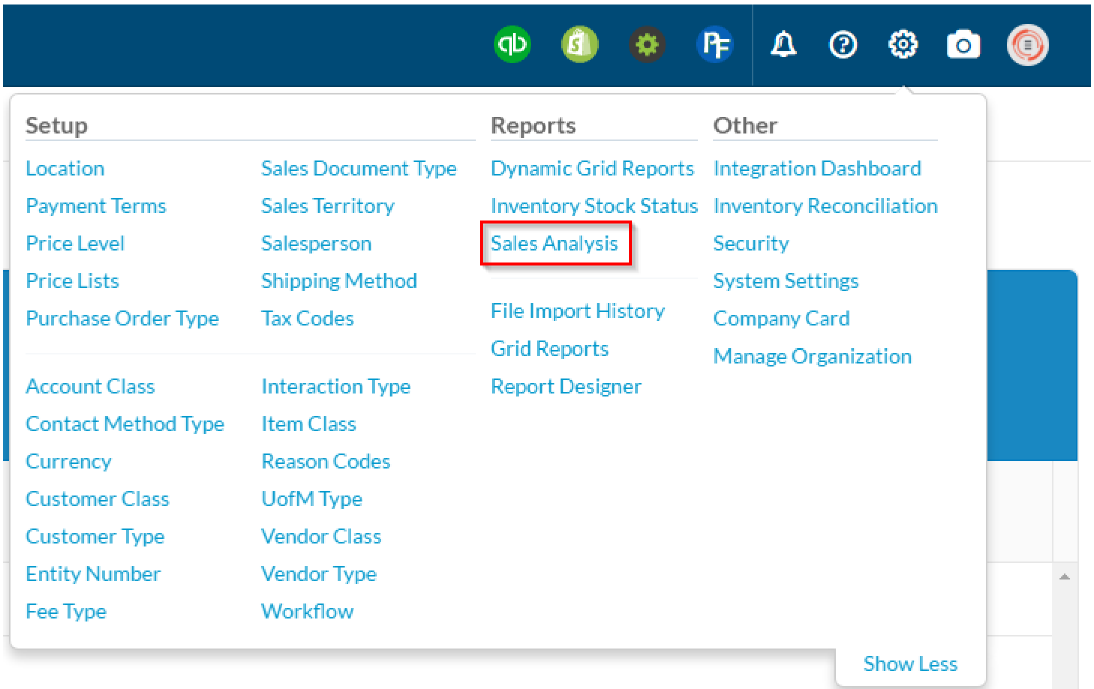
Sales Analysis

Megan De Freitas - 2025-06-10 - Settings

Overview

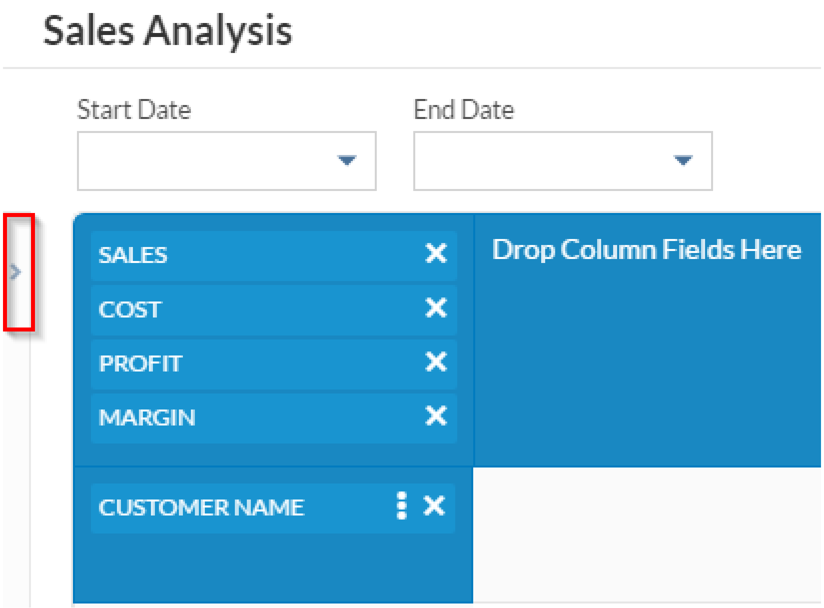
The Sales Analysis report is a dynamic, customizable tool designed to help you take a deeper dive into your company's performance. The Sales Analysis report displays data from posted sales transactions within your company. This report can help you analyze sales data to assess the performance of your sales reps, determine which inventory items are performing the best, which of your customers are purchasing the most product, and much more.

