Accelerate Sales Insights Package

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Accelerate Sales Insights Package

This package helps you get started with the analytical capabilities of Pricefx. It allows you to set up all necessary data structures to be able to start quickly analyzing sales data – with minimum effort and limited requirements for the initial data set.

- Overview (Sales Insights)
- Business User Reference (Sales Insights)
- Admin User Reference (Sales Insights)
- Technical User Reference (Sales Insights)
- Release Notes (Sales Insights)
- Archive of Documentation (Sales Insights)

> Please keep in mind that Sales Insights Package and Customer Insights Package share a common library – therefore if both are in use at a partition, they both need to be deployed in their most recent versions.

Overview (Sales Insights)

The Sales Insight Accelerator is one of many pre-built solutions from Pricefx that when implemented will provide a customer with a quicker path to analyse transactions with a set of dashboard focused on pricing.

Pricefx Key Accelerators

You can also watch a video introducing Sales Insights Accelerator and its benefits.

In this section:

- Business Overview (Sales Insights)
- Accelerator Solution Capabilities (Sales Insights)
- Value Measurement (Sales Insights)
- User Stories (Sales Insights)

Business Overview (Sales Insights)

Premise

You are involved with the review of analytics associated with pricing applications as part of a team from either Pricing, Financial, Sales, or IT support within your organization.

Desired Outcome

You need to find the next opportunity for your profit growth with the set of dashboards analyzing the product and customer profitability and related margin leakages. Additionally, you can identify margin outliers with ease and be navigated into revenue and margin breakdown/causalities.

Context and Background

After loading the product, customer, and transactional history into Pricefx and creating a Datamart, you are ready to begin to analyze these transactions for insights into your operations. There should be a standard set of dashboards that focus on providing insights into revenue and margins.

Problem

You need to recognize trends so that you can adjust your strategies to adjust to opportunities and challenges in the market. You need to deploy proven analytics that provide data accuracy and data quality to allow enterprises to make accurate business decisions.

Solution Capabilities

Once this accelerator has been implemented and linked to your Datamart, then analytical dashboards will be available and each comes with its own specific functional capabilities:

- Analyze the relationship between revenue and margin % from a multitude of perspectives
- Identify best and worst-performing outliers for products and customers
- Provide waterfall analytics
- Discover reasons for revenue or margin differences between two selected periods
- Visualization of KPIs using geographic locations
- Perform waterfall comparisons over time for customers or products

Accelerator Solution Capabilities (Sales Insights)

Accelerate Sales Insights Package comes with several dashboards (or pre-defined analyses) and additional standard analysis templates which every company can benefit from.

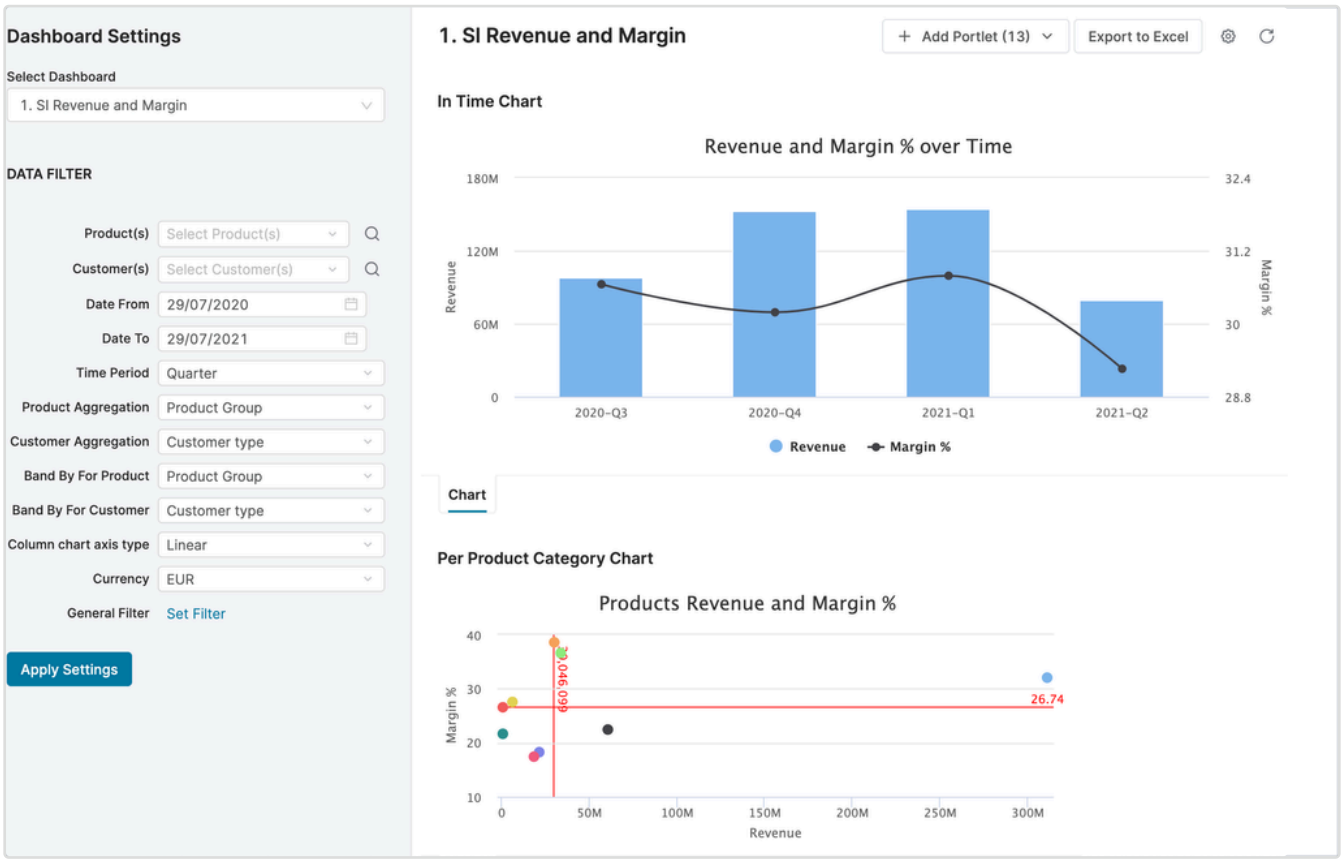
- Pricing Dashboards
- Charts
- Audience
- Entitlement

This package includes:

- Revenue and profitability over time and by geography
- Highest and lowest performing products and customers
- Price waterfall analysis and comparisons per time, product and customer
- Revenue and margin breakdowns

These analyses can help you recognize trends so that you can adjust strategies to reflect opportunities or challenges in the market. Of course, companies will want to go further, so that is where the additional ad-hoc analytics capabilities come into play.

The out-of-the-box standard analysis templates enable pricing analysts and pricing managers to drill deeper into their company's data (across products, customers, and transactions), uncovering hidden insights and validating what they see on those dashboards.



Example of Revenue and Margin analysis

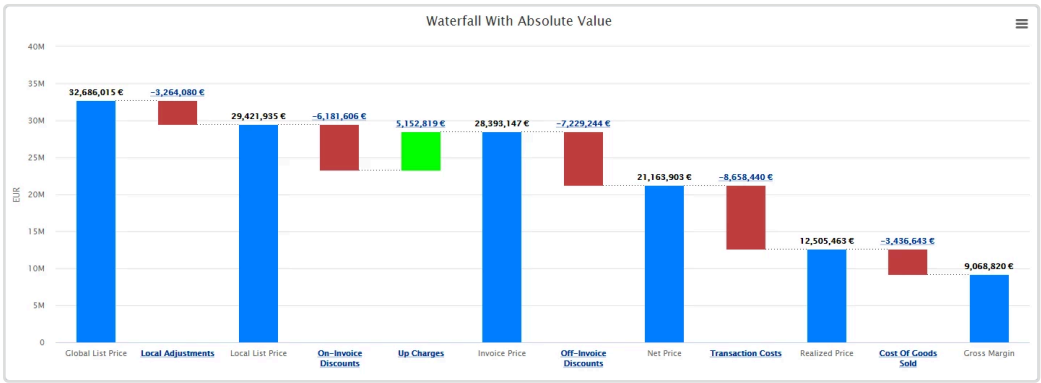
The difference between the Sales Insights and Sales Insights Dashboards accelerators is:

- **Sales Insights Dashboards** – Contains only the Dashboards, and you must already have data tables available on your partition.
- **Sales Insights** – Installation will prompt you to supply the data in CSV format, so the installation process will also create the tables for you.

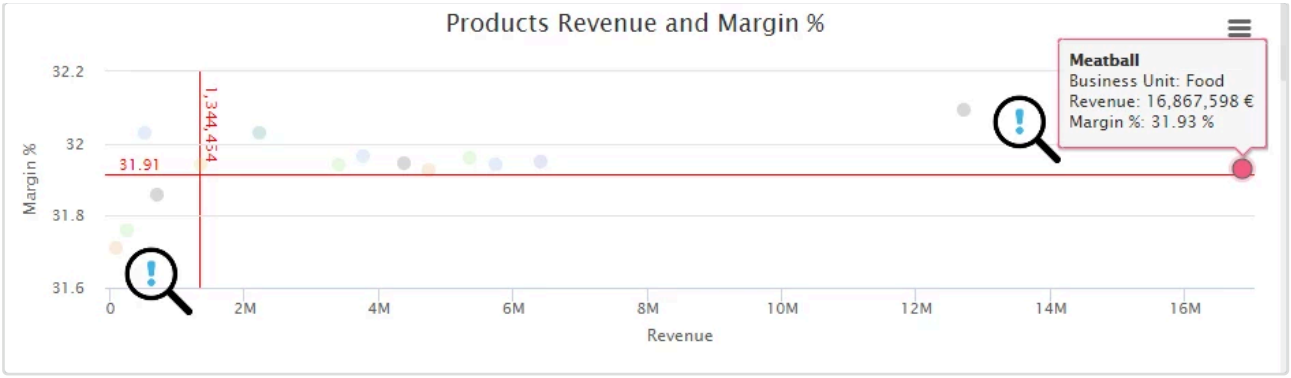
Pricing Dashboards

You can find opportunities for your profit growth with the set of dashboards analyzing the product and customer profitability and related margin leakages. They allow you to identify margin outliers with ease and navigate you into revenue and margin breakdown / causalities.

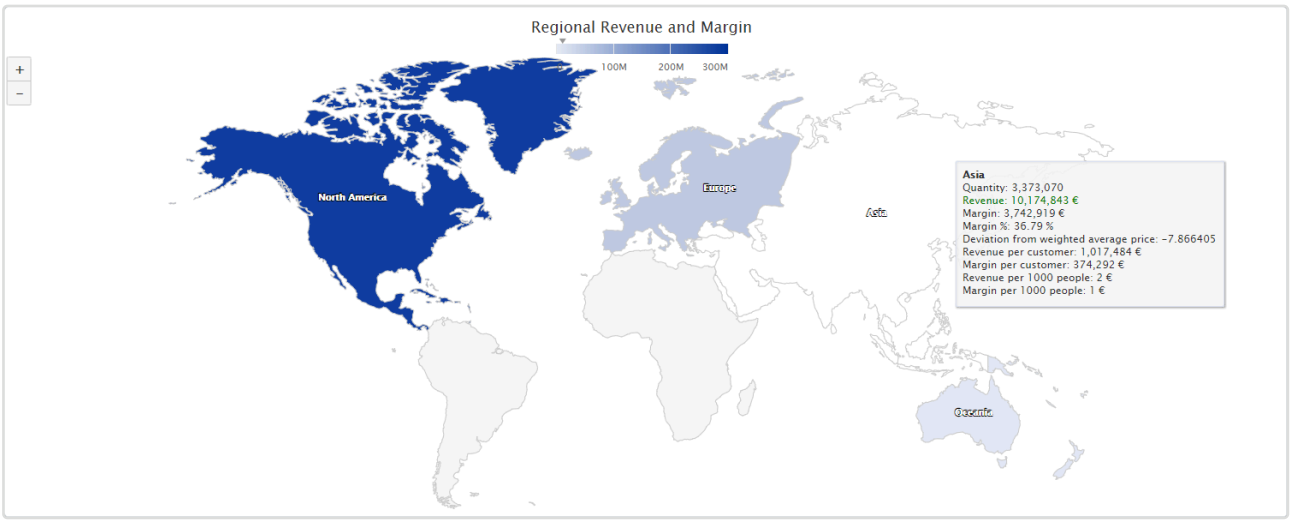
Dashboard	Description	Business User Reference
Revenue and Margin	Analyzes the relationship between revenue and margin % from various perspectives.	Revenue and Margin Dashboard
Regional Revenue and Margin	Analyse how revenue is split across regions	Regional Revenue and Margin
Outliers	Analyzes the best and worst performing products and customers.	Outliers Dashboard
Waterfall	Provides waterfall analysis with grouped adjustments and their details.	Waterfall Dashboard
Waterfall Comparison	Compares waterfall analysis per time, product or customer.	Waterfall Comparison
Revenue Breakdown	Uncover reasons for the difference in revenue between the two selected periods.	Revenue Breakdown
Margin Breakdown	Uncover reasons for the difference in margin between the two selected periods.	Margin Breakdown
Causality Dashboard	Shows KPIs visualized in a world or continental maps.	Regional Revenue and Margin
Period Over Period Dashboard	Analyze trends and changes between periods	Period Over Period Dashboard



Example of Waterfall analysis



Example of Product Revenue and Margin analysis



Example of Regional Revenue and Margin analysis

Charts

Chart	Goal	Capability
Revenue & Margin by Time	Analyze revenue and margin % achieved during a given period, with the possibility to change the time dimension for aggregation.	Understand the revenue and margin trends for the business and decide on corrective actions.
Revenue & Margin by Customer or Product	Analyze revenue and margin % achieved by a Customer/Product with visualization of the lowest 10%.	Understand the lowest performing products and decide on corrective actions.
Revenue & Margin Contribution by Customer or Product	Analyze contribution of Customers/Products to the total revenue and margin split into 10 buckets (from 10% to 100%), with the option to drill down to see the top 10 contributing Customers/Products in each bucket.	Understand the lowest performing products and decide on corrective actions if needed.
Revenue Pareto by Customer or Product	See the Pareto analysis for Customers/Products contribution to revenue, split into 10 buckets showing the number of Customers/Products in each bucket and cumulative contribution to the total revenue.	Understand which product line contributes the most/least toward the revenue and derive corrective actions.
Best & Worst Performers by Customer or Product	See the best/worst Customers/Products (5, 10, 25, 50, 100) for the selected KPI (revenue, revenue contribution %, margin, margin %, margin contribution %).	Understand the least performing product/product line by KPI and derive corrective actions.
Key Performance Indicators by Customer or Product	See the Customers/Products performance based on the selected KPI (revenue, revenue contribution %, margin, margin %, margin contribution %), split into three groups (low, medium, high) with the possibility to drill down for each group and see the top 10 (high and medium) or worst (low) 10 Customers/Products.	Analyze low performing customers/products and derive corrective actions.
Price Waterfall & Comparison Waterfall	See a standardized Price waterfall chart and waterfall comparison charts by time/Customers/Products.	Understand the customer/product profitability and take corrective action.

Revenue & Margin Causality	Analyze revenue/margin causality for two time periods with a breakdown into several categories (Lost Business, New Business, Price Effect, Volume Effect, other effects) and the possibility to display analysis in percentage.	Understand revenue/margin drives, and adjust strategy to improve performance in each bucket.
Revenue & Margin Causality	See revenue and margin distribution in the world map on the Continent/Country/State level.	Analyze the relationship between different regions, countries or states based on a KPI distribution.

Audience

Pricing Analysts

Entitlement

Data displayed in the dashboards can be restricted based on user groups of the logged in user.

Value Measurement (Sales Insights)

Different metric values are measured in conjunction with the Sales Insights Accelerator. This accelerator uses customer transactional history information (spanning one or more years) and these are the predominant values to measure.

- Measures
  - Dimensions
- KPI and Metrics
  - KPI
  - Metrics
- Sales Insights KPI

Measures

Measure	Description
Invoice Price	Reflects the actual price that the end-customer retailer pays to the manufacturer or distributor for a product.
Margin	Reflects the differences between the price of a good or service and the amount of money required to produce it.
Quantity	Quantity is the number of items of a specific product that are included on an invoice to a customer.
Cost	Cost is the total amount a business paid as a cost directly related to the sale of products. It may include products purchased for resale, raw materials, packaging, and direct labor.

Dimensions

Each of these different values will be measured across one or more dimensions:

- Product SKU
- Product segmentation hierarchy
- Customer ID
- Customer segmentation hierarchy
- Region
- Country
- Dates (Year, Quarter and Month)

KPI and Metrics

KPI stands for key performance indicator, a quantifiable measure of performance over time for a specific objective. KPIs provide targets for teams to shoot for, milestones to gauge progress, and insights that help people across the organization make better decisions. While key performance indicators and metrics are related, they are not the same.

KPI

KPIs are the key targets you should be tracking to make the biggest impact on your strategic business outcomes. These KPIs will support your strategy and help your teams focus on what is important. For example, a key performance indicator could be targeted at new consumers by month.

Metrics

Metrics, on the other hand, measure the success of everyday business activities that support your identified KPIs. While they may have an impact on your outcomes, they are not the most critical measurements. Examples could include monthly site visits or number of modules installed.

Sales Insights KPI

The main KPI for Sales Insights is **Gross Margin** and the measurement of it can be found in the following tools:

- Revenue and Margin Dashboard
- Margin Breakdown Dashboard
- Causality Dashboard
- Waterfall Dashboard
- Waterfall Comparison Dashboard

User Stories (Sales Insights)

Sales Insights Accelerator covers the following user stories:

Story Name	As a…	I want to…	So I can…	Acceptance Criteria	Dimensions & Measures	User Story ID	Category
Datamart Setup	IT/Data /Price Analyst	Set up a transactional Data Source, Product & Customer master and standard Datamart.	Perform analysis using Pricefx Analytics module.	1. Product Data Source available 2. Transactional Data Source available 3. Customer Data Source available (optional) 4. Standard pricing Datamart available	Pre-defined data format	SI.US. 001	Analytics, Data Manager
Revenue & Margin by Time	Pricing Analyst	Analyze revenue and margin % achieved during a given period, with the possibility to change the time dimension for aggregation.	Understand the revenue and margin trends for the business and decide on corrective actions.	1. Two measures time chart, with Revenue as a bar on left Y axis and Margin % as line on right Y axis 2. Possibility to filter data by Product or Customer attributes	Revenue, Margin, Transaction (Pricing) Data	SI.US. 002	Analytics, Revenue and Margin dashboard
Revenue & Margin by Customer or Product	Pricing Analyst	Analyze revenue and margin % achieved by a Customer/Product with visualization of the lowest 10%.	Understand the lowest performing products and decide on corrective actions.	Scatter plot with Revenue on X axis and margin % on Y axis. Reference percentile lines (percentile to be defined).	Revenue, Margin, Customer ID or Product ID	SI.US. 003	Analytics, Revenue and Margin dashboard
Revenue & Margin Contribution by Customer or Product	Pricing Analyst	Analyze contribution of Customers/Products to the total revenue and margin split into 10 buckets (from 10% to 100%), with the option to drill down to see the top 10 contributing Customers/Products in each bucket.	Understand the lowest performing products and decide on corrective actions if needed.	Charts display Revenue and Margin split into 10 buckets to visualize the number of products/customers needed to cover each bucket (cumulative contribution). Each data point displays the number of product/customer in the bucket, the total revenue/margin of the product/customer in the bucket and the revenue/margin representing the bucket.	Revenue, Margin, Product ID	SI.US. 004	Analytics, Revenue and Margin dashboard

Revenue Pareto by Customer or Product	Pricing Analyst	See the Pareto analysis for Customers/Products contribution to revenue, split into 10 buckets showing the number of Customers/Products in each bucket and cumulative contribution to the total revenue.	Understand which product line contributes the most/least toward the revenue and derive corrective actions.	Charts display Revenue and Margin % split into some bins to visualize the number of products/customers needed to cover each bin (cumulative contribution).	Revenue, Margin, Product ID	SI.US.005	Analytics, Revenue and Margin dashboard
Best & Worst Performers by Customer or Product	Pricing Analyst	See the best/worst Customers/Products (5, 10, 25, 50, 100) for the selected KPI (revenue, revenue contribution %, margin, margin %, margin contribution %).	Understand the least performing product/product line by KPI and derive corrective actions.	Table chart shows best/worst products using the (Revenue, Revenue Contribution %, Margin, Margin % and Margin Contribution %)	Revenue, Margin, Product ID	SI.US.006	Analytics, Outliers dashboard
Key Performance Indicators by Customer or Product	Pricing Analyst	See the Customers/Products performance based on the selected KPI (revenue, revenue contribution %, margin, margin %, margin contribution %), split into three groups (low, medium, high) with the possibility to drill down for each group and see the top 10 (high and medium) or worst (low) 10 Customers/Products.	Analyze low performing customers/products and derive corrective actions.	Table charts will show: performance by customer; and performance by product. Pie charts will display a breakdown of products into high, medium and low performers based on the KPI selected.	Revenue, Margin, Product ID	SI.US.007	Analytics, Outliers dashboard
Price Waterfall & Comparison Waterfall	Pricing Analyst	See a standardized price waterfall chart and waterfall comparison charts by time/Customers/Products.	Understand the customer/product profitability and take corrective action.	Shows the waterfall analysis with grouped adjustments.		SI.US.008	Analytics, Waterfall
Revenue & Margin Causality	Pricing Analyst	Analyze revenue/margin causality for two time periods with a breakdown into several categories (Lost Business, New Business, Price Effect, Volume Effect, other effects) and the possibility to display analysis in percentage.	Understand revenue/margin drives, and adjust strategy to improve performance in each bucket.	Revenue Breakdown waterfall chart: • Show total revenue dollars by selecting Quarter over Quarter or Month over month as the outer bars of the chart • Show breakdown of revenue by grouping the data into: ◦ "Lost Business" vs. "New Business"	Revenue, Margin, Customer ID, Product ID, Quantity	SI.US.009	Analytics, Revenue & Margin Causality

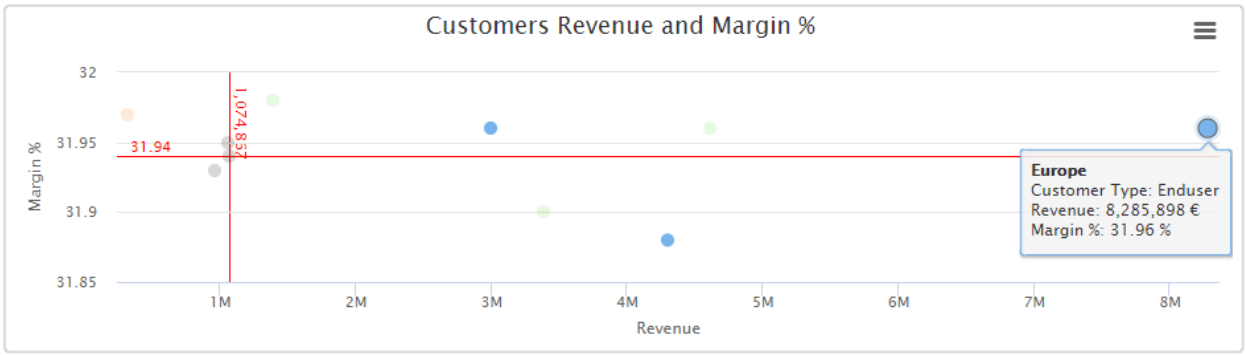
		See: Pricefx standard Revenue Causality Pricefx standard Margin Causality		◦ Change to revenue due to "Price Effect" ◦ Change to revenue due to "Volume Effect" ◦ Change to revenue due to "Portfolio Mix Effect" ◦ Change to revenue due to "Other Effect" Margin Breakdown waterfall chart: • Show total margin dollars by selecting Quarter over Quarter or Month over month as the outer bars of the chart • Show breakdown of margin by grouping the data into: ◦ Change to margin due to "Volume" ◦ Change to margin due to "Price" ◦ Change to margin due to "Mix" ◦ Change to margin due to "New products" ◦ Change to margin due to "Lost products" ◦ Change to margin due to "Cost" ◦ Change to margin due to "Intersection" • Possibility to filter the waterfall chart by product or product line			
Revenue & Margin Causality	Pricing Analyst	See revenue and margin distribution in the world map on the Continent/Country/State level.	Analyze the relationship between different regions, countries or states based on a KPI distribution.	The selected KPI (revenue or margin) is displayed in the world map per geographical unit defined by user configuration (Region, Country), each geohraphical unit has an appropriate color shade depending on the KPI. The values are aggregated on the customer, product, date from/to level with the configurable currency conversion allowed. Beside the selected KPI, information on other KPIs for each region is displayed (by hint) as well.	Revenue, Margin, Customer ID, Product ID, Quantity, Region, Country	SI.US.010	Analytics, Regional Revenue and Margin dashboard

Business User Reference (Sales Insights)

The following sections describe each dashboard – how to set up its data and filters and how to analyze the results. Other details (fields calculation, data requirements and used Company Parameters) are also provided.

Revenue and Margin Dashboard

Revenue and Margin Dashboard helps you visualize and analyze the relationship between Revenue and Margin % from different perspectives of time, product and customer. You can customize the date range and set of products/customers for analysis.



Set Up Data and Filters

For this dashboard you can set the following inputs:

Input	Description
Product(s)	Allows to choose one of product attributes to be used for the analysis. Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Customer(s)	Allows to choose one of customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Date From/To	Filters data for the analysis according to the given time range. **Default Value:** • **Date From** is set to one year back. • **Date To** is set to today's date.
Time Period	Allows you to define data aggregation for the "Revenue and Margin % in Time" analysis. The available values are: Week, Month, Quarter (default), Year.
Product Aggregation	Allows to define a custom grouping dimension to reduce the granularity of the product data. The product dimensions available in this input are defined in Advanced Configuration. Fields must come from the Datamart used for the package.
Customer Aggregation	Allows to define a custom grouping dimension to reduce the granularity of the customer data. The customer dimensions available in this input are defined in Advanced Configuration. Fields must come from the Datamart used for the package. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfig`).
Band By for Products	Allows to define additional grouping of data points in the analysis by a different dimension related to the products.
Band By for Customer	Allows to define additional grouping of data points in the analysis by a different dimension related to the customers. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Column chart axis type	Allows to define type of Y axis used on the chart. The available values are: • Linear (default) • Logarithmic
Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from system the `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.

Revenue and Margin Dashboard

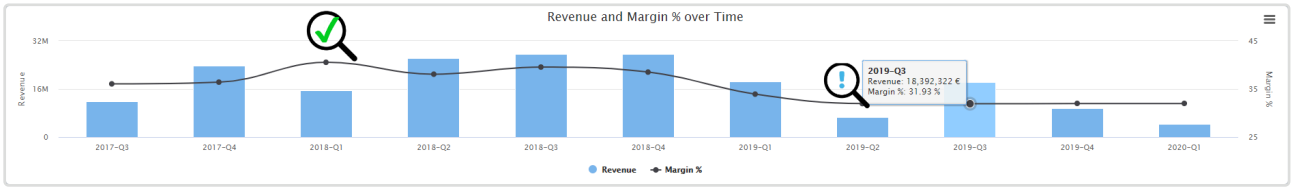
Analyze Results

The dashboard provides the following summaries.

Revenue and Margin Percentages in Time

Helps you analyze the relationship between Revenue and Margin % in the time aggregated per the defined time dimension.

- X axis displays the time period aggregation as defined by the Time Period input.
- Left hand side Y axis shows the Revenue scale.
- Right hand side Y axis shows the Margin % scale.

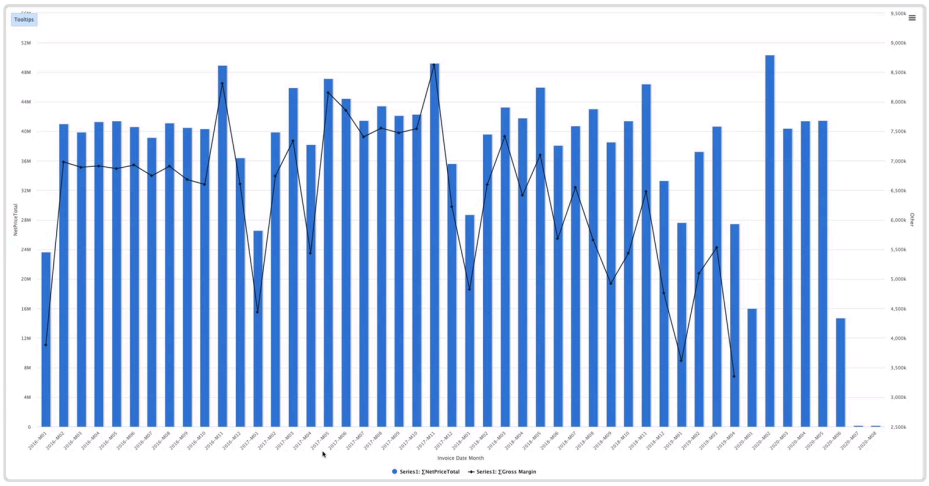


Revenue and Margin % in Time

What to Look out for

- Generally, if the revenue is low at a certain period, at least we want to keep the margin high.
- Pay attention to those periods where both margin and revenue are low and make sure it does not stay this way.
- This chart helps you discover whether there is any seasonal pattern in your data. You can use this as an input for price decisions (e.g. lower the price in less busy periods).

Example



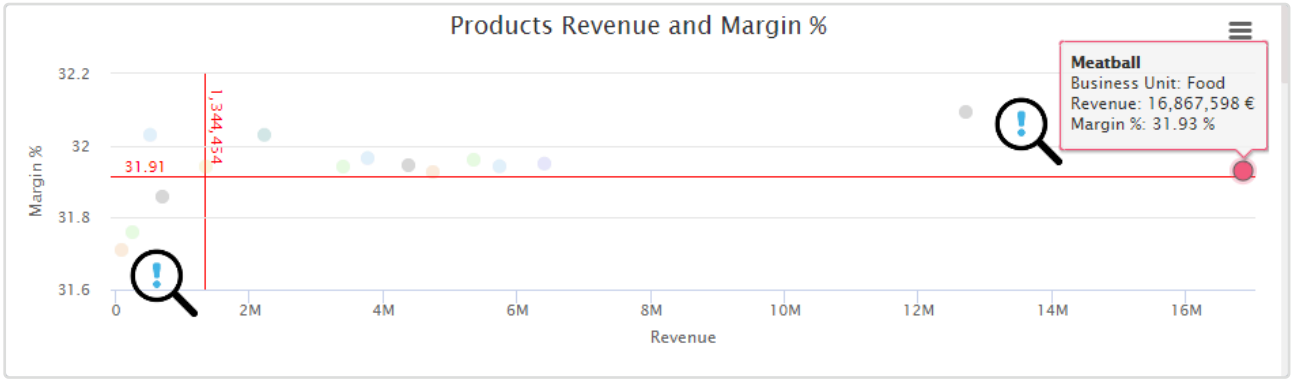
Revenue and Margin Percentages per Product

Helps you analyze the relationship between Revenue and Margin % on the product level using the selected aggregation and visualize the correlation per the chosen product attribute.

- X axis displays the sum of Revenue per chosen product aggregation.
- Y axis displays the sum of Margin % per chosen product aggregation.
- The first line is horizontal and at a defined percent value of the lowest margin (typically 10%), the second line is vertical and at a defined percent value of the lowest revenue. This divides the chart in four sections.

How Aggregation and Coloring Work

1. Aggregation manages what data points you can see. If you choose “Product Group”, you should see a point for every product group in the data.
2. Band By manages how to color the data. So colors will be assigned based on this input. If you choose “Product Id”, each product Id datapoint will have its own color.
3. If Band By has a smaller granularity than Aggregation, it will override Aggregation.
   Example: If you request to color by productId but aggregate by productGroup, aggregation will not happen, because then Band By would not know how to color it. The chart will look the same way as if you selected productId as aggregation.



Revenue and Margin % per Product

What to look out for

- **Bottom left section** – Shows products with low margin % & low revenue. For these products consider raising their price, so that they move up to the top (their margin increases) or work on increasing the volume of sold products (and thus move right towards a bigger revenue). The optimal move here is to go with the product to the top right sections (i.e. increase both margin and revenue).
- **"Risky business" in top right section** – This may mean that a customer buys large quantities for a high price. There is a risk of losing such a customer if they find out that others get the same product for a lower price. The optimal scenario is to have the dots grouped around some average price value.

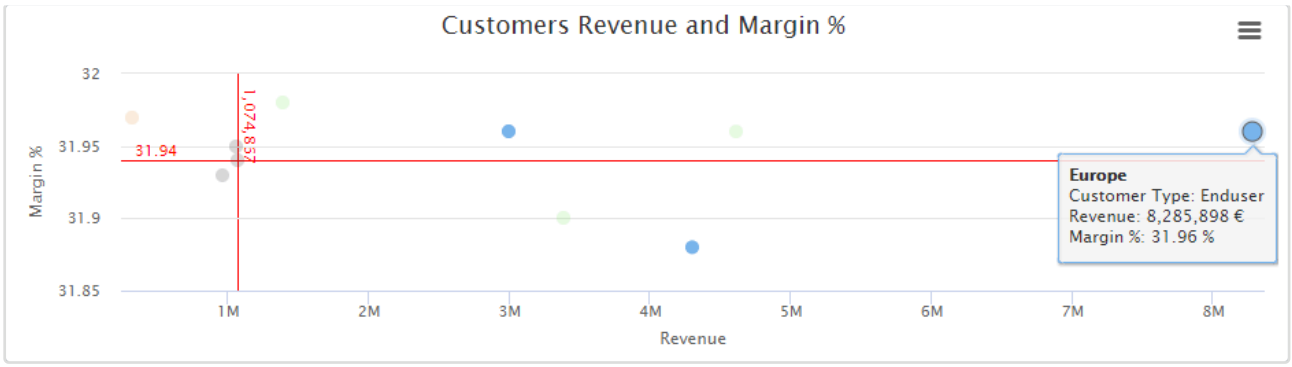
⚠ Due to performance reasons this chart is limited to display only top 50 products. These product values are used to calculate the plot lines.

Revenue and Margin Percentages per Customer

ℹ Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).

Helps you analyze the relationship between Revenue and Margin % on the customer level using the selected aggregation. The data points in the analysis can be colored by the customer dimensions set by 'Band By For Customer' which helps you visualize the relationship per the chosen customer attribute.

- X axis displays the sum of Revenue per chosen customer aggregation.
- Y axis displays the sum of Margin % per chosen customer aggregation.
- The first line is horizontal and at defined % of the lowest margin, the second line is vertical and at defined % of the lowest revenue. This divides the chart in four squares: the bottom left square shows low margin %, low revenue customers. It can be worthwhile to look into raising prices for these customers.



Revenue and Margin % per Customer

What to look out for

- The chart shown above illustrates that it may happen that large customers generating large revenue may not reach the optimal margin, yet it pays off to keep these customers.
- On the other hand, small customers get the products for higher prices and generate larger margin.

