
SALES ANALYSIS



AddonSoftware

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Introduction

Overview

Congratulations on your purchase of the **AddonSoftware** Sales Analysis module. This manual introduces you to the capabilities of the software, helps you install and operate the software with the guidance of your dealer, provides processing instructions, and serves as a reference guide for all menu tasks and data entry fields. The manual is divided into four main sections.

Introduction

This section consists of an overview of the Sales Analysis features and a list of standard reports and registers. A software registration form is also included that should be filled out and returned directly to **AddonSoftware**.

Installation

This section provides information that helps you and your dealer install the software. Instructions for gathering the required information, making decisions about system parameters, and entering the information are included. Data collection forms end the Installation section.

Operations

This section contains descriptions and instructions for operating each Sales Analysis task. Each task is explained in the order it appears in the standard software, with descriptions of each field and prompt.

Appendix

The appendix contains copies of Sales Analysis reports.

Required and Optional Modules

Required systems, included in the **AddonSoftware Administrator** module, are necessary for the operation of every **AddonSoftware** module. The *Administrator* module is provided with your first-time purchase of any **AddonSoftware** product.

The **AddonSoftware Order/Invoice Processing** module is *required* for the operation of Sales Analysis because the data used to generate the Sales Analysis reports comes from Order/Invoice Processing. And, because the **AddonSoftware Inventory Control** and Accounts Receivable modules are required for the operation of Order/Invoice Processing, these modules must also be installed.

If you intend to use the **AddonSoftware General Ledger** module in conjunction with Sales Analysis, the General Ledger module must be installed first. However, it is *not* necessary that the General Ledger be fully operational with up-to-date, live figures before installing and operating Sales Analysis, since the Sales Analysis module does not directly interface to the General Ledger module.

When several **AddonSoftware** modules are to be used, your dealer will help determine the best installation sequence.

Features and Benefits

The following descriptions of the standard features included with the software shows how each is used in the Sales Analysis module. In addition to these standard features, many of which are parameterized options within the module, you can make custom modifications to the software to tailor it to your needs.

Integrated to Order/Invoice Processing

Information is automatically updated to the Sales Analysis module after each invoice in the **AddonSoftware** Order/Invoice Processing module is printed and the **Daily Sales Register** run.

Screen Display or Report Formats

All sales analysis information can be displayed on-screen or printed by report.

Current and Prior Year History

Information is retained for each period of the *current* and *prior year*. Sales dollars, units, and costs are kept for each period. Gross profit margin (dollars and percentage) is calculated on all Sales Analysis reports.

Sales by Customer

Sales analysis data can be collected for all or selected customers. The collected data is summarized by product category or maintained in detail by inventory item within product category.

Sales by Salesperson

All sales are summarized by product category for each salesperson in a management report showing their individual performances over the past 24 months.

Sales by Territory

All sales are summarized by product category for each territory showing which types of products moved best in each geographic area.

Sales by Product

For each inventory item, sales analysis is maintained by individual inventory item within product category, or summarized by product category. With this capability, you control the amount of disk storage space allocated to sales analysis information, based on the importance for each product.

Sales by Profit Center or Department

By associating a distribution code with each customer and invoice, sales information can be collected and reported by profit center or department. At a glance you can see up to 24 months of sales history by store, department, or profit center, *without* having to review financial statements.

Sales by Customer Type

By dividing the customer base into various types, sales statistics can be built for each customer type group and product code combination.

Sales by Customer within Territory

This report provides sales and cost of goods sold figures for each territory and customer within a territory, showing not only the largest accounts, but also the most profitable.

Salesperson Commission Statement

A detailed commission statement is printed for each salesperson for the current period or any prior period that remains open. Each invoice sold by the salesperson during the period is shown on the statement. The commission statement can be based on booked or paid invoices.

Sales Analysis Parameter Maintenance

Whether or not sales analysis information is collected for each method is controlled by a set of parameters. This allows you to decide which information to collect or omit based on your specific needs and available disk storage.

Selective Sales Analysis Record Purge

You may selectively purge sales analysis records based on criteria, such as current year activity, prior year activity, customer type, product type, salesperson, and so forth. This provides a method of clearing unwanted sales history based on your specific requirements.

