✓ Saved

🔗

🔍

Extended Sales Statistics Setup

REV_CUST_MASTER_BUDG

Home Reports | Automate ▾ Fewer options

🟢 Activate ! Deactivate

General

Setup No.

REV_CUST_MASTER_BUDG

Top-down

Top-down Value

Name

Revenue per Customer/Master incl. Budget

Top-down Number

0

Status

Active

Show Others in Total

☒

Specification

Revenue

Misc.

Default by Page Action

Page

Detailed By

Master

Allow on Portals

☒

Group By 1

Sell-to Customer No.

Show Picture

☒

Group By 2

Explode Assortment

☒

Group By 3

Drill Down Code

Show in Alternative Currency

Data Series

🔗 New Line

🗑 Delete Line

🔗 Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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	Cont... Filters
→	☒	☒	☒	☒	☒			-CY	CY	Quantity	Amount GBP	Cost GBP	Budget Amount 2024			☒	☒

Sales Statistics

✓ Saved

Request Param.

Request No.REV_CUST_MASTER_BUDG

Data SourceReal-time

Data Source DateTime11/18/2024 3:56 PM

Global Filters

Date: 01/01/24..12/31/24. Intercompany: No. Sales Budget: 2024

Series 1

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Show in Analytics

Code	Description	Quantity	Amount GBP	Cost GBP	Budget Amount GBP
> 10000	Adatum Corporation CB1 2FB Cambridge	1,071	49,865	24,425	0
> 2000	The Fashion Store UK CB1 2FB Cambridge	2,446	94,390	50,378	23,000
MASTER [BLANK]	Master [blank]	0	0	0	23,000
2000	Olivia Trousers	210	8,415	3,317	0
2020	Isla Trousers	250	8,603	3,833	0
2100	Lily Blouse	405	14,576	5,746	0
2120	Sophia Shirt	279	9,762	5,859	0
2200	Grace Bomber	230	8,278	4,622	0
2210	Poppy Blazer	240	12,628	7,350	0
2330	Uma Skirt	822	32,058	19,611	0
2410	Katie Scarf	10	70	40	0
> 2010	The Shoe Store Europe DE-80807 Munchen	478	16,578	9,165	800
MASTER [BLANK]	Master [blank]	0	0	0	800
2020	Isla Trousers	140	4,820	2,147	0
2130	Rose Shirt	128	768	473	0
2230	Jessica Coat	70	5,530	3,260	0
2330	Uma Skirt	140	5,460	3,285	0
> 2020	Sportswear A/S DE-80807 Munchen	866	39,419	21,911	470
> 2030	The Surf Shop Ltd. SE1 OAX London	560	23,299	14,253	0
> 2040	Garment Company Ltd. US-FL 37125 Miami	462	20,410	10,386	0
> 3000	The Furniture Shop UK GU12 7VO Guildford	3,217	165,817	112,542	65,000

Top 10 Masters

If you want to know the Top 10 of your sold Masters.
The **Setup No.** could look like:

Extended Sales Statistics Setup

MASTERTOP10

Home Reports Automate Fewer options

Activate Deactivate

General

Setup No. MASTERTOP10

Name Master Top 10 Orders and Invoices

Status Active

Specification

Calculated Value Revenue

Detailed By Master

Group By 1

Group By 2

Group By 3

Top-down

Top-down Value Amount GBP

Top-down Number 10

Show Others in Total

Misc.

Default by Page Action Page

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code DDMaster-CUST

Show in Alternative Currency

Data Series

New Line Delete Line Setup/Filters

Series Label	Incl. Sales Orders	Incl. Sales Import Lines (www)	Incl. Posted Sales Invoices	Incl. Posted 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	Cont... Filters
→								-CY	CY	Quantity	Amount GBP	Cost GBP	GM				

Sales Statistics

Request Param.

