



# DataSelf Analytics

## LIST OF OUT-OF-THE-BOX REPORTS, DASHBOARDS AND KPIs

Revision Date: 05/06/2014



*Subject to change without notice.*

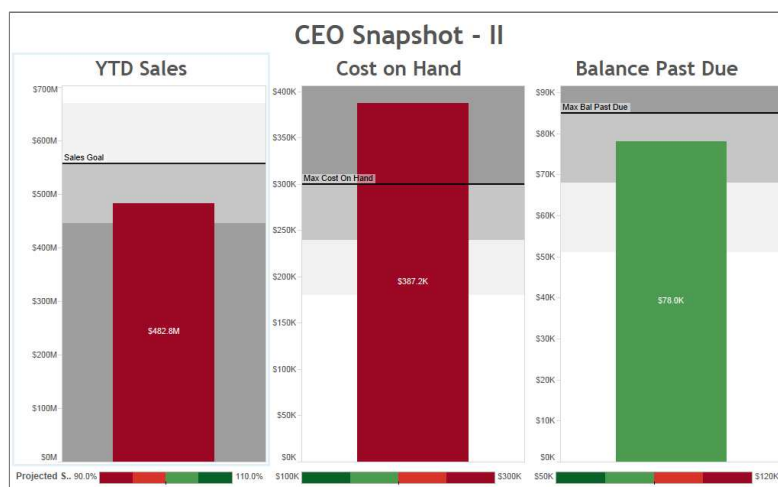
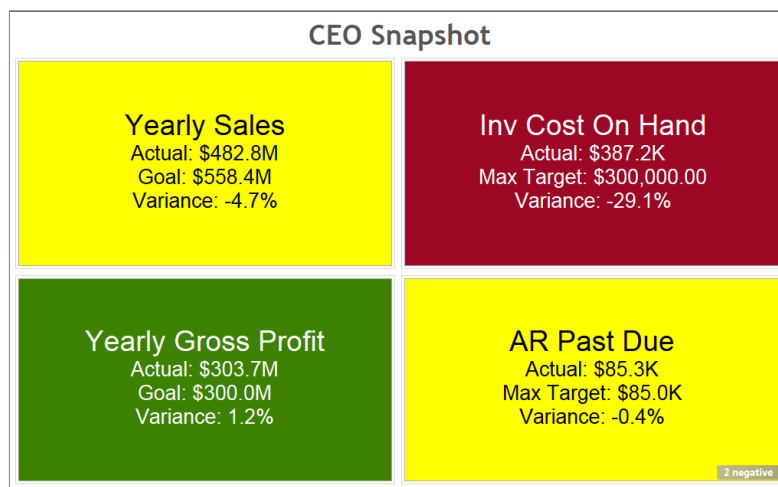
*We are in the process of converting our client-side out-of-the-box templates into DataSelf Analytics in-memory platform (powered by Tableau OEM). The client-side solution has been greatly improved with better and faster data visualization and reporting capabilities. Clients will be able to take advantage of the converted templates as we roll them out. Some modules may not be available for a specific ERP or CRM system, please consult DataSelf for details.*

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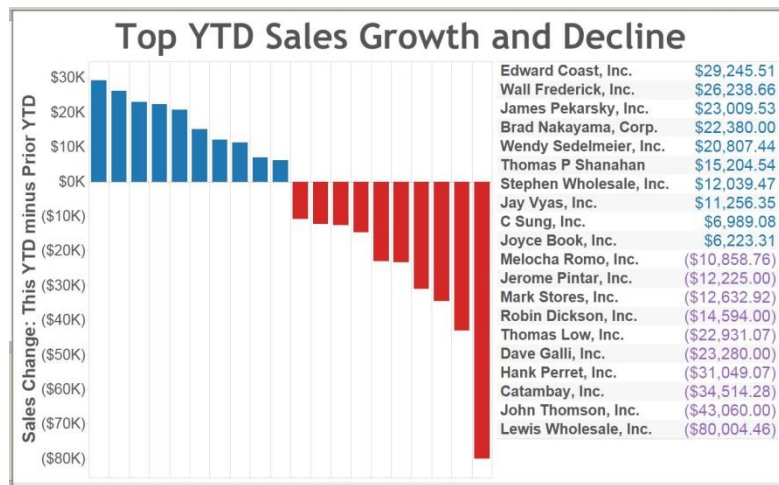
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## EXAMPLES OF OUT-OF-THE-BOX DASHBOARDS

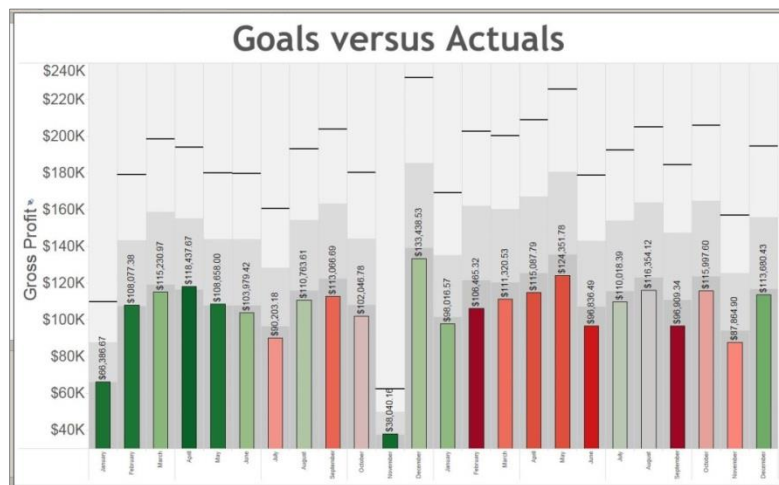


*These are two examples of C-Level dashboards. Such dashboards are usually customized to each C-Level executive. They are meant to be simple yet informative about KPIs that matter the most.*

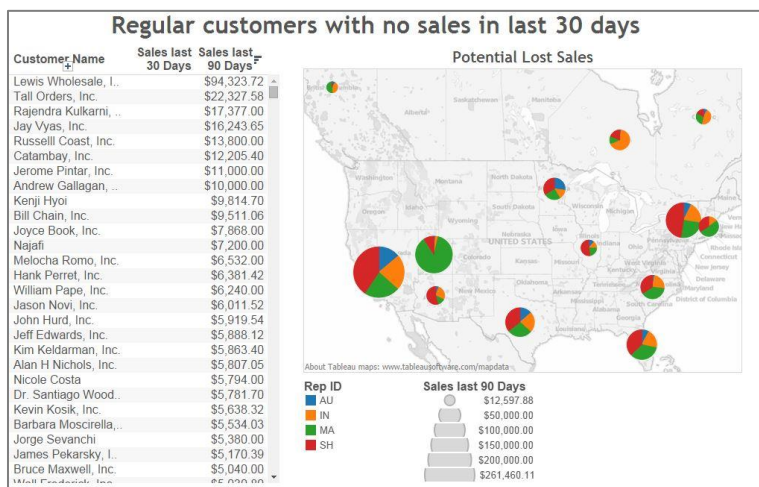
*From these dashboards, management can go into other dashboards that will provide more detailed information.*



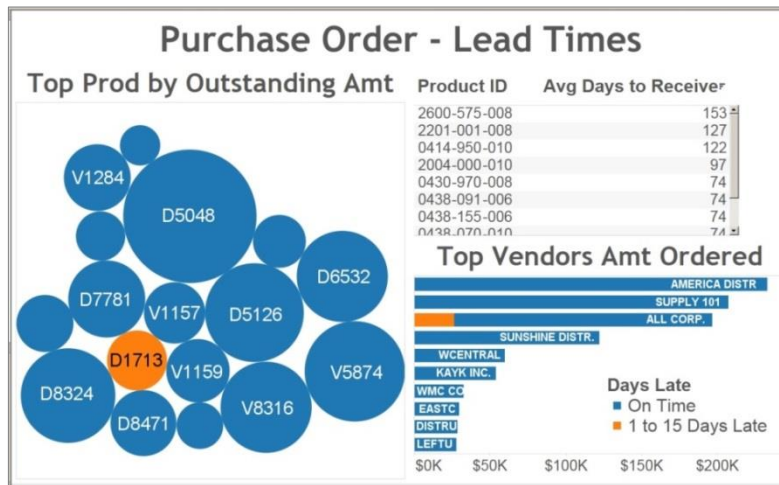
This type of dashboard shows the tips of the growth curve of a major metric. In this example, the top customers by sales growth and decline in a YTD basis.



A bullet-chart for goals versus actuals. Bars represent actuals, horizontal lines represent goals, the gray background bars represent performance areas: poor (dark gray), satisfactory (gray) and good (light gray).



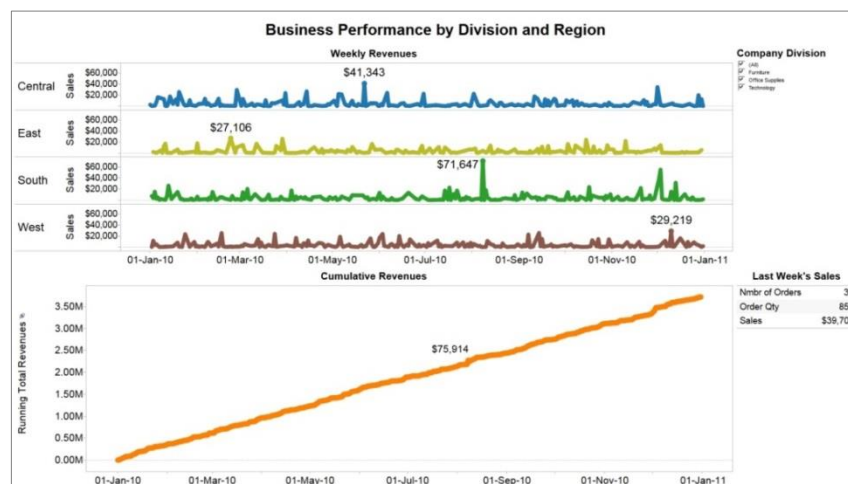
Exception reporting: This type of dashboard shows transactions that are no longer happening. In this example, regular customers who are no longer buying.



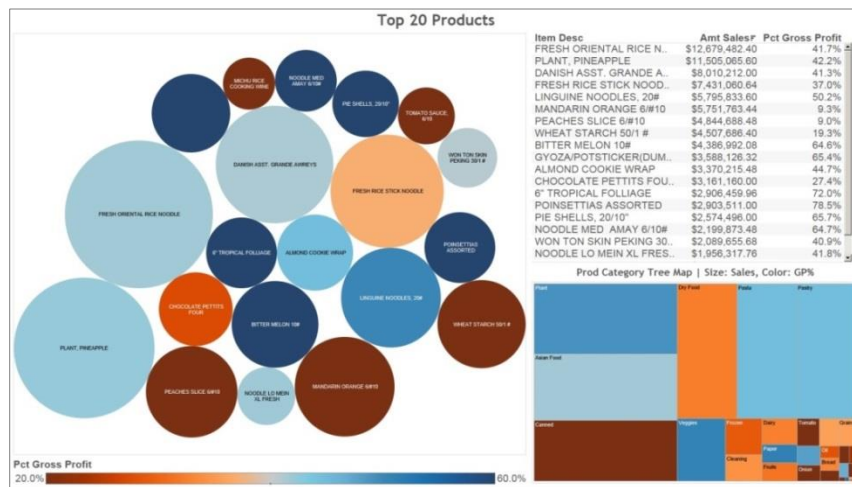
PO Lead Times KPIs: bubbles for the top product IDs by outstanding amount, a list of top product IDs by average days to receive, and top vendors for amount ordered in this period. Orange colors represent amounts that are 1 to 15 days late.



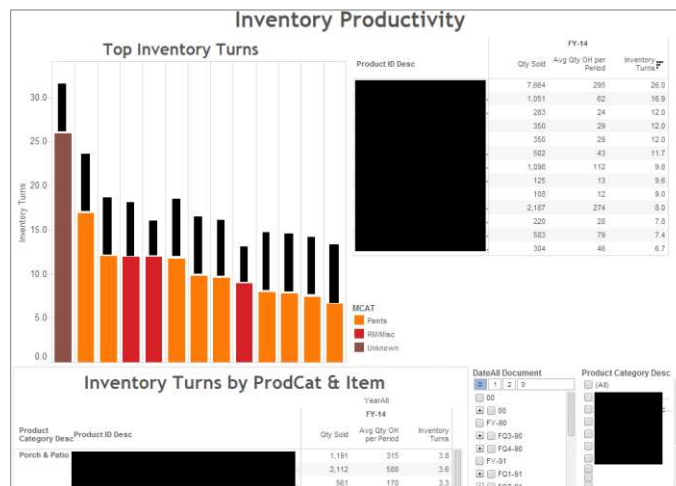
Top performers: This type of dashboard shows top performers from a major KPI and how they are doing versus another major KPI. In this example, top customers by sales this YTD and their profitability.



