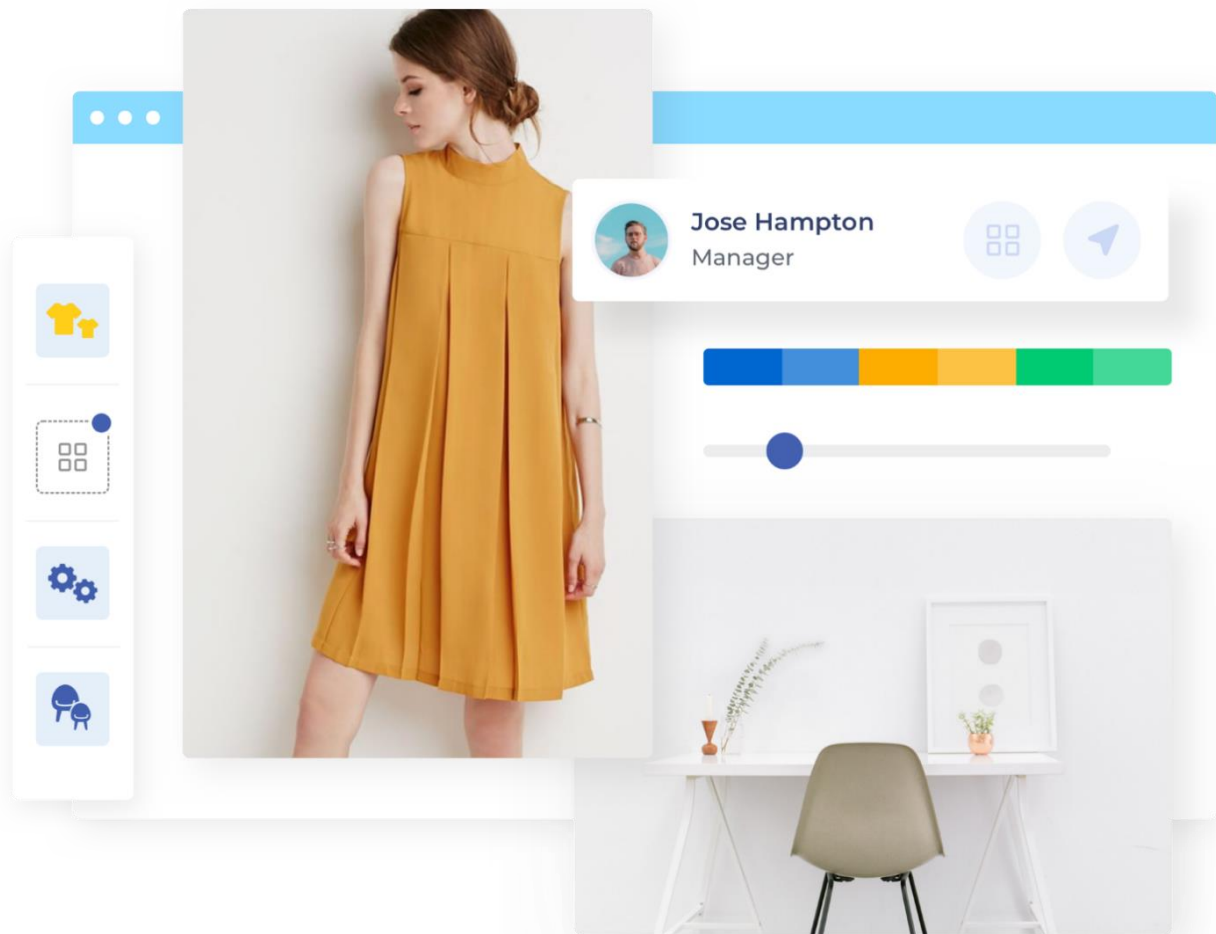


**WHITE PAPER**

TRIMIT EXTENDED SALES STATISTICS BC16

This document contains information about the Extended Sales Statistics functionality in TRIMIT for Business Central W1 BC16.

Version: BC16.1.1.0 - 1

Date: 27-05-2020

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INTRODUCTION

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

TRIMIT Extended Sales Statistics can provide you the information regarding goods sold and goods to be delivered based on the open and/or posted Sales Orders.

It can be run in an infinite number of ways and is the replacement for the **TRIMIT Sales Statistics** in previous releases (Customer/Item Statistics and Item/Customer Statistics). As an essential difference the **TRIMIT Extended Sales Statistics** handles any setup in the same report or page, regardless of whether you want Item or Customer related subjects to be leading for the statistics output.

For frequently used combinations of the TRIMIT Extended Sales Statistics, you can also 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 statistics for a specific record of that type when you are standing on it, i.e. a Sales Order, a Customer, a Salesperson, etc.

The functionality described is the functionality in **TRIMIT for Business Central W1 BC16**.

The pictures in this White Paper are based on the demo database for **TRIMIT Business Central W1 BC16**, which is based on Microsoft Dynamics 365 Business Central 2020 release wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT Extended Sales Statistics contains the following objects:

The tables

6036397 trm Call Generate Statistics
6036398 trm Call Generate Statistics Meta
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 Statistics Setup Header
6036859 trm Sales Statistics Setup Line
6038136 trm Portal Sales Statistics Temp

The pages

6036856 trm Sales Statistics Page
6036857 trm Sales Statistics Setup List
6036858 trm Sales Statistics Setup Header
6036859 trm Sales Statistics Setup Subpage
6036863 trm Sales Statistics Setup Line
6036865 trm Statistics Overview

The pages	<i>6036866 trm Statistics Overview Subpage</i> <i>6036867 trm Statistics Overview List</i>
The reports	<i>6036850 trm Sales Statistics Report</i>
The codeunits	<i>6036852 trm Statistics Data Query</i> <i>6036853 trm Statistics Output Handler</i>
The queries	<i>6036850 trm Statistics Sales Invoices</i> <i>6036851 trm Statistics Sales Credit Memos</i> <i>6036852 trm Statistics Sales Orders</i> <i>6036853 trm Statistics Sales Orders ASI</i> <i>6036854 trm Statistics Budget Entries</i> <i>6036855 trm Statistics Output Query</i> <i>6036856 trm Statistics Output Query Date</i>

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

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 TRIMIT Extended Sales 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 **Statistics Data Query** (Codeunit 6036852) to store data in **Statistics Data** (Table 6036854).

Because of performance, which is particularly important for statistics generated on the portals, it is recommended to use this possibility where 100% updated data are not crucial.

However, some statistics will always require Real-time data, i.e. a statistic on a Sales Order.

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

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

EXTENDED SALES STATISTICS SETUPS LIST | WORK DATE: 23-1-2020

Search

+ New

Manage

Process

Report

Open in Excel

Actions

Fewer options

Refresh Statistics Data

Status

Output


 JOB QUEUE ENTRY CARD





Codeunit · 6036852 · Statistics Data Query

Process Report Show Attached | Actions Navigate Less options

General

Show less

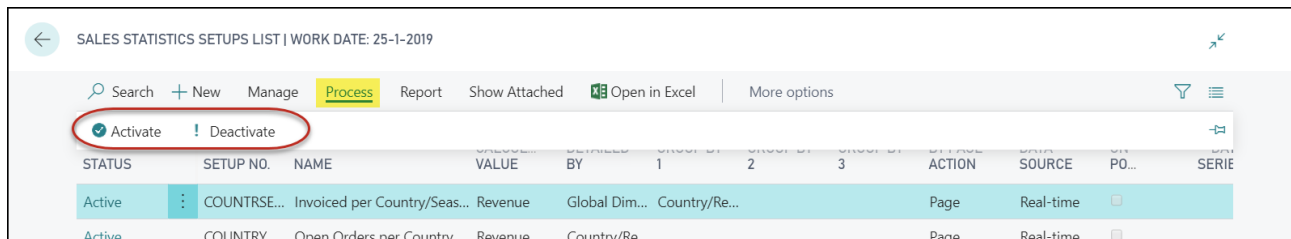
Object Type to Run	Codeunit	User ID	CORNATOR\KBI
Object ID to Run	6036852	Maximum No. of Attempts	3
Object Caption to Run	Statistics Data Query	Last Ready State	12/17/2018 3:55 PM
Description	Statistics Data Query	Earliest Start Date/Time	12/17/2018 3:55 PM
Parameter String		Expiration Date/Time	
Job Queue Category	STATISTICS	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 **Sales Statistics Setups** with all the necessary settings and filters, saved them as Setup Nos. and from then just enter the required Setup No. when you want one of the predefined Sales Statistics Setups.

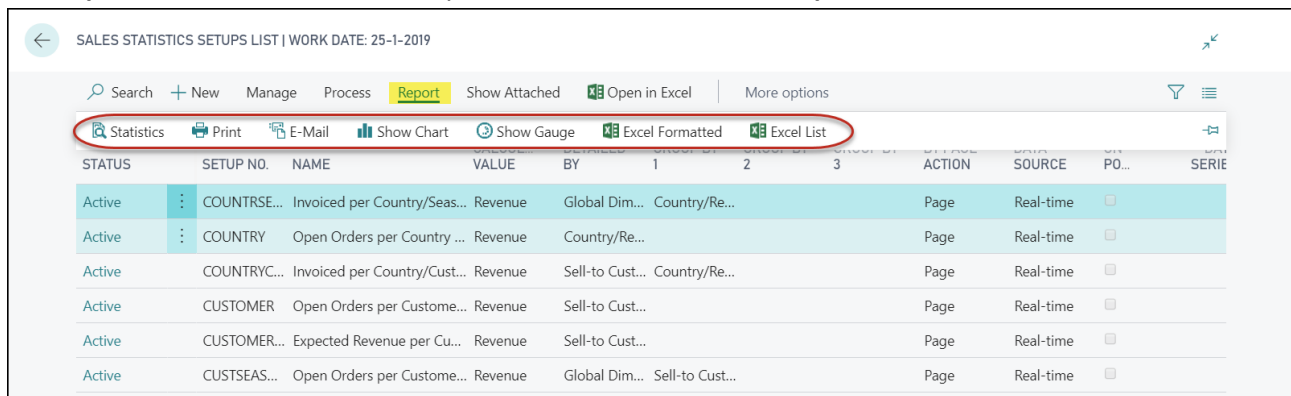
A **Setup No.** can be activated/deactivated directly from the **Sales Statistics Setup List** or in the individual Cards.



STATUS	SETUP NO.	NAME	VALUE	BY	1	2	3	ACTION	SOURCE	PO...	SERIE
Active	COUNTRSE...	Invoiced per Country/Seas...	Revenue	Global Dim...	Country/Re...			Page	Real-time		
Active	COUNTRY	Open Orders per Country	Revenue	Country/Re...				Page	Real-time		

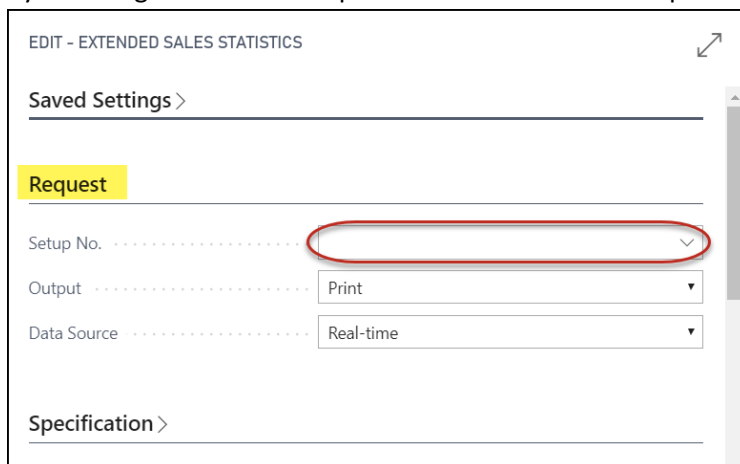
See [Status](#) for the details.