To get started, select **Sales Analysis** from the Settings menu.

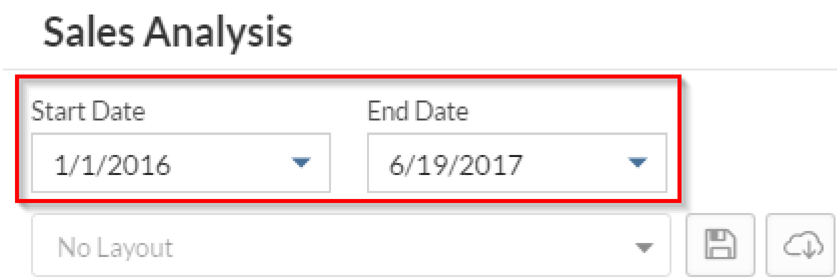


Run a Sales Analysis Report

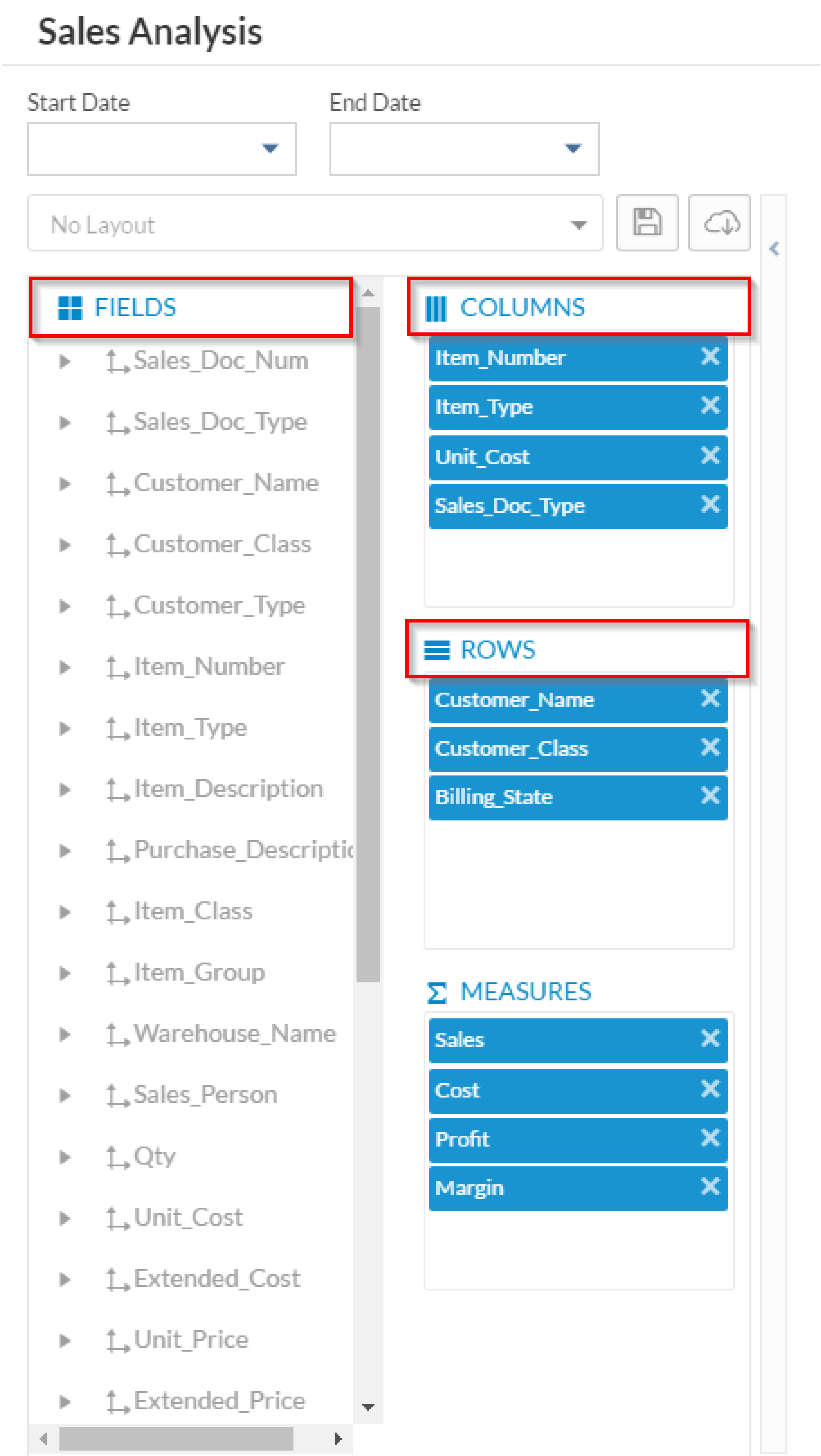
After you've opened the Sales Analysis screen, a blank Sales Analysis report will load. To configure your rows, columns, and measures for the report, click the small arrow on the far left-hand side of the screen.



