

Dimensions

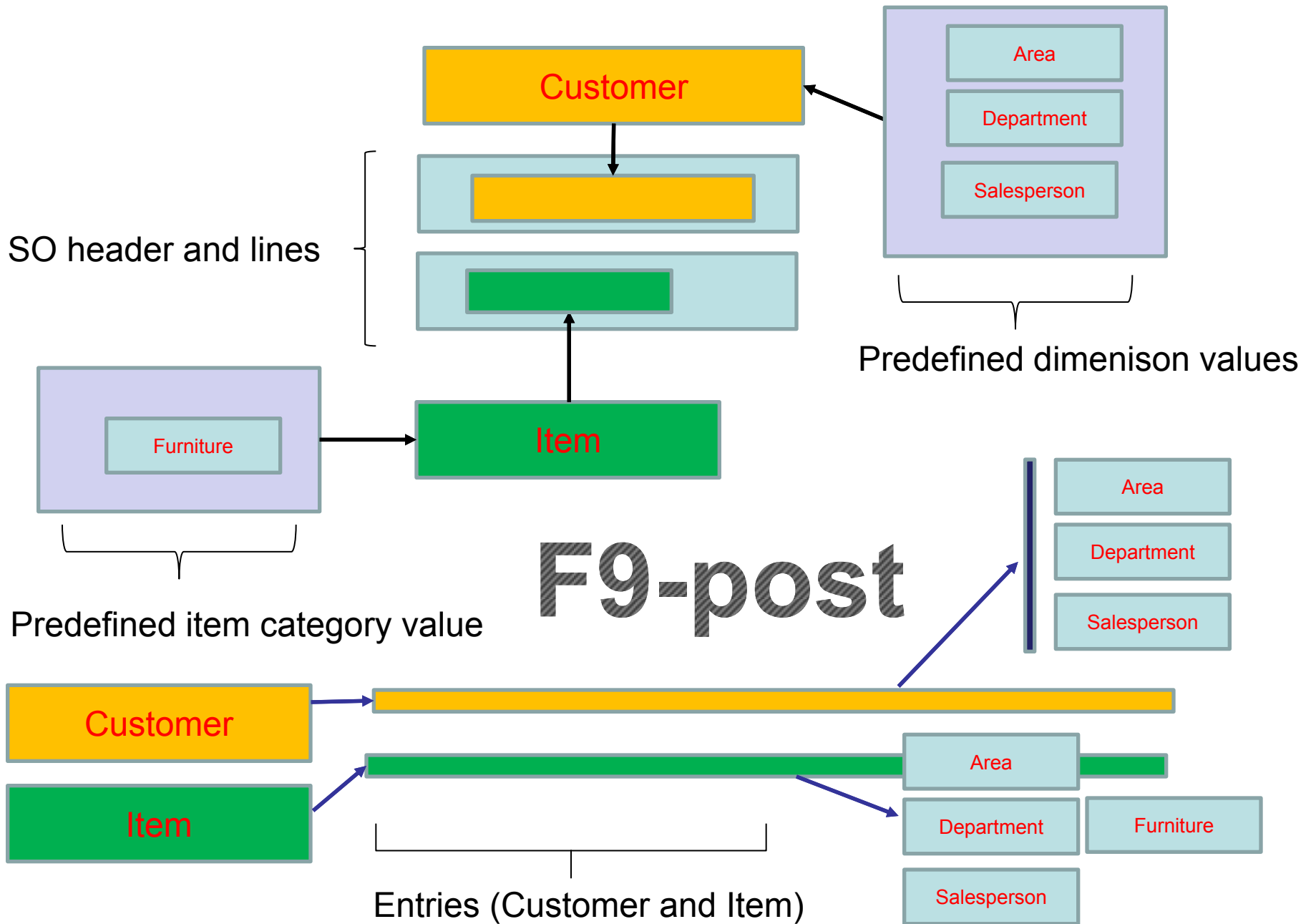
J.Skorkovský, KPH

Explanation

- Dimensions are data that you add to entries to categorize them for analysis
- You can have dimensions that indicate, which project or department an entry originates from.
- You can use dimensions instead of setting up separate general ledger accounts for each department and project
-

Explanation

- This allows you to have rich analysis information in your data without having to use a complicated chart of accounts.
- You can define an unlimited number of dimensions with an unlimited number of dimension values.
- You set up all of the different dimensions that you want to track in the Dimensions window. The Dimensions window contains one line for each dimension, such as Project, Department, Area, and Salesperson.