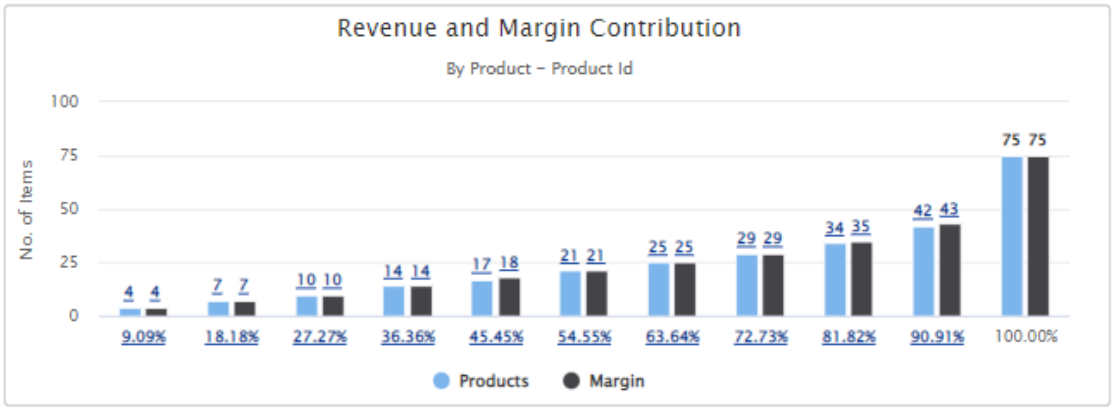
⚠ Due to performance reasons this chart is limited to display only top 50 customers. These product values are used to calculate the plot lines.

Revenue and Margin Contribution per Product/Customer

These two charts display Revenue and Margin split into defined buckets to visualize the number of product/customer aggregation levels needed to cover each bucket (cumulative contribution).

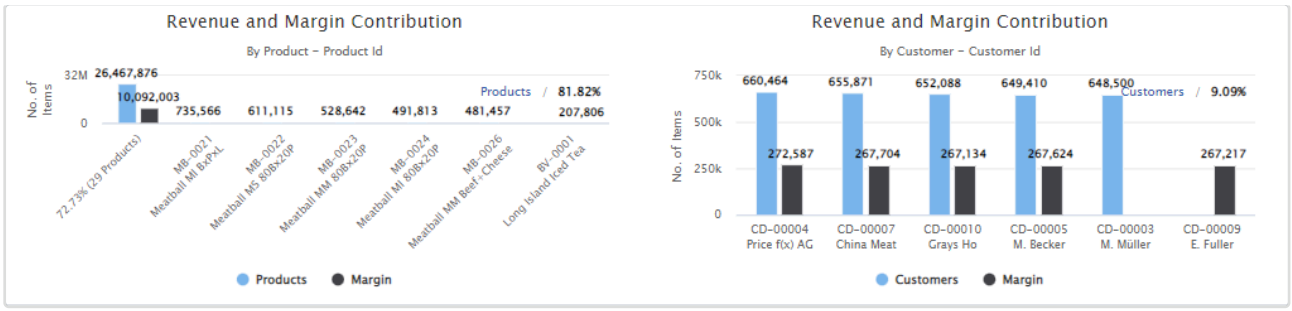
ℹ Customer Revenue and Margin Contribution are displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).

Each data point displays the number of items in the bucket, the total revenue/margin of the items in the bucket and the revenue/margin representing the bucket.



Revenue and Margin Contribution per Product

There is also a possibility to preview each of the bucket contents by clicking on the percentage labels. It displays which particular customers/products contribute to the bucket.



Revenue and Margin Contribution per Customer

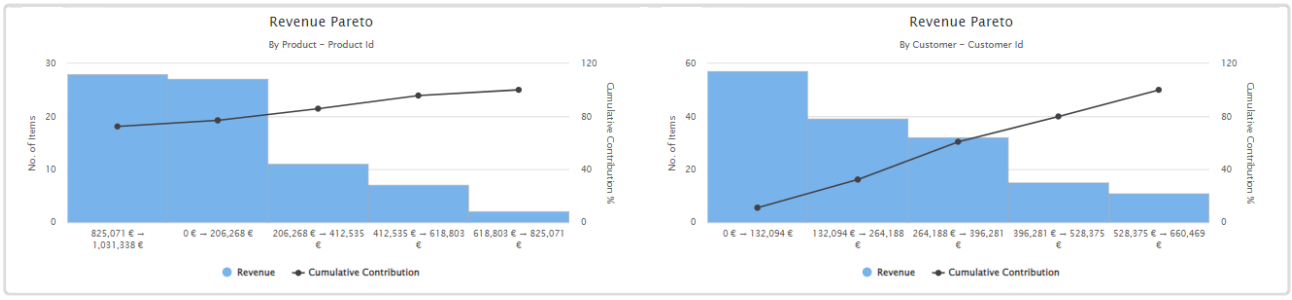
What to look out for

- It is good to have the buckets filled in evenly; i.e. not to rely on just one product/customer contributing most.

Revenue Pareto per Product/Customer

These two charts display Revenue and Margin % split into some bins to visualize the number of product/customer aggregation levels needed to cover each bin (cumulative contribution).

> Customer Revenue and Margin Pareto are displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).



Revenue Pareto per Product/Customer

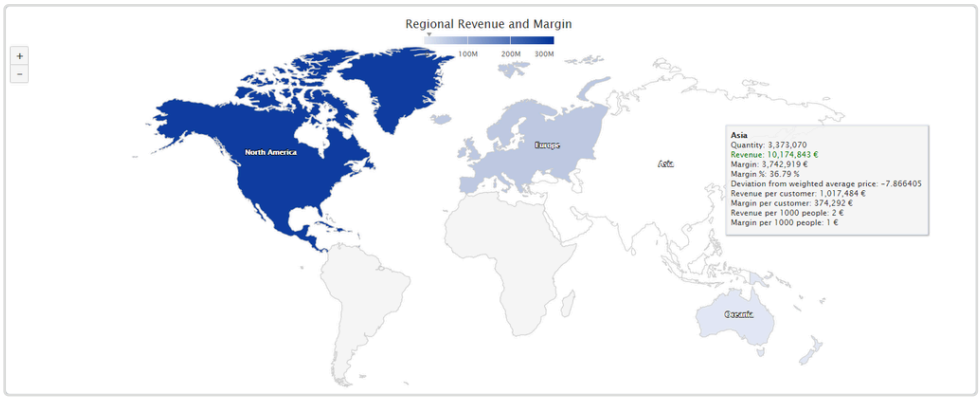
Field Calculations and Company Parameters

To learn about field calculations, used company parameters and data requirements, see Revenue and Margin Dashboard (Technical User Reference).

Regional Revenue and Margin Dashboard

The Regional Revenue and Margin Dashboard presents KPIs distribution on the world map. It helps you analyze relationships between different continents, countries or regions based on a KPI distribution. The dashboard provides four levels of a view based on the available Datamart data and configuration:

- World
- Continent
- Country
- Region



Set Up Data and Filters

For this dashboard you can set the following inputs:

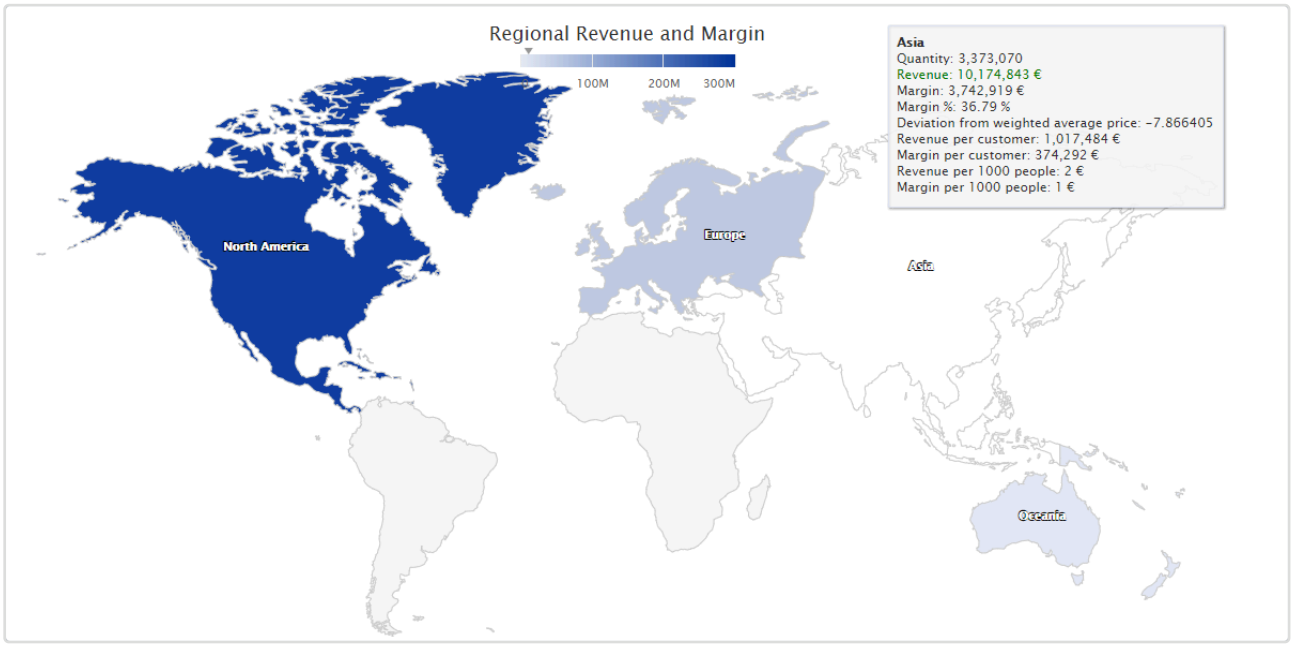
Input	Description
Product(s)	Allows you to choose one of the product attributes to be used for the analysis. Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Customer(s)	Allows you to choose one of the customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Date From/To	Filters data for the analysis according to the given time range. **Default Value:** • **Date From** is set to one year back. • **Date To** is set to today's date.
KPI	Allows you to choose from the following KPIs for the analysis: • Quantity • Revenue (selected by default) • Margin • Margin % • Deviation from Weighted Average Price (WAP) WAP = revenue / quantity - {total average price} while {total average price} = total revenue / total quantity • Revenue per Customer – Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). • Margin per Customer – Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). • Revenue per 1000 people (see the note on population) • Margin per 1000 people (see the note on population)
Region Configurator	Allows you to choose which hierarchy level to display on the map. • Depending on what is selected, the map behaves differently: ◦ If you select to display world → The map will show Level 1: World (continents of the world shown). ◦ If you choose Continent and do not choose Country. → The map will show Level 2: Continent (countries of this continent shown). ◦ If you choose Continent, Country and do not choose Region. → The map will show Level 3: Country (regions of this country shown). See the Supported Maps page for more details. ◦ If you choose Continent, Country, Region. → The map will show Level 4: Region (sectors of this region shown). There is no sector support for now. ◦ The world level is displayed by checking the **Display World map** checkbox. ◦ If the world level is unchecked, the selection boxes come up and allow users to select other defined hierarchy levels. 
Currency	Allows you to choose a currency to be used in the dashboard. The exchange rate for the selected currency is fetched from the system `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set a generic transaction data filter. For example: display only data from Europe, or Asia.

Analyze Results

The following map models are available:

World Map

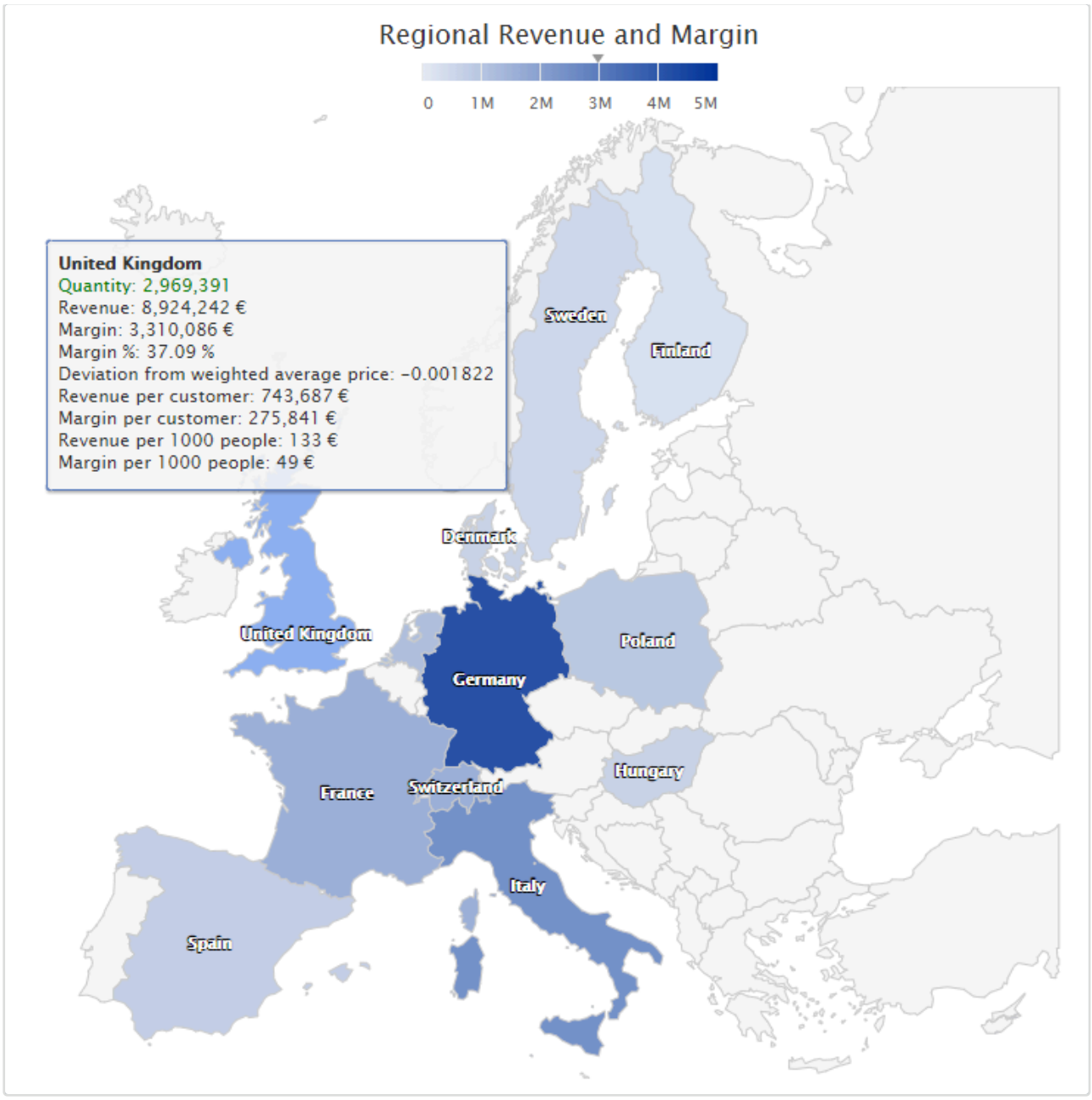
Helps you analyze the selected KPI (in this case Revenue) distribution between different continents. Beside the selected KPI, it also shows information on other KPIs for each continent.



World Map

Continent Map

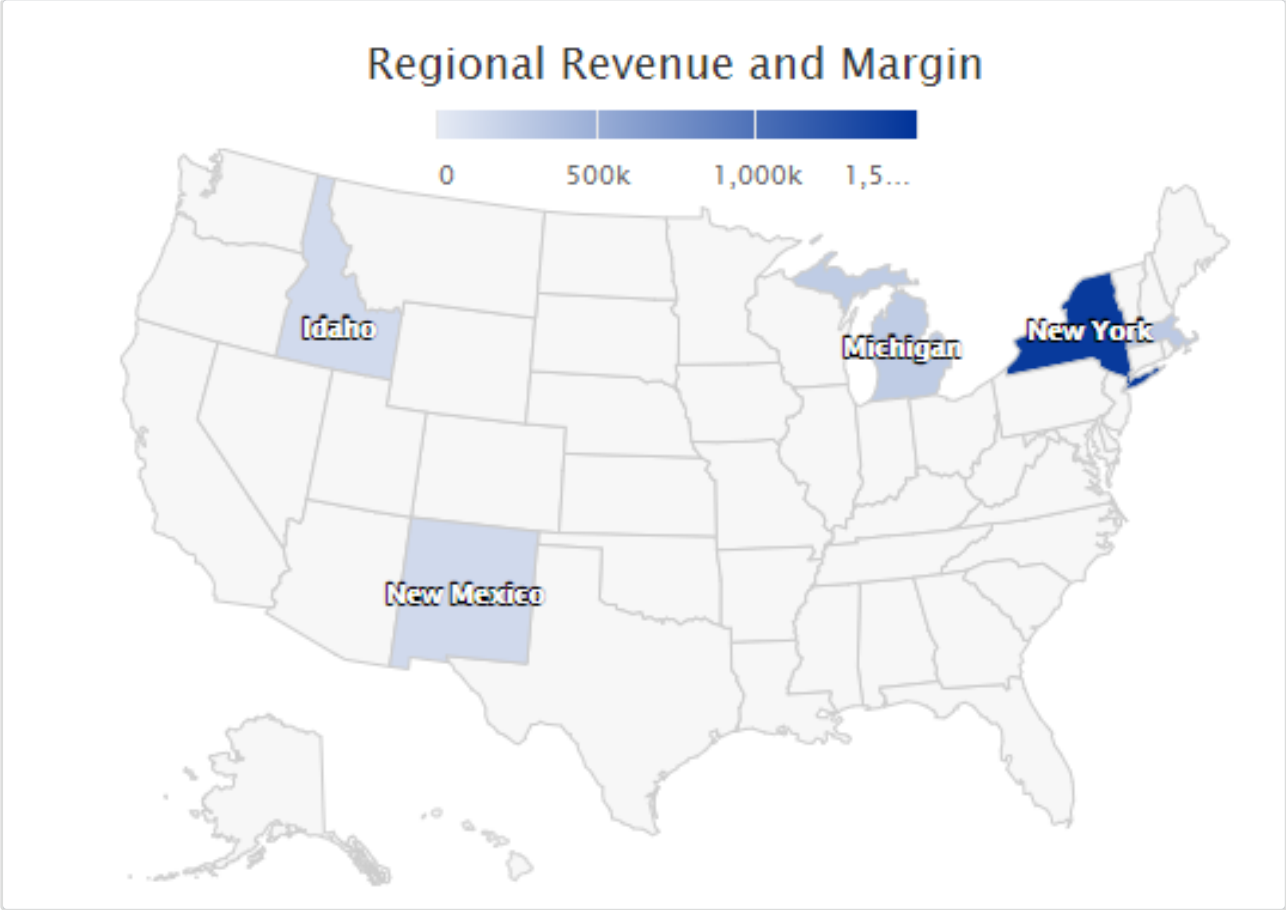
Helps you analyze the revenue distribution between different countries of a selected continent. Beside the selected KPI, it also shows information on other KPIs for each country.



Continent Map

Country Map

Helps you analyze the revenue distribution between different regions of a selected country. Beside the selected KPI, it also shows information on other KPIs for each region.



Country Map

Note on Population

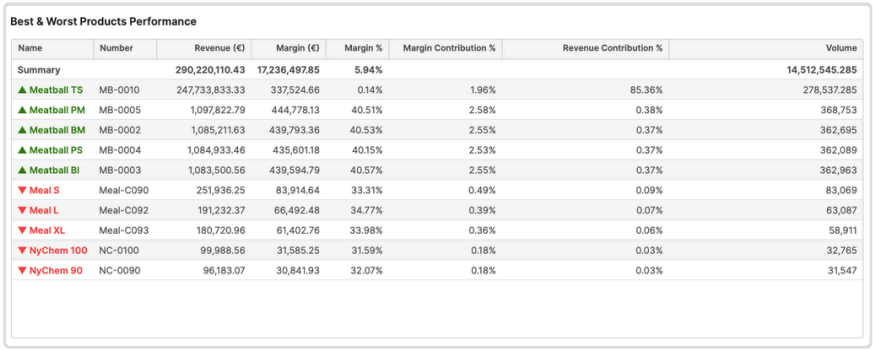
To calculate Revenue or Margin per 1000 people, we need to work with the continent/country/region/sector population, so we have a Company Parameter table to store it. If you need to update the population, you can update it in the Company Parameter table named `SIP_Population`.

Field Definitions and Supported Map Types

To learn about field definitions, supported map types, used company parameters, and list of used advanced configuration fields, see Regional Revenue and Margin Dashboard (Technical User Reference).

Outliers Dashboard

Outliers Dashboard helps you analyse the best and worst performing products and customers based on different KPIs and a selected filter.



Best & Worst Products Performance

Name	Number	Revenue (€)	Margin (€)	Margin %	Margin Contribution %	Revenue Contribution %	Volume
Summary		290,220,110.43	17,236,497.85	5.94%			14,512,545.285
▲ Meatball TS	MB-0010	247,733,833.33	337,524.66	0.14%	1.96%	85.36%	278,537.285
▲ Meatball PM	MB-0005	1,097,822.79	444,778.13	40.51%	2.58%	0.38%	368,753
▲ Meatball BM	MB-0002	1,085,211.63	439,793.36	40.53%	2.55%	0.37%	362,695
▲ Meatball PS	MB-0004	1,084,933.46	435,601.18	40.15%	2.53%	0.37%	362,089
▲ Meatball BI	MB-0003	1,083,500.56	439,594.79	40.57%	2.55%	0.37%	362,963
▼ Meal S	Meal-C090	251,936.25	83,914.64	33.31%	0.49%	0.09%	83,069
▼ Meal L	Meal-C092	191,232.37	66,492.48	34.77%	0.39%	0.07%	63,087
▼ Meal XL	Meal-C093	180,720.96	61,402.76	33.98%	0.36%	0.06%	58,911
▼ NyChem 100	NC-0100	99,988.56	31,585.25	31.59%	0.18%	0.03%	32,765
▼ NyChem 90	NC-0090	96,183.07	30,841.93	32.07%	0.18%	0.03%	31,547

Outliers Dashboard: Best & Worst Products Performace

Set Up Data and Filters

For this dashboard you can set the following inputs:

Input	Description
Product(s)	Allows you to choose one of the product attributes to be used for the analysis. ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering. ⚠ This input is not taken into account for the summary data.
Customer(s)	Allows you to choose one of the customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering. ⚠ This input is not taken into account for the summary data.
Date From/To	Filters data for the analysis according to the given time range. **Default Value:** • **Date From** is set to one year back. • **Date To** is set to today's date.
Product Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the product data. The product dimensions available in this input are defined in the Advanced Configuration. The fields must come from the Product Master table.
Customer Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the customer data. The customer dimensions available in this input are defined in the Advanced Configuration. The fields must come from the Customer Master table. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Calculation Model	Allows you to select the calculation model for Outliers. Currently available models are: • (Max - Min) Split (default) • Split Equally • Contribution
KPI	Stands for Key Performance Indicator, a measure which is used to determine the Best/Worst performers. You can choose from the following values (may vary depending on the model selected): • Revenue • Revenue Contribution % • Margin • Margin % • Margin Contribution %
Top Product(s)/Customer(s)	Allows you to choose from a predefined list of values how many products/customers should be displayed in Best & Worst performance tables. In case there is not enough products to display, the results are trimmed and "Best" is favored (in case of only 5 products the division will be 3/2). **Default Value:** 5

Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from the system `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.

Analyze Results

The dashboard provides the following summaries:

Best & Worst Products/Customers Performance

> Customer Performance Table is displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).

There are separate tables for products and customers showing different KPIs of the best and worst performing products or customers based on the selected filters.

Best & Worst Products Performance

Name	Number	Revenue (€)	Margin (€)	Margin %	Margin Contribution %	Revenue Contribution %	Volume
Summary		**290,220,110.43**	**17,236,497.85**	**5.94%**			**14,512,545.285**
▲ Meatball TS	MB-0010	247,733,833.33	337,524.66	0.14%	1.96%	85.36%	278,537.285
▲ Meatball PM	MB-0005	1,097,822.79	444,778.13	40.51%	2.58%	0.38%	368,753
▲ Meatball BM	MB-0002	1,085,211.63	439,793.36	40.53%	2.55%	0.37%	362,695
▲ Meatball PS	MB-0004	1,084,933.46	435,601.18	40.15%	2.53%	0.37%	362,089
▲ Meatball BI	MB-0003	1,083,500.56	439,594.79	40.57%	2.55%	0.37%	362,963
▼ Meal S	Meal-C090	251,936.25	83,914.64	33.31%	0.49%	0.09%	83,069
▼ Meal L	Meal-C092	191,232.37	66,492.48	34.77%	0.39%	0.07%	63,087
▼ Meal XL	Meal-C093	180,720.96	61,402.76	33.98%	0.36%	0.06%	58,911
▼ NyChem 100	NC-0100	99,988.56	31,585.25	31.59%	0.18%	0.03%	32,765
▼ NyChem 90	NC-0090	96,183.07	30,841.93	32.07%	0.18%	0.03%	31,547

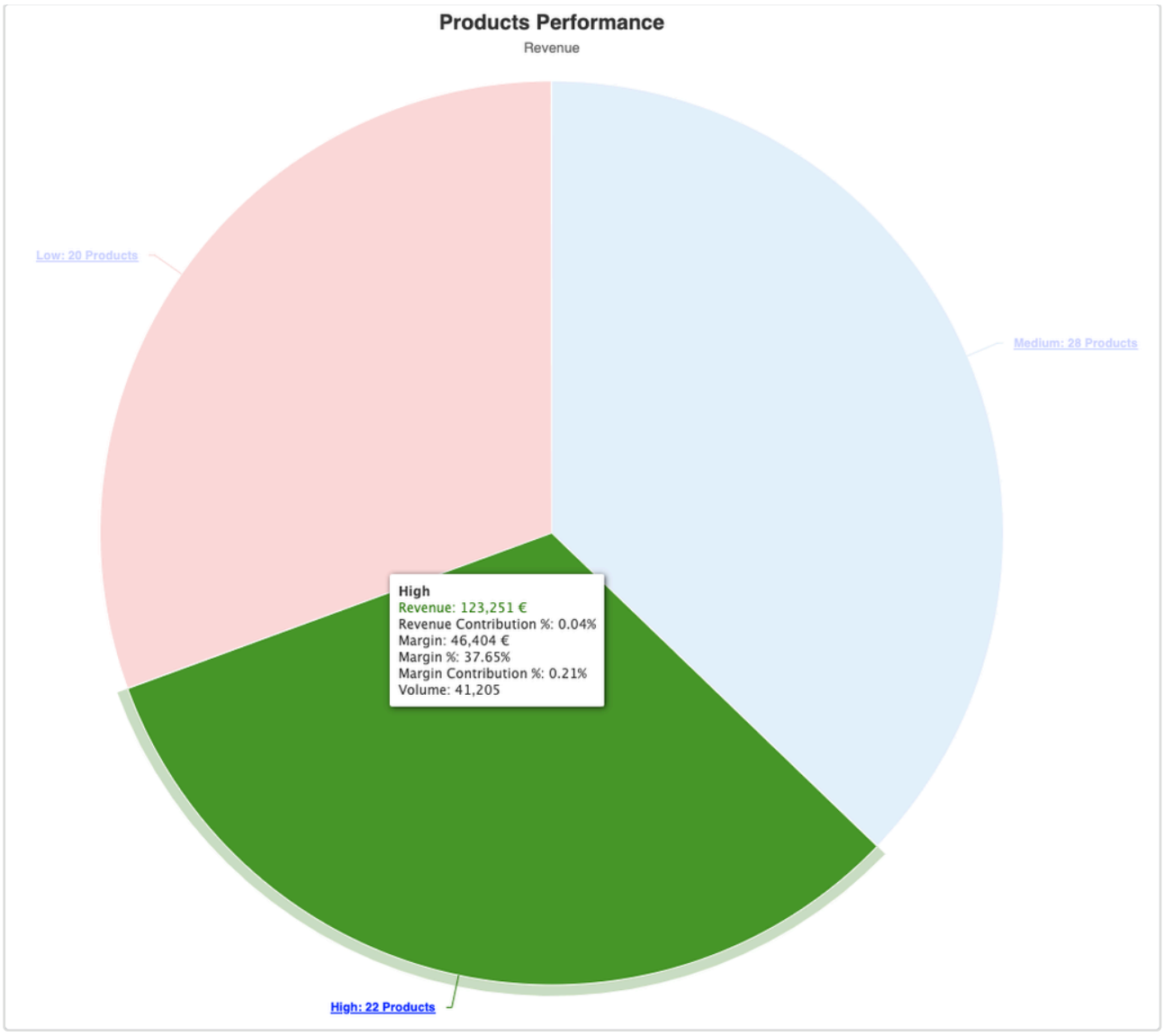
Best & Worst Customers Performance

Name	Number	Revenue (€)	Margin (€)	Margin %	Margin Contribution %	Revenue Contribution %
Summary		**290,220,110.43**	**17,236,497.85**	**5.94%**		
▲ Soupo AG	CD-00006	248,056,316.31	497,257.72	0.20%	2.88%	85.47%
▲ E. Fuller	CD-00009	1,160,305.94	499,049.42	43.01%	2.90%	0.40%
▲ M. Becker	CD-00005	1,154,062.09	493,313.58	42.75%	2.86%	0.40%
▲ China Meat	CD-00007	1,153,945.15	493,674.25	42.78%	2.86%	0.40%
▲ Spagetti M	CD-00002	1,152,996.27	494,742.81	42.91%	2.87%	0.40%
▼ South Chickem	CD-00132	63,170.60	26,634.22	42.16%	0.15%	0.02%
▼ Very Good Meat	CD-00139	62,491.96	26,358.50	42.18%	0.15%	0.02%
▼ Martin Johann	CD-00131	62,376.09	26,033.86	41.74%	0.15%	0.02%
▼ Stomach	CD-00129	60,724.85	25,364.24	41.77%	0.15%	0.02%
▼ Zumtoschwein KG	CD-00147	47,074.08	18,584.54	39.48%	0.11%	0.02%

Products/Customers Performance Chart

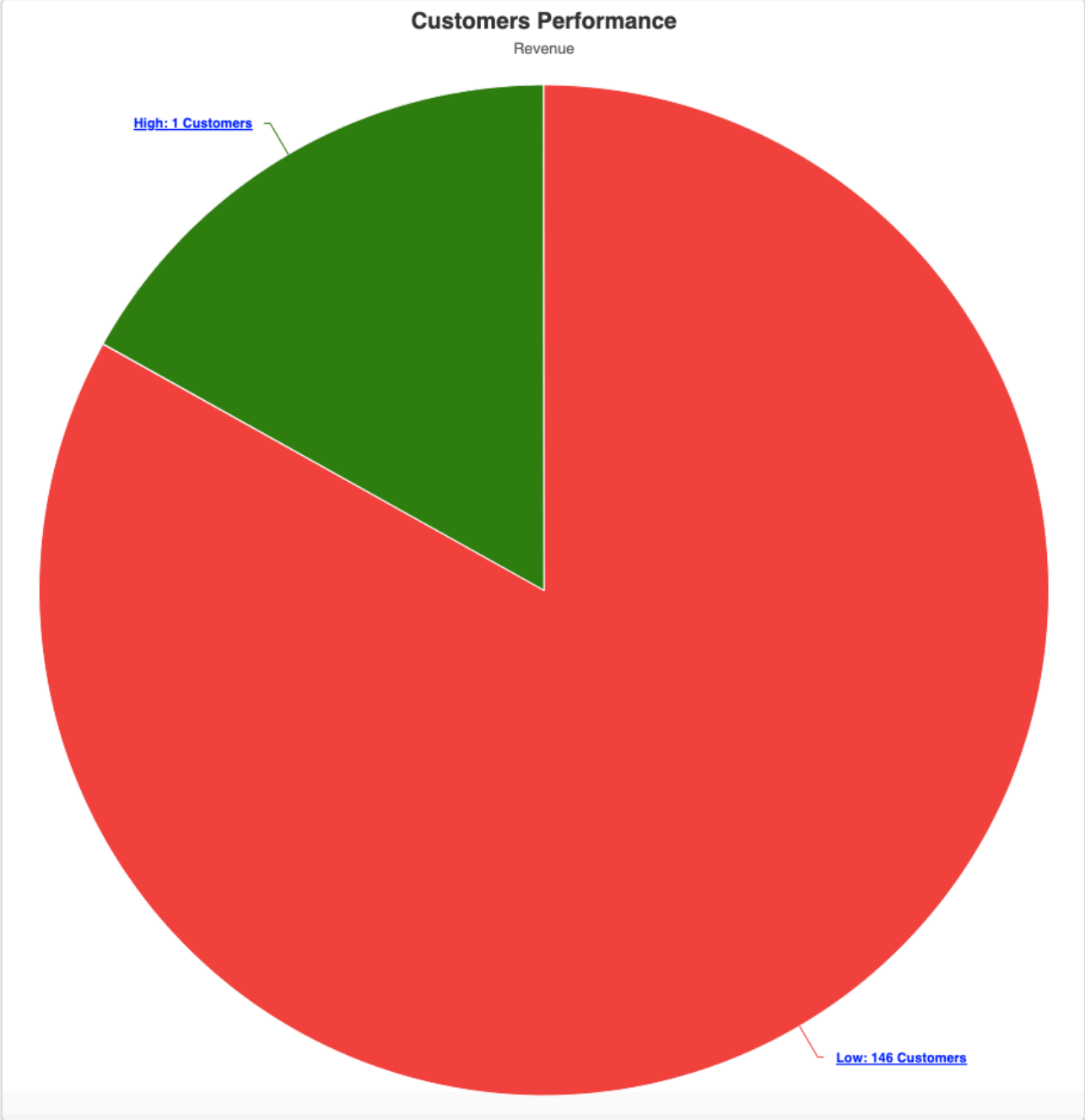
> Customer Chart is displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).

The pie chart displays the count of products/customers in each group (High, Medium, Low, Negative), the selected KPI value is highlighted.

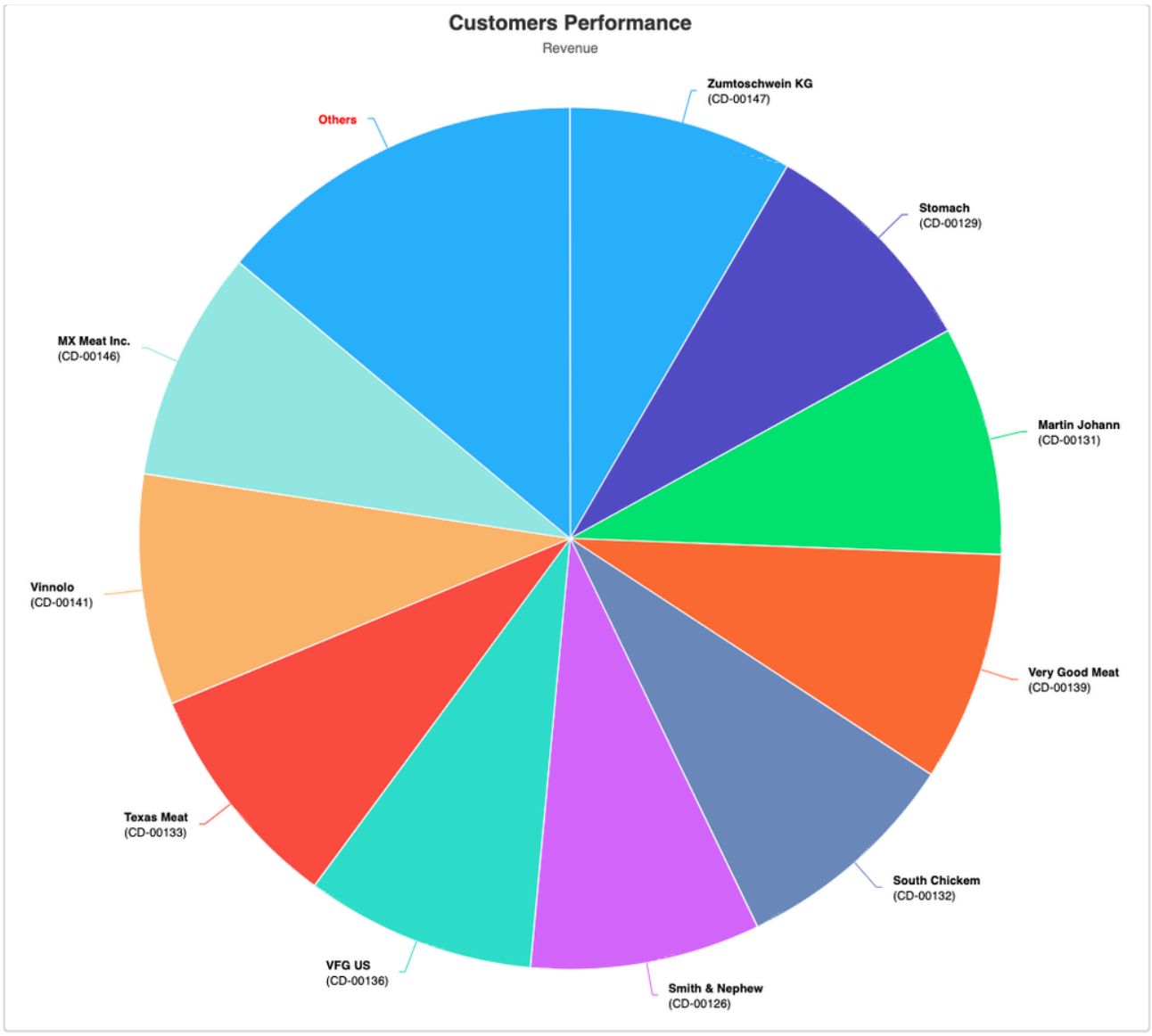


What to look out for:

- If you ever get here products with a negative margin, these are definitely candidates for review. Often, these can be gifts, warranties or other justifiable items but in other cases it may highlight a potential issue.
- Customers with negative performance are even more questionable (unless they represent internal units or similar cases).
- Also, this chart allows you to review your strategy when it comes to a target customer size – whether to focus on large, medium or small customer; especially if you can support it with data on the total cost of ownership of each customer.