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



STATUS	SETUP NO.	NAME	VALUE	BY	1	2	3	ACTION	SOURCE	PO...	SERIE
Active	COUNTRSE...	Invoiced per Country/Seas...	Revenue	Global Dim...	Country/Re...			Page	Real-time		
Active	COUNTRY	Open Orders per Country ...	Revenue	Country/Re...				Page	Real-time		
Active	COUNTRYC...	Invoiced per Country/Cust...	Revenue	Sell-to Cust...	Country/Re...			Page	Real-time		
Active	CUSTOMER	Open Orders per Custome...	Revenue	Sell-to Cust...				Page	Real-time		
Active	CUSTOMER...	Expected Revenue per Cu...	Revenue	Sell-to Cust...				Page	Real-time		
Active	CUSTSEAS...	Open Orders per Custome...	Revenue	Global Dim...	Sell-to Cust...			Page	Real-time		

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.



EDIT - EXTENDED SALES STATISTICS

Saved Settings >

Request

Setup No. COUNTRSE...

Output Print

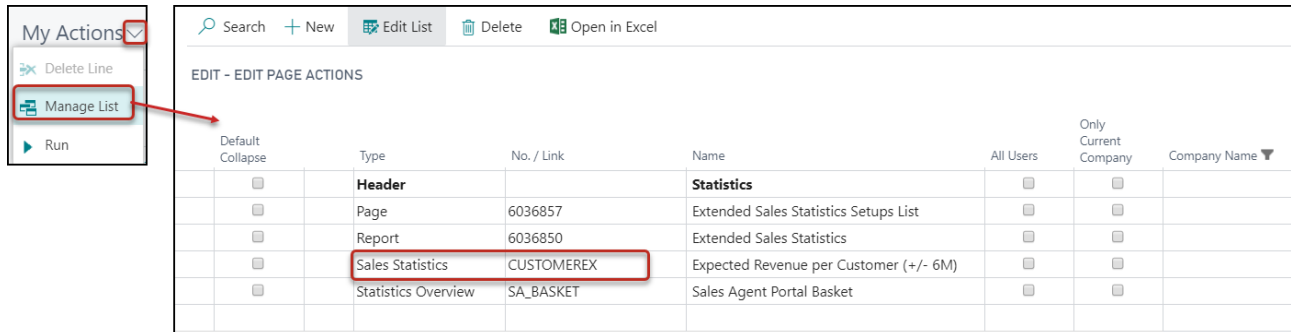
Data Source Real-time

Specification >

Learn more about 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 use of these FactBoxes in the **White Paper – TRIMIT RTC Features**.

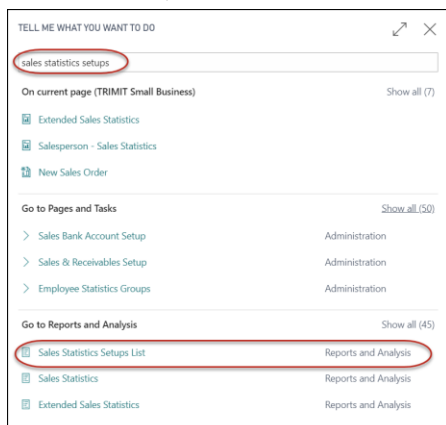
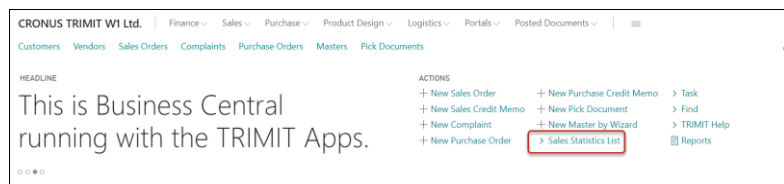


Default Collapse	Type	No. / Link	Name	All Users	Only Current Company	Company Name
☐	Header		Statistics	☐	☐	
☐	Page	6036857	Extended Sales Statistics Setups List	☐	☐	
☐	Report	6036850	Extended Sales Statistics	☐	☐	
☐	Sales Statistics	CUSTOMEREX	Expected Revenue per Customer (+/- 6M)	☐	☐	
☐	Statistics Overview	SA_BASKET	Sales Agent Portal Basket	☐	☐	

EXTENDED SALES STATISTICS SETUP NOS.

You can maintain the **Extended Sales Statistics Setup Nos.** via **Tell me sales statistics setups** or – when using the **TRIMIT Small Business** Role Center by clicking **Sales Statistics List**.

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

EXTENDED SALES STATISTICS SETUPS LIST WORK DATE: 23-1-2020													
Status	Setup No. ↑	Name	Calculated Value	Detailed By	Group By 1	Gro... By 2	Gro... By 3	Default by Page Action	Data Source	Allow on Port...	Data Series	Filters	Con... Filters
Active	BASKET01	Sales Orders per Size (Variant 2)	Revenue	Variant 2				Page	Real-time	☒	1	☐	☐
Active	BASKET02	Sales Orders per Item Group	Revenue	Master	Item Statistics Grou...			Page	Real-time	☒	1	☐	☐
Active	BASKET03	Budget Follow-Up	Revenue	Sell-to Customer No.				Page	Real-time	☒	2	☐	☐
Active	COUNTRSEAS	Invoiced per Country/Season (+/- 1Y)	Revenue	Global Dimension 2	Country/Region			Page	Real-time	☐	1	☐	☐
Active	COUNTRY	Open Orders per Country (+/- 1Y)	Revenue	Country/Region				Page	Real-time	☐	1	☐	☐
Active	COUNTRYCUS	Invoiced per Country/Customer (+/- 1Y)	Revenue	Sell-to Customer No.	Country/Region			Page	Real-time	☐	1	☐	☐
Active	COUNTRY-SPLIT	Invoiced per Country	Revenue	Country/Region				Page	Statistic Data	☒	1	☐	☐

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

Sales Statistics Setup Header

Process
Report
Actions
Fewer options

General

Setup No.
TEST_1

Name
Posted in 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

FASTTAB GENERAL

SETUP NO.

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

NAME

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

STATUS

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

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

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

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

Process
Report
Actions
Fewer options

Activate

Deactivate

CALCULATED VALUE

This field determines which amounts/quantities will be calculated in your statistics.

Of course, in combination with the chosen **Include Transactions**.

You can choose between the following three options:

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

^{*)} **Start-/End Date** are not shown by default in the **Data Series** lines, but you can add them yourself with **Choose Columns**.

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

DETAILED BY

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

You can choose between the following 45 options:

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

GROUP BY 1, 2 & 3

In these three **Group By** fields, you can set up the topics for which you want a subtotal. The option list contains the same topics by lookup from **Detailed By**, **Group By 1**, **Group By 2** and **Group By 3**.

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 FastTab **Specification** above:

CODE	DESCRIPTION	QUANTITY	AMOUNT GBP	DISCOUNT GBP	BUDGET AMOUNT
70000	Side Panel	1	796	0	0
DK	Denmark	518	44,768	0	0
2020	Sportswear A/S DK-8800 Viborg	516	44,648	0	0
2135	Polo Shirt Sizes and Assortments	21	431	0	0
21350102	Polo Shirt Sizes and Assortments White,S	1	11	0	0
21350103	Polo Shirt Sizes and Assortments White,M	2	23	0	0
21350104	Polo Shirt Sizes and Assortments White,L	3	34	0	0
21350105	Polo Shirt Sizes and Assortments White,XL	2	23	0	0
21350106	Polo Shirt Sizes and Assortments White,XXL	1	11	0	0
21359202	Polo Shirt Sizes and Assortments Charcoal,S	1	11	0	0
21359203	Polo Shirt Sizes and Assortments Charcoal,M	2	23	0	0
21359204	Polo Shirt Sizes and Assortments Charcoal,L	2	23	0	0
21359205	Polo Shirt Sizes and Assortments Charcoal,XL	2	23	0	0
21359206	Polo Shirt Sizes and Assortments Charcoal,XXL	1	11	0	0
213599AA	Polo Shirt Sizes and Assortments Black,S-XL 1221	1	57	0	0
213599BB	Polo Shirt Sizes and Assortments Black,S-XXL 12211	1	68	0	0
213599CC	Polo Shirt Sizes and Assortments Black,M-XXL 1221	2	113	0	0
2700	Men's Brogue	495	44,217	0	0
270010021G050	Men's Brogue Black,Printed,Leather,Normal Width,5	4	333	0	0
270010021G055	Men's Brogue Black,Printed,Leather,Normal Width,5½	4	333	0	0
270010021G060	Men's Brogue Black,Printed,Leather,Normal Width,6	8	666	0	0
270010021G065	Men's Brogue Black,Printed,Leather,Normal Width,6½	8	666	0	0
270010021G070	Men's Brogue Black,Printed,Leather,Normal Width,7	12	1,000	0	0
270010021G075	Men's Brogue Black,Printed,Leather,Normal Width,7½	12	1,000	0	0
270010021G080	Men's Brogue Black,Printed,Leather,Normal Width,8	16	1,436	0	0

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

TOP DOWN VALUE

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

The sorting will first be performed for **Group By 3**, then **Group By 2**, **Group By 1** and finally for **Detailed By**.

With the setup shown above the statistics would be sorted in *Country/Region* order, within each Country/Region in *Sell-to Customer No.* order, within each Sell-to Customer No. in *Master No.* order and finally in *Item No.* order within each Master No.

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

Quantity
Amount LCY
Cost LCY
Discount LCY
Amount
Cost
Discount
Budget Quantity
Budget Amount
Budget Cost
GM
Budget GM
Net Weight
Gross Weight
Volume

TOP DOWN NUMBER

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

Be aware that **Top Down Number** are always the top value records in the context they are in.

I.e. if you have **Detailed By Item** with **Group By 1 Sell-to-Customer** you will not see the top xx Items – but the top xx Sell-To-Customers per Item. Therefore, having a top list makes most sense with only one level.

If **Top Down Value** is set and no **Top Down Number** it will just sort top down, and this will go on each level – meaning **Group By 3** sorted top 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**, basically the totals will only include the limited number of lines. If you still want to see the totals unaffected by the limitation, you can set a check mark here.

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

DEFAULT BY PAGE ACTION

When you generate context driven statistics, you cannot select the output format from time to time, so you need to predefine it here. You have 7 options corresponding to the 7 available actions by running the statistics from the **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 all the possible topics that can be chosen for the Column 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 Column 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 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 the TRIMIT Portals. In that case, it will open a webpage and show the outcome as a Gauge, based on the settings in FastTab Gauge .

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

ALLOW ON PORTALS

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

SHOW PICTURE

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

EXPLODE ASSORTMENT

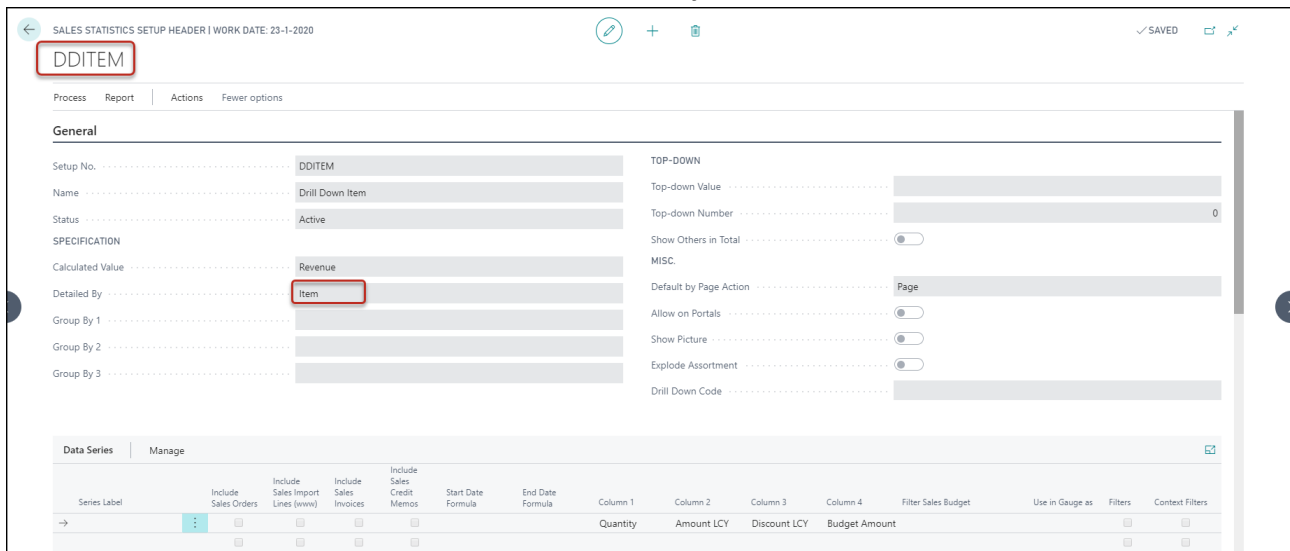
A check mark in this field will show the quantities detailed on pieces in the assortment instead of the quantity of the assortment itself.

