



DataSelf Analytics

SUPPORTING DOCUMENTS

Revision Date: 05/06/2014



This Statement of Work may not be disclosed outside of your organization. It may not be disclosed in whole or in part for any purpose other than to evaluate the DataSelf services and solutions. You will have the right to disclose this Statement of Work provided that a contract is awarded to DataSelf Corp as a result of or in connection with the submission of this document. DataSelf Corp retains ownership of this Statement of Work (SOW).

Table of Contents

APPENDIX I – WHY DATASELF ANALYTICS	3
APPENDIX II – DATASELF ANALYTICS DEPLOYMENT METHODOLOGY	5
APPENDIX III – EXAMPLES OF OUT-OF-THE-BOX DASHBOARDS	8
APPENDIX IV – CLIENT REFERENCE SITES	14
APPENDIX V: END-USER LICENSE AGREEMENT (EULA)	16
APPENDIX VI: LIST OF OUT-OF-THE-BOX REPORTS, DASHBOARDS AND KPIS v1010	21

APPENDIX I – WHY DATASELF ANALYTICS

DataSelf Value Proposition

DataSelf Analytics provides decision-makers with easy access to informative reports, KPIs (Key Performance Indicators) and dashboards anytime and anywhere using desktop, web and mobile devices.

Comprehensive out-of-the-box solution: As a starting point, the complete solution provides over 2,000 pre-defined KPIs, reports and dashboards¹. This library has been built from over 14 years of experience in delivering an industry-leading ultralight data warehouse and analytics platform to mid-size companies. This library continues to grow on a per-engagement-basis, inspired by the most popular data analysis needs from hundreds of mid-size companies.

Easy to customize: When it comes to customizing reports to meet specific needs, on average, users can successfully create and manage more than 70% of their own custom data analysis needs with no additional IT help. This is accomplished by two major factors:

- **Customer data:** Once deployed, DataSelf Analytics solutions are mapped to the customer's critical reporting parameters. For instance, the solution for sales analysis is mapped to **all** relevant information such as customers, products, regions, salespeople, ship-to's and invoice information. When someone needs a new report, that person simply drags and drops the desired reporting parameters into a report and uses filters, summarizations and charts as needed.
- **Empowering customers to take ownership of their reporting needs:** On the client-side, DataSelf Analytics uses best-in-class, easy to use reporting tools available from the upper market based on technology from Tableau and Microsoft BI. DataSelf Analytics most popular client tool was designed by Stanford University Professors who studied how business people look at real-world business data and make sense from it. The outcome of this study was a smart software engine that helps decision makers walk through the data discovery journey with little or no help from external IT resources, such as analysts, systems administrators, data architects or the like. This ease of access means that anytime or anywhere, decision makers will be able to quickly and easily access their data and analyze that data as needed.

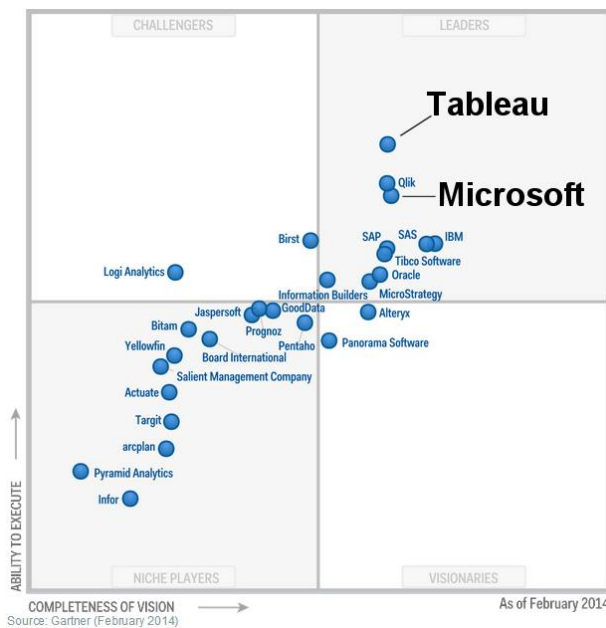
What about IT's role? IT is usually involved with the deployment and maintenance of the DataSelf Analytics back-end system. IT tasks typically include backups, security setup, data refresh scheduling and maintenance, as well as adding new reporting parameters when needed: for instance, by adding new ERP user-defined fields or a new CRM table into the existing analytics solution. IT will be empowered to perform the job quickly and efficiently because they will be using well established industry-standard technology. There are extensive online and in-person tech support resources provided by DataSelf, Tableau and Microsoft throughout the engagement.

¹ please see 'DataSelfAnalytics_SupportingDocuments.pdf > B) CLIENT-SIDE OUT-OF-THE-BOX TEMPLATES v1010'

About DataSelf

DataSelf simplifies and amplifies analytics and data warehousing for mid-size companies. DataSelf solutions include two leaders of BI solutions from the upper market: Tableau and Microsoft. According to Feb-2014 Gartner’s Magic Quadrant for BI and Analytics - see picture X below - Tableau is currently considered the best provider of data visualization and dashboard technology, while Microsoft is considered the best provider of BI infrastructure. By using DataSelf’s ETL (extraction, transformation and loading tool), DataSelf simplifies the deployment and maintenance of a solution that combines the strengths of both Tableau and Microsoft BI. Through the addition of a unique, proprietary library of over 2,000 reports, KPIs and dashboards, DataSelf amplifies the value of this software platform – customer’s won’t need to build the connections and reports from scratch, but simply customize and build on top of their existing templates.

Gartner Magic Quadrant for BI and Analytics Platform



Picture 1 – Gartner Magic Quadrant for BI and Analytics Platforms

DataSelf provides many critical differentiators:

- **Ease of use:** The easiest-to-use industry-standard BI platform based on Tableau and Microsoft BI.
- **Fast time to deploy:** Typically in hours or days, versus months or years from DataSelf’s competitors.
- **Expertise:** DataSelf’s core team has over 14 years of experience working with mid-market ERP and CRM systems and connecting those systems with leading BI software. DataSelf’s professional services team possesses extensive knowledge of Sage 300 (Accpac) and Sage CRM setups, and is well-versed in BI tools and their interconnectivity into one core platform for mid-size companies.
- **Low Cost:** A DataSelf solution typically costs a fraction of competing offerings.

APPENDIX II – DATASELF ANALYTICS DEPLOYMENT METHODOLOGY

This section provides an overview of DataSelf Analytics Deployment Methodology. This sequential process provides clients with a clear, concise and repeatable process for successful deployment of DataSelf Analytics in any supported environment. A description of each phase as well as specific team role(s) involved in utilizing the DataSelf Analytics Deployment Methodology are as follows (see next section for description of DataSelf Analytics team roles):

Initiate: The *Initiate* phase serves as the project's launch. Business sponsors, the IT team and project champions gather to review the project's goals, the DataSelf Analytics methodology and planning for the deployment's next steps. Roles involved:

- Client: Business sponsor, project manager, IT manager, business analyst.
- DataSelf: Account manager, project manager, sr. solution architect, sr. consultant.

Specify: DataSelf and the client's team discuss the requirements, design a project specification, and then plan for the duration of the deployment within the *Specify* phase. Roles involved:

- Client: Project manager, IT manager, business analyst.
- DataSelf: Project manager, Sr. solution architect, sr. consultant.

Execute: In the *Execute* phase, DataSelf's team initiates deployment of the server-side software, templates and software customizations in collaboration with and ongoing input from the client's teams. Deployment of the client-side software and security modules occurs when the system is ready for end users. Roles involved:

- Client: Project manager, IT manager & staff, business analyst.
- DataSelf: Project manager, Sr. solution architect, sr. consultant.

Testing/QA: The quality assurance *Testing/QA* phase normally occurs concurrently with the project's execution, and involves the client's IT and/or business analyst staff. Upon completion of the Execute phase, and with support and training from DataSelf, the client's team then performs a final data accuracy test prior to deployment training for the client's final users. Roles involved:

- Client: Project manager, IT manager & staff, business analyst, business sponsor, testing end-users.
- DataSelf: Project manager, Sr. solution architect, sr. consultant.

Training: DataSelf provides extensive *Training* in this phase, ensuring that clients maximize their investment in DataSelf Analytics. The training includes live, web-based classes to cover the fundamentals of the solution, as well as online self-served training videos and documentation. Roles involved:

- Client: Project manager, IT manager & staff, business analyst, business sponsor, testing end-users.
- DataSelf: Project manager, Sr. solution architect, sr. consultant.

Close: The DataSelf and client's teams gather to review and summarize the outcome of the now deployed project, along with discussing future plans for expansion and/or additional support or additional training as needed at the *Close* of the current project. Roles involved:

- Client: Business sponsor, project manager, IT manager, business analyst.
- DataSelf: Project manager, Account manager, sr. solution architect, sr. consultant.

Training

DataSelf Knowledge Transfer Process: DataSelf's best practices and past performance among DataSelf's clients has consistently demonstrated that the most efficient knowledge transfer happens throughout the project as the teams from DataSelf and the client interact. Such interaction is even more effective when combined with the many web-based training (WBT) videos available from both DataSelf and our technology partners. The following section details the training curriculum and expected learning outcomes, as well as the location of online resources to supplement the hands-on course work.

Training Classes: DataSelf has determined that training classes of up to 2 hours per day, and when held at least 2 days apart, creates an ideal learning environment for trainees to learn and demonstrate competency with new concepts, before further new concepts can be properly absorbed. Furthermore, past engagements consistently reinforce the efficiency of instructor-led, web-based training as a great platform for learning DataSelf Analytics, especially in conjunction with the online, self-paced training videos and documentation referenced further in this section.

DataSelf's training classes consists of the following course types:

- **Power-User Training:** This course is specifically designed for decision makers, business analysts and consultants who want complete control of their data analysis needs and/or may be tasked to support viewer users. This course provides an overview of predefined queries and data structures, the main navigation techniques of the user interface, how to analyze and segment reports, as well as creating new reports from scratch. Class size: up to 5 people.
- **Viewer-users Training:** This course is designed for decision makers, business analysts and consultants who will be consuming reports and require limited capability to filter, analyze and segment data. This course covers an overview of predefined queries and how to navigate reports and dashboards. Class size: up to 15 people.
- **Admin-user Training:** This course designed for System Administrators and other IT staff and consultants who will be tasked with maintaining the DataSelf and ultralight data warehouse and ultralight data warehouse Analytics server-side software. The course covers end-user security, client-tool installation, web server and ultralight data warehouse administration tasks, refresh logs, system troubleshooting, as well as backup procedures. Class size: up to 5 people.