Request No. MASTERTOP10

Data Source Statistic Data

Data Source DateTime 11/12/2024 2:19 PM

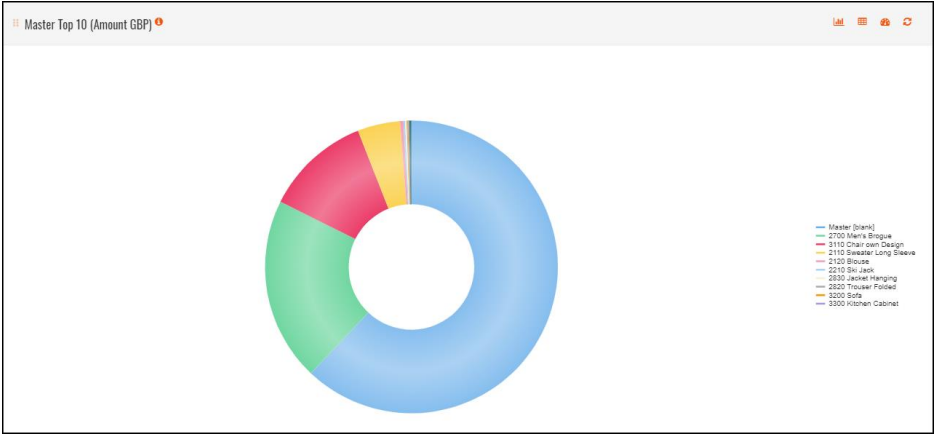
Global Filters Date: 01/01/24..12/31/24, Intercompany: No

Series 1

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

Code	Description	Quantity	Amount GBP	Cost GBP	GM
5010	Chair Pollux	1,595	98,121	73,725	25
2100	Lily Blouse	1,807	65,034	25,745	60
2330	Uma Skirt	1,484	57,876	35,200	39
2020	Isla Trousers	1,090	37,523	16,716	56
2210	Poppy Blazer	660	34,883	20,370	42
2310	Freya Dress	322	17,710	9,660	46
2030	Ella Trousers	420	16,800	9,438	44
2230	Jessica Coat	210	16,590	9,781	41
2010	Amelia Trousers	420	16,380	13,860	15
MASTER [BLANK]	Master [blank]	40	16,096	12,554	22
#OTHER	Total Other	1,063	36,496	18,926	48
TOTAL	Total List	9,111	413,509	245,975	41

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



This picture is based on a Demo Site, not based on the data of the TRIMIT Data and Test App.

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 last 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:

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

GAUGETEST

Home Reports

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

General

Setup No. GAUGETEST

Name This Year as % of Last Year

Status Active

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

Data Series

New Line Delete Line Setup/Filters

Series Label	Incl. Sales Ord.	Incl. Sales Lines	Incl. Sales Imp.	Incl. Sales Credit	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge #1	Filters	Cor Filt
Last Year					CY-2Y+1D	CY-1Y	Quantity	Amount LCY	Discount LCY	Budget Amount		Threshold		
This Year					CY-1Y+1D	CY	Quantity	Amount LCY	Discount LCY	Budget Amount		Value		

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

Gauge

Gauge Value Type Percent

Threshold 1 50

Threshold 2 125

Min Value 0

Max Value 200

Range Style Unfavorable -> Favorable

Sales Statistics | Work Date: 9/6/2020

Request Param. GAUGETEST

Data Source Real-time

Data Source DateTime 11/18/2024 4:28 PM

Global Filters Intercompany: No

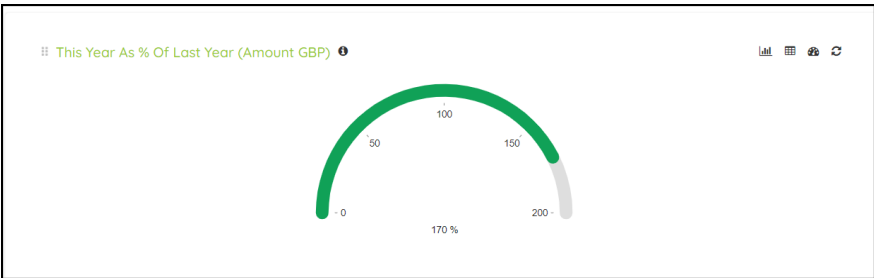
Series 1 Last Year - Date: 01/01/19..12/31/19