Reports

The Sales Analysis module also includes a full range of reports that provide up-to-date information about your sales analysis information. Each report offers several options and various levels of detail. The standard reports are:

- SA by Customer
- SA by Territory
- SA by Salesperson
- SA by Customer Type
- SA by Customer Ship-To
- SA by SIC
- SA by Product
- SA by Warehouse
- SA by Stocking Vendor
- SA by Distribution Code
- SA by Non-Stock Item
- SA by Product/Item/Customer
- SA by Territory/Customer

Each report and register is described in the **Operation** section of this manual and sample copies are shown in Appendix A. In addition to the standard report features, your dealer can customize the software to tailor reports to your exact needs.

A Word to the User

AddonSoftware wants to keep you updated! Periodic enhancements are made to the software and we want you to know about them. To register your software, fill out the **Software Registration Form** on the next page and send it to **AddonSoftware** at the *registration* address shown below.

We also want to keep our documentation as up to date and relevant as possible. If procedures are missing or not detailed enough for you, they may also be lacking for someone else. Please send us a note describing the problem or question to the *documentation* address shown below.

A **Product Suggestion Form** is also provided for you to document suggestions for enhancing our software to make it as relevant to you as possible. We value and welcome your suggestions.

For registration:

AddonSoftware

Sales Services

15050 SW Koll Parkway, Suite C

Beaverton, OR 97006

For documentation changes or product suggestions:

AddonSoftware

15050 SW Koll Parkway, Suite C

Beaverton, OR 97006

FAX: 503-643-1386

Attn: Product Development

Software Registration Form

Sales Analysis Module

To ensure that you receive available updates to your **AddonSoftware** and other important information, register your software by filling out this form and returning it to the address found on the reverse side. Your dealer can help you complete the form.

Your **AddonSoftware** Dealer's Name _____

Your Company Name _____

Address _____

City _____ State _____ Zip _____

Telephone (_____) _____

Your name _____

Title _____ Date _____

Please describe your primary business _____

Number of Employees _____

Computer Type and Model _____

Other software used _____

Comments _____

AddonSoftware
Sales Services
15050 SW Koll Parkway, Suite C
Beaverton, OR 97006

Remove from binder, fill out other side, fold and mail to address above.

Installation

Overview

The Installation section of this manual provides you with the information needed to convert from your existing system to the **AddonSoftware** Sales Analysis module. The care you take in planning the installation influences the overall results you obtain from it. Generally, your **AddonSoftware** dealer should manage the installation and setup of the software.

The installation process involves four major steps:

Step One

Prepare your facility before the physical installation of your computer equipment, and order any necessary forms and supplies. These items are explained in this section and make the work that follows much easier.

Step Two

Gather the information required for the operation of the Sales Analysis module. If desired, this can be done before the actual installation of the programs and data files. Determine whether sales analysis data should be collected for each customer and inventory item, and whether it is to be collected in summary or detail form. An important part of this step is deciding how the parameters will be set.

Step Three

Load the Sales Analysis tasks onto your computer as per the *Media Installation Instructions* shipped with the module diskettes. This step may be performed by your dealer before you take delivery of the equipment. If the **AddonSoftware** Order/Invoice Processing, Inventory Control, and Accounts Receivable modules are not already in use, these modules must also be installed.

Step Four

Enter the information you gathered in Step 2 into the Sales Analysis module.

Read this section before starting work and consult with the person managing your software installation if you do not understand some of the instructions. Each software installation step must be performed carefully and thoroughly so that the Inventory Control module produces the desired results and interfaces to other **AddonSoftware** modules correctly.

If the installation process seems like a lot of work, remember that you need go through it only once. After your company's sales analysis is converted to the module system, you will find the reporting of your sales analysis information requires much less work than a manual system.

Gathering the Information

After an order is entered, invoiced, and printed via the **AddonSoftware** Order/Invoice Processing module, the *Sales Register* task of that module creates records for the Sales Analysis reports. It is very important to understand that only the act of updating the Sales Register causes sales analysis data to be created.

In addition, sales analysis data is created according to the setup of the Sales Analysis parameters, the Accounts Receivable customer records, and the Inventory Control item records *at the time of the Sales Register update*. The Sales Analysis tasks simply print the data already collected, and changing the setup of the files prior to printing does not have any impact on the reporting of previously-collected data.

CAUTION: If records that govern the way Sales Analysis data is collected are changed in the middle of a reporting period, the data on the resulting reports can be extremely confusing.

Refer to the **Operations** section of this manual and the **AddonSoftware** Accounts Receivable and Inventory Control manuals to learn how to enter the parameters and other setup information.

Sales Analysis Information Checklist

- ___ Define Sales Analysis Parameters
- ___ Determine Customer Data Collection Level
- ___ Determine Inventory Item Data Collection Level

Define Sales Analysis Parameters

The setting of the Sales Analysis parameters determines which data is collected for your sales analysis reporting purposes. Each parameters can be set for different levels of analysis. Determine the type of reporting required by each company using the system.