DRILL DOWN CODE

You can enter a **Setup No.** into 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 will only have to fill **Setup No.** and **Detailed By** and click *Process, Activate*. When the drill down is performed, the setup of the specification will be according to the setup of the statistics line you are coming from, and the drill down data will be shown according to the setup in the **Detailed By** field of the **Drill Down Code**.

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



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

DDITEM

Process Report Actions Fewer options

General

Setup No. DDITEM

Name Drill Down Item

Status Active

SPECIFICATION

Calculated Value Revenue

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

Data Series Manage

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

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

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

TEST_2

Process **Report** Actions Fewer options

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

Setup No. TEST_2 TOP-DOWN

Name Order Book per Customer Top-down Value

Status Active Top-down Number 0

SPECIFICATION

Calculated Value Order Book Show Others in Total

Detailed By Sell-to Customer No. MISC.

Group By 1

Group By 2

Group By 3

Default by Page Action Page

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code DITEM

Data Series Manage

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

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

SALES STATISTICS | WORK DATE: 23-1-2020

REQUEST PARAM.

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

Data Source Real-time Series 1 Current Day

Data Source DateTime 25-5-2020 11:07

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

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

Related Picture

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

SALES STATISTICS | WORK DATE: 23-1-2020

REQUEST PARAM.

Request No. TEST_2 Global Filters Date: 23-01-20, Intercompany: No, Sell-to Customer No.: 2000

Data Source Real-time Series 1 Current Day

Data Source DateTime 25-5-2020 11:08

Print E-Mail Excel Formatted More options

Code	Description	Quantity	Amount GBP	Discount GBP	Budget Amount
21009901	Lily Blouse BlackXS	10	360	0	0
21009902	Lily Blouse BlackS	12	432	0	0
21009903	Lily Blouse BlackM	22	792	0	0
21009904	Lily Blouse BlackL	22	792	0	0
21009905	Lily Blouse BlackXL	21	756	0	0
21009906	Lily Blouse BlackXXL	20	720	0	0
21009907	Lily Blouse Black3XL	10	360	0	0
22102704	Poppy Blazer Steelblue.4	2	100	0	0
22102706	Poppy Blazer Steelblue.6	4	200	0	0
22102708	Poppy Blazer Steelblue.8	8	400	0	0
22102710	Poppy Blazer Steelblue.10	8	400	0	0
22102712	Poppy Blazer Steelblue.12	4	200	0	0
22102714	Poppy Blazer Steelblue.14	2	100	0	0
22102716	Poppy Blazer Steelblue.16	2	100	0	0
24106501	Katie Scarf Lawn Green.150 x 25 cm	5	35	0	0
24109901	Katie Scarf Black.150 x 25 cm	5	35	0	0
TOTAL	Total List	469	17,013	0	0

FASTTAB DATA SERIES

Data Series Manage													
New Line Delete Line Setup/Filters													
Series Label	Sales Orders	Lines (www)	Invoices	Memos	Formula	Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge as	Context Filters
→ Last Year	☒	☐	☒	☐	-CY-1Y	-CY-1D	Quantity	Amount LCY	Discount LCY	Budget Amount			☐
→ This Year	☒	☐	☒	☐	-CY	CY	Quantity	Amount LCY	Discount LCY	Budget Amount			☐

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

You can enter the values along the line if you only need the fields included here but to get a better overview for some of the Fields and to set Filters as well, you can click **Manage**, **Setup/Filters** after you have created a new line by entering a **SERIES LABEL**.

SERIES LABEL

Here you can enter a Series Label 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 4 columns, the second Data Series line for the next 4 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 used.

INCLUDE SALES ORDERS

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

INCLUDE SALES IMPORT LINES (WWW)

If you want Sales Import Lines from the portals (ASI) included in your statistics, set a check mark here. You can see these lines in the **Portal Sales Documents** and **Portal Sales Documents (Error)**.

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.

START DATE

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

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.

<https://docs.microsoft.com/en-us/dynamics365/business-central/ui-enter-date-ranges>

COLUMN 1, 2, 3 AND 4

For each Data Series you have 4 columns defining which information you want to see.

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

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

Column 1

Column 2

Column 3

Column 4

GM stands for *Gross Margin*.

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

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

NOTE

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

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

FILTER SALES BUDGET

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

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

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

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 this 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**. See

FILTERS

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

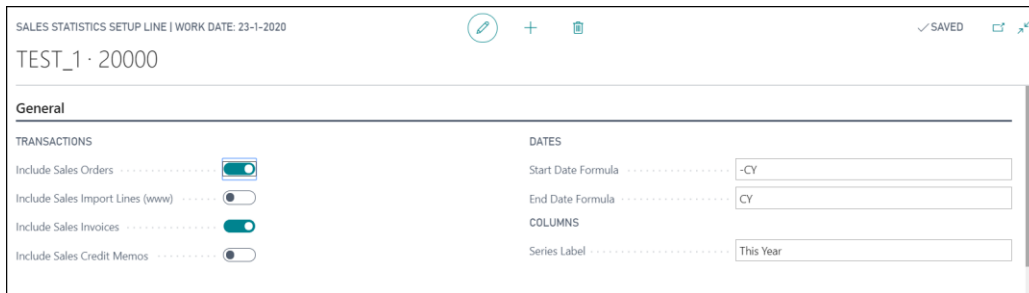
CONTEXT FILTERS

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

DATA SERIES, FASTTAB GENERAL

You can open this page via *Manage, Setup/Filters*.

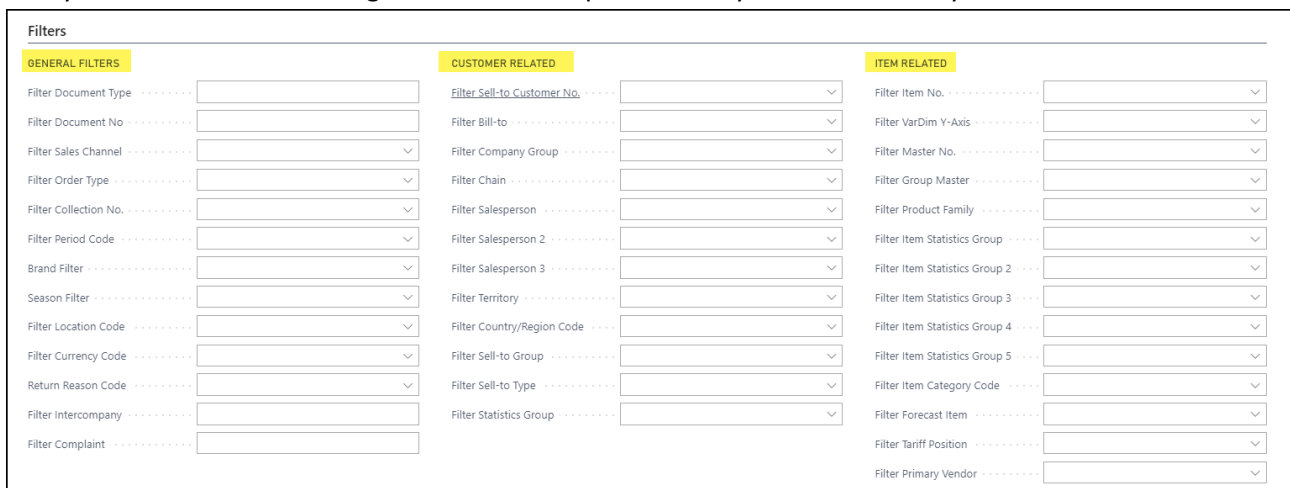
Here you have the fields from the Data Series line presented in a different view.



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

DATA SERIES, FASTTAB FILTERS

By each Data Series line, you have 35 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 at all are inherited from the first Data Series line.

FASTTAB CHARTS

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

Charts			
Chart Type	Column	Label ToolTip	No. & Name
Chart Value	Amount LCY	DASHBOARD	
Stack	☐	Label Axis in Dashboard	No. & Name
Label Axis	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 Type *Pie* and *Donut* can only show one Data Series line, whereas the others can show two.

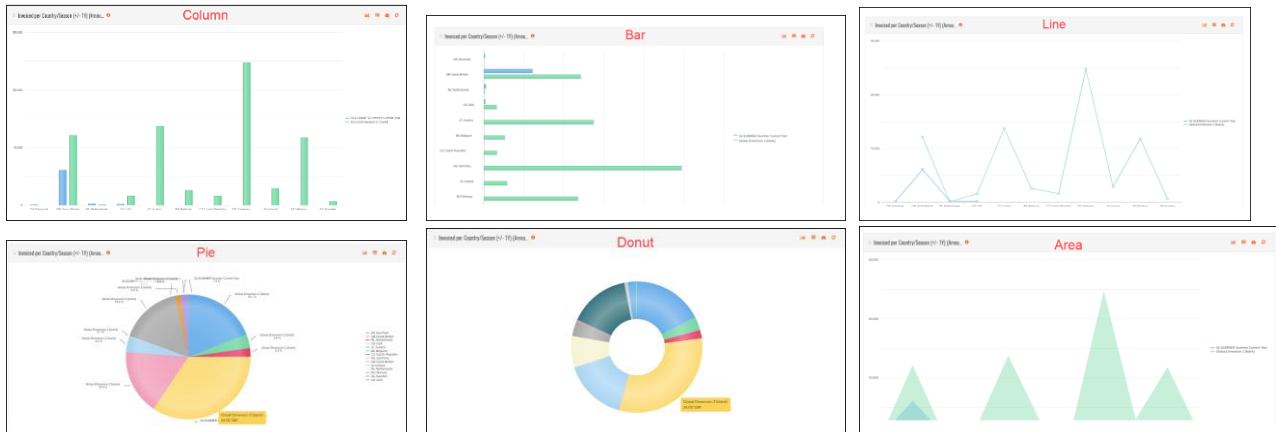


CHART VALUE

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:

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

STACK

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

LABEL AXIS

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

You can choose either *No.*, *Name* or both *No. & Name* so if your chart is detailed by Customers, you can show either Customer No., Customer Name or both Customer No. & Name.

LABEL AXIS IN DASHBOARD

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

LABEL TOOLTIP

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

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

TOP DOWN NUMBER IN DASHBOARD

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

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 *Percentage*.

MIN VALUE

Here you can enter a value for the Minimum of the values shown in the Gauge.

MAX VALUE

Here you can enter a value for the Maximum of the values shown in the Gauge.

THRESHOLD 1

Here you can enter a value as first Threshold in your Gauge.

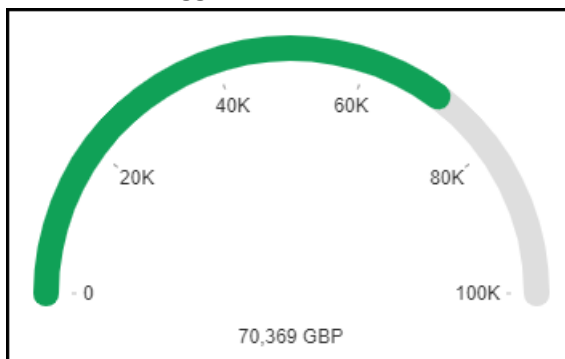
THRESHOLD 2

Here you can enter a value as second Threshold in your Gauge.

