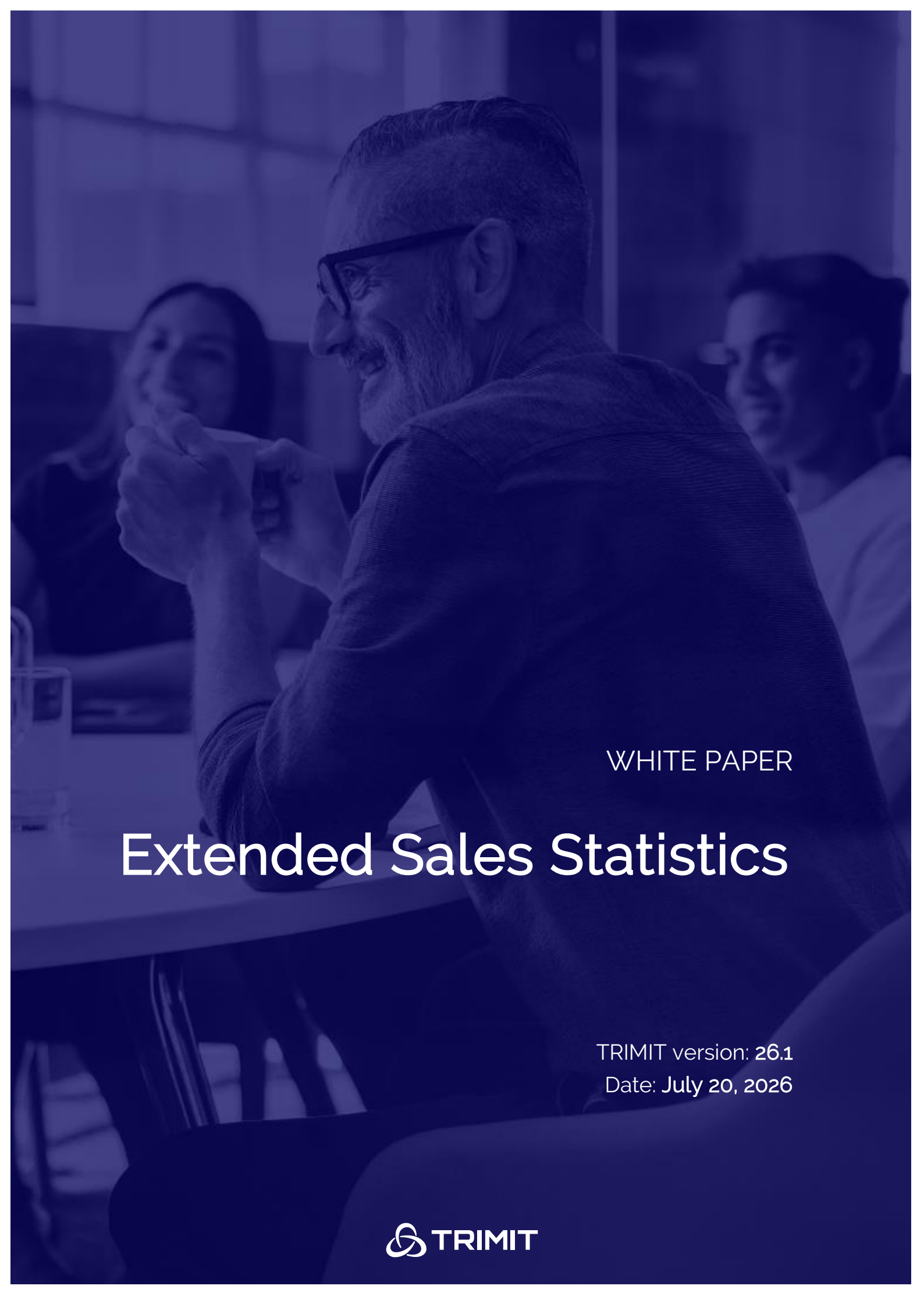




WHITE PAPER

# Extended Sales Statistics

TRIMIT version: 26.1

Date: July 20, 2026

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# Introduction

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

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

It can 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 TRIMIT e-commerce.

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 on 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 26.1 for Business Central W1 BC28.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 26.1**, which is based on Microsoft Dynamics 365 Business Central 2026 Release Wave 1, 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 contain 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*  
*6036851 trm Update Statistics Data*

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

Default Include Intercompany in Sales Statistics ..... ☐

Standard Customer ..... STD

Summary Invoice

Filter Summary Invoice ..... None

Summary Invoicing Controlled by ..... Sell-to Customer No.

Generate Summary Order by Batch Posting ..... ☐

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 <b>Creation Date</b> from the Sales Line will be taken into the Sales Statistics. |
| Order Date    | The <b>Order Date</b> from the Sales Line will be taken into the Sales Statistics.    |

### Default Include Intercompany in Sales Statistics

If set to *TRUE*, the **Extended Sales Statistics** and **Sales Analytics**, will automatically include the Intercompany Sales Documents.

If set to *FALSE*, you are still able to include Intercompany Sales Documents by setting up the **Filter Intercompany** for a Data Series, which is not necessary if the Parameter has been set to *TRUE*.

## 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*.

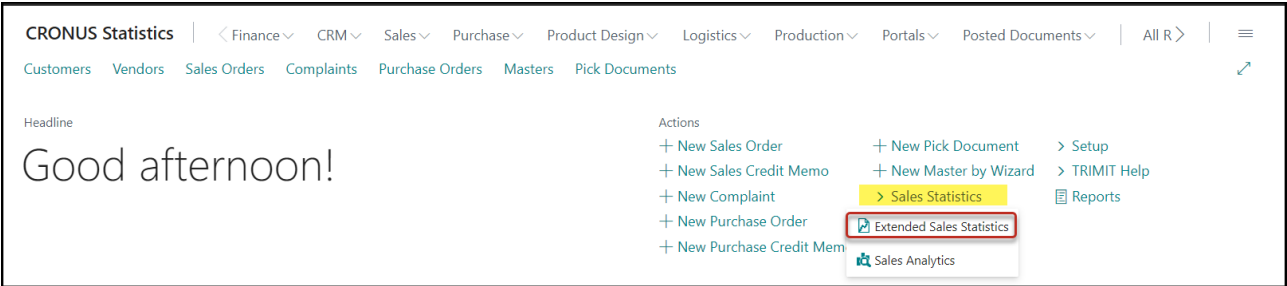
Because of performance, which is particularly important for Statistics generated and shown on TRIMIT e-commerce, it is recommended to use this possibility where 100% updated Data is not crucial. However, some Statistics will always require Real-time data, i.e., a Statistic on an existing Sales Order.

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

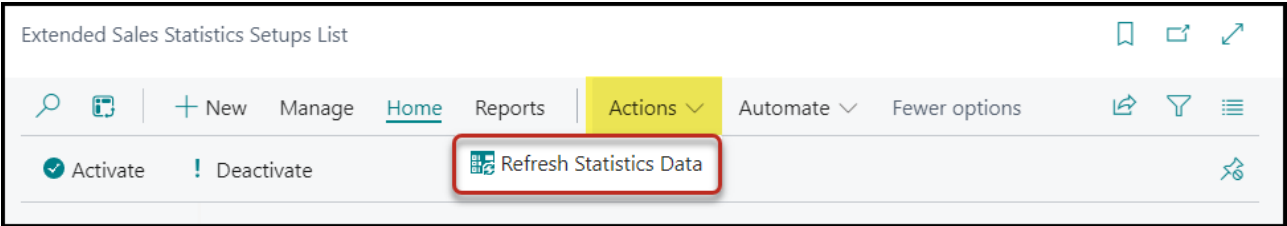
When the Codeunit *trm Statistics Query Handler* is run manually (i.e., via the **Extended Sales Statistics Setups List**) or in a Job Queue Entry, Posted Sales Invoices, Posted Credit Memos, and Sales Import Lines (from TRIMIT e-commerce or Integrations) are added to the Table *6036854 trm Statistics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

# Manually

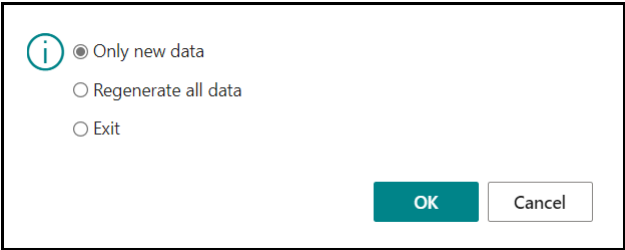
In Role Center *TRIMIT Small Business, Sales Statistics, Extended Sales Statistics* or *Search Extended Sales Statistics Setups List*:



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

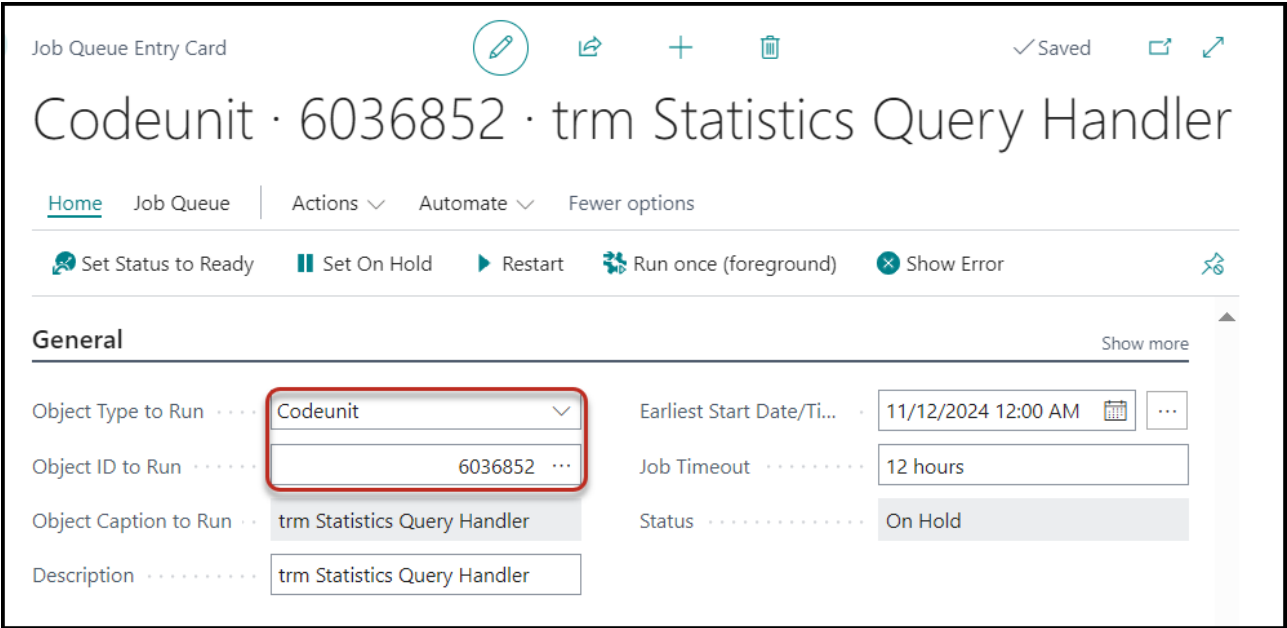


In that case, you can also choose if you want to update the Statistics Data only with the new Data since last update: **Only new data** or if you want to regenerate all the Statistics Data: **Regenerate all data**.



## Via Job Queue Entry

Via **Search Job Queue Entry**:



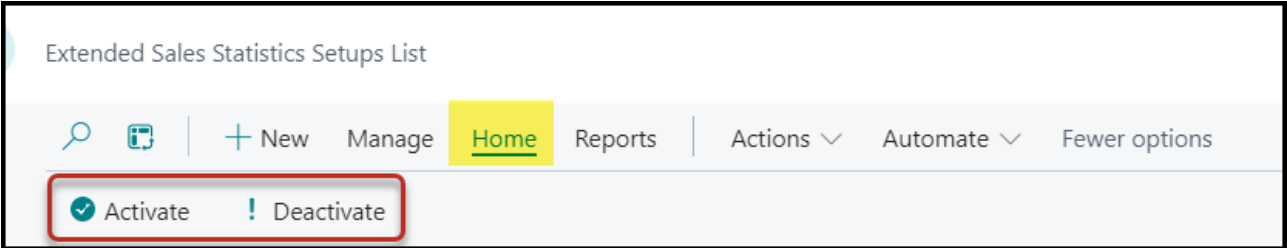
# Extended Sales Statistics Setups

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.

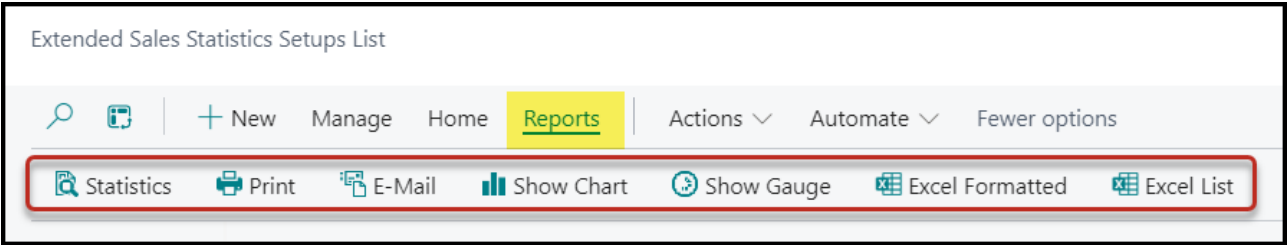
Therefore, you can create **Extended Sales Statistics Setups** with all the necessary settings and filters.