Sales Analysis by Customer

Use this parameter to collect data for the Sales Analysis by Customer report, the Sales Analysis by Customer within Territory report, and the Sales Analysis by Product/Item/Customer report.

Sales Analysis by Customer Type

This parameter enables you to collect data for the Sales Analysis by Customer Type report, which shows the amount of sales by customer type.

Sales Analysis by Customer Ship-To

This parameter enables you to collect data for the Sales Analysis by Customer Ship-To report, which shows the amount of sales according to shipping requirements.

Sales Analysis by Territory

This parameter enables you to collect data for the Sales Analysis by Territory report and the Sales Analysis by Customer within Territory report, which shows the amount of sales within a certain territory.

Sales Analysis by Salesperson

Use this parameter to collect data for the Sales Analysis by Salesperson report, which shows the amount of sales by your sales staff.

Sales Analysis by Customer SIC

This parameter enables you to collect data for the Sales Analysis by Customer SIC report, which shows the amount of sales by SIC codes.

Sales Analysis by Distribution Code

This parameter enables you to collect data for the Sales Analysis by Distribution Code report, which shows the amount of sales by distribution codes.

Sales Analysis by Product Type

This parameter enables you to collect data for the Sales Analysis by Product report and the Sales Analysis by Product/Item/Customer report, which show the amount of sales by product type, item, and customer codes.

Sales Analysis by Stocking Vendor

This parameter enables you to collect data for the Sales Analysis by Stocking Vendor report, which shows the amount of sales by vendors.

Sales Analysis by Non-Stock Item

This parameter enables you to collect data for the Sales Analysis by Non-Stock Item report, which shows the amount of non-stock item sales.

Sales Analysis by Warehouse

This parameter enables you to collect data for the Sales Analysis by Warehouse report, which shows the amount of sales by warehouse.

Determine Customer Data Collection Level

If data is collected for sales analysis by customer, territory, or product/item/customer, you must decide for which customers you will collect the sales analysis data, and whether the data for each should be collected by individual inventory item or summarized by product.

Print a report that lists each customer, such as the **Customer Name Listing** from Accounts Receivable, and mark each customer with a code to indicate how this customer's data will be collected.

Determine Inventory Item Data Collection Level

If data is collected for sales analysis by product or product/item/customer, you must decide for which inventory items you will collect sales analysis data, and whether the data for each should be reported by individual inventory item or summarized by product.

Print a report that lists each inventory item, such as the **Inventory Listing by Alpha Sequence**, and mark each item with a code to indicate how the data for the item should be collected

Entering the Information

Now that you have gathered the information, you are ready to enter it into the module. Refer to the **Operations** section of this manual for detailed information on each task referenced.

1. Use the Sales Analysis *Parameter Maintenance* task to enter your parameters for each type of sales analysis, including the detail level.
2. Use the Accounts Receivable *Customer Maintenance* task to enter the customer sales analysis codes.
3. Use the Inventory Control *Inventory Item Maintenance* task to enter sales analysis codes for the inventory items.

Installation/Training Schedule

	Target	Completed
Pre-Installation Review:	_____	_____
<i>Signature</i> _____		
Information Review:	_____	_____
<i>Signature</i> _____		
Conversion Training:	_____	_____
<i>Signature</i> _____		
Conversion Review:	_____	_____
<i>Signature</i> _____		
Daily Processing Training:	_____	_____
<i>Signature</i> _____		
Period End Training:	_____	_____
<i>Signature</i> _____		
Installation Complete:	_____	_____
<i>Signature</i> _____		

Flow of Processing

Overview

The Flow of Processing section in other **AddonSoftware** manuals helps you learn how to operate the software for the first time and provides guidelines for operating the module after it is installed. However, in Sales Analysis all the work is done for you by the system.

The Sales Order/Invoice Processing module automatically generates and updates sales analysis information each time the Order/Invoice Processing **Sales Register** is updated. The only other processing that may become necessary is the removing of zero balance sales analysis records. If this is required, use the *Purge Zero Balance Records* task on the Sales Analysis **Period End Processing Menu**.

Operations

Overview

The Operations section contains descriptions of the Sales Analysis tasks. A sample of each screen is shown, each field is described, and the operation of each task is explained. Use this section as a reference when using the Sales Analysis module. Examples of the reports generated by these tasks appear in Appendix A.