There is also an option to drill down into each category (by clicking the category in the chart or legend) and display additional details. For the High and Medium categories the detailed chart will display 10 best performing items and for Low and Negative 10 worst. The rest will be grouped into the "Others" group.

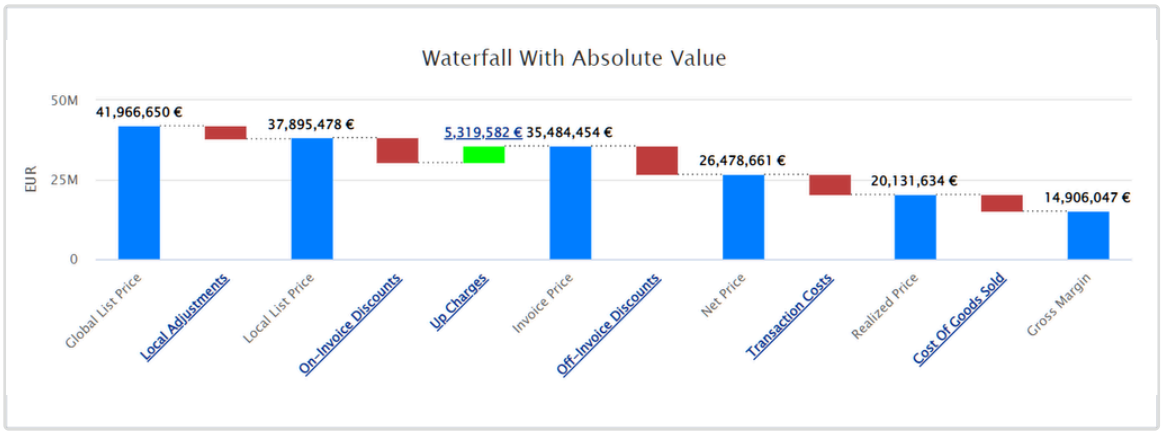

Customers Performance
Revenue
Zumtoschwein KG
(CD-00147)
Stomach
(CD-00129)
Martin Johann
(CD-00131)
Very Good Meat
(CD-00139)
South Chickem
(CD-00132)
Smith & Nephew
(CD-00126)
VFG US
(CD-00136)
Texas Meat
(CD-00133)
Vinnolo
(CD-00141)
MX Meat Inc.
(CD-00146)
Others

Calculation Models and Company Parameters

To learn about calculation models, used company parameters, and a list of used advanced configuration fields, see Outliers Dashboard (Technical User Reference).

Waterfall Dashboard

Waterfall Dashboard presents the standardized price waterfall analysis. The chart helps you understand how an initial value is affected by a series of intermediate positive or negative values. The columns are color-coded for distinguishing between positive and negative values.



Waterfall With Absolute Value

Set Up Data and Filters

For this dashboard you can set the following inputs:

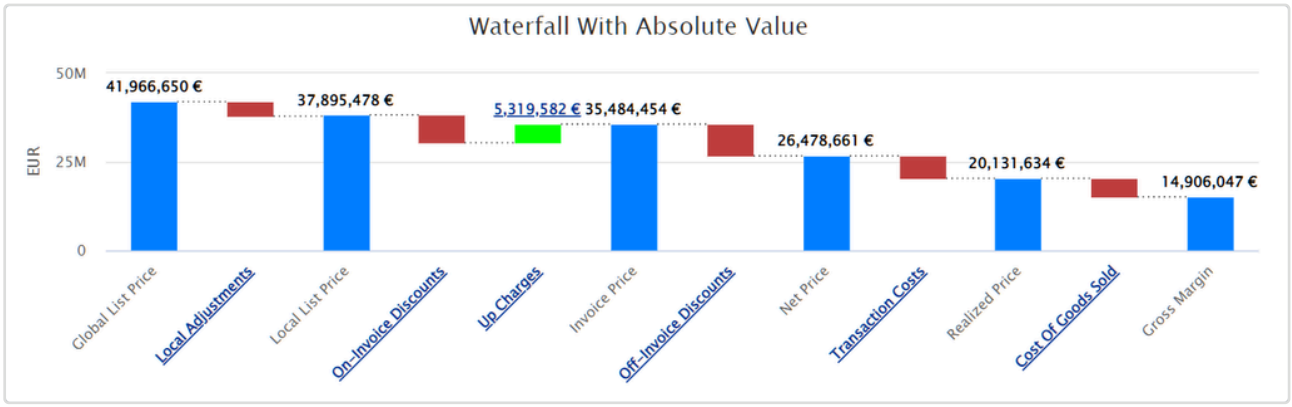
Input	Description
Product(s)	Allows you to choose one of product attributes to be used for the analysis. Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Customer(s)	Allows you to choose one of customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Date From/To	Filters data for the analysis according to the given time range. **Default Value:** • **Date From** is set to one year back. • **Date To** is set to today's date.
Waterfall Model	Allows you to choose the display model used in the waterfall. Currently there are 4 models available: • **Absolute** (selected by default) – Displays raw data with a thousands separator and currency symbol. Includes a drill-down defined in the Advanced Configuration `waterfall-configuration` . • **Absolute Detail** – Displays the same data as Absolute but without the drill-down functionality. • **By Absolute Unit** – Displays data by unit value. Includes a drill-down defined in the Advanced Configuration `waterfall-configuration` . • **Percentage** – Displays data converted to percentages. The percentage base is defined by the user in the Advanced Configuration `waterfall-configuration` .
Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from system the `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.

Analyze Results

Visibility of the waterfall elements depends on availability of data in the transactional data and Company Parameter tables setup. The dashboard provides the following models:

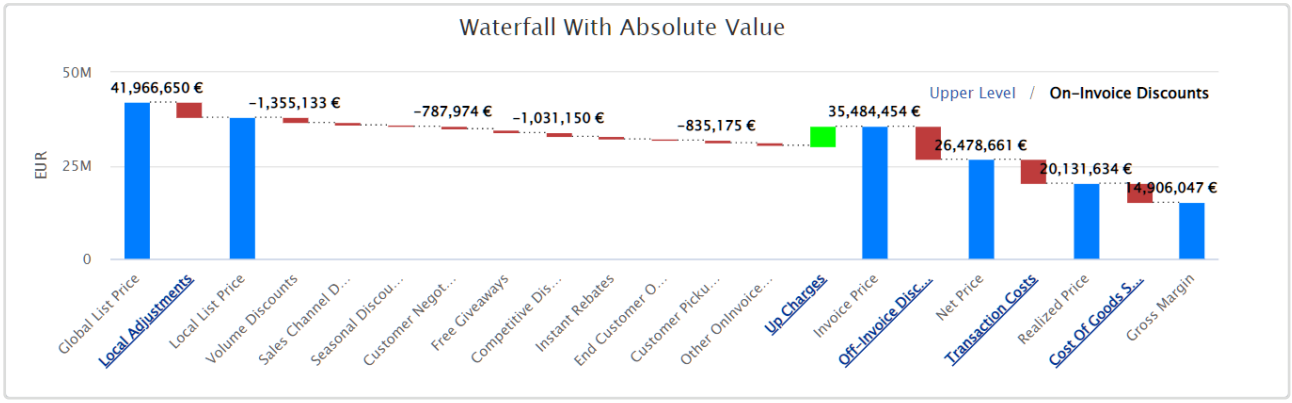
Absolute

Default View



Default View

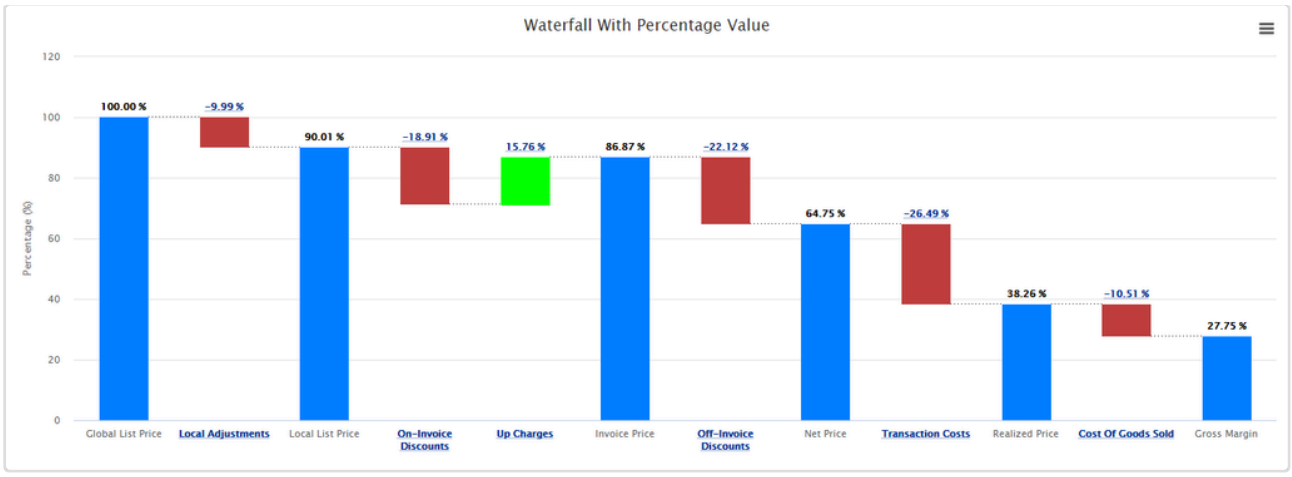
Drill-down for On-Invoice Discounts



Drill-down for On-Invoice Discounts

Percentage

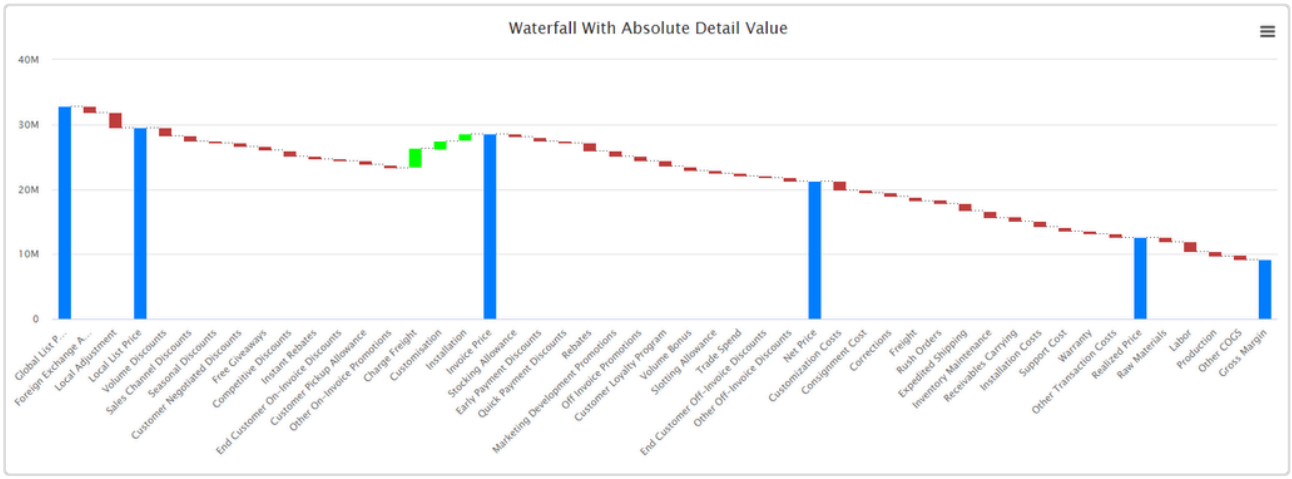
Each element is detailed as a percentage value of a reference field that has been defined during deployment, usually the List Price.



Percentage

Absolute Detail

All elements of the waterfall are displayed at once and values are in money term.

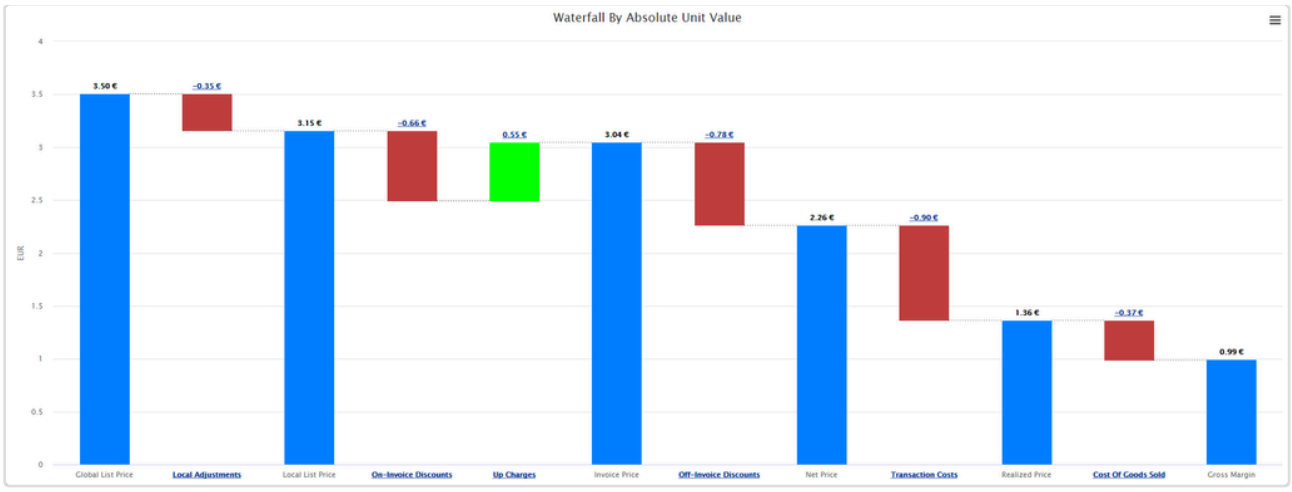


Absolute Detail

By Absolute Unit

All elements of the waterfall are displayed as per unit, like Gross Margin per unit.

This specially makes sense to review the waterfall at a product level to check impact of each part per sold product.



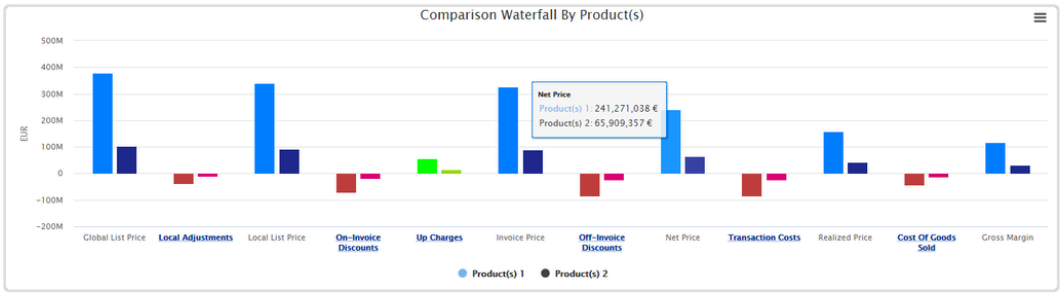
Absolute Unit

Field Definitions and Calculations

To learn about field definitions, field calculations, and a list of used advanced configuration fields, see Waterfall Dashboard (Technical User Reference).

Waterfall Comparison Dashboard

The Waterfall Comparison dashboard allows you to compare waterfalls of different time periods, products, and customers. The dashboard is built on top of a standardized Waterfall Dashboard and follows the same definition.



Set Up Data and Filters

When setting up data for Waterfall Comparison Dashboard, there are some common user inputs and some which are specific for each type of the comparison.

Specific User Inputs

The user inputs are slightly different for each type of the comparison:

- per Date
- Product
- Customer

Comparison Waterfall per Date

Input	Description
Comparison Type	Date
Product(s)	Allows you to choose one of the product attributes to be used for the analysis.
Customer(s)	Allows you to choose one of the customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Date From/To (Period 1)	Defines a date range for data used in the analysis – the first range. **Default Value:** • **Date From (1)** is set to the first day of January one year back. • **Date To (1)** is set to the last day of December one year back.
Date From/To (Period 2)	Defines a date range for data used in the analysis – the second range for comparison. **Default Value:** • **Date From (2)** is set to the first day of January two years back. • **Date To (2)** is set to the last day of December two years back.

Comparison Waterfall per Product

Input	Description
Comparison Type	Product
Product(s) 1	Allows you to choose one of the product attributes to be used for the analysis.
Product(s) 2	Allows you to choose one of the product attributes to be used for the analysis for comparison.
Customer(s)	Allows you to choose one of the customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Date From/To	Filters data for the analysis according to the given time range. **Default Value:** • **Date From** is set to the first day of January one year back. • **Date To** is set to the last day of December one year back.

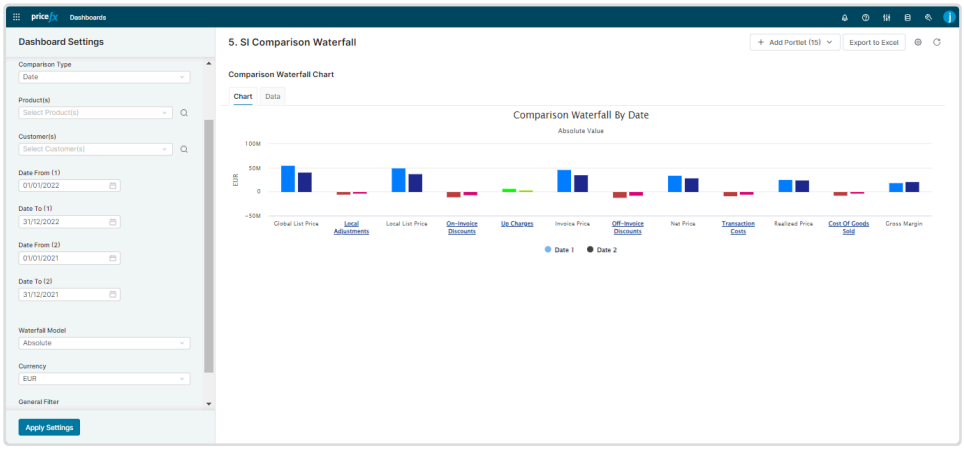
Comparison Waterfall per Customer

Input	Description
Comparison Type	Customer. Available for selection only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Product(s)	Allows you to choose one of the product attributes to be used for the analysis.
Customer(s) 1	Allows you to choose one of the customer attributes to be used for the analysis.
Customer(s) 2	Allows you to choose one of the customer attributes to be used for the analysis for comparison.
Date From/To	Filters data for the analysis according to the given time range. **Default Value:** • **Date From** is set to the first day of January one year back. • **Date To** is set to the last day of December one year back.

Common User Inputs

There are also common inputs that do not change based on the selected Comparison Type:

Input	Description
Waterfall Model	Allows you to choose the display model used in the waterfall.Currently there are 3 models available: • **Absolute** (selected by default) – Displays raw data with a thousands separator and currency symbol. Includes a drill-down defined in the Advanced Configuration `waterfall-configuration` . • **By Absolute Unit** – Displays data by unit value. Includes a drill-down defined in the Advanced Configuration `waterfall-configuration` . • **Percentage** – Displays data converted to percentages. The percentage base is defined by the user in the Advanced Configuration `waterfall-configuration` .
Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from system the `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set a generic transaction data filter. For example: display only data from Europe or Asia.

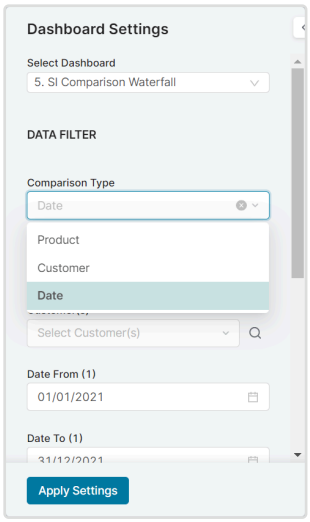


Example: Comparison by Date

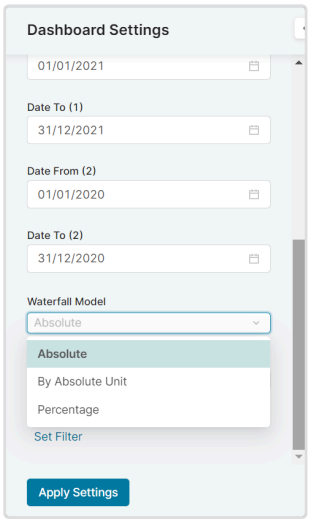
Analyze Results

For all three comparisons which are **Product**, **Customer**, and **Date**, there are the Waterfall Model types Absolute, Percentage, and By Absolute Unit. With enabled drill-down for adjustments.

Comparison by Date



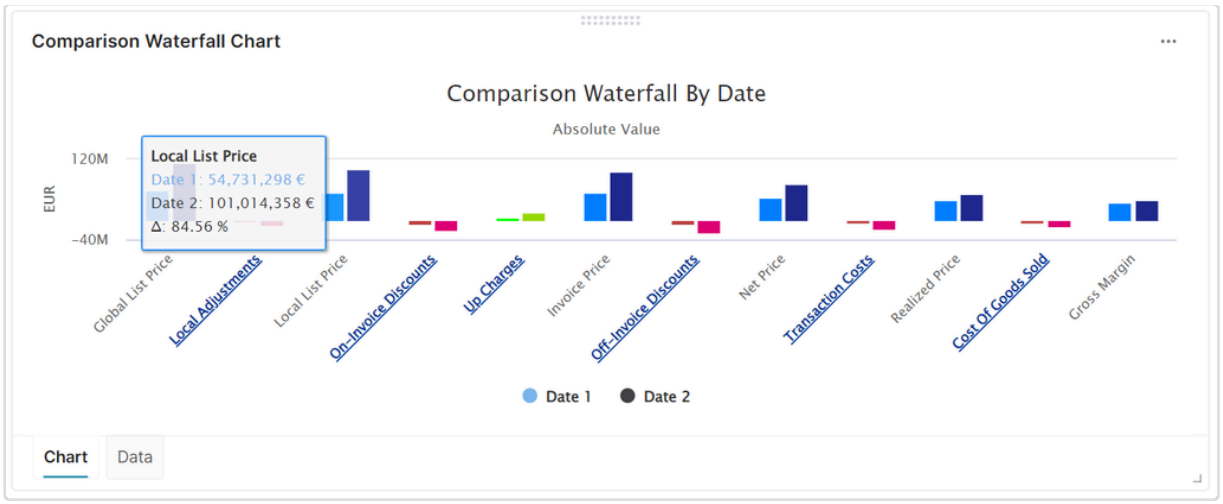
The purpose of the Waterfall Comparison by Date is to benchmark 2 different time periods, typically last year and current year.



Comparison Waterfall per Time Period

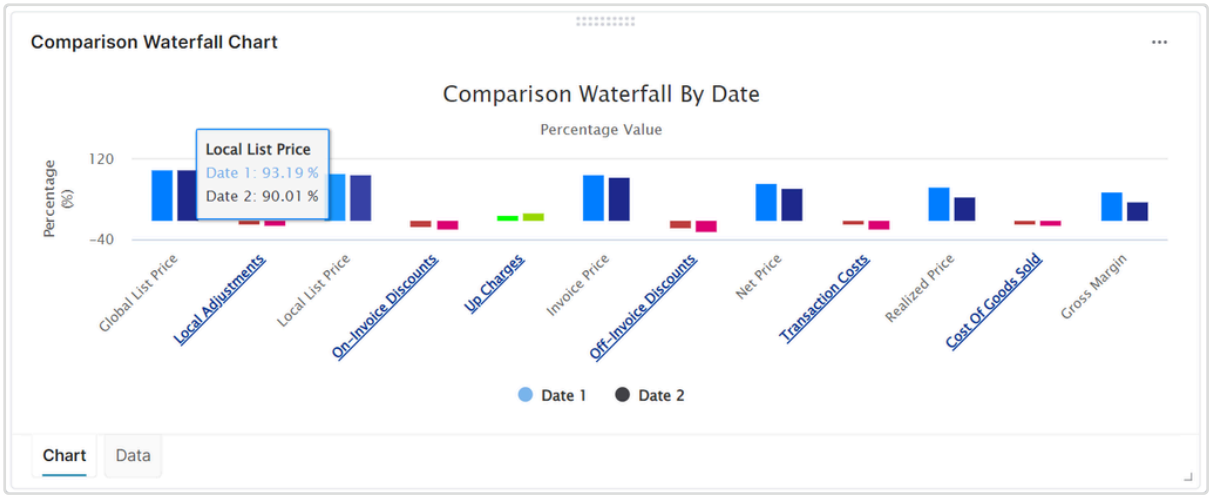
Waterfall Model is Absolute

Check total values for each waterfall elements and compare those vales in money amount.



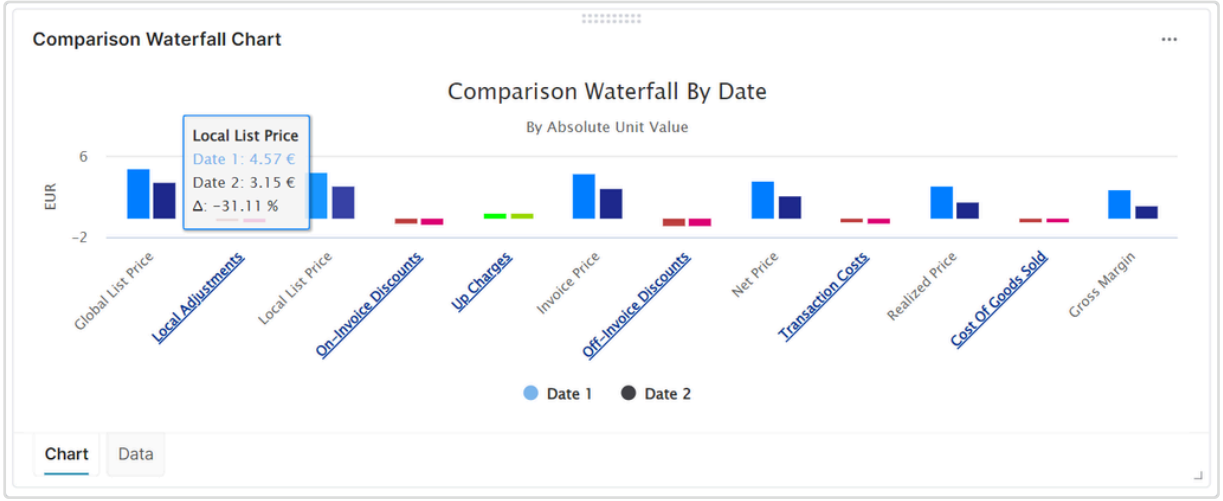
Waterfall Model is Percentage

Starting from one field defined in configuration as 100%, other values are normalized to get percentage.



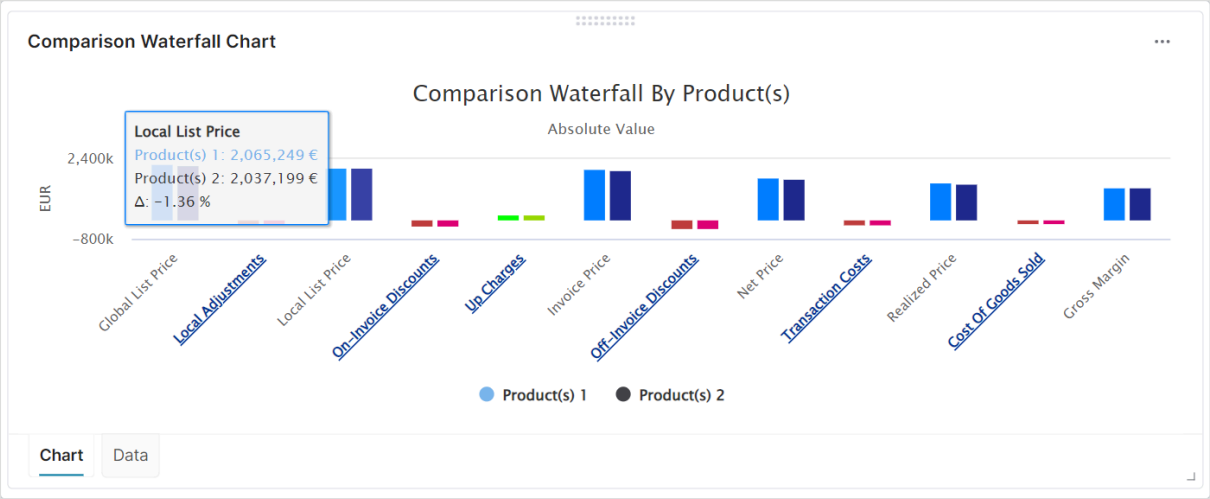
Waterfall Model is By Absolute Unit

Displaying the unit value for each waterfall element so you can check what are the unit price, unit cost and profit by product.

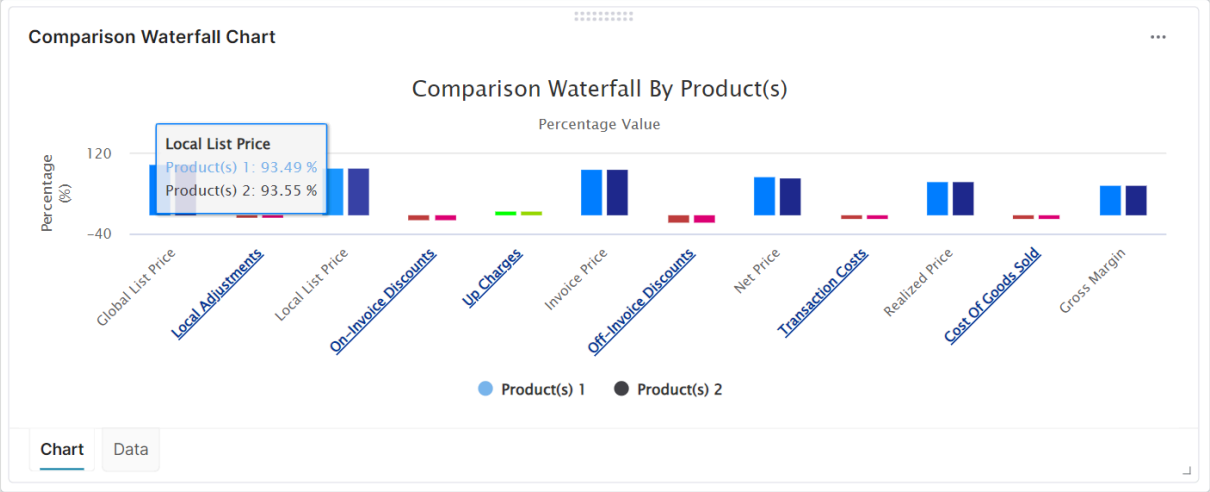


Comparison Waterfall per Product(s)

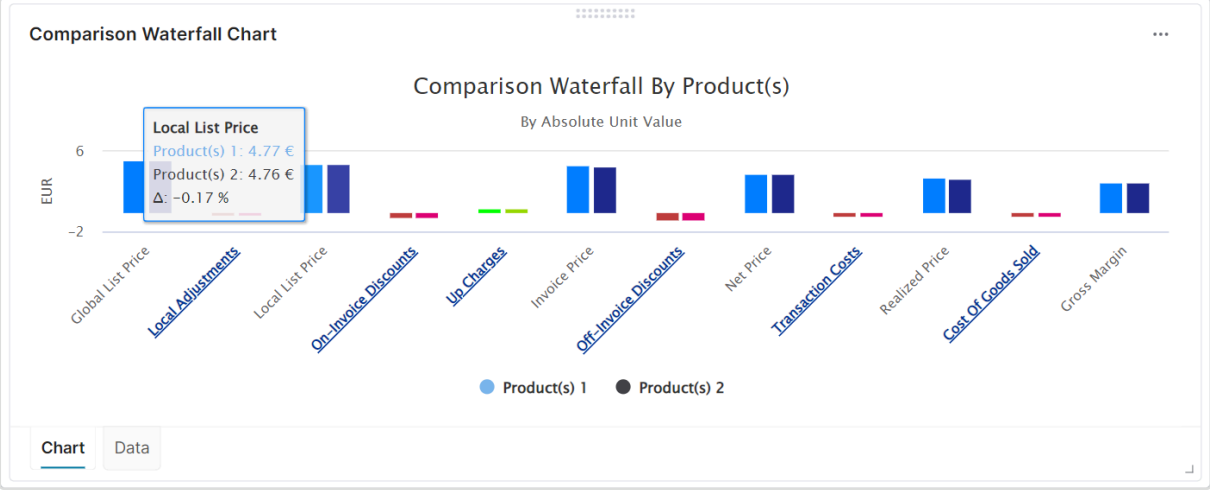
Waterfall Model is Absolute



Waterfall Model is Percentage

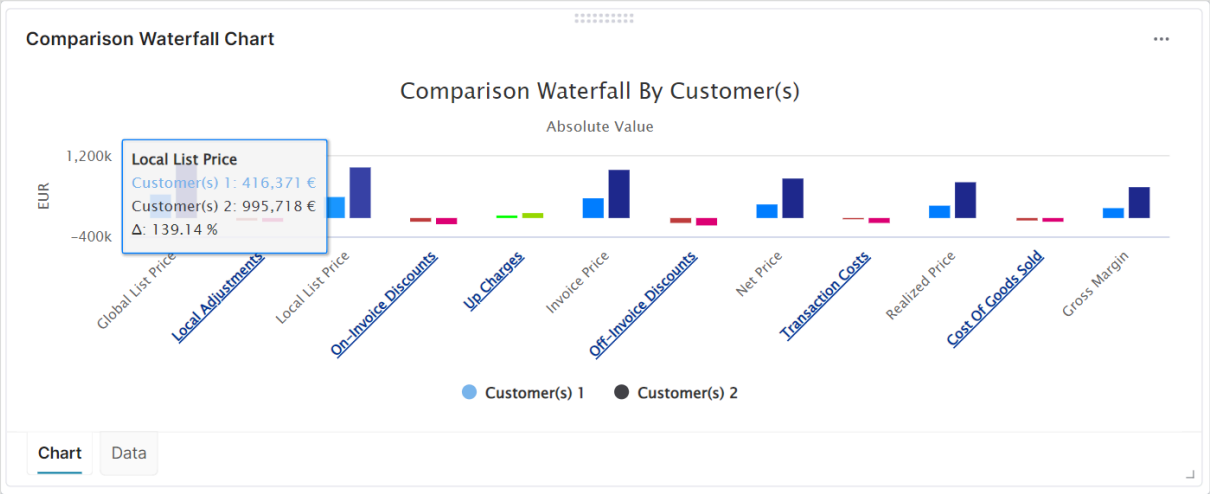


Waterfall Model is By Absolute Unit

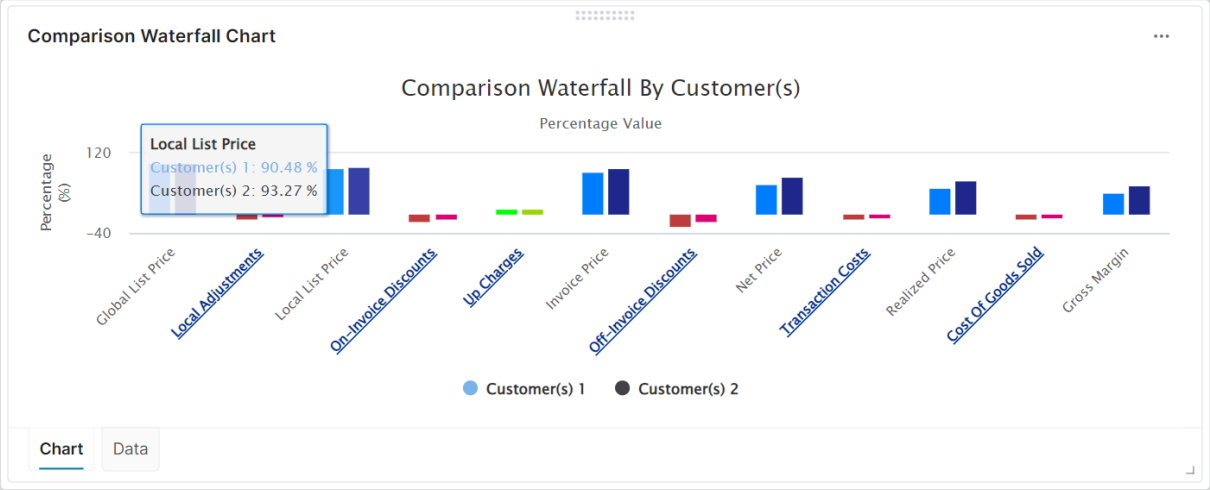


Comparison Waterfall per Customer(s)