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

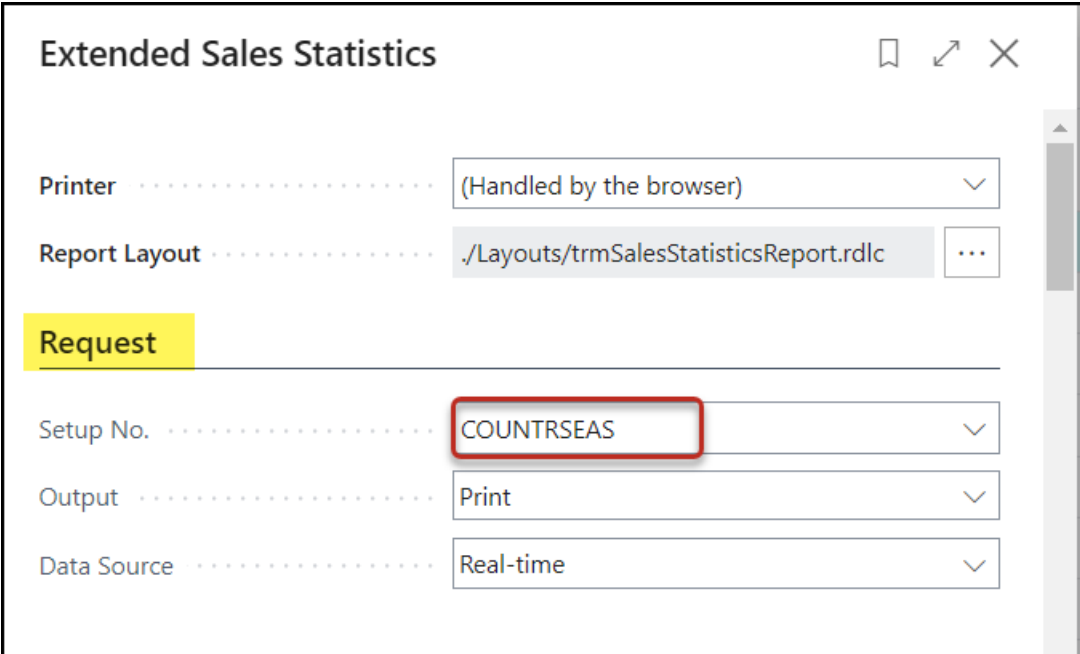


See [Status](#) for the details.

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



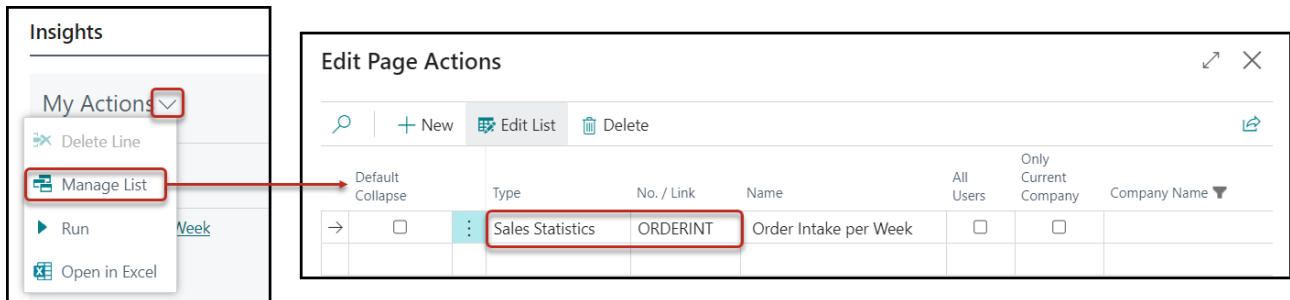
In addition, the **Setup No.** can also be used on the FastTab **Request** of the **Extended Sales Statistics** Report by selecting it from a look-up in the Sales Statistics Setup List.



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

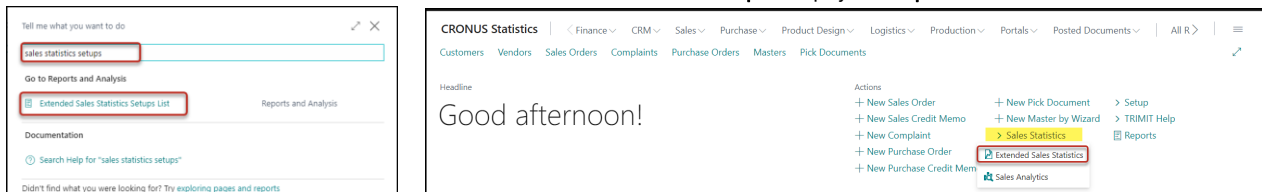


In the TRIMIT Demo Company, there are several examples of **Extended Sales Statistics Setups** that also can be chosen directly on the **My Actions** ListPart page in the TRIMIT Role Centers and in the **Page Actions** FactBox in many other pages by choosing the **Type Sales Statistics**.  
Learn more about the usage of these ListPart page and FactBoxes in the *White Paper – TRIMIT Role Center Features*.

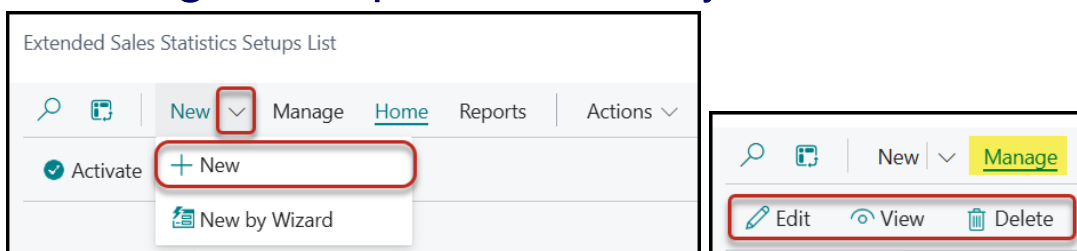


## Extended Sales Statistics Setup Nos.

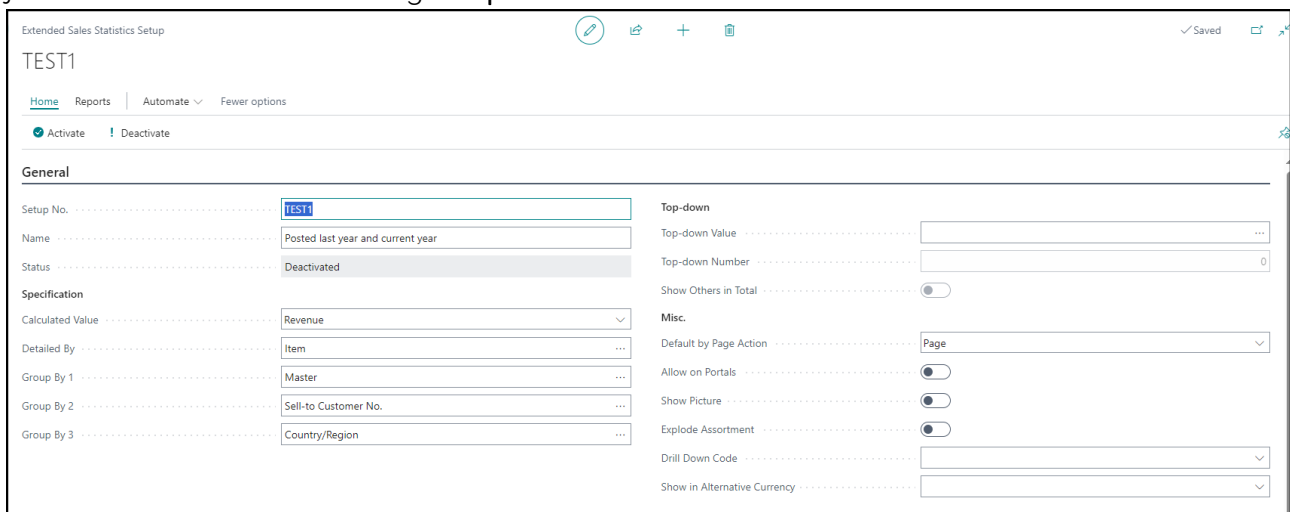
You can maintain the **Extended Sales Statistics Setups** via **Search Sales Statistics Setups** or – when using the **TRIMIT Small Business** Role Center - by clicking **Sales Statistics, Extended Sales Statistics**. From now on, we will call the **Extended Sales Statistics Setup** simply **Setup No.**



## Creating a Setup No. Manually



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



## FastTab General

### Setup No.

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

### Name

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

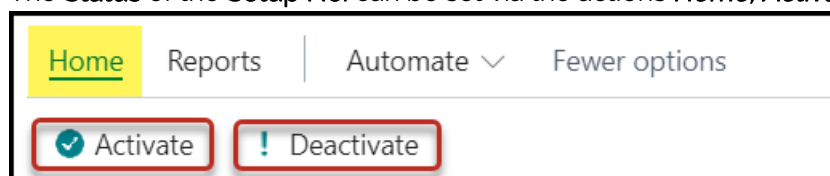
### Status

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 <b>Setup No.</b> can be changed, the <b>Setup No.</b> cannot be chosen in the <b>Extended Sales Statistics</b> Report, and you cannot execute the Statistics. |
| Active      | The fields of the <b>Setup No.</b> cannot be changed, the <b>Setup No.</b> can be chosen in the <b>Extended Sales Statistics</b> 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 into the <b>Start-/End Date</b> <sup>*)</sup> or <b>Start-/End Date Formula</b> of the <i>Data Series</i> lines.<br>These Dates will be compared with the <b>Shipment Date</b> of the Sales Documents and Sales Import Lines and the <b>Posting Date</b> of the Posted Sales Invoices and Posted Credit Memos.                                                                                                                                                                                                                                                                                                        |
| Order Intake | Shows the Amounts/Quantities in the selected intervals, entered into the <b>Start-/End Date</b> <sup>*)</sup> or <b>Start-/End Date Formula</b> of the <i>Data Series</i> lines.<br>Included in the Statistics will be: <ul style="list-style-type: none"><li>➔ Open Sales Orders and Sales Import Lines with <i>Creation Date</i> or <i>Order Date</i><sup>**) </sup> within the Date interval defined in the <i>Data Series</i> lines.</li><li>➔ Posted Sales Invoices and Posted Credit Memos based on closed Sales Orders with <i>Creation Date</i> or <i>Order Date</i><sup>**) </sup> within the Date interval defined in the <i>Data Series</i> lines.</li></ul>               |
| Order Book   | Shows the Amounts/Quantities <u>until</u> a specific Date which must be entered into both <b>Start -/End Date</b> <sup>*)</sup> or both <b>Start/End Date Formula</b> of the <i>Data Series</i> lines.<br>Included in the Statistics will be: <ul style="list-style-type: none"><li>➔ Open Sales Orders and Sales Import Lines with <i>Creation Date</i> or <i>Order Date</i><sup>**) </sup> equal to or before the stated Date.</li><li>➔ 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><sup>**) </sup> equal to or before the stated Date.</li></ul> |

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

<sup>\*\*)</sup>  *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       | Lily Blouse Royal Blue.S               | 0            | 0              | 0                | 0                     | 26           | 936            | 0                | 0                     |
| 21002003       | Lily Blouse Royal Blue.M               | 0            | 0              | 0                | 0                     | 52           | 1,871          | 0                | 0                     |
| 21002004       | Lily Blouse Royal Blue.L               | 0            | 0              | 0                | 0                     | 53           | 1,907          | 0                | 0                     |
| 21002005       | Lily Blouse Royal Blue.XL              | 0            | 0              | 0                | 0                     | 28           | 1,008          | 0                | 0                     |
| 21002006       | Lily Blouse Royal Blue.XXL             | 0            | 0              | 0                | 0                     | 12           | 432            | 0                | 0                     |
| 21002007       | Lily Blouse Royal Blue.3XL             | 0            | 0              | 0                | 0                     | 1            | 36             | 0                | 0                     |
| 21003002       | Lily Blouse Yellow.S                   | 0            | 0              | 0                | 0                     | 25           | 900            | 0                | 0                     |
| 21003003       | Lily Blouse Yellow.M                   | 0            | 0              | 0                | 0                     | 50           | 1,800          | 0                | 0                     |
| 21003004       | Lily Blouse Yellow.L                   | 0            | 0              | 0                | 0                     | 50           | 1,800          | 0                | 0                     |
| 21003005       | Lily Blouse Yellow.XL                  | 0            | 0              | 0                | 0                     | 50           | 1,800          | 0                | 0                     |
| 21003006       | Lily Blouse Yellow.XXL                 | 0            | 0              | 0                | 0                     | 25           | 900            | 0                | 0                     |
| 21003002       | Lily Blouse Orange.S                   | 0            | 0              | 0                | 0                     | 15           | 540            | 0                | 0                     |
| 21003003       | Lily Blouse Orange.M                   | 0            | 0              | 0                | 0                     | 35           | 1,260          | 0                | 0                     |
| 21003004       | Lily Blouse Orange.L                   | 0            | 0              | 0                | 0                     | 35           | 1,260          | 0                | 0                     |
| 21003005       | Lily Blouse Orange.XL                  | 0            | 0              | 0                | 0                     | 15           | 540            | 0                | 0                     |
| 21003006       | Lily Blouse Orange.XXL                 | 0            | 0              | 0                | 0                     | 10           | 360            | 0                | 0                     |
| 21007002       | Lily Blouse Red.S                      | 0            | 0              | 0                | 0                     | 20           | 720            | 0                | 0                     |
| 21007003       | Lily Blouse Red.M                      | 0            | 0              | 0                | 0                     | 30           | 1,080          | 0                | 0                     |
| 21007004       | Lily Blouse Red.L                      | 0            | 0              | 0                | 0                     | 40           | 1,440          | 0                | 0                     |
| 21007005       | Lily Blouse Red.XL                     | 0            | 0              | 0                | 0                     | 30           | 1,080          | 0                | 0                     |
| 21007006       | Lily Blouse Red.XXL                    | 0            | 0              | 0                | 0                     | 20           | 720            | 0                | 0                     |
| 21009001       | Lily Blouse Black.XS                   | 0            | 0              | 0                | 0                     | 1            | 36             | 0                | 0                     |
| 21009002       | Lily Blouse Black.S                    | 0            | 0              | 0                | 0                     | 62           | 2,231          | 0                | 0                     |
| 21009003       | Lily Blouse Black.M                    | 0            | 0              | 0                | 0                     | 98           | 3,527          | 0                | 0                     |
| 21009004       | Lily Blouse Black.L                    | 0            | 0              | 0                | 0                     | 108          | 3,887          | 0                | 0                     |
| 21009005       | Lily Blouse Black.XL                   | 0            | 0              | 0                | 0                     | 99           | 3,547          | 0                | 0                     |
| 21009006       | Lily Blouse Black.XXL                  | 0            | 0              | 0                | 0                     | 57           | 2,051          | 0                | 0                     |
| 21009007       | Lily 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**:

The screenshot shows a search bar at the top with a magnifying glass icon. Below it is a list of metrics. A red circle with the number '2' is next to 'GM' under the 'Budget GM' category. A red circle with the number '1' is next to a group of metrics under the 'Volume' category, including 'CO2 (Kilogram)', 'Energy kWh', and 'Water (Liters)'.