Business Performance by Division and Region



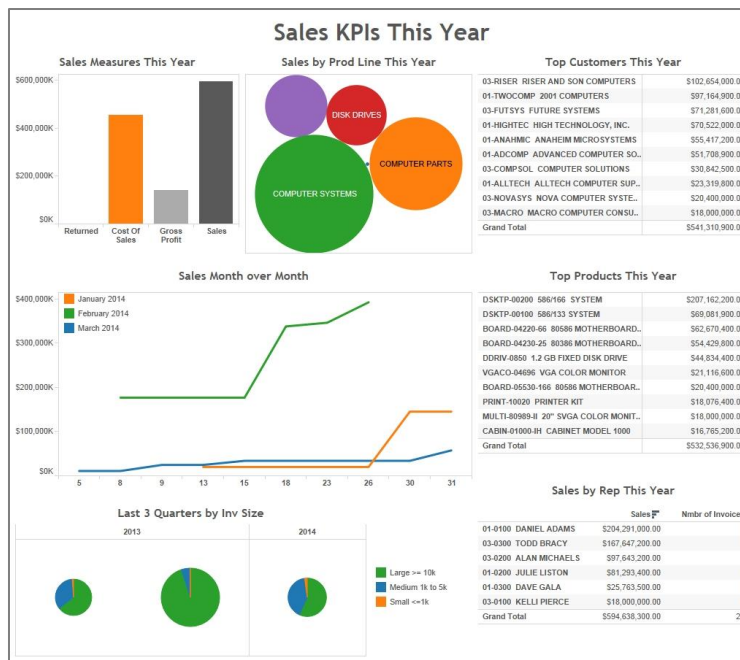
Top 20 Products Dashboards



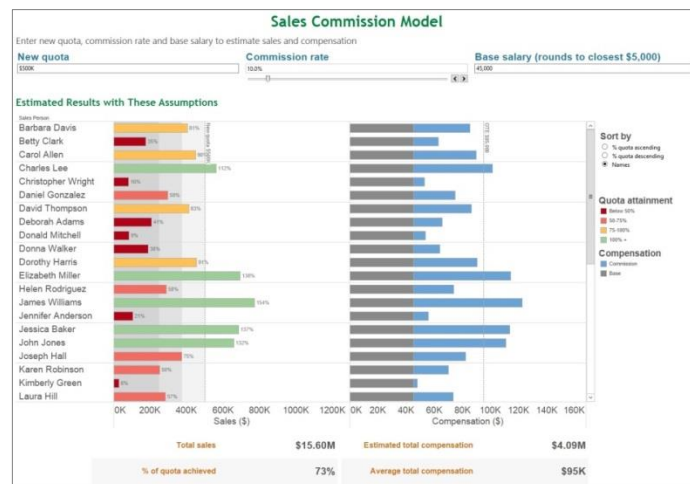
Inventory Productivity Dashboards – blacked out areas for privacy of data



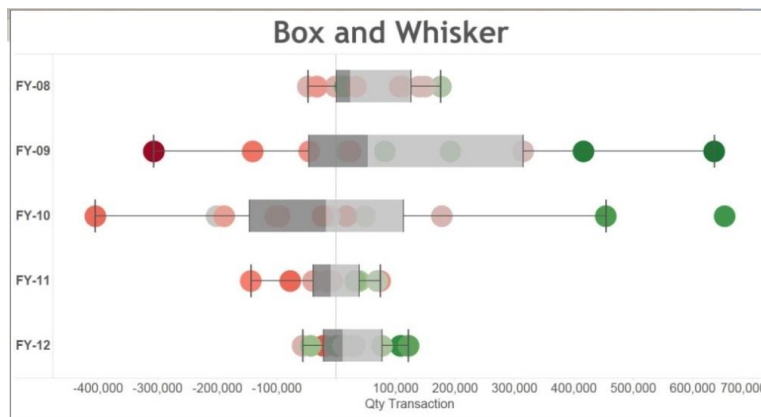
Pricing Strategy for Tier 1 Customers Dashboard – blacked out areas for privacy of data



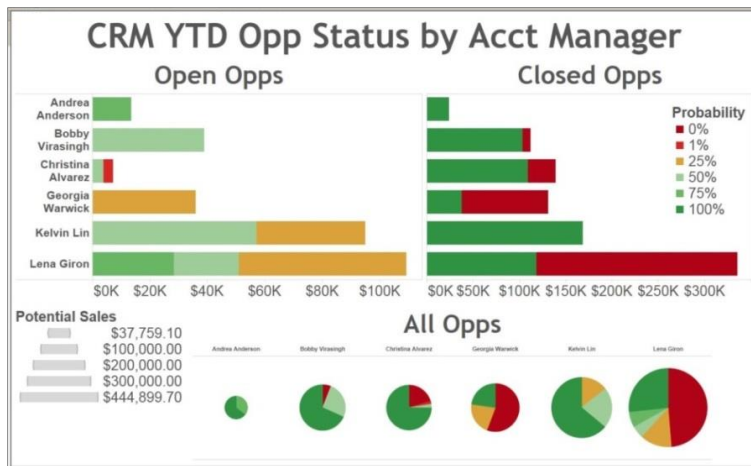
Consolidation dashboards: This type of dashboard consolidates several KPIs.



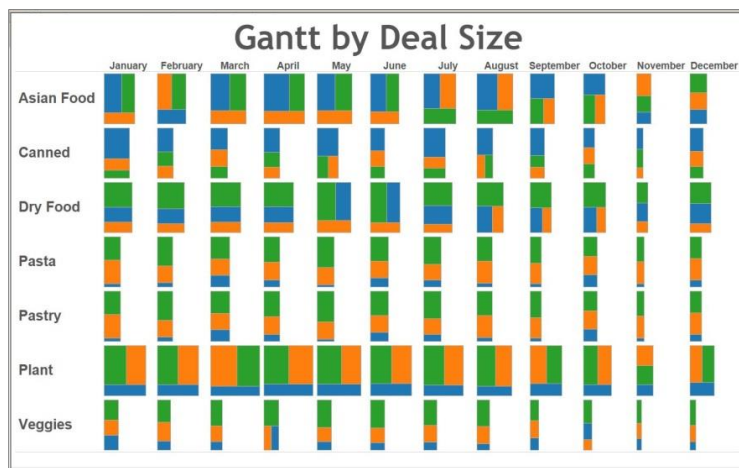
Sales Commission Example



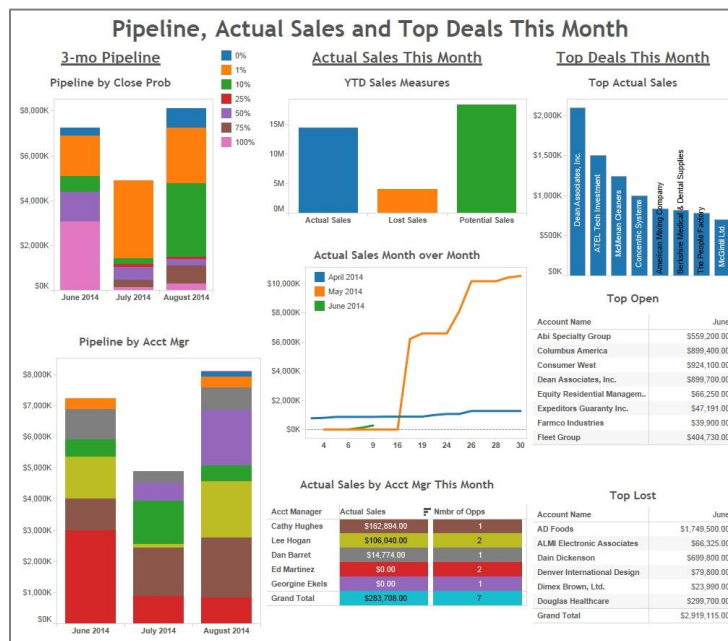
Box and Whisker Dashboard



CRM YTD Opportunity Status by Acct Manager



Gantt Chart by Deal Size



Consolidation dashboards: This type of dashboard consolidates several KPIs.

## LIST OF OUT-OF-THE-BOX REPORTS, DASHBOARDS AND KPIs – v1010

### Cash Flow Module

This module factors today's cash, receivables, payables, recurring revenues and expenses, and allows you to make adjustments as needed. You can see the information in any granularity down to customer, vendor and days.

#### Example of Key Performance Indicators

1	Amt Available Today	1
2	Amt Available Projected	2
3	Amt Outstanding Payments	3
4	Amt Outstanding Receipts	4

#### Example of Dimensions, Hierarchies and Attributes

5	Bank Account	5
6	Customer	6
7	Expected Date	7
8	GL Account	8
9	Vendor	9

#### Example of Cash Flow Reports

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### CRM - Communications Module

#### Key Performance Indicators

1	Nmbr of Communications	14
2	Nmbr of Complete Communications	15
3	Nmbr of Pending Communications	16
4	Pct Complete Communications	17
5	Pct of Team's Communications	18
6	Avg Nmbr of Communications per Day	19

#### Dimensions, Hierarchies and Attributes

##### Communication Date

7	a Season	20
8	a Date	21
9	a Day of Period	22
10	a Day of Quarter	23
11	a Day of Week	24
12	a Day of Year	25
13	a Period	26
14	a Period Name	27
15	a Quarter	28
16	a Quarter Name	29
17	a Week	30
18	a Week of Year	31
19	a Year	32
20	Date	33
21	Period	34
22	Quarter	35
23	Rolling Half Year	36
24	Rolling Month	37
25	Rolling Quarter	38
26	Rolling Week	39
27	Rolling Year	40
28	td Period	41
29	td Quarter	42
30	td Year	43
31	Year	44

##### CRM Communication



32	Acct Manager	45
33	Action	46
34	Priority	47
35	Status	48
36	Type	49

**CRM Communication Reports**

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38	Communications per Priority	51
39	Communications per Priority and User	52
40	Communications per Action	53
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Note: Most CRM system deployments have been customized, many to a considerable degree. Our out-of-the-box for CRM may require additional professional services so that our solution matches the way your CRM system works. Please consult us for details.

**CRM - Opportunity/Campaign Management Module**

**Key Performance Indicators**

1	Account Amt Open Opportunity	60
2	Account Amt Opportunity Won in 1 Year	61
3	Account Nmbr of Open Support Cases	62
4	Account Nmbr of Open Support Cases in High Priority	63
5	Account Nmbr of Support Cases in 1 Year	64
6	Acct Mgr Amt Opportunity Won in 1 Year	65
7	Acct Mgr Amt Total Open Opportunity	66
8	Acct Mgr Nmbr of Open Support Cases	67
9	Acct Mgr Nmbr of Open Support Cases High Priority	68
10	Acct Mgr Nmbr of Support Cases in 1 Year	69
11	Amt Lost	70
12	Amt Lost Sales Growth from Prior Period	71
13	Amt Open	72
14	Amt Opportunity	73
15	Amt Probable	74
16	Amt Sales Growth from Prior Period	75
17	Amt Sold	76
18	Amt Sold Change since Prior Period	77
19	Avg Amt Lost per Opportunity	78
20	Avg Amt Sold per Opportunity	79
21	Avg Time Elapsed per Opportunity	80
22	Nmbr of Lost Opportunities	81
23	Nmbr of Open Opportunities	82
24	Nmbr of Opportunities	83
25	Nmbr of Won Opportunities	84
26	Time Elapsed	85

**Dimensions, Hierarchies and Attributes**

**Account/Customer**

27	Account Manager	86
28	Account Id	87
29	Account Id Name	88
30	Account Name	89
31	Account Name with Open Support Cases	90
32	Account Name with Opportunity Amount	91
33	Account Address	92
34	Account City	93
35	Account State	94
36	Account Zip/PC	95

37	Account Country	96
38	Account Type	97
39	Territory	98
	<b>Account Manager</b>	
40	Account Manager Id	99
41	Account Manager Id Name	100
42	Account Manager Name	101
43	Account Manager Name with Open Support Cases	102
44	Account Manager Name with Opportunity Amount	103
45	Territory	104
46	Title	105
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51	Close Probability	110
52	Decision Timeframe	111
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54	Lear Source	113
55	Opportunity Description	114
56	Opportunity Id	115
57	Priority	116
58	Product	117
59	Sales Cycle State	118
60	Status	119
61	Type	120
	<b>Close Date</b>	
62	a Season	121
63	a Date	122
64	a Day of Period	123
65	a Day of Quarter	124
66	a Day of Week	125
67	a Day of Year	126
68	a Period	127
69	a Period Name	128
70	a Quarter	129
71	a Quarter Name	130
72	a Week	131
73	a Week of Year	132
74	a Year	133
75	Date	134
76	Period	135
77	Quarter	136
78	Rolling Half Year	137
79	Rolling Month	138
80	Rolling Quarter	139
81	Rolling Week	140
82	Rolling Year	141
83	td Period	142
84	td Quarter	143
85	td Year	144
86	Year	145
	<b>Document Date</b>	
87	a Season	146
88	a Date	147
89	a Day of Period	148
90	a Day of Quarter	149
91	a Day of Week	150

92	a Day of Year	151
93	a Period	152
94	a Period Name	153
95	a Quarter	154
96	a Quarter Name	155
97	a Week	156
98	a Week of Year	157
99	a Year	158
100	Date	159
101	Period	160
102	Quarter	161
103	Rolling Half Year	162
104	Rolling Month	163
105	Rolling Quarter	164
106	Rolling Week	165
107	Rolling Year	166
108	td Period	167
109	td Quarter	168
110	td Year	169
111	Year	170
	<b>Target Close Date</b>	
112	a Season	171
113	a Date	172
114	a Day of Period	173
115	a Day of Quarter	174
116	a Day of Week	175
117	a Day of Year	176
118	a Period	177
119	a Period Name	178
120	a Quarter	179
121	a Quarter Name	180
122	a Week	181
123	a Week of Year	182
124	a Year	183
125	Date	184
126	Period	185
127	Quarter	186
128	Rolling Half Year	187
129	Rolling Month	188
130	Rolling Quarter	189
131	Rolling Week	190
132	Rolling Year	191
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135	td Year	194
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Note: Most CRM system deployments have been customized, many to a considerable degree. Our out-of-the-box for CRM may require additional professional services so that our solution matches the way your CRM system works. Please consult us for details.

## CRM - Technical Support Module

### Key Performance Indicators

1	Account Amt Open Opportunity	316
2	Account Amt Opportunity Won in 1 Year	317

3	Avg Resolution Time	318
4	Nmbr of 1st Call Resolutions	319
5	Nmbr of Case Steps	320
6	Nmbr of Cases	321
7	Nmbr of Closed Cases	322
8	Nmbr of Open Cases	323
9	Pct of 1st Call Resolutions	324
10	Pct Closed Cases	325
11	Pct Open Cases	326
12	Nmbr of Cases Growth from Prior Period	327
13	SupportRep Amt Total Open Opportunity	328
14	SupportRep Amt Total Opportunity Won in 1 Year	329
15	Time Elapsed	330

**Dimensions, Hierarchies and Attributes**

**Close Date**

16	a Season	331
17	a Date	332
18	a Day of Period	333
19	a Day of Quarter	334
20	a Day of Week	335
21	a Day of Year	336
22	a Period	337
23	a Period Name	338
24	a Quarter	339
25	a Quarter Name	340
26	a Week	341
27	a Week of Year	342
28	a Year	343
29	Date	344
30	Period	345
31	Quarter	346
32	Rolling Half Year	347
33	Rolling Month	348
34	Rolling Quarter	349
35	Rolling Week	350
36	Rolling Year	351
37	td Period	352
38	td Quarter	353
39	td Year	354
40	Year	355

**Document Date**

41	a Season	356
42	a Date	357
43	a Day of Period	358
44	a Day of Quarter	359
45	a Day of Week	360
46	a Day of Year	361
47	a Period	362
48	a Period Name	363
49	a Quarter	364
50	a Quarter Name	365
51	a Week	366
52	a Week of Year	367
53	a Year	368
54	Date	369
55	Period	370
56	Quarter	371
57	Rolling Half Year	372
58	Rolling Month	373
59	Rolling Quarter	374

60	Rolling Week	375
61	Rolling Year	376
62	td Period	377
63	td Quarter	378
64	td Year	379
65	Year	380
	<b>Target Close Date</b>	
66	a Season	381
67	a Date	382
68	a Day of Period	383
69	a Day of Quarter	384
70	a Day of Week	385
71	a Day of Year	386
72	a Period	387
73	a Period Name	388
74	a Quarter	389
75	a Quarter Name	390
76	a Week	391
77	a Week of Year	392
78	a Year	393
79	Date	394
80	Period	395
81	Quarter	396
82	Rolling Half Year	397
83	Rolling Month	398
84	Rolling Quarter	399
85	Rolling Week	400
86	Rolling Year	401
87	td Period	402
88	td Quarter	403
89	td Year	404
90	Year	405
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91	Account Manager	406
92	Account Id	407
93	Account Id Name	408
94	Account Name	409
95	Account Name with Open Support Cases	410
96	Account Name with Opportunity Amount	411
97	Account Address	412
98	Account City	413
99	Account State	414
100	Account Zip/PC	415
101	Account Country	416
102	Account Type	417
103	Territory	418
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105	Case Id	420
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107	Problem Type	422
108	Solution Type	423
109	Stage	424
110	Status	425
111	Support Rep	426
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161	Open Cases by SuppRep, Account w/ OppAmt, and Case Stage	476
162	Open Cases by SuppRep, Account w/ OppAmt, and Problem Type	477
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164	Performance by SuppRep	479
165	Performance Map: Case Count and Avg Resolution Time by SuppRep (g)	480
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Note: Most CRM system deployments have been customized, many to a considerable degree. Our out-of-the-box for CRM may require additional professional services so that our solution matches the way your CRM system works. Please consult us for details.