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

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

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]
42147258	BYT-KOMPLET s.r.o. CZ-687 01 Bjok...	0	0	0	0	13	1,603	0	0
43687129	Designstudio Gmunden AT-4810 G...	0	0	0	0	87	156,744	47,000	0
46897889	Englunds Kontorsmöbler AB SE-600 ...	0	0	0	0	5	1,213	214	0
47363218	Klubben NG-1344 Haslum	0	0	0	0	3	11,772	0	0
49525252	Beef House DE-40593 Düsseldorf	0	0	0	0	136	27,936	0	0
49633663	Autohaus Meiberg KG DE-22417 H...	0	0	0	0	181	102,852	25,450	0
49858585	Hotel Pfandersee DE-60320 Frankfurt...	0	0	0	0	63	14,396	2,400	0
50000	Guldford Water Department GUT 5...	2	533	0	0	0	0	0	0
60000	Blanemark HR 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	1	55	0	0	0	0	0	0
CW00020	Anders L. Krogh 8940 Radkersbro	2	119	0	0	0	0	0	0
CW00030	Kristen R. Osborn MN 56201 Wilmar	3	260	0	0	0	0	0	0
CW00040	Nadiah Balkeren 6137 RD Sittard	0	0	0	0	4	353	0	0
CW00041	Kim Bisseling 7206 Zutphen	0	0	0	0	1	59	0	0
TOTAL	Total List	11,746	524,776	0	0	7,627	894,299	109,620	0

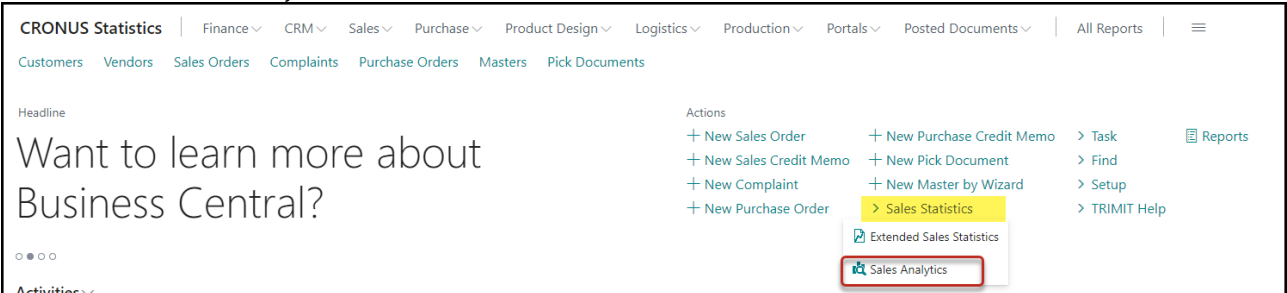
This might result in a Gauge (based on manipulated data of the previous picture):



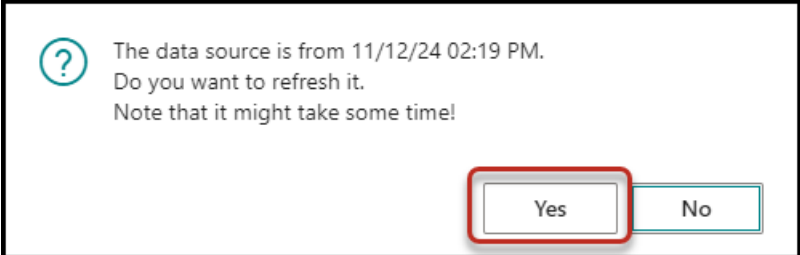
Sales Analytics

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

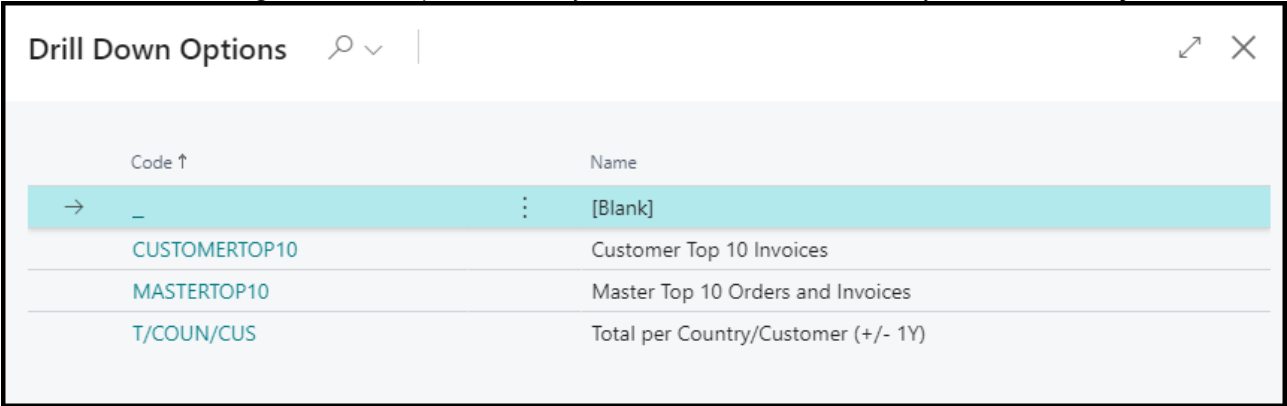
In the Role Center **TRIMIT Small Business** you can click **Sales Statistics**, **Sales Analytics**, or you can find it via **Search Sales Analytics**.