1. These are the Descriptions of the [Sustainability VarDim Types 1 - 4](#).
2. **GM** stands for Gross Margin.

## 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 into **Group By 2**, and again within each **Group By 2** it will sort into **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  | <input type="checkbox"/> | <input type="checkbox"/>       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | -CY                | CY               | Quantity | Amount GBP | Cost GBP | GM       |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Last Year    | <input type="checkbox"/> | <input type="checkbox"/>       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | -CY-1Y             | CY-1Y            | Quantity | Amount GBP | Cost GBP | GM       |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |

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 run the <b>Extended Sales Statistics</b> report on which the <b>Setup No.</b> will be filled in already.                                                                                                                              |
| Excel List      | Will show the Data Series Label, <b>Group By 3</b> , <b>Group By 2</b> , <b>Group By 1</b> , <b>Detailed By</b> , Description of <b>Detailed By</b> and the values of all the possible topics that can be chosen for the <b>Columns 1 – 4</b> . |
| Excel Formatted | Will show the <b>Group By 3</b> , <b>Group By 2</b> , <b>Group By 1</b> , <b>Detailed By</b> , Description of <b>Detailed By</b> and the values for the <b>Columns 1 – 4</b> 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 <sup>*)</sup> | Will send a pdf-file of the report based on the default <b>E-Mail Template</b> for Report <b>6036850 Extended Sales Statistics</b>                                                                |
| Chart                | It can only be chosen if you have also installed one of TRIMIT e-commerce. In that case, it will open a webpage and show the outcome as a Chart, based on the settings in FastTab <b>Charts</b> . |
| Gauge                | It can only be chosen if you have also installed one of TRIMIT e-commerce. In that case, it will open a webpage and show the outcome as a Gauge, based on the settings in FastTab <b>Gauge</b> .  |

<sup>\*)</sup> 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 to see if the current **Setup No.** should also be available to choose from for one of TRIMIT e-commerce sites.

## 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 in **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/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 |
|--------------|--------------------|--------------------------------|-----------------------------|---------------------------------|--------------------|------------------|----------|------------|--------------|---------------|---------------------|-----------------|---------|-----------------|
| →            |                    |                                |                             |                                 |                    |                  | Quantity | Amount GBP | Discount GBP | Budget Amount |                     |                 |         |                 |
|              |                    |                                |                             |                                 |                    |                  |          |            |              |               |                     |                 |         |                 |
|              |                    |                                |                             |                                 |                    |                  |          |            |              |               |                     |                 |         |                 |

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

Extended Sales Statistics Setup

TEST2

Home Reports Automate Fewer options

Statistics Print E-Mail Show Chart Show Gauge Excel Formatted Excel 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 Line Delete Line Setup/Filter

| Series Label | Incl. Sales Orders | Incl. Import Lines (WWW) | Incl. Posted Sales Invo... | Incl. Credit Memo... | 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 Series 1 Current Day

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

Print E-Mail Show Chart Show Gauge Excel Formatted Show 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 Series 1 Current Day

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

Print E-Mail Excel Formatted Show 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  |                    |                                     |                             |                                     |                                        |            |          |                    |                  |          |            |              |               |                     |                 |                          |                          |  |  |  |  |
|--------------|--------------------|-------------------------------------|-----------------------------|-------------------------------------|----------------------------------------|------------|----------|--------------------|------------------|----------|------------|--------------|---------------|---------------------|-----------------|--------------------------|--------------------------|--|--|--|--|
| 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  |                    | <input checked="" type="checkbox"/> | <input type="checkbox"/>    | <input checked="" type="checkbox"/> | <input type="checkbox"/>               |            |          | -CY-1Y             | CY-1Y            | Quantity | Amount GBP | Discount GBP | Budget Amount |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |  |  |  |  |
| This Year    |                    | <input checked="" type="checkbox"/> | <input type="checkbox"/>    | <input checked="" type="checkbox"/> | <input type="checkbox"/>               |            |          | -CY                | CY               | Quantity | Amount GBP | Discount GBP | Budget Amount |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |  |  |  |  |

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 of 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 TRIMIT e-commerce and from the TRIMIT Integration (via External API) included in your Statistics, set a check mark here.

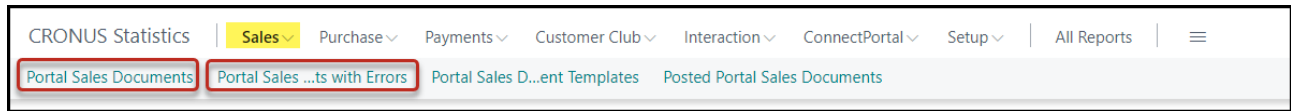
For TRIMIT e-commerce, you can see these Lines (Documents) in the **Portal Sales Documents** and **Portal Sales Documents with Errors**:

In the TRIMIT Small Business Role Center:

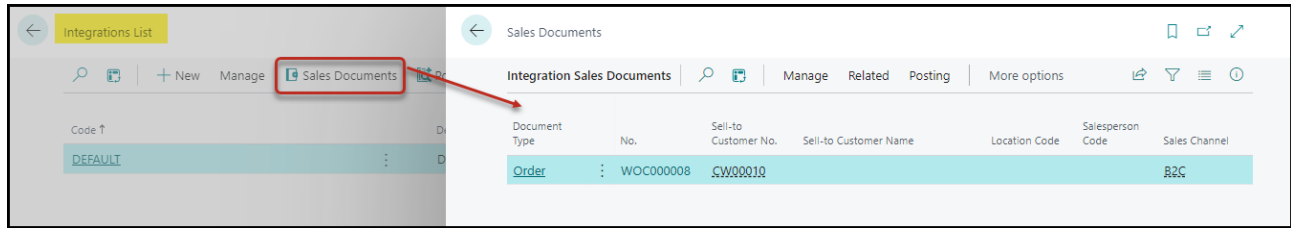
|                   |                     |                        |                                |                                 |                                |           |            |         |                  |             |  |
|-------------------|---------------------|------------------------|--------------------------------|-----------------------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

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

I.e., a Complaint with **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:

| <div> <div>Print</div> <div>E-Mail</div> <div>Show Chart</div> <div>Show Gauge</div> <div>Excel Formatted</div> <div>Show in Analytics</div> <div>More options</div> </div> |                           |          |            |          |     |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|----------|------------|----------|-----|--|
| 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          |
| Cost GBP        | Discount GBP    | Cost            | Cost            |
| Discount GBP    | Amount          | Discount        | Discount        |
| Amount          | Budget Quantity | Budget Quantity | Budget Quantity |
| Cost            | Budget Amount   | Budget Amount   | Budget Cost     |
| Discount        | Budget Cost     | Budget Cost     | GM              |
| Budget Quantity | GM              | GM              | Budget GM       |
| Budget Amount   | Budget GM       | Budget GM       | Net Weight      |
| Budget Cost     | Net Weight      | Net Weight      | Gross Weight    |
| GM              | Gross Weight    | Gross Weight    | Volume          |
| Budget GM       | Volume          | Volume          | CO2 (Kilogram)  |
| Net Weight      | CO2 (Kilogram)  | (C1-C2)         | Energy kWh      |
| Gross Weight    | Energy kWh      | (C1 pct. of C2) | Water (Liters)  |
| Volume          | Water (Liters)  | CO2 (Kilogram)  |                 |
| CO2 (Kilogram)  |                 | Energy kWh      |                 |
| Energy kWh      |                 | Water (Liters)  |                 |
| Water (Liters)  |                 |                 |                 |

Column 1

Column 2

Column 3

Column 4

**GM** stands for *Gross Margin %*. This will be calculated by  $\text{Amount LCY} - \text{Cost LCY} / \text{Amount LCY} * 100$ .

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

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

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 of the **Gauge Value Type**.

### Filters

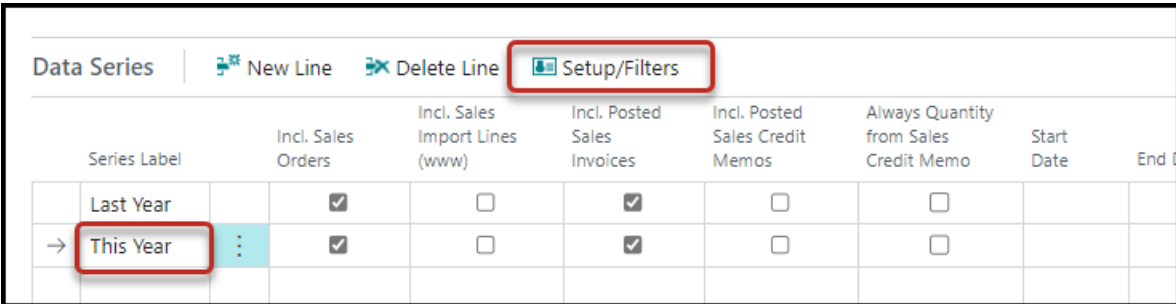
In this field, a check mark will be set by the system automatically if one of the Filters is filled via *Setup/Filters*.

### 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 "=".

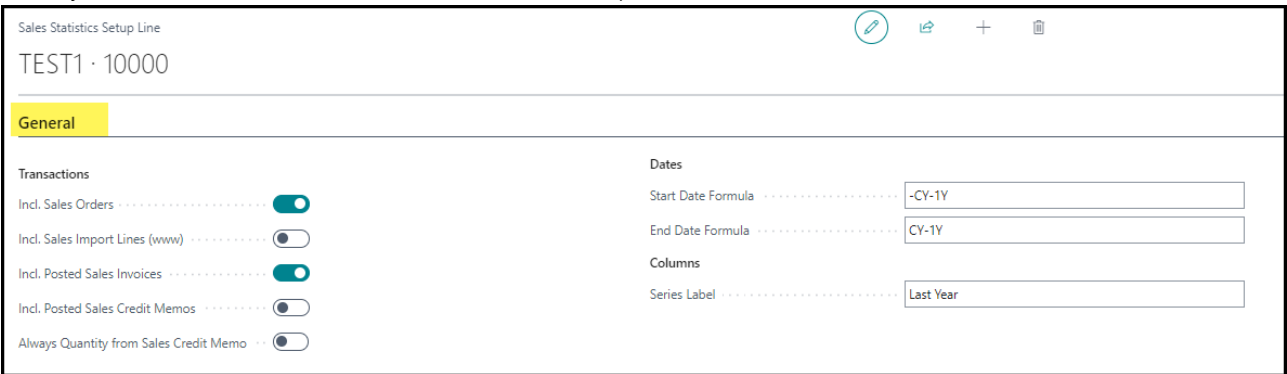
## Data Series, Setup/Filters, FastTab General

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    | <input checked="" type="checkbox"/> | <input type="checkbox"/>       | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          |
| → This Year  | <input checked="" type="checkbox"/> | <input type="checkbox"/>       | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          |

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 on 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 they 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 TRIMIT e-commerce, you can have the Statistics shown as Charts, both on TRIMIT e-commerce 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
Label ToolTip
No. & Name

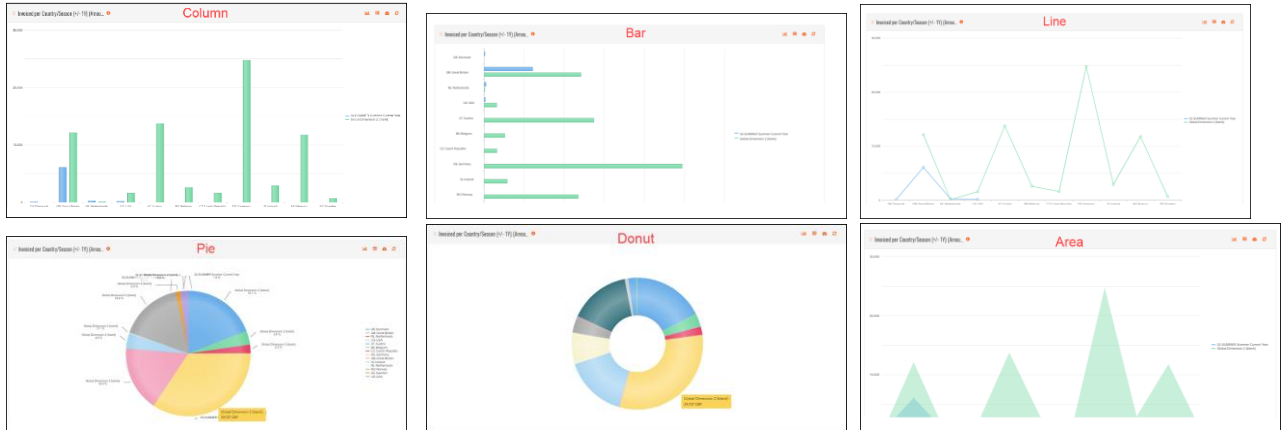
Chart Value
Amount LCY
Dashboard

Stack
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 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)* depend 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 e-commerce Dashboard. You can choose either *No.*, *Name* or both *No. & Name*.

Therefore, if **Detailed By** is *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 TRIMIT e-commerce, 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 e-commerce, you can have the Statistics shown as Gauge, both on TRIMIT e-commerce 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.

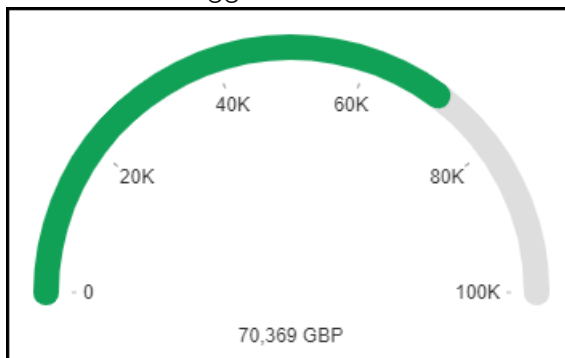
## Threshold 2

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

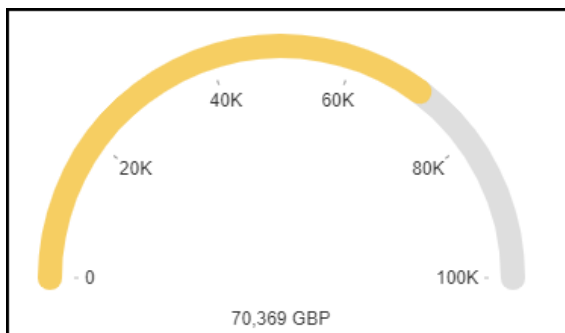
## Range style

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

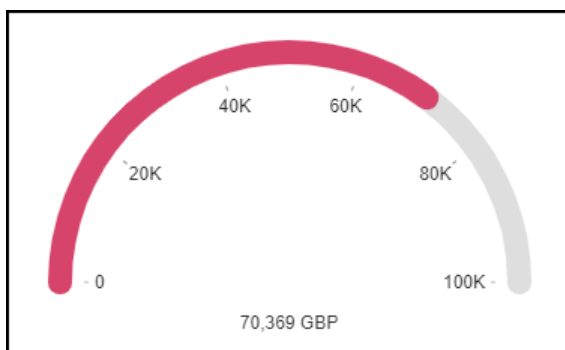
*Unfavorable -> Favorable* will show the Gauge from **Min. Value** to **Max. Value** where the total Value will show in **Red** if it is smaller than **Threshold 1**, in **Orange** if it is between **Threshold 1** and **Threshold 2** and in **Green** if it is bigger than **Threshold 2**.