## DataSelf BI BAM (Alerts) Module



**Alerts**

1	Customers: Balance Due > \$10,000	482
2	Customers: Balance Due > \$25,000 and No Payments Received	483
3	Customers: Credit Limit has Changed	484
4	Customers: Credit Used > 75%	485
5	Customers: Credit Used > 90%	486
6	Customers: Invoices; Invoices Issued Today	487
7	Customers: Invoices; Invoices Issued Today > \$2,000	488
8	Customers: Past Due Balance > \$1,000 and No Payments	489
9	Customers: Past Due Balance > \$5,000 and No Payments	490
10	Customers: Payment Terms Have Changed	491
11	Customers: Primary Salesperson Has Changed	492
12	Customers; Added Today	493
13	Customers; Balance Due < 0	494
14	Customers; Balance Due > 0	495
15	Inventory; Items; Cost on Hand > \$20,000	496
16	Inventory; Items; Qty on Hand – Qty on Sales Order < 10	497
17	Inventory; Items; Qty on Hand > 250	498
18	Orders; Due to Ship within 1 Week	499
19	Orders; Due to Ship within 2 Weeks	500
20	Orders; Hold Status is Changed	501
21	Orders; Line Items; Gross Profit < 7%	502
22	Orders; On Hold	503
23	PO; Line Items Expected to Arrive this Week	504
24	PO; Oh Hold	505
25	Vendors; Balance Due > \$10,000	506
26	Vendors; New Vendors Added in the Last 7 Days	507

**GL - Budgeting and Forecasting**

The GL Budgeting and Forecasting Module can be easily customized to reflect each client's specific needs. For instance, when planning GL forecasts or budgets for the coming year, the module can automatically start with annualized actuals from the current year. Year-over-year adjustments can be applied across-the-board and fine-tuned. For example, if a manager projects a 5% increase in marketing or payroll expenses, that increase can be filled in for the whole year. The change will propagate to every period and sub-account and can then be fine-tuned. If the first quarter will show a smaller increase, the manager can use the same automatic function to adjust increases by quarter. Users can do forecasting/budgeting with any combination of GL groupings, segments or accounts using any kind of time buckets like days, weeks or months.

The system can populate future budgeting and forecasting amounts based on prior actuals or from information from an outside source or a combination of both. Later, users can monitor actuals versus budgets in any time period. The system can also be set up to work with a large number of —official and —provisional budget/forecasting versions.

Managers can easily restrict the view of any user. For instance, a sales representative can be limited to viewing only his own actual sales and updating his own provisional budget. Meanwhile, his sales manager would have a wider view of actual sales and update budgets for her whole West Coast sales team.

**Example of Key Performance Indicators**

1	Actual Trans Amt	508
2	Actual Trans Amt Prior Period	509
3	Actual Trans Amt This Period vs. Same Period Prior Year	510
4	Actual Trans Amt YTD	511
5	Budgeted/Forecast Trans Amt	512
6	Budgeted/Forecast Trans Amt Prior Period	513
7	Budgeted/Forecast Trans Amt This Period vs. Same Period Prior Year	514
8	Budgeted/Forecast Trans Amt YTD	515
9	Provisional 1 Budget/Forecast Trans Amt	516
10	Provisional 1 Budget/Forecast Trans Amt Prior Period	517
11	Provisional 1 Budget/Forecast Trans Amt This Period vs. Same Period Prior Year	518
12	Provisional 1 Budget/Forecast Trans Amt YTD	519
13	Provisional 2 Budget/Forecast Trans Amt	520
14	Provisional 2 Budget/Forecast Trans Amt Prior Period	521
15	Provisional 2 Budget/Forecast Trans Amt This Period vs. Same Period Prior Year	522
16	Provisional 2 Budget/Forecast Trans Amt YTD	523

**Example of Dimensions, Hierarchies and Attributes**

17	Company	524
18	Departments	525
19	GL Account	526
20	GL Group	527
21	GL Segments	528
22	Budget/Forecast Date	529
<b>Example of Sales Commission Reports</b>		
23	Actual and Forecast/Budget Transaction Amt by GL Account	530
24	Actual and Forecast/Budget Transaction Amt by Period	531
25	Actual and Forecast/Budget Transaction Amt by GL Group	532
26	Actual and Forecast/Budget Transaction Amt by GL Segments	533

## GL Financials - Balance Sheet and P&L

### Example of Key Performance Indicators

1	Actual Amount	534
2	Actual Amount Prior Period	535
3	Actual Amount Prior Year	536
4	Actual Amount Prior YTD	537
5	Actual Amount Same Period Prior Year	538
6	Actual Amount YTD	539
7	Actual Variance This Period vs. Same Period Prior Year	540
8	Actual Variance YTD vs. Prior YTD	541
9	Balance Prior Period	542
10	Balance Prior YTD	543
11	Balance Variance This Period vs. Prior Period	544
12	Balance Variance This Period vs. Same Period Prior Year	545
13	Balance Variance YTD vs. Prior YTD	546
14	Balance YTD	547
15	Open Balance	548
16	Open Balance Prior Year	549
17	Open Balance This Year	550
18	Percent Actual Variance This Period vs. Same Period Prior Year	551
19	Percent Actual Variance YTD vs. Prior YTD	552
20	Percent Balance Variance This Period vs. Same Period Prior Year	553
21	Percent Balance Variance YTD vs. Prior YTD	554

### Example of Dimensions, Hierarchies and Attributes

22	Company	555
23	Departments	556
24	GL Account	557
25	GL Group	558
26	GL Segments	559
27	GL Financial Groupings (Assets, Liabilities, Equity, etc.)	560

### Example of Balance Sheet Reports

28	Balance Sheet	561
29	Balance Sheet sliced by Segment2	562
30	Balance Sheet sliced by Segment3	563
31	Balance Sheet YTD vs. Prior YTD	564
32	Balance Sheet YTD vs. Prior YTD sliced by Segment2	565
33	Balance Sheet YTD vs. Prior YTD sliced by Segment3	566
34	Beginning Balance, Net Posted & YTD Balance	567
35	Beginning Balance, Net Posted & YTD Balance sliced by Seg2	568
36	Beginning Balance, Net Posted & YTD Balance sliced by Seg3	569
37	Net Posted This Period vs. Same Period Prior Year	570
38	Net Posted This Period vs. Same Period Prior Year sliced by Seg2	571
39	Net Posted This Period vs. Same Period Prior Year sliced by Seg3	572

### Example of P&L / Income Statement Reports

40	Income Statement	573
41	Income Statement sliced by Segment2	574
42	Income Statement sliced by Segment3	575
43	Income Statement YTD vs. Prior YTD	576

44	Income Statement YTD vs. Prior YTD sliced by Segment2	577
45	Income Statement YTD vs. Prior YTD sliced by Segment3	578
46	Income Statement This Period vs. Same Period Prior Year	579
47	Income Statement This Period vs. Same Period Prior Year sliced by Segment2	580
48	Income Statement This Period vs. Same Period Prior Year sliced by Segment3	581

## GL Transaction Module

### Key Performance Indicators

1	Amt Credit	582
2	Amt Debit	583
3	Amt Posted	584
4	Amt Posted Accrued	585
5	Amt Posted Growth from Prior Period	586
6	Amt Posted Growth from Prior YTD	587
7	Amt Posted Growth from Same Period Prior Year	588
8	Amt Posted Prior YTD	589
9	Amt Posted YTD	590
10	Nmbr of Transactions	591
11	Pct Amt Posted Growth from Prior Period	592
12	Pct Amt Posted Growth from Prior YTD	593

### Dimensions, Hierarchies and Attributes

#### Company

13	Company Id	594
14	Company Id Name	595
15	Company Name	596

#### GL Account

16	GL Acct Description	597
17	GL Acct Number	598
18	GL Acct Number Description	599
19	GL Acct Type	600
20	GL Segment 1	601
21	GL Segment 2	602
22	GL Segment 3	603
23	GL Segment 4	604
24	GL Segment 5	605

#### Document Date

25	a Season	606
26	a Date	607
27	a Day of Period	608
28	a Day of Quarter	609
29	a Day of Week	610
30	a Day of Year	611
31	a Period	612
32	a Period Name	613
33	a Quarter	614
34	a Quarter Name	615
35	a Week	616
36	a Week of Year	617
37	a Year	618
38	Date	619
39	Period	620
40	Quarter	621
41	Rolling Half Year	622
42	Rolling Month	623
43	Rolling Quarter	624
44	Rolling Week	625
45	Rolling Year	626
46	td Period	627
47	td Quarter	628
48	td Year	629

49	Year	630
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50	Posted Amt This Year by GL Account	631
51	Posted Amt This Year by GL Segment	632
52	Posted Amt This Year by GL Segment and	633
52	Posted Amt This Year by GL Segment and	633
53	Posted Amt This Year by GL Segment	634
54	Posted Amt This Year by GL Segment and	635
54	Posted Amt This Year by GL Segment and	635
55	Posted Amt This Year by GL Segment	636
56	Posted Amt This Year by GL Segment and	637
57	Posted Amt and Accrued Balance This Year by GL Account	638
58	Posted Amt and Accrued Balance This Year by GL Segment	639
59	Posted Amt and Accrued Balance This Year by GL Segment and	640
59	Posted Amt and Accrued Balance This Year by GL Segment and	640
60	Posted Amt and Accrued Balance This Year by GL Segment	641
61	Posted Amt and Accrued Balance This Year by GL Segment and	642
62	Posted Amt and Accrued Balance This Year by GL Segment	643
63	Posted Amt and Accrued Balance This Year by GL Segment and	644
64	Posted Amt This YTD vs. Prior YTD by GL Account	645
65	Posted Amt This YTD vs. Prior YTD by GL Segment	646
66	Posted Amt This YTD vs. Prior YTD by GL Segment and	647
66	Posted Amt This YTD vs. Prior YTD by GL Segment and	647
67	Posted Amt This YTD vs. Prior YTD by GL Segment, and	648
68	Posted Amt This YTD vs. Prior YTD by GL Segment	649
69	Posted Amt This YTD vs. Prior YTD by GL Segment and	650
69	Posted Amt This YTD vs. Prior YTD by GL Segment and	650
70	Posted Amt This YTD vs. Prior YTD by GL Segment	651
71	Posted Amt This YTD vs. Prior YTD by GL Segment and	652
72	Posted Amt This YTD vs. Prior YTD by GL Segment, and	653
73	Posted Amt This Period vs. Prior Period by GL Account	654
74	Posted Amt This Period vs. Prior Period by GL Segment	655
75	Posted Amt This Period vs. Prior Period by GL Segment and	656
75	Posted Amt This Period vs. Prior Period by GL Segment and	656
76	Posted Amt This Period vs. Prior Period by GL Segment	657
77	Posted Amt This Period vs. Prior Period by GL Segment and	658
77	Posted Amt This Period vs. Prior Period by GL Segment and	658
78	Posted Amt This Period vs. Prior Period by GL Segment	659
79	Posted Amt This Period vs. Prior Period by GL Segment and	660

## Inventory History Module

### Key Performance Indicators

1	Amt Cost of Sales	661
2	Amt Cost On Hand Today	662
3	Amt Cost On Hand Today vs. Historical Discrepancies	663
4	Amt Historical Cost On Hand	664
5	Amt Transaction Cost	665
6	Avg Amt Cost On Hand per Period	666
7	Avg Amt Transaction Unit Cost	667
8	Avg Nmbr of Days in Stock	668
9	Avg Qty On Hand per Period	669
10	Nmbr of Inventory Transactions	670
11	Nmbr of Inventory Turns	671
12	Qty Historical On Hand	672
13	Qty On Hand Today	673
14	Qty On Hand Today vs. Historical Discrepancies	674
15	Qty Transaction	675

### Dimensions, Hierarchies and Attributes

#### Company

16	Company Id	676
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17	Company Id Name	677
18	Company Name	678
	<b>Document Date</b>	
19	a Season	679
20	a Date	680
21	a Day of Period	681
22	a Day of Quarter	682
23	a Day of Week	683
24	a Day of Year	684
25	a Period	685
26	a Period Name	686
27	a Quarter	687
28	a Quarter Name	688
29	a Week	689
30	a Week of Year	690
31	a Year	691
32	Date	692
33	Period	693
34	Quarter	694
35	Rolling Half Year	695
36	Rolling Month	696
37	Rolling Quarter	697
38	Rolling Week	698
39	Rolling Year	699
40	td Period	700
41	td Quarter	701
42	td Year	702
43	Year	703
	<b>Product</b>	
44	Product Description	704
45	Product Id	705
46	Product Id Description	706
47	Product Line/Cat/Class Description	707
48	Product Line/Cat/Class Id	708
49	Product Line/Cat/Class Id Description	709
50	Quantity On Hand	710
51	Unit Cost	711
52	Unit of Measure	712
53	Unit Price	713
	<b>Warehouse</b>	
54	Warehouse Name	714
55	Warehouse Id	715
56	Warehouse Id Name	716
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57	Avg Cost OH per Period by Product	717
58	Avg Cost OH per Period by Product Line	718
59	Avg Cost OH per Period by Warehouse	719
60	Avg Nbr of Days in Stock by Product	720
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62	Avg Nbr of Days in Stock by Warehouse	722
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64	Historical Cost OH by Product by Period (g)	724
65	Historical Cost OH by Product by Period, Prod Line sliced (g)	725
66	Historical Cost OH by Product by Period, Warehouse sliced (g)	726
67	Historical Cost OH by Product Line by Period	727
68	Historical Cost OH by Warehouse by Period	728
69	Historical Cost and Qty OH by Period, Product sliced (g)	729
70	Historical Cost and Qty OH by Period, Prod Line sliced (g)	730
71	Historical Cost and Qty OH by Period, Warehouse sliced (g)	731
72	Historical Qty OH by Product by Period (g)	732