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 for 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**.



✓ Saved

Sales Analytics Request

Show Statistics

More options

Request Param.

Detailed By

Sell-to Customer No.

...

Data Source

Include Transactions

Incl. Sales Orders

Incl. Posted Sales Invoices

Incl. Posted Sales Credit Memos

Data Source DateTime

11/18/2024 4:34 PM

FastTab Request Param.

Detailed By

Actually, this is the highest level for your Statistics.

You can choose between the following 46 options:

Options

Description

→ Sell-to Customer No.

Bill-to Customer

Company Group

Chain

Salesperson

Salesperson 2

Salesperson 3

Territory

Country/Region

Sell-to Group

Sell-to Type

Options

Description

Customer Statistics Group

Sales Channel

Order Type

Collection

Period Code

1 Brand Code

Season Code

Location

Currency

Return Reason

Campaign No.

Item

Options

Description

Master

Group Master

Product Family

2 Design

Item Group

Gender

Item Statistics Group 4

Item Statistics Group 5

Item Category Code

Forecast Item

Tariff Position

Primary Vendor

Options

Description

Variant 1

Variant 2

Variant 3

Date

Week

Month

Quarter

Year

Document Type

Document No.

1. The names depend on the names of the **Global Dimensions 1 and 2** – in the TRIMIT Demo Data set to Brand and Season.

2. The names depend on the Caption Class Setup of the **Item Statistics Group 1 – 5**.

If you did choose an existing Setup with the **Sustainability Grp 1** filled, this will also be shown as an Option.

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

Start Date1/1/2023

End Date12/31/2023

Filter Sales Channel

Brand Filter

Customer Related

Filter Sell-to Customer No.

Filter Chain

Filter Salesperson

Filter Country/Region Code

Item Related

Filter Collection No.

Filter Item No.

Filter Master No.

Filter Primary Vendor

Filter Location 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.

Brand Filter is the Global Dimension 1 Filter – based on data in the Demo Data.

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 Date1/1/2024

End Date12/31/2024

Filter Sales Channel

Filter Collection No.

Brand Filter

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**.

Brand Filter is the Global Dimension 1 Filter – based on data in the Demo Data.

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.

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.

Sales Analytics Request

Show Statistics

Actions

Related

Fewer options

Request Param. >

Filter Period 1 >

Filter Period 2

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](#)

Sales Statistics Setup Line - 0

Page

General

Dates

Start Date1/1/2023

End Date12/31/2023

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

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

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

Sales Analytics Request

 Show Statistics

Actions ▾

Related ▾

Fewer options

Sales Analytics										
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)
10000	Adatum Corporation CB1 2FB Cambridge	0	0	0	0	1,071	49,864	0	24,425	0
2000	The Fashion Store UK CB1 2FB Cambridge	6,720	279,703	0	143,811	2,446	94,389	0	50,378	296
2010	The Shoe Store Europe DE-80807 Munchen	6,300	284,580	0	156,473	478	16,578	0	9,166	1,717
2020	Sportswear A/S DE-80807 Munchen	2,100	105,172	0	57,682	866	39,419	0	21,911	267
2030	The Surf Shop Ltd. SE1 OAX London	4,704	195,708	0	119,727	560	23,299	0	14,253	840
2040	Garment Company Ltd. US-FL 37125 Miami	8,064	353,520	0	179,404	462	20,410	0	10,387	1,732
3000	The Furniture Shop UK GU2 7YQ Guildford	13,860	574,355	0	332,698	3,217	165,818	0	112,543	346
30000	School of Fine Art US-FL 37125 Miami	0	0	0	0	8	3,363	0	2,624	0
40000	Alpine Ski House DE-80807 Munchen	0	0	0	0	3	370	0	288	0
→ TOTAL	Total List	41,748	1,793,038	0	989,795	9,111	413,510	0	245,975	434

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*

Options ▾

Description

→ Sell-to Customer No.