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                         | <input type="checkbox"/> |
| Variant   | SHOE_SURF   | Shoe Surface         | Variant 2                         | <input type="checkbox"/> |
| Variant   | SHOE_SOLE   | ShoeSole Type        | Variant 3                         | <input type="checkbox"/> |
| Variant   | SHOE_WIDTH  | Shoe Width           | Variant 4                         | <input type="checkbox"/> |
| Variant   | SHOE_US     | US Shoe Sizes 5 - 13 | Variant 5                         | <input type="checkbox"/> |

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 of 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 the Sales Statistics correct, 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 ..... <input checked="" type="checkbox"/> |
| Cache ..... <input type="checkbox"/> ... | 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 <b>Statistics Data</b> table.<br>See more about storing of Statistics Data in <a href="#">Statistics Data Query</a> . |

### 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 field, 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 entered/posted 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

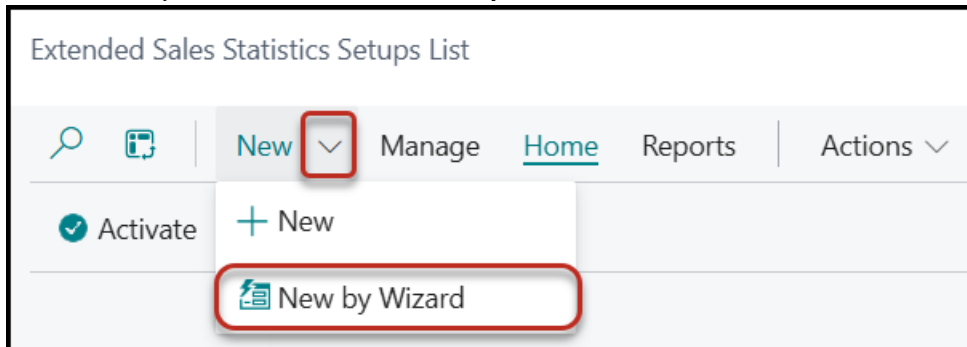
Here you have the possibility to decide whether the first column of the first Data Series line should be shown in Lines or in a Matrix.

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.

# Creating a Setup by using the Wizard

You are also able to create a **Setup No.** by using the Wizard.  
In that case, you need to click *V, New by Wizard*.



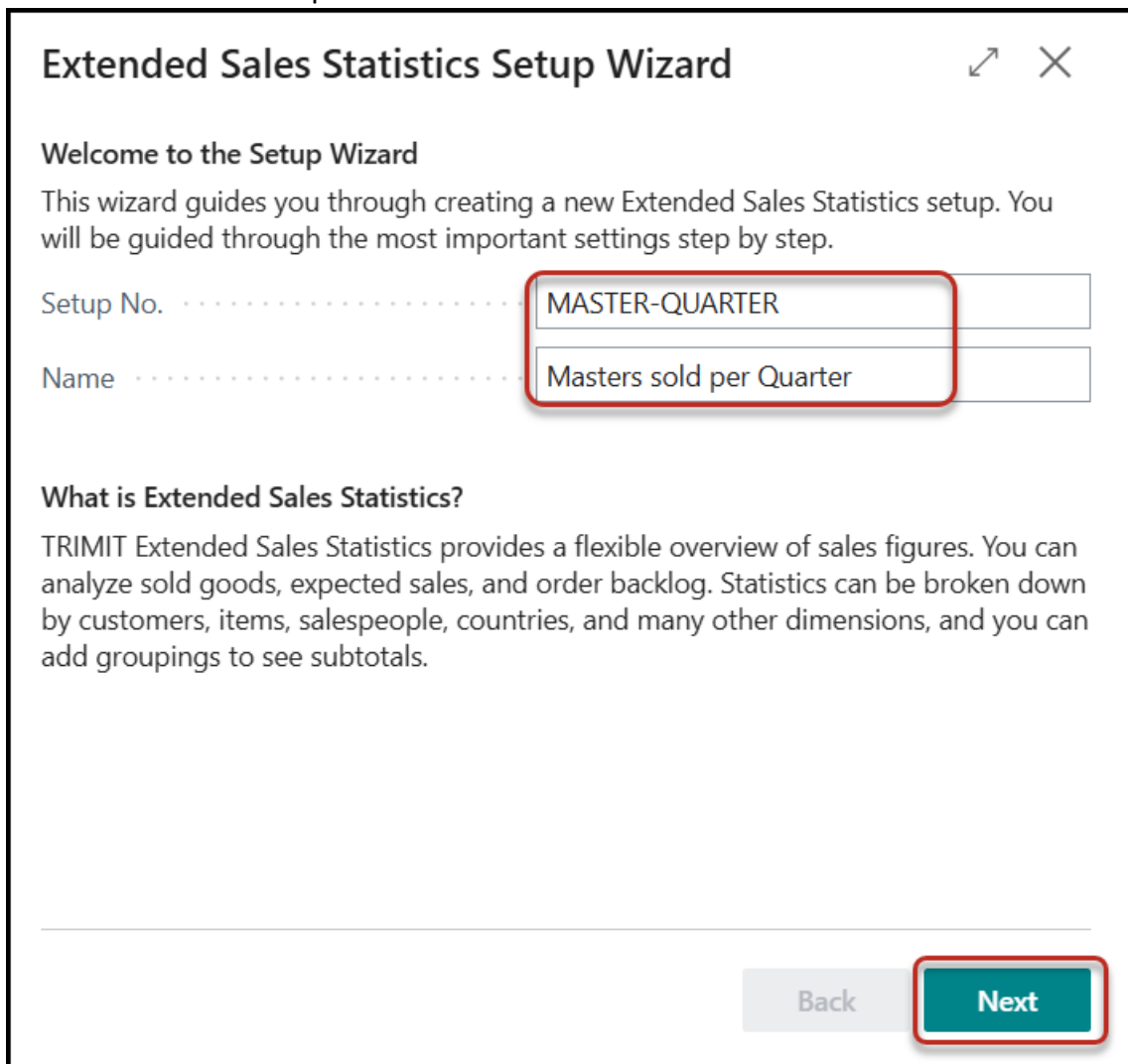
Extended Sales Statistics Setups List

Search | New | Manage | Home | Reports | Actions

Activate + New

New by Wizard

You need to enter a **Setup No.** and a **Name** and then click **Next**:



## Extended Sales Statistics Setup Wizard

Welcome to the Setup Wizard

This wizard guides you through creating a new Extended Sales Statistics setup. You will be guided through the most important settings step by step.

Setup No. MASTER-QUARTER

Name Masters sold per Quarter

### What is Extended Sales Statistics?

TRIMIT Extended Sales Statistics provides a flexible overview of sales figures. You can analyze sold goods, expected sales, and order backlog. Statistics can be broken down by customers, items, salespeople, countries, and many other dimensions, and you can add groupings to see subtotals.

Back Next

You need to choose the [Calculated Value](#) (*Revenue, Order Intake, Order Book*): default = *Revenue* and the [Data Source](#) (*Statistic Data, Real-time*): default = *Statistic Data*, after which you need to click **Next**. Based on your choices, the text will change accordingly.

Extended Sales Statistics Setup Wizard

What do you want to measure?

Choose which type of calculation the statistics should perform. This determines which sales documents are included and how dates are used.

Calculated Value ..... 

Revenue

Revenue

Shows amounts and quantities for goods that have been sold/shipped in a given period.

How does it work?

The system uses Shipment Date for sales orders and Posting Date for invoices/credit memos. Only documents with a date within your data series period are included.

When should you use it?

When you want to answer: "What have we actually sold and delivered in this period?"

Data Source

Choose whether statistics should be calculated on real-time data (directly from sales orders/invoices) or on pre-aggregated statistic data. Statistic data provides better performance but requires data to be refreshed via job queue entries.

Data Source ..... 

Real-time

Real-time Data

Statistics are calculated directly from current sales orders, posted invoices, and credit memos. Data is always 100% up to date.

When should you use it?

When it is important that data is completely current, e.g. for statistics on a specific sales order. Can be slower with large data volumes.

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Next

Extended Sales Statistics Setup Wizard

What do you want to measure?

Choose which type of calculation the statistics should perform. This determines which sales documents are included and how dates are used.

Calculated Value ..... 

Order Intake

Order Intake

Shows new orders received in a given period – i.e. how much new sales have come in.

What is included?

1) Open sales orders where Creation/Order Date falls within the period. 2) Posted invoices and credit memos from closed orders, where the original order's Creation/Order Date fell within the period.

When should you use it?

When you want to answer: "How many new orders have we received in this period?" Note: Whether Creation Date or Order Date is used depends on the "Order Creation Date Statistics" setting in Sales & Receivables Setup.

Data Source

Choose whether statistics should be calculated on real-time data (directly from sales orders/invoices) or on pre-aggregated statistic data. Statistic data provides better performance but requires data to be refreshed via job queue entries.

Data Source ..... 

Statistic Data

Statistic Data (Pre-aggregated)

Statistics are calculated from the "trm Statistics Data" table (table 6036854). This table must be refreshed regularly for data to be accurate.

When should you use it?

Recommended for dashboards, e-commerce, and statistics where 100% real-time data is not critical. Provides better performance than Real-time.

How to keep data updated

Create a Job Queue Entry with: Object Type = Codeunit, Object ID = 6036852, Object Name = "trm Statistics Query Handler". Set it to run e.g. every hour or daily.

Manual refresh

You can also refresh manually from the "Extended Sales Statistics Setups" list via the "Refresh Statistics Data" action. Here you can choose "Only new data" (only new data since last refresh) or "Regenerate all data" (rebuild everything).

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Extended Sales Statistics Setup Wizard

What do you want to measure?

Choose which type of calculation the statistics should perform. This determines which sales documents are included and how dates are used.

Calculated Value ..... 

Order Book

Order Book

The order book shows the total order backlog at a specific point in time – a "snapshot" of all open commitments.

What does this mean in practice?

Imagine asking: "As of March 1st – how many goods do we still owe to deliver?" The order book collects all orders created BEFORE or ON that date, and subtracts what has already been shipped/invoiced AFTER that date.

What is specifically included?

1) Open sales orders and import lines with Creation/Order Date ON or BEFORE the specified date. 2) Posted invoices and credit memos with Posting Date AFTER the specified date – but ONLY if they originate from orders created BEFORE or ON the date. In other words: Orders created within the period, minus what has already been invoiced after the period.

Important for Order Book

Start Date and End Date in the data series MUST be the SAME date. You specify a single point in time – not a range. Example: Set both Start and End Date Formula to "OD" to see the order book as of today, or to "-1M" to see it as of one month ago.

When should you use it?

When you want to answer: "What is the total value of orders we have not yet delivered?" – e.g. for capacity planning, cash flow overview, or as a KPI for outstanding orders.

Data Source

Choose whether statistics should be calculated on real-time data (directly from sales orders/invoices) or on pre-aggregated statistic data. Statistic data provides better performance but requires data to be refreshed via job queue entries.

Data Source ..... 

Real-time

Real-time Data

Statistics are calculated directly from current sales orders, posted invoices, and credit memos. Data is always 100% up to date.

When should you use it?

When it is important that data is completely current, e.g. for statistics on a specific sales order. Can be slower with large data volumes.

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Next

 TRIMIT

WHITE PAPER: EXTENDED SALES STATISTICS

Date: July 20, 2026

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## Extended Sales Statistics Setup Wizard

What should the statistics show, and how should it be grouped?

"Detailed By" determines what each individual line represents (e.g. one line per customer or per master). You can then add up to 3 grouping levels that create subtotals. Leave the Group By fields empty if you do not want groupings.

Detailed By ..... Master ...

### Grouping Levels (optional)

Group By 1 is closest to the details, Group By 3 is the outermost level. The hierarchy becomes: Group By 3 → Group By 2 → Group By 1 → Detailed By.

Group By 1 (innermost level) ..... Collection ...

Group By 2 (middle level) ..... Quarter ...

Group By 3 (outermost level) ..... ...

Hierarchy ..... >> Quarter  
                                    >>> Collection  
                                    >>>> Master

It is your responsibility to ensure the setup is logically sound. E.g. it does not make sense to have Detailed By = Master and Group By 1 = Item, because an item belongs under a master (not the other way around). Typical pattern: Detailed → Grouping = Specific → General.

Next

## Extended Sales Statistics Setup Wizard

**Data Series 1 – Period and Documents**

Specify which documents and which time period the first data series should cover. A data series defines one set of figures in the statistics (e.g. "this year"). You can add a comparison series later.

Series Label ..... Series 1

**Period**

Use date formulas to define dynamic periods. Abbreviations: D = Day, W = Week, M = Month, Q = Quarter, Y = Year. Prefix: C = Current. Examples: -CY = start of current year, CY = end of current year, -CM = start of current month, -1Y = 1 year back, 0D = today.

Start Date Formula ..... -CY-2Y

End Date Formula ..... CY

|                                 |                                     |
|---------------------------------|-------------------------------------|
| Incl. Sales Orders              | <input checked="" type="checkbox"/> |
| Incl. Posted Sales Invoices     | <input checked="" type="checkbox"/> |
| Incl. Posted Sales Credit Memos | <input checked="" type="checkbox"/> |
| Incl. Sales Import Lines (www)  | <input type="checkbox"/>            |

Next

## Extended Sales Statistics Setup Wizard

↗ ✕

### Data Series 1 – Which values do you want to see?

Select up to 2 columns to display in the statistics. Default values are: Quantity, Amount (LCY), Discount (LCY), and Budget. You can change them as needed.

| Columns  |               |
|----------|---------------|
| Column 1 | Quantity      |
| Column 2 | Amount LCY    |
| Column 3 | Discount LCY  |
| Column 4 | Budget Amount |

### About column choices

Most common combinations: 1) Sales analysis: Quantity + Amount LCY + Cost LCY + GM (quantity, amount, cost, margin). 2) Budget comparison: Amount LCY + Budget Amount + (C1-C2) + (C1 pct. of C2). 3) Simple: Quantity + Amount LCY (only quantity and amount). Note: "Amount LCY" and "Cost LCY" are always in local currency. Use "Amount" and "Cost" if you have specified an alternative currency.