73	Historical Qty OH by Product by Period, Prod Line sliced (g)	733
74	Historical Qty OH by Product by Period, Warehouse sliced (g)	734
75	Inventory Transaction Code Analysis This Year by Product	735
76	Inventory Transaction Code Analysis This Year by Product Line	736
77	Inventory Transaction Code Analysis This Year by Warehouse	737
78	Inventory Turnover This Year by Product	738
79	Inventory Turnover This Year by Product and Warehouse	739
80	Inventory Turnover This Year by Product Line	740
81	Inventory Turnover This Year by Warehouse and Product	741
<b>On Hand Today Reports</b>		
82	Cost OH Today by Product, Pie Chart Top 0 (g)	742
83	Cost OH Today by Product, Pie Chart Top 00, Prod Line sliced (g)	743
84	Cost OH Today by Product, Pie Chart Top 00, Warehouse sliced (g)	744
85	Cost OH Today Pie Chart by Product Line (g)	745
86	Cost OH Today Pie Chart by Warehouse (g)	746
87	Qty and Cost OH Today by Product	747
88	Qty and Cost OH Today by Product and Warehouse	748
89	Qty and Cost OH Today by Product Line	749
90	Qty and Cost OH Today by Product Line and Product	750
91	Qty and Cost OH Today by Product Line and Warehouse	751
92	Qty and Cost OH Today by Warehouse	752
93	Qty and Cost OH Today by Warehouse and Product	753
94	Qty and Cost OH Today by Warehouse and Product Line	754
<b>Top and Bottom Performers Reports</b>		
95	Bottom Products by Inventory Turnover This Year	755
96	Performance Map-Cost OH Today and Inventory Turns This Year (g)	756
97	Performance Map-Qty OH Today and Inventory Turns This Year (g)	757
98	Products with Inv Transactions Last Days, No Tran Last days	758
99	Slow Moving Products This Year	759
100	Slow Moving Products This Year , Prod Line sliced	760
101	Slow Moving Products This Year , Warehouse sliced	761
102	Stacked Cost OH Today by Top - Products- by -COS- This - Year (g)	762
103	Stacked Cost OH Today by Top - Products- by -Cost-OH-Today (g)	763
104	Top Products by Cost OH Today (g)	764
105	Top Products by Inventory Turnover This Year (g)	765
106	Top Products by Nmbr of Days in Stock This Year (g)	766
107	Top Products by Nmbr of Days in Stock This Year, Prod Line sliced (g)	767
108	Top Products by Nmbr of Inventory Transactions This Year (g)	768
109	Top Products by Nmbr of Inventory Transactions This Year , Prod Line sliced (g)	769
110	Top Products by Nmbr of Item Transfers Last Days (g)	770
111	Top Products by Nmbr of Item Transfers This Year (g)	771
112	Top Products by Qty OH Today (g)	772
113	Top Product Categories by Cost OH Today (g)	773
114	Top Warehouses by Cost OH Today (g)	774

Note: For the purpose of calculating historical on-hand values, the out-of-the-box DataSelf BI system assumes that the inventory transactions have never been purged. Your DataSelf BI system may require adjusting entries. Please contact us for details.

## Inventory Projection Module

### Key Performance Indicators

1	Amt On Hand Today	775
2	Amt Open PO	776
3	Amt Open SO	777
4	Amt Sold	778
5	Qty On Hand Today	779
6	Qty Open PO	780
7	Qty Open SO	781
8	Qty Sold	782
9	Amt On Hand Projected End of Period	783
10	Amt onPO Accrued	784

11	Amt onSO Accrued	785
12	Qty Below Reorder Point	786
13	Qty On Hand Projected End of Period	787
14	Qty onPO Accrued	788
15	Qty onSO Accrued	789
16	Qty Reorder Point	790
<b>Dimensions, Hierarchies and Attributes</b>		
<b>Company</b>		
17	Company Id	791
18	Company Id Name	792
19	Company Name	793
<b>Activity Date</b>		
20	a Season	794
21	a Date	795
22	a Day of Period	796
23	a Day of Quarter	797
24	a Day of Week	798
25	a Day of Year	799
26	a Period	800
27	a Period Name	801
28	a Quarter	802
29	a Quarter Name	803
30	a Week	804
31	a Week of Year	805
32	a Year	806
33	Date	807
34	Period	808
35	Quarter	809
36	Rolling Half Year	810
37	Rolling Month	811
38	Rolling Quarter	812
39	Rolling Week	813
40	Rolling Year	814
41	td Period	815
42	td Quarter	816
43	td Year	817
44	Year	818
<b>Product</b>		
45	Product Description	819
46	Product Id	820
47	Product Id Description	821
48	Product Line/Cat/Class Description	822
49	Product Line/Cat/Class Id	823
50	Product Line/Cat/Class Id Description	824
51	Quantity On Hand	825
52	Unit Cost	826
53	Unit of Measure	827
54	Unit Price	828
<b>Warehouse</b>		
55	Warehouse Name	829
56	Warehouse Id	830
57	Warehouse Id Name	831
<b>Inventory Projection Reports</b>		
58	Amt OH Projection by Product	832
59	Amt OH Projection by Product and Warehouse	833
60	Amt OH Projection by Warehouse	834
61	Amt OH Projection by Warehouse and Product	835
62	Amt and Qty OH Projection Chart, Product sliced (g)	836
63	Amt and Qty OH Projection Chart, Prod Line sliced (g)	837
64	Amt and Qty OH Projection Chart, Warehouse sliced (g)	838

65	Amt Sold, on SO and Projected Chart, Product sliced (g)	839
66	Amt Sold, on SO and Projected Chart, Prod Line sliced (g)	840
67	Amt Sold, on SO and Projected Chart, Warehouse sliced (g)	841
68	Amt Sold, Projected, Accrued on PO and SO Chart, Product sliced (g)	842
69	Amt Sold, Projected, Accrued on PO and SO Chart, Prod Line sliced (g)	843
70	Amt Sold, Projected, Accrued on PO and SO Chart, Warehouse sliced (g)	844
71	Qty OH Projection by Product	845
72	Qty OH Projection by Product and Warehouse	846
73	Qty OH Projection by Warehouse	847
74	Qty OH Projection by Warehouse and Product	848
75	Qty Sold, Projected, Accrued on PO and SO Chart, Product sliced (g)	849
76	Qty Sold, Projected, Accrued on PO and SO Chart, Prod Line sliced (g)	850
77	Qty Sold, Projected, Accrued on PO and SO Chart, Warehouse sliced (g)	851
78	Qty Sold, on SO and Projected Chart, Products sliced (g)	852
79	Qty Sold, on SO and Projected Chart, Prod Line sliced (g)	853
80	Qty Sold, on SO and Projected Chart, Warehouse sliced (g)	854

## Inventory Replenishment Plan Module

It's easy to customize the Inventory Replenishment Planning Module for each a client's specific needs. For instance, decision-makers can plan inventory replenishment for any item over any period. The module works at any level of granularity, down to individual item numbers, item groups or even subgroups like color, size and style.

Users can choose to predict demand based on past sales, on sales forecasts from salespeople or customers, on market trends or even on a blend of metrics.

The solution integrates current data for inventory on hand, outstanding purchase or production orders outstanding sales orders, forecasted demand and reorder parameters. For reordering, it can take into account parameters like minimum quantity on hand, minimum reorder quantity and lead time per item.

If the solution determines that any items may run short or become overstocked, it alerts the user with the details. The system also tells what day a purchase order or work order should be placed. Users can monitor inventory by location or by business unit. They can also adjust parameters and see instantly what effect their adjustments would have in any period.

### Example of Key Performance Indicators

1	Quantity on Hand Today	855
2	Quantity Outstanding on PO by Receiving Date	856
3	Quantity Outstanding on SO by Shipping Date	857
4	Projected Quantity to Ship by Shipping Date	858
5	Minimum On Hand Quantity	859
6	Minimum Reorder Quantity	860
7	Expected Lead Time	861
8	Projected Quantity to Order	862

### Example of Dimensions, Hierarchies and Attributes

9	Company	863
10	Expected Receiving Date	864
11	Expected PO Date	865
12	Product	866
13	Product Class/Cat/Line	867
14	Vendor	868
15	Warehouse	869

## Purchase Order Module

### Key Performance Indicators

1	Amt Ordered	870
2	Amt Ordered Growth from Prior Period	871
3	Amt Outstanding	872
4	Amt Received	873
5	Avg Amt Ordered per PO	874
6	Avg Amt Unit Cost Received	875
7	Avg Nmbr of Days to Receive	876
8	Avg Nmbr of PO Headers per Day	877
9	Avg Qty Ordered per PO	878
10	Nmbr of PO Headers	879



11	Nmbr of PO Lines	880
12	Qty Ordered	881
13	Qty Ordered Growth from Prior Period	882
14	Qty Outstanding	883
15	Qty Received	884
<b>Dimensions, Hierarchies and Attributes</b>		
<b>Company</b>		
16	Company Id	885
17	Company Id Name	886
18	Company Name	887
<b>Date Required</b>		
19	a Season	888
20	a Date	889
21	a Day of Period	890
22	a Day of Quarter	891
23	a Day of Week	892
24	a Day of Year	893
25	a Period	894
26	a Period Name	895
27	a Quarter	896
28	a Quarter Name	897
29	a Week	898
30	a Week of Year	899
31	a Year	900
32	Date	901
33	Period	902
34	Quarter	903
35	Rolling Half Year	904
36	Rolling Month	905
37	Rolling Quarter	906
38	Rolling Week	907
39	Rolling Year	908
40	td Period	909
41	td Quarter	910
42	td Year	911
43	Year	912
<b>Product</b>		
44	Product Description	913
45	Product Id	914
46	Product Id Description	915
47	Product Line/Cat/Class Description	916
48	Product Line/Cat/Class Id	917
49	Product Line/Cat/Class Id Description	918
50	Quantity On Hand	919
51	Unit Cost	920
52	Unit of Measure	921
53	Unit Price	922
<b>PO Line</b>		
54	Date Required	923
55	Days Late	924
56	Document Date	925
57	Document Number	926
58	PO Status	927
59	PO Type	928
60	Product	929
61	Product Cat/Class/Line	930
62	UoM Conversion Factor	931
63	Vendor	932
64	Warehouse	933
<b>Vendor</b>		

65	Payment Terms	934
66	Vendor Name	935
67	Vendor Id	936
68	Vendor Id Name	937
	<b>Warehouse</b>	
69	Warehouse Id	938
70	Warehouse Id Name	939
71	Warehouse Name	940
	<b>Open PO Details Reports</b>	
72	Open PO Details for a Period by Product and Vendor	941
73	Open PO Details for a Period by Product and Warehouse	942
74	Open PO Details for a Period by Product, Warehouse sliced	943
75	Open PO Details for a Period by Vendor and Product	944
76	Open PO Details for a Period by Warehouse and Product	945
77	Open PO Details for a Period by Warehouse, Product sliced	946
	<b>Reports by Product</b>	
78	Avg Amt and Qty Ordered per PO by Product	947
79	Avg Amt and Qty Ordered per PO by Product and Vendor	948
80	Avg Nmbr of Days to Receive by Product	949
81	Avg Nmbr of Days to Receive by Product and Vendor	950
82	Avg Nmbr of PO Headers per Day by Product	951
83	Avg Nmbr of PO Headers per Day by Product and Vendor	952
84	Avg Unit Cost Received by Product	953
85	Avg Unit Cost Received by Product and Vendor	954
86	Avg Unit Cost Received by Product and Warehouse	955
87	Open POs by Product	956
88	Open POs by Product and Vendor	957
89	Open POs by Product and Warehouse	958
90	Open POs by Product, Required Date and Status	959
91	Open POs by Product, Vendor, Required Date and Status	960
92	PO Headers: Nmbr and Avg Amt Ordered per Required Period (g)	961
93	PO Headers: Nmbr and Avg Amt Ordered per Required Period, Product sliced (g)	962
94	Qty Ordered Growth from Prior Period by Product	963
95	Qty Ordered Growth from Prior Period by Product and Vendor	964
	<b>Top and Bottom Performers Reports</b>	
96	Bottom Products by Avg Nmbr of Days to Receive This Year (g)	965
97	Bottom Vendors by Avg Nmbr of Days to Receive This Year (g)	966
98	Top Products by Amt Ordered (g)	967
99	Top Products by Amt Ordered Growth from Prior Period (g)	968
100	Top Products by Amt Outstanding (g)	969
101	Top Products by Nmbr of Open PO Headers (g)	970
102	Top Products by Nmbr of Open PO Headers and Avg Amt Ordered (g)	971
103	Top Products by Nmbr of Open PO Headers and Avg Amt Ordered	972
104	Top Products by Qty Ordered	973
105	Top Products by Qty Ordered Growth from Prior Period	974
106	Top Products by Qty Outstanding	975
107	Top Vendors by Amt Outstanding	976
108	Top Vendors by Amt Ordered	977
109	Top Vendors by Amt Ordered Growth from Prior Period	978
110	Top Vendors by Nmbr of Open PO Headers	979
111	Top Vendors by Nmbr of Open PO Headers and Avg Amt Ordered (g)	980
112	Top Vendors by Nmbr of Open PO Headers and Avg Amt Ordered	981
	<b>Reports by Vendor</b>	
113	Avg Amt and Qty Ordered per PO by Vendor	982
114	Avg Amt and Qty Ordered per PO by Vendor and Product	983
115	Avg Nmbr of Days to Receive by Vendor	984
116	Avg Nmbr of Days to Receive by Vendor and Product	985
117	Avg Nmbr of PO Headers per Day by Vendor	986
118	Avg Nmbr of PO Headers per Day by Vendor and Product	987
119	Avg Unit Cost Received by Vendor	988