DataSelf and its technology partners (Microsoft BI and Tableau) also provide extensive online documentation, end-user forums and online training videos that cover a variety of subjects. The following links provide access to online video training and tutorials:

- DataSelf: www.dataself.com/training/
- Tableau (**use login: info@dataself.com, password ferrari1**): www.tableausoftware.com/learn/training
- Microsoft: www.microsoftvirtualacademy.com/training-courses/implementing-a-data-warehouse-with-sql-server-jump-start#?fbid=LN2T8Xh-o8a

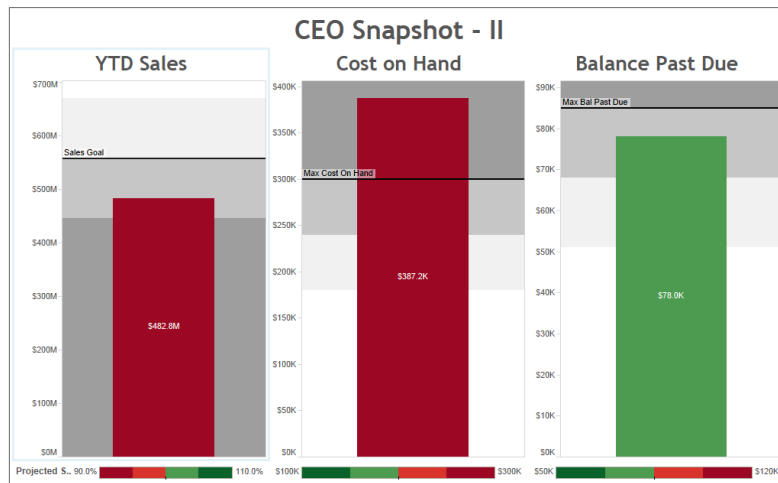
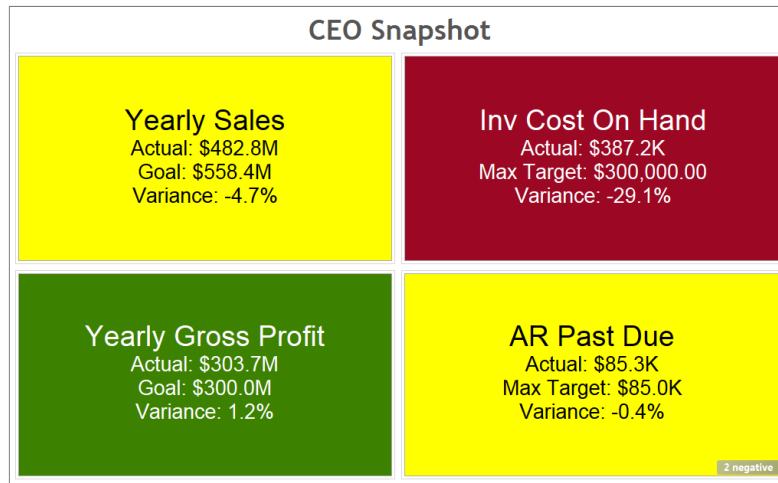
DataSelf Analytics Team Roles

DataSelf provides best-in-class consulting resources when staffing an engagement. Consultants and other professional services staff and specialists are vetted subject matter experts in their field, as well as possessing an over-all high standard of professional acumen in areas such as project management, methodology and process, as well as holding industry-recognized certifications such as Project Management Professional (PMP) or Microsoft Certifications in a variety of data warehousing, data management, business intelligence and analytics specialties. Their roles are as follows:

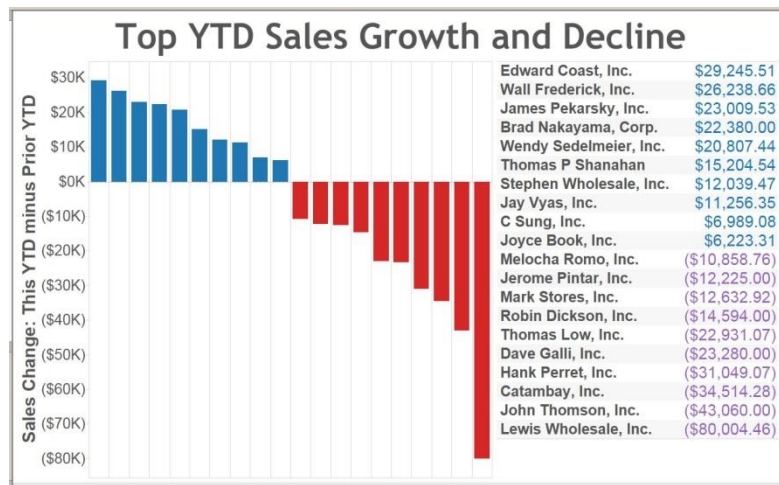
Account manager: Ensures that business and technical goals are aligned to the client's expectations. Takes ownership of business terms, conditions, and over-all client satisfaction relative to the Professional Services component of the engagement. The account manager is a subject matter expert in source databases and BI solutions with at least 10 years of experience.

- **Project manager:** Provides project management services to coordinate DataSelf's on and off-site work, communicates the project's status and progress with client's project management team as well as other key stakeholders.
- **Sr. Solution Architect:** Provides overall technical direction, management and execution of the project. The Sr. Solution Architect is a subject matter expert in reporting, data warehousing and analytics among mid-market ERP, CRM and similar data sources, and possesses at least 10 years of practical experience working in those areas.
- **Sr. Consultant:** Executes and facilitates the project's implementation. The Sr. Consultant is a subject matter expert in reporting, data warehousing and analytics in mid-market ERP, CRM and other data sources with at least 3 years of experience working in those areas.

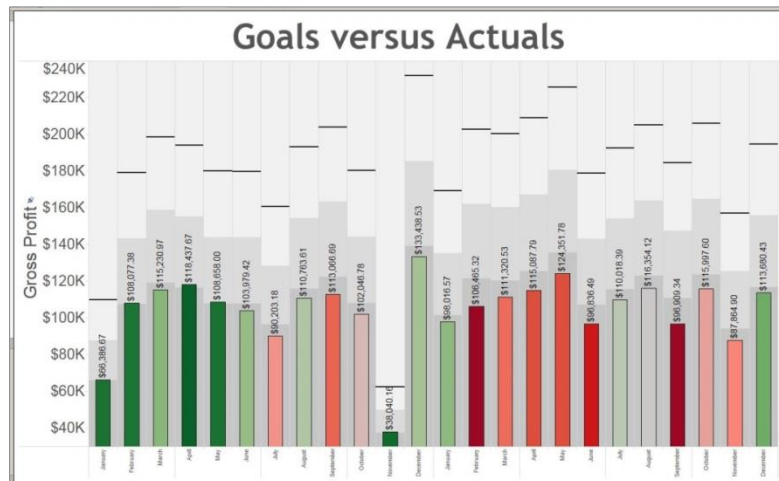
APPENDIX III – EXAMPLES OF OUT-OF-THE-BOX DASHBOARDS



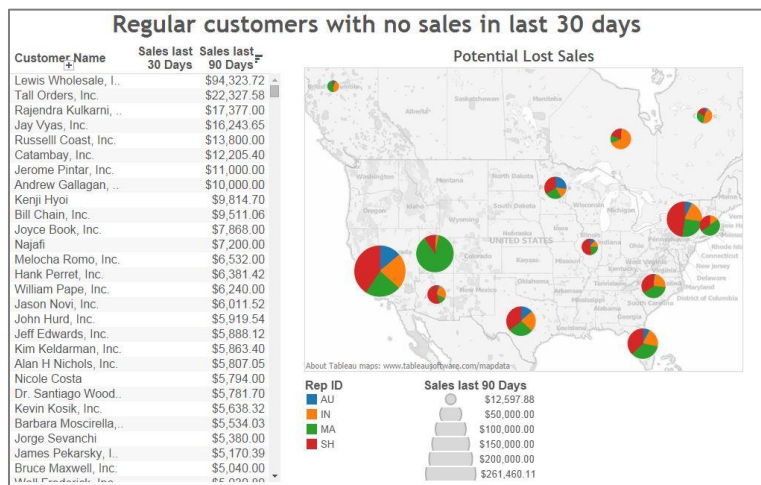
These are two examples of C-Level dashboards. They are designed to show critical KPIs in a simple and informative way for senior management. From these dashboards, management can go into other dashboards that will provide more detailed information. The C-Level dashboards usually require customization services since each executive requires unique ways to visualize and analyze their KPIs.



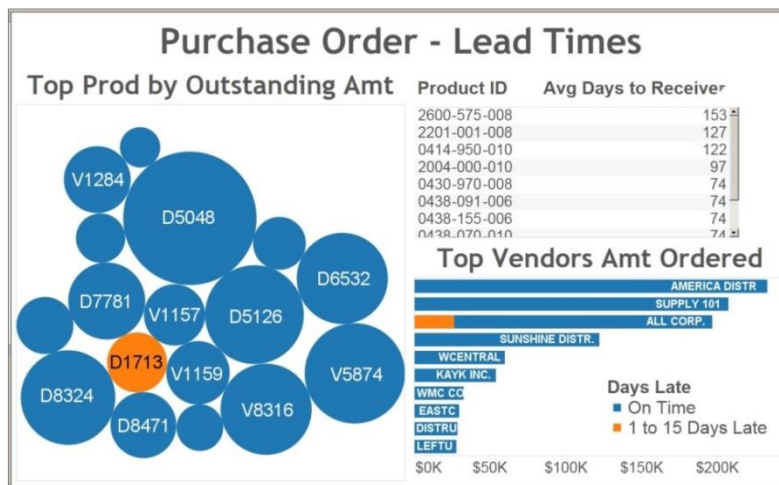
This type of dashboard shows the tips of the growth curve of a major metric. In this example, the top customers by sales growth and decline in a YTD basis.



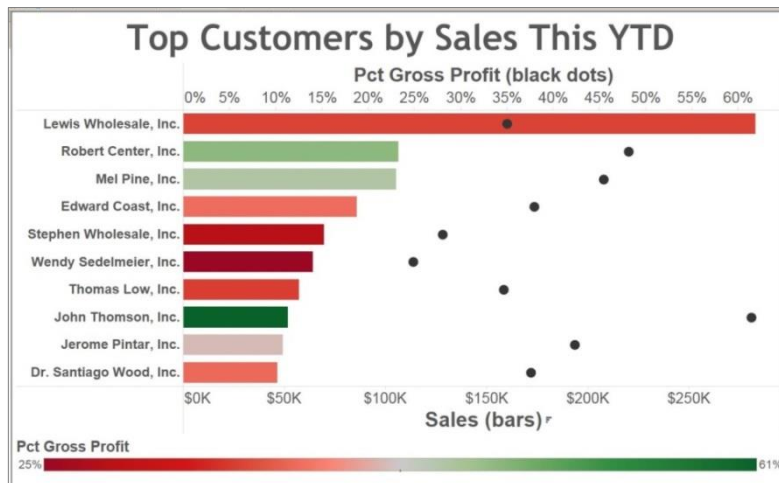
A bullet-chart for goals versus actuals. Bars represent actuals, horizontal lines represent goals, the gray background bars represent performance areas: poor (dark gray), satisfactory (gray) and good (light gray).



