



Understanding the Data Presented by Profit Max Platform




Product Development - 2025-07-01 - Application Basics

Invoice Inclusion Criteria

Profit Max Platform analyzes only **posted invoices and returns** that contain at least one sales line item. This ensures that all data presented is representative of actual sales activities and transactions that have occurred.

Date Filtering

- **Date Filters on Document Date:** The screen-level date filters apply specifically to the document date of the documents. This means that when you set a date filter, it filters documents based on their document date, not on the date they were entered or posted.

 Time Period Trailing 12 Months 9/1/23 - 8/31/24	 Reference Date 9/9/2024	 Comparison Period Prior period 9/1/22 - 8/31/23
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- **Inclusive Date Filter Boundaries:** The boundaries of any date filter are inclusive. For example, if you set a date range from January 1, 2022, to December 31, 2022, all invoices with document dates on or between these dates will be included in the data analysis.

Data Synchronization

- **Initial Synchronization:** The time required for the initial data synchronization can vary. It depends on the volume of data a company has and the quality of its internet connection. This initial process can take anywhere from several hours to more than a day.
- **Ongoing Synchronization:** After the initial setup, Profit Max Platform performs periodic synchronizations to update with new and changed records. As of November 2024, these updates occur every 24 hours, keeping the data relatively current with the source system. The data visible in Profit Max Platform reflects changes up through the end of the previous full business day.

By understanding these criteria and processes, users can effectively navigate and filter data within Profit Max Platform, ensuring accurate and up-to-date insights for their business analyses.