

Bookings and Sales Invoices Dashboard

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This dashboard is based on data from a scheduled extract that occurs daily.

Purpose

The Bookings and Sales Invoices Dashboard combines the un-invoiced dollars from Bookings and Sales Invoices from the current year. This gives a more accurate picture of Sales by including commitments from the Customer in addition to what has been invoiced.

Details

Prior year Sales include only Sales Invoice information from the prior year.

Filters:

- **Prepaid Bookings Only** – This option is available to include only Prepaid Bookings. If *No* is selected, both Prepaid and Unpaid Bookings are included.
- **End Date Selection** – Choosing *End Date* uses the selected *End Date* as the end of the date range. Choosing *Today* uses the current date as the end of the date range.
- **Start Date** – Selecting a *Start Date* uses the selected date as the start of the date range. The current year Bookings and Invoices use the selected *Start Date* while the prior year sales Invoices and Bookings go back 1 year prior to this date.
- **End Date** – Selecting a *Start Date* allows for determining which Invoices and Bookings to include. The current year Bookings and Invoices use the exact *Start Date* while the prior year sales Invoices go back 1 year prior to the selected date.
- **Department Type** – Select how to view department details; *Department Name*, *Department Category*, or *Sales Class*.
- **Department** – Choose to filter by Department. The available options depend on the selection for the *Department Type* parameter.