Back

Next

**Data Series 1 – Which values do you want to see?**

Select up to 4 columns to display in the statistics. Default values are: Quantity, Amount (LCY), Discount (LCY), and Budget. You can change them as needed.

|          |               |
|----------|---------------|
| Column 1 | Quantity      |
| Column 2 | Amount LCY    |
| Column 3 | Discount LCY  |
| Column 4 | Budget Amount |

Most common combinations: 1) Sales analysis: Quantity + Amount LCY + Cost LCY + GM (quantity, amount, cost, margin). 2) Budget comparison: Amount LCY + Budget Amount + (C1-C2) + (C1 pct. of C2). 3) Simple: Quantity + Amount LCY (only quantity and amount). Note: "Amount LCY" and "Cost LCY" are always in local currency. Use "Amount" and "Cost" if you have specified an alternative currency.

Next

You can set [Filters](#).  
Click **Next**.

Extended Sales Statistics Setup Wizard

Filters (optional)

You can limit the statistics to specific customers, items, salespeople, etc. Leave fields empty to include everything. There are 40+ filters available – here the most common ones are shown. You can add more filters via the full setup after creation. Tip: Use standard BC filter notation, e.g. "10000..20000" for a range, "10000|20000" for specific values.

Customer-related Filters

Filter Sell-to Customer No. ....

Filter Salesperson .....

Filter Country/Region Code .....

Item-related Filters

Filter Item No. ....

Filter Master No. ....

Filter Collection No. ....

Other Filters

Filter Order Type .....

Filter Sales Channel .....

Brand Filter .....

Season Filter .....

Context-driven Filters

If you want statistics that automatically filter based on the current record (e.g. the customer you are viewing), enter "=" as the filter value. E.g. Customer No. Filter = "=" means the statistics will automatically filter on the customer number from the record you run it from.

Back

Next

You can determine if you want another **Data Series** added.  
If so, it will show the questions again for the **Data Series**, but now in 1 page.  
Click **Next**.

Extended Sales Statistics Setup Wizard

Comparison Period (optional)

You can add a second data series for comparison, e.g. last year vs. this year. Filters from Series 1 are inherited automatically to Series 2 unless you set separate filters in the full setup.

Add Comparison Series .....

Back

Next

Extended Sales Statistics Setup Wizard

**Comparison Period (optional)**

You can add a second data series for comparison, e.g. last year vs. this year. Filters from Series 1 are inherited automatically to Series 2 unless you set separate filters in the full setup.

Add Comparison Series ☒

**Data Series 2**

Series Label

Start Date Formula

End Date Formula

Incl. Sales Orders ☒

Incl. Posted Sales Invoices ☒

Incl. Posted Sales Credit Memos ☒

Incl. Sales Import Lines (www) ☐

**Columns for Series 2**

Column 1

Column 2

Column 3

Column 4

Back
Next

You will see a summary and can determine if the Statistics should be **activated** right away.

Extended Sales Statistics Setup Wizard

Summary

Here you can see an overview of your statistics setup. Click Finish to create it.

**General**

Setup No. MASTER-QUARTER

Name Masters sold per Quarter

Calculated Value Order Book

Data Source Real-time

**Levels**

Detailed By Master

**Data Series 1**

Series Label Series 1

Documents Orders, Invoices, Credit Memos

Columns Quantity, Amount LCY, Discount LCY, Budget Amount

**Data Series 2 (Comparison)**

Series Label Series 2

**Final Options**

Activate setup immediately ☐

Open setup after creation ☒

Back
Finish



After clicking **Finish** the Statistics **Setup No.** will be created, after which you can change any content of this created **Setup No.** as described in detail in [Creating a Setup No. Manually](#).

Extended Sales Statistics Setup

MASTER-QUARTER

Home Reports Automate Fewer options

Activate Deactivate

General

Setup No. MASTER-QUARTER Top-down

Name Masters sold per Quarter Top-down Value

Status Deactivated Top-down Number 0

Specification

Calculated Value Revenue

Detailed By Master

Group By 1 Collection

Group By 2 Quarter

Group By 3

Show Others in Total

Page

Explosion Assortment

Drill Down Code

Data Series

| Series Label | Incl. Sales Ord...                  | Incl. Sales Imp... Lines (ww... | Incl. Post... Sales Invo...         | Incl. Post... Sales Credit Me...    | Start Date Formula | End Date Formula | Column 1 | Column 2   | Column 3     | Column 4      | Filter Sales Budget |
|--------------|-------------------------------------|---------------------------------|-------------------------------------|-------------------------------------|--------------------|------------------|----------|------------|--------------|---------------|---------------------|
| → Series 1   | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | -CY-2Y             | CY               | Quantity | Amount GBP | Discount GBP | Budget Amount |                     |
| Series 2     | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | -CY-4Y             | CY-2Y            | Quantity | Amount GBP | Discount GBP | Budget Amount |                     |

You might have to click **Home, Activate** to change the **Status** to **Active**, before you can see the Statistic via **Reports, Statistics**.

Extended Sales Statistics Setup

MASTER\_QUARTER

Home Reports Automate Fewer options

Statistics Print E-Mail Show Chart Show Gauge

General

# Reports Actions

In the *Extended Sales Statistics Setup* Page

In the *Extended Sales Statistics Setups List* Page

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

**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**

| 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    |                    | <input checked="" type="checkbox"/> | <input type="checkbox"/>    | <input checked="" type="checkbox"/> | <input type="checkbox"/>               |            |          | -CY-1Y             | CY-1Y            | Quantity | Amount   | Cost GBP | GM       |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |
| This Year    |                    | <input checked="" type="checkbox"/> | <input type="checkbox"/>    | <input checked="" type="checkbox"/> | <input type="checkbox"/>               |            |          | -CY                | CY               | Quantity | Amount   | Cost GBP | GM       |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |

## 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 DateTime 2/17/2026 9:30 AM Global Filters Intercompany: No Series 1 Last Year - Date: 01/01/24.01/01/25 Series 2 This Year - Date: 01/01/25.01/01/26

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

| Code     | Description                             | Quantity [1] | Amount USD [1] | Cost GBP [1] | GM [1] | Quantity [2] | Amount USD [2] | Cost GBP [2] | GM |
|----------|-----------------------------------------|--------------|----------------|--------------|--------|--------------|----------------|--------------|----|
| DE       | Germany                                 | 11,466       | 1,219,481      | 391,835      | 51     | 1,464        | 119,818        | 45,030       |    |
| 2010     | The Shoe Store Europe DE-80807 Munch... | 6,595        | 525,536        | 186,671      | 45     | 478          | 25,262         | 9,156        |    |
| 2000     | Olivia Trousers                         | 55           | 3,395          | 888          | 60     | 0            | 0              | 0            |    |
| 20002038 | Olivia Trousers Royal Blue.38           | 6            | 342            | 86           | 61     | 0            | 0              | 0            |    |
| 20002044 | Olivia Trousers Royal Blue.44           | 11           | 695            | 182          | 60     | 0            | 0              | 0            |    |
| 20002048 | Olivia Trousers Royal Blue.48           | 12           | 795            | 214          | 59     | 0            | 0              | 0            |    |
| 20002540 | Olivia Trousers Navy.40                 | 5            | 301            | 76           | 61     | 0            | 0              | 0            |    |
| 20002542 | Olivia Trousers Navy.42                 | 21           | 1,262          | 330          | 60     | 0            | 0              | 0            |    |
| 2010     | Amelia Trousers                         | 60           | 3,607          | 1,980        | 15     | 0            | 0              | 0            |    |
| 20109946 | Amelia Trousers Black.46                | 9            | 541            | 297          | 15     | 0            | 0              | 0            |    |
| 20109948 | Amelia Trousers Black.48                | 51           | 3,066          | 1,683        | 15     | 0            | 0              | 0            |    |
| 2020     | Isla Trousers                           | 2,492        | 132,202        | 38,037       | 56     | 140          | 7,426          | 2,140        |    |
| 20206036 | Isla Trousers Black/Green.36            | 213          | 11,162         | 3,191        | 56     | 10           | 524            | 150          |    |
| 20206038 | Isla Trousers Black/Green.38            | 179          | 9,380          | 2,770        | 55     | 10           | 524            | 155          |    |
| 20206040 | Isla Trousers Black/Green.40            | 179          | 9,380          | 2,770        | 55     | 10           | 524            | 155          |    |

Picture Picture (Media)

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.

| Code     | Description                             |
|----------|-----------------------------------------|
| DE       | Germany                                 |
| 2010     | The Shoe Store Europe DE-80807 Munch... |
| 2000     | Olivia Trousers                         |
| 20002038 | Olivia Trousers Royal Blue.38           |
| 20002044 | Olivia Trousers Royal Blue.44           |
| 20002048 | Olivia Trousers Royal Blue.48           |
| 20002540 | Olivia Trousers Navy.40                 |
| 20002542 | Olivia Trousers Navy.42                 |
| 2010     | Amelia Trousers                         |
| 20109946 | Amelia Trousers Black.46                |
| 20109948 | Amelia Trousers Black.48                |
| 2020     | Isla Trousers                           |
| 20206036 | Isla Trousers Black/Green.36            |
| 20206038 | Isla Trousers Black/Green.38            |
| 20206040 | Isla Trousers Black/Green.40            |

Expand All Collapse All What's this?

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

| Code     | Description                             | Quantity [1] | Amount    |
|----------|-----------------------------------------|--------------|-----------|
| DE       | Germany                                 | 11,466       | 1,219,481 |
| 2010     | The Shoe Store Europe DE-80807 Munch... | 6,595        | 525,536   |
| 2000     | Olivia Trousers                         | 55           | 3,395     |
| 20002038 | Olivia Trousers Royal Blue.38           | 6            | 342       |
| 20002044 | Olivia Trousers Royal Blue.44           | 11           | 695       |
| 20002048 | Olivia Trousers Royal Blue.48           | 12           | 795       |
| 20002540 | Olivia Trousers Navy.40                 | 5            | 301       |
| 20002542 | Olivia Trousers Navy.42                 | 21           | 1,262     |
| 2010     | Amelia Trousers                         | 60           | 3,607     |
| 20109946 | Amelia Trousers Black.46                | 9            | 541       |
| 20109948 | Amelia Trousers Black.48                | 51           | 3,066     |
| 2020     | Isla Trousers                           | 2,492        | 132,202   |
| 20206036 | Isla Trousers Black/Green.36            | 213          | 11,162    |
| 20206038 | Isla Trousers Black/Green.38            | 179          | 9,380     |
| 20206040 | Isla Trousers Black/Green.40            | 179          | 9,380     |

Sales Statistics

Request Param. Request No. TEST1 Data Source Real-time Data Source DateTime 2/17/2026 9:30 AM Global Filters Intercompany: No Series 1 Last Year - Date: 01/01/24.01/01/25 Series 2 This Year - Date: 01/01/25.01/01/26

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

From this page, you can continue to use the other outputs of the Statistics.

When clicking *Show in Analytics*, the Statistics will be shown as [Sales Analytics](#) page from where you can go in more detail.

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  | <input checked="" type="checkbox"/> | <input type="checkbox"/>       | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          | -CY-1Y             | CY-1Y            | Quar   |
| This Year    | <input checked="" type="checkbox"/> | <input type="checkbox"/>       | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          | -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  
Filter Sell-to Group  
Filter Sell-to Type  
Filter Statistics Group

Item Related

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

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: Real-time

Data Source DateTime: 2/17/2026 9:40 AM

Global Filters: Country/Region Code: DEJUS, Intercomp...

Series 1: Last Year - Date: 01/01/24..01/01/25

Series 2: This Year - Date: 01/01/25..01/01/26

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

| Code     | Description                             | Quantity [1] | Amount USD [1] | Cost GBP [1] | GM [1] | Quantity [2] | Amount USD [2] | Cost GBP [2] | GM [2] |
|----------|-----------------------------------------|--------------|----------------|--------------|--------|--------------|----------------|--------------|--------|
| DE       | Germany                                 | 3,223        | 170,854        | 49,280       | 56     | 280          | 14,855         | 4,277        | 56     |
| 2010     | The Shoe Store Europe DE-80807 Munch... | 2,492        | 132,202        | 38,037       | 56     | 140          | 7,426          | 2,140        | 56     |
| 2020     | Isla Trousers                           | 2,492        | 132,202        | 38,037       | 56     | 140          | 7,426          | 2,140        | 56     |
| 20206036 | Isla Trousers Black/Green,36            | 213          | 11,862         | 3,161        | 56     | 10           | 524            | 150          | 56     |
| 20206038 | Isla Trousers Black/Green,38            | 179          |                |              |        |              | 524            | 155          | 54     |
| 20206040 | Isla Trousers Black/Green,40            | 175          |                |              |        |              | 524            | 162          | 52     |
| 20206042 | Isla Trousers Black/Green,42            | 175          |                |              |        |              | 524            | 167          | 51     |
| 20206044 | Isla Trousers Black/Green,44            | 175          |                |              |        |              | 539            | 175          | 50     |
| 20206046 | Isla Trousers Black/Green,46            | 175          |                |              |        |              | 539            | 180          | 49     |
| 20206048 | Isla Trousers Black/Green,48            | 175          |                |              |        |              | 539            | 81           | 77     |
| 20209036 | Isla Trousers Black/Grey,36             | 175          | 9,170          | 2,622        | 56     | 10           | 524            | 150          | 56     |
| 20209038 | Isla Trousers Black/Grey,38             | 175          | 9,170          | 2,708        | 55     | 10           | 524            | 155          | 54     |
| 20209040 | Isla Trousers Black/Grey,40             | 175          | 9,170          | 2,839        | 52     | 10           | 524            | 162          | 52     |
| 20209042 | Isla Trousers Black/Grey,42             | 175          | 9,170          | 2,925        | 51     | 10           | 524            | 167          | 51     |
| 20209044 | Isla Trousers Black/Grey,44             | 175          | 9,440          | 3,056        | 50     | 10           | 539            | 175          | 50     |
| 20209046 | Isla Trousers Black/Grey,46             | 175          | 9,440          | 3,142        | 49     | 10           | 539            | 180          | 49     |
| 20209048 | Isla Trousers Black/Grey,48             | 175          | 9,440          | 1,411        | 77     | 10           | 539            | 81           | 77     |
| 2020     | Sportswear A/S DE-80807 Munchen         | 568          | 30,111         | 8,689        | 56     | 140          | 7,429          | 2,137        | 56     |
| 2020     | Isla Trousers                           | 568          | 30,111         | 8,689        | 56     | 140          | 7,429          | 2,137        | 56     |
| 20206036 | Isla Trousers Black/Green,36            | 4            | 210            | 60           | 56     | 0            | 0              | 0            | 0      |
| 20206038 | Isla Trousers Black/Green,38            | 33           | 1,729          | 511          | 55     | 0            | 0              | 0            | 0      |

Filters:

Country/Region Code: DEJUS

Intercompany: No

Master No.: 2020

OK

Picture

Picture (Media)

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, but you cannot change the options on FastTabs *Specification*, *Series 1*, and *Series 2* anymore, but you can change the Filters.