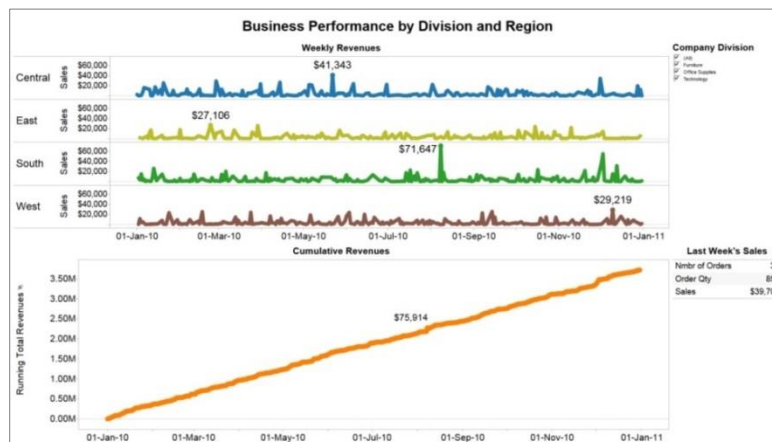
Exception reporting: This type of dashboard shows transactions that are no longer happening. In this example, regular customers who are no longer buying.



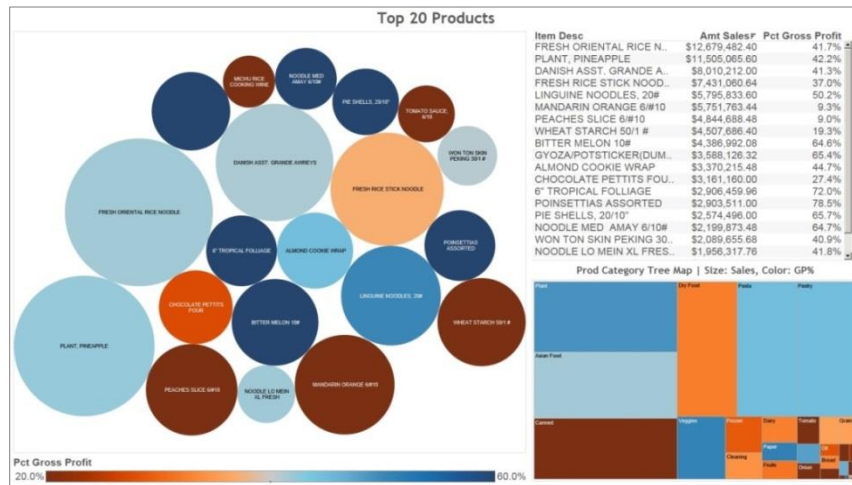
PO Lead Times KPIs: bubbles for the top product IDs by outstanding amount, a list of top product IDs by average days to receive, and top vendors for amount ordered in this period. Orange colors represent amounts that are 1 to 15 days late.



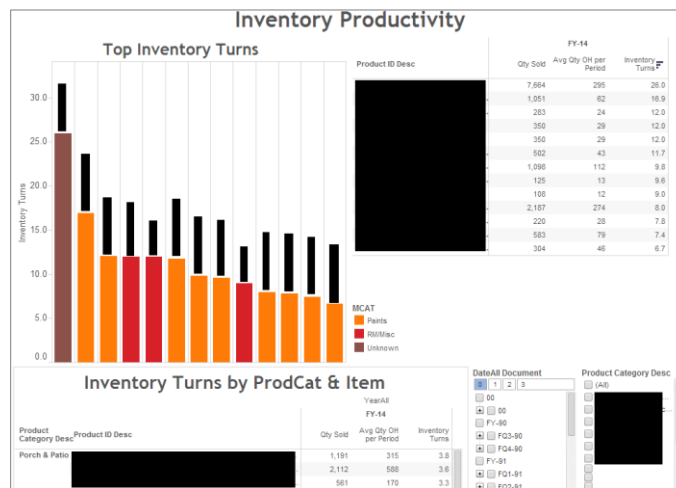
Top performers: This type of dashboard shows top performers from a major KPI and how they are doing versus another major KPI. In this example, top customers by sales this YTD and their profitability.



Business Performance by Division and Region



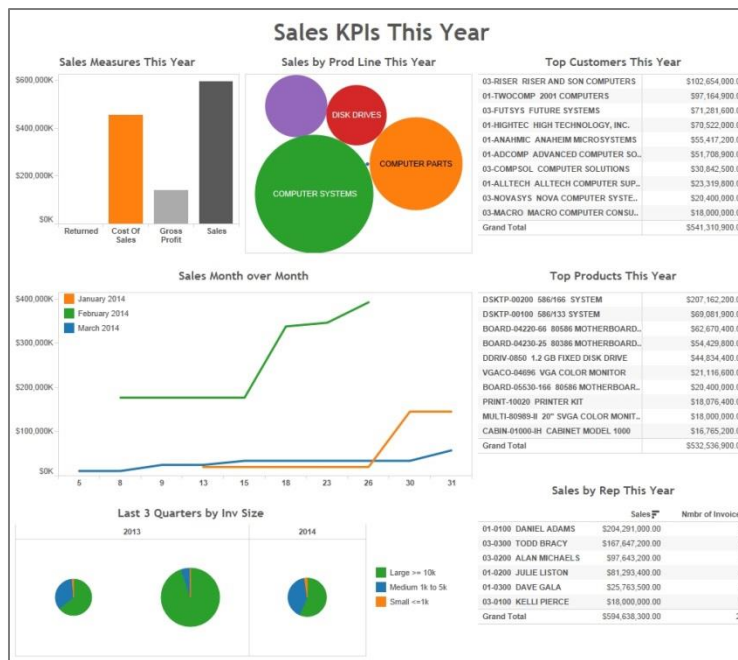
Top 20 Products Dashboards



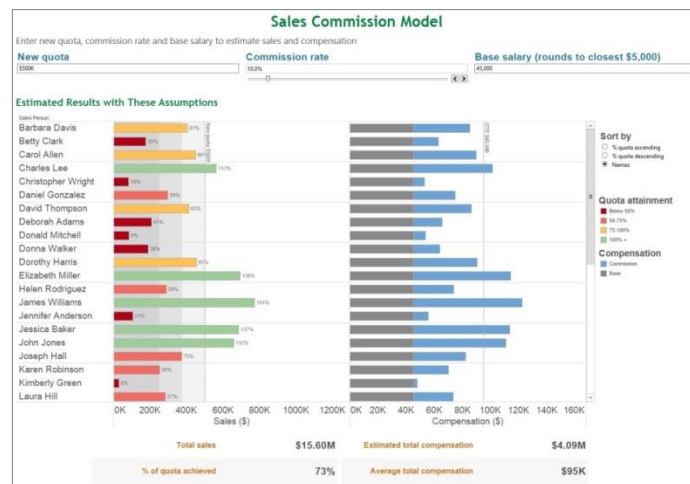
Inventory Productivity Dashboards – blacked out areas for privacy of data



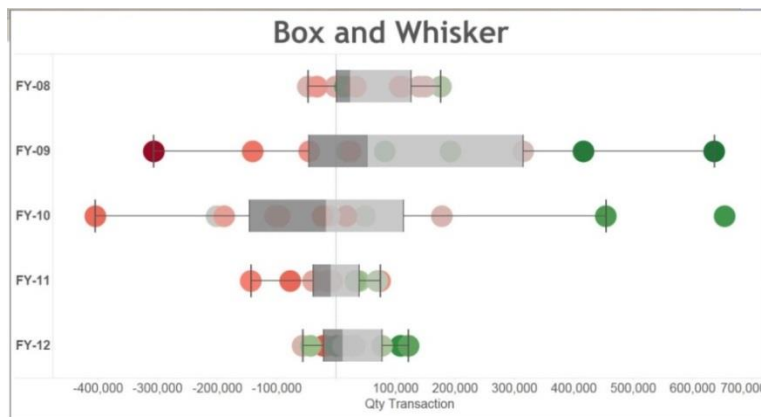
Pricing Strategy for Tier 1 Customers Dashboard – blacked out areas for privacy of data



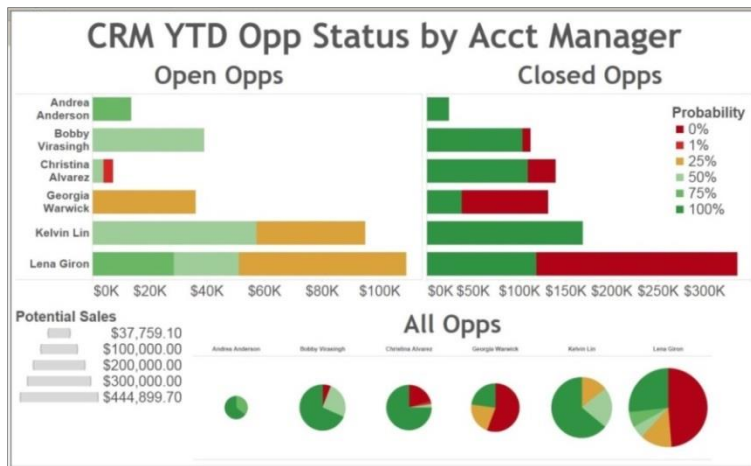
Consolidation dashboards: This type of dashboard consolidates several KPIs.



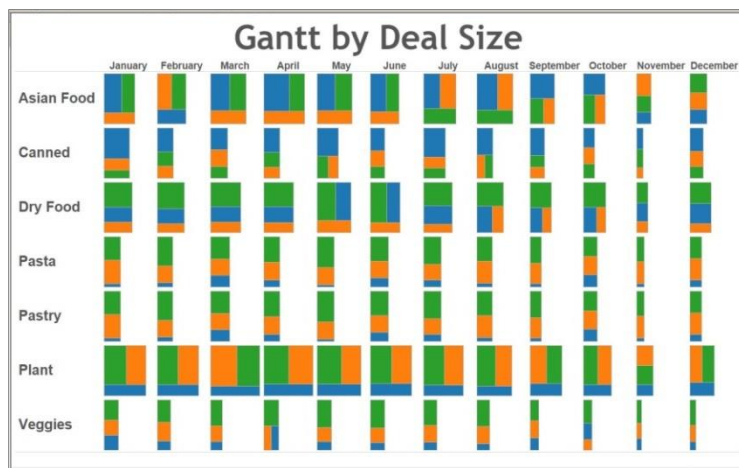
Sales Commission Example



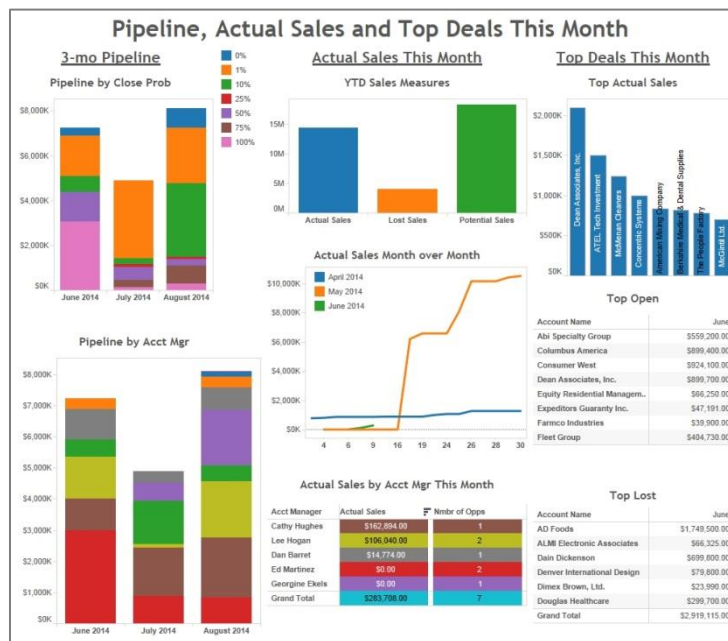
Box and Whisker Dashboard



CRM YTD Opportunity Status by Acct Manager























Gantt Chart by Deal Size



Consolidation dashboards: This type of dashboard consolidates several KPIs.