For a complete understanding of the Sales Analysis module, study the **Introduction** and **Installation** sections in conjunction with the Operations section.

The tasks in this section are organized according to their order of appearance on the menu in a standard installation of the software. Because you can customize **AddonSoftware** menus, the appearance and function of your Sales Analysis module may vary slightly from the descriptions in the manual. For instructions on how to use menus in the **AddonSoftware** system, refer to the **AddonSoftware Administrator** manual.

About the Sales Analysis Tasks

Tasks in Sales Analysis are grouped into areas of operation. The overall purpose of the module's tasks is for sales reporting and inquiry generation, with a couple of tasks for setting parameters and purging old data. All reports are grouped together on a subsidiary menu. The main menu displays the inquiries and the menus that hold the remaining tasks.

Sales Analysis Main Menu

ADD+ON Demonstration Company SAS Sales Analysis	ADD+ON Software v6.0.0 11/15/95 09:02 AM T030 PF
Sales Analysis	
<ol style="list-style-type: none">1. Sales Analysis By Customer2. Sales Analysis By Territory3. Sales Analysis By Salesperson4. Sales Analysis By Customer Type5. Sales Analysis By Customer Ship-To6. Sales Analysis By SIC7. Sales Analysis By Product8. Sales Analysis By Warehouse9. Sales Analysis By Stocking Vendor10. Sales Analysis By Distribution Code11. Sales Analysis By Non-Stock Item12. Sales Analysis By Product/Item/Cust13. Sales Analysis Reports Menu14. Period End Processing Menu15. Sales Analysis Maintenance Menu	
Enter An Option (On/Off/Date/Menu)[_____]	
F1=Reports F3=Company F5=SpeedSearch F6=Help ADD+ON Software (c) 1995	

Sales Analysis Main Menu

Function

The main menu provides access to all the tasks of the Sales Analysis module, including subsidiary menus.

- *To access this menu...*

Select **Sales Analysis** from the **AddonSoftware Main Menu**.

Sales Analysis By Customer

ADD+ON Demonstration Company SAM.AA Sales Analysis By Customer				ADD+ON Software v6.0.0 11/15/95 09:03 AM T030 PF		
Customer: 00-0100 Everest Industries						
Product Type: *** Summary ***						
Item: ***** Summary *****						
Fiscal 1995			Fiscal 1994			
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	102	5866.35	2853.72	29	643.00	640.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	36	2615.00	858.33	0	0.00	0.00
7 Jul	0	0.00	0.00	12	810.00	653.40
8 Aug	0	0.00	0.00	0	0.00	0.00
9 Sep	0	0.00	0.00	30	170.00	89.30
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	138	8481.35	3712.05	92	1729.00	1480.20
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By Customer

Function

This task provides an inquiry into current and prior year sales history of units, sales, and costs for a particular customer. Depending on how you set the *Sales Analysis By Customer* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Customer** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Customer field...

- Enter the customer number.
 - or-
 - Press **F1** to select from customers with sales analysis.
 - or-
 - Press **F3** to select from a list of customer numbers.
 - or-
 - Press **F4** to return to the **Sales Analysis Main Menu**.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected customer.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected customer and product.

The inquiry for the customer/product/item is displayed.

- Press **F1** to view the next product/item on record for this customer.
 - or-
 - Press **Return** to access the *Customer* field.

Sales Analysis By Territory

ADD+ON Demonstration Company SAM.BA Sales Analysis By Territory				ADD+ON Software v6.0.0 11/15/95 09:04 AM T030 PF		
Territory: 001 Western U.S. Product Type: *** Summary ***						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	75	5532.00	2671.65	32	1193.00	978.24
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	35	2596.50	851.44	0	0.00	0.00
7 Jul	0	0.00	0.00	94	5379.00	2948.06
8 Aug	0	0.00	0.00	2-	400.00-	162.26-
9 Sep	25	1653.25	483.52	200	1747.50	855.25
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	135	9781.75	4006.61	345	8025.50	4716.79
<F1>=Display Next Record				<Enter>=Continue [_____]		

Sales Analysis By Territory

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular territory. Depending on how you set the *Sales Analysis By Territory* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Territory** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below. The inquiry displays after the field entries.

In the Territory field...

- Enter the territory number.
 - or-
 - Press **F1** to select from territories with sales analysis.
 - or-
 - Press **F3** to select from a list of territory numbers.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected territory.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected territory and product.

The inquiry for the territory/product/item is displayed.

- Press **F1** to view the next product/item on record for this territory.
 - or-
 - Press **Return** to access the *Territory* field.