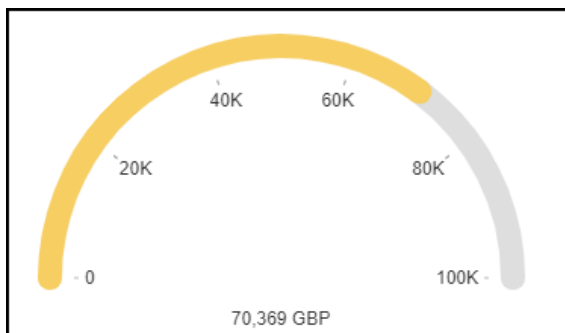
RANGE STYLE

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

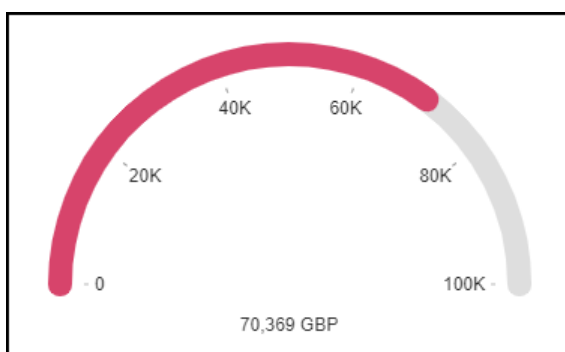
Unfavorable -> Favorable will show the Gauge from **Min Value** to **Max Value** where the total value will show in **Red** if it is smaller than **Threshold 1**, in **Orange** if it is between **Threshold 1** and **Threshold 2** and in **Green** if it is bigger than **Threshold 2**.



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 nos. are referring to the **VarDim Type Placement in Item No.** of the VarDim Master of the Masters.

Type	VarDim Type	Description	Search Method	VarDim Type Placement in Item No.	Consist... Inherit...	Dimension 2
Variant	SHOE_COLOR	Shoe Color	O/S (Overlying Le	Variant 1	☐	No
Variant	SHOE_SURF	Shoe Surface	O/S (Overlying ...	Variant 2	☐	No
Variant	SHOE_SOLE	Shoe Sole Type	O/S (Overlying ...	Variant 3	☐	No
Variant	SHOE_WIDTH	Shoe Width	O/S (Overlying ...	Variant 4	☐	No
Variant	SHOE_US	US Shoe Sizes 5 - 13	O/S (Overlying ...	Variant 5	☐	No

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

Variant 1 VarDim Type Filter

Variant 2 VarDim Type Filter

Variant 3 VarDim Type Filter

Search in VarDim Order

☐

If you for instance want to group by *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 Filters**. 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 unchecked.

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

FASTTAB ADVANCED

Advanced

Data Source Real-time
Cache

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.

FASTTAB PRINT

Print

Print as Matrix ☐

PRINT AS MATRIX

Here you have the possibility to decide whether the first column of the first Data Series line should be shown in lines or in a matrix. This will only have effect if **Detailed By** is set to *Item* and you will only see the first Data Series line.

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

FASTTAB EXCEL

The fields in this **FastTab** are only applicable when using the Windows Client, not when using the Web Client.

If you want the statistics in Excel format to be saved or to update an already existing workbook, you can specify the file path and name here.

Excel

Update Workbook File Name
Save Workbook File Name

Update Worksheet Name

UPDATE WORKBOOK FILE NAME

Here you specify the file path and name of an existing Excel workbook that you want to update with the next statistics calculation. You will also have to fill the **Update Worksheet Name** field.

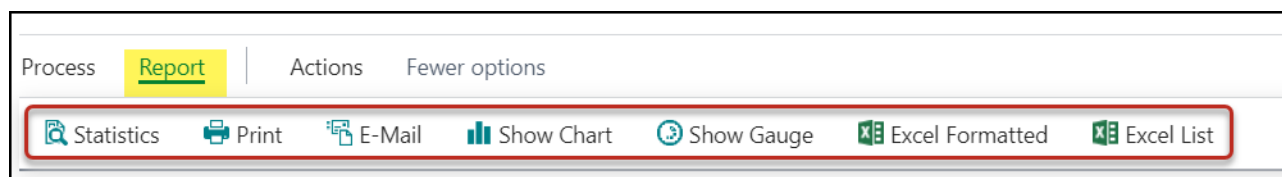
UPDATE WORKSHEET NAME

Here you specify the Worksheet Name that you want to update in the existing Excel workbook specified in the **Update Workbook Name** field.

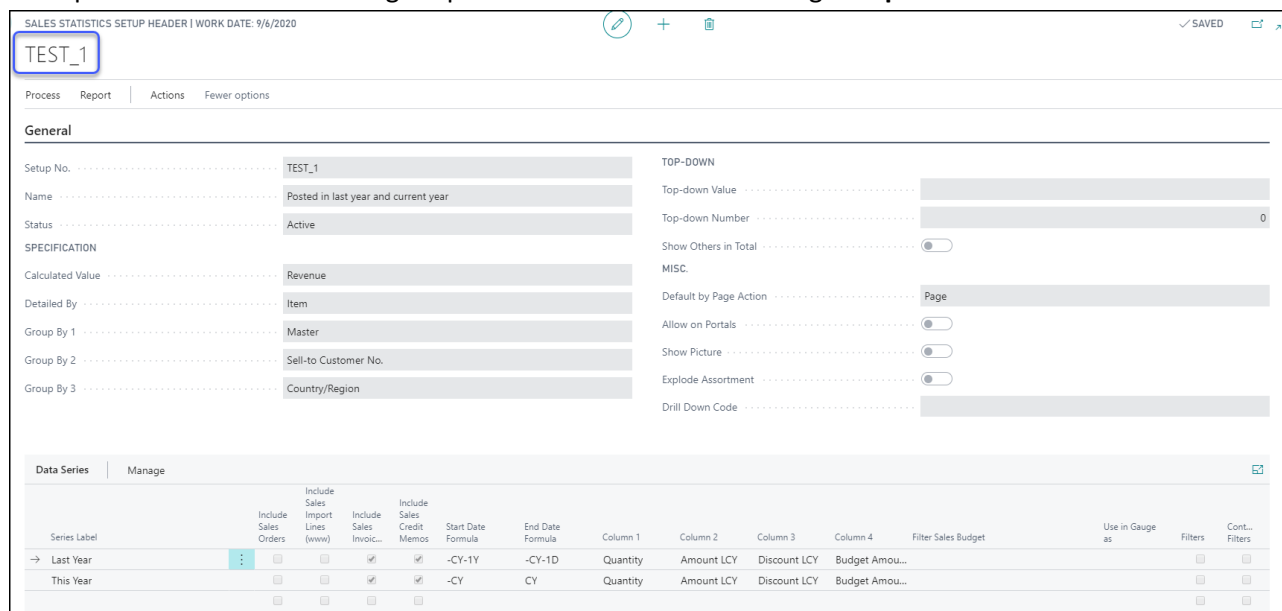
SAVE WORKBOOK FILE NAME

This field is used if you want to update an existing Excel workbook and save it under a different workbook file name. When you have specified the **Update Workbook File Name** and **Update Worksheet Name** of the workbook to update, you can specify here which file path and name to use for saving the updated result.

REPORT ACTIONS



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



Series Label	Include Sales Orders	Include Sales Import Lines (www)	Include Sales Invoic...	Include Sales Credit Memos	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sales Budget	Use in Gauge as	Filters	Cont... Filters
→ Last Year	☐	☐	☒	☒	-CY-1Y	-CY-1D	Quantity	Amount LCY	Discount LCY	Budget Amou...			☐	☐
This Year	☐	☐	☒	☒	-CY	CY	Quantity	Amount LCY	Discount LCY	Budget Amou...			☐	☐

STATISTICS

The page action **Statistics** will calculate the statistics according to all the setup fields and show the result on the screen. Only the totals of the highest used **Group By** level will be shown initially in the Windows Client where **Group By 3** is the highest level if you are using all **Group By** fields.

In the Web Client, all lines will be expanded already.

SALES STATISTICS | WORK DATE: 9/6/2020

REQUEST PARAM.
Request No. TEST_1
Data Source Real-time
Data Source DateTime 5/25/2020 11:56 AM

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

Print E-Mail Show Chart Show Gauge Excel Formatted Actions Fewer options

Code	Description	Quantity [1]	Amount GBP [1]	Discount GBP [1]	Budget Amount [1]	Quantity [2]	Amount GBP [2]	Discount GBP [2]	Budget Amount [2]	Related Picture
Toggle Expand / Collapse All	RUCK Storage Unit/W.D...	0	0	0	0	62	13,600	2,400	0	
1964-W	INNSBRUCK Storage Unit/W.D...	0	0	0	0	1	796	0	0	
DK	Denmark	2	118	0	0	0	0	0	0	
CW00020	Anders L. Krogh 8840 Redkæ...	2	118	0	0	0	0	0	0	
2000	Olivia Trousers	1	58	0	0	0	0	0	0	
20002042	Olivia Trousers Royal Blue.42	1	58	0	0	0	0	0	0	
2010	Amelia Trousers	1	60	0	0	0	0	0	0	
20109942	Amelia Trousers Black.42	1	60	0	0	0	0	0	0	
GB	Great Britain	339	13,531	0	0	34	10,525	341	0	
10000	The Cannon Group PLC B27 4...	0	0	0	0	25	9,663	336	0	
MASTER [B...	Master [blank]	0	0	0	0	25	9,663	336	0	
1964-W	INNSBRUCK Storage Unit/G.Door	0	0	0	0	10	2,920	0	0	

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

Code	Description	Quantity [1]	Amount GBP [1]	Discount GBP [1]	Budget Amount [1]	Quantity [2]	Amount GBP [2]	Discount GBP [2]	Budget Amount [2]
1964-W	INNSBRUCK Storage Unit/G.Door	0	0	0	0	10	2,920	0	0
1968-S	MEXICO Swivel Chair, black	0	0	0	0	3	351	19	0
1996-S	ATLANTA Whiteboard, base	0	0	0	0	7	6,030	317	0
70011	Glass Door	0	0	0	0	5	362	0	0
2000	The Fashion Store UK WC1 3...	330	11,880	0	0	0	0	0	0
2100	Lily Blouse	330	11,880	0	0	0	0	0	0
21002002	Lily Blouse Royal Blue.S	10	360	0	0	0	0	0	0
21002003	Lily Blouse Royal Blue.M	20	720	0	0	0	0	0	0
21002004	Lily Blouse Royal Blue.L	20	720	0	0	0	0	0	0
21002005	Lily Blouse Royal Blue.XL	10	360	0	0	0	0	0	0
21002006	Lily Blouse Royal Blue.XXL	5	180	0	0	0	0	0	0
21003502	Lily Blouse Orange.S	11	396	0	0	0	0	0	0
21003503	Lily Blouse Orange.M	21	756	0	0	0	0	0	0
21003504	Lily Blouse Orange.L	21	756	0	0	0	0	0	0
21003505	Lily Blouse Orange.XL	11	396	0	0	0	0	0	0
21003506	Lily Blouse Orange.XXL	5	180	0	0	0	0	0	0

SALES STATISTICS | WORK DATE: 10-9-2020

REQUEST PARAM.
Request No. TEST_1
Data Source Real-time
Data Source DateTime 25-5-2020 13:50

Global Filters
Intercompany: No
Series 1 Last Year - Date:
Series 2 This Year - Date:

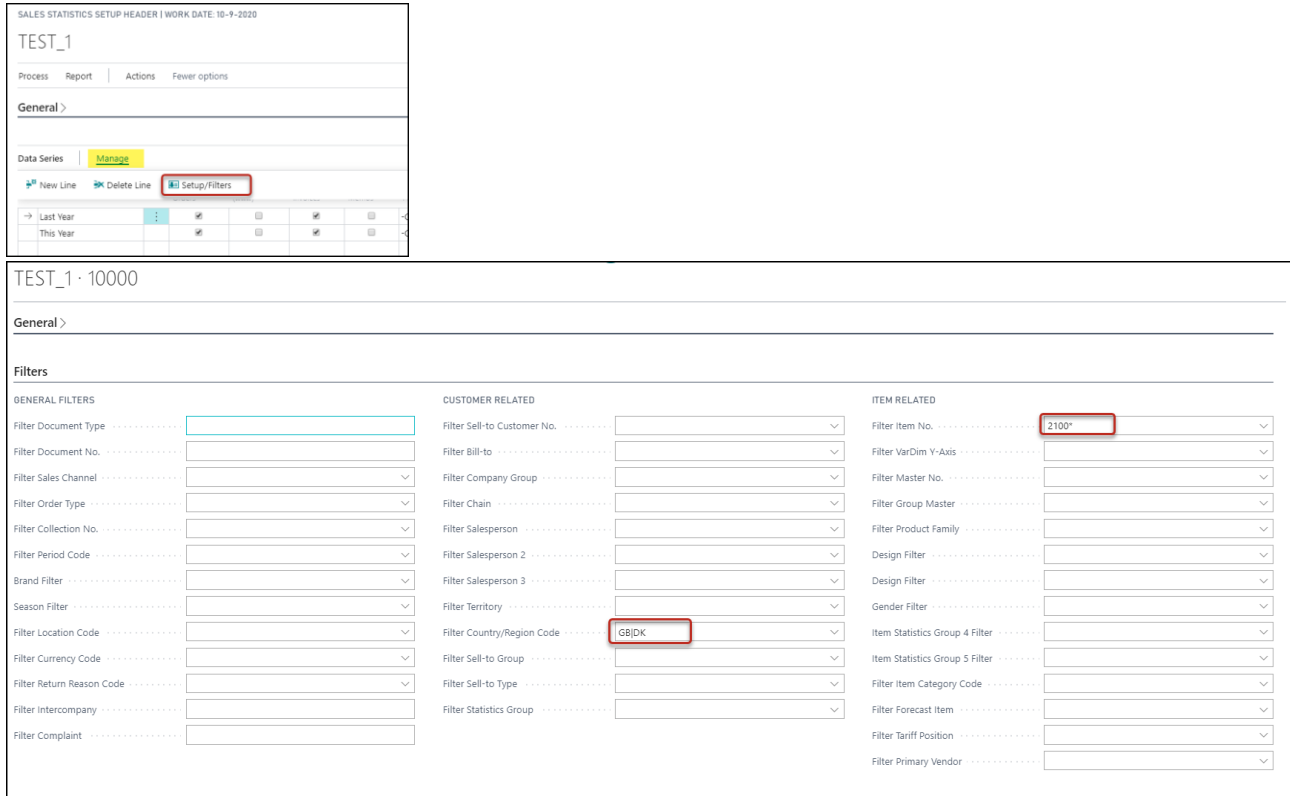
Print E-Mail Show Chart Show Gauge Excel Formatted Actions Fewer options

Code	Description	Quantity [1]	Amount GBP [1]	Discount GBP [1]	Budget Amount [1]	Quantity [2]
210099...	Lily Blouse Black,XXL	0	0	0	0	3
CW00030	Kristen R. Osborn MN 56201 Wilmar	3	259	0	0	

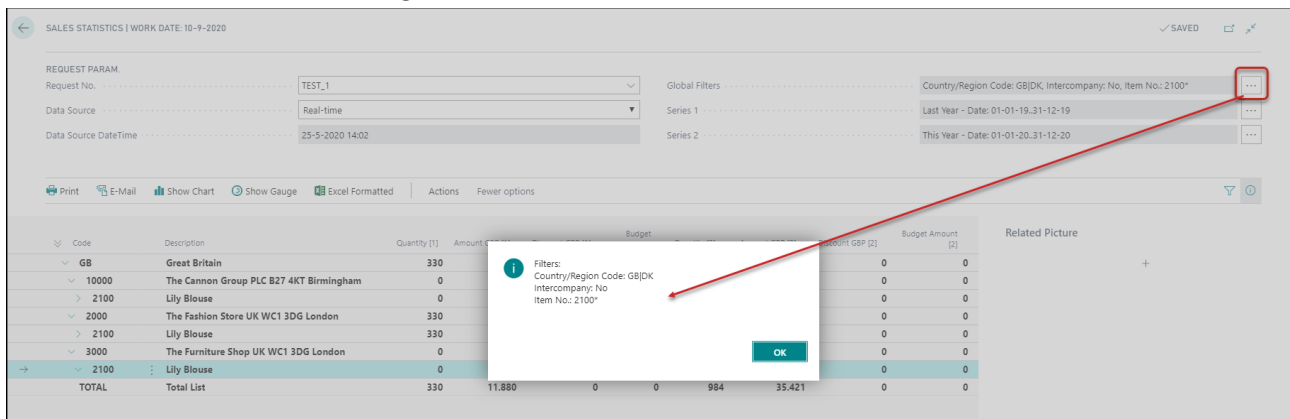
From this screen view, you can continue to use the other outputs of the statistics.

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

i.e.



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



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

PRINT

With the page action **Print**, you can calculate and print the statistics on paper. When you click the action **Print**, you will go to the **Extended Sales Statistics** report where all parameters are filled based on the setup of the **Setup No.** you come from. Although you do not see all setup parameters 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 parameters and send it to a recipient (user or salesperson) via E-Mail.

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

SHOW CHART

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

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

SHOW GAUGE

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

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

EXCEL FORMATTED

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

ITEM STATISTICS												
Date 20-12-18												

EXCEL LIST

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

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

ITEM STATISTICS																	
Date 20-12-18																	
Series	Country/Region Sell-to Customer No Master Item Text				Quantity	Net Amount	LCY Cost Amount	LCY Discount Amount	LCY Net Amount	Cost Amount	Discount Amount	Budget Qty.	Budget Amount	LCY Budget Cost	LCY Net Weight	Gross Weight	Volume
Last year - 01-01-18.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	10	202.5	124.34	0	202.5	124.34	0	0	0	0	8.5	9	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	20	405	254.18	0	405	254.18	0	0	0	0	17	18	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	20	415	274.46	0	415	274.46	0	0	0	0	17	18	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	10	207.5	139.38	0	207.5	139.38	0	0	0	0	8.5	9	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	5	103.75	69.69	0	103.75	69.69	0	0	0	0	4.25	4.5	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110010: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110400: Sweater Long Sleeve	11	222.75	137.434	0	222.75	137.434	0	0	0	0	9.35	9.9	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110400: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110400: Sweater Long Sleeve	21	425.25	266.889	0	425.25	266.889	0	0	0	0	17.85	18.9	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110400: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0
Last year - 01-01-18.31-12-18	GB	2000	2110	2110400: Sweater Long Sleeve	21	435.75	288.183	0	435.75	288.183	0	0	0	0	17.85	18.9	0
This year - 01-01-19.31-12-18	GB	2000	2110	2110400: Sweater Long Sleeve	0	0	0	0	0	0	0	0	0	0	0	0	0

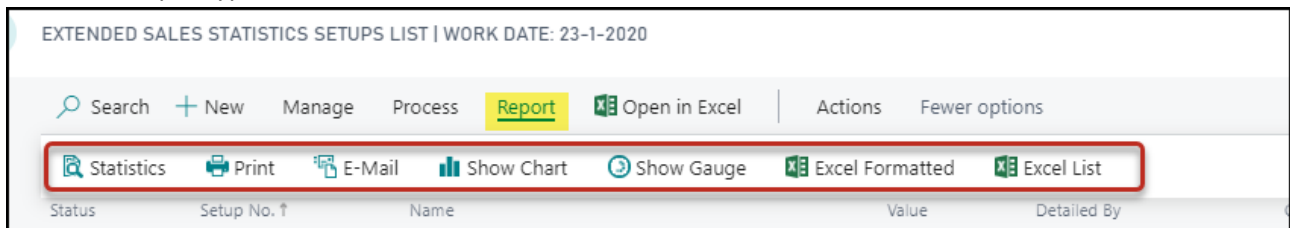
HOW TO USE EXTENDED SALES STATISTICS SETUP NOS.

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

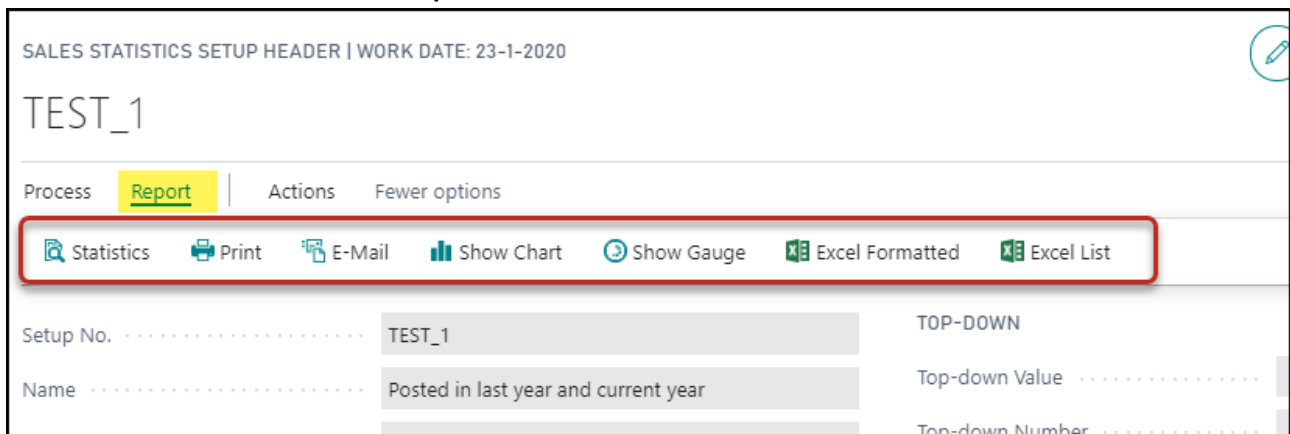
1. Via the [Extended Sales Statistics Setup Nos.](#)
2. Via the [Extended Sales Statistics Report](#)
3. In a [Statistics Overview](#)
4. As [Context Driven Statistics](#)

VIA EXTENDED SALES STATISTICS SETUP LIST

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

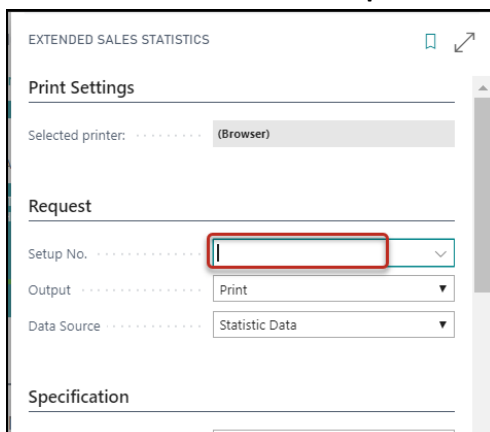


If you click **+ New** or **Manage**, **Edit** or **Manage**, **View**, you will see that the output functions are also available in the **Sales Statistics Setup Header**.



