

Report (Sales Performance)



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General Description

The Sales Performance Report can be used to generate specific tables based on the data available on the dashboard by selecting multiple dimensions and indicators from the indicated fields. Also available are specialized Dimensions for certain GBUs as well as the SAP/Source codes for some of the Dimensions.

You must select at least one dimension (either from GBU dimensions, Codes, or Dimensions) and at least one indicator for the table to appear.

The report can easily be sent to excel using the excel icon at the top right of the table. You can also flip between table formats (pivot and standard) by selecting the "fast change" button at the top right of the table.

[illegible]

Columns can be re-arranged by clicking and dragging the headers of the columns. These can be placed as desired (but only on the pivot table format can you place dimensions as rows instead of columns.) Watch the video below to see how this is done.

Moving Columns.mp4

When in standard pivot table view, you can double click the headers of the columns to sort the table based on that column. See the video below:

Sorting Columns Report.mp4

You can utilize [bookmarking](#) to easily save reports once they are configured to your preferences. Remember, bookmarks will save ALL dimensions, indicators, and filters that you have selected on the dashboard (including time selection) at the time you create the bookmark. For more about bookmarks including how to create and delete them, [click here](#).

Tip: Hold your Ctrl key to choose multiple options from Dimensions and /or Indicators!

Make sure to hold Ctrl if you want to remove dimensions or indicators from the currently selected ones.

DIMENSIONS

- ☐ Year
- ☐ Quarter
- ☒ Month
- ☒ GBU
- ☐ Group of Activity
- ☐ Sub Activity
- ☐ Market
- ☐ Segment
- ☐ Application
- ☐ End-Use
- ☐ Account Type
- ☐ Customer Classification
- ☐ Company
- ☐ Company Zone
- ☐ Region (Ship-to)
- ☐ Country (Ship-to)
- ☐ Plant
- ☐ Plant Origin
- ☐ Corp Sold-to/Payer Grp
- ☐ Corp Sold-to/Payer SubGrp
- ☐ Corp Ship-to Grp
- ☐ Corp Ship-to SubGrp
- ☐ Ship to KA
- ☐ Sold-to / Payer
- ☐ Ship to
- ☐ GBU Product Family
- ☐ Product Hierarchy
- ☒ Product
- ☐ Material
- ☐ Packaging Type
- ☐ Value Stream
- ☒ Sales Rep
- ☐ Intra-Group
- ☐ Intra-GBU
- ☐ Intra-Zone
- ☐ Distributor Flag
- ☐ Incoterms
- ☐ CRH Number

Specific Indicators:

- Revenue
- Volume
- [Budget](#)
- [BFR](#)
- [Forecast](#)
- Commercial Roadmap (only the latest version is displayed)

- EA (Estimated Actuals)

$EA_{\text{year}} = \text{Actual Sales (1st Month to M-1)} + \text{Unconstrained Forecast (M to End of year)}$

$EA_{(M-1, M-2, \dots)} = \text{Actual Sales of the corresponding month}$

$EA_{(M, M+1, M+2, \dots)} = \text{Unconstrained Forecast of the corresponding month}$

- ASP (Average Sales Price = (Revenue/Volume)
- **ASP Ex-Works (Average Sales Price Ex Works) =**

ASP Ex-Works (BW) = Net Sales - Freight and Duties

Volume

- **Freight and Duties (Logistics Costs on P&L)**
- **Freight and Duties per Unit**
- **Margin**
- **% Margin**
- **Margin per Unit**

Specific Dimensions:

- Year
- Quarter
- Month
- GBU
- Group of Activity
- Sub Activity
- Market
- Segment
- Application
- End Use
- Account Type
- Customer Classification
- Company
- Company Zone
- Region (Ship To)
- Country (Ship To)
- Plant
- Plant Origin
- Corp Sold To/Payer Grp
- Corp Sold to/Payer SubGrp
- Corp Ship To Grp
- Corp Ship To Sub Group
- Ship to KA (Key Accounts)
- Sold to/Payer
- Ship To
- GBU Product Family
- Product Hierarchy
- Product
- Material
- Packaging Type
- Value Stream
- Sales Rep
- Intra Group (Y/N)
- Intra GBU (Y/N)
- Intra Zone
- Distributor Flag
- Incoterms
- CRH Number

GBU Dimensions - [Click here for definitions:](#)

- GBU Ship to Grp
- GBU Ship to SubGrp
- Material Ent. Grp
- Material Ent. SubGrp
- Marketing Market
- Ent. End Market
- Micro Region
- Strategic Segment
- Ent. Segment
- Ship to State
- GBU BFC Market (RCS)

Codes:

- Corp Sold to/Payer Grp
- Corp Sold to/Payer SubGrp
- Corp Ship to Grp
- Corp Ship to SubGrp
- Ship to KA
- Sold to/Payer
- Ship To
- Product Hierarchy
- Product
- Material
- Sales Rep
- Source Origin