Understanding the Data Presented by Profit Max Platform

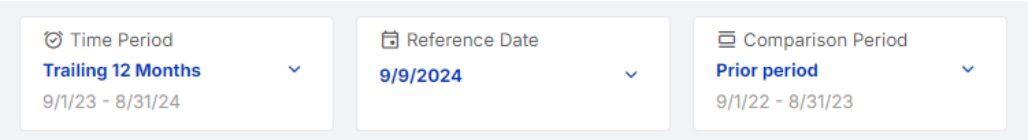
Product Development - 2025-10-07 - Application Basics

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. All totals in PMP are aggregated from the line level.

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.



- **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.

Data Aggregation and Line Type Handling

- **Line-Level Aggregation:**
  All totals in PMP are calculated from **line-level records**. Header-level values are excluded to maintain accuracy and consistency across dashboards.

- **Line Type Filtering:**
  B/C company results include only lines with the **"Item"** line type. Lines of other types are excluded from document totals. If a document contains no "Item" lines, it will still appear in PMP with totals of **$0**.

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.