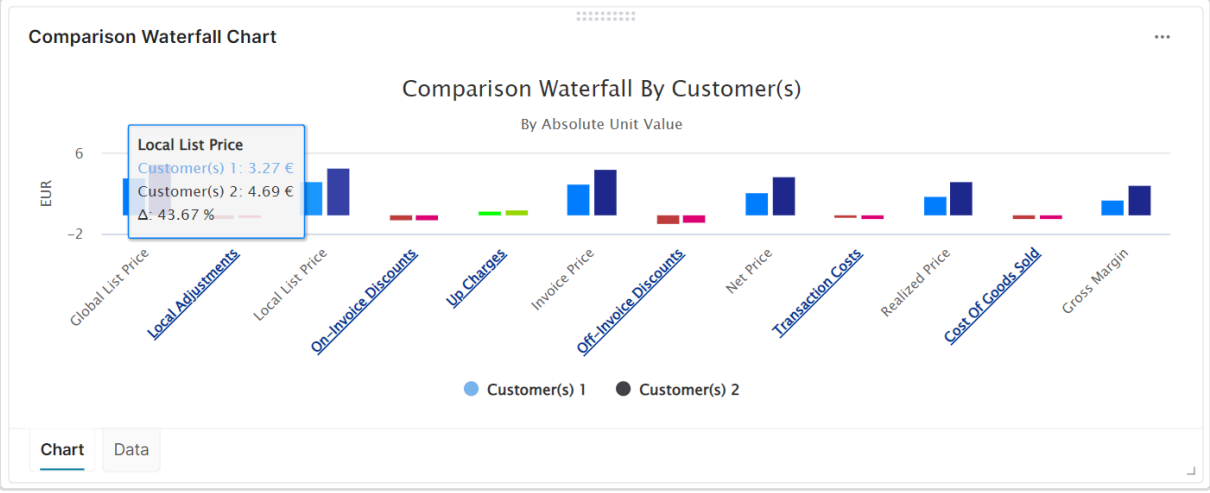
Waterfall Model is Absolute



Waterfall Model is Percentage



Waterfall Model is By Absolute Unit



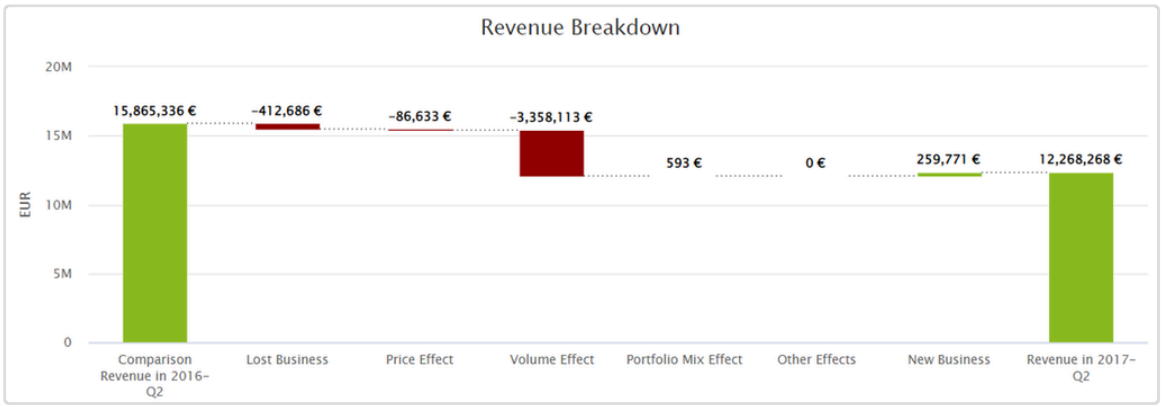
Used Advanced Configuration Fields

To learn about used advanced configuration fields, see Waterfall Comparison Dashboard (Technical User Reference).

Revenue Breakdown Dashboard

> From version 1.7.0, the calculation formula has been changed to show more clarity and accuracy of measurement for business decision-making. The old formula is referred to as Legacy and the new one is referred to as Standard. Standard is also the default formula when deploying the package since 1.7.0.

Revenue Breakdown Dashboard shows you what the difference in revenue between two periods can be attributed to. It allows you to compare two years or quarters and optionally filter for only certain products and/or customers.



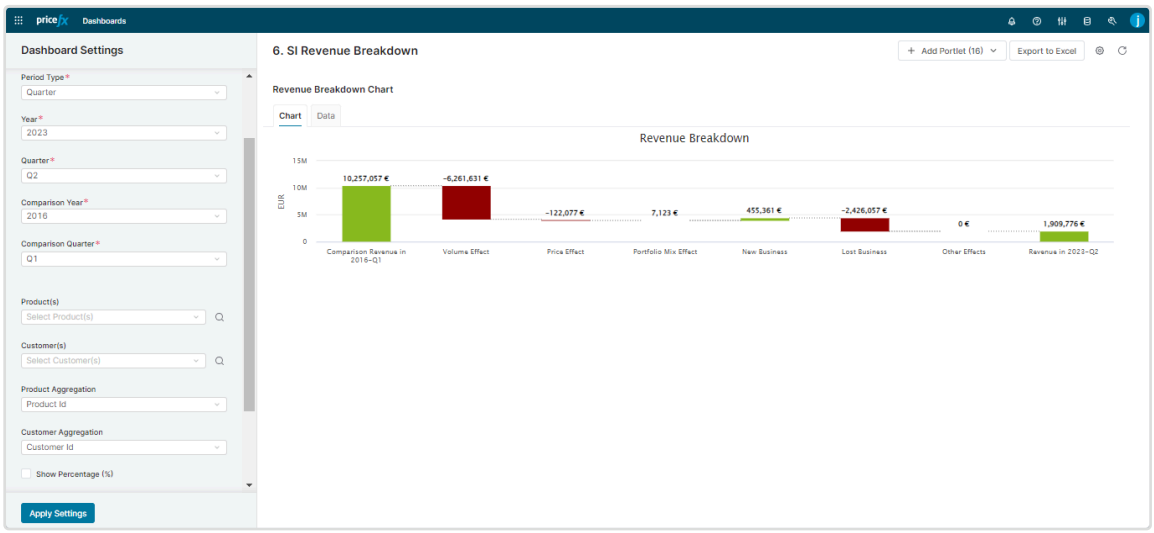
- Set Up Data and Filters
- Analyze Results
- Field Definitions and Calculations

Set Up Data and Filters

For this dashboard you can set the following inputs:

Input	Description
Period Type	Allows you to select the period type for both comparison periods. Available time units: • Week • Quarter • Month • YTD • Custom According to the selection, relevant inputs are displayed to allow for the particular time units values definition. **Default Value:** `MAX(pricingDate)` and if not found, fallbacks to the current year.
Year	Allows you to select the year for the first comparison period. Data for this input are fetched from the `pricingDate` field from `SIP_AdvancedConfiguration`. ℹ The `pricingDate` field must be marked as `Pricing Date` in Transaction Datamart to allow for the system year field generation. **Default Value:** `MAX(pricingDate)` and if not found, fallbacks to the current year.
<*Selected time unit*>	Displays a time unit selected in **Period Type**. It allows you to select a time period for comparison.
Comparison Year	Allows you to select the year for the second comparison period. **Default Value:** `MIN(pricingDate)` and if not found, fallbacks to the previous year.
Comparison <*selected time unit*>	Displays a time unit selected in **Period Type**. It allows you to select a time period for comparison.
Product(s)	Allows you to choose one of product attributes to be used for the analysis. ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Customer(s)	Allows you to choose one of customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (customerId must be mapped in the `SIP_AdvancedConfiguration`). ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Product Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the product data. The product dimensions available in this input are defined in the Advanced Configuration. Fields must come from the Datamart used for the package.
Customer Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the customer data. The customer dimensions available in this input are defined in the Advanced Configuration. Fields must come from the Datamart used for the package. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Show Percentage (%)	Allows you to select whether the values should be displayed as percentage.

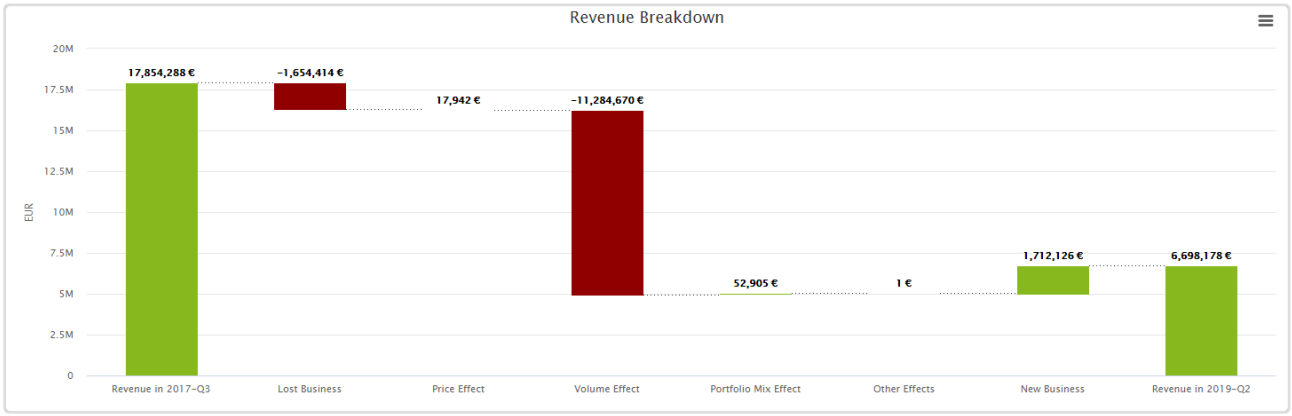
Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from the system `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.



Revenue Breakdown Dashboard

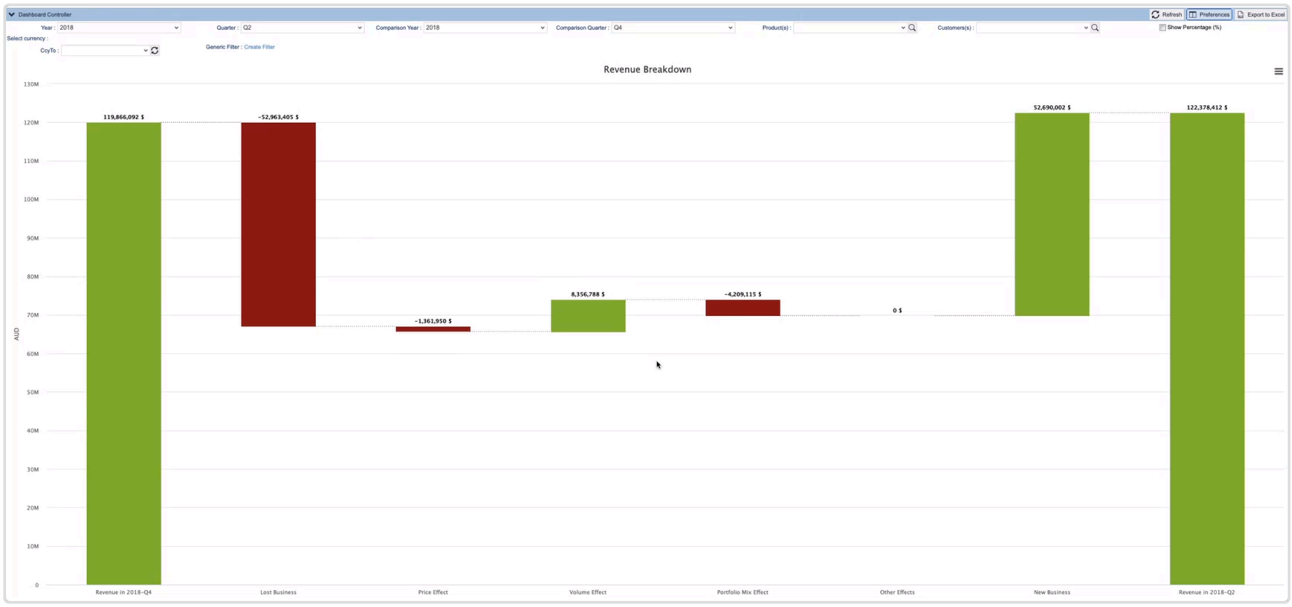
Analyze Results

This chart shows revenue in two periods and tries to associate the difference to categories such as volume, price, new/lost business. For better guidance, loss is shown in red, gain in green. For example, the second column Lost Business shows what amount in revenue was lost due to customers not buying particular products in the first period. But what is clearly the main reason for a smaller revenue in the second period is the significant decrease in volume sold.



Revenue Breakdown Chart

Another example illustrates nicely what is typically expected: when the price is decreased (lost revenue shown in 3rd column), the volume goes up (4th column).



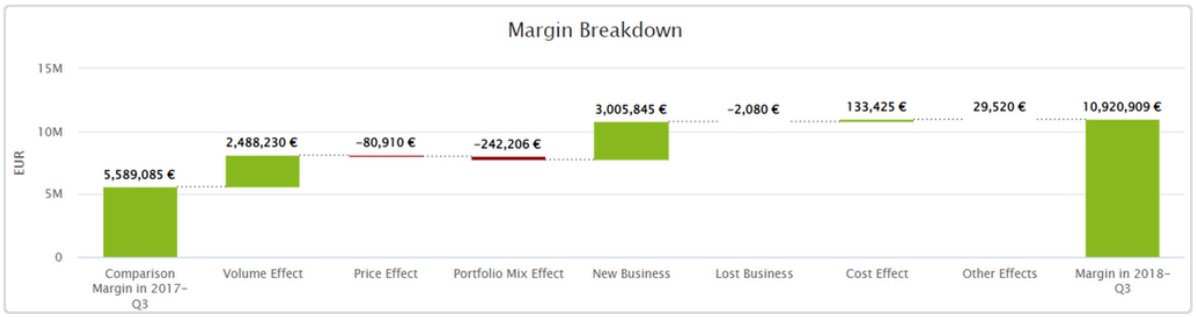
Field Definitions and Calculations

To learn about field and column definitions, field calculations, and list of used advanced configuration fields, see Revenue Breakdown Dashboard (Technical User Reference).

Margin Breakdown Dashboard

From version 1.7.0, the calculation formula has been changed to show more clarity and accuracy of measurement for business decision-making. The old formula is referred to as Legacy and the new one is referred to as Standard. Standard is also the default formula when deploying the package since 1.7.0.

The Margin Breakdown dashboard shows you what the difference in margin between two periods can be attributed to. It allows you to compare two years or quarters and optionally filter for only certain products and/or customers. It includes different calculation options ("models").



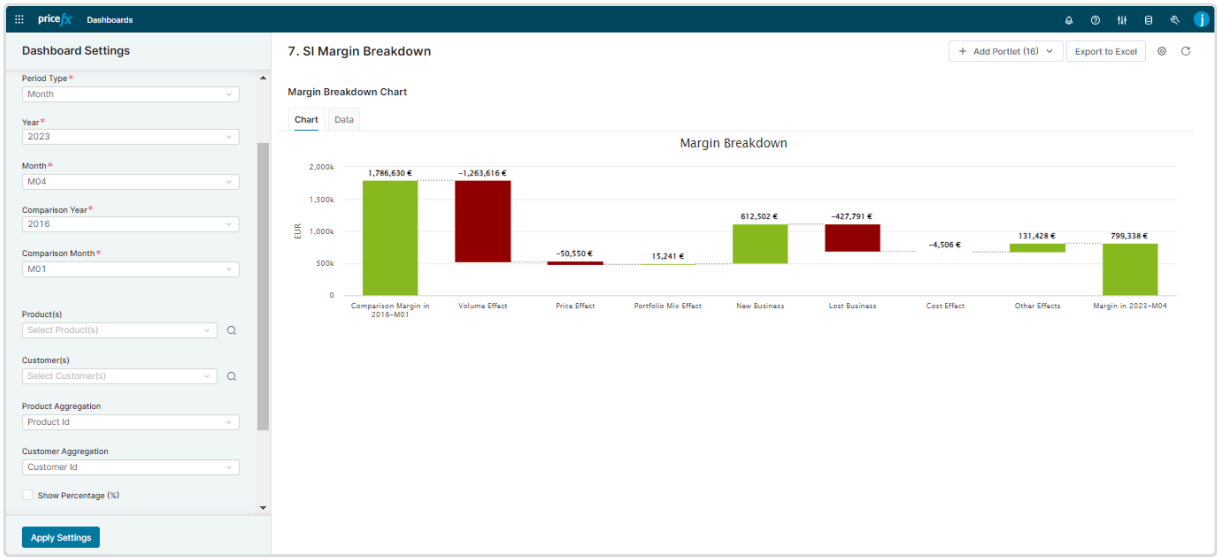
- Set Up Data and Filters
- Analyze Results
- Field Definitions and Calculations

Set Up Data and Filters

For this dashboard you can set the following inputs:

Input	Description
Period Type	Allows you to select the period type for both comparison periods. Available time units: • Week • Quarter • Month • YTD • Custom According to the selection, relevant inputs are displayed to allow for the particular time units values definition.
Year	Allows you to select the year for the first comparison period. Data for this input are fetched from the `pricingDate` field from `SIP_AdvancedConfiguration`. ℹ The `pricingDate` field must be marked as a `Pricing Date` in Transaction DM to allow for the system year field generation.
<Selected time unit>	Displays a time unit selected in **Period Type**. It allows you to select a time period for comparison. **Default Value:** Current (latest available) time unit.
Comparison Year	Allows you to select the year for the second comparison period.
Comparison *<selected time unit>*	Displays a time unit selected in **Period Type**. It allows you to select a time period for comparison.
Product(s)	Allows you to choose one of product attributes to be used for the analysis. ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Customer(s)	Allows you to choose one of customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Product Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the product data. The product dimensions available in this input are defined in the Advanced Configuration. Fields must come from the Datamart used for the package.
Customer Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the customer data. The customer dimensions available in this input are defined in the Advanced Configuration. Fields must come from the Datamart used for the package. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).
Show Percentage (%)	Allows you to select whether the values should be displayed as percentage.
Currency	Allows you to choose the currency to use in the dashboard. The exchange rate for the selected currency is fetched from system `ccy` DS, the currency symbol is fetched from `CurrencySymbols` Company Parameter.

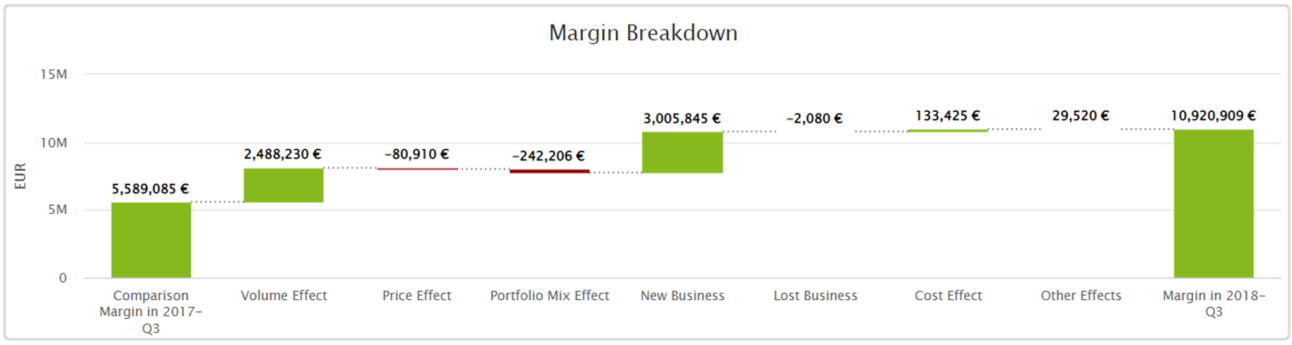
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.



Margin Breakdown Dashboard

Analyze Results

Margin Breakdown Models refer to the way the chart columns are calculated – which driver they emphasize. See the details in Margin Breakdown Dashboard - Fields Definition. For better guidance, loss is shown in red, gain in green.



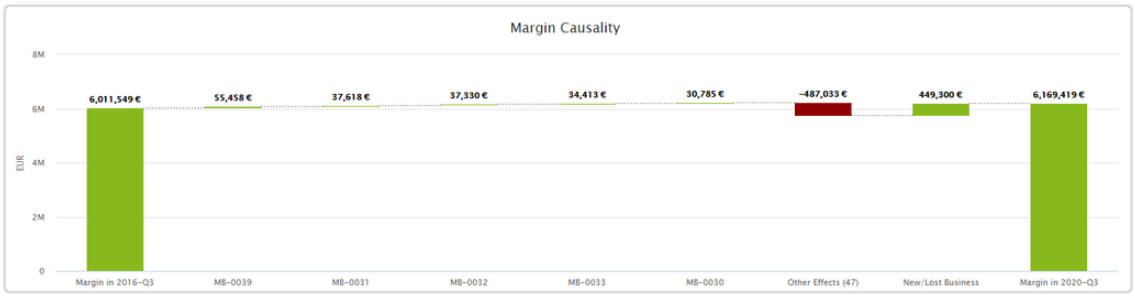
Margin Breakdown Chart

Field Definitions and Calculations

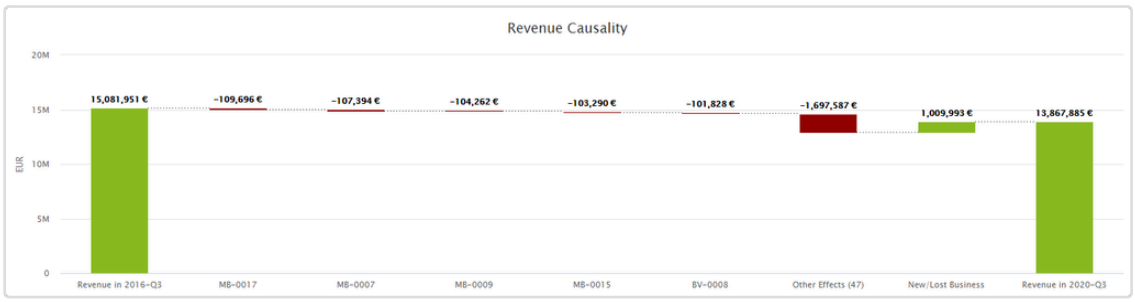
To learn about field and column definitions, field calculations, and a list of used advanced configuration fields, see Margin Breakdown Dashboard (Technical User Reference).

Causality Dashboard

The Causality Dashboard allows you to identify the change in contribution of Product/Customer groups to Total Revenue or Margin between two periods, so you can easily identify problematic parts of the business.



Margin Causality Chart



Revenue Causality Chart

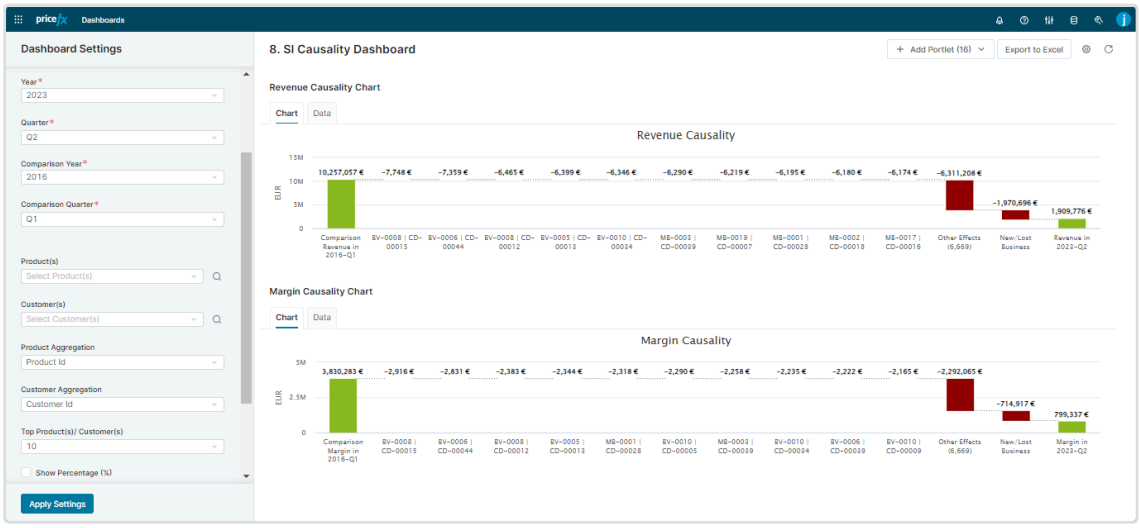
- Set Up Data and Filters
- Analyze Results
- Field Definitions and Calculations

Set Up Data and Filters

For this dashboard you can set the following inputs:

Input	Description
Period Type	Allows you to select the period type for both comparison periods. Available time units: • Week • Quarter • Month • YTD • Custom According to the selection, relevant inputs are displayed to allow for the particular time units values definition.
Year	Allows you to select the year for the first comparison period. Data for this input are fetched from the `pricingDate` field from `SIP_AdvancedConfiguration`. ℹ The `pricingDate` field must be marked as `Pricing Date` in Transaction Datamart to allow for the system year field generation. **Default Value:** `MAX(pricingDate)` and if not found, fallbacks to the current year.
<*Selected time unit*>	Displays a time unit selected in **Period Type**. It allows you to select a time period for comparison. **Default Value:** Current (latest available) time unit.
Comparison Year	Allows you to select the year for the second comparison period. **Default Value:** `MIN(pricingDate)` and if not found, fallbacks to the previous year.
Comparison <*selected time unit*>	Displays a time unit selected in **Period Type**. It allows you to select a time period for comparison.
Product(s)	Allows you to choose one of product attributes to be used for the analysis. ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Customer(s)	Allows you to choose one of customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). ℹ Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Product Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the product data. The product dimensions available in this input are defined in the Advanced Configuration. Fields must come from the Datamart used for the package.
Customer Aggregation	Allows you to define a custom grouping dimension to reduce the granularity of the customer data. The customer dimensions available in this input are defined in the Advanced Configuration. Fields must come from the Datamart used for the package. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`).

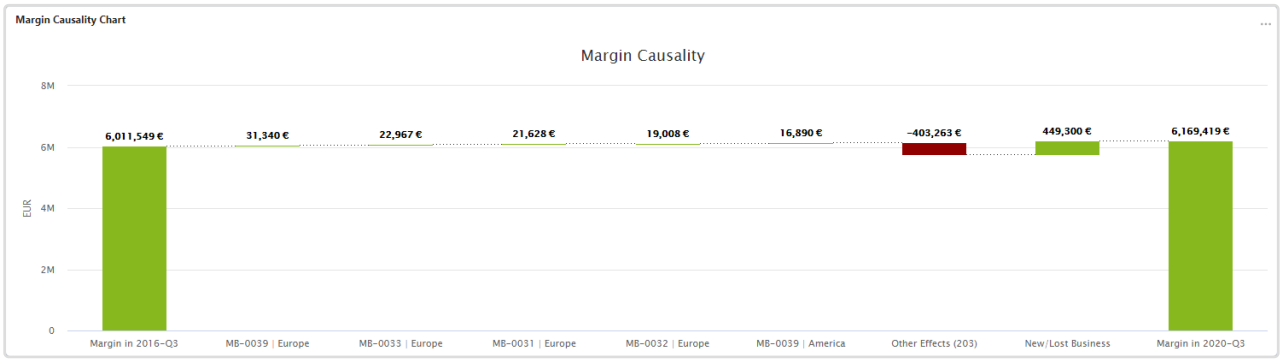
Top Product(s)/Customer(s)	Allows you to choose from a predefined list of values how many product/customer groups should be displayed in between the periods.
Show Percentage (%)	Allows you to select whether the values should be displayed as percentage. **Default Value:** false
Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from the system `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.



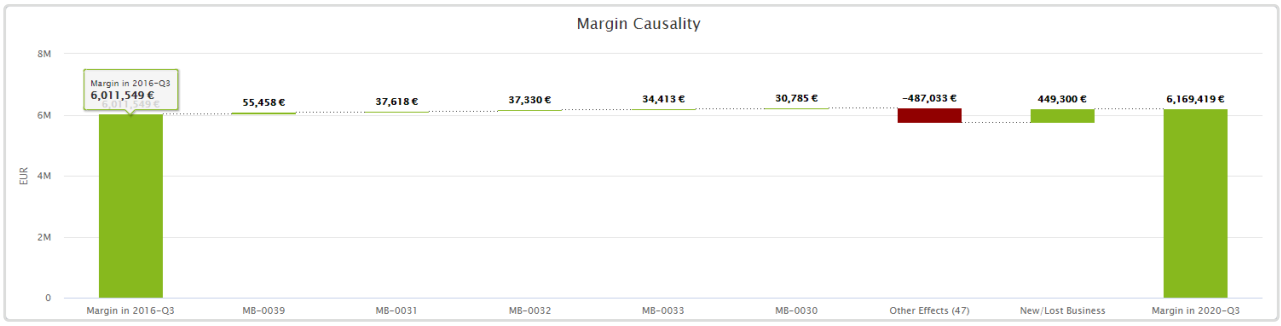
Causality Dashboard Example

Analyze Results

The Margin/Revenue Causality chart displays top X product/customer groups contribution to the total margin when comparing two periods. When both Product and Customer aggregations are set, the dashboard displays the aggregated entries in the form: {Product Aggregation} | {Customer Aggregation}



If any aggregation dimension (in this case Customer) is set to None, the aggregation is skipped.



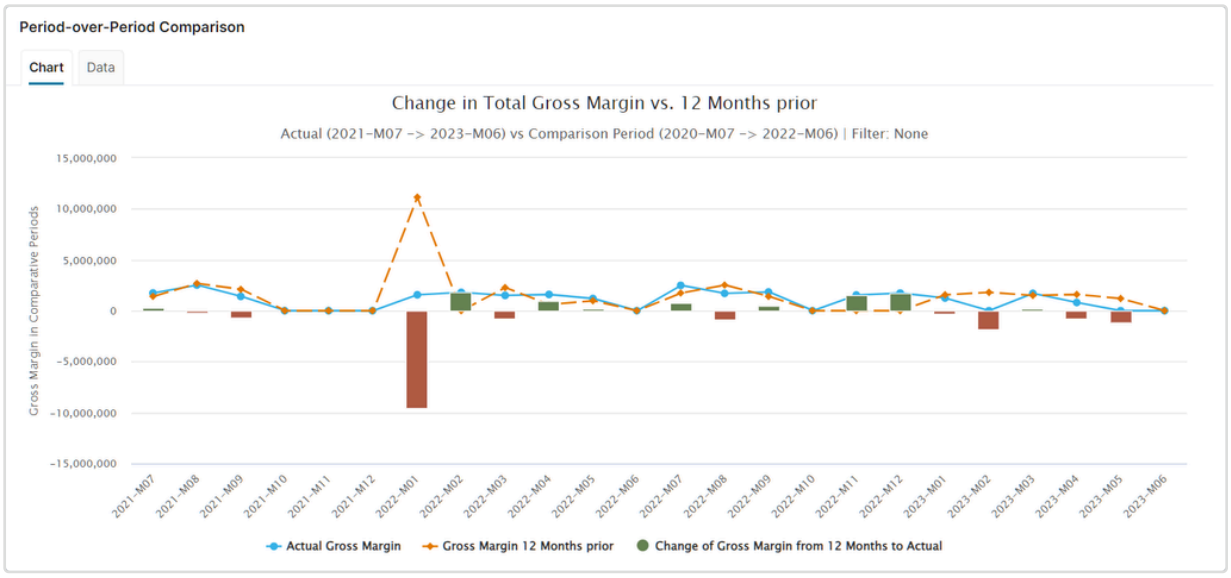
The entries displayed are taken from common business, so the product/customer groups are present in both periods. Any product/customer groups that are not in the common business are grouped up in the New/Lost Business column. Any product/customer groups that are not in top X are displayed as the Other effects column with the number of entries in that group in brackets.

Field Definitions and Calculations

To learn about field definitions, field calculations, and a list of used advanced configuration fields, see Causality Dashboard (Technical User Reference).

Period Over Period Dashboard

The Period Over Period Dashboard shows the difference in a selected measure between two periods. This helps you assess the most recent status of any financial or volume measure and compare its performance to the same time period in the past.



- Set Up Data and Filters
- Analyze Results
- Field Definitions and Used Advanced Configuration Fields

Set Up Data and Filters

For this dashboard you can set the following inputs:

Input	Description
Customer(s)	Allows you to choose one of customer attributes to be used for the analysis. Displayed only when Customer data is used in the package (`customerId` must be mapped in the `SIP_AdvancedConfiguration`). Keep in mind that only columns present in the Transaction Datamart can be used for filtering.
Product(s)	Allows you to choose one of product attributes to be used for the analysis. Keep in mind that only columns present in the Transaction Datamart can be used for filtering.

Measure Type	Allows you to define the measure type for further measure selection.
	
	Available values:
	
	• **Single Column** – Allows you to select a Datamart field containing a metric. If selected, this input becomes available: **Measure Column** where you select a measure (from the Datamart) which is used for the comparison.
	• **Ratio** – The output measure is calculated by a formula using two input values (measures) defined in further selection. If selected, in the new input **Ratio Type** you can select from:
	  ◦ Gross Margin %
	  ◦ List-to-Invoice Realization %
	  ◦ Incentive %
	  ◦ Price Realization %
	  ◦ Price Leakage %
	  ◦ Average Price Per Unit
	  ◦ Average Profit Per Unit
	  ◦ Custom
	  ◦ (1st formula input), labeled according to the Ratio Type selection, typically the numerator.
	  ◦ (2nd formula input), labeled according to the Ratio Type selection, typically the denominator.

