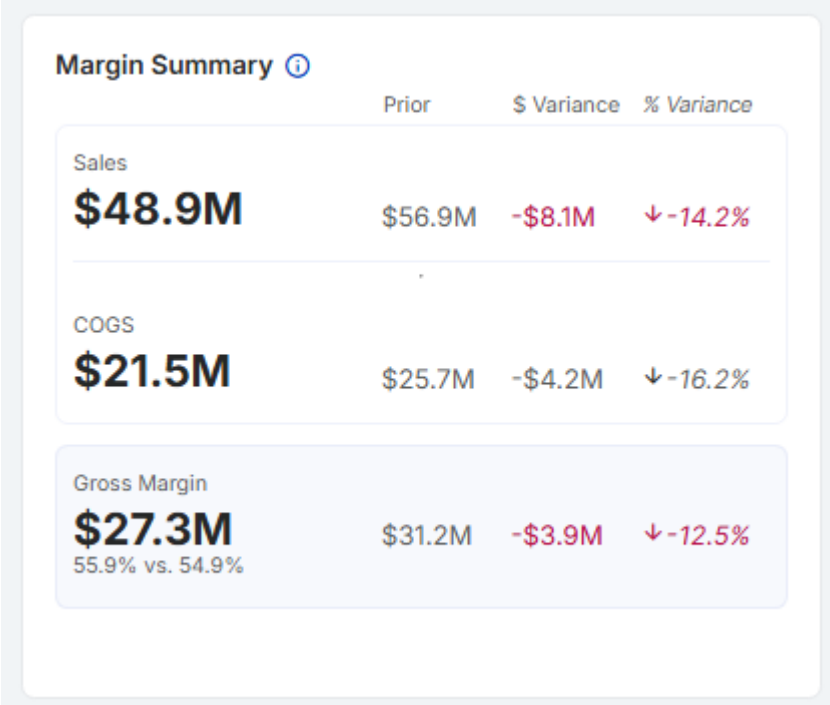
Margin Summary

Product Development - 2025-07-01 - Major Features

Overview

The Margin Summary widget provides an at-a-glance summary of your organization's profitability by analyzing sales and cost data. This tool is essential for understanding financial health and identifying trends over time, allowing for strategic decision-making. The widget utilizes your selected Time Period, Reference Date, and Comparison Period to deliver insightful analytics.



Features

The widget displays the following information for both the current and comparison periods:

Sales

- Current Period Sales ($): Total revenue from sales during the selected current period, less returns.
- Comparison Period Sales ($): Total revenue from sales during the defined comparison period.

- Variance ($): The difference in sales revenue between the current and comparison periods.
- Variance (%): The percentage difference in sales, indicating growth or decline when compared to the comparison period.

Cost of Goods Sold (COGS)

- Current Period COGS ($): Total cost associated with goods sold in the current period.
- Comparison Period COGS ($): Total cost for goods sold during the comparison period.
- Variance ($): The difference in COGS between the current and comparison periods.
- Variance (%): The percentage change in COGS, reflecting cost management efficiency over the periods.

Margin

- Current Period Margin ($): The calculated margin for the current period, derived from Sales minus COGS.
- Comparison Period Margin ($): The margin achieved in the comparison period.
- Variance ($): The difference in margins between the two periods, highlighting profitability changes.
- Variance (%): The percentage change in margin, showcasing the overall improvement or decline in profitability.

Usage

- Adjust Time Period: Select the desired time interval to customize the data comparison (e.g., monthly, quarterly).
- Set Reference Date: Use the reference date to anchor your analysis, affecting the periods you are comparing.

- Choose Comparison Period: Define a comparison timeframe to benchmark current performance against past results.

By effectively utilizing these metrics, you can drive strategic initiatives, assess profitability trends, and optimize sales and cost strategies to foster business growth. The widget's clear presentation of variances in both dollar and percentage terms provides quick insights into significant changes and areas of opportunity.