Dimensions (use search window)

HOME

CRONUS International Ltd. ?

New Edit List Delete Map to IC Dim. with Same Code Dimension Values Account Type Default Dim. Translations OneNote Notes Links Refresh Find

Dimensions

Type to filter (F3) Code No filters applied

Code	Name	Code Caption	Filter Caption	Description	Bloc...
AREA	Area	Area Code	Area Filter		<input type="checkbox"/>
BUSINESSGR...	Business Group	Businessgroup Code	Businessgroup Filter		<input type="checkbox"/>
CUSTOMER...	Customer Group	Customergroup Code	Customergroup Filter		<input type="checkbox"/>
DEPARTMENT	Department	Department Code	Department Filter		<input type="checkbox"/>
PROJECT	Project	Project Code	Project Filter		<input type="checkbox"/>
PURCHASER	Purchaser	Purchaser Code	Purchaser Filter		<input type="checkbox"/>
SALESCAMP...	Sales campaign	Salescampaign Code	Salescampaign Filter		<input type="checkbox"/>
SALESPERSON	Salesperson	Salesperson Code	Salesperson Filter		<input type="checkbox"/>

Dimension values

Edit - Dimension Values - AREA - Area

HOME ACTIONS CRONUS International Ltd. ?

New View List Edit List Delete Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

Dimension Values Code Filter: AREA

Code	Name	Dimension Value Type	Totaling	Bloc...
10	Europe	Begin-Total		<input type="checkbox"/>
20	Europe North	Begin-Total		<input type="checkbox"/>
30	Europe North (EU)	Standard		<input type="checkbox"/>
40	Europe North (Non EU)	Standard		<input type="checkbox"/>
45	Europe North, Total	End-Total	20..45	<input type="checkbox"/>
50	Europe South	Standard		<input type="checkbox"/>
55	Europe, Total	End-Total	10..55	<input type="checkbox"/>
60	America	Begin-Total		<input type="checkbox"/>
70	America North	Standard		<input type="checkbox"/>
80	America South	Standard		<input type="checkbox"/>
85	America, Total	End-Total	60..85	<input type="checkbox"/>

Dimension combinations

The screenshot displays the Microsoft Dynamics NAV interface for the Sales Order Processor. The main window shows the 'Dimension Combinations' page, which includes a 'General' section with a 'Show Column Name' checkbox and a 'Dimension Combinations Matrix' table. The matrix table has columns for Code, Name, AREA, BUSINESSGROUP, CUSTOMERGROUP, DEPARTMENT, PROJECT, PURCHA..., SALESCAMPAIGN, and SALESPERSON. The 'AREA' column is highlighted with a red box, and a red arrow points from this box to the 'Dimension Value Combinations' page. The 'Dimension Value Combinations' page also has a 'General' section and a 'Dimension Value Combinations Matrix' table with columns for Code, Name, HOME, INDUSTRIAL, INTERCOMPANY, and OFFICE.

Dimension Combinations Matrix

Code	Name	AREA	BUSINESSGROUP	CUSTOMERGROUP	DEPARTMENT	PROJECT	PURCHA...	SALESCAMPAIGN	SALESPERSON
AREA	Area								
BUSINESSGR...	Business Group		Limited					Limited	
CUSTOMER...	Customer Group		Limited			Blocked			
DEPARTMENT	Department								
PROJECT	Project					Blocked			
PURCHASER	Purchaser								
SALESCAMP...	Sales campaign		Limited						
SALESPERSON	Salesperson								

Dimension Value Combinations Matrix

Code	Name	HOME	INDUSTRIAL	INTERCOMPANY	OFFICE
SUMMER	Summer				
WINTER	Winter		Blocked		Blocked

Customer dimensions

The image shows a screenshot of the Microsoft Dynamics CRM interface. The main window is titled "Edit - Customer Card - 20000 · Selangorian Ltd.". The navigation pane on the left has a red box around the "Dimensions" link. The main content area shows the "General" tab for the customer card, with fields for No., Name, Address, Post Code, City, Country/Region Code, Phone No., Primary Contact No., Contact, Search Name, Balance (LCY), Credit Limit (LCY), Salesperson Code, Responsibility Center, Service Zone Code, Blocked, and Last Date Modified. A secondary window titled "Edit - Default Dimens..." is overlaid on the bottom right, showing a table of default dimensions.