VIA EXTENDED SALES STATISTICS REPORT

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



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

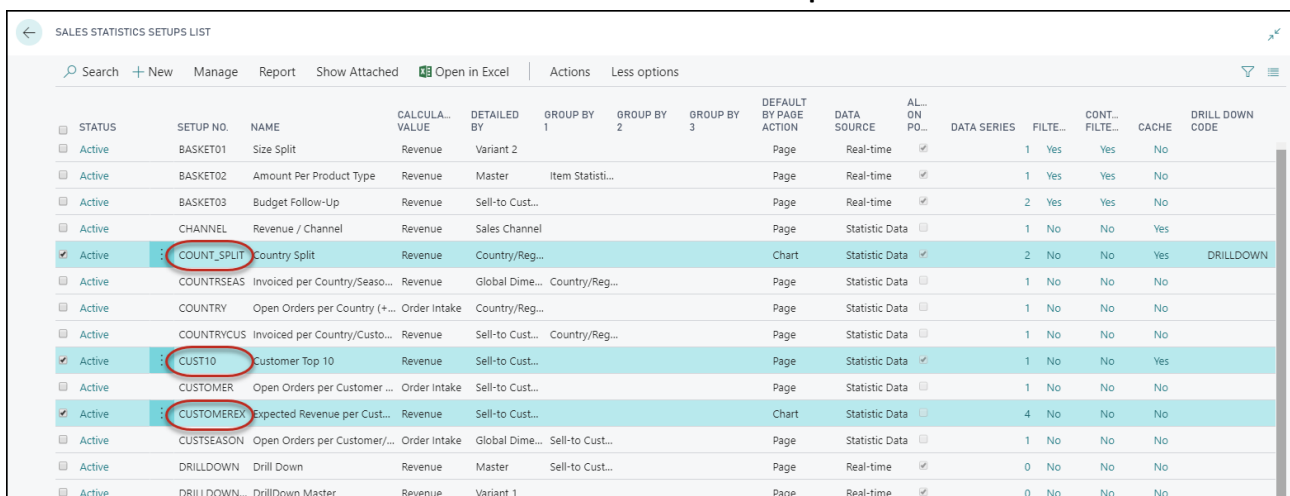
However, field values and filters changed or added afterwards will apply to the report. However, be aware that filters from the Setup No. are not shown in the FastTab **Filter Series 1** and **2** in the **Extended Sales Statistics** report, so you can by mistake overwrite filters from the Setup No.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

IN STATISTICS OVERVIEW

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

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

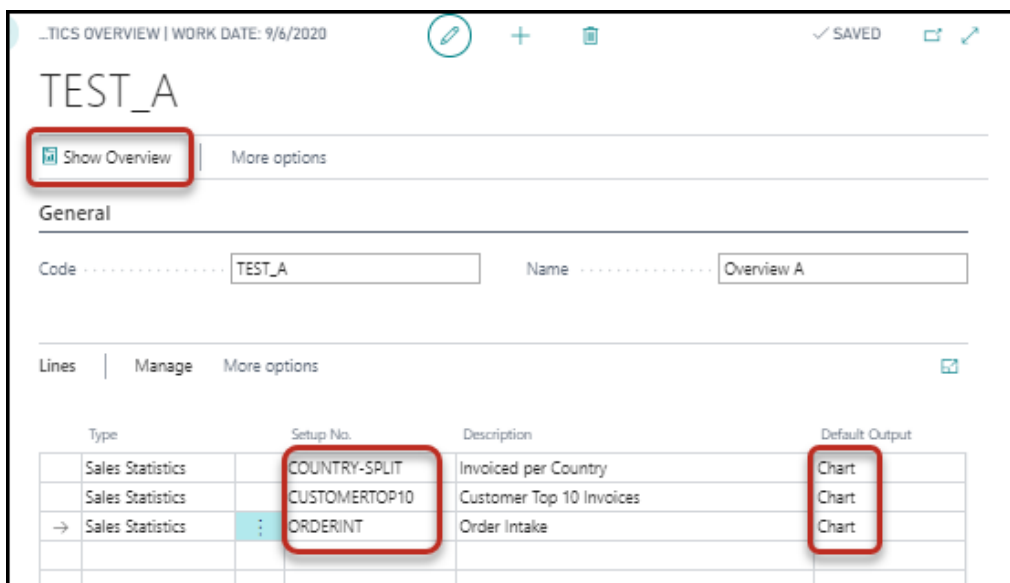
You can for instance choose three of **Extended Sales Statistics Setup Nos.**



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

and combine them in one **Statistics Overview**.

Open the **Statistics Overview List**, create a new **Code** and enter the three **Extended Sales Statistics Setup Nos.**



TEST_A

Show Overview More options

General

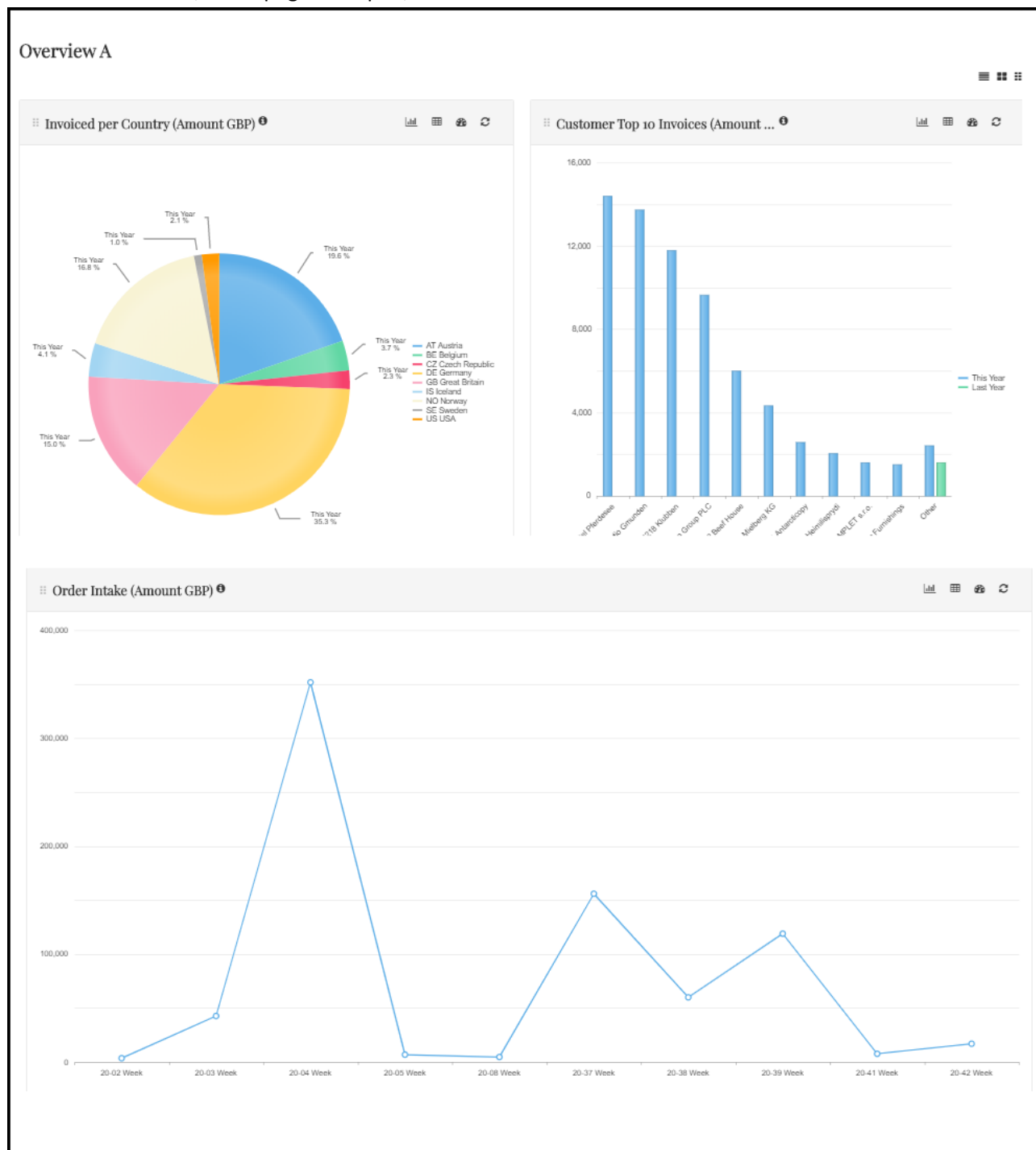
Code: TEST_A Name: Overview A

Lines Manage More options

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

The **DEFAULT OUTPUT** can only be *Chart* or *Gauge*.

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



AS CONTEXT DRIVEN STATISTICS

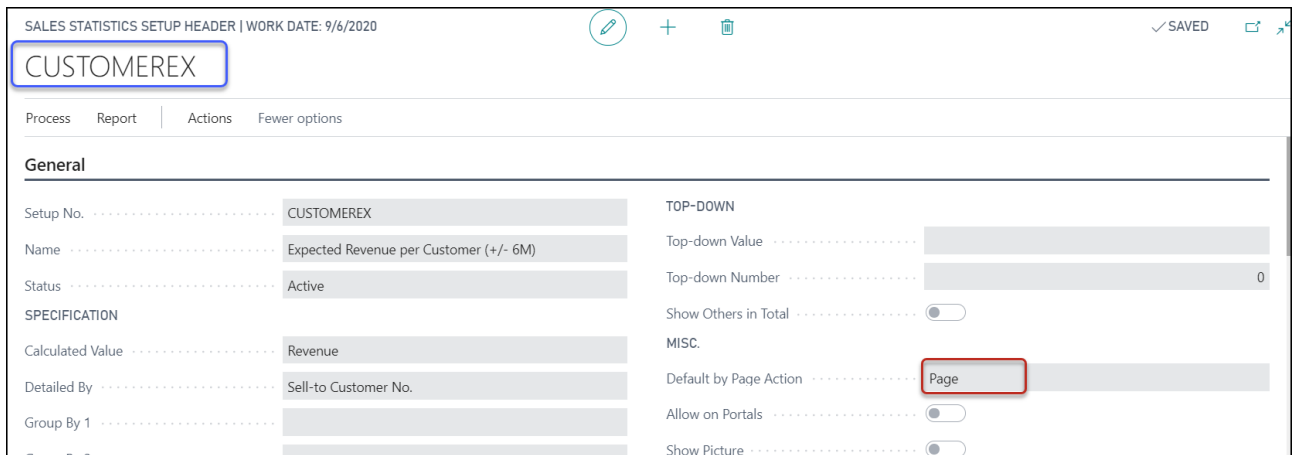
Context Driven Statistics are statistics using filter values taken from the record from which it is run.

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

Let us say that the record contains a **Sell-to Customer No.** and you want the statistics to be shown filtered on this no. 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*.



SALES STATISTICS SETUP HEADER | WORK DATE: 9/6/2020

CUSTOMEREX

Process Report Actions Fewer options

General

Setup No. CUSTOMEREX TOP-DOWN

Name Expected Revenue per Customer (+/- 6M) Top-down Value

Status Active Top-down Number 0

SPECIFICATION

Calculated Value Revenue Show Others in Total

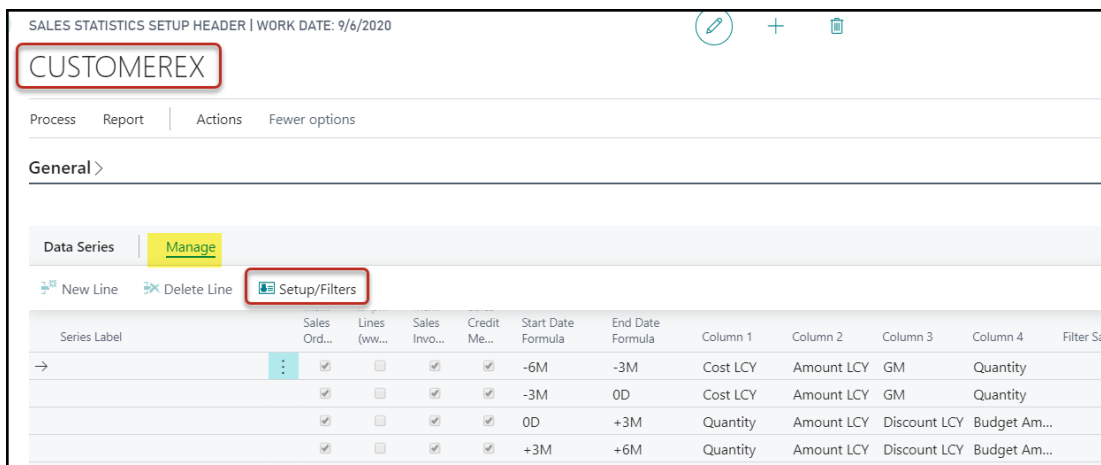
Detailed By Sell-to Customer No. MISC.

