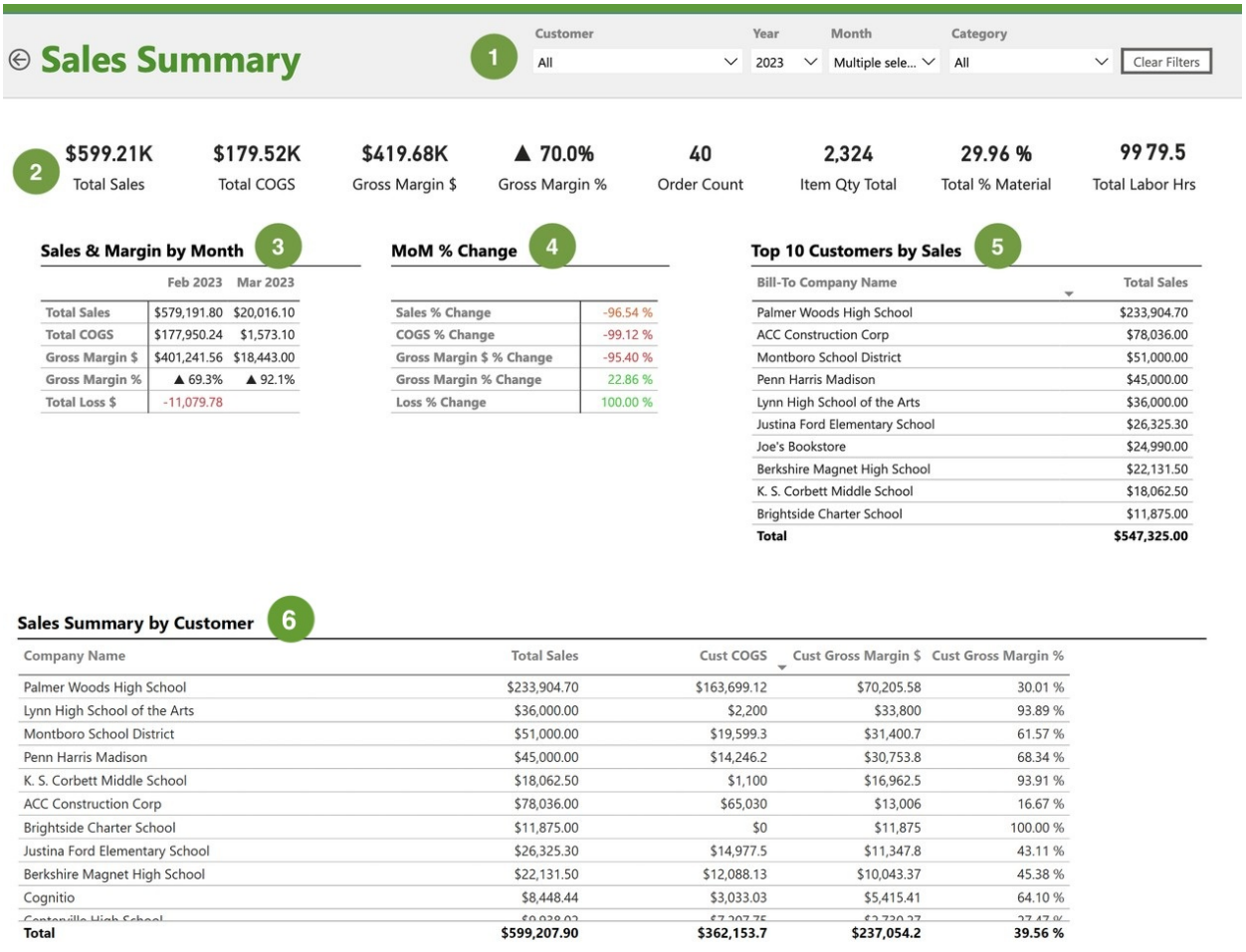
Understanding the Power BI Sales Summary Report

Last Modified on 11/24/2026 11:25 am EST

This guide gives an overview of the Power BI Sales Summary report, which is included in the aACE Power BI Report Library. It is intended for general users.

The Power BI Sales Summary report shows you how much you sold, what it cost you, and how much you made as profit. The report only covers invoices dated in the period you select. It does not forecast or include pipeline data. You can filter the report by customer, year, month, and category.



Sales Summary by Customer 6

Company Name	Total Sales	Cust COGS	Cust Gross Margin $	Cust Gross Margin %
Palmer Woods High School	$233,904.70	$163,699.12	$70,205.58	30.01 %
Lynn High School of the Arts	$36,000.00	$2,200	$33,800	93.89 %
Montboro School District	$51,000.00	$19,599.3	$31,400.7	61.57 %
Penn Harris Madison	$45,000.00	$14,246.2	$30,753.8	68.34 %
K. S. Corbett Middle School	$18,062.50	$1,100	$16,962.5	93.91 %
ACC Construction Corp	$78,036.00	$65,030	$13,006	16.67 %
Brightside Charter School	$11,875.00	$0	$11,875	100.00 %
Justina Ford Elementary School	$26,325.30	$14,977.5	$11,347.8	43.11 %
Berkshire Magnet High School	$22,131.50	$12,088.13	$10,043.37	45.38 %
Cognitio	$8,448.44	$3,033.03	$5,415.41	64.10 %
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Total	**$599,207.90**	**$362,153.7**	**$237,054.2**	**39.56 %**