Scale Change Bars as %	Affects whether the Change series in the chart is displayed as an absolute value or as a relative one (Actual *Measure Column* as % of Comparison Period).
Display Z Axis	Affects whether the Change series in the chart are equipped with a separate Z axis using its own scale or whether it uses a common Y axis shared with the Actual *Measure Column* and Comparison Period series.
Interval Size	Defines the time granularity of the displayed output. Available values: • Day • Week • QuadWeek • Month • Quarter • Year When Interval Size changes, values of Number Of Intervals and Offset of Comparison Period input are automatically converted to respect the scope of the original Interval Size.

	Since the 1.12.0 release, the method for enumerating intervals has been updated to exclude week 53 from the QuadWeek interval size.
Number of Intervals	Allows you to set the length of the period (e.g. 12 months, 4 quarters).
Offset of Comparison Period in *[Intervals]*	Defines how many intervals (i.e. days, weeks, months, etc.) the Comparison Period should go backwards from the end of the Actual Period (i.e. measured from the Final Interval).

Final Interval	Defines the end of the Actual (most recent) period (e.g. a specific month, quarter or year). Available values are:
	• **Latest Whole Interval**
	• **X Whole Intervals Ago** – If selected, this additional input is displayed: **Final Interval: X Whole Intervals Ago** where you define before how many whole previous intervals the Actual Period should end (e.g. it should end 3 months ago).
	• **Manual Entry** – If selected, this additional input is displayed: **Final Interval: Manual Entry** where you set the final interval manually by the exact name of the period relevant to the interval size. E.g. “2022-W10”, ”2021-Q1”, ”2020-QW3”,… The format is:
	  ◦ Interval Size = Day → YYYY-DXXX (e.g. 2020-D123)
	  ◦ Interval Size = Week → YYYY-WXX (e.g. 2020-W30)
	  ◦ Interval Size = QuadWeek → YYYY-QWXX (e.g. 2020-QW3)
	  ◦ Interval Size = Month → YYYY-MXX (e.g. 2020-M12)
	  ◦ Interval Size = Quarter → YYYY-QX (e.g. 2020-Q3)
	  ◦ Interval Size = Year → YXXXX (e.g. Y2020)

Include Impact Period	Allows you to highlight a specific portion of your chart and get detailed information displayed for it under the chart. For details see how to read the results.
	• **Final Impact *[Interval]*** – Defines the end of the Impact Period.
	  ◦ If the Interval Size is Day, the default value is the current day.
	  ◦ For all other Interval Sizes (Week, QuadWeek, Month, Quarter, Year), the default value is the end of that period.
	• **Length of Impact Period** – Sets the duration in time units selected in **Interval Size**.

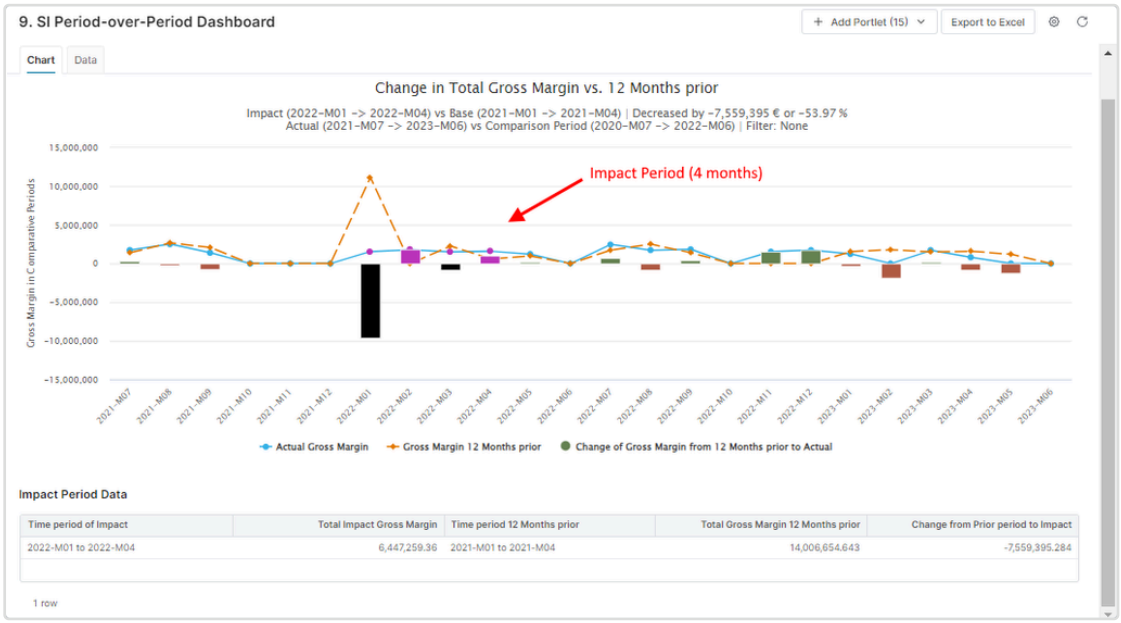
Currency	Allows you to choose the currency used in the dashboard. The exchange rate for the selected currency is fetched from the system `ccy` Data Source, the currency symbol is fetched from the `CurrencySymbols` Company Parameter.
Generic Filter	Allows you to set up a generic transaction data filter. For example: display only data from Europe, or Asia.

Analyze Results

This chart shows the difference in a selected measure between two periods. This provides you with data to assess the most recent status of any financial or volume measure and compare its performance to the same time period in the past.

The selected measure is compared using the Actual Period and Prior Period lines (both of the same length); difference between these two is shown using red/green change bars. For further analysis, you can also use Impact Period which provides more details on a selected part of your chart.

The granularity of the periods (days, weeks, months, etc.) is defined in **Interval Size**.



Period over Period Chart

Chart Series	Description
Actual Period (blue solid line)	Typically the most recent period. Its duration is defined using the inputs **Final Interval** and **Number Of Intervals**, as described here.
Comparison Period (orange dashed line)	A period in the past which you want to compare with the Actual Period.
Change bars	Difference between Actual Period and Comparison Period. The bars show the progress of the selected measure: • Green if the change for the respective period is positive. • Red if the change is negative.

Impact Period	Represents a portion of the Actual Period for which you get detailed data. Using Impact Period is helpful for further analysis of a specified part of the chart without having to leave this screen. Once the Impact Period is defined, you get:
	• Additional chart subtitle with a calculated impact value.
	• Summary table with Impact Period data under the chart.
	• Different colors of the change bars for the whole Impact Period:
	  ◦ Purple if the change for the respective period is positive (instead of green).
	  ◦ Black if the change is negative (instead of red).

Field Definitions and Used Advanced Configuration Fields

To learn about field definitions and used advanced configuration fields, see Period Over Period Dashboard (Technical User Reference).

Admin User Reference (Sales Insights)

- Mandatory Data (Sales Insights)
- Installation (Sales Insights)

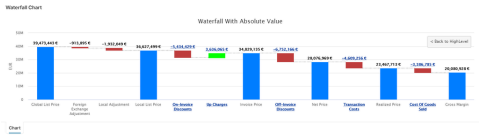
Mandatory Data (Sales Insights)

<table>
<tr><th>Type</th><th>Data</th><th>Fields</th><th>Use Case</th></tr>
<tr><td>Transaction Data</td><td>Sales Data (Transactions Datamart)</td><td>

Unique Id (String)
Product Id (String)
Customer Id (String) – mandatory if Customer Master is deployed
Pricing Date (Date) – Can be mapped “PricingDate", "valid from", "BillingDate" or any other field that in the customer’s context represents the date that you want to see that transaction recognized. This date is used for filtering/grouping operations.
Invoice Price (Money/Number)
Gross Margin (Money/Number)
Quantity (Quantity/Number)

Optional:

Currency (you need filled Ccy Datamart when using currency)
UoM
Additional waterfall fields

</td><td>
You can add additional fields for your waterfall definition – any field that follows your pricing journey starting from the list price and ending at the pocket price.


You can have different price points as well as adjustments. Typically you have items such as (bold = price points, adjustments in between):

List Price
Local Adjustments
Local List Price
On-Invoice Discounts
Invoice Price
Off-Invoice Discounts
Net Price
Transaction Cost
Cost
Gross Margin

Other optional data (mandatory for specific dashboards):

Period Over Period dashboard:

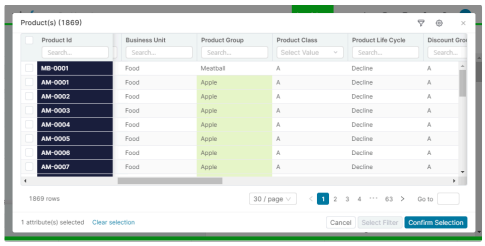
List Price
Net Price

Regional Revenue and Margin dashboard:

Continent
Country
City / Region

</td></tr>
<tr><td rowspan="2">Master Data</td><td>Product</td><td>

Product ID
Product Name
Up to 30 custom attributes

</td><td rowspan="2">
The Product / Customer Master data is used in two scenarios: Filtering and Dimensions.
Filtering allows you to define which Products/Customers to include in your analysis.


Typically you may want to include the following fields:
Product:

Product Hierarchy
Product Group
Brand
Product performance markers:

Product Class
Competitive/Captive
Product Lifecycle
Basic/Premium Products

Customer:

Regional Data / Org Data

Country
Region
Sales Office
Sales Org

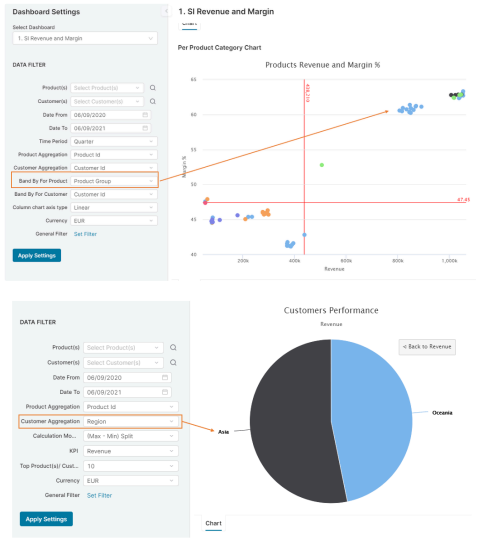
Customer performance markers:

Loyalty
Size/Classification

</td></tr>
<tr><td>Customer</td><td>

Customer ID
Customer Name

</td></tr>
</table>

		• Up to 30 custom attributes	**Dimensions**. In this use case you define Product/Customer aggregation to view your portfolios from different angles. You can find this aggregation in chart types such as Pie charts (in definition of the “pieces”) or Scatter charts (Band by option). 

Whatever mapping you choose initially, you can later change in the Advanced Configuration Options in `SIP_AdvancedConfiguration`. Sales Insights Package does not pre-aggregate any data, so the change has an instant effect on the dashboards.

Installation (Sales Insights)

This tutorial will guide you through the installation of the Sales Insights Accelerator.

Prerequisites

- Common prerequisites for all accelerators
- Specific prerequisites
  - License on the partition must cover the Analytics and Dashboards modules
  - Transaction data in the Datamart structure with **required fields**. For details see Mandatory Data (Sales Insights).
  - Optional Transaction data (mandatory for specific dashboards, such as Period Over Period or Regional Revenue and Margin). For details see Mandatory Data (Sales Insights).
  - For additional waterfall fields see Waterfall Dashboard - Advanced Configuration.

Installation Steps

Select Partition for Deployment

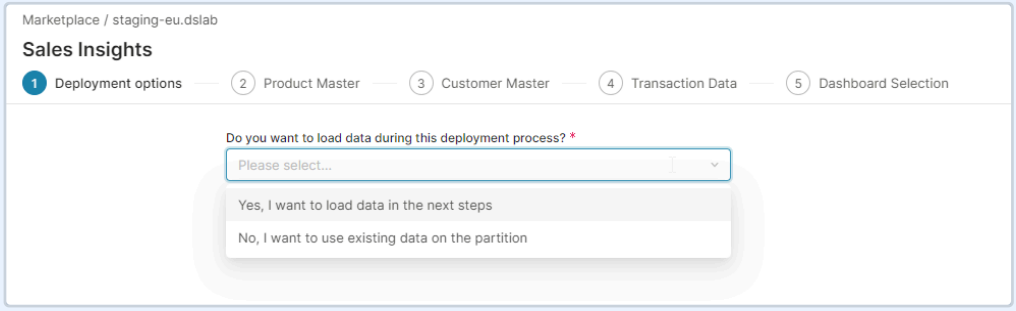
1. Go to PlatformManager at https://platform.pricefx.com/ and log in.
2. Go to **Marketplace** and find the *Sales Insights* package.

   Note: There are three types of packages:
   - Sales Insights – full package
   - Sales Insights Dashboards – dashboards package, it skips data upload steps, there is no data mapping
   - Sales Insights Upgrade – upgrade package of any Sales Insights package
3. Click the package tile, select the partition where you want to deploy the accelerator package and confirm the deployment dialog to start.

For detailed description of all deployment options, see PlatformManager documentation.

Go Through Deployment Steps

If you would like to skip loading of the transaction data, you can select the **No, I want to use existing data on the partition** option on the **Deployment options** screen.

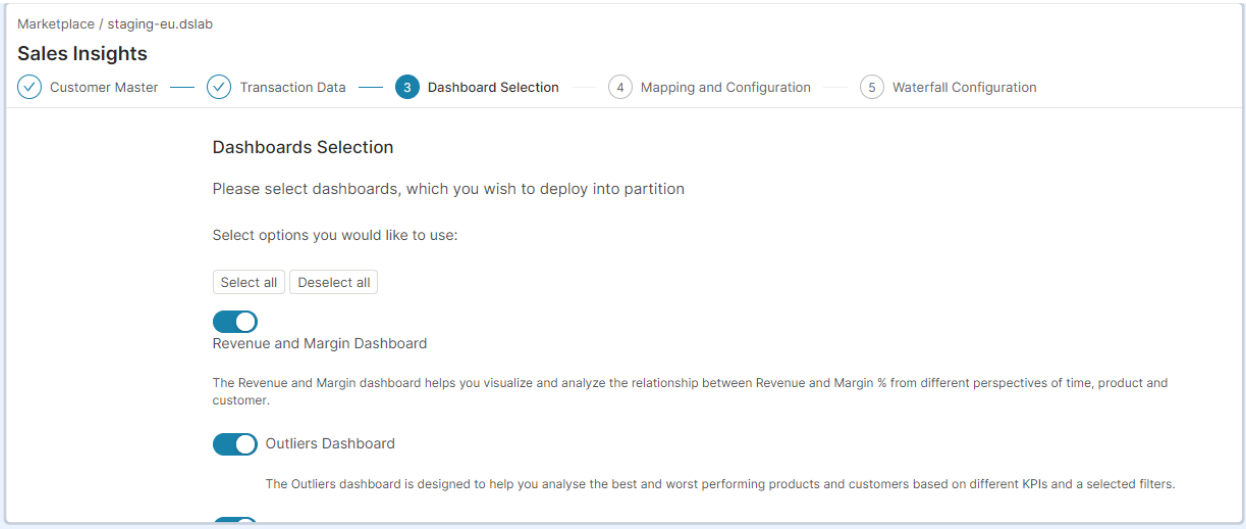


Deployment Options Step

If you select this option you will skip the following steps:

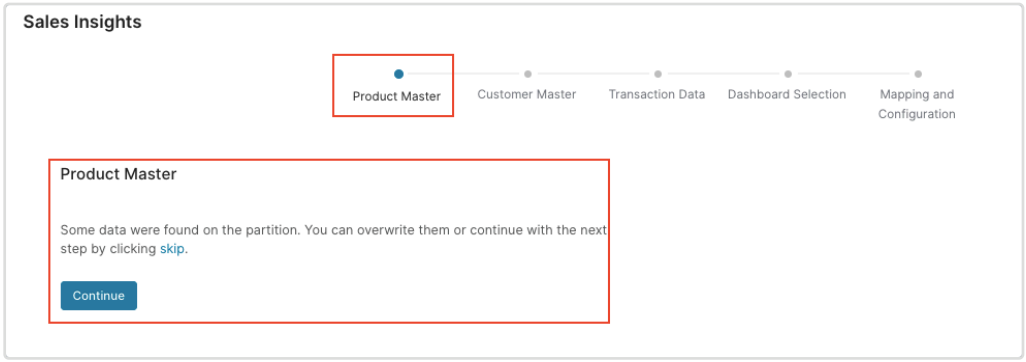
- **Product Master**
- **Customer Master**
- **Transaction Data**

You will forwarded directly to the **Dashboard Selection** step.



Dashboard Selection Step

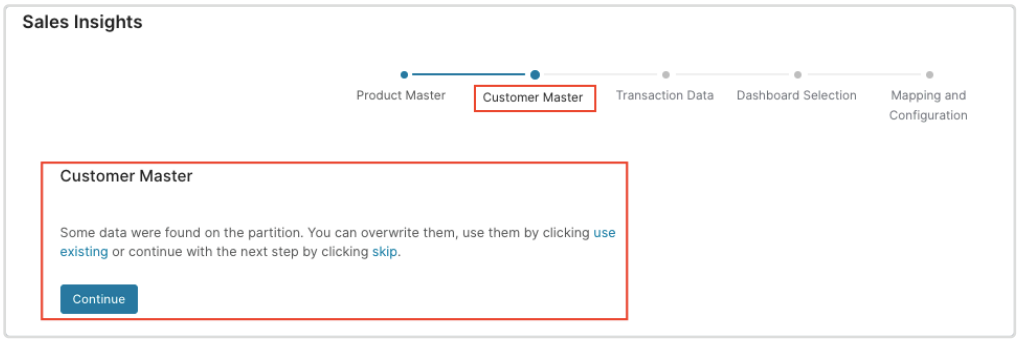
1. Product Master Step



Options

Option	Description
Continue	Click this button if you want to upload your product data.
Skip	Click this link if you want to use the existing product data on the partition.

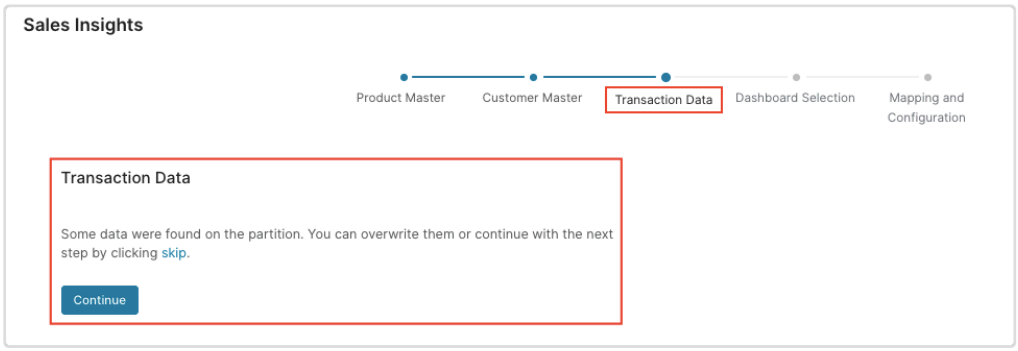
2. Customer Master Step



Options

Option	Description
Use Existing	Click this link if you want to use the existing customer data on the partition.
Skip	Click this link if you do not want to use the customer data. Then there is only the Product(s) input used and displayed after the deployment, there is no Customer(s) input filter.
Continue	Click this button if you want to upload your customer data.

3. Transaction Data Step

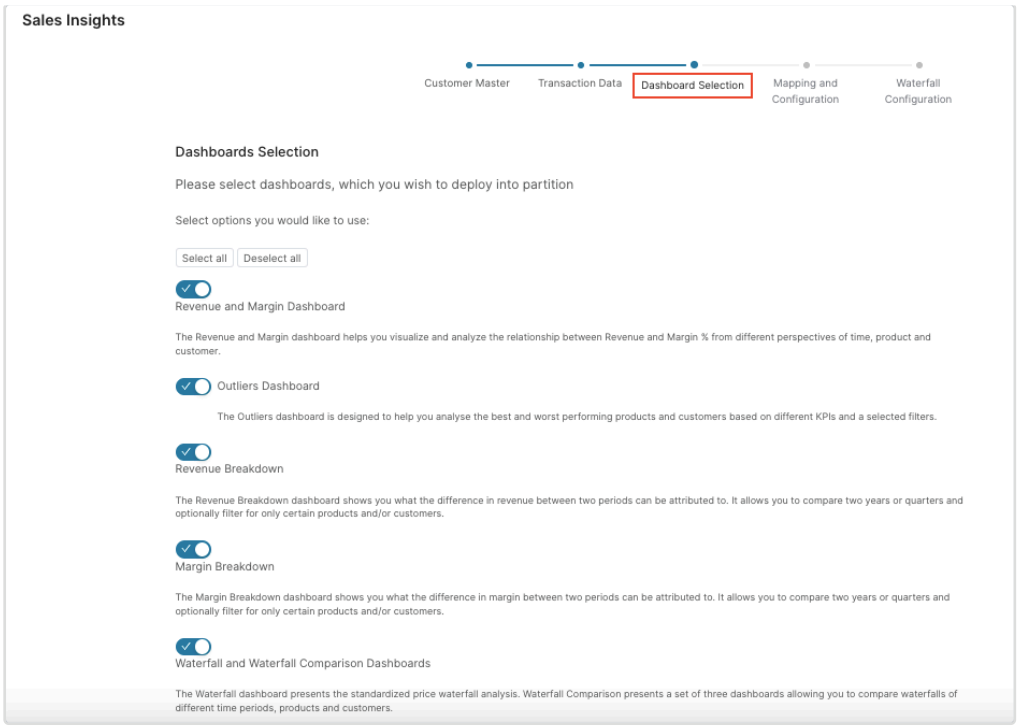


Options

Option	Description
Continue	Click this button if you want to upload your transaction data.
Skip	Click this link if you want to use the existing transaction data on the partition.

4. Dashboard Selection Step

Select which dashboards you want to deploy into the partition.



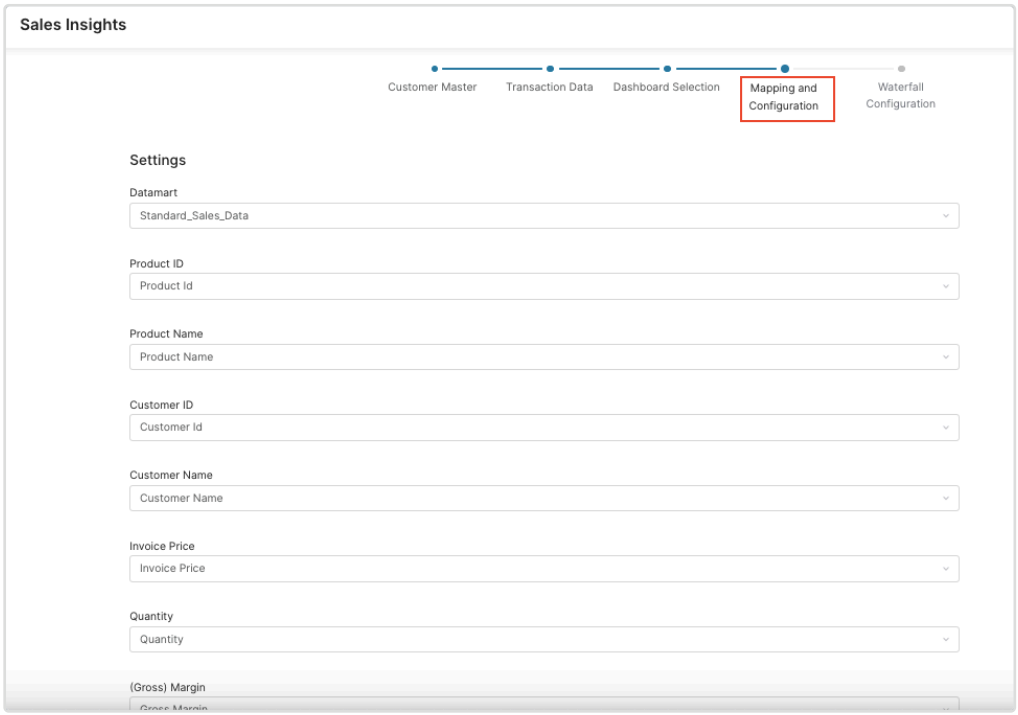
5. Mapping and Configuration Step

The Sales Insights Dashboard requires certain data fields available in the Datamart. In this step you will select which fields of your Datamart contain certain specific pieces of data, e.g. product ID, customer ID, invoice price, etc. required by the dashboards.

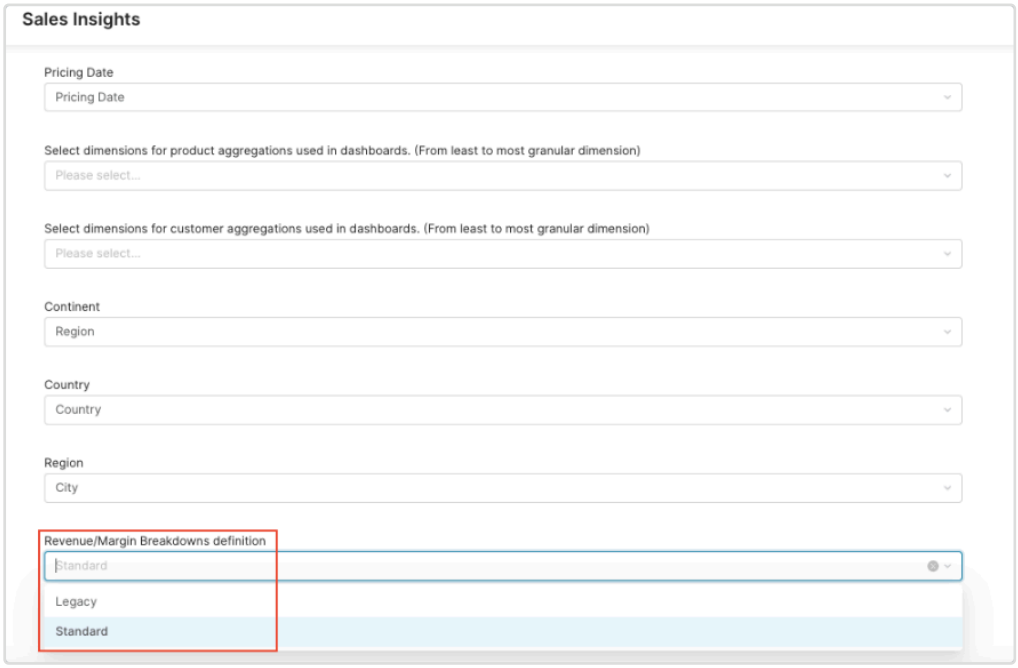
Some of the data values are required, some of them are optional, and some are used only in specific dashboards.

In case you skipped the Customer Master step, please **do not map the Customer ID and Customer Name field** in this step. You also should have the Region, Country, City field in your Datamart if you want to use the Regional Revenue and Margin dashboard.

In the 1.12.0 release we have fixed the issue that user was not presented with the previous setting of the accelerator when it was deployed.



5.1 Revenue/Margin Breakdowns Definition



The Revenue/Margin Breakdowns definition field has been introduced in version 1.7.0. It identifies the formulas which are used to calculate the effect in breakdowns.

Options

Option	Description
Legacy	The previous formulas might be used for older versions or existing customers who still want to use it. The formula definitions can be found in the archived documentation of the previous versions (version 1.6.1 – chapter Revenue Breakdown Dashboard > Fields Definition, Margin Breakdown Dashboard > Fields Definition).
Standard (default)	The current and enhanced formulas used by default. For more details see: • Revenue Breakdown Dashboard - Fields Definition • Margin Breakdown Dashboard - Fields Definition

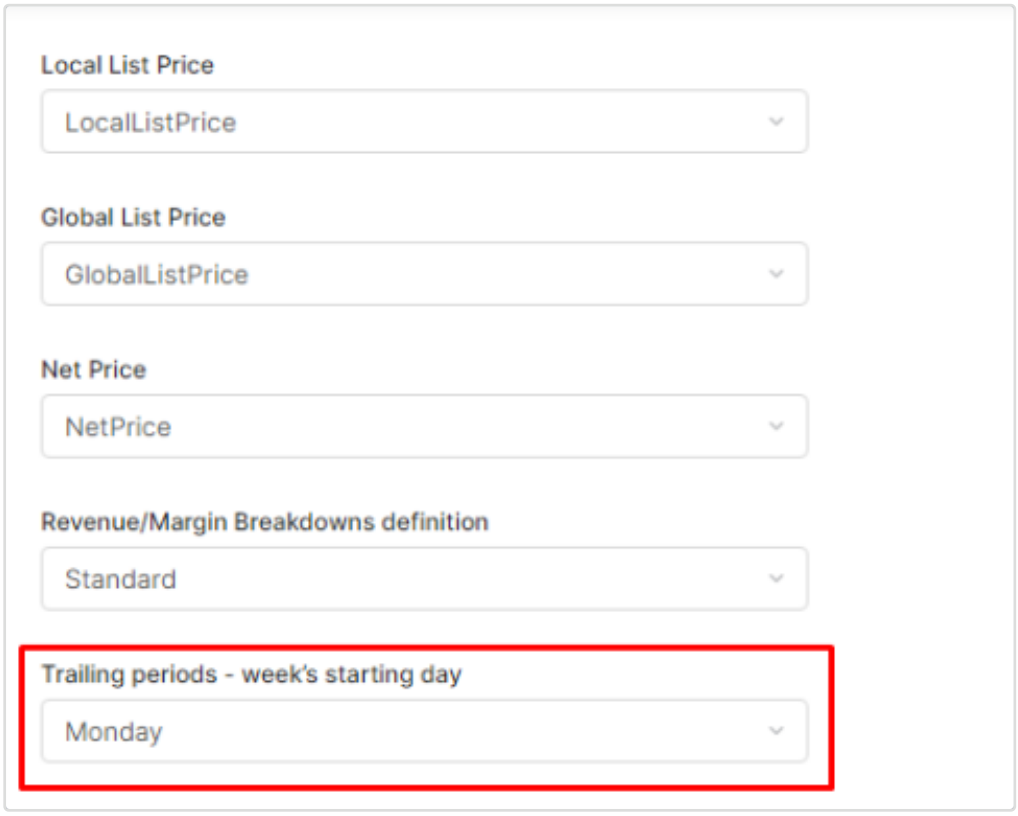
The settings are stored in **Configuration** > **System Configuration** > **Advanced Configuration Options**, under the option `SIP_AdvancedConfiguration` with the name "breakdownMode" and can be updated manually after the deployment.
Sample of *SIP_AdvancedConfiguration*:

```
{
  "datamartName": "Standard_Sales_Data",
  "productId": "ProductId",
  "productName": "ProductName",
  "productGroup": "ProductGroup",
  "customerId": "customerId",
  "customerName": "CustomerName",
  "invoicePrice": "InvoicePrice",
  "quantity": "Quantity",
  "pricingDate": "PricingDate",
  "pricingDateYear": "PricingDateYear",
  "grossMargin": "GrossMargin",
```

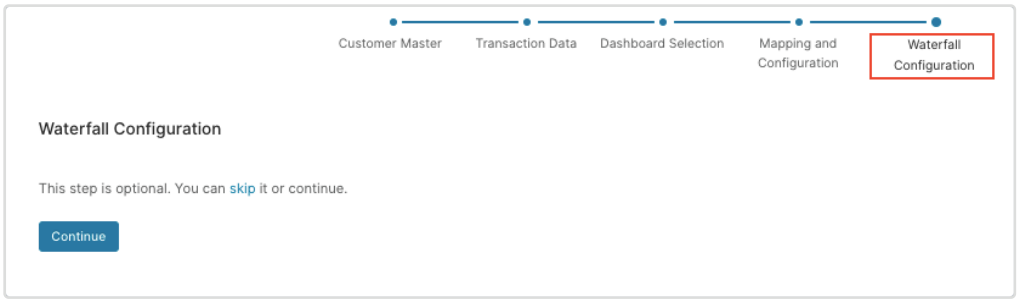
```
    "continent": "Region",
    "country": "Country",
    "region": "City",
    "sector": "",
    "costs": "OtherCOGS",
    "productDimensions": ["ProductId", "ProductClass", "ProductGroup"],
    "customerDimensions": ["CustomerId", "Country", "Region", "CustomerClass"],
    "breakdownMode": "Standard"
}
```

5.2 Period Over Period Dashboard Definition

The Period Over Period Dashboard uses calendar units (periods) based on a week definition. The starting day of a week can be configured by providing a value for the “Trailing periods - week’s starting day” input (default is Sunday).



6. Waterfall Configuration Step (Optional)



Options

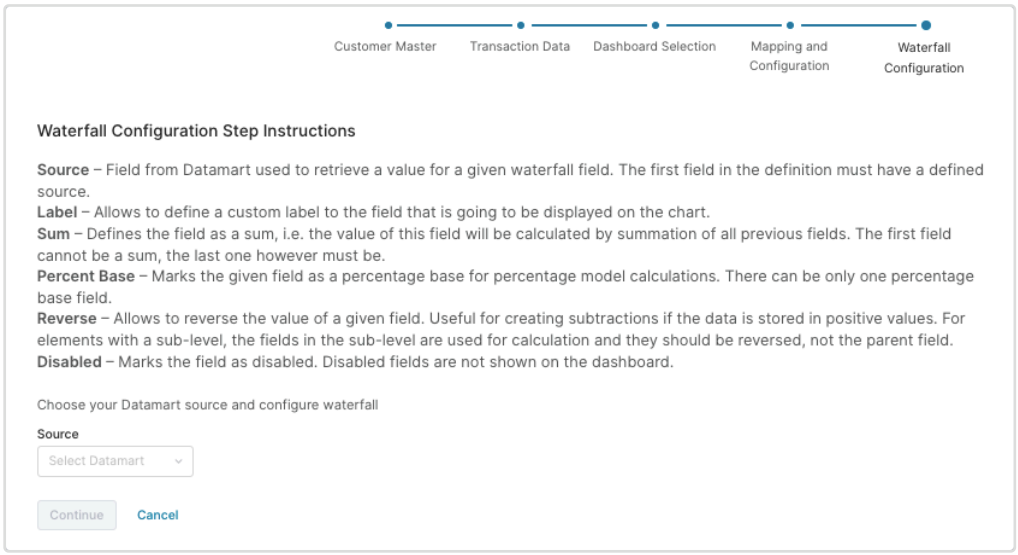
Option	Description
Continue	Click this button if you want to map the waterfall configuration.

Skip	Click this link if you do not want to map the waterfall configuration. In this case, the Waterfall and Comparison Waterfall dashboard will show no data after the deployment.