Group By 1 Default by Page Action Page

Group By 2 Allow on Portals

Show Picture

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



SALES STATISTICS SETUP HEADER | WORK DATE: 9/6/2020

CUSTOMEREX

Process Report Actions Fewer options

General

Data Series Manage

New Line Delete Line Setup/Filters

Series Label	Sales Ord...	Lines (ww...	Sales Invo...	Credit Me...	Start Date Formula	End Date Formula	Column 1	Column 2	Column 3	Column 4	Filter Sal
→	✓	✓	✓	✓	-6M	-3M	Cost LCY	Amount LCY	GM	Quantity	
	✓	✓	✓	✓	-3M	0D	Cost LCY	Amount LCY	GM	Quantity	
	✓	✓	✓	✓	0D	+3M	Quantity	Amount LCY	Discount LCY	Budget Am...	
	✓	✓	✓	✓	+3M	+6M	Quantity	Amount LCY	Discount LCY	Budget Am...	

SALES STATISTICS SETUP LINE | WORK DATE: 9/6/2020

CUSTOMEREX · 10000

General

TRANSACTIONS

Include Sales Orders ☒

Include Sales Import Lines (www) ☐

Include Sales Invoices ☒

Include Sales Credit Memos ☒

DATES

Start Date Formula -6M

End Date Formula -3M

COLUMNS

Series Label

Filters

GENERAL FILTERS

Filter Document Type

Filter Document No.

Filter Sales Channel

Filter Order Type

Filter Collection No.

CUSTOMER RELATED

Filter Sell-to Customer No.

Filter Bill-to

Filter Company Group

Filter Chain

Filter Salesperson

ITEM RELATED

Filter Item No.

Filter VarDim Y-Axis

Filter Master No.

Filter Group Master

Filter Product Family

Don't 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**.

Search + New Edit List Delete Open in Excel

EDIT - EDIT PAGE ACTIONS

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**.

Search + New Edit List Delete Open in Excel

EDIT - EDIT PAGE ACTIONS

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

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

CRONUS TRIMIT W1 Ltd. Finance Sales Purchase Product Design Logistics Portals Posted Documents

Sales Orders: All Search + New Delete Report Order Release Posting Print/Send Navigate

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sales Channel	Location Code	Assigned User ID	Document Date
6003	49633663	Autohaus Mielberg KG			GREEN		10/18/20
6004	49633663	Autohaus Mielberg KG			GREEN		1/24/21
P0001	2000	The Fashion Store UK			CW		1/23/21
P0002	3000	The Furniture Shop UK			CW		1/23/21
P0003	01454545	New Concepts Furniture			CW		1/23/21
P0004	2000	The Fashion Store UK			CW		1/23/21
P0005	01905893	Candox Canada Inc.			CW		1/23/21
P0006	2000	The Fashion Store UK			CW		1/23/21
P0007	10000	The Cannon Group PLC			CW		1/23/21
P0008	2000	The Fashion Store UK			CW		1/23/21
P0009	3000	The Furniture Shop UK			CW		1/23/21

Details Attachments (0)

Email

Fax No.

Credit Limit (LCY) 0.00

Available Credit (LCY) 0.00

Payment Terms Code PAYNOW

Contact Charley Nelson

Page Actions

Name

Invoiced per Country/Customer (+/- 1Y)

SALES STATISTICS | WORK DATE: 9/6/2020

SAVED

REQUEST PARAM.

Request No. CUSTOMEREX
Global Filters Intercompany: No. Sell-to Customer No.: 2000

Data Source Real-time
Series 1 - Date: 03/06/20..06/06/20

Data Source DateTime 5/25/2020 3:31 PM
Series 2 - Date: 06/06/20..09/06/20

Print
E-Mail
Show Chart
Show Gauge
Excel Formatted
Actions
Fewer options

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

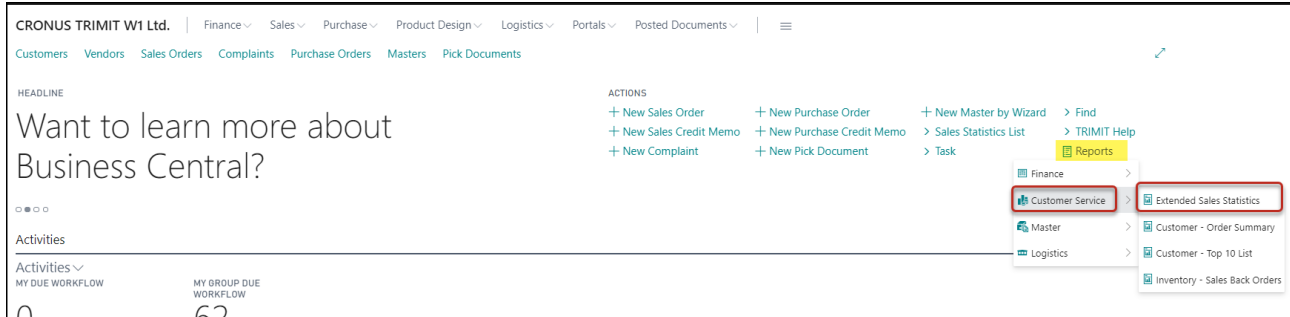
You can also run a [Statistics Overview](#) from the FactBox.

EDIT - EDIT PAGE ACTIONS							
Default Collapse	Type	No. / Link	Name	Use Record	Only Current Company	Company Name	
	Sales Statistics	CUSTOMEREX	Expected Revenue per Customer (+/- 6M)	Yes			
	Statistics Overview	TEST_A	Overview A	Yes			

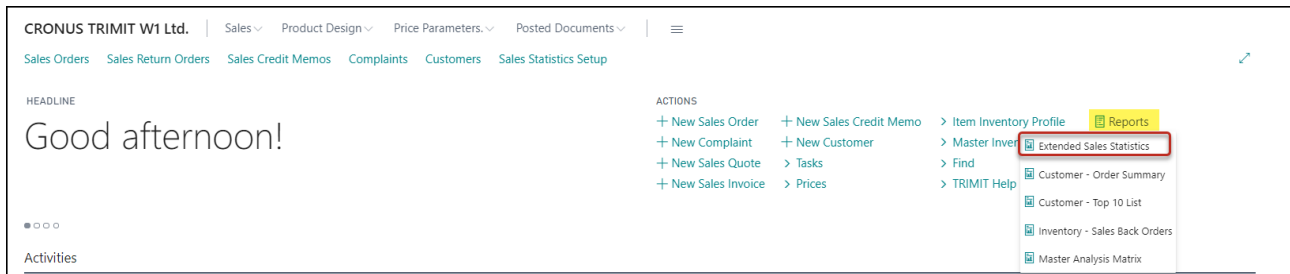
EXTENDED SALES STATISTICS REPORT

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

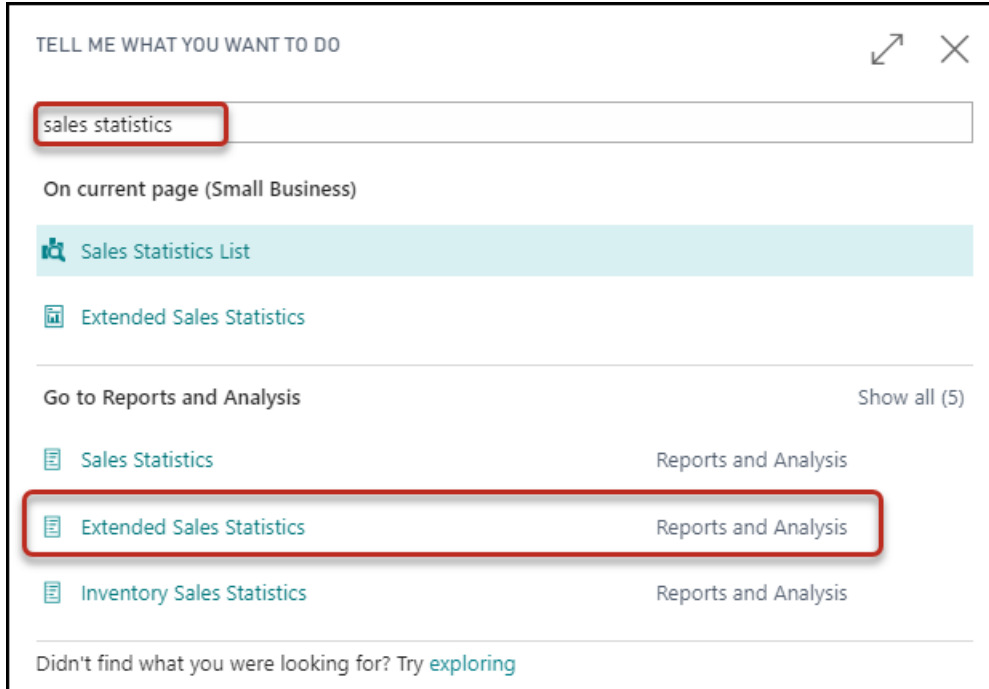
In the **TRIMIT Small Business Role Center**, you can start it via:



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



In addition, via **Tell me..** you can find it as well:



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

Header or from a **Setup No.** in the **Extended Sales Statistics Setup List**, the **Extended Sales Statistics** report is automatically opened with all the settings from the Setup No.

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

EXTENDED SALES STATISTICS

Print Settings >

Request >

Specification >

Series 1 >

Series 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...

Filter: Filter Series 2 >

0 filters set

Send to...

Print

Preview

Cancel

FASTTAB REQUEST

EDIT - EXTENDED SALES STATISTICS

Request

Setup No.

Output

Print

Data Source

Statistic Data

SETUP NO.

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

OUTPUT

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

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

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

DATA SOURCE

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

NOTE

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

FASTTAB SPECIFICATION

Specification	
Calculated Value	Revenue ▼
Detailed By	Sell-to Customer No. ▼
Group By 1	▼
Group By 2	▼
Group By 3	▼
Print as Matrix	☐

CALCULATED VALUE

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

DETAILED BY

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

GROUP BY 1, 2 & 3

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

PRINT AS MATRIX

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

FASTTAB SERIES 1 & 2

Series 1	
Include Sales Orders	☐
Include Sales Invoices	☐
Include Sales Credit Memos	☐
Start Date	
End Date	
COLUMNS	
Print Period 1 Column 1	Quantity ▼
Print Period 1 Column 2	Amount LCY ▼
Print Period 1 Column 3	Discount LCY ▼
Print Period 1 Column 4	Budget Amount ▼

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

INCLUDE SALES ORDERS

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

INCLUDE SALES INVOICES

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

INCLUDE SALES CREDIT MEMOS

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

START DATE

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

END DATE

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

COLUMNS

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

FASTTAB FILTER SERIES 1 & 2

Filter Series 1

Show results:

Where:
Filter Sell-to Customer No.
is:

And:
Filter Salesperson
is:

And:
Filter Country/Region Code
is:

And:
Filter Item No.
is:

And:
Filter Master No.
is:

And:
Filter Group Master
is:

And:
Filter Sales Channel
is:

And:
Filter Order Type
is:

And:
Filter Collection No.
is:

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 35 different customer and item related topics. By default, 9 of the filters are available on the FastTab and you can change those for the remaining 26 that are necessary for your current analysis.

Note that only those of the following where “filter” is part of the name can be used:

Brand Filter Column 1 Column 2 Column 3 Column 4 Context Filters Creation Date End Date End Date Formula Entry No. Filter Bill-to Filter Chain Filter Collection No. Filter Company Group Filter Complaint Filter Country/Region Code Filter Currency Code Filter Document No Filter Document Type	Filter Forecast Item Filter Group Master Filter Intercompany Filter Item Category Code Filter Item No. Filter Item Statistics Group Filter Item Statistics Group 2 Filter Item Statistics Group 3 Filter Item Statistics Group 4 Filter Item Statistics Group 5 Filter Location Code Filter Master No. Filter Order Type Filter Period Code Filter Primary Vendor Filter Product Family Filter Sales Budget Filter Sales Channel Filter Salesperson Filter Salesperson 2	Filter Salesperson 3 Filter Sell-to Customer No. Filter Sell-to Group Filter Sell-to Type Filter Statistics Group Filter Tariff Position Filter Territory Filter VarDim Y-Axis Filters Include Sales Credit Memos Include Sales Import Lines (www) Include Sales Invoices Include Sales Orders Modified Date Return Reason Code Season Filter Series Label Setup No. Skip Copy Filters Start Date Start Date Formula Temp Date Filter Use in Gauge as
--	---	---

When you enter filters into the first data series, they will be inherited to the next data series, but only if no filters are set there.