APPENDIX IV – CLIENT REFERENCE SITES

 <p>A.R.T. Furniture, Inc. Jing Chen / CFO jing@art-furniture-inc.com 909-390-1039 Ontario, CA www.art-furniture-inc.com</p>	 <p>Associated Research, Inc. Adam Braverman adam.braverman@ikonixgroup.com 800-858-8378 Lake Forest, IL www.ikonixgroup.com</p>	 <p>ATRO Engineered Systems, Inc. Leslie Hull / VP of Sales lhull@atrobushing.com Sullivan, MO www.atrobushing.com</p>
 <p>BodyGlide Anja Faigle / International Operations Manager anja@bodyglide.com 425 467 6580 Bellevue, WA www.bodyglide.com</p>	 <p>Calaveras Telephone Company Lou Cherniss / CFO lou.nat@gmail.com Copperopolis, CA www.caltel.com</p>	 <p>Chef Works Dave Roth / COO droth@cargalusa.com 858-361-1722 San Diego, CA www.cargalusa.com</p>
 <p>East Coast Mechanical, Inc. Jason Coleman / Director of IT/MIS jcoleman@ecmservice.com 561.586.3739 Boynton Beach, FL www.ecmservice.com</p>	 <p>EFI Energy Federation Inc John O'Connell / Director, Wholesale Division joconnell@efi.org 508-870-2277 Westborough, MA www.efi.org</p>	 <p>Implus Footcare LLC Sam Prestipino Sr / COO sprestipino@4implus.com T 919-314-1933 Morrisville, NC www.implus.com</p>
 <p>Kenroy Home Gary Winters / Controller GWinters@kenroyhome.com 904-642-4340 Jacksonville, FL www.kenroyhome.com</p>	 <p>Moldex-Metric, Inc. Steve Wooley / Director of IT Operations sysadmin@moldex.com 310-744-8807 Culver City, CA www.moldex.com</p>	 <p>Phoenix A.M.D. International, Inc. Yavuz Yildirim / IT Manager yavuz@phoenixamd.com 800-661-7313 x231 Bowmanville, ON Canada www.phoenixamd.com</p>

 <p>Profiles International, Inc Bill Bramlett / Vice President, Software Development bill.bramlett@profilesmail.com (254) 399-5554 Waco, TX www.profilesmail.com</p>	 <p>Pyramid Technology Marlowe Gronbeck / VP Finance mgronbeck@ptitime.com 203-238-0550 X251 Meriden, CT www.ptitime.com</p>	 <p>SawStop, LLC David Fulmer / VP fulmer@sawstop.com 503-570-3200 Tualatin, OR www.sawstop.com</p>
 <p>St David's Hydroponics Ltd Carolyn Payette / Controller Carolyn@stdavidshydroponics.com 905-988-5636 x223 Beamsville, ON – Canada www.stdavidshydroponics.com</p>	 <p>Supreme Chemicals of GA, Inc. Allison Grabiak / Operations Manager allison@krudkutter.com 770-888-8827 Cumming, GA www.krudkutter.com</p>	 <p>Ware, Inc. John Lucas / IS Director john.lucas@wareinc.com 800-228-8861 x4136 Louisville / KY www.wareinc.com</p>
 <p>Wiley X Eyewear John Barrett / CFO jbarrett@wileyx.com 800-776-7842 Livermore, CA www.wileyx.com</p>	 <p>Worldwise, Inc. Robin Fowler / CFO rfowler@worldwise.com (415) 721-7400 San Rafael, CA www.worldwise.com</p>	

APPENDIX V: END-USER LICENSE AGREEMENT (EULA)

DATASELF BI / DATASELF ANALYTICS

END-USER LICENSE AGREEMENT

This **DATASELF BI / DATASELF ANALYTICS END-USER LICENSE AGREEMENT** (this “**Agreement**”) is a legal agreement between you (either an individual or a single entity) and DataSelf Corporation, a California corporation with a principal address of 10 S. 3rd St., 3rd Floor, San Jose, CA 95113 (“**DataSelf**”) regarding the use of the **Licensed Software Product (as defined below)**. By installing, copying, or otherwise using the Licensed Software Product, you agree to be bound by the terms of this Agreement. **IF YOU DO NOT AGREE TO THE TERMS OF THIS AGREEMENT, PROMPTLY RETURN THE UNUSED LICENSED SOFTWARE PRODUCT TO THE PLACE FROM WHICH YOU OBTAINED IT FOR A FULL REFUND.**

1. DEFINITIONS. As used in this Agreement, the following terms shall have the meanings indicated below:

1.1. “Authorized Users” means employees of Licensee identified by name as users in the Proposal Agreement who use the Licensed Software Product, for the sole benefit of Licensee, to perform their duties within the scope of their employment and subject to all the terms and conditions of this Agreement.

1.2. “Confidential Information” has the meaning assigned to that term in Section 7.1 hereof.

1.3. “Derivative Work” has the meaning set forth in the United States Copyright Act of 1976, Title 17 USC Section 101.

1.4. “Documentation” means all documentation, user manuals, reference manuals, release, application and methodology notes, and/or written utility programs and related material provided by DataSelf to Licensee with respect to the Licensed Software Product.

1.5. “High Risk Activities” has the meaning assigned to that term in Section 12.5 hereof.

1.6. “Licensed Software Product” means (a) the DataSelf BI software provided to Licensee by DataSelf in executable form (but not the source code relating thereto), including any Software Components, (b) the Documentation, and (c) any New Releases that DataSelf may provide to Licensee from time to time.

1.7. “New Release” means a new release of the Licensed Software Product that DataSelf, in its discretion, makes available to Licensee including corrections of errors (“bug fixes”), workarounds and/or incremental feature improvements, updates, performance improvements, functional enhancements, corrections to application problems, or support for new hardware platforms, and that provides substantially new and different features and/or functions.

1.8. “Proposal Agreement” means the Perpetual License Agreement or Rental Agreement, as the case may be, pursuant to which Licensee has agreed to pay DataSelf in exchange for a license to use the Licensed Software Product.

1.9. “Perpetual License Agreement” means an agreement between DataSelf and a licensee pursuant to which such licensee agrees to pay a one-time fee for a perpetual license to the Licensed Software Product (subject to the terms of such agreement).

1.10. “Rental Agreement” means an agreement between DataSelf and a licensee pursuant to which such licensee agrees to rent a license to the Licensed Software Product for a limited term (subject to the terms of such agreement).

1.11. “Software Components” means the following, to the extent contained in the Licensed Software Product (a) certain DataSelf ETL software, (b) certain DataSelf BI Templates (including pre-defined designs and structures for a

data warehouse, multi-dimensional data cubes, reports, queries, and other integrating features), (c) certain software licensed from Microsoft Corporation, and (d) certain software licensed from Tableau Software, Inc.

1.12. “Termination Date” means the date set forth in a Rental Agreement on which the license to the Licensed Software Product terminates, as such date may be extended pursuant to the terms of such Rental Agreement.

2. GRANT OF LICENSE.

2.1. The Licensed Software Product is protected by copyright laws and international copyright treaties, as well as other intellectual property laws and treaties. The LICENSED SOFTWARE PRODUCT is licensed, not sold, and DataSelf shall at all times retain ownership of all Licensed Software Product including the Documentation and any copies thereof.

2.2. Subject to the terms and conditions of this Agreement, the Proposal Agreement, and timely payment by Licensee of the fees required under the Proposal Agreement, DataSelf hereby grants to Licensee until termination or expiration of this Agreement pursuant to Section 8 hereof a non-exclusive and non-transferable right for Authorized Users to use the Licensed Software Product on computers located at the Licensed Facilities (the “License”). The License is subject to the specifications set forth in the Proposal Agreement with respect to source database name and version, server edition, type and version, software platform, number of data sources, size of data tables, number and type of software templates, names of users and specific usage rights afforded to each named user. This Agreement does not authorize any person to use the Licensed Software Product other than Authorized Users identified to DataSelf in accordance with the Proposal Agreement. Other than as expressly set forth in this Section 2, DataSelf grants and Licensee receives no other rights or licenses to the Licensed Software Product or the Documentation or any intellectual property rights related thereto, whether by implication, estoppel or otherwise.

2.3. In addition to the terms of this Agreement, the use of Software Components licensed from Microsoft Corporation and Tableau Software, Inc is governed by and subject to the end user license agreements of Microsoft Corporation and Tableau Software, Inc, respectively. The end user license agreement of Microsoft Corporation is available at <http://www.microsoft.com>. The end user license agreement of Tableau Software, Inc is currently available at <http://www.tableau.com>. These end user license agreements may be subject to change, and DataSelf has no obligation to inform Licensee of any such changes.

2.4. Licensee may make one (1) copy of the Licensed Software Product and Documentation for backup or archival purposes provided that all titles, trademark symbols, copyright symbols and legends, and other proprietary markings are reproduced in such copy. Licensee may not otherwise reproduce the Licensed Software Product or Documentation.

2.5. Licensee shall ensure that all access to the Licensed Software Product is through a secure network, by Authorized Users only, and that all Authorized Users shall have executed non-disclosure agreements with Licensee that protect against the disclosure of DataSelf’s Confidential Information and contain provisions at least as restrictive as the provisions contained in Section 7 of this Agreement. Licensee shall be wholly responsible and liable for all acts and omissions of Authorized Users, including without limitation any use of the Licensed Software Product or Documentation, protection of Confidential Information, and compliance with all the terms and conditions of this Agreement.

3. LIMITATIONS AND RESTRICTIONS ON LICENSE. Licensee agrees that it will not by itself, or through any parent, subsidiary, affiliate, agent or other third party (a) reverse engineer, decompile, or disassemble the Licensed Software Product, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation, (b) sell, encumber, commercially host, rent, or lease the Licensed Software Product, or otherwise provide fee-based use of, or access to any functionality of, the Licensed Software Product, (c) bundle or incorporate the Licensed Software Product with or into any other software (unless expressly permitted by DataSelf and necessary to effect the intended use of the Licensed Software Product under this Agreement) or create any Derivative Work of the Licensed Software Product or any Confidential Information of DataSelf, or (d) use the Licensed Software Product or Documentation to develop a product that competes with the Licensed Software Product. Licensee may not transfer any of Licensee’s rights under this Agreement without the prior written consent of DataSelf, which may be withheld by DataSelf, in its sole discretion, for any reason.