120	Avg Unit Cost Received by Vendor and Product	989
121	Open POs by Vendor	990
122	Open POs by Vendor and Product	991
123	Open POs by Vendor and Warehouse	992
124	Open POs by Vendor, Product, Required Date and Status	993
125	PO Headers: Nmbr and Avg Amt Ordered per Required Period, Vendor sliced (g)	994
126	Qty Ordered Growth from Prior Period by Vendor	995
127	Qty Ordered Growth from Prior Period by Vendor and Product	996
<b>Reports by Warehouse</b>		
128	Avg Amt and Qty Ordered per PO by Warehouse	997
129	Avg Nmbr of Days to Receive by Warehouse and Product	998
130	Avg Unit Cost Received by Warehouse and Product	999
131	Open POs by Warehouse	1000
132	Open POs by Warehouse and Product	1001
133	Open POs by Warehouse and Vendor	1002
134	Open POs by Warehouse Product, Required Date and Status	1003
135	PO Headers: Nmbr and Avg Amt Ordered per Required Period, Whse sliced (g)	1004

## Payables Module

### Key Performance Indicators

1	Amt Balance	1005
2	Amt Balance Accrued	1006
3	Amt Discount	1007
4	Amt Invoiced	1008
5	Amt Paid	1009
6	Avg Amt Balance per Document	1010
7	Avg Amt Balance per Vendor	1011
8	Avg Amt Invoiced per Document	1012
9	Avg Amt Invoiced per Vendor	1013
10	Nmbr of Documents	1014
11	Nmbr of Unique Vendors	1015

### Dimensions, Hierarchies and Attributes

#### Company

12	Company Id	1016
13	Company Id Name	1017
14	Company Name	1018

#### Date Due

15	a Season	1019
16	a Date	1020
17	a Day of Period	1021
18	a Day of Quarter	1022
19	a Day of Week	1023
20	a Day of Year	1024
21	a Period	1025
22	a Period Name	1026
23	a Quarter	1027
24	a Quarter Name	1028
25	a Week	1029
26	a Week of Year	1030
27	a Year	1031
28	Date	1032
29	Period	1033
30	Quarter	1034
31	Rolling Half Year	1035
32	Rolling Month	1036
33	Rolling Quarter	1037
34	Rolling Week	1038
35	Rolling Year	1039
36	td Period	1040
37	td Quarter	1041

38	td Year	1042
39	Year	1043
	<b>Payables Line</b>	
40	Days Late	1044
41	Document Date	1045
42	Document Number	1046
43	Due Date	1047
44	Payment Status	1048
45	Vendor	1049
	<b>Vendor</b>	
46	Payment Terms	1050
47	Vendor Name	1051
48	Vendor Id	1052
49	Vendor Id Name	1053
	<b>Payables Reports</b>	
50	Accrued Balance by Date Due (g)	1054
51	Accrued Balance Due This Year by Vendor, Pie Chart Top 0 (g)	1055
52	Amt Paid by Period Due (g)	1056
53	Amt Paid Due This Year by Vendor, Pie Chart Top 0 (g)	1057
54	Avg -Balance-per-Document by Period Due	1058
55	Avg -Balance-per-Document by Vendor	1059
56	Avg -Balance-per-Vendor by Period Due (g)	1060
57	Balance and Balance Accrued by Vendor and Period Due	1061
58	Balance by Aging Status (g)	1062
59	Balance by Aging Status and Vendor	1063
60	Balance by Date Due (g)	1064
61	Balance by Period Due (g)	1065
62	Balance by Vendor	1066
63	Balance Accrued by Vendors	1067
64	Nmbr of Documents by Period Due (g)	1068
65	Nmbr of Vendors with Payables by Period Due	1069
66	Payables Details: Due Date, Vendor, Doc Date, Doc Nmbr, Date Due sliced	1070
67	Payables Details: Vendor, Doc Date, Due Date, Date Due sliced	1071
68	Payables Details: Paymt Status, Vendor, Doc Date, Doc Nmbr, Date Due	1072
69	Payables Details: Vendor, Doc Date, Doc Nmbr, Date Due, Date Due sliced	1073
70	Payables Metrics by Vendor and Year Due	1074
71	Stacked Amt Paid by Period Due and Top -Vendors- by -Balance (g)	1075
72	Stacked Balance by Period Due and Top -Vendors- by -Balance (g)	1076
73	Top Vendors by Amt Invoiced (Due This Year ) (g)	1077
74	Top Vendors by Amt Paid(Due This Year ) (g)	1078
75	Top Vendors by Avg -Balance-per-Document(Due This Year ) (g)	1079
76	Top Vendors by Balance(Due This Year ) (g)	1080
77	Top Vendors by Nmbr of Documents (Due This Year ) (g)	1081
78	Top Vendors by Nmbr of Documents (Due This Year ) and Avg Amt Invoiced (g)	1082
79	Top Vendors by Nmbr of Documents (Due This Year ) and Avg Amt Invoiced	1083

Note: Accounting systems vary in how much payment history data is included with the open payables records.

## Project/Job Costing Module

### Key Performance Indicators

1	Actual Cost	1084
2	Actual Profit	1085
3	Actual Qty	1086
4	Actual Sales	1087
5	Actual Work Time	1088
6	Billable Time Available	1089
7	Billable Work Time	1090
8	Billed Cost	1091
9	Billed Sales	1092
10	Cost to Complete	1093
11	Estimated Cost	1094

12	Estimated Profit	1095
13	Estimated Qty	1096
14	Estimated Sales	1097
15	Estimated Work Time	1098
16	Percent Complete by Job	1099
17	Ratio of Billable versus Total Time	1100
18	Sales to Complete	1101
19	Unbilled Cost	1102
20	Unbilled Sales	1103
21	Unbilled Work Time	1104
<b>Dimensions, Hierarchies and Attributes</b>		
<b>Company</b>		
22	Company Id	1105
23	Company Id Name	1106
24	Company Name	1107
<b>Customer</b>		
25	Account Manager	1108
26	Credit Limit	1109
27	Credit On Hold	1110
28	Customer Group/Type	1111
29	Customer Id	1112
30	Customer Id Name	1113
31	Customer Name	1114
32	Customer Address	1115
33	Customer City	1116
34	Customer State	1117
35	Customer Zip/PC	1118
36	Customer Country	1119
37	Days in Business with Us	1120
38	Division	1121
39	National Account	1122
40	Payment Terms	1123
41	Territory	1124
<b>Estimated Start Date</b>		
42	a Season	1125
43	a Date	1126
44	a Day of Period	1127
45	a Day of Quarter	1128
46	a Day of Week	1129
47	a Day of Year	1130
48	a Period	1131
49	a Period Name	1132
50	a Quarter	1133
51	a Quarter Name	1134
52	a Week	1135
53	a Week of Year	1136
54	a Year	1137
55	Date	1138
56	Period	1139
57	Quarter	1140
58	Rolling Half Year	1141
59	Rolling Month	1142
60	Rolling Quarter	1143
61	Rolling Week	1144
62	Rolling Year	1145
63	td Period	1146
64	td Quarter	1147
65	td Year	1148
66	Year	1149
<b>Actual Start Date</b>		

67	a Season	1150
68	a Date	1151
69	a Day of Period	1152
70	a Day of Quarter	1153
71	a Day of Week	1154
72	a Day of Year	1155
73	a Period	1156
74	a Period Name	1157
75	a Quarter	1158
76	a Quarter Name	1159
77	a Week	1160
78	a Week of Year	1161
79	a Year	1162
80	Date	1163
81	Period	1164
82	Quarter	1165
83	Rolling Half Year	1166
84	Rolling Month	1167
85	Rolling Quarter	1168
86	Rolling Week	1169
87	Rolling Year	1170
88	td Period	1171
89	td Quarter	1172
90	td Year	1173
91	Year	1174
	<b>Estimated Completion Date</b>	
92	a Season	1175
93	a Date	1176
94	a Day of Period	1177
95	a Day of Quarter	1178
96	a Day of Week	1179
97	a Day of Year	1180
98	a Period	1181
99	a Period Name	1182
100	a Quarter	1183
101	a Quarter Name	1184
102	a Week	1185
103	a Week of Year	1186
104	a Year	1187
105	Date	1188
106	Period	1189
107	Quarter	1190
108	Rolling Half Year	1191
109	Rolling Month	1192
110	Rolling Quarter	1193
111	Rolling Week	1194
112	Rolling Year	1195
113	td Period	1196
114	td Quarter	1197
115	td Year	1198
116	Year	1199
	<b>Actual Completion Date</b>	
117	a Season	1200
118	a Date	1201
119	a Day of Period	1202
120	a Day of Quarter	1203
121	a Day of Week	1204
122	a Day of Year	1205
123	a Period	1206
124	a Period Name	1207

125	a Quarter	1208
126	a Quarter Name	1209
127	a Week	1210
128	a Week of Year	1211
129	a Year	1212
130	Date	1213
131	Period	1214
132	Quarter	1215
133	Rolling Half Year	1216
134	Rolling Month	1217
135	Rolling Quarter	1218
136	Rolling Week	1219
137	Rolling Year	1220
138	td Period	1221
139	td Quarter	1222
140	td Year	1223
141	Year	1224
	<b>Project/Cost</b>	
142	Department	1225
143	Job/Project Id	1226
144	Job/Project Id Description	1227
145	Job/Project Status	1228
146	Job/Project Type	1229
147	Worker Id	1230
148	Worker Id Name	1231
149	Worker Name	1232
	<b>Reports by Company</b>	
150	Actual vs. Estimated Analysis by Customer	1233
151	Actual vs. Estimated Analysis by Customer Region	1234
152	Actual vs. Estimated Analysis by Customer Type	1235
153	Actual vs. Estimated Analysis by Job	1236
154	Actual vs. Estimated Analysis by Job Type	1237
155	Actual vs. Estimated Analysis by Cost Type	1238
156	Actual vs. Estimated Analysis by Start/End Date	1239
157	Cost and Qty Analysis by Customer	1240
158	Cost and Qty Analysis by Customer Region	1241
159	Cost and Qty Analysis by Customer Type	1242
160	Cost and Qty Analysis by Job	1243
161	Cost and Qty Analysis by Job Type	1244
162	Cost and Qty Analysis by Cost Type	1245
163	Cost and Qty Analysis by Start/End Date	1246
164	Profitability Analysis by Customer	1247
165	Profitability Analysis by Customer Region	1248
166	Profitability Analysis by Customer Type	1249
167	Profitability Analysis by Job	1250
168	Profitability Analysis by Job Type	1251
169	Profitability Analysis by Cost Type	1252
170	Profitability Analysis by Start/End Date	1253
171	Utilization by Customer Region	1254
172	Utilization by Department/Division	1255
173	Utilization by Job	1256
174	Utilization by Worker	1257

## Receivables Module

### Key Performance Indicators

1	Amt Balance	1258
2	Amt Balance Accrued	1259
3	Amt Discount	1260
4	Amt Invoiced	1261
5	Amt Paid	1262

6	Amt Received	1263
7	Amt Received Accrued	1264
8	Amt Sales Tax	1265
9	Avg Amt Balance per Customer	1266
10	Avg Amt Balance per Document	1267
11	Avg Amt Invoiced per Customer	1268
12	Avg Amt Invoiced per Document	1269
13	Avg Nmbr of Days to Receive	1270
14	Nmbr of Documents	1271
15	Nmbr of Unique Customers	1272

**Dimensions, Hierarchies and Attributes**

**Company**

16	Company Id	1273
17	Company Id Name	1274
18	Company Name	1275

**Customer**

19	Account Manager	1276
20	Credit Limit	1277
21	Credit On Hold	1278
22	Customer Group/Type	1279
23	Customer Id	1280
24	Customer Id Name	1281
25	Customer Name	1282
26	Customer Address	1283
27	Customer City	1284
28	Customer State	1285
29	Customer Zip/PC	1286
30	Customer Country	1287
31	Days in Business with Us	1288
32	Division	1289
33	National Account	1290
34	Payment Terms	1291
35	Territory	1292

**Date Due**

36	a Season	1293
37	a Date	1294
38	a Day of Period	1295
39	a Day of Quarter	1296
40	a Day of Week	1297
41	a Day of Year	1298
42	a Period	1299
43	a Period Name	1300
44	a Quarter	1301
45	a Quarter Name	1302
46	a Week	1303
47	a Week of Year	1304
48	a Year	1305
49	Date	1306
50	Period	1307
51	Quarter	1308
52	Rolling Half Year	1309
53	Rolling Month	1310
54	Rolling Quarter	1311
55	Rolling Week	1312
56	Rolling Year	1313
57	td Period	1314
58	td Quarter	1315
59	td Year	1316
60	Year	1317

**Receivables Line**



61	Aging Status	1318
62	Customer	1319
63	Customer PO Number	1320
64	Document Date	1321
65	Due Date	1322
66	Days Late	1323
67	Document Amt Size	1324
68	Document Number	1325
69	Document Type	1326
70	Payment Status	1327
71	Payment Terms	1328
72	Salesperson	1329
	<b>Salesperson</b>	
73	Salesperson Id	1330
74	Salesperson Id Name	1331
75	Salesperson Name	1332
	<b>Reports by Company</b>	
76	Amt Balance	1333
77	Amt Balance Accrued	1334
78	Amt Discount	1335
79	Amt Invoiced	1336
80	Amt Paid	1337
81	Amt Received	1338
82	Amt Received Accrued	1339
83	Amt Sales Tax	1340
84	Avg Amt Balance per Customer	1341
85	Avg Amt Balance per Document	1342
86	Avg Amt Invoiced per Customer	1343
87	Avg Amt Invoiced per Document	1344
88	Avg Nmbr of Days to Receive	1345
89	Nmbr of Documents	1346
90	Nmbr of Unique Customers	1347
	<b>Reports by Customer</b>	
91	Accrued Balance Due This Year by Customer , Pie Chart Top 0 (g)	1348
92	Accrued Balance Due This Year by Customer Region, Pie Chart (g)	1349
93	Amt Received Due This Year by Customer , Pie Chart Top 0 (g)	1350
94	Amt Received Due This Year by Customer Region, Pie Chart (g)	1351
95	Avg -Amt-Invoiced-per- Customer by Due Period (g)	1352
96	Avg -Balance-per- Customer by Period Due (g)	1353
97	Avg -Balance-per-Documents by Customer	1354
98	Avg -Balance-per-Documents by Customer Region	1355
99	Avg -Nmbr- of -Days-to-Receive by Customer , Paid Invoices	1356
100	Avg -Nmbr- of -Days-to-Receive and Balance by Customer	1357
101	Balance by Aging Status and Customer	1358
102	Balance by Aging Status and Customer Region	1359
103	Balance by Customer	1360
104	Balance by Customer Region	1361
105	Balance and Balance Accrued by Customer and Period Due	1362
106	Balance and Balance Accrued by Customer Region and Period Due	1363
107	Nmbr of Customers with Receivables by Period Due (g)	1364
108	Nmbr of Customers with Receivables by Period Due, Customer Region sliced (g)	1365
109	Nmbr of Customers with Receivables by Period Due, Salespeople sliced (g)	1366
110	Nmbr of Documents by Customer Region and Due Period (g)	1367
111	Nmbr of Unique Customers by Due Period (g)	1368
112	Receivables Metrics by Customer and Year Due	1369
113	Receivables Metrics by Customer Region and Year Due	1370
114	Stacked Amt Balance Accumulated by Period Due and Customer Regions (g)	1371
115	Stacked Amt Received Accumulated by Period Due and Customer Regions (g)	1372
	<b>Receivables Details Reports</b>	
116	Receivables Details: Customer , Doc Date, Doc Nmbr, Date Due, Date Due sliced	1373