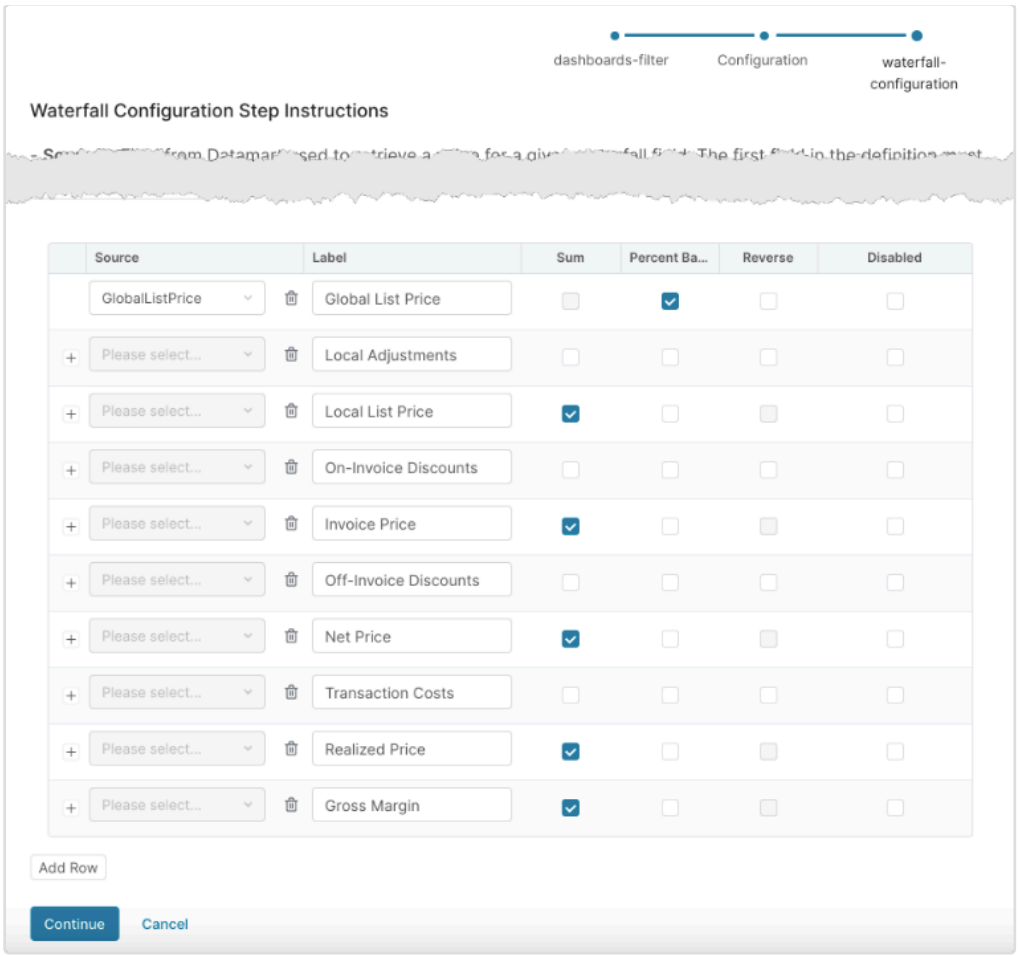
Map the waterfall configuration

a. Click **Continue** to configure the price waterfall elements to be used in the Waterfall dashboard.

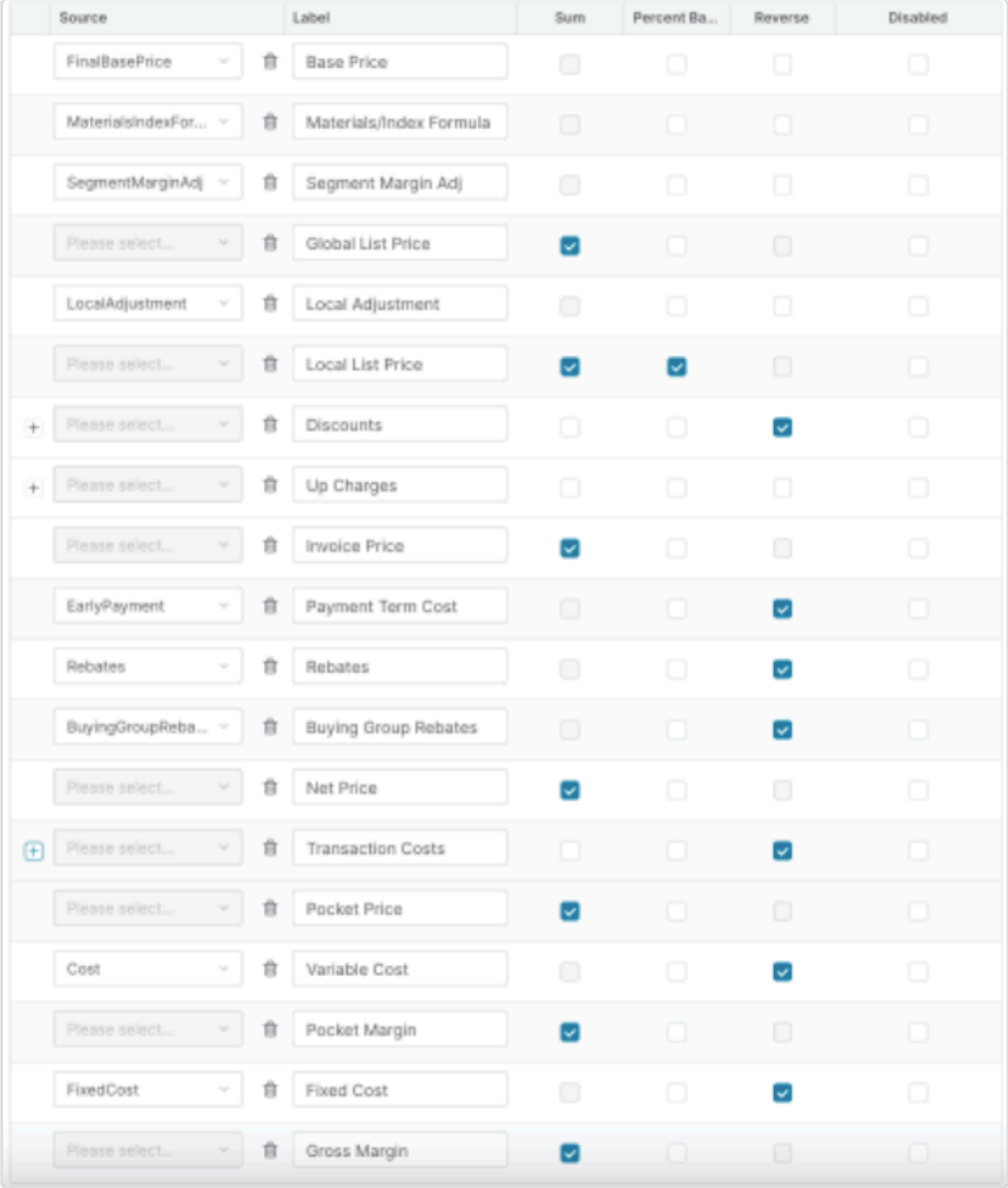
b. Select the Datamart to be used for the Waterfall dashboard.



c. Once you selected the Datamart, the fields will appear. They are automatically pre-populated to guide you. Review the sample waterfall configuration, review your Datamart fields, and then continue with the next step.



d. Set up the waterfall chart elements according to your Datamart fields.



- The value of the first price point element comes from a Datamart field, whereas the next price points (marked with *Sum*) are only virtual.
- We marked one price point as *Percent Basis*, so if the user would like to see the waterfall chart in percentage scale (instead of money), such a price point will be 100% and all other waterfall elements will be proportional to that price point. Usually the reference List Price like *Global List Price* is set as *Percent Basis*.
- We marked some adjustments as *Reverse* because their value stored in the Datamart is positive, but they should appear as negative adjustments.
- We placed some adjustments into groups (they have the "plus" sign on the left), so that the user can collapse and expand them.

If you want to update/change the mapping, you can do it manually in **Configuration** > **System Configuration** > **Advanced Configuration Options**, under the option `waterfall-configuration`.

Sample of `waterfall-configuration`:

```
{
  "waterfall-configuration": {
    "dataMart": "Standard_Sales_Data",
    "fields": [{
          "name": "GlobalListPrice",
          "label": "Global List Price",
```

```
            "isSum": false,
            "isPercentBase": true,
            "disabled": false,
            "isSubtract": false
        }, {
            "name": null,
            "label": "Local Adjustments",
            "isSum": false,
            "isPercentBase": false,
            "disabled": false,
            "isSubtract": false,
            "subLevel": [{
                "name": "ForeignExchangeAdjustment",
                "label": "Foreign Exchange Adjustment",
                "disabled": false,
                "isSubtract": true
              }, {
                "name": "LocalAdjustment",
                "label": "Local Adjustment",
                "disabled": false,
                "isSubtract": true
              }
            ]
        }, {
            "name": null,
            "label": "Local List Price",
            "isSum": true,
            "isPercentBase": false,
            "disabled": false,
            "isSubtract": false
        }, {
            "name": null,
            "label": "On-Invoice Discounts",
```

e. Once all waterfall chart elements are defined, click **Continue**. This process takes around a minute to finish.

Upgrade

It is possible to upgrade only used logics without making any changes to the configuration. In PlatformManager, navigate to Marketplace, and find the Sales Insights Dashboards package with the tag *Upgrade*. Once you deploy it, only logics are deployed, the configuration remains without changes.

Technical User Reference (Sales Insights)

Dashboards Configuration (Sales Insights)

- Revenue and Margin Dashboard - Configuration Details
- Regional Revenue and Margin Dashboard - Configuration Details
- Outliers Dashboard - Configuration Details
- Waterfall Dashboard - Configuration Details
- Waterfall Comparison Dashboard - Configuration Details
- Revenue Breakdown Dashboard - Configuration Details
- Margin Breakdown Dashboard - Configuration Details
- Causality Dashboard - Configuration Details
- Period Over Period Dashboard - Configuration Details

The dashboards are initially set with the Default preference, which will be updated using the Accelerator.

Revenue and Margin Dashboard - Configuration Details

Used Company Parameters

Path

Company Parameters > `PFXTemplate_DB_RevenueAndMargin`

Name	Value	Description
bucketStartPercent	0-1, e.g. 0.2	Defines the starting percentage for the buckets in the Contribution charts.
bucketEndPercent	0-1, e.g. 0.8	Defines the ending percentage for the buckets in the Contribution charts.
numberOfBuckets	any Integer, e.g. 10	Defines the number of buckets in the Contribution charts. The values displayed on each bucket will depend on start/end values.
histogramBins	any Integer, e.g. 10	Number of bins displayed in the Pareto charts.
scatterPlotPercent	0-1, e.g. 0.1	Defines the percentage at which the revenue/margin plot lines will be displayed on the Revenue and Margin % charts.

Field Calculation

Field	Formula
Revenue	SUM(revenue)
Margin	SUM(grossMargin)
Margin %	SUM(grossMargin) / SUM(revenue) * 100

Default Filters

There are some default filters applied on various fields to ensure proper calculations. These are:

- Only entries with **not null grossMargin** are considered.
- Only entries with **not null invoicePrice** are considered.

Data Requirements

Before deploying this package, it is possible to modify some parameters of this dashboard to adapt to an existing Datamart. The following fields are used for the setup:

Field Name	Description	Required
Datamart	Datamart used in the analysis	Yes
Product Id	Product Id field in the transactional data	Yes
Customer Id	Customer Id field in the transactional data	No
Invoice Price	Field representing revenue in the transactional data	Yes
Gross Margin	Field representing margin in the transactional data	Yes
Pricing Date	Field representing date of the transaction in the transactional data	Yes
Product Name	Product name field in the data	No
Customer Name	Customer name field in the data	No

For more details see Mandatory Data (Sales Insights).

See Also

Revenue and Margin Dashboard (Business User Reference)

Regional Revenue and Margin Dashboard - Configuration Details

Supported Map Types

World

- World Continents

Continents

- Europe
- North America
- Asia
- Oceania
- Africa
- South America

Countries

All the countries listed under the Countries heading on the Map Collection page are supported with the exception of countries that have more than one map – in this case only the primary map is supported (e.g., 'Burundi' is supported but 'Burundi, admin2' is not).

For more details see How to Add a Map to Dashboard.

Fields Definition

Fields displayed on the dashboard are calculated in the using the Advanced Configuration field notation:

Field	Formula
Revenue	SUM(revenue)
Margin	SUM(grossMargin)
Quantity	SUM(quantity)
Margin %	SUM(grossMargin) / SUM(revenue) * 100
Deviation WAP	(item revenue / item quantity) - (total revenue / total quantity)
Revenue per Customer	(item revenue) / (number of customers in a given area)
Margin per Customer	(item grossMargin) / (number of customers in a given area)
Revenue per X People	X * (item revenue) / (population in given area)
Margin per X People	X * (item grossMargin) / (population in given area)

By default X is set to 1000.

Default Filters

The following default filters are applied on various fields to ensure proper calculations:

- Only entries with **not null grossMargin** are considered.
- Only entries with **not null invoicePrice** are considered.
- Only entries with **not null quantity** are considered.
- Only entries with **not null continent** are considered (if applicable).
- Only entries with **not null country** are considered (if applicable).
- Only entries with **not null region** are considered (if applicable).

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `customerId` (optional)
- `continent`
- `country`
- `region`
- `grossMargin`
- `quantity`
- `invoicePrice`

Example

Name	Value

`SIP_AdvancedConfiguration`	{
	"datamartName":"Standard_Sales_Data",
	"productId":"ProductId",
	"productName":"ProductName",
	"customerId":"CustomerId",
	"customerName":"name",
	"invoicePrice":"InvoicePrice",
	"quantity":"Quantity",
	"grossMargin":"GrossMargin",
	"costs":"OtherCOGS",
	"pricingDate":"PricingDate",
	"pricingDateYear":"PricingDateYear",
	"productDimensions":[
	],
	"customerDimensions":[
	],
	"continent":"Region",
	"country":"Country",
	"region":"City",
	"localListPrice":"LocalListPrice",
	"globalListPrice":"GlobalListPrice",
	"netPrice":"NetPrice",
	"breakdownMode":"Standard",
	"firstDayOfWeek":"Sunday"
	}

Used Company Parameters

Configuration Company Parameters

SIP_MapHierarchyConfig

This CP allows you to define which hierarchy levels are used in the dashboard. This can be useful when users do not have data for the Country level but they do for Continents. This CP table also controls which inputs will be available on the dashboard configurator.

The hierarchy of the configuration needs to be kept: World → Continent → Country → Region

So you cannot use Regions if you do not have data for Continents/Countries. Each lower hierarchy level needs to have all the higher levels enabled. This also means that in order to use the World level, you need to have the Continent data in the DM.

Path

Company Parameters > `SIP_MapHierarchyConfig`

Column name	Label	Is Used
Value	• World • Continent • Country • Region	Yes/No
Description	Describes which hierarchy level is being configured. These values should not be edited.	Enables or disables the given configurator entry.

Example

Hierarchy Level	**Label**	**Is Used**
World	World	Yes
Continent	Continent	Yes
Country	Country	Yes
Region	Region	No

SIP_MapCodeOverrides

This CP allows to map Datamart data to ISO codes, if it is not already in that form. This can be useful for users who do not store regional information in the ISO code format. Additionally this CP allows you to set up custom display labels for entries. If the ”User Display Label” is not set, the default label will be used. For example, it is possible to override the default label “United States of America” to “USA”.

⚠ Keep in mind that by default the Highmaps defined values of hierarchy level names are used. If any User Display Label is defined, all entries need to have the User Display Label defined.

Path

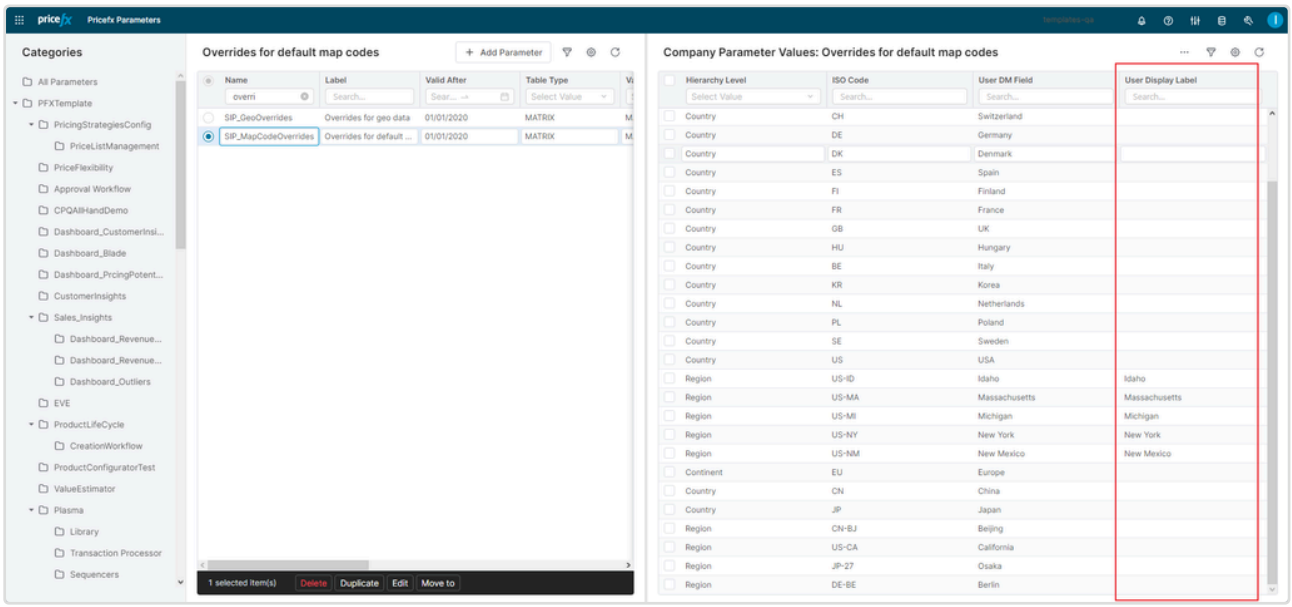
Company Parameters > `SIP_MapCodeOverrides`

Column name	Hierarchy Level	ISO Code	User DM Field	User Display Label
Value	• Continent • Country • Region	{ISO code of the entry on the selected hierarchy level} For regions use the ISO 3166-2 codes	{DM field representing the entry marked with ISO Code in user data}	{custom user label for the entry to be displayed on the chart}
Description	For example: Country	For example: US or US-NY	For example: USA	For example: USA

Example

Hierarchy Level	ISO Code	User DM Field	User Display Label
Continent	AS	Asia	
Continent	NA	America	
Continent	EU	Europe	
Country	DE	Germany	
Country	US	USA	

If you cannot see the name (region/country) in the data tab, they need to define the Hierarchy Level and User Display Label in the Company Parameters table.



SIP_GeoOverrides

This CP allows to move country entries between continents. This can be useful if e.g. users have data for a country in different continent data. For example, users use the EMEA business region which leads to Oman being included in the EU data, but since it is not on the map it cannot be displayed. Users can then set the GeoOverride for Oman to be displayed in the Asia data set.

The country ISO code needs to be in the set of ISO codes for the given continent in order to be properly displayed on the continent level.

⚠ GeoOverrides work only on the country level: only countries can be moved between continents. Regions cannot be moved.

If a country is moved to a continent it does not belong to, its data will be displayed on a the world level but not on the continent level.

Path

Company Parameters > `SIP_GeoOverrides`

Column name	ISO Code	Parent ISO Code	Override ISO Code
Value	{ISO code of country to be moved}	{ISO code of the continent entry for the given country}	{ISO code of the continent for the country to be moved to}
Description	For example: OM	For example: EU For the case described above, there would also need to be EMEA → EU mapping done in `SIP_MapCodeOverrides`.	For example: AS

Data Company Parameters

SIP_Population

Path

Company Parameters > `SIP_Population`

Column name	Continent	Country	Region	Sector	Population
Values	{2 letter ISO code of a continent}	{2 letter ISO code of a country}	{ISO code of a region}	{Code of a sector}	{given entry population}
Description			The default value is "*" (= none region specified for a given continent/country combination). Each region needs its own population specified in order to work properly. For regions use the ISO 3166-2 codes.	The default value is “*” (= none sector specified for given continent/country/region combination) Note: Currently no Region maps are supported as stated at the Supported Maps page, the support will be added on demand. This field is	

				prepared for future use.	

Example

Continent	Country	Region	Sector	Population
NA	CA	*	*	37,279,811
NA	US	*	*	329,093,110

Data Requirements and Deployment

Before deploying this package, it is possible to modify some parameters of this dashboard to adapt to an existing Datamart. The following fields are used for the setup:

Field Name	Description	Required	Note
Datamart	Datamart used in the analysis	Yes	
Product Id	Product field in the transactional data	Yes	
Customer Id	Customer field in the transactional data	No	
Invoice Price	Field representing revenue in the transactional data	Yes	
Gross Margin	Field representing margin in the transactional data	Yes	
Pricing Date	Field representing date of the transaction in the transactional data	Yes	
Quantity	Field representing quantity in the transactional data	Yes	
Continent	Field representing continent in the transactional data	Yes	Required to display the world map.
Country	Field representing country in the transactional data	No	Required to display the country map on a given continent.
Region	Field representing region in the transactional data	No	Required to display the region map on a given country.

For more details see Mandatory Data (Sales Insights).

See Also

Regional Revenue and Margin Dashboard (Business User Reference)

Outliers Dashboard - Configuration Details

Calculation Models

The current implementation provides three calculation models. These models differ in the way how items are distributed to buckets.

Buckets

There are always 4 buckets:

- High
- Medium
- Low
- Negative

The threshold calculations assign each item to a proper bucket based on the selected KPI value. The following rules apply for all models when placing an item into one of these 4 buckets. Each item whose running total KPI value is:

Value	Bucket
Negative	Negative bucket
Below the Low threshold	Low bucket
Above the High threshold	High bucket
In neither of previous buckets	Medium bucket

The manipulation happens automatically: the value is calculated, each item is put into a bucket based on the selected calculation model. The only control the user has over the buckets are the Company Parameters thresholds where to put what. The "value of the bucket" (which is hidden from the user, but is used for display purposes) is calculated as "the average number of all items present plus the number of items assigned to a given bucket". This ensures that the biggest slice will always be the one with the highest number of items inside.

Models

(Max - Min) Split Model

Allowed KPI Values

Value	Description
Revenue	(selected by default)
Revenue Contribution %	
Margin	
Margin %	
Margin Contribution %	

Thresholds Calculation Formulas

Threshold	Formula
High	MAX(KPI) - ((MAX(KPI) - MIN(KPI)) / 3)

Low	MIN(KPI) + ((MAX(KPI) - MIN(KPI)) / 3)

Split Equally Model

Allowed KPI Values

Value	Description
Revenue	(selected by default)
Margin	

This model uses the running total for bucket assignment. All items are sorted descending depending on the selected KPI. A running total is calculated along with each item assignment.

Thresholds Calculation Formulas

Threshold	Formula
High	SUM(KPI) / 3
Low	SUM(KPI) / 3 * 2

Contribution Model

Allowed KPI Values

Value	Description
Revenue Contribution %	(selected by default)
Margin Contribution %	

This model also uses the running total for bucket assignment. Again, all items are sorted descending depending on the selected KPI. A running total is calculated along with each item assignment. Thresholds are fetched from the Company Parameters.

Default Filters

There are some default filters applied on various fields to ensure proper calculations. These are:

- Only entries with **not null grossMargin** are considered.
- Only entries with **not null invoicePrice** are considered.
- Only entries with **not null quantity** are considered.
- Only entries with **SUM(invoicePrice) > 0** are considered.
- Only entries with **SUM(quantity) > 0** are considered.

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `productName`
- `customerId` (optional)
- `customerName` (optional)
- `grossMargin`
- `quantity`
- `invoicePrice`
- `productDimensions`
- `customerDimensions` (optional)

Example

Name	Value

`SIP_AdvancedConfiguration`	{
	"datamartName":"Standard_Sales_Data",
	"productId":"ProductId",
	"productName":"ProductName",
	"customerId":"CustomerId",
	"customerName":"name",
	"invoicePrice":"InvoicePrice",
	"quantity":"Quantity",
	"grossMargin":"GrossMargin",
	"costs":"OtherCOGS",
	"pricingDate":"PricingDate",
	"pricingDateYear":"PricingDateYear",
	"productDimensions":[
	
	],
	"customerDimensions":[
	
	],
	"continent":"Region",
	"country":"Country",
	"region":"City",
	"localListPrice":"LocalListPrice",
	"globalListPrice":"GlobalListPrice",
	"netPrice":"NetPrice",
	"breakdownMode":"Standard",
	"firstDayOfWeek":"Sunday"
	}

Used Company Parameters

Determines which threshold for the calculation to define.

Path

Company Parameters > `OutliersContributionModelThresholds`

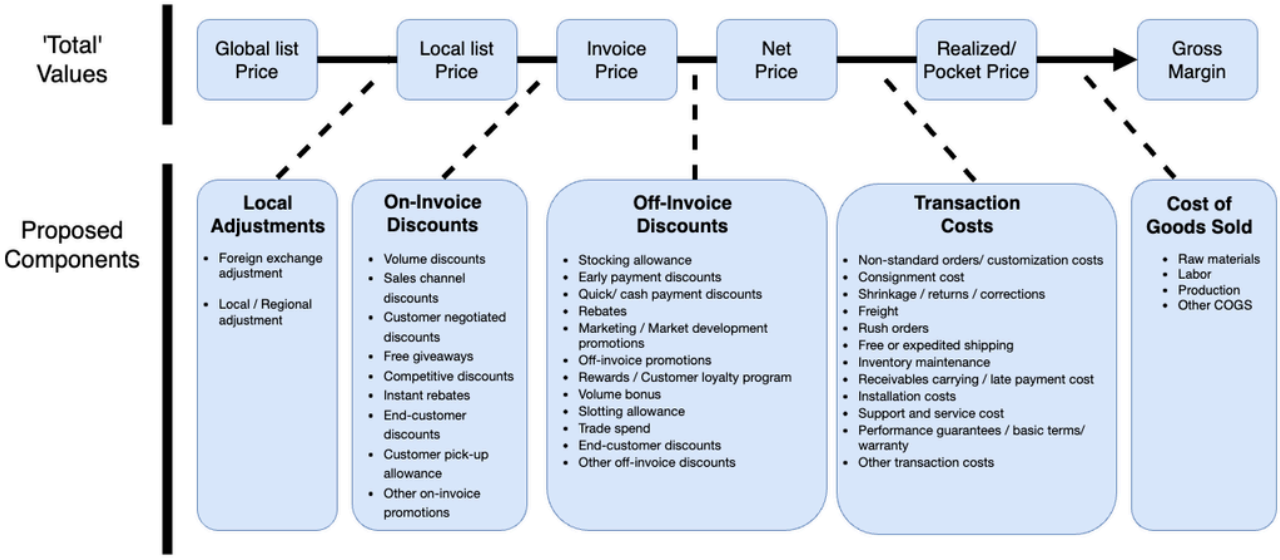
Name	Value
High	{Percentage value}
Low	{Percentage value}

See Also

Outliers Dashboard (Business User Reference)

Waterfall Dashboard - Configuration Details

Fields Definition



Total Value	Component	Description
Local adjustments	**Foreign exchange adjustment**	Adjustments due to exchange/currency issues
	Local/Regional adjustments	Adjustments for local costs (e.g. tariffs), regional customer preferences and market competitiveness
Volume discounts	**Volume discounts**	Discounts for bulk purchases
	Sales channel discounts	Discounts for a specific sales channel
	Seasonal discounts	Discounts for seasonal sales objectives (e.g. reduce inventory)
	Customer negotiated discounts	Customized discounts negotiated with the customer
	Free giveaways	Free services or products given to customer with a purchase and shown on the invoice
	Competitive discounts	Discretionary discounts negotiated before the order is taken based on competitors' prices
	Instant rebates	Rebates given before the invoice price
	End-customer discounts	Discounts for end-customer rather than retailer or distributor (typically large end-customers)
	Customer pick-up allowance	Allowance paid for customers who pick up the goods by themselves

	Other on-invoice promotions	Others
Stocking allowance	**Stocking allowance**	Discounts paid to wholesalers/retailers to make large purchases into inventory (often before seasonal demand increase)
	Early payment discounts	Negotiated discounts or deduction from the invoice if the payment is made early
	Quick/cash payment discounts	Deduction from the invoice price if payment is made quickly
	Rebates	Refunds given for purchasing at certain times, early orders or for selling a product to a specific customer
	Marketing/Market development promotions	Allowance paid to support advertising of manufacturer's brand or to promote sales in a specific market segment or during a promotional time period
	Rewards/Customer loyalty program	Redeem points for gifts or receive one-time promotions for those in loyalty programs; long-term agreements
	Volume bonus	End-of-year bonus paid to customers if the preset purchase volume targets are met
	Slotting allowance	Allowance paid to retailer to secure the set amount of shelf space and product positioning
	Trade spend	Allowance for retailer to discounts from MSRP (manufacturer's suggested retail price)
	End-customer discounts	Discounts for end-customer rather than retailer or distributor, types of pass-through
	Other off invoice discounts	Others
Non-standard orders / customization costs	**Non-standard orders / customization costs**	Costs associated with manufacturing and delivering a non-standard or customized order
	Consignment cost	Cost of funds when the supplier provides consigned inventory to a retailer or wholesaler
	Shrinkage / returns / corrections	Cost of defective or damaged products
	Freight	Cost of transporting goods to customer
	Rush orders	Higher costs associated with filing and transporting orders more quickly
	Free or expedited shipping	Higher costs of transporting goods to a specific customer
	Inventory maintenance	Cost to hold goods in inventory
	Receivables carrying / late payment cost	Cost of funds from the moment the invoice is sent until the payment is received; cost of

		delayed payments
	Installation costs	Cost of installing products, including transportation and labor costs
	Support and service cost	Cost of maintenance, general customer services, dedicated services, additional support, etc.
	Performance guarantees / basic terms/ warranty	Discounts that seller agrees to give buyers if the seller misses performance targets (e.g. quality levels, delivery times, price protects)
	Other transaction costs	Others
Raw materials	**Raw materials**	Cost of materials used to manufacture the product
	Labor	Wages for employees directly involved in manufacturing the product
	Production	Cost to manufacture the product
	Other COGS	Others

Field Calculation

Each field value defined in the Advanced Configuration waterfall-configuration is retrieved by querying its SUM from the Datamart. The exceptions are fields marked as `isSum` – these are calculated based on previous field values.

Used Advanced Configuration Fields

Path

Administration > Configuration > System Configuration > Advanced Configuration Options

Example

Name	Value

`waterfall-configuration`	{
	"waterfall-configuration": {
	"dataMart": "Standard_Sales_Data",
	"fields": [
	{
	"name": "GlobalListPrice",
	"label": "Global List Price",
	"isSum": false,
	"isPercentBase": true,
	"disabled": false,
	"isSubtract": false
	},
	{
	"name": "LocalAdjustments",
	"label": "Local Adjustments",
	"isSum": false,
	"isPercentBase": false,
	"disabled": false,
	"isSubtract": false,
	"subLevel": [
	{
	"name": "ForeignExchangeAdjustment",
	"label": "Foreign Exchange Adjustment",
	"disabled": false,
	"isSubtract": true
	},
	{
	"name": "LocalAdjustment",
	"label": "Local Adjustment",
	"disabled": false,
	"isSubtract": true
	}
	]
	},
	{
	"name": **null**,
	"label": "Local List Price",
	"isSum": true,
	"isPercentBase": false,
	"disabled": false,
	"isSubtract": false
	},
	{
	"name": **null**,
	"label": "On-Invoice Discounts",
	"isSum": false,

```
        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false,
        "subLevel": [
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            "name": "VolumeDiscounts",
            "label": "Volume Discounts",
            "disabled": false,
            "isSubtract": true
          },
          {
            "name": "SalesChannelDiscounts",
            "label": "Sales Channel Discounts",
            "disabled": false,
            "isSubtract": true
          },
          {
            "name": "SeasonalDiscounts",
            "label": "Seasonal Discounts",
            "disabled": false,
            "isSubtract": true
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            "name": "CustomerNegotiatedDiscounts",
            "label": "Customer Negotiated Discounts",
            "disabled": false,
            "isSubtract": true
          },
          {
            "name": "FreeGiveaways",
            "label": "Free Giveaways",
            "disabled": false,
            "isSubtract": true
          },
          {
            "name": "CompetitiveDiscounts",
            "label": "Competitive Discounts",
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            "isSubtract": true
          },
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            "isSubtract": true
          },
          {
            "name": "EndCustomerOnInvoiceDiscounts",
            "label": "End Customer OnInvoice Discounts",
            "disabled": false,
            "isSubtract": true
          },
          {
            "name": "CustomerPickupAllowance",
            "label": "Customer Pickup Allowance",
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            "isSubtract": true
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          {
            "name": "OtherOnInvoicePromotions",
```

```
            "label": "Other OnInvoice Promotions",
            "disabled": false,
            "isSubtract": true
          }
        ]
      },
      {
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        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false,
        "subLevel": [
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            "name": "UpchargeFreight",
            "label": "Upcharge Freight",
            "disabled": false,
            "isSubtract": false
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          {
            "name": "UpchargeCustomisation",
            "label": "Upcharge Customisation",
            "disabled": false,
            "isSubtract": false
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            "name": "UpchargeInstallation",
            "label": "Upcharge Installation",
            "disabled": false,
            "isSubtract": false
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        ]
      },
      {
        "name": null,
        "label": "Invoice Price",
        "isSum": true,
        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false
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      {
        "name": null,
        "label": "Off-Invoice Discounts",
        "isSum": false,
        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false,
        "subLevel": [
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            "isSubtract": true
          },
          {
            "name": "EarlyPaymentDiscounts",
            "label": "Early Payment Discounts",
            "disabled": false,
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            "isSubtract": true
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            "name": "QuickPaymentDiscounts",
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            "label": "Trade Spend",
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            "isSubtract": true
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            "disabled": false,
```

```
            "isSubtract": true
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        ]
      },
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        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false
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        "label": "Transaction Costs",
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        "disabled": false,
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            "label": "Customization Costs",
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            "name": "ConsignmentCost",
            "label": "Consignment Cost",
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          {
            "name": "Corrections",
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            "label": "Freight",
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            "isSubtract": true
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            "name": "RushOrders",
            "label": "Rush Orders",
            "disabled": false,
            "isSubtract": true
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          {
            "name": "ExpeditedShipping",
            "label": "Expedited Shipping",
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            "isSubtract": true
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            "label": "Inventory Maintenance",
            "disabled": false,
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          },
          {
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            "name": "SupportCost",
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            "disabled": false,
            "isSubtract": true
          },
          {
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            "disabled": false,
            "isSubtract": true
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      {
        "name": null,
        "label": "Realized Price",
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        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false
      },
      {
        "name": null,
        "label": "Cost Of Goods Sold",
        "isSum": false,
        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false,
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            "isSubtract": true
          },
          {
            "name": "Labor",
            "label": "Labor",
            "disabled": false,
```

```
            "isSubtract": true
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          {
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            "disabled": false,
            "isSubtract": true
          },
          {
            "name": "OtherCOGS",
            "label": "Other COGS",
            "disabled": false,
            "isSubtract": true
          }
        ]
      },
      {
        "name": null,
        "label": "Gross Margin",
        "isSum": true,
        "isPercentBase": false,
        "disabled": false,
        "isSubtract": false
      }
    ]
  }
}
```

For additional information about the configuration, see Waterfall Dashboard Configuration during Deployment.

Advanced Configuration

Name	Value	Description
`name`	{name of the field from transactions DM}	Defines which transaction DM fields will be displayed in the waterfall dashboard. The names have to match exactly those from the DM.
`label`	{custom label for the field to be displayed on the dashboard}	Allows the user to set up a custom displayed value. For example: `DM field Sales_Value_5` can be renamed to `InvoicePrice`.
`isSum`	{true/false}	Determines whether a given element should display the total sum across the entire series. Defaults to false. ⚠ The first entry is marked as `isSum` = `false`. ⚠ The last entry is marked as `isSum` = `true`.
`isPercentBase`	{true/false}	Defines the base for percentage calculations. Only the first field marked with `true` will be taken into account. Defaults to false.
`disabled`	{true/false}	Determines whether a given field should no longer be displayed. Defaults to false.
`isSubtract`	{true/false}	Determines whether the value of the given field should be reversed. Defaults to false. ⚠ The values defined as `isSubtract` have their value multiplied by -1.
`subLevel`	{list of elements that are used for drilldown under this field}	Defines the drilldown structure for a given field. The field definition follows the same structure as the parent element (without the `isPercentBase` column)

ℹ Field with both `isSum` and `isSubtract` set as `false` or left empty will display as a gain. Gains are displayed in green in the dashboard, losses in red.

See Also

Waterfall Dashboard (Business User Reference)

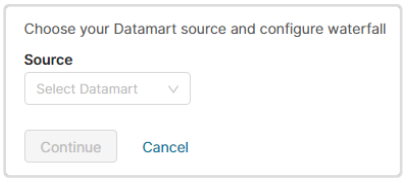
Waterfall Dashboard Configuration during Deployment

When installing the Sales Insight Accelerator from PlatformManager Marketplace, these are the specifics for the Waterfall dashboard.