See more details in the chapter [Extended Sales Statistics Report](#).

## Request

With the page action *Request*, you can print the Statistics. When you click the action *Request*, you will go to the **Extended Sales Statistics** report where all fields are filled based on the **Setup No.** you come from. You can change all these settings, and do not need to choose a specific **Setup No.**

If you do, however, fill in **Setup No.** then the settings of this **Setup No.** will apply.

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 them 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 TRIMIT e-commerce.

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 TRIMIT e-commerce.

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.

| ITEM STATISTICS |         |                      |                                        |        |               |          |                              |                                |          |          |      |                                |          |        |        |      |     |    |
|-----------------|---------|----------------------|----------------------------------------|--------|---------------|----------|------------------------------|--------------------------------|----------|----------|------|--------------------------------|----------|--------|--------|------|-----|----|
| Date 02/17/26   |         |                      |                                        |        |               |          |                              |                                |          |          |      |                                |          |        |        |      |     |    |
|                 |         |                      |                                        |        |               |          |                              |                                |          |          |      |                                |          |        |        |      |     |    |
| Country/Region  | Text    | Sell-to Customer No. | Text                                   | Master | Text          | Item     | Text                         | Last Year - 01/01/24..01/01/25 |          |          |      | This Year - 01/01/25..01/01/26 |          |        |        |      |     |    |
|                 |         |                      |                                        |        |               |          | Quantity                     | Amount                         | USD      | Cost     | GBP  | GM                             | Quantity | Amount | USD    | Cost | GBP | GM |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206036 | Isla Trousers Black/Green,36 | 213                            | 11161,76 | 3190,74  | 55,9 |                                | 10       | 524,03 | 149,8  | 55,9 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206038 | Isla Trousers Black/Green,38 | 179                            | 9380,08  | 2770,025 | 54,5 |                                | 10       | 524,03 | 154,75 | 54,5 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206040 | Isla Trousers Black/Green,40 | 175                            | 9170,47  | 2838,5   | 52,3 |                                | 10       | 524,03 | 162,2  | 52,3 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206042 | Isla Trousers Black/Green,42 | 175                            | 9170,47  | 2925,125 | 50,8 |                                | 10       | 524,03 | 167,15 | 50,8 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206044 | Isla Trousers Black/Green,44 | 175                            | 9440,2   | 3055,5   | 50,1 |                                | 10       | 539,44 | 174,6  | 50,1 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206046 | Isla Trousers Black/Green,46 | 175                            | 9440,2   | 3142,125 | 48,7 |                                | 10       | 539,44 | 179,55 | 48,7 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20206048 | Isla Trousers Black/Green,48 | 175                            | 9440,2   | 1410,5   | 77   |                                | 10       | 539,44 | 80,6   | 77   |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209036 | Isla Trousers Black/Grey,36  | 175                            | 9170,47  | 2621,5   | 55,9 |                                | 10       | 524,03 | 149,8  | 55,9 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209038 | Isla Trousers Black/Grey,38  | 175                            | 9170,47  | 2708,125 | 54,5 |                                | 10       | 524,03 | 154,75 | 54,5 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209040 | Isla Trousers Black/Grey,40  | 175                            | 9170,47  | 2838,5   | 52,3 |                                | 10       | 524,03 | 162,2  | 52,3 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209042 | Isla Trousers Black/Grey,42  | 175                            | 9170,47  | 2925,125 | 50,8 |                                | 10       | 524,03 | 167,15 | 50,8 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209044 | Isla Trousers Black/Grey,44  | 175                            | 9440,2   | 3055,5   | 50,1 |                                | 10       | 539,44 | 174,6  | 50,1 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209046 | Isla Trousers Black/Grey,46  | 175                            | 9440,2   | 3142,125 | 48,7 |                                | 10       | 539,44 | 179,55 | 48,7 |     |    |
| DE              | Germany | 2010                 | The Shoe Store Europe DE-80807 Munchen | 2020   | Isla Trousers | 20209048 | Isla Trousers Black/Grey,48  | 175                            | 9440,2   | 1410,5   | 77   |                                | 10       | 539,44 | 80,6   | 77   |     |    |
| DE              | Germany | 2020                 | Sportswear A/S DE-80807 Munchen        | 2020   | Isla Trousers | 20206036 | Isla Trousers Black/Green,36 | 4                              | 209,61   | 59,92    | 55,9 |                                | 0        | 0      | 0      | 0    |     |    |
| DE              | Germany | 2020                 | Sportswear A/S DE-80807 Munchen        | 2020   | Isla Trousers | 20206038 | Isla Trousers Black/Green,38 | 33                             | 1729,29  | 510,675  | 54,5 |                                | 0        | 0      | 0      | 0    |     |    |
| DE              | Germany | 2020                 | Sportswear A/S DE-80807 Munchen        | 2020   | Isla Trousers | 20206040 | Isla Trousers Black/Green,40 | 6                              | 314,42   | 100,70   | 52,3 |                                | 0        | 0      | 0      | 0    |     |    |

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.

| ITEM STATISTICS                |                |      |                                        |      |               |          |                              |          |        |         |      |          |     |          |         |      |          |     |             |               |     |             |       |            |              |        |   |
|--------------------------------|----------------|------|----------------------------------------|------|---------------|----------|------------------------------|----------|--------|---------|------|----------|-----|----------|---------|------|----------|-----|-------------|---------------|-----|-------------|-------|------------|--------------|--------|---|
| Date 02/17/26                  |                |      |                                        |      |               |          |                              |          |        |         |      |          |     |          |         |      |          |     |             |               |     |             |       |            |              |        |   |
| Series                         | Country/Region | Text | Sell-to Customer No.                   | Text | Master Text   | Item     | Text                         | Quantity | Amount | GBP     | Cost | Discount | GBP | Amount   | USD     | Cost | Discount | USD | Budget Qty. | Budget Amount | USD | Budget Cost | USD   | Net Weight | Gross Weight | Volume |   |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206036 | Isla Trousers Black/Green,36 | 213      | 742    | 3190,74 | 0    | 0        | 0   | 11891,76 | 4697,74 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 148,1 | 170,4      | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206038 | Isla Trousers Black/Green,38 | 10       | 340    | 149,8   | 0    | 0        | 0   | 524,03   | 230,88  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206038 | Isla Trousers Black/Green,38 | 179      | 6086   | 2770,03 | 0    | 0        | 0   | 9380,08  | 4269,27 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 125,3 | 143,2      | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206040 | Isla Trousers Black/Green,40 | 10       | 340    | 154,75  | 0    | 0        | 0   | 524,03   | 238,51  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206040 | Isla Trousers Black/Green,40 | 175      | 5950   | 2838,5  | 0    | 0        | 0   | 9170,47  | 4374,88 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206042 | Isla Trousers Black/Green,42 | 10       | 340    | 162,2   | 0    | 0        | 0   | 524,03   | 245,99  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206042 | Isla Trousers Black/Green,42 | 175      | 5950   | 2925,13 | 0    | 0        | 0   | 9170,47  | 4508,35 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206044 | Isla Trousers Black/Green,44 | 10       | 340    | 167,15  | 0    | 0        | 0   | 524,03   | 257,62  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206044 | Isla Trousers Black/Green,44 | 175      | 6125   | 3055,5  | 0    | 0        | 0   | 9440,2   | 4709,25 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206046 | Isla Trousers Black/Green,46 | 10       | 350    | 174,6   | 0    | 0        | 0   | 539,44   | 269,1   | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206046 | Isla Trousers Black/Green,46 | 175      | 6125   | 3142,13 | 0    | 0        | 0   | 9440,2   | 4842,63 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206048 | Isla Trousers Black/Green,48 | 10       | 350    | 179,55  | 0    | 0        | 0   | 539,44   | 276,73  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20206048 | Isla Trousers Black/Green,48 | 175      | 6125   | 1410,5  | 0    | 0        | 0   | 9440,2   | 2173,96 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20209036 | Isla Trousers Black/Grey,36  | 10       | 340    | 167,15  | 0    | 0        | 0   | 524,03   | 257,62  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20209036 | Isla Trousers Black/Grey,36  | 175      | 5950   | 2621,5  | 0    | 0        | 0   | 9170,47  | 4040,4  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 0 |
| This Year - 01/01/25..01/01/26 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20209038 | Isla Trousers Black/Grey,38  | 10       | 340    | 149,8   | 0    | 0        | 0   | 524,03   | 230,88  | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 7     | 8          | 0            | 0      | 0 |
| Last Year - 01/01/24..01/01/25 | Germany        | 2010 | The Shoe Store Europe DE-80807 Munchen | 2020 | Isla Trousers | 20209040 | Isla Trousers Black/Grey,40  | 175      | 5950   | 2708,13 | 0    | 0        | 0   | 9170,47  | 4173,87 | 0    | 0        | 0   | 0           | 0             | 0   | 0           | 122,5 | 140        | 0            | 0      | 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, the **Budget Amount** and **Budget Cost** will also be exported in this Currency.

# How to use Extended Sales Statistics Setup Nos.

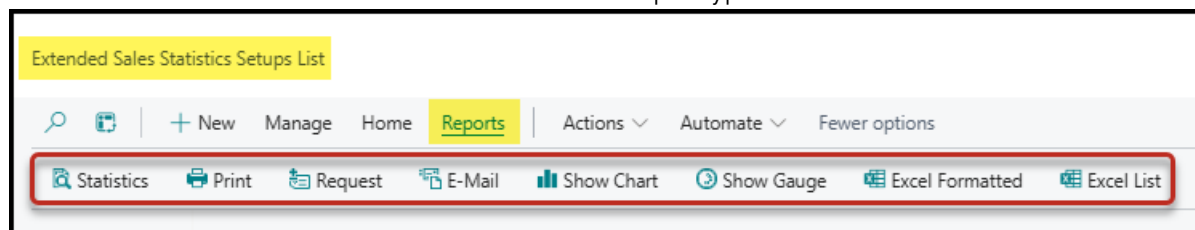
There are four ways of using the **Sales Statistics Setup Nos.**:

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

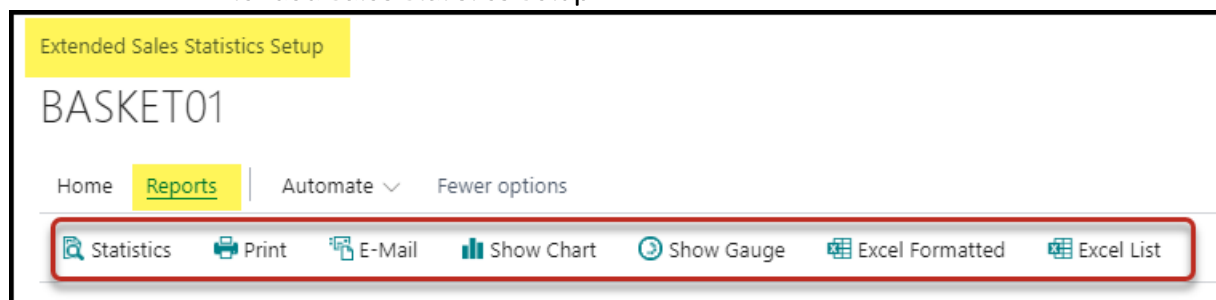
## Via Extended Sales Statistics Setup

In the **Extended Sales Statistics Setup List**, you can click one of the actions [Statistics](#), [Print](#), [Request](#), [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.

If you leave the **Setup No.** blank, you can enter the specifications for the Statistics you want to print.

## In a Statistics Overview

This is only applicable if your system includes one of TRIMIT e-commerce.

In a **Statistics Overview**, you can combine several **Extended Sales Statistics Setup Nos.** to see them in a single view on a web 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 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 to 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 with the Sales Order Card, but in that case, it should be with **Use Record Main**.

Edit - Edit Page Actions

Search
New
Edit List
Delete

| Default Collapse | Type                     | No. / Link       | Name       | Use Record                             | Only Current Company | Company Name |
|------------------|--------------------------|------------------|------------|----------------------------------------|----------------------|--------------|
| →                | <input type="checkbox"/> | Sales Statistics | CUSTOMEREX | Expected Revenue per Customer (+/- 6M) | Main                 |              |

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

Sales Orders: All
New
Delete
Home
Release
Post...
Print/Send
Order
More options

| No. ↑  | Sell-to Customer No. | Sell-to Customer Name | External Document No. | Sales Channel | Order Type | Collection No. | Location |
|--------|----------------------|-----------------------|-----------------------|---------------|------------|----------------|----------|
| 101001 | 10000                | Adatum Corporation    |                       |               |            |                |          |
| 101002 | 10000                | Adatum Corporation    |                       |               |            |                |          |
| 101003 | 30000                | School of Fine Art    |                       |               |            |                |          |
| 101004 | 40000                | Alpine Ski House      |                       |               |            |                |          |
| S0001  | 2000                 | The Fashion Store UK  |                       |               |            |                | BLUE     |
| S0002  | 3000                 | The Furniture Shop UK |                       |               |            |                | BLUE     |
| S0003  | 10000                | Adatum Corporation    |                       |               |            |                | BLUE     |
| S0004  | 2000                 | The Fashion Store UK  |                       |               |            |                | BLUE     |
| S0005  | 10000                | Adatum Corporation    |                       |               |            |                | BLUE     |
| S0006  | 2000                 | The Fashion Store UK  |                       |               |            |                | BLUE     |
| S0007  | 10000                | Adatum Corporation    |                       |               |            |                | BLUE     |
| S0008  | 2000                 | The Fashion Store UK  |                       |               |            |                | BLUE     |

Details
Attachments (0)

Drag & Drop

Drag & Drop files/pictures to this area to upload

Page Actions

Name

Expected Revenue per Customer (+/- 6M)

Sales Statistics
Saved

Request Param.