Bill-to Customer

Company Group

Chain

Salesperson

Salesperson 2

Salesperson 3

Territory

Country/Region

Sell-to Group

Sell-to Type

Options ▾

Description

Customer Statistics Group

Sales Channel

Order Type

Collection

Period Code

Brand Code

Season Code

Location

Currency

Return Reason

Campaign No.

Item

Options ▾

Description

Master

Group Master

Product Family

Design

Item Group

Gender

Item Statistics Group 4

Item Statistics Group 5

Item Category Code

Forecast Item

Tariff Position

Primary Vendor

Options ▾

Description

Variant 1

Variant 2

Variant 3

Date

Week

Month

Quarter

Year

Document Type

Document No.

Sales Analytics										
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)
2000	Olivia Trousers	1,680	67,320	0	26,539	210	8,415	0	3,317	800
2020	Isla Trousers	1,680	57,840	0	25,766	250	8,603	0	3,833	672
2100	Lily Blouse	0	0	0	0	405	14,576	0	5,746	0
2120	Sophia Shirt	0	0	0	0	279	9,762	0	5,859	0
2200	Grace Bomber	0	0	0	0	230	8,278	0	4,622	0
2210	Poppy Blazer	1,680	89,023	0	52,080	240	12,628	0	7,350	705
2330	Uma Skirt	1,680	65,520	0	39,426	822	32,058	0	19,611	204
2410	Katie Scarf	0	0	0	0	10	70	0	40	0
→ TOTAL	Total List	6,720	279,703	0	143,811	2,446	94,390	0	50,378	296

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*

The image displays four sequential screenshots of the SAP 'Options' menu, illustrating the steps to create a new customer. Each screenshot shows a list of options with a red arrow pointing to the selected item.

- Screenshot 1:** The 'Options' menu is open. The 'Sell-to Customer No.' option is highlighted with a red arrow.
- Screenshot 2:** The 'Options' menu is open. The 'Master' option is highlighted with a red arrow.
- Screenshot 3:** The 'Options' menu is open. The 'Variant 1' option is highlighted with a red arrow.
- Screenshot 4:** The 'Options' menu is open. The 'Variant 1' option is highlighted with a red arrow.

Sales Analytics

[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	Net Amount LCY index (2-1)
20	Royal Blue	0	0	0	0	12	432	0	170
21	Light Blue	0	0	0	0	6	216	0	83
30	Yellow	0	0	0	0	200	7,198	0	2,750
35	Orange	0	0	0	0	14	504	0	198
70	Red	0	0	0	0	12	432	0	177
73	Pink	0	0	0	0	45	1,620	0	686
99	Black	0	0	0	0	116	4,175	0	1,681
→ TOTAL	Total List	0	0	0	0	405	14,577	0	5,745

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: 01/01/23..12/31/23

Series 2:

Date: 01/01/24..12/31/24

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](#)

Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Serie 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	0	0	0	0	12	432	0	170	0
21	Light Blue	0	0	0	0	6	216	0	83	0
30	Yellow	0	0	0	0	200	7.198	0	2.750	0
35	Orange	0	0	0	0	14	504	0	198	0
70	Red	0	0	0	0	12	432	0	177	0
73	Pink	0	0	0	0	45	1.620	0	686	0
99	Black	0	0	0	0	116	4.175	0	1.681	0
TOTAL	Total List	0	0	0	0	405	14.577	0	5.745	0

It is also possible to click on any **Total** Amount/Quantity in the Statistics.

Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Serie 2	Net Amount LCY Series 2	Discount Amount LCY Series 2	Cost Amount LCY Series 2	Net Amount LCY Index (2-1)
10000	Adatum Corporation CB1 2FB Cambridge	0	0	0	0	1,071	49,864	0	24,425	0
2000	The Fashion Store UK CB1 2FB Cambridge	6,720	279,703	0	143,811	2,446	94,389	0	50,378	296
2010	The Shoe Store Europe DE-80807 Munchen	6,300	284,580	0	156,473	478	16,578	0	9,166	1,717
2020	Sportswear A/S DE-80807 Munchen	2,100	105,172	0	57,682	866	39,419	0	21,911	267
2030	The Surf Shop Ltd. SE1 OAX London	4,704	195,708	0	119,727	560	23,299	0	14,253	840
2040	Garment Company Ltd. US-FL 37125 Miami	8,064	353,520	0	179,404	462	20,410	0	10,387	1,732
3000	The Furniture Shop UK GU2 7YQ Guildford	13,860	574,355	0	332,698	3,217	165,818	0	112,543	346
30000	School of Fine Art US-FL 37125 Miami	0	0	0	0	8	3,363	0	2,624	0
40000	Alpine Ski House DE-80807 Munchen	0	0	0	0	3	370	0	288	0
→ TOTAL	Total List	41,748	1,793,038	0	989,795	9,111	413,510	0	245,975	434

In that case, you can choose any option:

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

And the created Statistics, will simply show all Amounts/Quantities of this chosen Option.