Sales Analysis By Salesperson

ADD+ON Demonstration Company SAM.CA Sales Analysis By Salesperson				ADD+ON Software v6.0.0 11/15/95 09:06 AM T030 PF		
Salesperson: JDP Judy D. Peterson						
Product Type: *** Summary ***						
Item: ***** Summary *****						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	75	5532.00	2671.65	29	643.00	640.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	35	2596.50	851.44	0	0.00	0.00
7 Jul	0	0.00	0.00	19	891.50	698.19
8 Aug	0	0.00	0.00	2-	400.00-	162.26-
9 Sep	0	0.00	0.00	170	1167.50	495.15
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	110	8128.50	3523.09	237	2408.00	1768.58
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By Salesperson

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular salesperson. Depending on how you set the *Sales Analysis By Salesperson* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Salesperson** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below. The inquiry displays after the field entries.

In the Salesperson field...

- Enter the salesperson number.
 - or-
 - Press **F1** to select from salespersons with sales analysis.
 - or-
 - Press **F3** to select from a list of salesperson numbers.
 - or-
 - Press **F4** to return to the **Sales Analysis Main Menu**.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected salesperson.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected salesperson and product.

The inquiry for the salesperson/product/item is displayed.

- Press **F1** to view the next product/item on record for this salesperson.
 - or-
 - Press **Return** to access the *Salesperson* field.

Sales Analysis By Customer Type

ADD+ON Demonstration Company SAM.DA Sales Analysis By Customer Type				ADD+ON Software v6.0.0 11/15/95 09:08 AM T030 PF		
Customer Type: A Dealer						
Product Type: *** Summary ***						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	75	5532.00	2671.65	29	643.00	640.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	35	2596.50	851.44	0	0.00	0.00
7 Jul	0	0.00	0.00	19	891.50	698.19
8 Aug	0	0.00	0.00	0	0.00	0.00
9 Sep	0	0.00	0.00	170	1167.50	495.15
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	110	8128.50	3523.09	239	2808.00	1930.84
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By Customer Type

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular customer type. Depending on how you set the *Sales Analysis By Customer Type* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Customer Type** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Customer Type field...

- Enter the customer type.
 - or-
 - Press **F1** to select from customer types with sales analysis.
 - or-
 - Press **F3** to select from a list of customer types.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected customer type.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected customer type and product.

The inquiry for the customer type/product/item is displayed.

- Press **F1** to view the next product/item on record for this customer type.
 - or-
 - Press **Return** to access the *Customer Type* field.

Sales Analysis By Customer Ship-To

ADD+ON Demonstration Company SAM.EA Sales Analysis By Customer Ship-To				ADD+ON Software v6.0.0 11/15/95 09:10 AM T030 PF		
Customer: 00-0100 Everest Industries						
Customer Ship-To: ***** Summary *****						
Item: ***** Summary *****						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	102	5866.35	2853.72	29	643.00	640.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	36	2615.00	858.33	0	0.00	0.00
7 Jul	0	0.00	0.00	12	810.00	653.40
8 Aug	0	0.00	0.00	0	0.00	0.00
9 Sep	0	0.00	0.00	30	170.00	89.30
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	138	8481.35	3712.05	92	1729.00	1480.20
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By Customer Ship-To

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular customer ship-to. Depending on how you set the *Sales Analysis By Customer Ship-To* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Customer Ship-To** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Customer field...

- Enter the customer number.
 - or-
 - Press **F1** to select from customers with sales analysis.
 - or-
 - Press **F3** to select from a list of customer numbers.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Customer Ship-To field...

- Enter the ship-to location.
 - or-
 - Press **F1** to select from customer ship-tos with sales analysis.
 - or-
 - Press **F3** to select from a list of ship-to locations.
 - or-
 - Press **F4** to view a summary of all ship-tos/items for the selected customer.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected customer and product.

The inquiry for the customer ship-to/product/item is displayed.

- Press **F1** to view the next ship-to/item on record for this customer.
 - or-
 - Press **Return** to access the *Customer* field.

Sales Analysis By SIC

ADD+ON Demonstration Company SAM.FA Sales Analysis By SIC				ADD+ON Software v6.0.0 11/15/95 09:12 AM T030 PF		
SIC: 1X2X3X4X Unknown SIC						
Product Type: *** Summary ***						
Item: ***** Summary *****						
Fiscal 1995			Fiscal 1994			
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	39	5181.00	2504.61	3	575.00	380.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	15	72.00	45.00
6 Jun	26	2537.50	766.44	0	0.00	0.00
7 Jul	0	0.00	0.00	12	810.00	653.40
8 Aug	0	0.00	0.00	0	0.00	0.00
9 Sep	0	0.00	0.00	30	170.00	89.30
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	65	7718.50	3271.05	60	1627.00	1167.70
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By SIC

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular SIC number. Depending on how you set the *Sales Analysis By SIC* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By SIC** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the SIC field...

