

Finance - Customer Sale Statistics

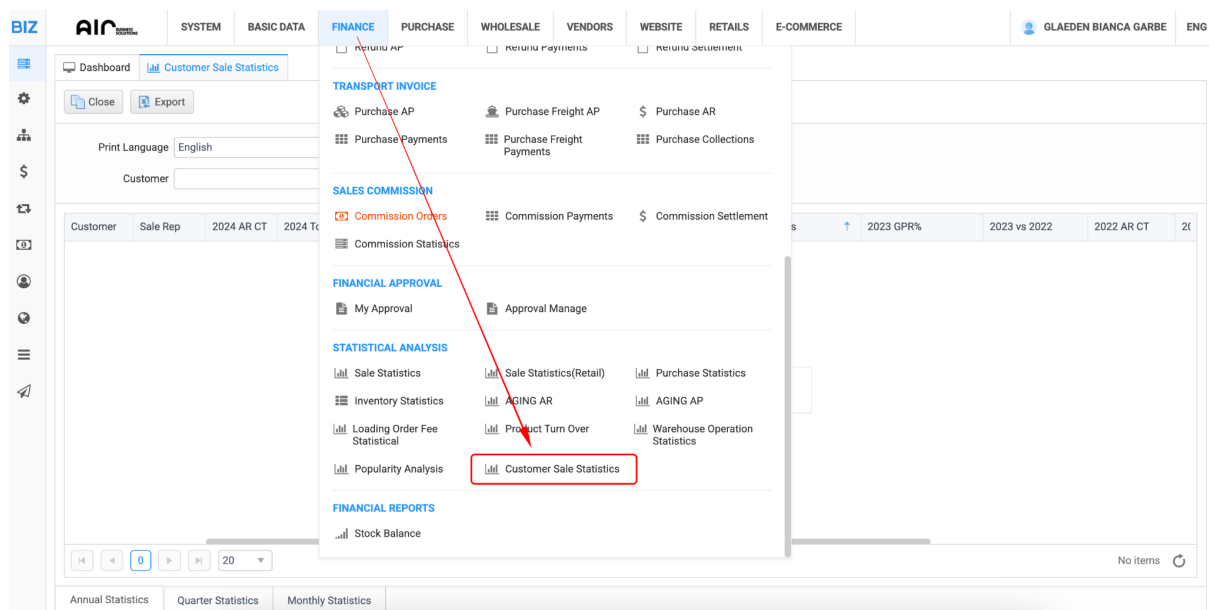
The **Customer Sale Statistics** tab offers a detailed, time-based analysis of customer performance, sales revenue, and profitability across multiple years, quarters, and months. It's a valuable tool for sales representatives, finance teams, and business analysts to evaluate trends, monitor customer value, and make strategic decisions.

This tab is divided into three main sections:

- **Annual Statistics**
- **Quarter Statistics**
- **Monthly Statistics**

Navigation

To access the **Customer Sale Statistics** tab:



1. Log in to your **ERP System**.
2. Navigate to the **Sales Reports** or **Customer Analytics** module.
3. Click on **Customer Sale Statistics**.

4. Choose the sub-tab you wish to explore:

- **Annual Statistics**
- **Quarter Statistics**
- **Monthly Statistics**

Annual Statistics

This view provides a year-over-year breakdown of sales metrics and performance indicators for each customer.

The screenshot displays the 'Customer Sale Statistics' interface. At the top, there's a navigation bar with tabs for SYSTEM, BASIC DATA, FINANCE, PURCHASE, WHOLESale, VENDORS, WEBSITE, RETAILS, and E-COMMERCE. Below this, a sidebar on the left contains various icons for navigation. The main content area features a 'Customer Sale Statistics' tab, a 'Print Language' dropdown set to 'English', a 'Group by Sale Rep' toggle switch, and input fields for 'Customer' and 'Sale Rep'. Below these, a table with 14 columns is shown: Customer, Sale Rep, 2024 AR CT, 2024 Total, 2024 Gross, 2024 GPR%, 2024 vs 2023, 2023 AR CT, 2023 Total, 2023 Gross, 2023 GPR%, 2023 vs 2022, 2022 AR CT, and 2022 Total. The table is currently empty, displaying 'No records available.' At the bottom, there's a pagination bar showing '0' of 20 items and a tab bar with 'Annual Statistics', 'Quarter Statistics', and 'Monthly Statistics'.

Key Fields:

- **Customer** – Name or code of the client.
- **Sales Rep** – Sales representative managing the customer.
- **2024 AR CT** – Accounts receivable count for 2024.
- **2024 Total** – Total sales value for 2024.
- **2024 Gross** – Gross profit from 2024 sales.
- **2024 GPR%** – Gross profit ratio (%).

- **2024 vs 2023** – Year-over-year change from 2023 to 2024.
- *(Data continues similarly for 2023, 2022, etc.)*

Searching and Filtering Options:

- **Print Language** – English / Chinese
- **Group by Sale Representative**
- **Customer** – Search by customer name or code.
- **Sale Representative**
- **Export** – Download results as an **Excel File**.

Quarter Statistics

This tab breaks down sales performance by quarter within a selected year.

Key Fields:

- **Customer**
- **Sale Rep**
- **Q1 AR CT, Q1 Total, Q1 Gross, Q1 GPR%**
- **Q2 AR CT, Q2 Total, Q2 Gross, etc.**

This view is helpful for analyzing seasonal trends or tracking mid-year performance fluctuations.

Searching and Filtering Options:

- **Print Language** – English / Chinese
- **Group by Sale Representative**
- **Year** – Select the year to analyze (e.g., 2024, 2023).

- **Customer**
- **Sale Representative**
- **Export** – Export data to an **Excel File**.

Monthly Statistics

This view provides a highly granular, month-by-month sales breakdown for individual customers and sales reps.

Key Fields:

- **Customer**
- **Sale Rep**
- **M1 AR CT, M1 Total, M1 Gross, M1 GPR%**
- **M2 AR CT, M2 Total, M2 Gross**, etc.
(M1 = January, M2 = February, and so on)

Useful for short-term trend analysis, monthly performance tracking, or setting monthly sales targets.

Searching and Filtering Options:

- **Print Language** – English / Chinese
- **Group by Sale Representative**
- **Year**
- **Customer**
- **Sale Representative**
- **Export** – Download the monthly report as an **Excel File**.

The **Customer Sale Statistics** tab is a powerful reporting feature that gives stakeholders a clear picture of customer behavior, revenue performance, and profitability over different time frames. With intuitive filters and exportable reports,

your team can easily conduct performance reviews, plan forecasts, and identify growth opportunities.

For help with setting targets or customizing report views, please contact your ERP administrator or refer to the Sales Analytics module documentation.