4. INTELLECTUAL PROPERTY OWNERSHIP. Title, ownership rights, and intellectual property rights in and to the Licensed Software Product shall remain in DataSelf and/or its suppliers. Licensee shall abide by the copyright law and all other applicable laws of the United States including, but not limited to, export control laws. Licensee acknowledges that the SOFTWARE in source code form remains a confidential trade secret of DataSelf and/or its suppliers and Licensee agrees not to modify the SOFTWARE or attempt to decipher, decompile, disassemble or reverse engineer the SOFTWARE, except to the extent applicable laws specifically prohibit such restriction.

5. U.S. GOVERNMENT RESTRICTED RIGHTS. The Licensed Software Product and documentation are provided with RESTRICTED RIGHTS. Use, duplication, or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data Computer Software clause at DFARS 252.227-7013 or subparagraphs (c)(1) and (2) of the Commercial Computer Software-Restricted rights at 48 CFR 52.227-19, as applicable. For the purposes thereof, the contractor/manufacturer is DataSelf Corporation, 10 S. 3rd St. 3rd Floor, San Jose, CA, 95113, USA.

6. EXPORT CONTROLS. Licensee will not, directly or indirectly, export or re-export the Licensed Software Product without the appropriate United States or foreign government licenses. The Licensed Software Product is specifically subject to the U.S. Export Administration Regulations.

7. CONFIDENTIALITY

7.1. As used herein, “**Confidential Information**” means (a) this Agreement, the Proposal Agreement and all exhibits, schedules, and addenda hereto and thereto, and the contents hereof and thereof, including without limitation the amount of the License Fee, (b) the Licensed Software Product, whether in object or source code form, and any related technology, idea, algorithms or information contained therein, including any trade secrets relating to any of the foregoing, (c) either Party’s documentation (including without limitation the Documentation) information, data, drawings, benchmark tests, and specifications, (d) either Party’s either Party’s trade secrets, know-how, knowledge, designs, plans, drawings, specifications, reports, computer programs, algorithms, customer and supplier lists, techniques and materials, and (e) any other proprietary information supplied by either Party to the other that is clearly marked as “confidential”, “proprietary” or with other similar legends, if in tangible form, or identified as “confidential” if orally disclosed, or, as a result of the nature of the information or circumstances of its disclosure, would reasonably be assumed to be confidential. Confidential Information includes without limitation any such information, documentation, or any of the other items listed in the preceding sentence that has been disclosed by either Party to the other at any time prior to the date of this Agreement, pursuant to the process of configuring and installing the Licensed Software Product.

7.2. Each Party acknowledges that the Confidential Information constitutes valuable trade secrets and each Party agrees that it shall use the Confidential Information of the other Party solely in accordance with the provisions of this Agreement and it will not disclose, or permit to be disclosed, the same directly or indirectly, to any third party without the other Party’s prior written consent. Each Party agrees to exercise due care in protecting the Confidential Information from unauthorized use and disclosure, but no less than the level of care that it uses to protect its own confidential information. However, neither Party bears any responsibility for safeguarding any information that it can document in writing (a) is in the public domain through no fault of its own, (b) was properly known to it, without restriction, prior to disclosure by disclosing Party, (c) was properly disclosed to it, without restriction, by another person with the legal authority to do so, (d) is independently developed by receiving Party without use or reference to disclosing Party’s Proprietary Information or (e) is required to be disclosed pursuant to a judicial or legislative order or proceeding; provided that, to the extent permitted by and practical under the circumstances, the receiving Party provides to the disclosing Party prior notice of the intended disclosure an opportunity to respond or object to the disclosure, or if prior notice is not permitted or practical under the circumstances, prompt notice of such disclosure.

7.3. The obligations set forth in Section 7.1 shall survive until one or more of the exceptions set forth in Section 7.2 apply.

7.4. In the event of any actual or threatened breach of the provisions of Section 3 or this Section 7, the non-breaching Party will be entitled to seek immediate injunctive and other equitable relief, without bond and without the necessity of showing actual damage.

8. TERM AND TERMINATION.

8.1. If the Proposal Agreement is a Perpetual License Agreement then the license granted hereunder is perpetual, subject to Section 8.2 below. If the Proposal Agreement is a Rental Agreement, then the license granted hereunder shall terminate on the Termination Date, subject to Section 8.2 below, and the Licensed Software Product may be designed to automatically stop functioning as of the Termination Date.

8.2. Without prejudice to any other rights, DataSelf may terminate this Agreement at any time if Licensee fails to comply with the terms and conditions of this Agreement.

8.3. Upon expiration or termination of this Agreement for any reason, (a) any payment obligations hereunder or under the Proposal Agreement that have accrued prior to the date of expiration or termination shall immediately become due and payable, and (b) all licenses and rights granted hereunder shall cease to be effective and Licensee shall immediately cease all use of the Licensed Software Product, any New Releases, the Documentation and Confidential Information of DataSelf. Within seven (7) days of the date of expiration or termination of this Agreement for any reason Licensee shall either (at DataSelf's option) destroy or return to DataSelf the Licensed Software Product, any Derivative Works and all copies thereof, in whole or in part, the Documentation and all copies thereof, and any other Confidential Information of DataSelf in Licensee's possession. Within seven (7) days of the date of expiration or termination of this Agreement for any reason DataSelf shall either (at Licensee's option) destroy or return to Licensee any Confidential Information of Licensee in its possession and shall cease using Licensee's Confidential Information.

9. MISCELLANEOUS. This statement sets forth the entire agreement between Licensee and DataSelf, and supersedes any prior agreement, whether written or oral, relating to the subject matter of this Agreement. This statement shall be governed by and construed in accordance with the laws of the State of California, USA, and, as to matters affecting copyrights, trademarks and patents, by U.S. federal law. If any provision of this Agreement is ruled invalid, such invalidity shall not affect the validity of the remaining portions of this Agreement. Sections 4, 7, 9, 11, and 12 hereof shall survive expiration or termination of this Agreement.

10. REPRESENTATIONS AND WARRANTIES. DataSelf represents and warrants that it has, or has licensed, sufficient right, title and interest in and to the Licensed Software Products to grant the license contemplated by this agreement.

11. LICENSEE INDEMNITY. Licensee shall indemnify, defend and hold harmless DataSelf and its parents, subsidiaries, affiliates, successors, and assigns, and the employees, agents, officers, directors, shareholders and members of DataSelf and each such other person, from and against liabilities, loss, damage, cost and expense, including without limitation reasonable legal fees, arising out of any breach any warranty, representation or agreement of Licensee herein.

12. LIMITED WARRANTY; LIMITATION OF LIABILITY.

12.1. DataSelf warrants that (a) the Licensed Software Products will perform substantially in accordance with the accompanying written materials for a period of three hundred sixty five (365) days from the date of receipt, and (b) the media containing the Licensed Software Products, if any, will be free from defects in materials and workmanship under

normal use and service for a period of one (1) year from the date of receipt. Some states and jurisdictions do not allow limitations on warranty, so the above limitation may not apply to Licensee.

12.2. DATASELF AND ITS SUPPLIERS MAKES NO OTHER CONDITIONS OR WARRANTIES, EXPRESS, IMPLIED, STATUTORY OR OTHERWISE, AND EXPRESSLY DISCLAIM ALL OTHER CONDITIONS AND WARRANTIES, INCLUDING BUT NOT LIMITED TO IMPLIED CONDITIONS OR WARRANTIES OF MERCHANTABILITY, AND FITNESS FOR A PARTICULAR PURPOSE TO THE FULLEST EXTENT PERMITTED BY APPLICABLE LAW.

12.3. DataSelf's and its suppliers' sole and exclusive obligation, and Licensee's exclusive remedy in the event of a breach of the terms of this Limited Warranty, shall be, at DataSelf's option, either (a) refund of the license fee paid, or (b) repair or replacement of nonconforming Licensed Software Products accompanied by a copy of Licensee's receipt. This Limited Warranty is void if failure of the Licensed Software Product has resulted from accident, abuse, misapplication or modification by persons other than DataSelf. Any replacement Licensed Software Product will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer. Outside the United States, neither these remedies nor any product support services offered by DataSelf are available without proof of purchase from an authorized international source.

12.4. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL DATASELF OR ITS SUPPLIERS BE LIABLE FOR ANY SPECIAL, INCIDENTAL, INDIRECT, OR CONSEQUENTIAL DAMAGES WHATSOEVER (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF BUSINESS PROFITS, BUSINESS INTERRUPTION, LOSS OF BUSINESS INFORMATION, OR ANY OTHER PECUNIARY LOSS) ARISING OUT OF THE USE OF OR INABILITY TO USE THE LICENSED SOFTWARE PRODUCT, EVEN IF DATASELF HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. BECAUSE SOME STATES AND JURISDICTIONS DO NOT ALLOW THE EXCLUSION OR LIMITATIONS OF LIABILITY FOR CONSEQUENTIAL OR INCIDENTAL DAMAGES, THE ABOVE LIMITATION MAY NOT APPLY TO LICENSEE.

12.5. The Software is not fault-tolerant and is not designed, manufactured or intended for use or resale as on-line control equipment in hazardous environments requiring fail-safe performance, such as in the operation of nuclear facilities, aircraft navigation or communication systems, air traffic control, direct life support machines, or weapons systems, in which the failure of the Software could lead directly to death, personal injury, or severe physical or environmental damage ("**High Risk Activities**"). DataSelf and its Suppliers specifically disclaim any express or implied warranty of fitness for High Risk Activities. *****

APPENDIX VI: LIST OF OUT-OF-THE-BOX REPORTS, DASHBOARDS AND KPIS v1010

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.