- Enter the SIC number.
 - or-
 - Press **F1** to select from SICs with sales analysis.
 - or-
 - Press **F3** to select from a list of SIC numbers.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected SIC.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected SIC and product.

The inquiry for the SIC/product/item is displayed.

- Press **F1** to view the next product/item on record for this SIC.
 - or-
 - Press **Return** to access the *SIC* field.

Sales Analysis By Product

ADD+ON Demonstration Company SAM.GA Sales Analysis By Product				ADD+ON Software v6.0.0 11/15/95 09:16 AM T030 PF		
Product Type: C Components						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	15	1679.00	331.00	0	0.00	0.00
2 Feb	0	0.00	0.00	8	943.00	230.00
3 Mar	0	0.00	0.00	0	0.00	0.00
4 Apr	6	769.00	132.00	5	1775.00	531.00
5 May	6	769.00	132.00	0	0.00	0.00
6 Jun	0	0.00	0.00	0	0.00	0.00
7 Jul	0	0.00	0.00	0	0.00	0.00
8 Aug	15	1553.00	331.00	40	21441.00	5690.00
9 Sep	0	0.00	0.00	0	0.00	0.00
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	42	4770.00	926.00	53	24159.00	6451.00
Is The Above Information Correct (Y/N/Delete/<F1>=Next Record)? [_____]						

Sales Analysis By Product

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular product. Depending on how you set the *Sales Analysis By Product* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Product** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one or both of the fields below.

In the Product Type field...

- Enter the product type.
-or-
Press **F1** to select from product types with sales analysis.
-or-
Press **F3** to select from a list of product types.

In the Item field...

- Enter the item number.
-or-
Press **F1** to select from items with sales analysis.
-or-
Press **F3** to select from a list of item numbers.
-or-
Press **F4** to view a summary of all items for the selected product.

The inquiry for the product type/item is displayed.

- Press **F1** to view the next item on record for this product type.
-or-
Press **Return** to access the *Product Type* field.

Sales Analysis By Warehouse

ADD+ON Demonstration Company SAM.HA Sales Analysis By Warehouse				ADD+ON Software v6.0.0 11/15/95 09:18 AM T030 PF		
Warehouse: 01 Mission Viejo						
Product Type: *** Summary ***						
Item: ***** Summary *****						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	75	5532.00	2671.65	32	1193.00	978.24
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	35	2596.50	851.44	0	0.00	0.00
7 Jul	0	0.00	0.00	94	5379.00	2948.06
8 Aug	0	0.00	0.00	2-	400.00-	162.26-
9 Sep	25	1653.25	483.52	200	1747.50	855.25
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	135	9781.75	4006.61	345	8025.50	4716.79
<F1>=Display Next Record				<Enter>=Continue [_____]		

Sales Analysis By Warehouse

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular warehouse. Depending on how you set the *Sales Analysis By Warehouse* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Warehouse** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Warehouse field...

- Enter the warehouse number.
 - or-
 - Press **F1** to select from warehouses with sales analysis.
 - or-
 - Press **F3** to select from a list of warehouse numbers.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected warehouse.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected warehouse and product.

The inquiry for the warehouse/product/item is displayed.

- Press **F1** to view the next product/item on record for this warehouse.
 - or-
 - Press **Return** to access the *Warehouse* field.

Sales Analysis By Stocking Vendor

ADD+ON Demonstration Company SAM.1A Sales Analysis By Stocking Vendor				ADD+ON Software v6.0.0 11/15/95 09:24 AM T030 PF		
Vendor: 000100 Paramount Industries						
Product Type: *** Summary ***						
Item: ***** Summary *****						
Fiscal 1995			Fiscal 1994			
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	9	49.50	12.96	26	68.00	260.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	11	48.00	58.50
6 Jun	0	0.00	0.00	0	0.00	0.00
7 Jul	0	0.00	0.00	0	0.00	0.00
8 Aug	0	0.00	0.00	0	0.00	0.00
9 Sep	0	0.00	0.00	0	0.00	0.00
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	9	49.50	12.96	37	116.00	318.50
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By Stocking Vendor

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular stocking vendor. Depending on how you set the *Sales Analysis By Stocking Vendor* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Stocking Vendor** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Vendor field...