- Datamart Selection
- Preloaded Template
- Waterfall Definition Glossary
- Form Controls
- Configuration Deployment

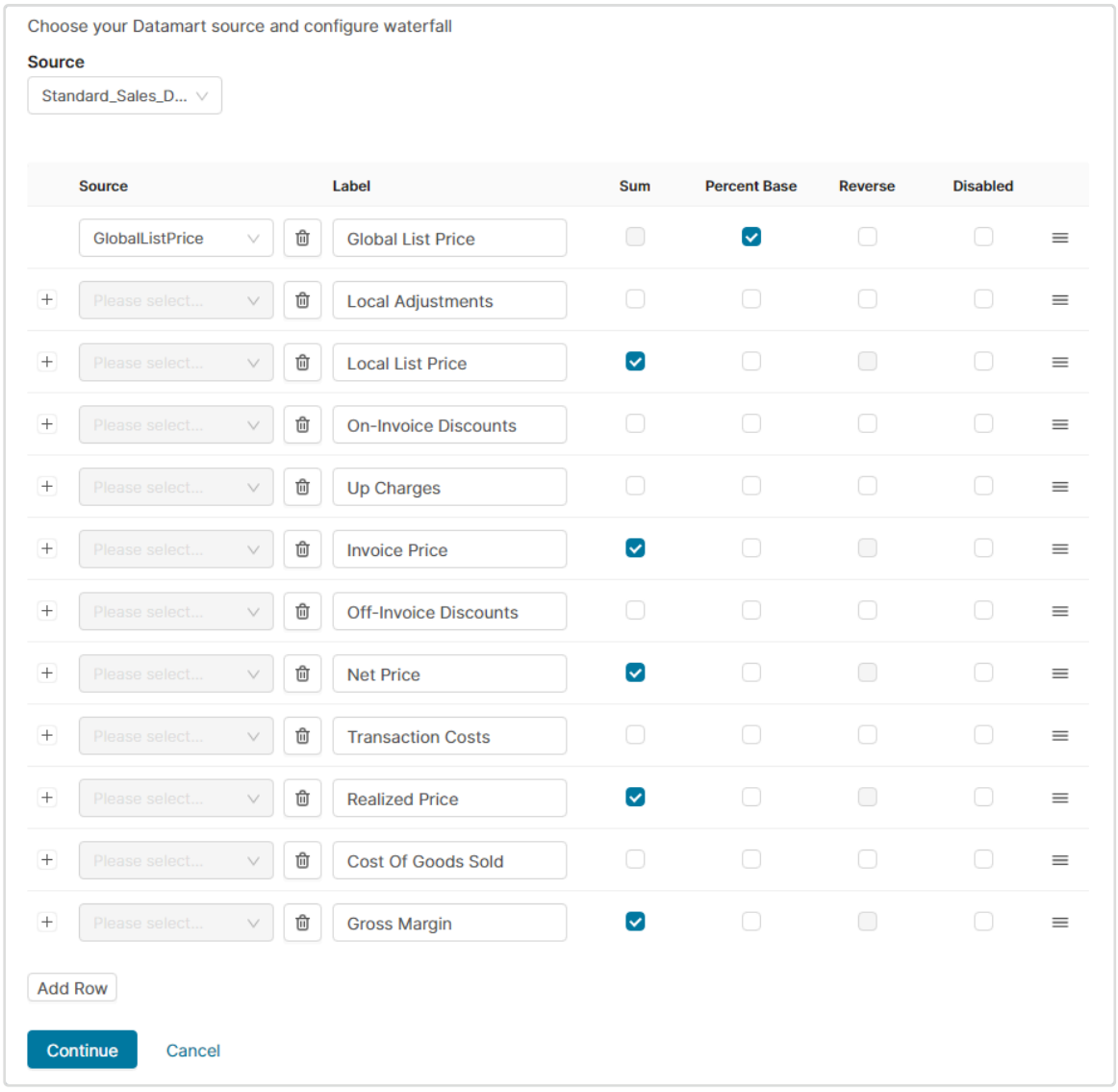
Datamart Selection

The initial step to start the waterfall configuration is selection of the source Datamart from which data will be fetched. Sales Insights Accelerator uses its own Datamart called `Standard_Sales_Data`.



Preloaded Template

If the `Standard_Sales_Data` Datamart is selected, you will be presented with a predefined structure that can be used as a guide for further steps.



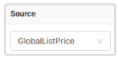
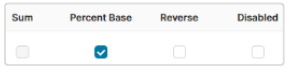
Any fields that are not defined in the selected Datamart will be automatically removed from the predefined template.

If configuration of the waterfall step is already present on the partition, it will be loaded instead of the the default template.

Waterfall Definition Glossary

Definition	Description
Source	Field from Datamart used to retrieve a value for a given waterfall field.
Label	Allows to define a custom label to the field that is going to be displayed on the chart.
Sum	Defines the field as a sum, i.e. the value of this field will be calculated by summation of all previous fields. The first field cannot be a sum, the last one however must be.
Percent Base	Marks the given field as a percentage base for percentage model calculations. There can be only one percentage base field.
Reverse	Allows to reverse the value of a given field. Useful for creating subtractions if the data is stored in positive values. ⚠ For elements with a sub-level, the fields in the sub-level are used for calculation and they should be reversed, not the parent field.
Disabled	Marks the field as disabled. Disabled fields are not shown on the dashboard.

Form Controls

Control	Display in UI	Description
Source selection		Used to select Datamart fields.
Remove button		Allows you to remove the waterfall field definition.
Radio buttons		Allow you to select appropriate field parameters. Keep in mind they have conditions (for example only one radio button with Percent Base can be selected).
Move button		Allows you to move fields up and down. You need to click and hold it for 1 or 2 seconds before the move can happen.
Add sub-level		Allows you to add sub-level fields for the drill-down functionality. Keep in mind that fields with sub-levels (parents) cannot have Datamart representations, but the sub-level fields can (children).
Add row		Allows you to add a new waterfall field.

Configuration Deployment

After the setup, the configuration will be deployed to the partition in the **Advanced Configuration** section under the name `waterfall-configuration` (example).

Waterfall Comparison Dashboard - Configuration Details

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `customerId` (optional)
- `quantity`

Example

Name	Value

`SIP_AdvancedConfiguration`	{
	"datamartName":"Standard_Sales_Data",
	"productId":"ProductId",
	"customerId":"CustomerId",
	"quantity":"Quantity",
	"pricingDate":"PricingDate"
	}

See Also

Waterfall Comparison Dashboard (Business User Reference)

Revenue Breakdown Dashboard - Configuration Details

Fields Definition

In the tables below the following terminology is used (field definitions taken from SIP_AdvancedConfiguration):

Field	Description
T1	Prior period
T2	Final period

Column Definition

The following columns are available on the dashboard:

Column	Description
Comparison revenue in [Quarter-Year] (1)	Total invoice price of comparison period (T1)
Revenue in {T1}	Provides a revenue summary from the first period.
Volume Effect	Difference in revenue between T1 and T2 is attributed to a difference in volume only (the impact of changes in volume). Total change in volume multiplied by the difference of the inter-period weighted average price and cost. This can be positive or negative.
Price Effect	Difference in revenue between the T1 and T2 that can be attributed solely to changes in price (the impact of changes in specific prices). The average volume multiplied by the weighted average change in prices where the weighting uses the average volume weighting across the two periods. The result can be negative or positive.
Portfolio Mix Effect	Difference in revenue between T2 and T1 for transactions involving customers that appear in both T1 and T2. These transactions are also included in the Price Effect and Volume Effect calculations, ensuring consistency across all three categories. Mix captures the impact of changes in the product portfolio composition and is defined by the average volume and the sum of the differences in individual products' average prices across the two periods, multiplied by their change in portfolio mix contribution between the two periods.
New Business	Total revenue from transactions in T2 from customers that did not buy anything in the T1, expressed as a positive number. Always positive.
Lost Business	Total revenue from transactions in T1 from customers that did not buy anything in the T2, expressed as a negative number. Always negative.
Other Effects	Other effects that may influence the revenue that are none of the above.
Revenue in {T2}	Provides a summary of revenue from the second period.

Field Calculation

Effects are calculated in the following way:

Effect	Calculation
Volume	SUM(T2.Volume - T1.Volume) * SUM((T2.Mix * T2.InvoicePricePerUnit + T1.Mix * T1.InvoicePricePerUnit) / 2)
Price	SUM((T2.Volume + T1.Volume) / 2) * SUM((T2.Mix + T1.Mix) / 2 * (T2.InvoicePerUnit - T1.InvoicePerUnit)
Portfolio Mix	SUM((T2.Volume + T1.Volume) / 2) * SUM((T2.Mix - T1.Mix) * (T2.InvoicePerUnit + T1.InvoicePricePerUnit) / 2)
Lost Business	SUM(Invoice price of products traded in T1 but not traded in T2)
New Business	SUM(Invoice price of products traded in T2 but not traded in T1)
Other	T2.InvoicePrice - (T1.InvoicePrice + lostBusinessEffect + priceEffect + volumeEffect + mixEffect + newBusinessEffect)

Mix Definition

Field	Formula
The ratio of volume for the particular product in the scope of all products volume within the period	Volume per product / Volume per all products
T1.Mix	T1.Mix = Volume per product in T1 / volume per all products in T1
T2.Mix	T2.Mix = Volume per product in T2 / volume per all products in T2

With the 1.7.0 version, the effects calculation formulas has been changed to address the business point of view more adequatelly. The previous formulas are referred to as "Legacy" while the new ones are referred to as "Standard" (default) in configuration.

For the "Legacy" formulas you can refer to the archived documentation of the previous versions - the latest of these: Accelerate_Sales_Insights_Package-1.6.1.pdf (*Revenue Breakdown Dashboard - Fields Definition* chapter).

To switch between these two (if needed) follow the configuration guide in the Installation (SIP) page: Installation (Sales Insights) Revenue/Margin Breakdowns Definition.

Default Filters

There are some default filters applied on various fields to ensure proper calculations. These are:

- Only entries with **not null invoicePrice** are considered.
- Only entries with invoicePrice **not equal to 0** are considered.
- Only entries with **not null quantity** are considered.
- Only entry sets with **SUM(quantity) > 0** are considered (aggregation "having" filter is applied).
- Only entry sets with **SUM(invoicePrice) > 0** are considered (aggregation "having" filter is applied).

Some of the definitions on this page were taken from the web article Normative decomposition of the profit bridge into the impact of changes in marketing variables.

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `customerId` (optional)
- `quantity`
- `invoicePrice`
- `productDimensions`
- `customerDimensions` (optional)
- `breakdownMode`

Example

Name	Value

`SIP_AdvancedConfiguration`	{
	"datamartName":"Standard_Sales_Data",
	"productId":"ProductId",
	"productName":"ProductName",
	"customerId":"CustomerId",
	"customerName":"name",
	"invoicePrice":"InvoicePrice",
	"quantity":"Quantity",
	"grossMargin":"GrossMargin",
	"costs":"OtherCOGS",
	"pricingDate":"PricingDate",
	"pricingDateYear":"PricingDateYear",
	"productDimensions":[
	],
	"customerDimensions":[
	],
	"continent":"Region",
	"country":"Country",
	"region":"City",
	"localListPrice":"LocalListPrice",
	"globalListPrice":"GlobalListPrice",
	"netPrice":"NetPrice",
	"breakdownMode":"Standard",
	"firstDayOfWeek":"Sunday"
	}

See Also

Revenue Breakdown Dashboard (Business User Reference)

Margin Breakdown Dashboard - Configuration Details

Fields Definition

In the tables below the following terminology is used (field definitions taken from SIP_AdvancedConfiguration):

Field	Description
T1	First period data
T2	Second period data
Margin	SUM(grossMargin)
Volume	SUM(quantity)
InvoicePricePerUnit	SUM(invoicePrice) / SUM(quantity)
MarginPerUnit	SUM(grossMargin) / SUM(quantity)
CostPerUnit	SUM(InvoicePrice - GrossMargin) / SUM(quantity) "Cost" for the purpose of this dashboard is defined as the gap between Revenues and Gross Margin; it would be cumbersome to declare another column or parameter summing up all "waterfall cost components".
T1Volume	Total Volume for T1
T2Volume	Total Volume for T2

Column Definition

The following columns are available on the dashboard:

Column	Description
Margin in { T1 }	Provides a margin summary from the first period.
Volume Effect	Difference in margin between T1 and T2 is attributed to a difference in volume only (the impact of changes in volume). Total change in volume multiplied by the difference of the inter-period weighted average margin. This can be positive or negative.
Price Effect	Difference in margin between the T2 and T1 that can be attributed solely to changes in price (the impact of changes in specific prices). The average volume multiplied by the weighted average change in prices where the weighting uses the average quantity weighting across the two periods. The result can be negative or positive.
Portfolio Mix Effect	Difference in margin between T2 and T1 for transactions for customers that appear in both T1 and T2 but are not yet included in the Price Effect nor Volume Effect categories (impact of changes in the product portfolio mix). It is defined by the average volume and the sum of the differences in individual products of their average price and cost across the two periods multiplied by their change in portfolio mix contribution between the two periods.
New Business	Total margin from transactions in T2 from customers that did not buy anything in the T1, expressed as a positive number. Always positive.
Lost Business	Total margin from transactions in T1 from customers that did not buy anything in the T2, expressed as a negative number. Always negative.
Cost Effect	Difference in margin between T1 and T2 is attributed to a difference in cost only (the impact of changes in specific costs). The average volume multiplied by weighted average change in costs where the weighting uses the average quantity weighting across the two periods.
Other Effects	This value should always be zero. If it is not, the relationship "Invoice - Cost = Gross Margin" is not fulfilled. Hence this component does not need a bar to be represented.
Margin in { T2 }	Provides a margin summary from the second period.

Field Calculation

Effects are calculated in the following way:

Effects	Formula
Volume	SUM(T2.Volume - T1.Volume) * SUM((T2.Mix * T2.MarginPerUnit + T1.Mix * T1.MarginPerUnit) / 2)
Price	SUM(T2.Volume + T1.Volume) / 2) * SUM((T2.Mix + T1.Mix) / 2 * (T2.InvoicePerUnit - T1.InvoicePerUnit)
Portfolio Mix	SUM((T2.Volume + T1.Volume) / 2) * SUM((T2.Mix - T1.Mix) * (T2.MarginPerUnit + T1.MarginPerUnit) / 2)
Cost	SUM(T2.Volume + T1.Volume) / 2) * SUM((T2.Mix + T1.Mix) / 2 * (T2.CostPerUnit - T1.CostPerUnit)))

Mix Definition

Field	Formula
Quantity ratio for the particular product in the scope of all products quantity within the period	Quantity per product / Quantity per all products
T1.Mix	T1.Volume/T1Volume
T2.Mix	T2.Volume/T2Volume

With the 1.7.0 version, the effects calculation formulas have been changed to address the business point of view more adequately. The previous formulas are referred to as "Legacy", while the new ones are referred to as "Standard" (default) in the configuration.

For more information on the Legacy formulas see the archived documentation of the previous versions (*Margin Breakdown Dashboard - Fields Definition* chapter).

To switch between these two (if needed), follow the configuration guide in the Installation (Sales Insights) page.

Default Filters

There are some default filters applied on various fields to ensure proper calculations. These are:

- Only entries with **not null grossMargin** are considered.
- Only entries with **not null invoicePrice** are considered.
- Only entries with **not null quantity** are considered.
- Only entry sets with **SUM(quantity) > 0** are considered (aggregation "having" filter is applied).

Some of the definitions on this page were taken from the web article Normative decomposition of the profit bridge into the impact of changes in marketing variables.

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `customerId` (optional)
- `grossMargin`
- `quantity`
- `invoicePrice`
- `costs`
- `productDimensions`
- `customerDimensions` (optional)
- `breakdownMode`

Example

Name	Value

`SIP_AdvancedConfiguration`	{
	"datamartName":"Standard_Sales_Data",
	"productId":"ProductId",
	"productName":"ProductName",
	"customerId":"CustomerId",
	"customerName":"name",
	"invoicePrice":"InvoicePrice",
	"quantity":"Quantity",
	"grossMargin":"GrossMargin",
	"costs":"OtherCOGS",
	"pricingDate":"PricingDate",
	"pricingDateYear":"PricingDateYear",
	"productDimensions":[
	],
	"customerDimensions":[
	],
	"continent":"Region",
	"country":"Country",
	"region":"City",
	"localListPrice":"LocalListPrice",
	"globalListPrice":"GlobalListPrice",
	"netPrice":"NetPrice",
	"breakdownMode":"Standard",
	"firstDayOfWeek":"Sunday"
	}

See Also

Margin Breakdown Dashboard (Business User Reference)

Causality Dashboard - Configuration Details

Fields Definition

The following abbreviations are used for the field definitions (field definitions taken from SIP_AdvancedConfiguration):

Field	Description
T1	First period data
T2	Second period data

Column Definition

The following columns are available on the dashboard:

Column	Description
Revenue/Margin in {T1}	Provides a revenue/margin summary from the first period.
User selected product aggregation | User selected customer aggregation	Total revenue/margin of a given product/customer group.
Other effects (number of entries)	Total revenue/margin contribution of all the other groups that are not displayed in the top X groups.
New/Lost Business	Total contribution of entries that are not in the common business for given periods.
Revenue/Margin in {T2}	Provides a revenue/margin summary from the second period.

Field Calculation

Field	Formula
Revenue/Margin in {T1}/{T2}	SUM(invoicePrice)/SUM(grossMargin)
Product/Customer group entries	SELECT {productIdField}, {customerIdField}, SUM(T2.{measure} - T1.{measure}) AS 'Delta' FROM T2 INNER JOIN T1 ON {joinFields} {groupBy} ORDER BY SUM(T2.{measure} - T1.{measure}) {orderStyle}
New/Lost Business	T2 - T1 - {top elements measure summed up} - {common business}
Common business	All entries - Top entries summed up

Default Filters

There are some default filters applied on various fields to ensure proper calculations. These are:

- Only entries with **not null grossMargin** are considered.
- Only entries with **not null invoicePrice** are considered.
- Only entries with **SUM(invoicePrice) > 0** are considered.
- Only entries with **SUM(grossMargin) > 0** are considered.

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `customerId` (optional)
- `invoicePrice`
- `grossMargin`
- `productDimensions`
- `customerDimensions` (optional)

Example

Name	Value

`SIP_AdvancedConfiguration`	{
	"datamartName":"Standard_Sales_Data",
	"productId":"ProductId",
	"productName":"ProductName",
	"customerId":"CustomerId",
	"customerName":"name",
	"invoicePrice":"InvoicePrice",
	"quantity":"Quantity",
	"grossMargin":"GrossMargin",
	"costs":"OtherCOGS",
	"pricingDate":"PricingDate",
	"pricingDateYear":"PricingDateYear",
	"productDimensions":[
	],
	"customerDimensions":[
	],
	"continent":"Region",
	"country":"Country",
	"region":"City",
	"localListPrice":"LocalListPrice",
	"globalListPrice":"GlobalListPrice",
	"netPrice":"NetPrice",
	"breakdownMode":"Standard",
	"firstDayOfWeek":"Sunday"
	}

See Also

Causality Dashboard (Business User Reference)

Period Over Period Dashboard - Configuration Details

Fields Definition

Ration Types

Ratio Types and formulas used (by default) to calculate the output measure.

Field	Formula
Gross Margin %	Gross Margin / Invoice Price
Price Leakage %	(Local List Price – Net Price) / Local List Price
Price Realization %	Invoice Price / Global List Price
Incentive %	Net Sales Column / Local List Price Column
Average Price Per Unit	Invoice Price / Quantity
Average Profit Per Unit	Gross Margin / Quantity
Custom	Input values are provided manually as numerator and denominator in the formula.

Actual Period

Field	Formula
Start	(Final Interval) – ((Number Of Intervals) * Interval Size)
End	Calendar unit defined by Final Interval.

Comparison Period

Field	Formula
Start	(Final Interval – Offset of Comparison Period) – ((Number Of Intervals) * Interval Size)
End	Calendar unit defined by (Final Interval – Offset of Comparison Period).

Used Advanced Configuration Fields

Path

Administration > **Configuration** > **System Configuration** > **Advanced Configuration Options**

List of Advanced Configuration Fields

- `datamartName`
- `pricingDate`
- `productId`
- `customerId`
- `grossMargin`
- `quantity`
- `invoicePrice`
- `firstDayOfWeek` – Defines the day which is considered a starting day of a week (typically Sunday or Monday).
- `localListPrice`
- `globalListPrice`
- `netPrice`
- `pricingDateDay` (optional)
- `pricingDateWeek` (optional)
- `pricingDateMonth` (optional)
- `pricingDateQuadWeek` (optional)
- `pricingDateQuarter` (optional)
- `pricingDateYear` (optional)

Example

Name	Value
`SIP_AdvancedConfiguration`	{ "datamartName":"Standard_Sales_Data", "productId":"ProductId", "productName":"ProductName", "customerId":"CustomerId", "customerName":"name", "invoicePrice":"InvoicePrice", "quantity":"Quantity", "grossMargin":"GrossMargin", "costs":"OtherCOGS", "pricingDate":"PricingDate", "pricingDateYear":"PricingDateYear", "productDimensions":[ ], "customerDimensions":[ ], "continent":"Region", "country":"Country", "region":"City", "localListPrice":"LocalListPrice",

```
  "globalListPrice":"GlobalListPrice",
  "netPrice":"NetPrice",
  "breakdownMode":"Standard",
  "firstDayOfWeek":"Sunday"
}
```

Increase Query Performance

Increase query performance by using configurable fields. When the query data Interval Size must be recalculated (CONCAT) for each result row (e.g. With Interval Size = Day, extracted the date 13/11/2023 into 2023-D312), there can be performance issues due to large data.

To avoid this issue, there are new fields that can be configured **optionally** during deployment via PlatformManager, such as:

- `pricingDateDay`
- `pricingDateWeek`
- `pricingDateMonth`
- `pricingDateQuadWeek`
- `pricingDateQuarter`
- `pricingDateYear`

These fields can be optionally mapped to the Datamart fields of the same names through the configuration `SIP_AdvancedConfiguration`.

As this configuration step is optional, it may happen that the fields do not exist in the Datamart or have not been mapped in `SIP_AdvancedConfiguration`. In such case, the old way (extracting pricingDate into the corresponding Interval Size for each result row) will be used.

See Also

Period Over Period Dashboard (Business User Reference)

Architecture Components (Sales Insights)

The Sales Insights Accelerator includes Sales Insights Dashboards, so all of their components are included here as well.

> For details see the architecture of Sales Insights Dashboards accelerator.

- Advanced Configuration Properties
- Company Parameters
- Product/Customer Master Configuration
- Data Source
- Datamart
- Dependencies

Advanced Configuration Properties

Name	Description	Value

`SIP_AdvancedConfiguration`	Configured by user during installation process.	Example Value
		{
		"datamartName": "Standard_Sales_Data",
		"productId": "ProductId",
		"productName": "ProductName",
		"productGroup": "ProductGroup",
		"customerId": "CustomerId",
		"customerName": "Name",
		"invoicePrice": "InvoicePrice",
		"quantity": "Quantity",
		"pricingDate": "PricingDate",
		"pricingDateYear": "PricingDateYear",
		"grossMargin": "GrossMargin",
		"continent": "Region",
		"country": "Country",
		"region": "City",
		"sector": "",
		"costs": "OtherCOGS",
		"productDimensions": [],
		"customerDimensions": [],
		"breakdownMode": "Standard",
		"firstDayOfWeek": "Sunday",
		"localListPrice": "LocalListPrice",
		"globalListPrice": "GlobalListPrice",
		"netPrice": "NetPrice"
		}

`WaterfallConfiguration`	Configured by user during installation process.	Example Value { "fields": [{ "name": "GlobalListPrice", "label": "Global List Price", "isSum": false, "isPercentBase": true,

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    "isSubtract": false
   },
   {
    "name": null,
    "isSum": false,
    "isPercentBase": false,
    "isSubtract": false,
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     {
      "name": "ForeignExchangeAdjustment",
      "label": "Foreign Exchange Adjustment",
      "disabled": false,
      "isSubtract": true
     },
     {
      "name": "LocalAdjustment",
      "label": "Local Adjustment",
      "disabled": false,
      "isSubtract": true
     }
    ],
    "label": "Local Adjustments"
   },
   {
    "name": null,
    "isSum": true,
    "isPercentBase": false,
    "isSubtract": false,
    "disabled": false,
    "label": "Local List Price"
   },
   {
    "name": null,
    "isSum": false,
    "isPercentBase": false,
    "isSubtract": false,
    "disabled": false,
    "subLevel": [
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      "name": "VolumeDiscounts",
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      "isSubtract": true
     },
     {
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      "label": "Seasonal Discounts",
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        "label": "Customer Negotiated Discounts",
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        "isSubtract": true
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      {
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        "label": "Free Giveaways",
        "disabled": false,
        "isSubtract": true
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      {
        "name": "CompetitiveDiscounts",
        "label": "Competitive Discounts",
        "disabled": false,
        "isSubtract": true
      },
      {
        "name": "InstantRebates",
        "label": "Instant Rebates",
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        "isSubtract": true
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      {
        "name": "EndCustomerOnInvoiceDiscounts",
        "label": "End Customer OnInvoice Discounts",
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        "isSubtract": true
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        "name": "CustomerPickupAllowance",
        "label": "Customer Pickup Allowance",
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        "isSubtract": true
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        "label": "Other OnInvoice Promotions",
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        "isSubtract": true
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        "isSubtract": true
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      "isSubtract": true
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      }
    ],
    "label": "Cost Of Goods Sold"
  },
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    "isPercentBase": false,
    "isSubtract": false,
    "disabled": false,
    "label": "Gross Margin"
```