117	Receivables Details: Date Due, Customer , Doc Date, Doc Nmbr, Date Due sliced	1374
118	Receivables Details: Salesperson, Customer , Doc Date, Doc Nmbr, Date Due	1375
119	Receivables Details: Salesperson, Doc Date, Doc Nmbr, Date Due	1376
<b>Reports by Salesperson</b>		
120	Accrued Balance Due This Year by Salesperson, Pie Chart (g)	1377
121	Amt Received Due This Year by Salesperson, Pie Chart	1378
122	Avg -Amt-Invoiced-per- Customer and Balance by Salesperson	1379
123	Avg -Balance-per-Document by Salesperson	1380
124	Avg -Nmbr- of -Days-to-Receive by Salesperson, Paid Invoices	1381
125	Avg -Nmbr- of -Days-to-Receive and Balance by Salesperson	1382
126	Balance by Aging Status and Salesperson	1383
127	Balance by Salesperson	1384
128	Balance and Balance Accumulated by Salesperson and Period Due	1385
129	Nmbr of Documents by Salesperson and Due Period (g)	1386
130	Nmbr of Unique Customers by Salesperson and Due Period (g)	1387
131	Receivables Metrics by Salesperson and Year Due	1388
132	Stacked Amt Balance by Period Due and Salespeople (g)	1389
133	Stacked Amt Balance Accumulated by Period Due and Salespeople (g)	1390
134	Stacked Amt Received Accumulated by Period Due and Salespeople (g)	1391
135	Stacked Amt Received by Period Due and Salespeople (g)	1392
<b>Top and Bottom Performers Reports</b>		
136	Stacked Balance by Period Due and Top - Customers - by -Balance (g)	1393
137	Stacked Balance Accrued by Period Due and Top - Customers - by -Balance (g)	1394
138	Stacked Amt Received by Period Due and Top - Customers - by -Balance (g)	1395
139	Stacked Amt Received Accrued by Period Due and Top-Customers-by-Balance	1396
140	Top Customers by Amt Invoiced (Due This Year ) (g)	1397
141	Top Customers by Amt Invoiced and Avg -Nmbr- of -Days-to-Receive	1398
142	Top Customers by Amt Invoiced and Avg -Nmbr- of -Days-to-Receive (g)	1399
143	Top Customers by Amt Received (Due This Year ) (g)	1400
144	Top Customers by Avg -Balance-per-Document(Due This Year ) (g)	1401
145	Top Customers by Balance(Due This Year ) (g)	1402
146	Top Customers by Nmbr- of -Documents (Due This Year ) (g)	1403
147	Top Customer Regions by Amt Invoiced (Due This Year ) (g)	1404
148	Top Customer Regions by Amt Received (Due This Year ) (g)	1405
149	Top Customer Regions by Balance(Due This Year ) (g)	1406
150	Top Customers by Nmbr-of-Documents & Avg Amt Invoiced per Doc	1407
151	Top Customers by Nmbr-of-Documents & Avg Amt Invoiced per Doc (g)	1408
152	Top Salespeople by Amt Invoiced (Due This Year ) (g)	1409
153	Top Salespeople by Amt Received (Due This Year ) (g)	1410
154	Top Salespeople by Balance(Due This Year ) (g)	1411

Notes: Accounting systems vary in how much payment history is included within the open receivable records. The validity of the Average Days to Receive calculation is dependent on the availability of historical payment records.

## Sales Module

### Key Performance Indicators

1	a Amt Sales DayOfPer-ToDate	1412
2	a Amt Sales Same Season Prior Year	1413
3	a Amt Sales To Date Growth from Same Season Prior Year	1414
4	a Amt Sales To Date Same Season Prior Year	1415
5	a Amt Sales To Date This Season	1416
6	a Pct Sales To Date Growth from Same Season Prior Year	1417
7	Amt Cost of Sales	1418
8	Amt Discount H	1419
9	Amt Gross Profit	1420
10	Amt Gross Profit Growth from Prior PTD	1421
11	Amt Gross Profit Growth from Prior QTD	1422
12	Amt Gross Profit Growth from Prior YTD	1423
13	Amt Gross Profit Prior PTD	1424
14	Amt Gross Profit Prior QTD	1425
15	Amt Gross Profit Prior YTD	1426

16	Amt Gross Profit PTD	1427
17	Amt Gross Profit QTD	1428
18	Amt Gross Profit YTD	1429
19	Amt Returned	1430
20	Amt Returned YTD	1431
21	Amt Sales	1432
22	Amt Sales Growth from Prior Period	1433
23	Amt Sales Growth from Prior PTD	1434
24	Amt Sales Growth from Prior QTD	1435
25	Amt Sales Growth from Prior Quarter	1436
26	Amt Sales Growth from Prior Rolling Half Year	1437
27	Amt Sales Growth from Prior Rolling Month	1438
28	Amt Sales Growth from Prior Rolling Quarter	1439
29	Amt Sales Growth from Prior Rolling Week	1440
30	Amt Sales Growth from Prior Rolling Year	1441
31	Amt Sales Growth from Prior Year	1442
32	Amt Sales Growth from Prior YTD	1443
33	Amt Sales Growth from Same Period Prior Year	1444
34	Amt Sales Prior Period	1445
35	Amt Sales Prior PTD	1446
36	Amt Sales Prior QTD	1447
37	Amt Sales Prior Quarter	1448
38	Amt Sales Prior Year	1449
39	Amt Sales Prior YTD	1450
40	Amt Sales PTD	1451
41	Amt Sales QTD	1452
42	Amt Sales Same Period Prior Year	1453
43	Amt Sales Tax H	1454
44	Amt Sales YTD	1455
45	Avg Amt Discount per Invoice	1456
46	Avg Amt Sales 3-Rolling Months	1457
47	Avg Amt Sales 3-Rolling Quarters	1458
48	Avg Amt Sales 3-Rolling Weeks	1459
49	Avg Amt Sales per Day	1460
50	Avg Amt Sales per Invoice	1461
51	Avg Amt Sales per Period	1462
52	Avg Amt Sales per Quarter	1463
53	Avg Amt Unit Price Sold	1464
54	Avg Nmbr of Days between Sales	1465
55	Avg Nmbr of Invoices per Period	1466
56	Avg Qty Sold per Day	1467
57	Avg Qty Sold per Invoice	1468
58	Avg Qty Sold per Period	1469
59	Avg Qty Sold per Quarter	1470
60	Customer Group Large By Sales Amt Volume	1471
61	Customer Group Small By Sales Amt Volume	1472
62	Flags Amt Sales and Growth Prior Period	1473
63	Nmbr of Activity Days H	1474
64	Nmbr of Periods	1475
65	Nmbr of Quarters	1476
66	Nmbr of Sales Headers H	1477
67	Nmbr of Sales Lines	1478
68	Nmbr of Unique Customers H	1479
69	Nmbr of Unique Products	1480
70	Nmbr of Unique Salespeople H	1481
71	Nmbr of Work Days	1482
72	Pct Avg Sales Growth from Prior 3-Rolling Months	1483
73	Pct Avg Sales Growth from Prior 3-Rolling Quarters	1484
74	Pct Avg Sales Growth from Prior 3-Rolling Weeks	1485
75	Pct Gross Profit	1486

76	Pct Gross Profit Growth from Prior PTD	1487
77	Pct Gross Profit Growth from Prior QTD	1488
78	Pct Gross Profit Growth from Prior YTD	1489
79	Pct Qty Sold Growth from Prior Period	1490
80	Pct Qty Sold Growth from Prior PTD	1491
81	Pct Qty Sold Growth from Prior QTD	1492
82	Pct Qty Sold Growth from Prior YTD	1493
83	Pct Qty Sold Growth from Same Period Prior Year	1494
84	Pct Sales Growth from Prior Period	1495
85	Pct Sales Growth from Prior PTD	1496
86	Pct Sales Growth from Prior QTD	1497
87	Pct Sales Growth from Prior Rolling Half Year	1498
88	Pct Sales Growth from Prior Rolling Month	1499
89	Pct Sales Growth from Prior Rolling Quarter	1500
90	Pct Sales Growth from Prior Rolling Week	1501
91	Pct Sales Growth from Prior Rolling Year	1502
92	Pct Sales Growth from Prior YTD	1503
93	Pct Sales Growth from Same Period Prior Year	1504
94	Product Group Large By Sales Amt Volume	1505
95	Product Group Small By Sales Amt Volume	1506
96	Qty On Hand Today	1507
97	Qty On PO Today	1508
98	Qty On SO Today	1509
99	Qty Returned	1510
100	Qty Sold	1511
101	Qty Sold Growth from Prior Period	1512
102	Qty Sold Growth from Prior PTD	1513
103	Qty Sold Growth from Prior QTD	1514
104	Qty Sold Growth from Prior YTD	1515
105	Qty Sold Growth from Same Period Prior Year	1516
106	Qty Sold Prior Period	1517
107	Qty Sold Prior PTD	1518
108	Qty Sold Prior QTD	1519
109	Qty Sold Prior YTD	1520
110	Qty Sold PTD	1521
111	Qty Sold QTD	1522
112	Qty Sold Same Period Prior Year	1523
113	Qty Sold in Unit of Measure	1524
114	Qty Sold YTD	1525
115	td Avg Amt Sales per Day	1526
116	td Avg Amt Sales per Month	1527
117	td Avg Nmbr of Days between Sales	1528
118	td Avg Qty Sold per Day	1529
119	td Avg Qty Sold per Month	1530

**Dimensions, Hierarchies and Attributes**

**Company**

120	Company Id	1531
121	Company Id Name	1532
122	Company Name	1533

**Customer**

123	Account Manager	1534
124	Credit Limit	1535
125	Credit On Hold	1536
126	Customer Group/Type	1537
127	Customer Id	1538
128	Customer Id Name	1539
129	Customer Name	1540
130	Customer Address	1541
131	Customer City	1542
132	Customer State	1543

133	Customer Zip/PC	1544
134	Customer Country	1545
135	Days in Business with Us	1546
136	Division	1547
137	National Account	1548
138	Payment Terms	1549
139	Territory	1550
	<b>Document Date</b>	
140	a Season	1551
141	a Date	1552
142	a Day of Period	1553
143	a Day of Quarter	1554
144	a Day of Week	1555
145	a Day of Year	1556
146	a Period	1557
147	a Period Name	1558
148	a Quarter	1559
149	a Quarter Name	1560
150	a Week	1561
151	a Week of Year	1562
152	a Year	1563
153	Date	1564
154	Period	1565
155	Quarter	1566
156	Rolling Half Year	1567
157	Rolling Month	1568
158	Rolling Quarter	1569
159	Rolling Week	1570
160	Rolling Year	1571
161	td Period	1572
162	td Quarter	1573
163	td Year	1574
164	Year	1575
	<b>Product</b>	
165	Product Description	1576
166	Product Id	1577
167	Product Id Description	1578
168	Product Line/Cat/Class Description	1579
169	Product Line/Cat/Class Id	1580
170	Product Line/Cat/Class Id Description	1581
171	Quantity On Hand	1582
172	Unit Cost	1583
173	Unit of Measure	1584
174	Unit Price	1585
	<b>Sales Header</b>	
175	Aging Status	1586
176	Customer	1587
177	Customer PO Number	1588
178	Document Date	1589
179	Due Date	1590
180	Days Late	1591
181	Document Amt Size	1592
182	Document Number	1593
183	Document Type	1594
184	Order Number	1595
185	Payment Status	1596
186	Payment Terms	1597
187	Salesperson	1598
	<b>Sales Line</b>	
188	Customer	1599

189	Document Date	1600
190	Document Number	1601
191	Document Type	1602
192	Product	1603
193	Product Class/Group/Line	1604
194	Salesperson	1605
195	Unit of Measure	1606
196	Warehouse	1607
	<b>Salesperson</b>	
197	Salesperson Id	1608
198	Salesperson Id Name	1609
199	Salesperson Name	1610
	<b>Ship-To</b>	
200	Customer Id Name	1611
201	Ship-To Address	1612
202	Ship-To City	1613
203	Ship-To Code/Name	1614
204	Ship-To Country	1615
205	Ship-To State	1616
206	Ship-To Zip/PC	1617
	<b>Warehouse</b>	
207	Warehouse Id	1618
208	Warehouse Id Name	1619
209	Warehouse Name	1620
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210	Accrued Daily Sales , Quarter Comparison, Company sliced (g)	1621
211	Accrued Daily Sales , Year Comparison, Company sliced (g)	1622
212	Accrued Monthly Sales , Company sliced	1623
213	Accrued Monthly Sales and Gross Profit , Company sliced (g)	1624
214	Monthly Sales & Gross Profit , Company sliced (g)	1625
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218	Monthly Sales by Company (g)	1629
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221	Monthly Sales and Sales Growth from Prior Period, Company sliced (g)	1632
222	Sales This YTD vs. Prior YTD , Company sliced (g)	1633
223	Decomposition Tree-Company Sales This Year	1634
224	Amt & Pct Sales Growth from Prior Period, Company sliced (g)	1635
225	Monthly Invoice Count, Company sliced (g)	1636
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228	Nmbr of Invoices & Sales by Invoice Size, Company sliced (g)	1639
229	Nmbr of Invoices , Amt & Pct Gross Profit by Invoice Size, Company sliced (g)	1640
230	Nmbr of Invoices , Sales & Gross Profit by Invoice Size, Company sliced (g)	1641
231	Nmbr of Unique Customers with Sales and Sales Size by Company (g)	1642
232	Nmbr of Unique Customers with Sales by Company (g)	1643
233	Nmbr of Unique Products Sold by Company (g)	1644
234	Nmbr of Unique Salespeople with Sales by Company (g)	1645
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237	Yearly Returns by Company (g)	1648
238	Yearly Gross Profit by Company (g)	1649
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240	Yearly Qty Sold and Avg Unit Price, Company sliced (g)	1651
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242	Yearly Sales and Sales Growth , Company sliced (g)	1653
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247	Nmbr of Invoices , Customer sliced (g)	1658
248	Nmbr of Invoices by Invoice Size, Customer sliced (g)	1659
249	Nmbr of Invoices and Sales Size, Customer sliced (g)	1660
250	Nmbr of Invoices and Gross Profit by Invoice Size, Customer sliced (g)	1661
251	Nmbr of Invoices and Sales by Invoice Size, Customer sliced (g)	1662
252	Nmbr of Invoices , Gross Profit Amt & Pct by Invoice Size, Customer sliced (g)	1663
253	Nmbr of Invoices , Sales and Gross Profit by Invoice Size, Customer sliced (g)	1664
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255	Nmbr of Unique Salespeople by Customer	1666