- Enter the vendor number.
-or-
Press **F1** to select from vendors with sales analysis.
-or-
Press **F3** to select from a list of vendor numbers.
-or-
Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Product Type field...

- Enter the product type.
-or-
Press **F1** to select from product types with sales analysis.
-or-
Press **F3** to select from a list of product types.
-or-
Press **F4** to view a summary of all products/items for the selected vendor.

In the Item field...

- Enter the item number.
-or-
Press **F1** to select from items with sales analysis.
-or-
Press **F3** to select from a list of item numbers.
-or-
Press **F4** to view a summary of all items for the selected vendor and product.

The inquiry for the vendor/product/item is displayed.

- Press **F1** to view the next product/item on record for this vendor.
-or-
Press **Return** to access the *Vendor* field.

Sales Analysis By Distribution Code

ADD+ON Demonstration Company				ADD+ON Software v6.0.0		
SAM.JA Sales Analysis By Distribution Code				11/15/95 09:36 AM T030 PF		
Distribution Code: A1 Product A Location 1						
Product Type: *** Summary ***						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	34	1500.00	54.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	75	5532.00	2671.65	26	68.00	260.00
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	21	106.00	97.50
6 Jun	35	2596.50	851.44	0	0.00	0.00
7 Jul	0	0.00	0.00	19	891.50	698.19
8 Aug	0	0.00	0.00	2-	400.00-	162.26-
9 Sep	0	0.00	0.00	110	510.00	183.80
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	144	9628.50	3577.09	174	1175.50	1077.23
<F1>=Display Next Record				<Enter>=Continue [_____]		

Sales Analysis By Distribution Code

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a particular distribution code. Depending on how you set the *Sales Analysis By Distribution Code* parameter, this inquiry can display sales analysis information down to the item level.

- To access this task...

Select **Sales Analysis By Distribution Code** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Distribution Code field...

- Enter the distribution code.
 - or-
 - Press **F1** to select from distribution codes with sales analysis.
 - or-
 - Press **F3** to select from a list of distribution codes.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to view a summary of all products/items for the selected distribution code.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items for the selected distribution code and product.

The inquiry for the distribution code/product/item is displayed.

- Press **F1** to view the next product/item on record for this distribution code.
 - or-
 - Press **Return** to access the *Distribution Code* field.

Sales Analysis By Non-Stock Item

ADD+ON Demonstration Company SAM.KA Sales Analysis By Non-Stock Item				ADD+ON Software v6.0.0 11/15/95 09:45 AM T030 PF		
Product Type: A Accessories Non-Stock Item: 6A57732 Rear Seat						
Fiscal 1995				Fiscal 1994		
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	4	832.00	121.00	0	0.00	0.00
2 Feb	0	0.00	0.00	6	1188.00	150.00
3 Mar	5	1040.00	151.00	0	0.00	0.00
4 Apr	15	3120.00	454.00	0	0.00	0.00
5 May	0	0.00	0.00	0	0.00	0.00
6 Jun	0	0.00	0.00	9	1782.00	225.00
7 Jul	0	0.00	0.00	0	0.00	0.00
8 Aug	0	0.00	0.00	30	5940.00	750.00
9 Sep	0	0.00	0.00	0	0.00	0.00
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	24	4992.00	726.00	45	8910.00	1125.00
Is The Above Information Correct (Y/N/Delete/<F1>=Next Record)? [_____]						

Sales Analysis By Non-Stock Item

Function

This task enables an inquiry into current and prior year sales history of units, sales, and cost for items you do not keep in stock. Depending on how you set the *Sales Analysis By Non-Stock Item* parameter, this inquiry can display sales analysis of product and non-stock item.

- To access this task...

Select **Sales Analysis By Non-Stock Item** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one or both of the fields below.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.

In the Non-Stock Item field...

- Enter the non-stock item number.
 - or-
 - Press **F1** to select from non-stock items with sales analysis.
 - or-
 - Press **F3** to select from a list of non-stock item numbers.
 - or-
 - Press **F4** to view a summary of all non-stock items for the selected product.

The inquiry for the product/non-stock item is displayed.

- Press **F1** to view the next non-stock item on record for this product.
 - or-
 - Press **Return** to access the *Product Type* field.