Customer Card Details:

Field	Value
No.:	20000
Name:	Selangorian Ltd.
Address:	153 Thomas Drive
Address 2:	
Post Code:	CV6 1GY
City:	Coventry
Country/Region Code:	GB
Phone No.:	
Primary Contact No.:	
Contact:	
Search Name:	
Balance (LCY):	
Credit Limit (LCY):	
Salesperson Code:	
Responsibility Center:	
Service Zone Code:	
Blocked:	
Last Date Modified:	

Default Dimensions Table:

Dimen... Code	Dimension Value Code	Value Posting
AREA	30	Code Manda...
CUSTOMER...	LARGE	Same Code
DEPARTMENT	SALES	

Sales Order

HOME ACTIONS NAVIGATE

Statistics Card **Dimensions** Approvals Comments
 Credit Cards Transaction Log Entries
 Order Assembly Orders

Invt. Put-away/Pick Lines Warehouse Whse. Shipment Lines
 Prepayment Invoices Prepayment Credit Memos
 Prepayment

104004 · Deerfield Graphics Company

General

Sell-to Customer No.: 40000
 Sell-to Contact No.: CT000037
 Sell-to Customer Name: Deerfield Graphics Company
 Sell-to Address: 10 Deerfield Road
 Sell-to Address 2:
 Sell-to Post Code: GL1 9HM
 Sell-to City: Gloucester
 Sell-to Contact: Mr. Kevin Wright
 No. of Archived Versions: 0
 Posting Date: 16.01.2019
 Order Date: 16.01.2019
 Document Date: 16.01.2019

Edit Dimension Set Entries

Type to filter (F3) | Dimension Code

Dimen... Code	Dimension Value Code	Dimension Value Name
AREA	30	Europe North (EU)
CUSTOMER...	SMALL	Small Business
DEPARTMENT	SALES	Sales
SALESPERSON	PS	Peter Sadow

^ Show fewer fields

Lines

Line Functions Order New Find Filter Clear Filter

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Amount Excl. VAT	Line Discount %	Qty. to Ship	Quantity Shipped
Item	LS-10PC	Loudspeak...	WHITE	30			BOX	59,00	1 770,00			

Customer Ledger Entries

Customer Ledger Entries

Type to filter (F3) | Document No. | Filter: 40000

Posting Date	Document Type	Document No.	Cust... No.	Message to Recipient	Description	Curre... Code	Original Amount	Amount	Remaining Amount	Due Date	Pmt. Discou...	Pmt. [Tolera
10.12.2018	Invoice	103029	40000		Invoice 1001		1 328,88	1 328,88	1 328,88	10.01.2019	18.12.2018	18.12.2

HOME ACTIONS

View List | Edit List | Show Posted Document | Navigate | Apply Entries | Unapply Entries... | Reverse Transaction... | Incoming Document | Reminder/Fin. Charge Entries | Applied Entries | Dimensions | Detailed Ledger Entries | Microsoft Excel | Show as List | Show as Chart

Dimension Set Entries

Type to filter (F3) | Dimension Code

Dime... Code	Dimension Value Code	Dimension Value Name
AREA	30	Europe North (EU)
CUSTOME...	SMALL	Small Business
DEPARTME...	SALES	Sales
SALESPERS...	PS	Peter Sadow

Sales Analysis by dimensions I.

Departments

- ▷ Financial Management
- ◀ Sales & Marketing
- Sales
- Order Processing
- Marketing
- Inventory & Pricing
- Microsoft Dynamics CRM
- ▷ Purchase

Sales & Marketing, Reports and Analysis

Analysis & Reporting

- Sales Budgets
- Sales Analysis Reports
- Sales Analysis by Dimensions
- Production Forecast
- Item Dimensions - Detail
- Item Dimensions - Total

Sales & Marketing

Choose by department

- Sales
- Order Processing
- Marketing

...or choose by category

- Lists
- Tasks
- Reports and Analysis
- Documents
- Archive
- Administration

Analysis by dimensions II.