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261	Yearly Gross Profit by Customer	1672
262	Yearly Gross Profit Amt and Pct (g)	1673
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268	Accrued Daily Sales , Quarter Comparison, Customer sliced (g)	1679
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288	Sales by Customer and Product	1699
289	Sales by Customer and Product Line	1700
290	Sales by Customer , Product Line and Product	1701
291	Sales by Customer Type	1702
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293	Sales by Customer Type with Sales Growth Flags(f)	1704
294	Sales This Period vs. Prior Period, Customer sliced (g)	1705
295	Sales This Period vs. Same Period Prior Year , Customer sliced (g)	1706
296	Sales This YTD vs. Prior YTD , Customer sliced (g)	1707
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306	Customer Size by Quarter, Cst Region and Size sliced (g)	1717
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318	Nmbr of Unique Salespeople with Sales by Region (g)	1729
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322	Performance Map by Region- Sales and Gross Profit (g)	1733
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324	Sales This Period vs. Prior Period, Cst Region sliced (g)	1735
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326	Sales This Period vs. Same Period Prior Year , Cst Region sliced (g)	1737
327	Yearly Sales Share by Region (g)	1738
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329	Yearly Sales by Region (g)	1740
330	Yearly Sales and Sales Growth , Cst Region sliced (g)	1741
331	Yearly Sales and Gross Profit , Cst Region sliced (g)	1742
332	Yearly Returns by Region (g)	1743
333	Yearly Qty Sold and Avg Unit Price, Cst Region sliced (g)	1744
334	Yearly Gross Profit Share by Region (g)	1745
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339	Accrued Monthly Sales by Territory, Measures sliced (g)	1750
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346	Monthly Invoice Count by Territory (g)	1757
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348	Monthly Sales and Gross Profit by Territory (g)	1759
349	Monthly Sales and Gross Profit Pct, Territory sliced (g)	1760
350	Monthly Sales and Sales Growth from Prior Period, Territory sliced (g)	1761
351	Monthly Sales by Territory (g)	1762
352	Monthly Sales Comparison by Territory (g)	1763
353	Nmbr of Invoices by Invoice Size and Territory (g)	1764
354	Nmbr of Invoices by Invoice Size and Territory, Measures sliced (g)	1765
355	Nmbr of Unique Salespeople with Sales by Territory (g)	1766



356	Nmbr of Unique Customers with Sales and Sales Size by Territory (g)	1767
357	Nmbr of Unique Customers with Sales by Territory (g)	1768
358	Nmbr of Unique Products Sold by Territory (g)	1769
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363	Sales This Period vs. Same Period Prior Year , Territory sliced (g)	1774
364	Yearly Sales Share by Territory (g)	1775
365	Yearly Sales , Gross Profit Amt and Pct, Territory sliced (g)	1776
366	Yearly Sales by Territory (g)	1777
367	Yearly Sales and Sales Growth , Territory sliced (g)	1778
368	Yearly Sales and Gross Profit , Territory sliced (g)	1779
369	Yearly Returns by Territory (g)	1780
370	Yearly Qty Sold and Avg Unit Price, Territory sliced (g)	1781
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375	Invoice Size and Sales , Product sliced (g)	1786
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377	Nmbr of Invoices , Product sliced (g)	1788
378	Nmbr of Invoices by Invoice Size, Product sliced (g)	1789
379	Nmbr of Invoices and Gross Profit by Invoice Size, Product sliced (g)	1790
380	Nmbr of Invoices and Sales Size, Product sliced (g)	1791
381	Nmbr of Invoices , Gross Profit Amt and Pct by Invoice Size, Product sliced (g)	1792
382	Nmbr of Invoices , Sales and Gross Profit by Invoice Size, Product sliced (g)	1793
383	Nmbr of Unique Customers by Product Sold	1794
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385	Accrued Monthly Sales and Gross Profit , Product sliced (g)	1796
386	Monthly Gross Profit Comparison, Product sliced (g)	1797
387	Monthly Sales and Gross Profit , Product sliced (g)	1798
388	Monthly Sales and Gross Profit Pct, Product sliced (g)	1799
389	Product Perspective- Avg Sales Amt per Invoice and Pct G P (g)	1800
390	Yearly Gross Profit by Product	1801
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395	Accrued Monthly Shipped, Product sliced (g)	1806
396	Monthly Return Amt, Product sliced (g)	1807
397	Monthly Qty Shipped and Shipped Growth from Prior Period, Product sliced (g)	1808
398	Monthly Qty Shipped by Product Line(g, s)	1809
399	Monthly Qty Shipped Comparison, Product sliced (g)	1810
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405	Accrued Daily Sales , Year Comparison, Product Line sliced (g)	1816
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408	Avg Monthly Sales Amt by Product	1819
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410	Products with Sales Last Days, No Sales Last Days	1821

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434	Nmbr of Invoices by Invoice Size and Salesperson	1845
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436	Nmbr of Invoices and Sales by Invoice Size, Salesperson sliced (g)	1847
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439	Nmbr of Invoices, Sales and GP by Invoice Size, Salesperson sliced (g)	1850
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552	Top Customers by Sales This Year with Sales Growth Flags(g, f)	1963
553	Top Customers by Sales Last YTD (g)	1964
554	Top Customers by Sales This YTD (g)	1965
555	Customers Representing 0% of Sales Last Year (g)	1966
556	Customers Representing 0% of Sales This Year (g)	1967
557	Customers Representing 0% of Gross Profit Last Year (g)	1968
558	Customers Representing 0% of Gross Profit This Year (g)	1969
<b>Products</b>		
559	Sales by Top Products This Year and Customer	1970
560	Sales of Top Products by Salesperson	1971
561	Sales of Top Products to Top Customers	1972
562	Stacked Accrued Sales by Top Products This Year by Period (g)	1973
563	Stacked Sales by Top Products This Year by Period (g)	1974
564	Stacked Sales by Top Products This Year by Customer Type (g)	1975
565	Stacked Sales by Top Products This Year by Top Customers (g)	1976
566	Top Products by Avg Monthly Sales Amt Decrease (\$000/mo)	1977
567	Top Products by Avg Nmbr of Days between Sales Decrease (days)	1978
568	Top Products by Nmbr of Invoices This Year (g)	1979
569	Top Products by Nmbr of Unique Customers This Year (g)	1980
570	Top Products by Qty Returned This Year (g)	1981
571	Top Products by Qty Shipped Decrease This Year vs. Prior Year (g)	1982
572	Top Products by Qty Shipped Increase This Year vs. Prior Year (g)	1983
573	Top Products by Qty Shipped Last Year (g)	1984
574	Top Products by Qty Shipped This Year (g)	1985
575	Top Products by Return Amt This Year (g)	1986
576	Top Products by Gross Profit Last Year (g)	1987
577	Top Products by Gross Profit This Year (g)	1988
578	Top Products by Negative Gross Profit Last Year (g)	1989
579	Top Products by Negative Gross Profit This Year (g)	1990

580	Top Products by Sales Amt Decrease This Year vs. Prior Year (g)	1991
581	Top Products by Sales Amt Decrease This YTD vs. Prior YTD (g)	1992
582	Top Products by Sales Amt Increase This Year vs. Prior Year (g)	1993
583	Top Products by Sales Amt Increase This YTD vs. Prior YTD (g)	1994
584	Top Products by Sales Last Year (g)	1995
585	Top Products by Sales This Year (g)	1996
586	Top Products by Sales This Year with Sales Growth Flags(g, f)	1997
587	Top Products by Sales Last YTD (g)	1998
588	Top Products by Sales This YTD (g)	1999
589	Products Representing 0% of Sales Last Year (g)	2000
590	Products Representing 0% of Sales This Year (g)	2001
591	Products Representing 0% of Gross Profit Last Year (g)	2002
592	Products Representing 0% of Gross Profit This Year (g)	2003
<b>Salespeople</b>		
593	Nmbr of Invoices by Invoice Size and Top Salespeople (g)	2004
594	Stacked Sales by Salesperson by Top Products (g)	2005
595	Top Salespeople by Gross Profit This Year (g)	2006
596	Top Salespeople by Nmbr of Invoices This Year (g)	2007
597	Top Salespeople by Nmbr of Large Invoices This Year (g)	2008
598	Top Salespeople by Nmbr of Small Invoices This Year (g)	2009
599	Top Salespeople by Nmbr of Unique Customers This Year (g)	2010
600	Top Salespeople by Nmbr of Unique Products This Year (g)	2011
601	Top Salespeople by Return Amt This Year (g)	2012
602	Top Salespeople by Sales Amt Decrease This Year vs. Prior Year (g)	2013
603	Top Salespeople by Sales Amt Decrease This YTD vs. Prior YTD (g)	2014
604	Top Salespeople by Sales Amt Increase This Year vs. Prior Year (g)	2015
605	Top Salespeople by Sales Amt Increase This YTD vs. Prior YTD (g)	2016
606	Top Salespeople by Sales Last Year (g)	2017
607	Top Salespeople by Sales This Year (g)	2018
608	Top Salespeople by Sales This Year with Sales Growth Flags(g, f)	2019
609	Top Salespeople by Sales Last YTD (g)	2020
610	Top Salespeople by Sales This YTD (g)	2021
<b>Advanced Analysis</b>		
611	Perspective- Customer , Sales and G P	2022
612	Perspective- Product, Sales and G P	2023
613	Decomposition Tree, Sales by Customer (g)	2024
614	Decomposition Tree, Sales by Customer Region (g)	2025
615	Decomposition Tree, Sales by Product (g)	2026
616	Decomposition Tree, Sales by Product Line (g)	2027
617	Decomposition Tree, Sales by Salespeople (g)	2028
618	Performance Map by Customer - Sales and Gross Profit (g)	2029
619	Performance Map by Customer - Sales and Nmbr of Invoices (g)	2030
620	Performance Map by Customer Type- Sales and Gross Profit (g)	2031
621	Performance Map by Customer Region- Sales and Gross Profit (g)	2032
622	Performance Map by Product- Sales and Gross Profit (g)	2033
623	Performance Map by Product- Sales and Nmbr of Invoices (g)	2034
624	Performance Map by Product Class- Sales and Gross Profit (g)	2035
625	Performance Map by Product Type- Sales and Gross Profit (g)	2036
626	Performance Map by Product Line- Sales and Gross Profit (g)	2037
627	Performance Map by Salesperson- Sales and Gross Profit (g)	2038
628	Performance Map by Salesperson- Sales and Nmbr of Invoices (g)	2039
629	Performance Map by Territory- Sales and Gross Profit (g)	2040

## Sales Commissions

Too many mid-size organizations spend hours and even days every month. The DataSelf BI Sales Commission Module automates the commission calculation process. Managers can usually generate commission reports — even progress reports — at any time.

Other advantages:

- The Sales Commissions Module can be easily customized for each client's specific needs.
- The module lets organizations calculate commissions immediately after month-end closing, not days or weeks later.

- The module avoids the many errors that hand-entry and excel manipulation introduce.
- Commissions are easier to check because memories are fresh.
- Progress reports help motivate salespeople by showing them commission totals to date.
- The module requires just a few hours to set up. After that, automation takes over most of the job.
- Commissions can be based on complex rules, and calculations can even combine data from the accounting system and other sources like Excel. Most rule changes can be made quickly.
- The commissions can be based on any combination of parameters, such as product category, items, dollar amounts, volume of units sold and promotions. It can calculate commissions based on invoiced amounts (at the invoice header and/or line item levels), or from actual payment received from clients, or a combination of similar factors.

**Example of Key Performance Indicators**

1	Actual Sales Amount	2041
2	Commission Amount by Salesperson	2042
3	Commission Amount by Field Rep	2043
4	Commission Amount by Sales Manager	2044
5	Commission Amount by Division Manager	2045
6	Commission Amount by Distributor	2046
7	Commission Amount by VAR	2047
8	Daily Accumulated Sales Amount	2048
9	Daily Accumulated Commission Amount by Salesperson	2049
10	Daily Accumulated Commission Amount by Field Rep	2050
11	Daily Accumulated Commission Amount by Sales Manager	2051
12	Daily Accumulated Commission Amount by Division Manager	2052
13	Daily Accumulated Commission Amount by Distributor	2053
14	Daily Accumulated Commission Amount by VAR	2054
15	Projected/Target Daily Accumulated Sales Amount	2055
16	Projected/Target Daily Accumulated Commission Amount by Salesperson	2056
17	Projected/Target Daily Accumulated Commission Amount by Field Rep	2057
18	Projected/Target Daily Accumulated Commission Amount by Sales Manager	2058
19	Projected/Target Daily Accumulated Commission Amount by Division Manager	2059
20	Projected/Target Daily Accumulated Commission Amount by Distributor	2060
21	Projected/Target Daily Accumulated Commission Amount by VAR	2061

**Example of Dimensions, Hierarchies and Attributes**

22	Company	2062
23	Customer	2063
24	Customer Class/Group/Type	2064
25	Document Date	2065
26	Product	2066
27	Product Class/Cat/Line	2067
28	Salesperson	2068
29	Warehouse	2069

**Example of Sales Commission Reports**

30	Actual Sales and Commissions by Customer	2070
31	Actual Sales and Commissions by Period	2071
32	Actual Sales and Commissions by Product	2072
33	Actual Sales and Commissions by Region	2073
34	Actual Sales and Commissions by Salesperson	2074
35	Actual Sales and Commissions by Territory	2075
36	Daily/Monthly Accrued Sales and Commissions by Customer	2076
37	Daily/Monthly Accrued Sales and Commissions by Product	2077
38	Daily/Monthly Accrued Sales and Commissions by Region	2078
39	Daily/Monthly Accrued Sales and Commissions by Salesperson	2079
40	Daily/Monthly Accrued Sales and Commissions by Territory	2080

**Sales Forecasting / Budgeting**

The Sales Forecasting/Budgeting Module can be easily customized to reflect each client's specific needs. For instance, when planning a sales forecast or budget for the coming year, the module can automatically start with annualized actuals from the current year. Year-over-year adjustments can be applied across-the-board and fine-tuned. For example, if a manager projects a 5% increase in sales, that increase can be filled in for the whole year. The change will propagate to every period and sub-account and can then be fine-tuned. If the first quarter will show a smaller increase, the manager can use the same automatic function to adjust increases by quarter.