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

10	Cash Flow Forecast by GL Account	10
11	Cash Flow Forecast by Bank Account	11
12	Cash Flow Forecast with Customer and Vendor Info	12
13	Cash Flow Overview	13

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	
37	Communications per User	50
38	Communications per Priority	51
39	Communications per Priority and User	52
40	Communications per Action	53
41	Communications per User - Avg per Day (g)	54
42	Communications per User - Count Overview	55
43	Communications per User - Pending and Complete (g)	56
44	Communications per User and Priority	57
45	Communications per Action and Priority	58
46	Communications per Priority and Action	59

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
	Account Manager	
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
	Campaign	
47	Campaign Description	106
48	Campaign Id	107
49	Campaign Id Description	108
	CRM Opportunity Details	
50	Acct Manager	109
51	Close Probability	110
52	Decision Timeframe	111
53	Department	112
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
	Close Date	
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
	Document Date	
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
	Target Close Date	
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
133	td Period	192
134	td Quarter	193
135	td Year	194
136	Year	195
	Reports by Acct Manager	
137	Average Time Elapsed per Opportunity by Acct Mgr	196
138	Acct Mgr Overview - Opport & Cases (g)	197
139	Acct Mgr Overview - All Opportunities	198
140	Acct Mgr Overview - Top Open Amts	199
141	Open Amt by Acct Mgr and Close Probability	200
142	Open Amt by Acct Mgr and Decision Frame	201

143	Open Amt & Open Opport Count by Acct Mgr (g)	202
144	Open Amt & Open SuppCases Count by Acct Mgr (g)	203
145	Open and Probable Amt by Acct Mgr	204
146	Open and Probable Amt by Department (g)	205
147	Opportunities by Account Sliced by Acct Mgr	206
148	Opportunity Categorization by Acct Mgr - Stacked (g)	207
149	Opportunity Count by Acct Mgr	208
150	Probable Amt and Open Opport Count by Acct Mgr	209
151	Sales, Open and Probable Amt by Acct Mgr	210
152	Sales by Acct Mgr	211
153	Sales Forecast by Close Date and Acct Mgr	212
154	Territory Pie Chart by Opport Amt (g)	213
155	Top Acct Mgr by Sales (g)	214
156	Top Acct Mgr by Open Amt (g)	215
157	Top Acct Mgr by Lost Amt (g)	216
158	Top Acct Mgr by Probable Amt (g)	217
159	Top Acct Mgr by Sales Growth in a Period (g)	218
160	Top Acct Mgr by Sales Decline in a Period (g)	219
161	Top Acct Mgr by Lost Sales Growth in a Period (g)	220
162	Top Acct Mgr by Lost Sales Decline in a Period (g)	221
163	Win vs. Loss by Acct Manager (g)	222
164	Win vs. Loss by Territory (g)	223
165	Win vs. Loss by Department (g)	224
	Reports by Account/Customer	
166	Average Time Elapsed per Opportunity by Account	225
167	Account Overview - Opport & Cases (g)	226
168	Account Overview - All Opportunities	227
169	Account Overview - Top Open Amts	228
170	Open Amt & Open Opport Count by Account	229
171	Open Amt by Account and Close Probability	230
172	Open Amt by Account and Decision Frame	231
173	Open and Probable Amt by Account w/ OpenSuppCases	232
174	Open and Probable Amt by Account Type (g)	233
175	Open and Probable by Account + Cases	234
176	Opportunity Count by Account w/ OpenSuppCases	235
177	Probable Amt by Account w/ OpenSuppCases	236
178	Probable Amt by Account + Support Cases	237
179	Sales, Open and Probable Amt by Account w/ OpenSuppCases	238
180	Sales by Account	239
181	Sales by Account Region	240
182	Sales Forecast by Close Date and Account w/ OpenSuppCases	241
183	Top Accounts by Sales (g)	242
184	Top Accounts by Open Amt (w/ OpenSuppCases) (g)	243
185	Top Accounts by Lost Amt (w/ OpenSuppCases) (g)	244
186	Top Accounts by Probable Amt + Support Cases (g)	245
187	Top Accounts by Sales Growth in a Period (g)	246
188	Top Accounts by Sales Decline in a Period (g)	247
189	Top Accounts by Lost Sales Growth in a Period (g)	248
190	Top Accounts by Lost Sales Decline in a Period (g)	249
191	Win vs. Loss by Account Type (g)	250
192	Win vs. Loss by Account (g)	251
193	Win vs. Loss by Account Region (g)	252
	Reports by Campaign	
194	Average Time Elapsed per Opportunity by Campaign	253
195	Campaign Overview - Opport & Cases (g)	254
196	Campaign Overview - All Opportunities	255
197	Campaign Overview - Top Open Amts	256
198	Open Amt by Campaign and Close Probability	257
199	Open Amt by Campaign and Decision Frame	258
200	Open Amt & Open Opport Count by Campaign (g)	259

201	Open Amt & Open SuppCases Count by Campaign (g)	260
202	Open and Probable Amt by Campaign	261
203	Open and Probable Amt by Department (g)	262
204	Opportunities by Account Sliced by Campaign	263
205	Opportunity Categorization by Campaign - Stacked (g)	264
206	Opportunity Count by Campaign	265
207	Probable Amt and Open Opport Count by Campaign	266
208	Sales, Open and Probable Amt by Campaign	267
209	Sales by Campaign	268
210	Sales Forecast by Close Date and Campaign	269
211	Territory Pie Chart by Opport Amt (g)	270
212	Top Campaign by Sales (g)	271
213	Top Campaign by Open Amt (g)	272
214	Top Campaign by Lost Amt (g)	273
215	Top Campaign by Probable Amt (g)	274
216	Top Campaign by Sales Growth in a Period (g)	275
217	Top Campaign by Sales Decline in a Period (g)	276
218	Top Campaign by Lost Sales Growth in a Period (g)	277
219	Top Campaign by Lost Sales Decline in a Period (g)	278
220	Win vs. Loss by Campaign (g)	279
Misc Reports		
221	Lead Source Pie Chart (g)	280
222	Opportunity Type Pie Chart (g)	281
223	Product Pie Chart (g)	282
224	Sales Cycle Pie Chart (g)	283
225	Sales Forecast by Close Date (g)	284
226	Win vs. Loss by Close Date (g)	285
227	Win vs. Loss by Opport Type (g)	286
228	Win vs. Loss by Lead Source (g)	287
Reports by Account Region		
229	Account Region Overview (g)	288
230	Open Amt by Account Region and Close Probability	289
231	Open Amt by Account Region and Decision Frame	290
232	Open and Probable Amt by Account Region	291
233	Opportunity Categorization by Account Region - Stacked (g)	292
234	Opportunity Count by Account Region	293
235	Probable Amt by Account Region	294
236	Sales, Open and Probable Amt by Account Region	295
237	Sales by Account Region (g)	296
238	Sales Forecast by Close Date and Account Region	297
239	Top Account Regions by Sales (g)	298
240	Top Account Regions by Open Amt (g)	299
241	Top Account Regions by Lost Amt (g)	300
242	Top Account Regions by Probable Amt (g)	301
243	Win vs. Loss by Account Region (g)	302
Reports by Product		
244	Product Overview - All Opportunities	303
245	Product Overview - Top Open Amts	304
246	Open Amt by Product and Close Probability	305
247	Open Amt by Product and Decision Frame	306
248	Open Amt & Open Opport Count by Product	307
249	Open and Probable Amt by Product	308
250	Sales, Open and Probable Amt by Product	309
251	Sales by Product	310
252	Sales Forecast by Close Date and Product	311
253	Top Products by Lost Amt (g)	312
254	Top Product by Open Amt (g)	313
255	Top Product by Sales (g)	314
256	Win vs. Loss by Product (g)	315

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
	Target Close Date	
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
	Account/Customer	
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
	CRM Support Case Details	
104	Case Description	419
105	Case Id	420
106	Priority	421
107	Problem Type	422
108	Solution Type	423
109	Stage	424

110	Status	425
111	Support Rep	426
	Support Rep	
112	Department	427
113	Support Rep with Open Support Cases	428
114	Support Rep with Opportunity Amt	429
115	Support Rep Name	430
116	Territory	431
117	Title	432
	Reports by Account/Customer	
118	Avg Resolution Time by Account Region (g)	433
119	Case Count Change by Account Region by Period (g)	434
120	Case Count Change by Account Type by Period (g)	435
121	Cases Overview by Account w/ OppAmt	436
122	Cases Overview by Account w/ OppAmt and Problem Type	437
123	Cases Overview by Account Region - Bars (g)	438
124	Cases Overview by Account Region - Stacked (g)	439
125	Cases Overview by Account Type - Bars (g)	440
126	Cases Overview by Account Type - Stacked (g)	441
127	Historic Cases and Resolution Time sliced by Account Region (g)	442
128	Historic Case Count by Account Type and Period (g)	443
129	Open Cases by Account w/ OppAmt	444
130	Open Cases by Account w/ OppAmt and Case Stage	445
	Misc Reports	
131	Historic Case Count & Avg Resolution Time by Period (g)	446
132	Cases by Stage by Year - Stacked (g)	447
	Reports by Problem Type	
133	Avg Resolution Time by Problem Type (g)	448
134	Cases by Problem and Solution Type	449
135	Case Count Change by Problem Type by Period (g)	450
136	Cases Overview by Problem Type - Bars (g)	451
137	Cases Overview by Problem Type - Stacked (g)	452
138	Cases Overview by Problem Type and SuppRep	453
139	Historic 1st Call Resolution Count by Problem Type and Period (g)	454
140	Historic Avg Resolution Time by Problem Type - Horizontal (g)	455
141	Historic Avg Resolution Time by Problem Type - Vertical (g)	456
142	Historic Cases and Resolution Time sliced by Problem Type (g)	457
143	Historic Case Count & Avg Resolution Time by Problem Type (g)	458
144	Historic Case Count by Problem Type and Period (g)	459
145	Open and Closed Cases by Problem Type	460
146	Performance by Problem Type (g)	461
147	Performance Map: Case Count and Pct Closed by Problem Type (g)	462
148	Performance Map: Case Count and Avg Resolution Time by Problem Type (g)	463
	Reports by Support Rep	
149	Avg Resolution Time by SuppRep (g)	464
150	Count Case and Avg Resolution Time by SuppRep (g)	465
151	Case Count Change by SuppRep by Period (g)	466
152	Cases Overview by SuppRep - Bars (g)	467
153	Cases Overview by SuppRep - Stacked (g)	468
154	Cases Overview by Problem Type and Account w/ OppAmt	469
155	Cases Overview by SuppRep and Problem Type	470
156	Historic 1st Call Resolution Count by SuppRep and Period (g)	471
157	Historic Avg Resolution Time by SuppRep (g)	472
158	Historic Case Count by SuppRep and Period (g)	473
159	Historic Cases and Resolution Time sliced by SuppRep (g)	474
160	Open and Closed Cases by SuppRep (g)	475
161	Open Cases by SuppRep, Account w/ OppAmt, and Case Stage	476
162	Open Cases by SuppRep, Account w/ OppAmt, and Problem Type	477
163	Open Cases by SuppRep, Account w/ OppAmt, and Priority	478
164	Performance by SuppRep	479

165	Performance Map: Case Count and Avg Resolution Time by SuppRep (g)	480
166	Performance Map: Case Count and Pct Closed by SuppRep (g)	481

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 —officialll and —provisionall 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
	Example of Sales Commission Reports	
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
GL Transaction Reports		
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
17	Company Id Name	677
18	Company Name	678
Document Date		
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
Product		
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
Warehouse		
54	Warehouse Name	714
55	Warehouse Id	715
56	Warehouse Id Name	716
Inventory History Reports		
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
61	Avg Nbr of Days in Stock by Product Line	721
62	Avg Nbr of Days in Stock by Warehouse	722
63	Avg Nbr of Days in Stock by Warehouse and Product	723
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
On Hand Today Reports		
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
Top and Bottom Performers Reports		
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
Dimensions, Hierarchies and Attributes		
Company		
17	Company Id	791
18	Company Id Name	792
19	Company Name	793
Activity Date		
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
Product		
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
Warehouse		
55	Warehouse Name	829
56	Warehouse Id	830
57	Warehouse Id Name	831
Inventory Projection Reports		