View - Analysis View List Sales - Sales

CRONUS International Ltd.

HOME ACTIONS

New Edit Edit Analysis View Filter Show as List Show as Chart OneNote Notes Links Show Attached Page

View

Analysis

Update

Process

Manage

Filter

Show as List

Show as Chart

OneNote

Notes

Links

Show Attached

Page

Analysis View List Sales

Type to filter (F3) Code

No filters applied

Code	Name	Incl... Bud...	Last Date Updated	Dimension 1 Code	Dimension 2 Code	Dimension 3 Code
CUSTOMERS	Customers	<input checked="" type="checkbox"/>	31.03.2017	CUSTOME...	SALESPERS...	
DEFAULT	Default analysis view	<input type="checkbox"/>	31.03.2017	AREA	CUSTOME...	SALESPERS...

Additional analysis setup -after every change you have to update

Edit - Sales Analysis View Card - Sales - DEFAULT - Default analysis view

HOME ACTIONS NAVIGATE CRONUS International Ltd. ?

View Edit New Delete Manage Update OneNote Notes Links Refresh Clear Filter Page Go to Previous Next

Sales - DEFAULT - Default analysis view

General

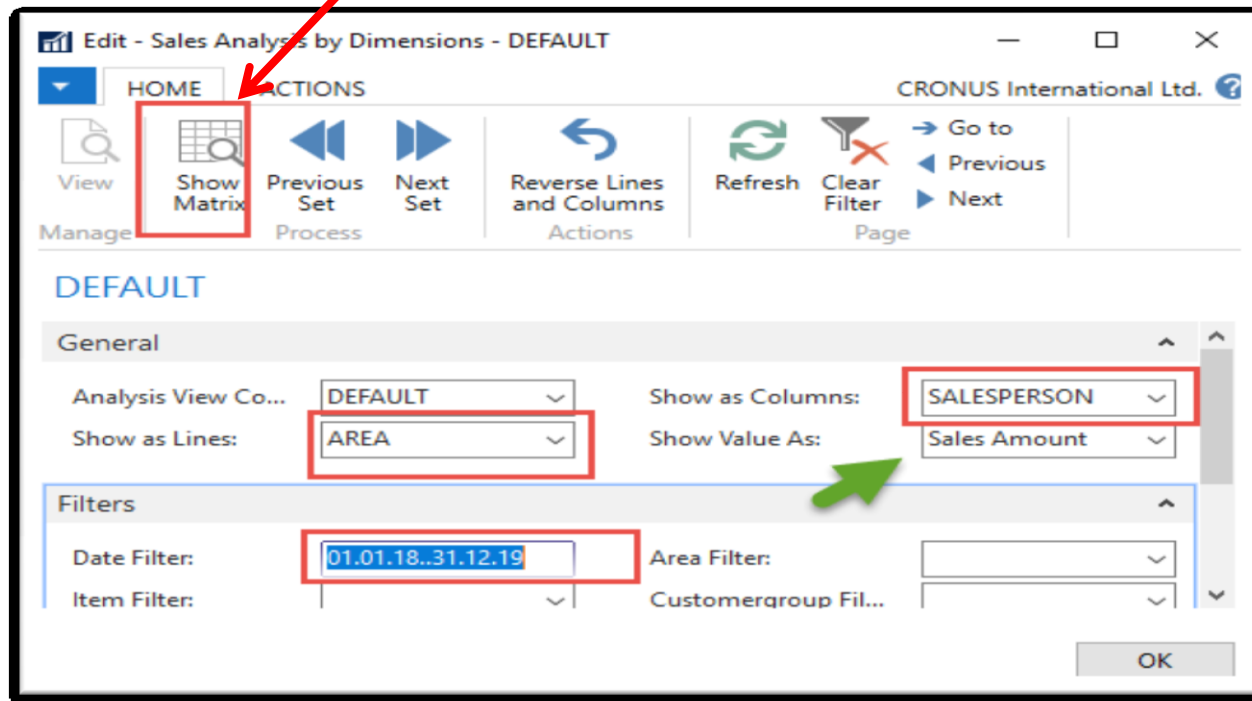
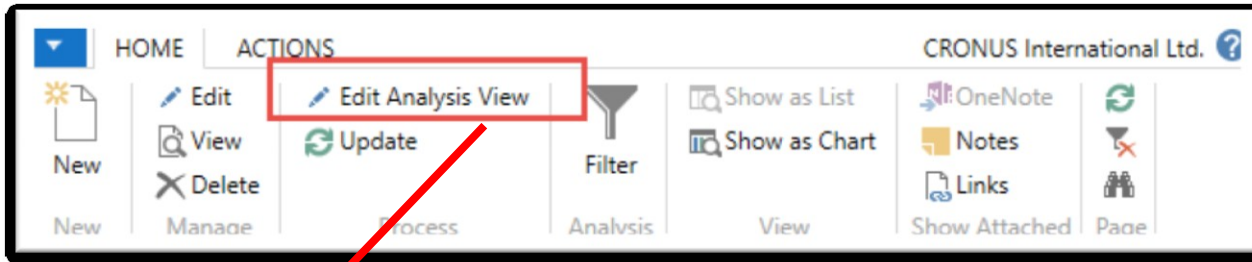
Code:	DEFAULT	Last Date Updated:	29.11.2017
Name:	Default analysis view	Last Entry No.:	403
Item Filter:		Last Budget Entry No.:	13
Location Filter:		Update on Posting:	<input type="checkbox"/>
Date Compression:	Quarter	Include Budgets:	<input checked="" type="checkbox"/>
Starting Date:	1.1.2018	Blocked:	<input type="checkbox"/>