Users can do forecasting and budgeting with any combination of sales parameters, such as salesperson, product

category, product and customer. Any kind of time buckets can be used, such as days, weeks or months.

The system can populate future budgeting and forecasting amounts based on prior actuals or from information from an outside source (like customer feedback) or a combination of both. Later, users are able to monitor actuals versus budgets for any time period. The system can also be set up to work with a large number of —official and —provisional budget/forecasting versions

Managers can easily restrict the view of any user. For instance, a sales representative can be limited to viewing only his own actual sales and updating his own provisional budget. Meanwhile, his sales manager would have a wider view of actual sales and update budgets for her whole West Coast sales team.

**Example of Key Performance Indicators**

1	Actual Sales Amount	2081
2	Actual Sales Amount Prior Period	2082
3	Actual Sales Amount This Period vs. Same Period Prior Year	2083
4	Actual Sales Amount YTD	2084
5	Budgeted/Forecast Sales amount	2085
6	Budgeted/Forecast Sales amount Prior Period	2086
7	Budgeted/Forecast Sales amount This Period vs. Same Period Prior Year	2087
8	Budgeted/Forecast Sales amount YTD	2088
9	Prov. 1 Budget/Forecast Sales Amount	2089
10	Prov. 1 Budget/Forecast Sales Amount Prior Period	2090
11	Prov. 1 Budget/Forecast Sales Amount This Period vs. Same Period Prior Year	2091
12	Prov. 1 Budget/Forecast Sales Amount YTD	2092
13	Prov. 2 Budget/Forecast Sales Amount	2093
14	Prov. 2 Budget/Forecast Sales Amount Prior Period	2094
15	Prov. 2 Budget/Forecast Sales Amount This Period vs. Same Period Prior Year	2095
16	Prov. 2 Budget/Forecast Sales Amount YTD	2096

**Example of Dimensions, Hierarchies and Attributes**

17	Company	2097
18	Customer	2098
19	Customer Class/Group/Type	2099
20	Document Date	2100
21	Product	2101
22	Product Class/Cat/Line	2102
23	Salesperson	2103
24	Warehouse	2104

**Example of Sales Commission Reports**

25	Actual and Forecast/Budget Sales by Customer	2105
26	Actual and Forecast/Budget Sales by Period	2106
27	Actual and Forecast/Budget Sales by Product	2107
28	Actual and Forecast/Budget Sales by Region	2108
29	Actual and Forecast/Budget Sales by Salesperson	2109
30	Actual and Forecast/Budget Sales by Territory	2110

**Sales Order Module**

**Key Performance Indicators**

1	Amt Cost on Hand	2111
2	Amt Discount	2112
3	Amt Invoiced	2113
4	Amt Invoiced plus Outstanding	2114
5	Amt Ordered	2115
6	Amt Ordered Cost of Sales	2116
7	Amt Ordered Gross Profit	2117
8	Amt Outstanding	2118
9	Amt Shipped	2119
10	Avg Amt Ordered per SO	2120
11	Avg Qty Ordered per SO	2121
12	Nmbr of SO Lines	2122
13	Nmbr of SO Headers	2123
14	Pct Gross Profit	2124
15	Qty Invoiced	2125
16	Qty Invoiced plus Outstanding	2126

17	Qty On Hand	2127
18	Qty Ordered	2128
19	Qty Outstanding	2129
20	Qty Shipped	2130
21	Amt Back Ordered ToDate	2131
22	Amt Outstanding ToDate	2132
23	Qty Back Ordered ToDate	2133
24	Qty Outstanding ToDate	2134
<b>Dimensions, Hierarchies and Attributes</b>		
<b>Company</b>		
25	Company Id	2135
26	Company Id Name	2136
27	Company Name	2137
<b>Customer</b>		
28	Account Manager	2138
29	Credit Limit	2139
30	Credit On Hold	2140
31	Customer Group/Type	2141
32	Customer Id	2142
33	Customer Id Name	2143
34	Customer Name	2144
35	Customer Address	2145
36	Customer City	2146
37	Customer State	2147
38	Customer Zip/PC	2148
39	Customer Country	2149
40	Days in Business with Us	2150
41	Division	2151
42	National Account	2152
43	Payment Terms	2153
44	Territory	2154
<b>Document Date</b>		
45	a Season	2155
46	a Date	2156
47	a Day of Period	2157
48	a Day of Quarter	2158
49	a Day of Week	2159
50	a Day of Year	2160
51	a Period	2161
52	a Period Name	2162
53	a Quarter	2163
54	a Quarter Name	2164
55	a Week	2165
56	a Week of Year	2166
57	a Year	2167
58	Date	2168
59	Period	2169
60	Quarter	2170
61	Rolling Half Year	2171
62	Rolling Month	2172
63	Rolling Quarter	2173
64	Rolling Week	2174
65	Rolling Year	2175
66	td Period	2176
67	td Quarter	2177
68	td Year	2178
69	Year	2179
<b>Expected Ship Date</b>		
70	a Season	2180
71	a Date	2181



72	a Day of Period	2182
73	a Day of Quarter	2183
74	a Day of Week	2184
75	a Day of Year	2185
76	a Period	2186
77	a Period Name	2187
78	a Quarter	2188
79	a Quarter Name	2189
80	a Week	2190
81	a Week of Year	2191
82	a Year	2192
83	Date	2193
84	Period	2194
85	Quarter	2195
86	Rolling Half Year	2196
87	Rolling Month	2197
88	Rolling Quarter	2198
89	Rolling Week	2199
90	Rolling Year	2200
91	td Period	2201
92	td Quarter	2202
93	td Year	2203
94	Year	2204
	<b>Product</b>	
95	Product Description	2205
96	Product Id	2206
97	Product Id Description	2207
98	Product Line/Cat/Class Description	2208
99	Product Line/Cat/Class Id	2209
100	Product Line/Cat/Class Id Description	2210
101	Quantity On Hand	2211
102	Unit Cost	2212
103	Unit of Measure	2213
104	Unit Price	2214
	<b>Sales Order Line</b>	
105	Customer	2215
106	Date Document	2216
107	Days Late	2217
108	Document Number	2218
109	Document Type	2219
110	Expected Ship Date	2220
111	On Time Flag	2221
112	Payment Terms	2222
113	Product	2223
114	Product Class/Cat/Line	2224
115	Salesperson	2225
116	SO Status	2226
117	Unit of Measure	2227
118	Warehouse	2228
	<b>Salesperson</b>	
119	Salesperson Id	2229
120	Salesperson Id Name	2230
121	Salesperson Name	2231
	<b>Warehouse</b>	
122	Warehouse Id	2232
123	Warehouse Id Name	2233
124	Warehouse Name	2234
	<b>Reports by Company</b>	
125	Amt Gross Profit by Required Date, Company sliced (g)	2235
126	Amt Outstanding and Back Ordered for Next Periods, Company sliced (g)	2236

127	Amt Outstanding by Required Date, Company sliced (g)	2237
128	Avg Order Amt by Company	2238
129	Sales History and Outstanding Orders by Required Date, Company sliced (g)	2239
	<b>Reports by Customer</b>	
130	Avg Order Amt by Customer	2240
131	Avg Order Amt by Customer and Product	2241
132	Open Orders by Customer and Days Late	2242
133	Open Orders by Customer , Product and Days Late, Measures sliced	2243
134	Open Orders by Customer and Required Date	2244
135	Open Orders by Customer , Product and Required Date, Measures sliced	2245
136	Orders Placed This Period by Customer and Required Date	2246
137	Orders Placed This Period by Customer , Product and Required Date, Amts	2247
138	Sales History and Open Orders by Customer , Customers sliced (g)	2248
139	Sales History and Open Orders by Customer & Salesperson, Measures sliced (g)	2249
140	Sales History and Open Orders by Customer and Product, Measures sliced (g)	2250
141	To Date Amt Outstanding and Back ordered by Customer	2251
142	To Date Amt Outstanding and Back ordered by Customer and Product	2252
143	Total Open Orders by Customer	2253
144	Total Open Orders by Customer and Product	2254
145	Total Open Orders by Customer and Product Line	2255
	<b>Reports by Customer Region</b>	
146	Avg Order Amt by Region (g)	2256
147	Open Orders by Region and Days Late (g)	2257
148	Orders Placed This Period by Region and Required Date	2258
149	Sales History and Outstanding Orders by Region, Customer sliced (g)	2259
150	To Date Amt Outstanding and Back ordered by Region (g)	2260
151	Total Open Orders by Region (g)	2261
	<b>Reports by Product</b>	
152	Avg Order Amt by Product	2262
153	Avg Order Amt by Product and Customer	2263
154	Open Orders by Product and Days Late, Measures sliced	2264
155	Open Orders by Product, Customer and Days Late, Measures sliced)	2265
156	Open Orders by Product, Salesperson and Days Late, Measures sliced	2266
157	Open Orders by Product and Required Date, Measures sliced	2267
158	Open Orders by Product, Customer and Required Date, Measures sliced	2268
159	Open Orders by Product, Salesperson and Required Date, Measures sliced	2269
160	Orders Placed This Period by Product and Required Date, Amts	2270
161	Orders Placed This Period by Product and Required Date, Qties	2271
162	Orders Placed This Period by Product, Customer and Required Date, Amts	2272
163	Orders Placed This Period by Product, Salesperson and Required Date, Amts	2273
164	Sales History and Open Orders by Product, Product sliced (g)	2274
165	Sales History and Open Orders by Product and Customer , Measures sliced (g)	2275
166	Sales History and Open Orders by Product & Salesperson, Measures sliced (g)	2276
167	Total Open Orders by Product	2277
168	Total Open Orders by Product and Customer	2278
169	Total Open Orders by Product and Salesperson	2279
170	Total Open Orders by Product and Warehouse	2280
171	Total Open Orders by Product, Customer and Salesperson	2281
172	Total Open Orders by Product, Salespeople and Customer	2282
173	Total Open Orders by Product Line	2283
174	Total Open Orders by Product Line and Customer	2284
175	Total Open Orders by Product Line and Product	2285
176	Total Open Orders by Product Line and Salespeople	2286
177	Total Open Orders by Product Line and Warehouse	2287
178	Total Open Orders by Product Line, Customer and Salesperson	2288
179	Total Open Orders by Product Line, Salesperson and Customer	2289
180	To Date Qty Outstanding and Back ordered by Product	2290
181	To Date Qty Outstanding and Back ordered by Product and Customer	2291
182	To Date Qty Outstanding and Back ordered by Product and Salesperson	2292
	<b>Reports by Salesperson</b>	

183	Avg Order Amt by Salesperson	2293
184	Open Orders by Salesperson and Days Late	2294
185	Open Orders by Salesperson, Customer and Days Late, Measures sliced	2295
186	Open Orders by Salesperson, Product and Days Late, Measures sliced	2296
187	Open Orders by Salesperson and Required Date, Measures sliced	2297
188	Open Orders by Salesperson, Customer and Required Date, Measures sliced	2298
189	Open Orders by Salesperson, Product and Required Date, Measures sliced	2299
190	Orders Placed This Period by Salesperson and Required Date	2300
191	Orders Placed This Period by Salesperson, Customer and Required Date	2301
192	Orders Placed This Period by Salesperson, Product and Required Date, Amts	2302
193	Sales History and Open Orders by Salesperson, Salesperson sliced (g)	2303
194	Sales History and Open Orders by Salesp & Customer, Measures sliced (g)	2304
195	Sales History and Open Orders by Salesp and Product, Measures sliced (g)	2305
196	Total Open Orders by Salesperson	2306
197	Total Open Orders by Salesperson and Customer	2307
198	Total Open Orders by Salesperson and Product	2308
199	Total Open Orders by Salesperson and Product Line	2309
200	Total Open Orders by Salesperson and Warehouse	2310
201	Total Open Orders by Salesperson, Customer and Product	2311
202	Total Open Orders by Salesperson, Product and Customer	2312
203	To Date Amt Outstanding and Back ordered by Salesperson	2313
204	To Date Amt Outstanding and Back ordered by Salesperson and Customer	2314
205	To Date Qty Outstanding and Back ordered by Salesperson and Product	2315
<b>Sales Order Details Reports</b>		
206	Sales Order Details by Customer This Period	2316
207	Sales Order Details by Customer and Product This Period	2317
208	Sales Order Details by Product This Period	2318
209	Sales Order Details by Product and Customer This Period	2319
210	Sales Order Details by Product and Salesperson This Period	2320
211	Sales Order Details by Salesperson This Period	2321
212	Sales Order Details by Salesperson and Customer This Period	2322
213	Sales Order Details by Salesperson and Product This Period	2323
<b>Top and Bottom Performers Reports</b>		
214	Decomposition Tree- Customer Outstanding Amt (g)	2324
215	Decomposition Tree-Region Outstanding Amt (g)	2325
216	Decomposition Tree- Product Outstanding Amt (g)	2326
217	Decomposition Tree- Salespeople Outstanding Amt (g)	2327
218	Performance Map by Customer - Outstanding Amt and Gross Profit (g)	2328
219	Performance Map by Region- Outstanding Amt and Gross Profit (g)	2329
220	Performance Map by Product- Outstanding Amt and Gross Profit (g)	2330
221	Performance Map by Salesperson- Outstanding Amt and Gross Profit (g)	2331
222	Top Customers by Gross Profit Amt (g)	2332
223	Top Customers by Late Outstanding Amt and Invoiced Amt	2333
224	Top Customers by Outstanding Amt (g)	2334
225	Top Customers by Outstanding Amt plus Invoiced Amt (g)	2335
226	Top Product by Gross Profit Amt (g)	2336
227	Top Products by Late Outstanding Qty and Invoiced Qty	2337
228	Top Products by Outstanding Amt (g)	2338
229	Top Products by Outstanding Qty (g)	2339
230	Top Products by Outstanding Amt plus Invoiced Amt (g)	2340
231	Top Regions by Gross Profit Amt (g)	2341
232	Top Regions by Late Outstanding Amt and Invoiced Amt	2342
233	Top Regions by Outstanding Amt (g)	2343
234	Top Regions by Outstanding Amt plus Invoiced Amt (g)	2344
235	Top Salespeople by Gross Profit Amt (g)	2345
236	Top Salespeople by Late Outstanding Amt and Invoiced Amt	2346
237	Top Salespeople by Outstanding Amt (g)	2347
238	Top Salespeople by Outstanding Amt plus Invoiced Amt (g)	2348

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