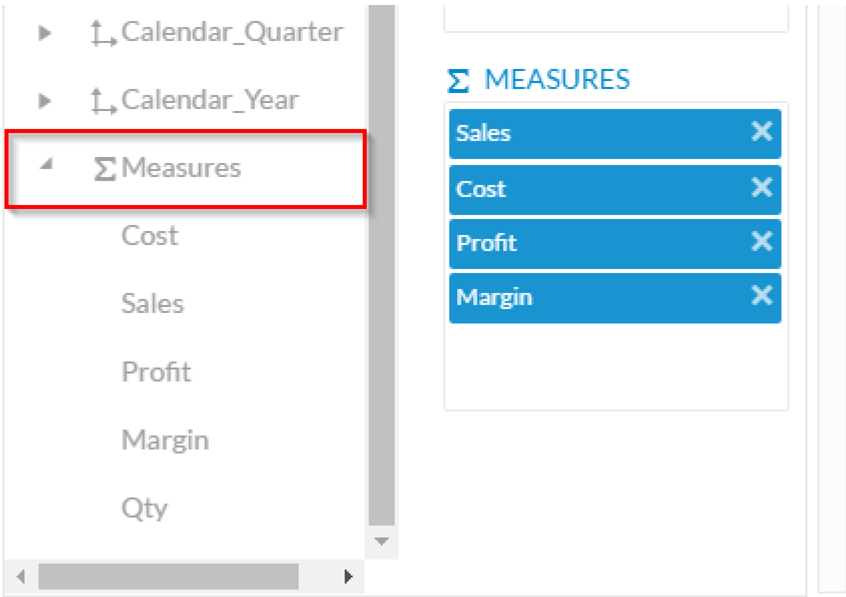
First, specify a date range for your report.



Next, choose the fields you want included in your analysis by dragging them from the Fields pane and dropping them into either the Columns or Rows headers of your report.



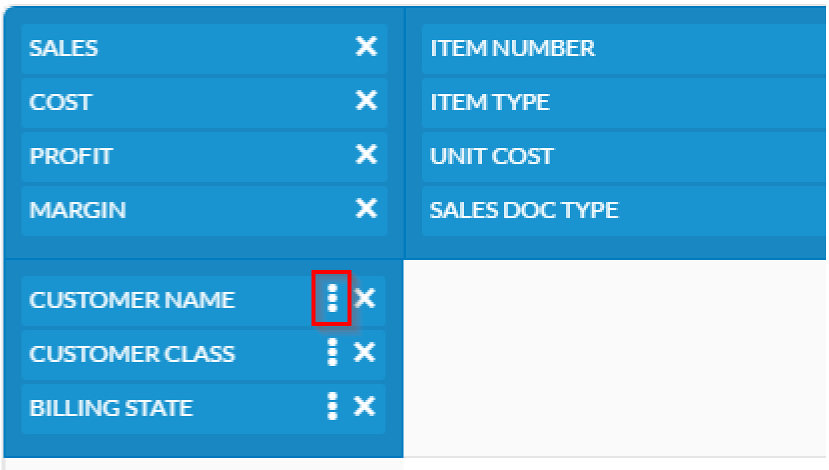
Scroll down to the bottom of the Fields pane to see the Measures dropdown. By default, Sales, Cost, Profit, and Margin are already loaded into your report, but feel free to remove any of these measures or add the Qty (quantity) measure as well.