NOTE

Brand Filter is the **Global Dimension 1 Filter** as set in the demo company.

Season Filter is the **Global Dimension 2 Filter** as set in the demo company.

EXAMPLES

EXPECTED REVENUE PER CUSTOMER/MASTER

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

SALES STATISTICS SETUP HEADER

EXP_CUST_MASTER

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

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

General

Setup No. EXP_CUST_MASTER

TOP DOWN

MISC.

Name Expected Revenue per Customer/Master

Top Down Value

Default by Page Action Page

Status Active

Top Down Number 0

Allow on Portals ☐

SPECIFICATION

Show Others in Total ☐

Show Picture ☐

Calculated Value Revenue

Explode Assortment ☐

Detailed By Master

Drill Down Code

Group By 1 Sell-to Customer No.

Group By 2

Group By 3

Data Series | [Manage](#)

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

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

SALES STATISTICS PAGE

Request No. EXP_CUST_MASTER

Series 1 Current Month - Date: 01-01-19..30-01-19

Data Source Real-time

Series 2 Next Months this year - Date: 01-02-19..30-12-19

Global Filters Intercompany: No, Sell-to Customer No.: 2*[3]

[Manage](#) Process Actions Less options

[Expand All](#)
[Collapse All](#)

CODE	DESCRIPTION	QUANTITY [1]	AMOUNT GBP [1]	COST [1]	GM [1]	QUANTITY [2]	AMOUNT GBP [2]	COST [2]	GM [2]
2000	The Fashion Store UK WC1 3DG Lond...	770	12.793	9.894	23	132	2.930	1.104	62
2110	Sweater Long Sleeve	660	10.211	8.851	13	0	0	0	0
2120	Ladies Blouse	86	1.742	712	59	0	0	0	0
2210	Ski Jack	0	0	0	0	48	1.488	497	67
2310	Coverall Viscose	0	0	0	0	51	536	246	54
2820	Trouser Folded	0	0	0	0	24	546	186	66
2830	Jacket Hanging	24	840	331	61	0	0	0	0
2840	Sweater Own Production Hanging	0	0	0	0	9	360	175	51
20000	Selangorian Ltd. CV6 1GY Coventry	163	9.200	5.837	37	0	0	0	0
MASTER [8...	Master (blank)	163	9.200	5.837	37	0	0	0	0
2010	The Shoe Store Europe NL-1009 AG ...	42	732	538	53	1.379	121.305	37.217	80
2120	Ladies Blouse	42	732	538	53	0	0	0	0
2700	Men's Brogue	0	0	0	0	1.350	120.603	36.758	80
2820	Trouser Folded	0	0	0	0	17	322	203	59
2830	Jacket Hanging	0	0	0	0	12	380	256	56
2020	Sportswear A/S DK-8800 Viborg	21	429	352	47	495	44.221	13.536	80
2135	Polo Shirt Sizes and Assortments	21	429	352	47	0	0	0	0
2700	Men's Brogue	0	0	0	0	495	44.221	13.536	80

INCOMING ORDERS PER CUSTOMER WITH SUBTOTALS PER SALESPERSON

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

SALES STATISTICS SETUP HEADER

+

INC_CUST_SALESP

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

Activate

Make Inactive

General

Setup No.

INC_CUST_SALESP

TOP DOWN

Top Down Value

Top Down Number

Show Others in Total

MISC.

Default by Page Action

Allow on Portals

Show Picture

Explode Assortment

Drill Down Code

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

Data Series

Manage

New Line

Delete Line

Setup/Filters

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

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

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

SALES STATISTICS PAGE

Request No.

INC_CUST_SALESP

Data Source

Real-time

Global Filters

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

Series 1

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

Series 2

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

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

Expand All

Collapse All

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

ORDERS OF TODAY INCLUDING MATRIX

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

SALES STATISTICS SETUP HEADER

ORDERS_TODAY

Process

Report

Show Attached

Actions

Less options

Statistics

Print

E-Mail

Show Chart

Show Gauge

Excel Formatted

Excel List

General

Setup No. ORDERS_TODAY

TOP DOWN

MISC.

Name Todays Orders incl. Matrix

Top Down Value

Default by Page Action Page

Status Active

Top Down Number 0

Allow on Portals ☐

SPECIFICATION

Show Others in Total ☐

Show Picture ☐

Calculated Value Order Intake

Explode Assortment ☐

Detailed By Item

Drill Down Code

Group By 1

Group By 2

Group By 3

Data Series | Manage

New Line

Delete Line

Setup/Filters

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

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

SALES STATISTICS PAGE

Request No. ORDERS_TODAY

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

Data Source Real-time

Series 1

Manage

Process

Actions

Less options

Expand All

Collapse All

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

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

ITEM ORDER INTAKE STATISTICS

CRONUS TRIMIT International Ltd.

20. December 2018

Page 1

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

CORNATORIKBI

Item	24-01-19								24-01-19			
	Quantity								Quantity	Amount GBP	Cost	GM
1920-S ANTWERP Conference Table									1	420	328	22
2110 Sweater Long Sleeve	XS	S	M	L	XL	XXL						
White		172	324	344	196	100		1,136				
Green		22	43	53	42	32		192				
Purple		21	32	42	31	20		146				
Black	3	215	428	485	274	151		1,556				
Total 2110 Sweater Long Sleeve									3030	38139	0	-5,9
2120 Ladies Blouse	38	38	40	42	44	46	48					
White	1	2	3	3	2	2	1	14				
Pink	2	4	6	4	6	4	2	28				
Purple	2	5	8	9	6	5	2	37				
Black	3	7	11	12	8	7	3	51				
Blue	2	4	6	7	5	4	2	30				
Total 2120 Ladies Blouse									160	3126,00	0	57,5
2135 Polo Shirt Sizes and Assortments	S	M	L	XL	XXL	AA	BB	CC				
Charcoal	1	2	2	2	1				8			
White	1	2	3	2	1				9			
Black						1	1	2	4			
Total 2135 Polo Shirt Sizes and Assortments									21	431	352	47,3
2180 Polo Shirt Private Label	XS	S	M	L	XL	XXL						
White	2	4	4	2	2	2			16			
Total 2180 Polo Shirt Private Label									16	320,00	160	50,0
2190000001 Tailor Made Men's Shirt									2	114	39	66
2210 Ski Jack	38	38	40	42	44	46	48	50	52			
	L2	54	56	58	60							
Brown		1	2	3	4	3	2	1		16		
Grey		1	2	3	4	3	2	1		16		
Charcoal		1	2	3	4	3	2	1		16		
Total 2210 Ski Jack									48	1488,00	495	66,7
2310 Coverall Viscose	S	M	L	XL	XXL	3XL	4XL	5XL				

EXPECTED REVENUE WITH SUBTOTALS AND BUDGETS

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

Sales Budget Overview

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

General

Item Budget Name Show Value as Rounding Factor
Show as Lines View by Show Column Name ☐
Show as Columns

Sales Budget Overview Matrix

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

Filters

Date Filter Customergroup Filter Brand Filter
Customer Filter Salesperson Filter Season Filter
Item Filter Budget Dimension 3 Filter

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

SALES STATISTICS SETUP HEADER

REV_CUST_BUDG

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

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

General

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

Data Series | [Manage](#)

New Line Delete Line Setup/Filters

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

SALES STATISTICS PAGE

Request No.

REV_CUST_BUDG

Data Source

Real-time

Global Filters

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

Series 1

Manage

Process

Actions

Less options

Expand All

Collapse All

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

This is with the following filters:



Filters:

Date: 01-01-19..30-12-19

Intercompany: No

Master No.: 2110

Sales Budget: BUDGET 19

OK

TOP 10 MASTERS

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

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

SALES STATISTICS SETUP HEADER

TOP10_MASTERS

Process Report Show Attached Actions Less options

Activate Make Inactive

General

Setup No.: TOP10_MASTERS TOP DOWN MISC.

Name: Top 10 of Masters Revenue Top Down Value: Amount LCY Default by Page Action: Page

Status: Active Top Down Number: 10 Allow on Portals: ☐

SPECIFICATION Show Others in Total: ☐

Calculated Value: Revenue Show Picture: ☐

Detailed By: Master Explode Assortment: ☐

Group By 1: Drill Down Code:

Group By 2:

Group By 3:

Data Series Manage

New Line Delete Line Setup/Filters

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

SALES STATISTICS PAGE

Request No.: TOP10_MASTERS Global Filters: Date: 01-01-19, 31-12-19, Intercompany No, Master No.: <>""

Data Source: Real-time Series 1: This year

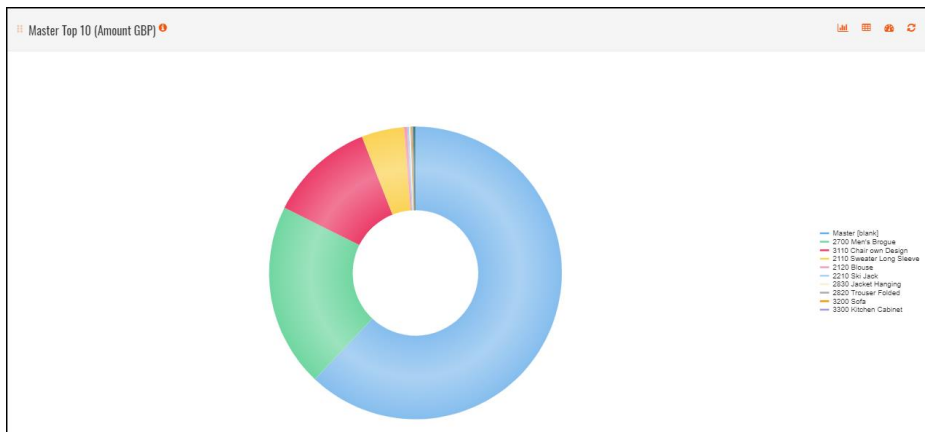
Manage Process Actions Less options

Expand All Collapse All

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

Alternatively, perhaps:

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



GAUGE WITH REVENUE THIS YEAR AS PERCENTAGE OF LAST YEAR

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

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

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

SALES STATISTICS SETUP HEADER

GAUGETEST

Process Report Show Attached Actions Less options

General

Setup No. GAUGETEST TOP DOWN MISC.

Name Revenue This Year as % of Last Year Top Down Value 0 Default by Page Action Gauge

Status Inactive Top Down Number 0 Allow on Portals

SPECIFICATION Show Others in Total

Calculated Value Revenue

Detailed By Sell-to Customer No. Explode Assortment

Group By 1

Group By 2

Group By 3

Drill Down Code

Data Series Manage

SERIES LABEL	INC... SAL... IMP... INC... INC... START DATE END DATE COLUMN 1 COLUMN 2 COLUMN 3 COLUMN 4 FILTER SALES BUDGET USE IN GAUGE AS FILT... CO...
Last Year	INC... SAL... IMP... INC... INC... START DATE END DATE COLUMN 1 COLUMN 2 COLUMN 3 COLUMN 4 FILTER SALES BUDGET USE IN GAUGE AS FILT... CO...
This Year	INC... SAL... IMP... INC... INC... START DATE END DATE COLUMN 1 COLUMN 2 COLUMN 3 COLUMN 4 FILTER SALES BUDGET USE IN GAUGE AS FILT... CO...

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

Gauge

Gauge Value Type Percent Threshold 1 50

Min Value 0 Threshold 2 125

Max Value 200 Range Style Unfavorable -> Favorable

SALES STATISTICS PAGE

Request No. GAUGETEST

Data Source Real-time

Global Filters Intercompany: No

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

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

Manage Process Actions Less options

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