```
368     }
369   ]
370 }
```

Company Parameters

Name	Label
PFXTemplate_DB_RevenueAndMargin	Configuration for Revenue and margin dashboard
OutliersContributionModelThresholds	Threshold configuration for Outliers contribution model
SIP_Population	Population of countries (data uploaded automatically during installation)
SIP_MapHierarchyConfig	Configuration for Regional Revenue and Margin Hierarchy
SIP_MapCodeOverrides	Overrides for default map codes
SIP_GeoOverrides	Overrides for geo data

For more details see:

- Revenue and Margin Dashboard - Used Company Parameters
- Regional Revenue and Margin Dashboard - Used Company Parameters
- Outliers Dashboard - Used Company Parameters

Product/Customer Master Configuration

During installation the administrator supplies the data and mapping to be uploaded.

Data Source

- **Product/Customer** – During installation:
  a. Fields definitions will be synced with the newly created fields of the master table Products/Customers.
  b. All string columns will be set as Dimension.
  c. Data will be loaded from the master table Products/Customers.
- **TXStandardData** – Created during the installation process.
- **ccy** – Created during the installation process.
- **uom** – Created during the installation process.
- **cal** – Created during the installation process.

Datamart

- **Standard_Sales_Data** – Created during the installation process.

Dependencies

This accelerator depends on the following accelerators which will be deployed during the installation too:

- Shared Library
- Dashboards Library

Dashboards Architecture Components (Sales Insights)

Advanced Configuration Options

Name	Description
SIP_AdvancedConfiguration	JSON with configuration settings in key-value format. Those settings are configured during the installation.
SIP_Commons_AdvancedConfiguration	JSON with configuration settings in key-value format.
WaterfallConfiguration	JSON with configuration of the waterfall.

Dashboards Components

Revenue and Margin

Component	Name
Logic	`Dashboard_RevenueAndMargin`
Dashboard	Revenue_Margin
Company Parameter	PFXTemplate_DB_RevenueAndMargin, including data

Revenue Breakdown

Component	Name
Logic	`Revenue_Breakdown`
Dashboard	Revenue_Breakdown

Margin Breakdown

Component	Name
Logic	`Dashboard_Margin_Breakdown`
Dashboard	Margin_Breakdown

Waterfall and Waterfall Comparison

Component	Name
Logic	• `Dashboard_Waterfall` • `Dashboard_ComparisonWaterfall` • `Configurator_ComparisonWaterfall`
Dashboard	• Waterfall • ComparisonWaterfall

Regional Revenue and Margin

Component	Name
Logic	• `Dashboard_RevenueAndMarginDistribution_Country` • `Configurator_RegionAndCountry`
Dashboard	RevenueAndMarginDistribution_DetailMap
Company Parameter	• SIP_MapHierarchyConfig, including data • SIP_MapCodeOverrides, including data

	• SIP_GeoOverrides

Product/Customer Causality

Component	Name
Logic	`Dashboard_Causality`
Dashboard	Causality_Dashboard

Outliers

Component	Name
Logic	• `Outliers_Dashboard` • `Configurator_Outliers`
Dashboard	Outliers_Dashboard
Company Parameter	OutliersContributionModelThresholds, including data

Company Parameters

- SIP_Population, including data
- `CurrencySymbols`, including data
- `SIP_DefaultFilterValues`

Configuration Wizard

Component	Name
Wizard	`SIPDefaultFilterManagementWizard`
Logic	• `SIP_DefaultFilterConfiguratorInput` • `SIP_DefaultFilterConfiguratorExecutor`

Logics Common for All Dashboards

- Library `SIP_Dashboards_Commons`

Preferences

Preferences contain configuration of layout for all dashboards.

Dependencies

This accelerator depends on the following accelerators which will be deployed during the installation too:

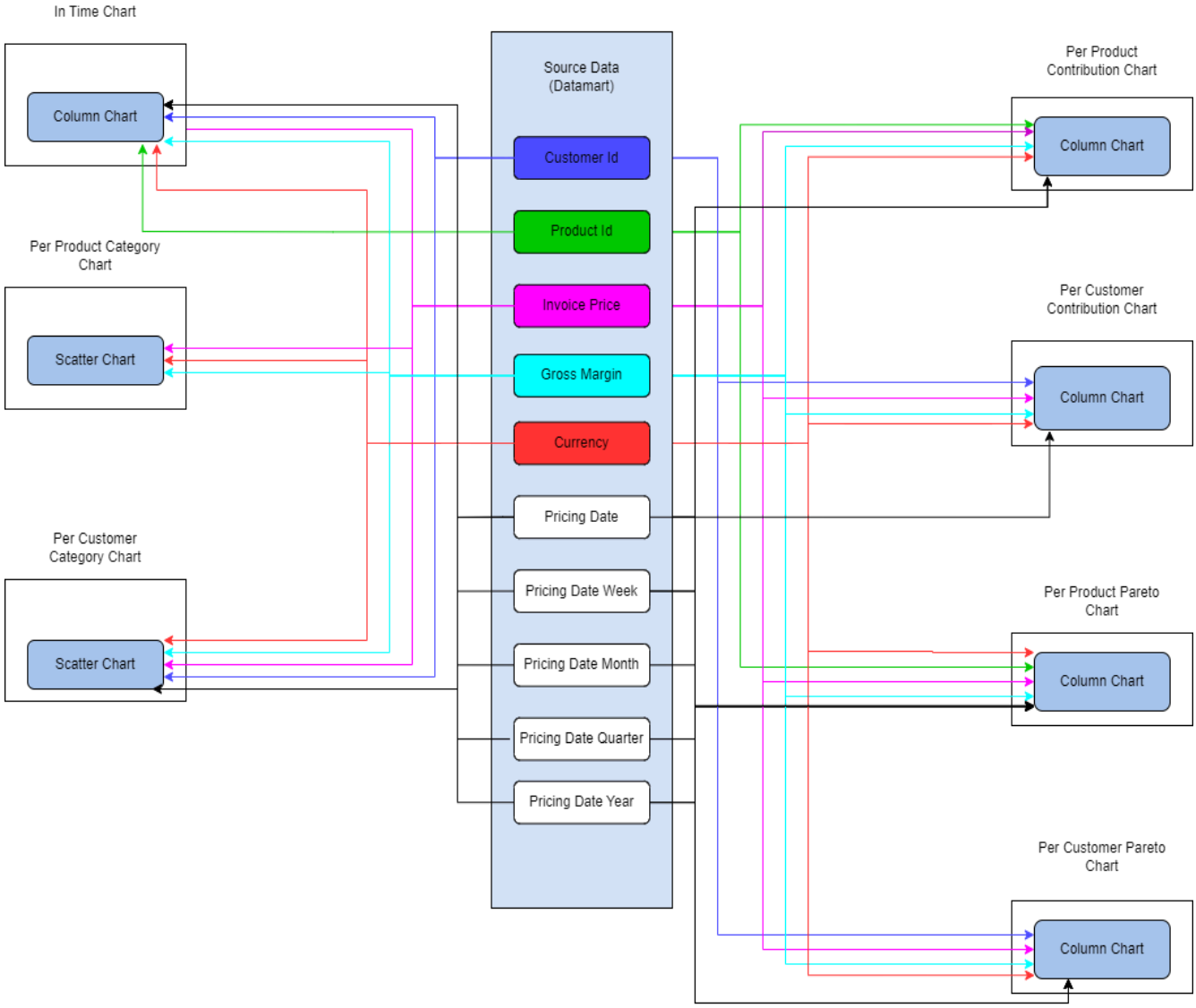
- Shared Library
- Dashboards Library

Data Flow (Sales Insights)

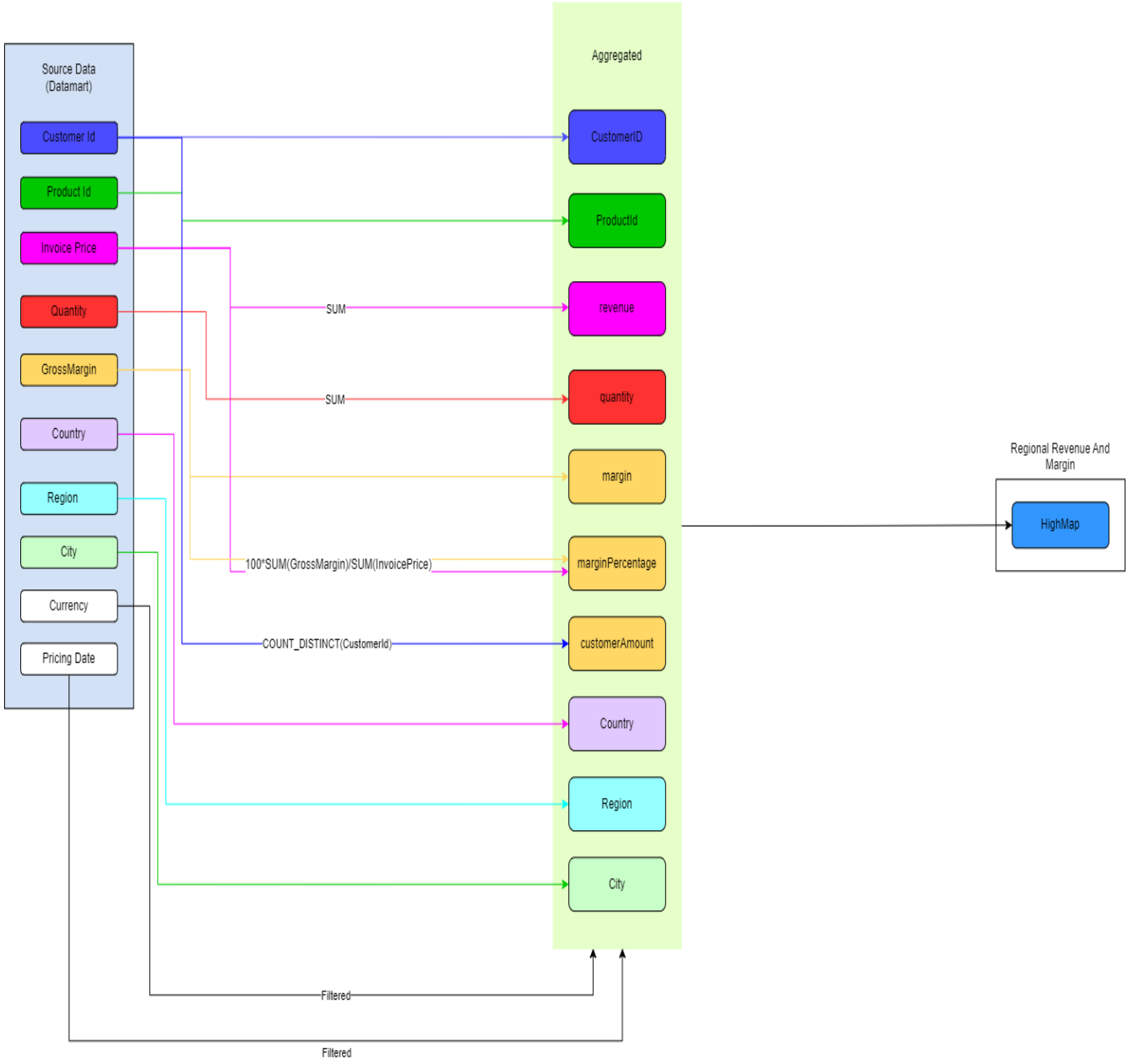
This section describes the data flow for the following Sale Insights Accelerator dashboards:

- 1. SI Revenue and Margin
- 2. SI Regional Revenue and Margin
- 3. SI Outlier Dashboard
- 4. SI Waterfall
- 5. SI Comparison Waterfall
- 6. SI Revenue Breakdown
- 7. SI Margin Breakdown
- 8. SI Causality Dashboard
- 9. SI Period-over-Period Dashboard

1. SI Revenue and Margin

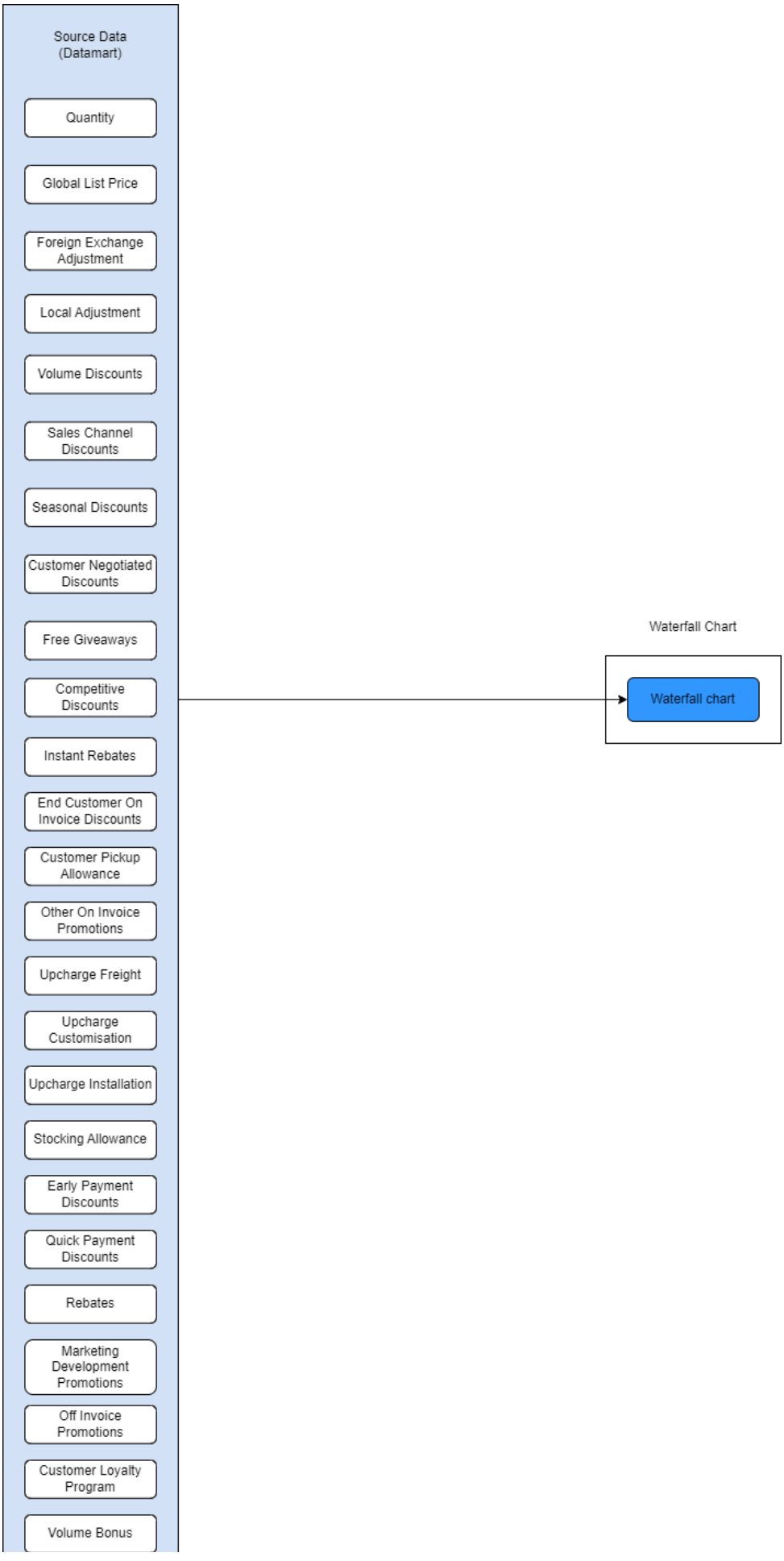


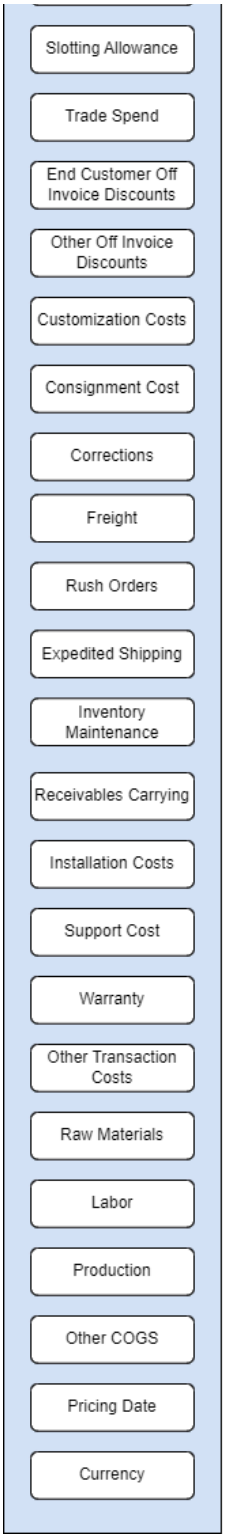
2. SI Regional Revenue and Margin



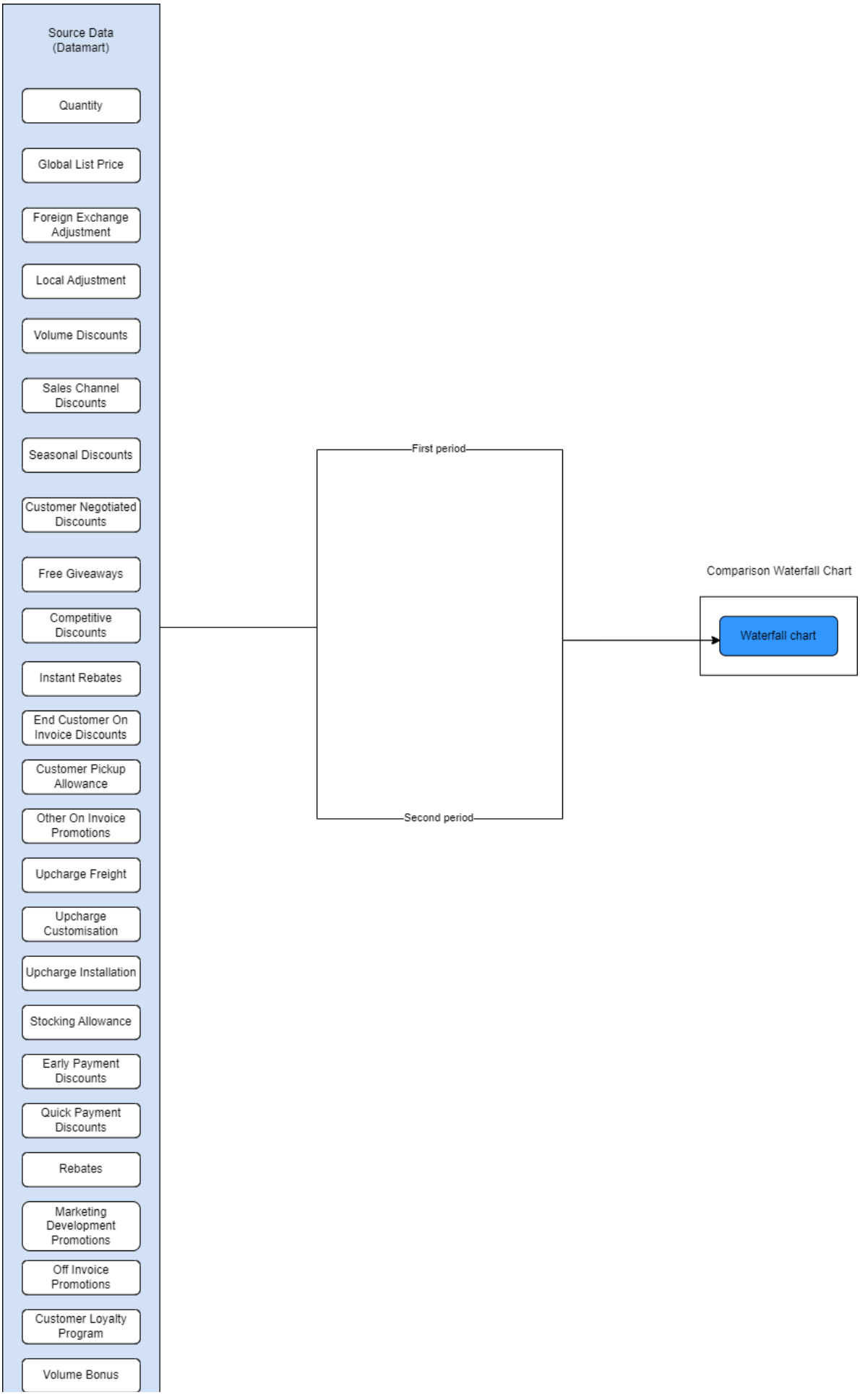
3. SI Outlier Dashboard

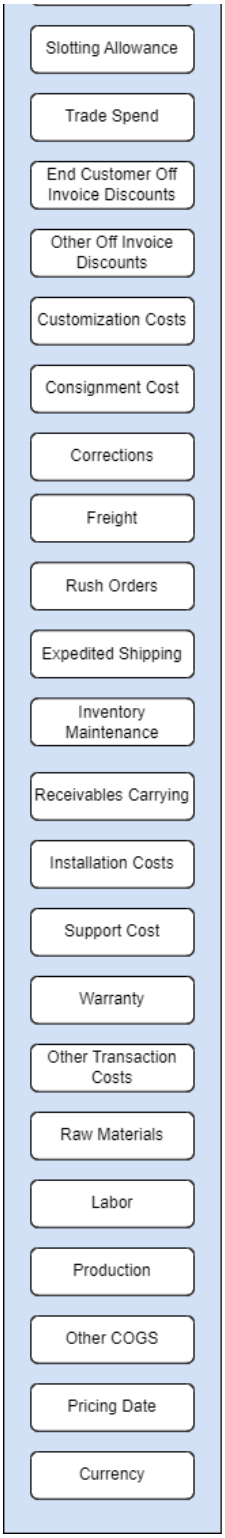
4. SI Waterfall


Source Data
(Datamart)
Quantity
Global List Price
Foreign Exchange Adjustment
Local Adjustment
Volume Discounts
Sales Channel Discounts
Seasonal Discounts
Customer Negotiated Discounts
Free Giveaways
Competitive Discounts
Instant Rebates
End Customer On Invoice Discounts
Customer Pickup Allowance
Other On Invoice Promotions
Upcharge Freight
Upcharge Customisation
Upcharge Installation
Stocking Allowance
Early Payment Discounts
Quick Payment Discounts
Rebates
Marketing Development Promotions
Off Invoice Promotions
Customer Loyalty Program
Volume Bonus
Waterfall Chart
Waterfall chart

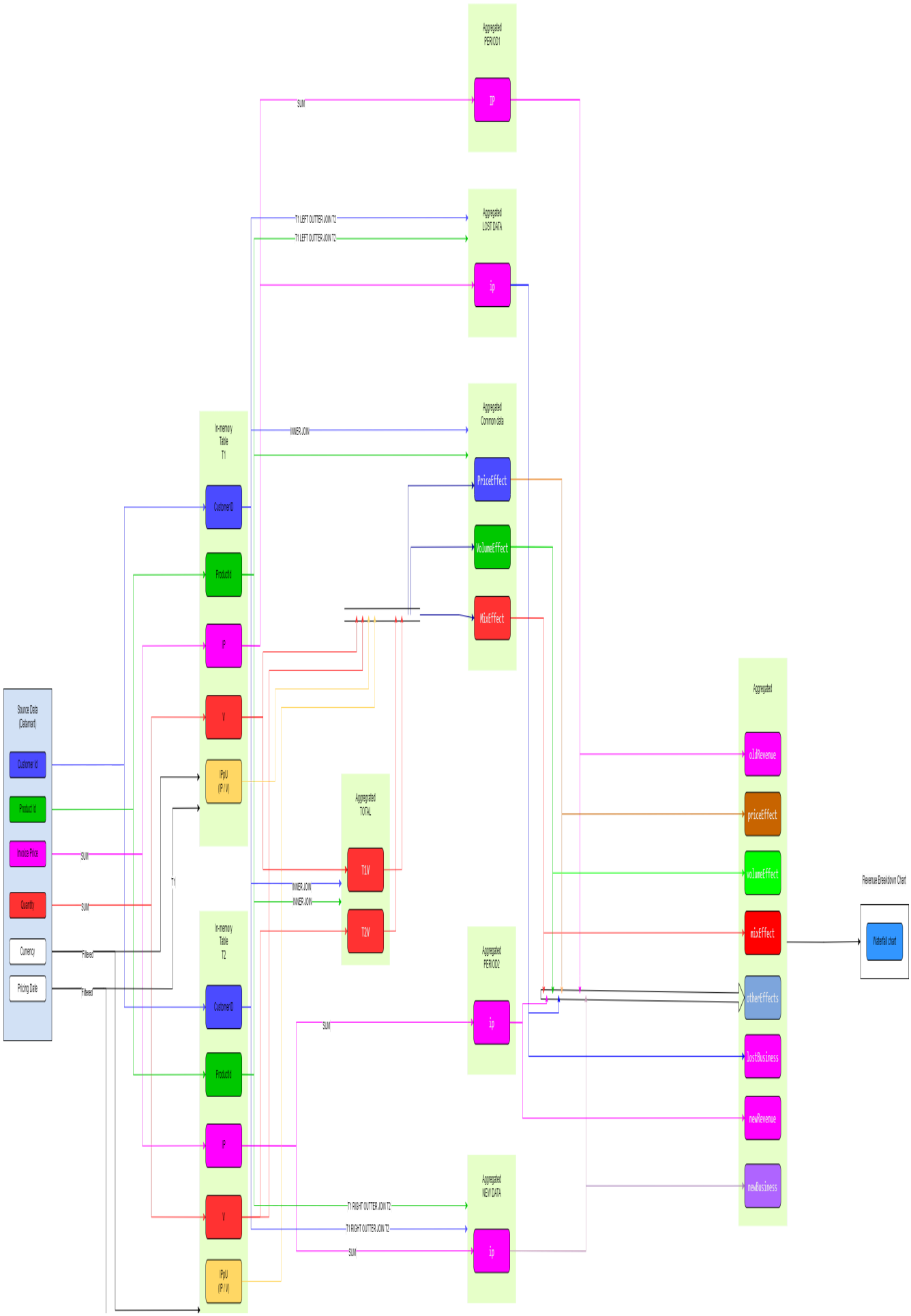


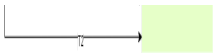
5. SI Comparison Waterfall


Source Data
(Datamart)
Quantity
Global List Price
Foreign Exchange Adjustment
Local Adjustment
Volume Discounts
Sales Channel Discounts
Seasonal Discounts
Customer Negotiated Discounts
Free Giveaways
Competitive Discounts
Instant Rebates
End Customer On Invoice Discounts
Customer Pickup Allowance
Other On Invoice Promotions
Upcharge Freight
Upcharge Customisation
Upcharge Installation
Stocking Allowance
Early Payment Discounts
Quick Payment Discounts
Rebates
Marketing Development Promotions
Off Invoice Promotions
Customer Loyalty Program
Volume Bonus
First period
Second period
Comparison Waterfall Chart
Waterfall chart

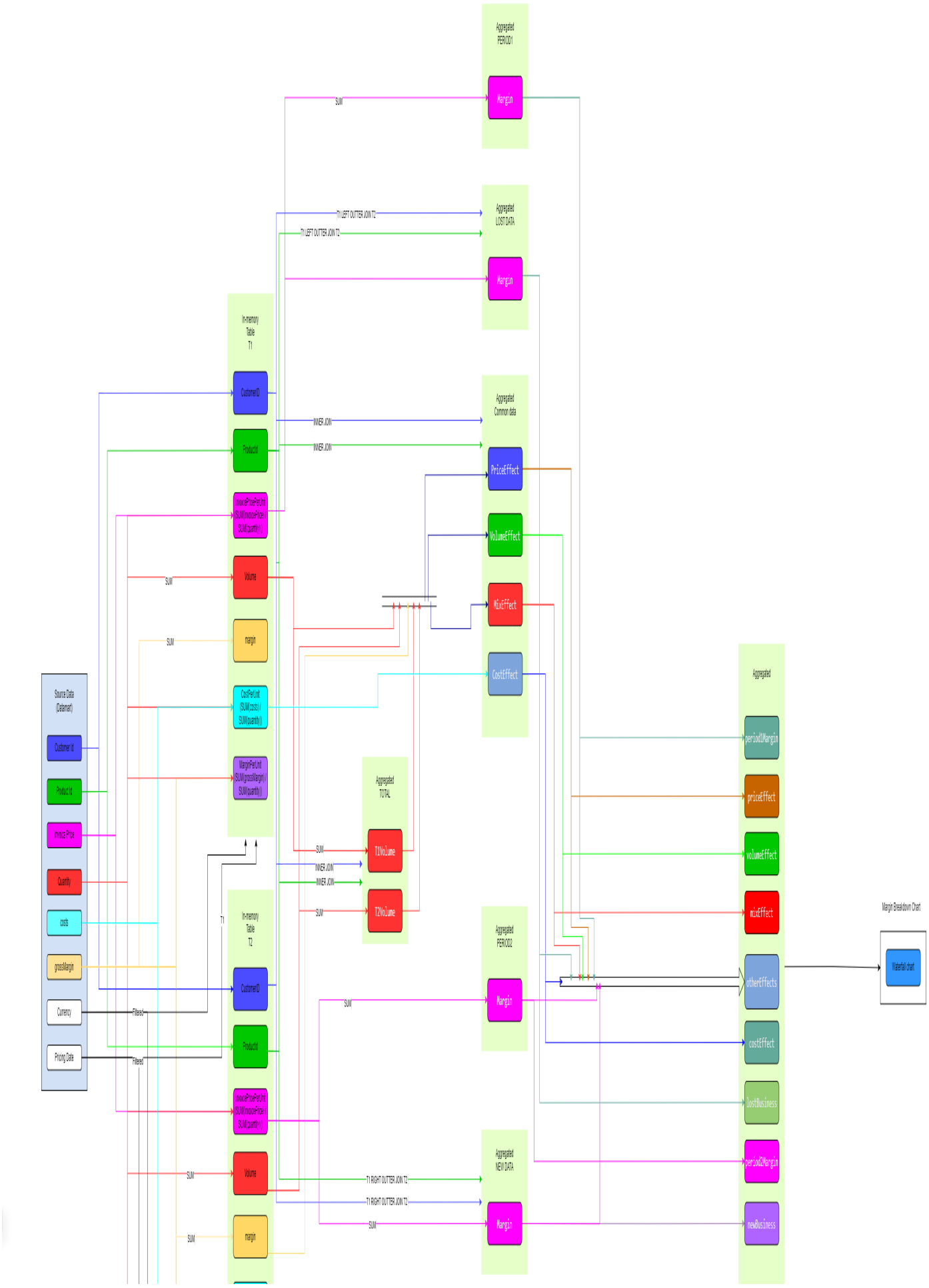


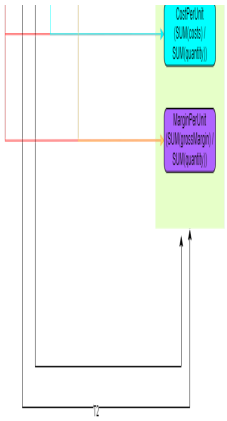
6. SI Revenue Breakdown


Aggregated PERIOD1
IP
SUM
T1 LEFT OUTTER JOIN T2
T1 LEFT OUTTER JOIN T2
Aggregated LOST DATA
ip
In-memory Table T1
INNER JOIN
Aggregated Common data
CustomerID
ProductId
IP
V
IPxV (IP / V)
PriceEffect
VolumeEffect
MixEffect
Source Data (Datamart)
Customer Id
Product Id
Invoice Price
Quantity
Currency
Pricing Date
SUM
SUM
Filtered
Filtered
T1
Aggregated TOTAL
T1V
T2V
INNER JOIN
INNER JOIN
In-memory Table T2
CustomerID
ProductId
IP
V
IPxV (IP / V)
Aggregated PERIOD2
ip
SUM
T1 RIGHT OUTTER JOIN T2
T1 RIGHT OUTTER JOIN T2
SUM
Aggregated NEW DATA
ip
Aggregated
oldRevenue
priceEffect
volumeEffect
mixEffect
otherEffects
lostBusiness
newRevenue
newBusiness
Revenue Breakdown Chart
Waterfall chart



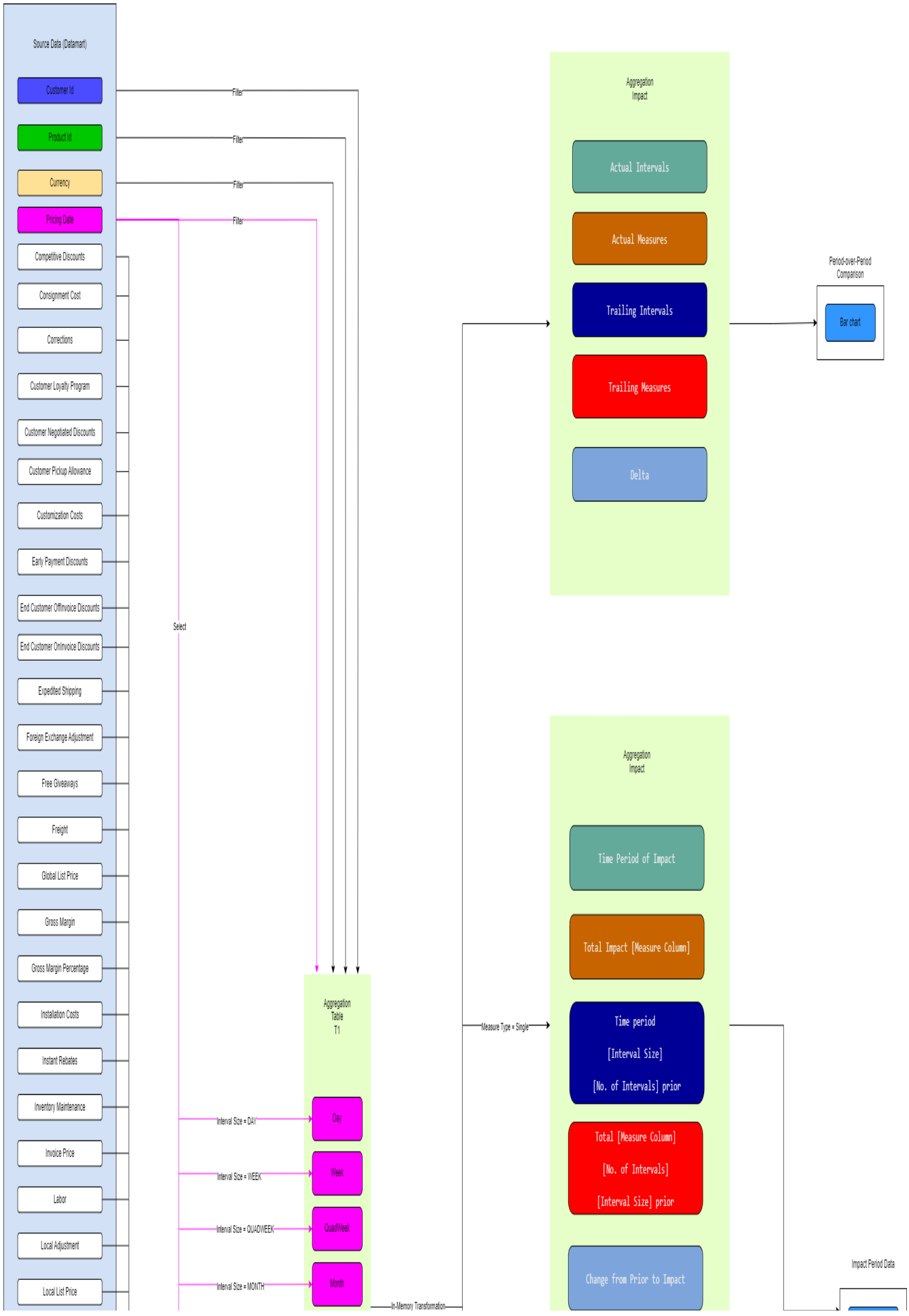
7. SI Margin Breakdown

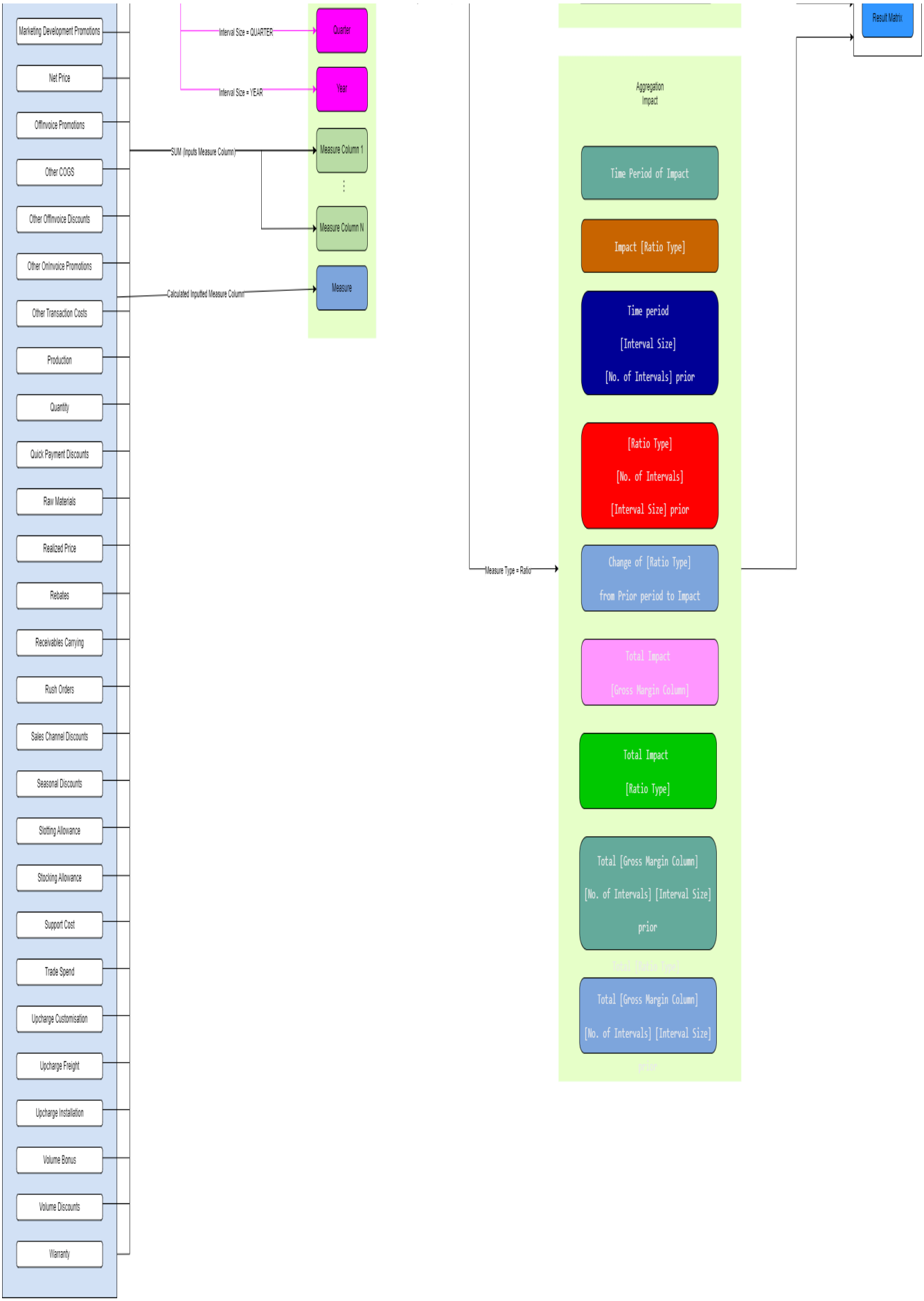

Source Data (Datamart)
Customer Id
Product Id
Invoice Price
Quantity
costs
grossMargin
Currency
Pricing Date
In-memory Table T1
CustomerID
ProductId
invoicePricePerUnit (SUM(invoicePrice)/ SUM(quantity))
Volume
margin
CostPerUnit (SUM(costs) / SUM(quantity))
MarginPerUnit (SUM(grossMargin) / SUM(quantity))
In-memory Table T2
CustomerID
ProductId
invoicePricePerUnit (SUM(invoicePrice)/ SUM(quantity))
Volume
margin
Aggregated PERIOD1
Margin
Aggregated LOST DATA
Margin
Aggregated Common data
PriceEffect
VolumeEffect
MixEffect
CostEffect
Aggregated TOTAL
T1Volume
T2Volume
Aggregated PERIOD2
Margin
Aggregated NEW DATA
Margin
Aggregated
periodLMargin
priceEffect
volumeEffect
mixEffect
otherEffects
costEffect
lostBusiness
periodLMargin
newBusiness
Margin Breakdown Chart
Waterfall chart
SUM
T1 LEFT OUTTER JOIN T2
T1 LEFT OUTTER JOIN T2
INNER JOIN
INNER JOIN
FILtered
FILtered
T1 RIGHT OUTTER JOIN T2
T1 RIGHT OUTTER JOIN T2



8. SI Causality Dashboard

9. SI Period-over-Period Dashboard


Source Data (Datamart)
Customer Id
Product Id
Currency
Pricing Date
Competitive Discounts
Consignment Cost
Corrections
Customer Loyalty Program
Customer Negotiated Discounts
Customer Pickup Allowance
Customization Costs
Early Payment Discounts
End Customer Offinvoice Discounts
End Customer Oninvoice Discounts
Expedited Shipping
Foreign Exchange Adjustment
Free Giveaways
Freight
Global List Price
Gross Margin
Gross Margin Percentage
Installation Costs
Instant Rebates
Inventory Maintenance
Invoice Price
Labor
Local Adjustment
Local List Price
Filter
Filter
Filter
Filter
Select
Aggregation Table T1
Interval Size = DAY
Interval Size = WEEK
Interval Size = QUADWEEK
Interval Size = MONTH
Day
Week
QuadWeek
Month
In-Memory Transformation
Measure Type = Single
Aggregation Impact
Actual Intervals
Actual Measures
Trailing Intervals
Trailing Measures
Delta
Aggregation Impact
Time Period of Impact
Total Impact [Measure Column]
Time period
[Interval Size]
[No. of Intervals] prior
Total [Measure Column]
[No. of Intervals]
[Interval Size] prior
Change from Prior to Impact
Period-over-Period Comparison
Bar chart
Impact Period Data


Marketing Development Promotions
Net Price
Offinvoice Promotions
Other COGS
Other Offinvoice Discounts
Other Oninvoice Promotions
Other Transaction Costs
Production
Quantity
Quick Payment Discounts
Raw Materials
Realized Price
Rebates
Receivables Carrying
Rush Orders
Sales Channel Discounts
Seasonal Discounts
Slotting Allowance
Stocking Allowance
Support Cost
Trade Spend
Upcharge Customisation
Upcharge Freight
Upcharge Installation
Volume Bonus
Volume Discounts
Warranty
Interval Size = QUARTER
Interval Size = YEAR
SUM (Inputs Measure Column)
Calculated Inputted Measure Column
Quarter
Year
Measure Column 1
Measure Column N
Measure
Result Matrix
Aggregation
Impact
Time Period of Impact
Impact [Ratio Type]
Time period
[Interval Size]
[No. of Intervals] prior
[Ratio Type]
[No. of Intervals]
[Interval Size] prior
Measure Type = Ratio
Change of [Ratio Type]
from Prior period to Impact
Total Impact
[Gross Margin Column]
Total Impact
[Ratio Type]
Total [Gross Margin Column]
[No. of Intervals] [Interval Size]
prior
Total [Gross Margin Column]
[No. of Intervals] [Interval Size]

Sales Insights Package 1.12.0

This document summarizes major improvements and fixes introduced in the Accelerate Sales Insights Package release version.

Version	1.12.0
Release Date	Oct 30, 2024

Table of contents:

New Features and Improvements

Description	ID
In the Regional Revenue and Margin Dashboard, Continent should be changed to the required field to avoid error messages.	PFPCS-8961
The preferences for the Sales Insights Dashboards were updated.	PFPCS-8868
Added data readability support for AI Assistant in the Revenue and Margin Dashboard Per Product/Customer Pareto Chart portlets.	PFPCS-8701
Added data readability support for AI Assistant in the Revenue and Margin Dashboard Per Product/Customer category portlets.	PFPCS-8699
Added data readability support for AI Assistant in the Revenue and Margin Dashboard In Time Chart portlet.	PFPCS-8698
Added data readability support for AI Assistant in the Period-over-Period Dashboard portlets.	PFPCS-8692
Added data readability support for AI Assistant in the Causality Dashboard portlets.	PFPCS-8691
Added data readability support for AI Assistant in the Waterfall Comparison Dashboard portlets.	PFPCS-8688
Added data readability support for AI Assistant in the Waterfall Dashboard portlets.	PFPCS-8687
Added data readability support for AI Assistant in the Regional Revenue and Margin Dashboard portlets.	PFPCS-8685

Fixed Issues

Bug Description	ID
The detection rules in the Causality Dashboard under Dashboard Watcher cannot be applied correctly when using ProductId or CustomerId.	PFPCS-8968
It is not possible to skip the Transaction Data loading in the deployment steps.	PFPCS-8956
New deployment does not keep previous values.	PFPCS-8955
Using the 53rd week in the QuadWeek interval size results in an error.	PFPCS-8952
In the Revenue and Margin Dashboard, Contribution charts, revenue columns are not displayed in the drill down mode as margin columns.	PFPCS-8899
In the Revenue and Margin Dashboard, In Time Chart, incorrect Datetime format.	PFPCS-8878
In the Period-over-Period Dashboard, incorrect Datetime format.	PFPCS-8877
In the Revenue and Margin Dashboard, wrong legend for contribution charts.	PFPCS-8742
Using Drill down in the Waterfall Dashboard, invalid categories hierarchy displayed in the breadcrumb.	PFPCS-8744