Products Invoicing at Low Margins 7

LI Code	Item Qty	Item Sales	Item COGS	Item Margin $	Item Margin %	Item % of Total Sales
1000 pk zip	2	$24	$26	($2)	-8.33 %	0.00 %
BBC36L/R	1	$100	$842.73	($742.73)	-742.73 %	0.02 %
BC09	3	$270	$1,075.74	($805.74)	-298.42 %	0.05 %
BSP09	1	$110	$589.82	($479.82)	-436.20 %	0.02 %
HP-PPS-IAI	2	$4,998	$5,160.45	($162.45)	-3.25 %	0.83 %
LS3312	1	$130	$1,268.36	($1,138.36)	-875.66 %	0.02 %
OC339624	1	$90	$2,501.82	($2,411.82)	-2679.80 %	0.02 %
TBLT-8C	31	$420.76	$464.69	($43.93)	-10.44 %	0.07 %

TB-SCI4	15	$843.6	$2,249.85	($1,406.25)	-166.70 %	0.14 %
W0930	5	$550	$1,216.15	($666.15)	-121.12 %	0.09 %
W302424	1	$60	$516.81	($456.81)	-761.35 %	0.01 %
Total	**63**	**$7,596.36**	**$15,912.42**	**($8,316.06)**	**-109.47 %**	**1.27 %**

Sales Summary by Product 8

LICode	Item Qty	Item Sales	Item COGS	Item Margin $	Item Margin %
1000 pk zip	16	$24.00	$3,975.95	$6,855.74	63.29 %
BBC36L/R	13	$100.00	$8,011.43	($6,701.43)	-511.56 %
BC09	13	$270.00	$8,011.43	($6,701.43)	-511.56 %
BOM-ZT-B	240	$0.00	$1,962.6	$1,122.1	36.38 %
BSP09	13	$110.00	$8,011.43	($6,701.43)	-511.56 %
CUST-CAB-BASIC	1	$0.00		$0	
CUST-LGHT		$1,000.00			
Total	**2320**	**$599,207.90**	**$179,523.34**	**$424,351.01**	**70.27 %**

Invoice List 9

Invoice ID	LI Code	Qty	Item Sales
50544	1000 pk zip	1.00	$12.00
50545	1000 pk zip	1.00	$12.00
50522	BBC36L/R	1.00	$100.00
50522	BC09	3.00	$270.00
50517	BOM-ZT-B	50.00	$0.00
50522	BSP09	1.00	$110.00
50524	CUST-CAB-BASIC	1.00	$0.00
50546	CUST-LGHT	1.00	$1,000.00
Total			**$599,207.90**

Table of Contents

- 1. Filters
- 2. Headline Figures
- 3. Sales & Margin by Month
- 4. MoM% (Month-over-Month) Change
- 5. Top 10 Customers By Sales
- 6. Sales Summary by Customer
- 7. Products Invoicing at Low Margins
- 8. Sales Summary by Product
- 9. Invoice List

1. Filters

Use the dropdown menus at the top to choose a customer, year, month, or product category. Select Clear Filters to start over.

The Category filter works by order. If you select a category, aACE displays every order that has at least one product from it. You can then view all the products for each of the orders, including ones from other categories.

Top

2. Headline Figures

These totals in the Headline Figures section cover the period you selected:

- **Total Sales** — Amount invoiced
- **Total COGS** — What those items cost you
- **Gross Margin $** and **Gross Margin %** — Profit, in dollars and as a share of sales
- **Order Count** — Number of orders
- **Item Qty Total** — Number of items sold
- **Total % Material** — Share of sales that went to materials
- **Total Labor Hrs** — Hours logged on the work. If no one logged time, this is blank.

Top

3. Sales & Margin by Month

The Sales & Margin by Month table compares selected months. It shows sales, COGS, gross margin, and any loss for each month.

A margin of exactly 100% means no cost has been entered for those items yet.

Top

4. MoM% (Month-over-Month) Change

The MoM% Change table shows how much your sales, COGS, gross margin, and loss changed from the previous month. The change is displayed as percentages.

Top

5. Top 10 Customers By Sales

This table lists the 10 customers you invoiced the most, from highest to lowest.

Top

6. Sales Summary by Customer

This table shows sales, COGS, and gross margin (in dollars and percent) for each customer.

Top

7. Products Invoicing at Low Margins

This table lists products that sold for less than they cost. Use it to find items that might need a price or cost check. For each product, it shows:

- **Item Qty** — How many were sold
- **Item Sales** and **Item COGS** — What you charged and what it cost you
- **Item Margin $** and **Item Margin %** — The profit or loss. Losses appear in red and parentheses.
- **Item % of Total Sales** — How much of your total sales this item made up

Top

8. Sales Summary by Product

This table shows quantity, sales, COGS, and margin in dollars and percent for each product.

Top

9. Invoice List

This table lists every invoice line in the report with its invoice number, product, quantity, and sales amount. Use it to confirm where a value from one of the previous sections came from.