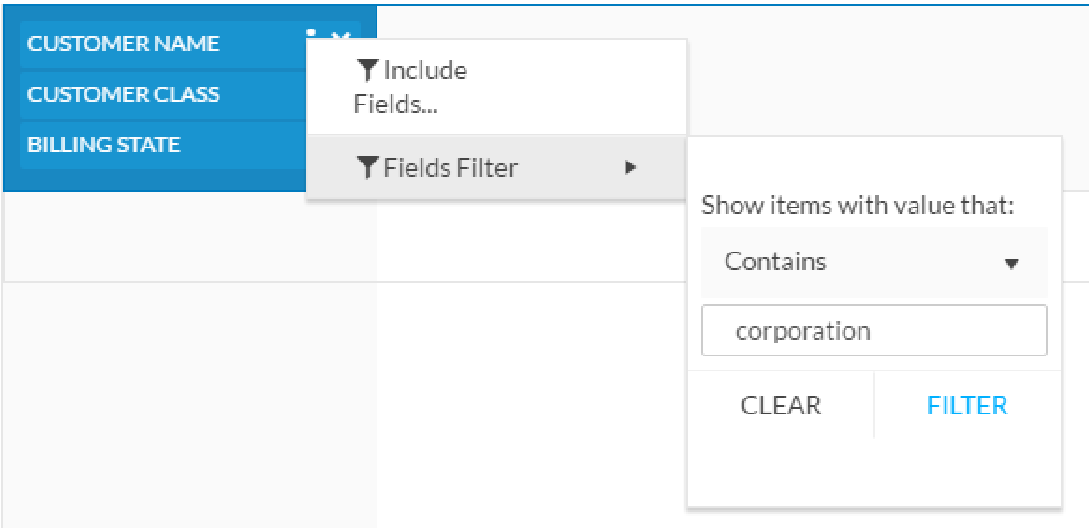
Your data will populate in the main portion of the Sales Analysis screen. Feel free to resize or reorder columns, rows, or measures to arrange the data how you see fit.

Note: It can take up to 24 hours for new or altered data to be reflected in a Sales Analysis report.

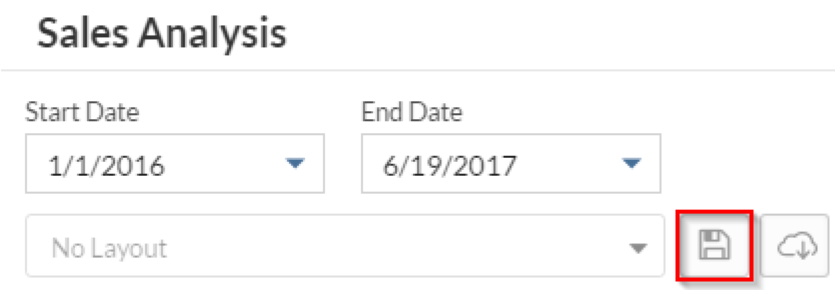
To further customize the data displayed in the Sales Analysis report, click the **filter** icon next to the row or column name.



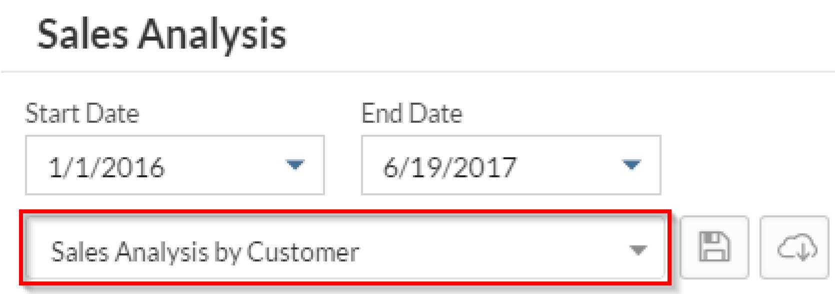
In the dropdown that appears, you can opt to customize which fields pertaining to that dataset are visible in your report, or you can apply a filter to the data.



To save a Sales Analysis report layout, first give your report a name, then click the **Save** button.

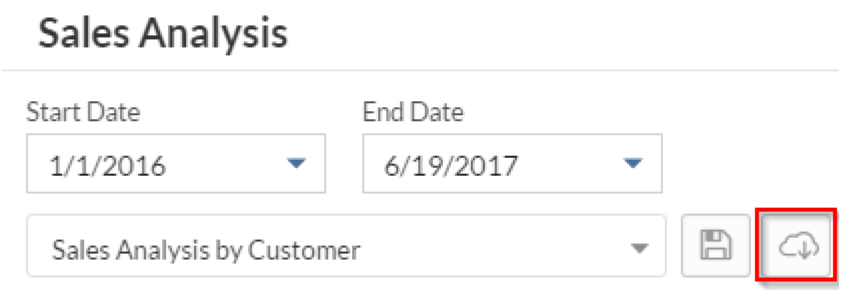


Your saved layout will appear in the Layouts dropdown for easy access if you want to run the same report in the future.



Export a Sales Analysis Report

To export the Sales Analysis report to Excel, click the **Export** button.



The Excel sheet version of the Sales Analysis report will download to your computer's default download location. When you're finished working with the Sales Analysis report, click the **Close** button in the lower right-hand corner to exit the Sales Analysis screen.