Dimensions

Dimension 1 Code:	AREA	Dimension 3 Code:	SALESPERSON
Dimension 2 Code:	CUSTOMERGROUP		

OK

Analysis by dimensions III.



Here you can change analysis variant (Lines, Columns and Type of value)

Additional analysis setup

The screenshot displays the 'Edit - Sales Analysis by Dimensions - DEFAULT' application window. The interface includes a ribbon with 'HOME' and 'ACTIONS' tabs, and a title bar for 'CRONUS International Ltd.'. The ribbon contains several groups of icons: 'Manage' (View), 'Process' (Show Matrix, Previous Set, Next Set), 'Actions' (Reverse Lines and Columns), and 'Page' (Refresh, Clear Filter, Go to, Previous, Next). The 'Show Matrix', 'Previous Set', and 'Next Set' icons are highlighted with a red box. Below the ribbon, the 'DEFAULT' section is expanded to show 'General', 'Filters', 'Options', and 'Matrix Options' sections. The 'General' section includes 'Analysis View Co...' (DEFAULT), 'Show as Columns:' (Period), 'Show as Lines:' (AREA), and 'Show Value As:' (Sales Amount). The 'Filters' section includes 'Date Filter:' (01.01.18..31.12.19), 'Area Filter:', 'Item Filter:', 'Customergroup Filt...', 'Location Filter:', and 'Salesperson Filter:'. The 'Options' section includes 'Show:' (Actual Amounts), 'Rounding Factor:' (None), 'Show Column Name:' (checkbox), and 'Show Opposite Sign:' (checkbox). The 'Matrix Options' section includes 'View by:' (Quarter) and 'Column Set:' (1/2018..4/2019). The 'Actual Amounts' dropdown and the 'View by:' and 'Column Set:' fields are highlighted with red boxes.

HOME ACTIONS CRONUS International Ltd. ?

View Manage Process Actions Page

Show Matrix Previous Set Next Set Reverse Lines and Columns Refresh Clear Filter Go to Previous Next

DEFAULT

General

Analysis View Co... DEFAULT Show as Columns: Period

Show as Lines: AREA Show Value As: Sales Amount

Filters

Date Filter: 01.01.18..31.12.19 Area Filter:

Item Filter: Customergroup Filt...