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
Dimensions, Hierarchies and Attributes		
Company		
16	Company Id	885
17	Company Id Name	886
18	Company Name	887
Date Required		
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
Product		
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
PO Line		
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
	Vendor	
65	Payment Terms	934
66	Vendor Name	935
67	Vendor Id	936
68	Vendor Id Name	937
	Warehouse	
69	Warehouse Id	938
70	Warehouse Id Name	939
71	Warehouse Name	940
	Open PO Details Reports	
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
	Reports by Product	
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
	Top and Bottom Performers Reports	
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
	Reports by Vendor	

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
Reports by Warehouse		
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
	Payables Line	
40	Days Late	1044
41	Document Date	1045
42	Document Number	1046
43	Due Date	1047
44	Payment Status	1048
45	Vendor	1049
	Vendor	
46	Payment Terms	1050
47	Vendor Name	1051
48	Vendor Id	1052
49	Vendor Id Name	1053
	Payables Reports	
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
Dimensions, Hierarchies and Attributes		
Company		
22	Company Id	1105
23	Company Id Name	1106
24	Company Name	1107
Customer		
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
Estimated Start Date		
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
	Actual Start Date	
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
	Estimated Completion Date	
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
	Actual Completion Date	
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
	Project/Cost	
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
	Reports by Company	
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 Nbr of Days to Receive	1270
14	Nbr of Documents	1271
15	Nbr 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
	Salesperson	
73	Salesperson Id	1330
74	Salesperson Id Name	1331
75	Salesperson Name	1332
	Reports by Company	
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 Nnbr of Days to Receive	1345
89	Nnbr of Documents	1346
90	Nnbr of Unique Customers	1347
	Reports by Customer	
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-Document by Customer	1354
98	Avg -Balance-per-Document by Customer Region	1355
99	Avg -Nnbr- of -Days-to-Receive by Customer , Paid Invoices	1356
100	Avg -Nnbr- 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	Nnbr of Customers with Receivables by Period Due (g)	1364
108	Nnbr of Customers with Receivables by Period Due, Customer Region sliced (g)	1365
109	Nnbr of Customers with Receivables by Period Due, Salespeople sliced (g)	1366
110	Nnbr 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
Receivables Details Reports		
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
Reports by Salesperson		
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
Top and Bottom Performers Reports		
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
Document Date		
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
Product		
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
Sales Header		
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
	Sales Line	
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
	Salesperson	
197	Salesperson Id	1608
198	Salesperson Id Name	1609
199	Salesperson Name	1610
	Ship-To	
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
	Warehouse	
207	Warehouse Id	1618
208	Warehouse Id Name	1619
209	Warehouse Name	1620
	Reports by Company	
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
215	Monthly Sales & Gross Profit Pct, Company sliced	1626
216	Monthly Gross Profit Comparison, Company sliced	1627
217	Performance Map by Company- Sales and Gross Profit (g)	1628
218	Monthly Sales by Company (g)	1629
219	Monthly Sales Comparison, Company sliced (g)	1630
220	Sales This Period vs. Same Period Prior Year , Company sliced (g)	1631
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
226	Nmbr of Invoices by Invoice Size, Company sliced (g)	1637
227	Nmbr of Invoices & Gross Profit by Invoice Size, Company sliced (g)	1638
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
235	Monthly Returns by Company (g)	1646
236	Accrued Monthly Returns, Company sliced (g)	1647
237	Yearly Returns by Company (g)	1648

238	Yearly Gross Profit by Company (g)	1649
239	Yearly Gross Profit Amt and Pct, Company sliced (g)	1650
240	Yearly Qty Sold and Avg Unit Price, Company sliced (g)	1651
241	Yearly Sales and Gross Profit , Company sliced (g)	1652
242	Yearly Sales and Sales Growth , Company sliced (g)	1653
243	Yearly Sales by Company (g)	1654
244	Yearly Sales , Gross Profit Amt and Pct, Company sliced (g)	1655
Reports by Customer		
Counts		
245	Avg Nmbr of Days between Sales by Customer	1656
246	Monthly Nmbr of Invoices , Customer sliced (g)	1657
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
254	Nmbr of Unique Products Sold by Customer	1665
255	Nmbr of Unique Salespeople by Customer	1666
Gross Profit		
256	Accrued Monthly Sales and Gross Profit , Customer sliced (g)	1667
257	Customer Perspective- Avg Sales Amt per Invoice and Pct G P (g)	1668
258	Monthly Gross Profit Comparison, Customer sliced (g)	1669
259	Monthly Sales and Gross Profit , Customer sliced (g)	1670
260	Monthly Sales and Gross Profit Pct, Customer sliced (g)	1671
261	Yearly Gross Profit by Customer	1672
262	Yearly Gross Profit Amt and Pct (g)	1673
263	Yearly Sales and Gross Profit (g)	1674
264	Yearly Sales , Gross Profit Amt and Pct (g)	1675
Returns		
265	Accrued Monthly Returns, Customer sliced (g)	1676
266	Monthly Returns, Customer sliced (g)	1677
267	Yearly Returns by Customer	1678
Sales		
268	Accrued Daily Sales , Quarter Comparison, Customer sliced (g)	1679
269	Accrued Daily Sales , Year Comparison, Customer sliced (g)	1680
270	Accrued Monthly Sales , Customer sliced (g)	1681
271	Avg Daily Sales Amt by Customer	1682
272	Avg Monthly Sales Amt by Customer	1683
273	Avg Monthly Sales Amt by Customer and Product	1684
274	Customer Size by Quarter	1685
275	Customer Size by Quarter, Customer Size sliced (g)	1686
276	Customers with Sales Last Days, No Sales Last Days	1687
276	Customers with Sales Last Days, No Sales Last Days	1687
277	Sales by Customer Age and Quarter	1688
278	Customers by Volume of Sales and Quarter	1689
279	Customers by Sales Frequency and Quarter	1690
280	Monthly Sales Comparison, Customer sliced (g)	1691
281	Monthly Sales and Sales Growth from Prior Period, Customer sliced (g)	1692
282	Monthly Sales by Credit Limit , Customer Type sliced (g)	1693
283	Monthly Sales by Customer Type (g)	1694
284	Monthly Sales by Payment Terms Code, Customer Type sliced (g)	1695
285	Monthly Sales , Customer sliced (g)	1696
286	Sales by Customer	1697
287	Sales by Customer with Sales Growth Flags(f)	1698
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

292	Sales by Customer Type and Product Line	1703
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
297	Yearly Qty Sold and Avg Unit Price, Customer sliced (g)	1708
298	Yearly Sales by Customer	1709
299	Yearly Sales and Sales Growth , Customer sliced (g)	1710

Reports by Customer Region

By Geography

300	Accrued Daily Sales , Quarter Comparison, Cst Region sliced (g)	1711
301	Accrued Daily Sales , Year Comparison, Cst Region sliced (g)	1712
302	Accrued Monthly Sales by Region, Measures sliced (g)	1713
303	Accrued Monthly Sales and Gross Profit by Region, Measures sliced (g)	1714
304	Accrued Monthly Returns by Region, Measures sliced (g)	1715
305	Decomposition Tree-Sales This Year (g)	1716
306	Customer Size by Quarter, Cst Region and Size sliced (g)	1717
307	Product Sales Size by Quarter, Cst Region and Sales Size sliced (g)	1718
308	Monthly Gross Profit Comparison by Region (g)	1719
309	Monthly Invoice Count by Region (g)	1720
310	Monthly Returns by Region (g)	1721
311	Monthly Sales and Gross Profit by Region (g)	1722
312	Monthly Sales and Gross Profit Pct, Cst Region sliced (g)	1723
313	Monthly Sales and Sales Growth from Prior Period, Cst Region sliced (g)	1724
314	Monthly Sales by Region (g)	1725
315	Monthly Sales Comparison by Region (g)	1726
316	Nmbr of Invoices by Invoice Size and Region (g)	1727
317	Nmbr of Invoices by Invoice Size and Region, Measures sliced (g)	1728
318	Nmbr of Unique Salespeople with Sales by Region (g)	1729
319	Nmbr of Unique Customers with Sales and Sales Size by Region (g)	1730
320	Nmbr of Unique Customers with Sales by Region (g)	1731
321	Nmbr of Unique Products Sold by Region (g)	1732
322	Performance Map by Region- Sales and Gross Profit (g)	1733
323	Sales by Customer Region with Sales Growth Flags(g, f)	1734
324	Sales This Period vs. Prior Period, Cst Region sliced (g)	1735
325	Sales This YTD vs. Prior YTD , Cst Region sliced (g)	1736
326	Sales This Period vs. Same Period Prior Year , Cst Region sliced (g)	1737
327	Yearly Sales Share by Region (g)	1738
328	Yearly Sales , Gross Profit Amt and Pct, Cst Region sliced (g)	1739
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
335	Yearly Gross Profit Amt and Pct, Cst Region sliced (g)	1746
336	Yearly Gross Profit by Region (g)	1747

By Territory

337	Accrued Daily Sales , Quarter Comparison, Territory sliced (g)	1748
338	Accrued Daily Sales , Year Comparison, Territory sliced (g)	1749
339	Accrued Monthly Sales by Territory, Measures sliced (g)	1750
340	Accrued Monthly Sales and Gross Profit by Territory, Measures sliced (g)	1751
341	Accrued Monthly Returns by Territory, Measures sliced (g)	1752
342	Decomposition Tree- Sales This Year (g)	1753
343	Customer Size by Quarter, Territory and Size sliced (g)	1754
344	Product Sales Size by Quarter, Territory and Sales Size sliced (g)	1755
345	Monthly Gross Profit Comparison by Territory (g)	1756
346	Monthly Invoice Count by Territory (g)	1757
347	Monthly Returns by Territory (g)	1758
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
359	Performance Map by Territory- Sales and Gross Profit (g)	1770
360	Sales by Territory with Sales Growth Flags (g)	1771
361	Sales This Period vs. Prior Period, Territory sliced (g)	1772
362	Sales This YTD vs. Prior YTD , Territory sliced (g)	1773
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
371	Yearly Gross Profit Share by Territory (g)	1782
372	Yearly Gross Profit Amt and Pct, Territory sliced (g)	1783
373	Yearly Gross Profit by Territory (g)	1784

Reports by Product

Counts

374	Avg Nmbr of Days between Sales by Product	1785
375	Invoice Size and Sales , Product sliced (g)	1786
376	Monthly Invoice Count, Product sliced (g)	1787
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
384	Nmbr of Unique Salespeople by Product	1795

Gross Profit

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
391	Yearly Gross Profit Amt and Pct, Product sliced (g)	1802
392	Yearly Sales and Gross Profit , Product sliced (g)	1803
393	Yearly Sales , Gross Profit Amt and Pct, Product sliced (g)	1804

Qty Shipped and Returns

394	Accrued Monthly Return Amt, Product sliced (g)	1805
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
400	Monthly Qty Shipped, Product sliced (g)	1811
401	Yearly Returns by Product	1812
402	Yearly Qty Shipped and Avg Unit Price, Product sliced (g)	1813
403	Yearly Qty Shipped and Shipped Growth , Product sliced (g)	1814