Code	Description	Quantity	Net Amount LCY	Discount Amount LCY	Cost Amount LCY	Quantity Serie 2	Net Amount LCY Series 2	Discount Amount LCY Series 2	Cost Amount LCY Series 2	Net Amount LCY Index (2-1)
SALESPERSON [BLANK]	Salesperson [blank]	0	0	0	0	40	16,096	0	12,554	0
JO		8,400	389,752	0	214,154	2,386	93,499	0	45,859	417
JR	John Roberts	28,644	1,207,578	0	655,913	6,125	280,617	0	173,308	430
TR	Theodor Rudolphs	4,704	195,708	0	119,727	560	23,299	0	14,253	840
→ TOTAL	Total List	41,748	1,793,038	0	989,794	9,111	413,511	0	245,974	434

Data Warehouse Statistics

There is an extra Page **trm Statistics Data Warehouse (6036864, List)** with all the Statistics Data created for the 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																			
Transaction Type ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Sell-to Customer No.	Item No.	Master No.	Net Amount	Cost Amount	Discount Amount	Net Amount LCY	Cost Amount LCY	Discount Amount LCY	Intercom...	Order Type	Quantity	Bill-to	Comp... Group	Chain	
Sales Invoice	Invoice	103001	11508	2000	20002036	2000	370	138.8311	0	370	138.8311	0	☐		10	2000			
Sales Invoice	Invoice	103001	11627	2000	20002038	2000	370	143.801	0	370	143.801	0	☐		10	2000			
Sales Invoice	Invoice	103001	11746	2000	20002040	2000	390	152.051	0	390	152.051	0	☐		10	2000			
Sales Invoice	Invoice	103001	11865	2000	20002042	2000	390	157.0408	0	390	157.0408	0	☐		10	2000			
Sales Invoice	Invoice	103001	11984	2000	20002044	2000	410	165.2908	0	410	165.2908	0	☐		10	2000			
Sales Invoice	Invoice	103001	12103	2000	20002046	2000	410	170.2607	0	410	170.2607	0	☐		10	2000			
Sales Invoice	Invoice	103001	12222	2000	20002048	2000	430	178.5107	0	430	178.5107	0	☐		10	2000			
Sales Invoice	Invoice	103001	15675	2000	20003536	2000	380	138.8311	0	380	138.8311	0	☐		10	2000			
Sales Invoice	Invoice	103001	15794	2000	20003538	2000	380	143.801	0	380	143.801	0	☐		10	2000			
Sales Invoice	Invoice	103001	15913	2000	20003540	2000	400	152.051	0	400	152.051	0	☐		10	2000			
Sales Invoice	Invoice	103001	16032	2000	20003542	2000	400	157.0408	0	400	157.0408	0	☐		10	2000			
Sales Invoice	Invoice	103001	16151	2000	20003544	2000	420	165.2908	0	420	165.2908	0	☐		10	2000			

Statistics Data Warehouse														
Transaction Type ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Sell-to Group	Sell-to Type	Salesperson	Salesperson 2	Salesperson 3	Design	Item Group	Gender	Item Statistics Group 4	Item Statistics Group 5	Customer Statistics Group
Sales Invoice	Invoice	103001	11508			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	11627			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	11746			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	11865			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	11984			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	12103			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	12222			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	15675			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	15794			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	15913			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	16032			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	16151			JR			1	210	110	0	10	0
Sales Invoice	Invoice	103001	16270			JR			1	210	110	0	10	0

Statistics Data Warehouse									
Transaction Type ↑	Document Type ↑	Document No. ↑	Document Line No. ↑	Collection No.	Sales Channel	Campaign No.	Country/Regi... Code	Complaint	Order Date
Sales Invoice	Invoice	103001	11508				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	11627				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	11746				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	11865				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	11984				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	12103				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	12222				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	15675				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	15794				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	15913				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	16032				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	16151				GB	☐	11/5/2024
Sales Invoice	Invoice	103001	16270				GB	☐	11/5/2024