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

Data Source Real-time
Series 1 - Date: 07/01/23..10/01/23

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

Edit - Edit Page Actions

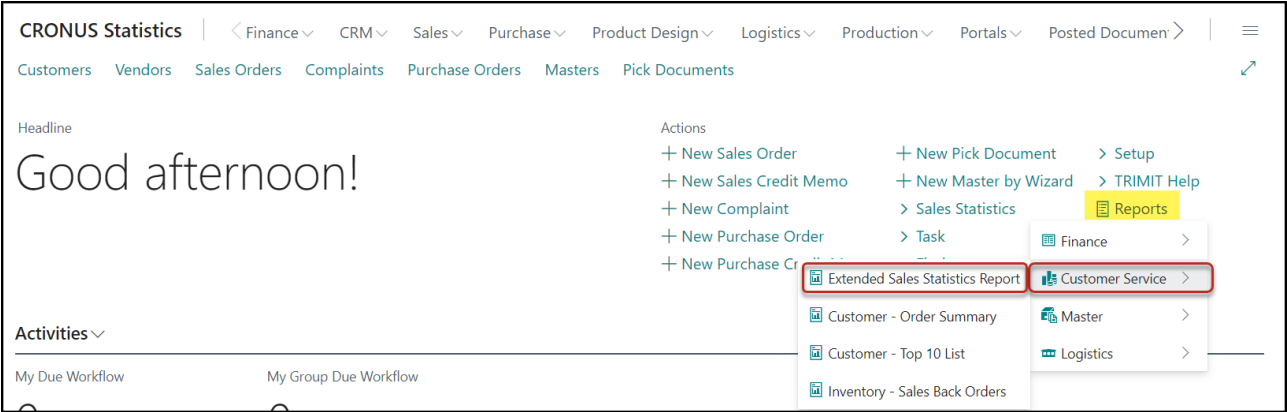
Search
New
Edit List
Delete

| Default Collapse | Type                     | No. / Link          | Name            | Use Record                             | Only Current Company | Company Name |
|------------------|--------------------------|---------------------|-----------------|----------------------------------------|----------------------|--------------|
| →                | <input type="checkbox"/> | Sales Statistics    | CUSTOMEREX      | Expected Revenue per Customer (+/- 6M) | Yes                  |              |
|                  | <input type="checkbox"/> | Statistics Overview | TEST_OVERVIEW_1 | Overview_1                             | Yes                  |              |

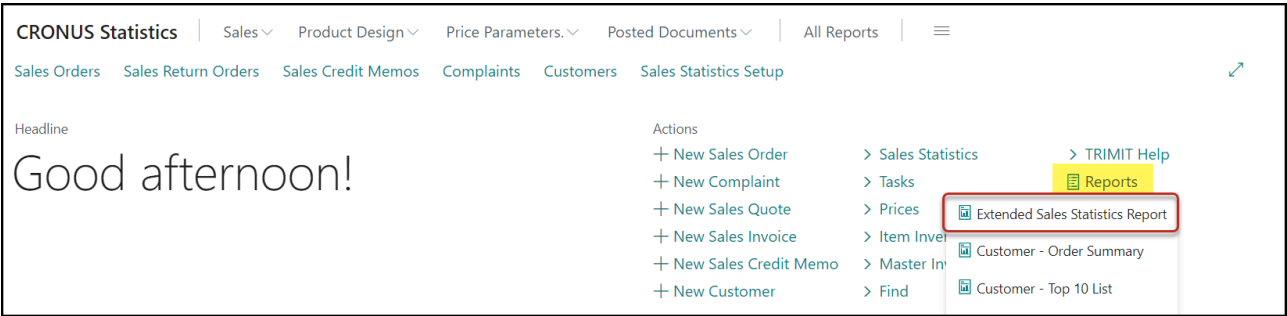
But it might still give you a Statistics not only based on the Sales Order, because you did not set the **Filters** in the individual **Extended Sales Statistics Setup Nos.**

# Extended Sales Statistics Report

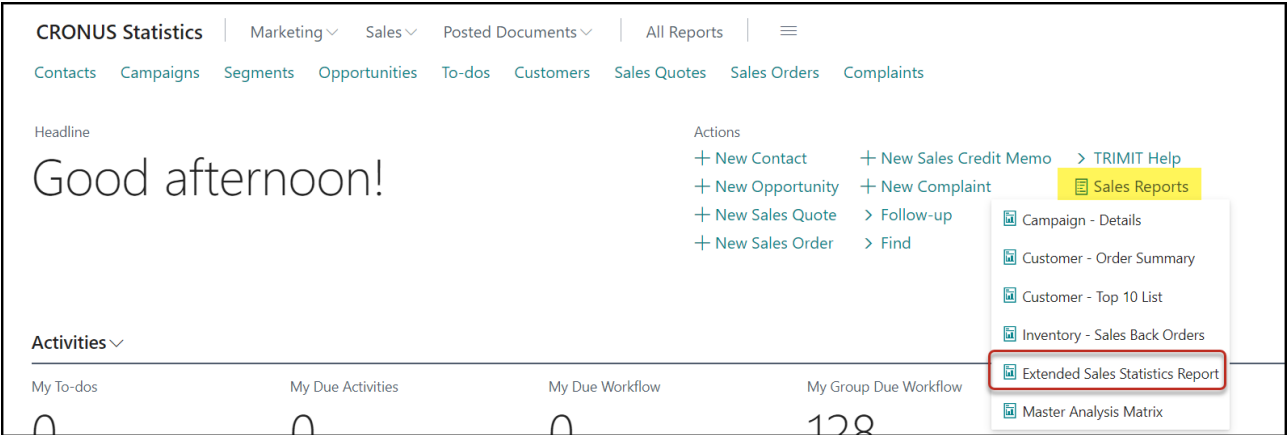
The **Extended Sales Statistics** report can be found via several options:  
In the **TRIMIT Small Business Role Center**, you can start it via:



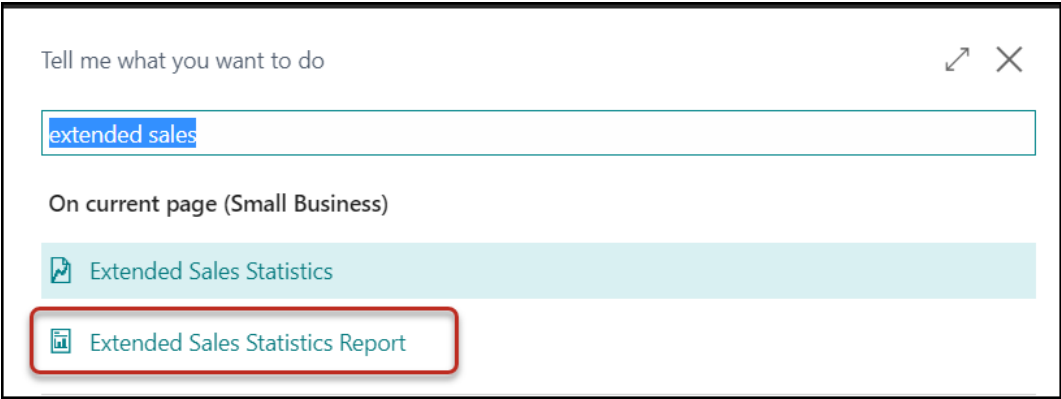
In the **TRIMIT Customer Service Role Center**, you start it via:



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



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



In the **Extended Sales Statistics** report, you can set up 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](#) or [Request](#) in a **Setup No.**. In that case the setup fields are automatically filled in 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 report 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.**

If you leave this field blank, you are able to fill in all the specifications of the report you want to see manually.

### 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 field 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

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

### 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 field 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       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          | -CM                | CM               | Quantity | Amount GBP | Cost GBP | GM       |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |
| Next Months this year | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          | CM+1D              | CY               | Quantity | Amount GBP | Cost GBP | GM       |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |

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 for 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      | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>    | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          | CD                 | CD               | Amount GBP | Cost GBP | (C1 pct. of C2) | Quantity |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |

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

CRONUS Statistics

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

November 18, 2024

Page 1

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 including 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

...

Show as Lines

Customer

...

Show as Columns

Period

...

Show Value as

Sales Amount

▼

View by

Month

▼

Rounding Factor

None

▼

Show Column Name

☐

**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

...

Customer Filter

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

...

Item Filter

...

Budget Dimension 1 Filter

...

Budget Dimension 2 Filter

...

Budget Dimension 3 Filter

...

Brand 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

Name

Revenue per Customer/Master incl. Budget

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          |
|--------------|-------------------------------------|-------------------------------------|-------------------------------------|---------------------------------|----------------------------------------|------------|----------|--------------------|------------------|----------|------------|----------|--------------------|---------------------|-----------------|--------------------------|--------------------------|
| →            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          | -CY                | CY               | Quantity | Amount GBP | Cost GBP | Budget Amount 2024 |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |
|              | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>        | <input type="checkbox"/>               |            |          |                    |                  |          |            |          |                    |                     |                 | <input type="checkbox"/> | <input type="checkbox"/> |

Sales Statistics

✓ Saved

Request Param.

Request No. ....REV\_CUST\_MASTER\_BUDG

Data Source .....Real-time

Data Source DateTime .....11/18/2024 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

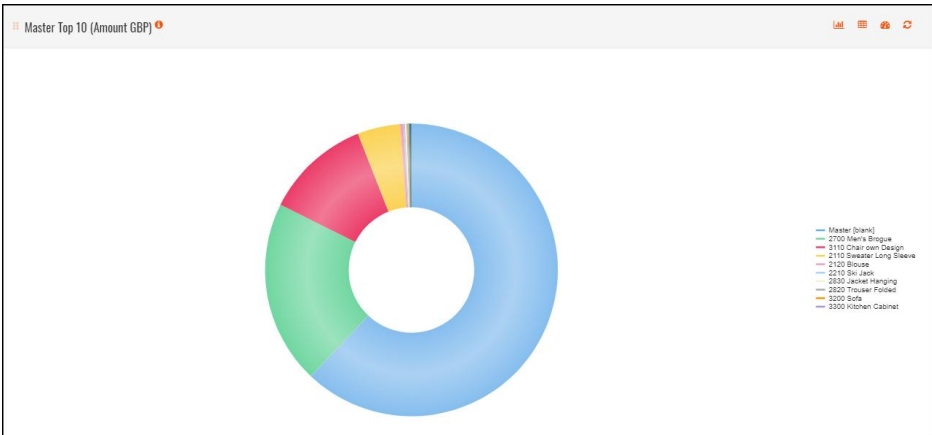
Global Filters Date: 01/01/24..12/31/24, Intercompany: No

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 TRIMIT e-commerce 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 for this year relates to the revenue of last year. Keep in mind that you can only see a Gauge if you have one of TRIMIT e-commerce 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/Filter

| Series Label | Incl. Sales Ord... | Incl. Sales Imp... | Incl. Sales Credit Me... | 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

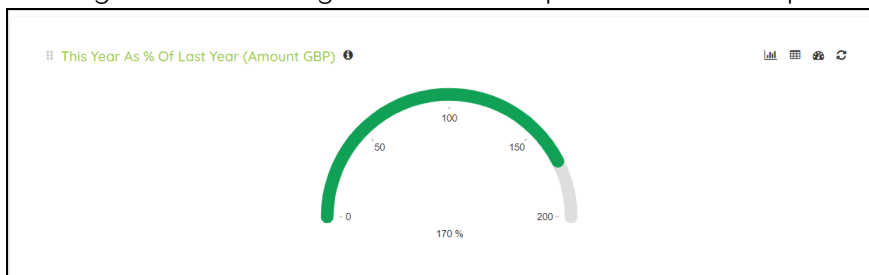
Series 1 .... Last Year - Date: 01/01/19..12/31/19

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

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

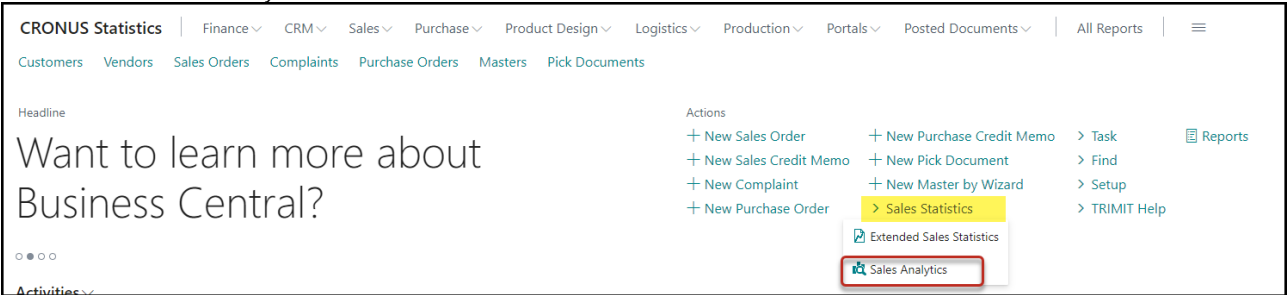
| Code         | Description                            | Quantity [1]  | Amount GBP [1] | Discount GBP [1] | Budget Amount GBP [1] | Quantity [2] | Amount GBP [2] | Discount GBP [2] | Budget Amount GBP [2] |
|--------------|----------------------------------------|---------------|----------------|------------------|-----------------------|--------------|----------------|------------------|-----------------------|
| 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      | Nadisa Balkeren 6137 BD Sittard        | 0             | 0              | 0                | 0                     | 4            | 353            | 0                | 0                     |
| CW00041      | Kim Bisseling 7206 Zutphen             | 0             | 0              | 0                | 0                     | 1            | 59             | 0                | 0                     |
| <b>TOTAL</b> | <b>Total List</b>                      | <b>11,746</b> | <b>524,776</b> | <b>0</b>         | <b>0</b>              | <b>7,627</b> | <b>894,299</b> | <b>109,620</b>   | <b>0</b>              |

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

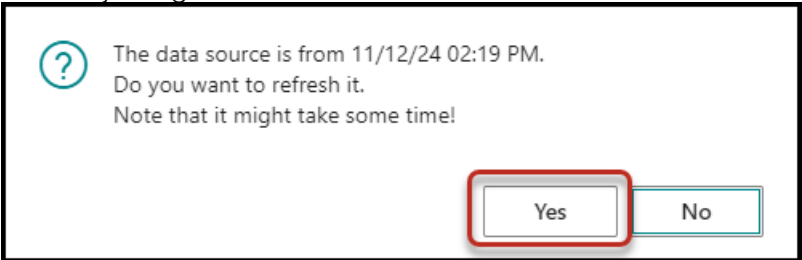


# Sales Analytics

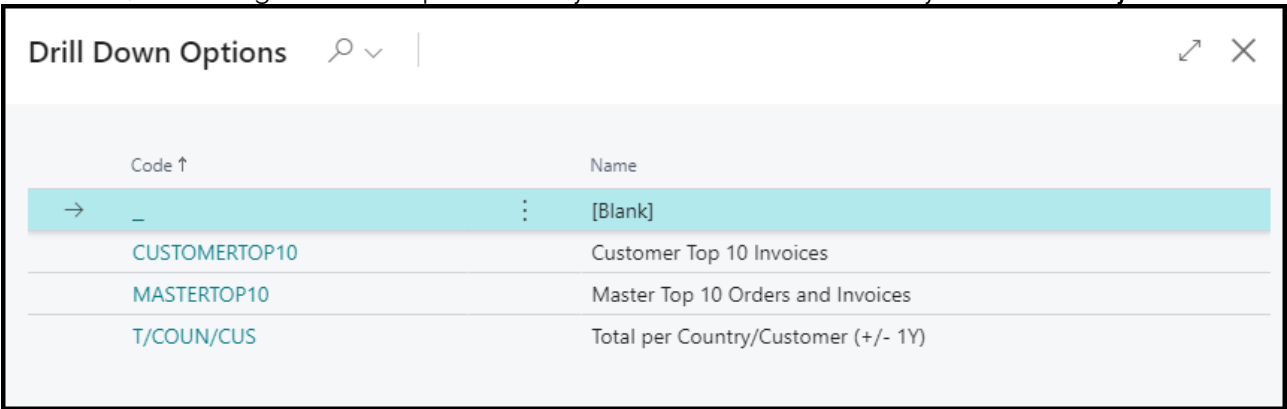
Besides setting up the **Extended Sales Statistics** by using the Setups, it is also possible to see the Sales Statistics on the fly.  
In the Role Center **TRIMIT Small Business** you can click ***Sales Statistics***, ***Sales Analytics***, or you can find it via **Search** ***Sales Analytics***.