Sales

404	Accrued Daily Sales , Quarter Comparison, Product Line sliced (g)	1815
405	Accrued Daily Sales , Year Comparison, Product Line sliced (g)	1816
406	Accrued Monthly Sales , Product sliced (g)	1817
407	Avg Daily Sales Amt by Product	1818
408	Avg Monthly Sales Amt by Product	1819
409	Avg Monthly Sales Amt by Product and Customer	1820
410	Products with Sales Last Days, No Sales Last Days	1821
410	Products with Sales Last Days, No Sales Last Days	1821
411	Product Lines with Sales Last Days, No Sales Last Days	1822
412	Product Sales Size by Quarter	1823
413	Product Sales Size by Quarter, Sales Size sliced (g)	1824
414	Monthly Sales , Product sliced (g)	1825
415	Monthly Sales Comparison, Product sliced (g)	1826
416	Monthly Sales & Sales Growth from Prior Period, Product sliced (g)	1827
417	Monthly Sales by Product Line (g)	1828
418	Sales by Product	1829
419	Sales by Product and Customer	1830
420	Sales by Product Line	1831
421	Sales by Product Line and Customer	1832
422	Sales by Product Line and Customer Type	1833
423	Sales by Product Line, Product and Customer	1834
424	Sales by Product with Sales Growth Flags(f)	1835
425	Sales by Product Line with Sales Growth Flags(f)	1836
426	Sales This Period vs. Prior Period, Product sliced (g)	1837
427	Sales This Period vs. Same Period Prior Year , Product sliced (g)	1838
428	Sales This YTD vs. Prior YTD , Product sliced (g)	1839
429	Yearly Sales by Product	1840
430	Yearly Sales and Sales Growth , Product sliced (g)	1841

Reports by Salesperson

Counts

431	Avg Nmbr of Days between Sales by Salesperson	1842
432	Monthly Invoice Count, Salesperson sliced (g)	1843
433	Nmbr of Invoices by Invoice Size, Salesperson sliced (g)	1844
434	Nmbr of Invoices by Invoice Size and Salesperson	1845
435	Nmbr of Invoices and Gross Profit by Invoice Size, Salesperson sliced (g)	1846
436	Nmbr of Invoices and Sales by Invoice Size, Salesperson sliced (g)	1847
437	Nmbr of Invoices and Sales Size, Salesperson sliced (g)	1848
438	Nmbr of Invoices, GP Amt and Pct by Invoice Size, Salesperson sliced (g)	1849
439	Nmbr of Invoices, Sales and GP by Invoice Size, Salesperson sliced (g)	1850
440	Nmbr of Invoices by Salesperson (g)	1851
441	Nmbr of Unique Customers by Salesperson	1852
442	Nmbr of Unique Products Sold by Salesperson	1853

Gross Profit

443	Accrued Monthly Sales and Gross Profit , Salesperson sliced (g)	1854
444	Monthly Gross Profit Comparison, Salesperson sliced (g)	1855
445	Monthly Sales and Gross Profit , Salesperson sliced (g)	1856
446	Monthly Sales and Gross Profit Pct, Salesperson sliced (g)	1857
447	Salesperson Perspective- Avg Sales Amt per Invoice and Pct G P (g)	1858
448	Yearly Gross Profit by Salesperson	1859
449	Yearly Gross Profit Amt and Pct, Salesperson sliced (g)	1860
450	Yearly Sales and Gross Profit , Salesperson sliced (g)	1861
451	Yearly Sales , Gross Profit Amt and Pct, Salesperson sliced (g)	1862

Qty Shipped and Returns

452	Accrued Monthly Returns by Salesperson (g)	1863
453	Monthly Returns by Salesperson (g)	1864
454	Yearly Returns by Salesperson	1865
455	Yearly Qty Shipped and Avg Unit Price, Salesperson sliced (g)	1866

Sales

456	Accrued Daily Sales , Quarter Comparison, Salesperson sliced (g)	1867
457	Accrued Daily Sales , Year Comparison, Salesperson sliced (g)	1868

458	Accrued Monthly Sales by Salesperson (g)	1869
459	Avg Daily Sales Amt by Salesperson	1870
460	Avg Monthly Sales Amt by Salesperson	1871
461	Avg Monthly Sales Amt by Salesperson and Product	1872
462	Customer Size by Salesperson and Quarter, Measure sliced (g)	1873
463	Product Sales Size by Salesperson and Quarter, Measure sliced (g)	1874
464	Monthly Sales Comparison, Salesperson sliced (g)	1875
465	Monthly Sales by Salesperson (g)	1876
466	Monthly Sales and Sales Growth from Prior Period, Salesperson sliced (g)	1877
467	Sales by Salesperson	1878
468	Sales by Salespeople with Sales Growth Flags(f)	1879
469	Sales by Salesperson and Customer	1880
470	Sales by Salesperson, Customer and Product	1881
471	Sales by Salesperson, Customer and Product Line	1882
472	Sales by Salesperson and Customer Type	1883
473	Sales by Salesperson, Customer Type and Product	1884
474	Sales by Salesperson, Customer Type and Product Line	1885
475	Sales by Salesperson and Product	1886
476	Sales by Salesperson, Product and Customer	1887
477	Sales by Salesperson and Product Line	1888
478	Sales by Salesperson, Product Line and Product	1889
479	Sales by Salesperson, Product Line and Customer	1890
480	Sales This Period vs. Prior Period, Salesperson sliced (g)	1891
481	Sales This Period vs. Same Period Prior Year , Salesperson sliced (g)	1892
482	Sales This YTD vs. Prior YTD , Salesperson sliced (g)	1893
483	Stacked Accrued Sales by Salesperson by Period (g)	1894
484	Stacked Sales by Salesperson by Period (g)	1895
485	Yearly Sales and Sales Growth , Salesperson sliced (g)	1896
486	Yearly Sales by Salesperson (g)	1897
Reports by Ship-To		
487	Sales by Customer Ship-To	1898
488	Sales by Customer Ship-To and Product	1899
489	Sales by Product and Customer Ship-To	1900
490	Sales by Salesperson, Customer Ship-To and Product	1901
491	Sales by Salesperson, Product and Customer Ship-To	1902
492	Sales by Warehouse and Customer Ship-To	1903
493	Sales by Customer Ship-To	1904
494	Sales by Customer Ship-To and Product	1905
495	Sales by Product and Customer Ship-To	1906
496	Sales by Salesperson, Product and Customer Ship-To	1907
497	Sales by Salesperson, Customer Ship-To and Product	1908
498	Sales by Warehouse and Customer Ship-To	1909
Sales Details		
499	Sales Detail Cube Definitions	1910
500	Sales Detail Cube-Query Reset	1911
501	Sales Details in a Period by Customer	1912
502	Sales Details in a Period by Customer and Product	1913
503	Sales Details in a Period by Customer and Product Line	1914
504	Sales Details in a Period by Customer , Product Line and Product	1915
505	Sales Details in a Period by Product	1916
506	Sales Details in a Period by Product and Customer	1917
507	Sales Details in a Period by Product and Salesperson	1918
508	Sales Details in a Period by Product, Salesperson and Customer	1919
509	Sales Details in a Period by Product Line and Customer	1920
510	Sales Details in a Period by Product Line and Product	1921
511	Sales Details in a Period by Product Line and Salesperson	1922
512	Sales Details in a Period by Product Line, Customer and Product	1923
513	Sales Details in a Period by Product Line Product and Customer	1924
514	Sales Details in a Period by Product Line, Product and Salesperson	1925
515	Sales Details in a Period by Product Line, Salesperson and Product	1926

516	Sales Details in a Period by Salesperson	1927
517	Sales Details in a Period by Salesperson and Customer	1928
518	Sales Details in a Period by Salesperson, Customer and Product	1929
519	Sales Details in a Period by Salesperson, Customer and Product Line	1930
520	Sales Details in a Period by Salesperson and Product	1931
521	Sales Details in a Period by Salesperson, Product and Customer	1932
522	Sales Details in a Period by Salesperson and Product Line	1933
523	Sales Details in a Period by Salesperson, Product Line and Product	1934
524	Sales Details in a Period by Warehouse and Product	1935
525	Sales Details in a Period by Warehouse and Product Line	1936

Top and Bottom Performers

Customers

526	Nmbr of Invoices by Invoice Size and Top Customers (g)	1937
527	Sales of Top Customers by Top Products	1938
528	Sales by Top Customers This Year and Product	1939
529	Sales by Top Customers This Year and Salesperson	1940
530	Stacked Accrued Sales by Top Customers This Year by Period (g)	1941
531	Stacked Sales by Top Customers by Salesperson (g)	1942
532	Stacked Sales by Top Customers This Year by Customer Type (g)	1943
533	Stacked Sales by Top Customers This Year by Period (g)	1944
534	Stacked Sales by Top Customers This Year by Top Products (g)	1945
535	Top Customers by Avg Monthly Sales Amt Decrease (\$000/mo)	1946
536	Top Customers by Avg Nmbr of Days between Sales Decrease (days)	1947
537	Top Customers by Nmbr of Invoices This Year (g)	1948
538	Top Customers by Nmbr of Large Invoices This Year (g)	1949
539	Top Customers by Nmbr of Small Invoices This Year (g)	1950
540	Top Customers by Nmbr of Unique Products This Year (g)	1951
541	Top Customers by Return Amt This Year (g)	1952
542	Top Customers by Gross Profit Last Year (g)	1953
543	Top Customers by Gross Profit This Year (g)	1954
544	Top Customers by Lowest Gross Profit Last Year (g)	1955
545	Top Customers by Lowest Gross Profit This Year (g)	1956
546	Top Customers by Sales Amt Decrease This Year vs. Prior Year (g)	1957
547	Top Customers by Sales Amt Decrease This YTD vs. Prior YTD (g)	1958
548	Top Customers by Sales Amt Increase This Year vs. Prior Year (g)	1959
549	Top Customers by Sales Amt Increase This YTD vs. Prior YTD (g)	1960
550	Top Customers by Sales Last Year (g)	1961
551	Top Customers by Sales This Year (g)	1962
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

Products

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
Salespeople		
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
Advanced Analysis		
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
	Dimensions, Hierarchies and Attributes	
	Company	
25	Company Id	2135
26	Company Id Name	2136
27	Company Name	2137
	Customer	
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
	Document Date	
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
	Expected Ship Date	
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
	Product	
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
	Sales Order Line	
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
	Salesperson	
119	Salesperson Id	2229
120	Salesperson Id Name	2230
121	Salesperson Name	2231

	Warehouse	
122	Warehouse Id	2232
123	Warehouse Id Name	2233
124	Warehouse Name	2234
	Reports by Company	
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
	Reports by Customer	
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
	Reports by Customer Region	
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
	Reports by Product	
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
Reports by Salesperson		
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
Sales Order Details Reports		
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
Top and Bottom Performers Reports		
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

End of document