Location Filter: Salesperson Filter:

Budget Filter:

Options

Show: Actual Amounts Show Column Name:

Rounding Factor: None Show Opposite Sign:

Matrix Options

View by: Quarter Column Set: 1/2018..4/2019

Analysis : Area-Period (Quarter)

Sales Analysis by Dim Matrix Type to filter (F3) | Code ▾ | →

No filters applied

Code	Name	Total Quantity	Total Sales Amount	1/2018	2/2018	3/2018	4/2018	1/2019	2/2019
10	Europe								
20	Europe North								
30	Europe North (EU)	-200,90	57 582,36				1 596,50	55 985,86	
40	Europe North (Non EU)	-24,00	17 080,83					17 080,83	
45	Europe North, Total	-224,90	74 663,19				1 596,50	73 066,69	
50	Europe South								
55	Europe, Total	-224,90	74 663,19				1 596,50	73 066,69	
60	America								
70	America North	-19,00	1 898,20					1 898,20	
80	America South								
85	America, Total	-19,00	1 898,20					1 898,20	

Setup of analysis : Area-Salesperson

Edit - Sales Analysis by Dimensions - DEFAULT

HOME ACTIONS CRONUS International Ltd. ?

View Show Matrix Previous Set Next Set Reverse Lines and Columns Refresh Clear Filter Go to Previous Next

Manage Process Actions Page

DEFAULT

General

Analysis View Co...: DEFAULT Show as Columns: SALESPERSON
Show as Lines: AREA Show Value As: Sales Amount

Filters

Date Filter: 01.01.18..31.12.19 Area Filter:
Item Filter: Customergroup Fil...
Location Filter: Salesperson Filter:
Budget Filter:

Options

Show: Actual Amounts Show Column Name:
Rounding Factor: None Show Opposite Sign:

Matrix Options

View by: Quarter Column Set: 1/2018..4/2019

OK

Analysis by dimensions IV.

Sales Analysis by Dim Matrix ▾

Type to filter (F3) | Code ▾ | →

Show results:

✗ Where Code ▾ is Enter a value.

+ Add Filter

Code	Name	Total Quantity	Total Sales Amount	JR	LM	MD	PS
10	Europe						
20	Europe North						
30	Europe North (EU)	-171,90	51 730,06	39 877,02			11 853,04
40	Europe North (Non EU)	-24,00	17 080,83	17 080,83			
45	Europe North, Total	-195,90	68 810,89	56 957,85			11 853,04
50	Europe South						
55	Europe, Total	-195,90	68 810,89	56 957,85			11 853,04
60	America						
70	America North	-16,00	1 499,02	1 499,02			
80	America South						
85	America, Total	-16,00	1 499,02	1 499,02			

Analysis by dimensions V.

The screenshot shows a software window titled "Edit - Sales Analysis by Dimensions - DEFAULT". The window has a ribbon interface with two tabs: "HOME" and "ACTIONS". The "HOME" tab is active, showing a "Manage" group with "View" and "Show Matrix" buttons, a "Process" group with "Previous Set" and "Next Set" buttons, an "Actions" group with "Reverse Lines and Columns" and "Refresh" buttons, and a "Page" group with "Clear Filter" and "Go to" buttons. The "Go to" group also includes "Previous" and "Next" buttons. The window title bar includes standard minimize, maximize, and close buttons, and the text "CRONUS International Ltd." with a help icon.

Below the ribbon, the "DEFAULT" section is visible. It contains a "General" section with the following settings:

Analysis View Co...	DEFAULT	Show as Columns:	CUSTOMERGRO...
Show as Lines:	AREA	Show Value As:	COGS Amount

The "General" section is highlighted with a red box. Below it is a "Filters" section with the following settings:

Date Filter:	01.01.18..31.12.19	Area Filter:	
Item Filter:		Customergroup Fil...	

An "OK" button is located at the bottom right of the dialog box.

Analysis by dimensions VI.

Sales Analysis by Dim Matrix ▾

Type to filter (F3) | Code ▾ → ^

Show results:

✗ Where Code ▾ is Enter a value.

+ Add Filter

Code	Name	Total Quantity	Total Sales Amount	INSTITUTION	INTERCO...	LARGE	MEDIUM	PRIVATE	SMALL
10	Europe								
20	Europe North								
30	Europe North (EU)	-171,90	51 730,06			-139,00	-12 762,41		-14 664,01
40	Europe North (Non EU)	-24,00	17 080,83				-2 935,40		-8 832,60
45	Europe North, Total	-195,90	68 810,89			-139,00	-15 697,81		-23 496,61
50	Europe South								
55	Europe, Total	-195,90	68 810,89			-139,00	-15 697,81		-23 496,61
60	America								
70	America North	-16,00	1 499,02			-1 193,90			
80	America South								
85	America, Total	-16,00	1 499,02			-1 193,90			