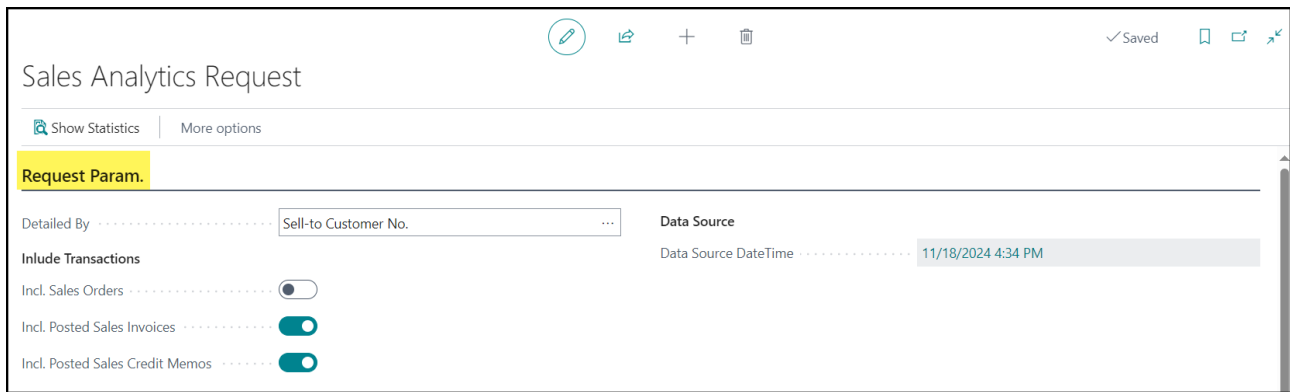
The Sales Analytics are always based on the **Statistics Data**; therefore, you can get a message to update the Data Source if it is not updated before until the current day (in an **Extended Sales Statistics Setup List** or by using a Job Queue)



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**.







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 ..... ☒

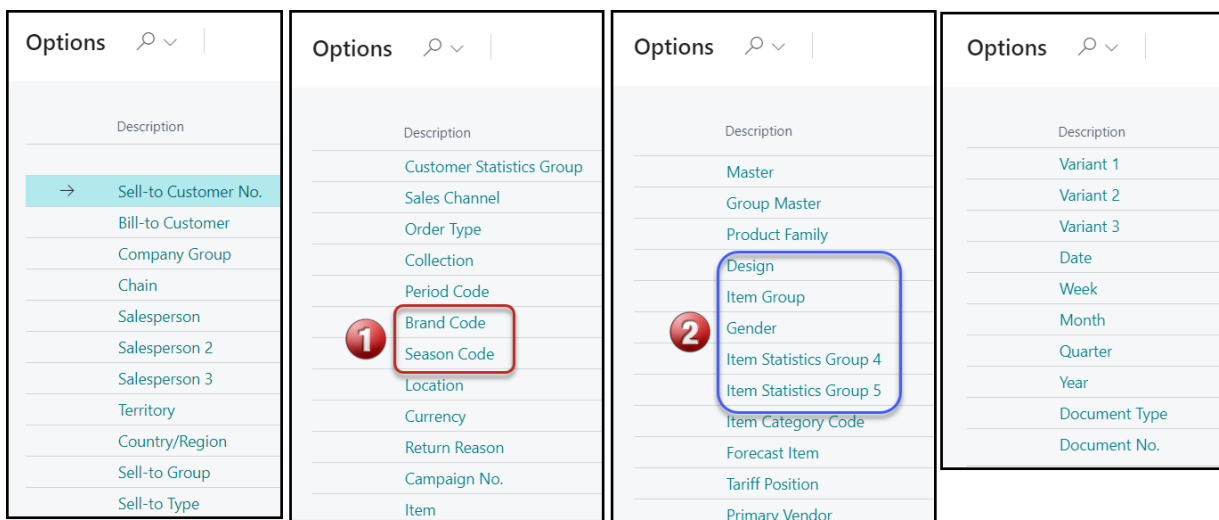
Data Source DateTime ..... 11/18/2024 4:34 PM

## 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

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.

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 updated 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 in 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 set up **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 Date ..... 1/1/2023

End Date ..... 12/31/2023

**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 .....         | ..... |

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

## Sales Analytics Request

Show Statistics
 Actions ▾ Related ▾ Fewer options

| 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                        |

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 ▾
 

Customer Statistics Group  
 Sales Channel  
 Order Type  
 Collection  
 Period Code  
 Brand Code  
 Season Code  
 Location  
 Currency  
 Return Reason  
 Campaign No.  
 Item

Options ▾
 

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

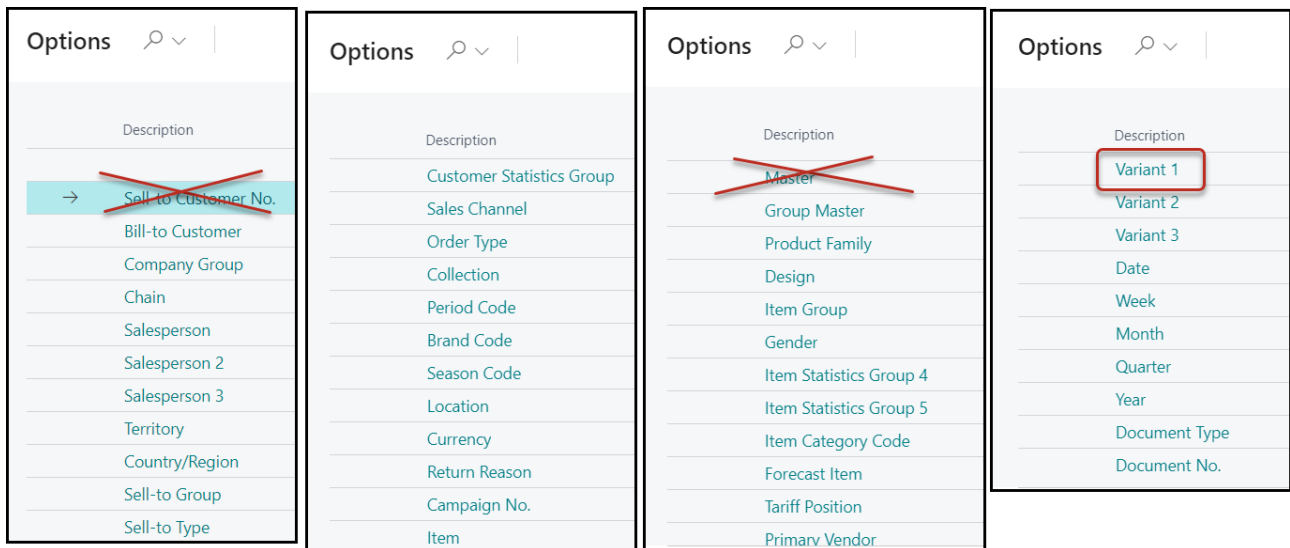
Options ▾
 

Variant 1  
 Variant 2  
 Variant 3  
 Date  
 Week  
 Month  
 Quarter  
 Year  
 Document Type  
 Document No.

| 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) |
|---------|-----------------|----------|----------------|---------------------|-----------------|------------------|-------------------------|------------------------------|--------------------------|----------------------------|
| 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**



**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 | Profit Amount LCY (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                   |
| <b>TOTAL</b> | <b>Total List</b> | <b>0</b> | <b>0</b>       | <b>0</b>            | <b>0</b>        | <b>405</b>        | <b>14,577</b>           | <b>0</b>                     | <b>5,745</b>            |

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

And the Statistics created 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                        |

# Statistics Data Warehouse

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**.

The data for the **Statistics Data Warehouse** will be created via the Action *Refresh Statistics Data* in the **Extended Sales Statistics Setup List**.

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 | Posting Date |
| Sales Invoice             | Invoice         | 103001         | 11508               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 11627               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 11746               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 11865               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 11984               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 12103               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 12222               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 15675               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 15794               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 15913               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 16032               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 16151               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |
| Sales Invoice             | Invoice         | 103001         | 16270               |                |               |              | GB                   |           | 11/5/2024  | 1/10/2023    |

You are also able to change the Data in the **Statistics Data Warehouse** by using the *Update Sales Statistics* and Filter on specific Customer-related fields and/or Item-related fields that need to be updated.

This can be useful if you have changed those fields after you have already updated the **Statistics Data Warehouse** for existing Sales Orders or Posted Sales Invoices.

This can significantly reduce the time for the Update because you do not have to create the total **Statistics Data Warehouse** from scratch via the action *Refresh Statistics Data* in the **Extended Sales Statistics Setup List**.

Statistics Data Warehouse

Update Statistics Data

More options

| Transaction Type ↑ | Document Type ↑ | Document No. ↑ | Document Line No. ↑ | Sell-to Customer No. | Item No. | Master No. | Ne |
|--------------------|-----------------|----------------|---------------------|----------------------|----------|------------|----|
| Sales Invoice      | Invoice         | 103001         | 10000               | 20000                | 1928-S   |            |    |
| Sales Invoice      | Invoice         | 103002         | 10000               | 10000                | 1960-S   |            |    |
| Sales Invoice      | Invoice         | 103003         | 10000               | 30000                | 1988-S   |            |    |
| Sales Invoice      | Invoice         | 103004         | 10000               | 50000                | 1968-S   |            |    |
| Sales Invoice      | Invoice         | 103005         | 10000               | 40000                | 1960-S   |            |    |
| Sales Invoice      | Invoice         | 103006         | 10000               | 20000                | 1900-S   |            |    |
| Sales Invoice      | Invoice         | 103006         | 20000               | 20000                | 1964-S   |            |    |
| Sales Invoice      | Invoice         | 103006         | 30000               | 20000                | 1980-S   |            |    |
| Sales Invoice      | Invoice         | 103007         | 10000               | 10000                | 1896-S   |            |    |
| Sales Invoice      | Invoice         | 103007         | 20000               | 10000                | 1972-S   |            |    |
| Sales Invoice      | Invoice         | 103007         | 30000               | 10000                | 1996-S   |            |    |
| Sales Invoice      | Invoice         | 103008         | 10000               | 50000                | 1906-S   |            |    |
| Sales Invoice      | Invoice         | 103009         | 10000               | 30000                | 1928-S   |            |    |
| Sales Invoice      | Invoice         | 103010         | 10000               | 40000                | 1908-S   |            |    |
| Sales Invoice      | Invoice         | 103010         | 20000               | 40000                | 1920-S   |            |    |
| Sales Invoice      | Invoice         | 103010         | 30000               | 40000                | 1968-S   |            |    |
| Sales Invoice      | Invoice         | 103010         | 40000               | 40000                | 1980-S   |            |    |
| Sales Invoice      | Invoice         | 103011         | 10000               | 20000                | 1900-S   |            |    |
| Sales Invoice      | Invoice         | 103012         | 10000               | 30000                | 1896-S   |            |    |
| Sales Invoice      | Invoice         | 103012         | 20000               | 30000                | 1936-S   |            |    |
| Sales Invoice      | Invoice         | 103012         | 30000               | 30000                | 1972-S   |            |    |
| Sales Invoice      | Invoice         | 103012         | 40000               | 30000                | 1996-S   |            |    |
| Sales Invoice      | Invoice         | 103013         | 10000               | 50000                | 1920-S   |            |    |
| Sales Invoice      | Invoice         | 103013         | 20000               | 50000                | 1988-S   |            |    |
| Sales Invoice      | Invoice         | 103014         | 10000               | 30000                | 1960-S   |            |    |
| Sales Invoice      | Invoice         | 103014         | 20000               | 30000                | 2000-S   |            |    |
| Sales Invoice      | Invoice         | 103015         | 10000               | 20000                | 1928-S   |            |    |

Update Statistics Data

Options

Update All ☐

Update from Customer

Customer Group (B2B, B2C) ☒ = Sell-to Group

B2C, Small, Retail Store, Consig. ☒ = Sell-to Type

Salesperson ☐

Salesperson 2 ☐

Salesperson 3 ☐

Stat. Group Customers ☐ = Customer Statistics Group

Update from Item

Design ☐ = Item Statistics Group

Item Group ☐ = Item Statistics Group 2

Gender ☐ = Item Statistics Group 3

Item Statistics Group 4 ☐

Item Statistics Group 5 ☐

Filter: Statistics Data

× Posting Date

× Sell-to Customer No.

× Item No.

+ Filter...

OK Cancel

Therefore, if you might change the **Sell-to Group** of a Customer, you can change this **Sell-to Group** in all existing records of the **Statistics Data Warehouse** easily and quickly by using the **Update Statistics Data**.

**Note**

The red text in the picture above relates to the original names of the fields in the Customer or Master/Item, but they were changed based on the **Caption Class Setup**.  
For more details see *White Paper – TRIMIT Setups*.