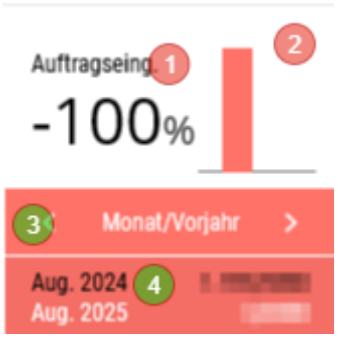
Order value

Title	Widget	Widget description
Order intake		1. Change in % 2. Change graphically 3. Switch between display variants "Month" | "Month / Previous year" | "Year" | "Financial year". The last selected variant is saved and preselected at the next start. 4. Display of concrete figures based on the selection from 3. Instead of turnover data, order-related (Order value) data are displayed Available: • Customer details Click: • Switches to the detail view Widget colouring: • red: Order value negative • green: Order value positive The data refer only to customers assigned to an agent.

General

Kebab menu (⋮)

Type	Menu item	Explanation
◉	Year	
◉	Financial year	only visible if Financial year <> Year

Type	Menu item	Explanation
◉	KEY DATE	
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	product hierarchy	

	Export	
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	all clients	only on the homepage dashboard only if more than one client exists only if not in the product hierarchy view
	<Client>	only on the homepage dashboard only if more than one client exists

Header

1. The chart display can be switched between Line diagram and Bar diagram
2. The colour gradients are controlled via the backend
3. If the chart is opened and not all time periods can be displayed, the display scrolls to the left to make the current time period (e.g. month) visible. Further time periods can be made visible by scrolling

General Information

1. The total row of the table is always displayed at the bottom edge of the display
2. The scale of the Y-axis is dynamically calculated and is based on the highest value of the data to be displayed

Grid

Click	Swipe	Views
	1. By swiping you reach the document view with a preset filter. 2. There are 3 swipe selections Documents <Current year> Documents <Last year> Documents <Two years ago>	1. Table

Filter

1. In the filter, the evaluation period (start and end) can be selected.
    a. The evaluation period can be a maximum of 1 year.
2. The filter applies equally to chart and table.
3. Automatic selection of the period
    a. If the selected period contains less than 32 days, the period corresponds to "Day"
    b. If the selected period contains less than 93 days, the period corresponds to "Week"
    c. In all other cases, the period corresponds to "Month".

Tabular display

Name	Explanation
Period	The period for which the data is filtered is displayed "Day" | "Week" | "Month"
Year columns	• 4-digit Year • Three year columns are displayed. At least as many as the individually selected evaluation period covers in years.
Change columns	% change compared to the comparison period

Chart display

1. The chart always shows a maximum of three value lines/bars.
a. Each line/bar represents a calendar or financial year.
    Current year = colour gradients: Basic configuration \ Settings \ Client chart colour for current year
    1 year back = colour gradients: Basic configuration \ Settings \ Client chart colour for last year

2 years back = colour gradients: Basic configuration \ Settings \ Client chart colour for two years ago

If an individual period requires the display of more than three years, only the newest three years are displayed.

Product hierarchy view

1. In the product hierarchy view, the turnover is displayed per product hierarchy level.
    a. The column "Month" is omitted and replaced by the product hierarchy.
2. If a row is selected in the view, the chart shows the turnover of the selected product hierarchy.
    a. The displayed turnover is determined from the selected hierarchy and the subordinate levels.
    b. If no row is selected, the total turnover is displayed.
3. Rows behind which products are located are marked with a green bar.
4. Swipe
    a. Products
5. Tripplepoint
    a. Client selection

Products

Lists the products located in the product hierarchy and the subordinate levels with turnover and sales quantity.

Name	Visible	Sort	Full Text	Explanation
Product	VisibleOnlyLandscape		Yes	
Name	Visible	ASC		
Hierarchy	Hidden			
Quantity <Current year>	VisibleOnlyLandscape			
Turnover <Current year>	Visible			
Quantity <Last year>	VisibleOnlyLandscape			
Turnover <Last year>	Visible			
Quantity <Two years ago>	VisibleOnlyLandscape			

Name	Visible	Sort	Full Text	Explanation
Turnover <Two years ago>	Visible			

Export

When exporting, an Excel document is created. The Excel document contains on sheet 1 (Name: Chart) a screenshot of the chart, as well as the data for the evaluation period.

On sheet 2 (Name: Data) a table with the corresponding data.

FAQ

Release

Revision #9
Created 2026-08-31 10:11:49 UTC by n8n
Updated 2026-09-02 14:51:14 UTC by n8n