Sales Analysis By Product/Item/Customer

ADD+ON Demonstration Company SAM.LA Sales Analysis By Product/Item/Cust				ADD+ON Software v6.0.0 11/15/95 09:46 AM T030 PF		
Product Type: C Components						
Item: ***** Summary *****						
Customer: ***** Summary *****						
Fiscal 1995			Fiscal 1994			
Period	Units	Sales	Cost	Units	Sales	Cost
1 Jan	0	0.00	0.00	0	0.00	0.00
2 Feb	0	0.00	0.00	0	0.00	0.00
3 Mar	84	4660.35	2692.80	6	1125.00	718.24
4 Apr	0	0.00	0.00	0	0.00	0.00
5 May	0	0.00	0.00	0	0.00	0.00
6 Jun	6	607.00	343.77	0	0.00	0.00
7 Jul	0	0.00	0.00	48	1260.00	770.84
8 Aug	0	0.00	0.00	2-	400.00-	162.26-
9 Sep	0	0.00	0.00	0	0.00	0.00
10 Oct	0	0.00	0.00	0	0.00	0.00
11 Nov	0	0.00	0.00	0	0.00	0.00
12 Dec	0	0.00	0.00	0	0.00	0.00
Totals	90	5267.35	3036.57	52	1985.00	1326.82
<F1>=Display Next Record <Enter>=Continue [_____]						

Sales Analysis By Product/Item/Customer

Function

This task enables an inquiry into current and prior year sales history of units, sales, and costs for a combination of product, item, and customer. You can view the movement of your product and items and determine which customer is purchasing them.

- To access this task...

Select **Sales Analysis By Product/Item/Customer** from the **Sales Analysis Main Menu**.

About the Fields

The fields displayed on the screen are those pertaining to the level of detail you set for analysis in the *Parameter Maintenance* task. Your screen may display one, two, or all of the fields below.

In the Product Type field...

- Enter the product type.
 - or-
 - Press **F1** to select from product types with sales analysis.
 - or-
 - Press **F3** to select from a list of product types.
 - or-
 - Press **F4** to return to the ***Sales Analysis Main Menu***.

In the Item field...

- Enter the item number.
 - or-
 - Press **F1** to select from items with sales analysis.
 - or-
 - Press **F3** to select from a list of item numbers.
 - or-
 - Press **F4** to view a summary of all items/customers for the selected product.

In the Customer field...

- Enter the customer number.
 - or-
 - Press **F3** to select from a list of customer numbers.
 - or-
 - Press **F4** to view a summary of all customers for the selected item and product.

The inquiry for the product/item/customer is displayed.

- Press **F1** to view the next item/customer on record for this product.
 - or-
 - Press **Return** to access the *Product Type* field.

Sales Analysis Reports Menu

ADD+ON Demonstration Company SAR Sales Analysis Reports	ADD+ON Software v6.0.0 11/15/95 09:47 AM T030 PF
Sales Analysis Reports	
<ol style="list-style-type: none"> 1. Sales Analysis By Customer 2. Sales Analysis By Territory 3. Sales Analysis By Salesperson 4. Sales Analysis By Customer Type 5. Sales Analysis By Customer Ship-To 6. Sales Analysis By SIC 7. Sales Analysis By Product 8. Sales Analysis By Warehouse 9. Sales Analysis By Stocking Vendor 10. Sales Analysis By Distribution Code 11. Sales Analysis By Non-Stock Item 12. Sales Analysis By Product/Item/Cust 13. Sales Analysis By Territory/Cust 	
Enter An Option (On/Off/Date/Menu)[_____]	
F1=Reports F3=Company F5=SpeedSearch F6=Help ADD+ON Software (c) 1995	

Sales Analysis Reports Menu

Function

Use this menu to access a number of sales analysis reports. All reports come standard with the module and have various selection options. Your menu may contain additional reports, or have some reports removed, if your system was customized during installation.

- *To access this menu...*

Select **Sales Analysis Reports Menu** from the *Sales Analysis Main Menu*.

About the Sales Analysis Reports Menu Tasks

To access any task on this menu, enter the number assigned to the task in the *Enter An Option* field.

Use the tasks on this menu to print reports showing information that can help you manage your sales. The Sales Analysis By Salesperson report can aid you in determining which salesperson is bringing in the most business, while the Sales Analysis By Product/Item/Customer Report shows you how your product is selling and who is doing the buying. Other reports show sales analysis by SIC, warehouse, and so forth.

The reports in the Sales Analysis module all print and sort in the same manner, determined by the entries you make to the fields. Each report task has a *Sequence* field where you tell the module to sort the report information in an ascending, descending, or unsorted order. When you create a 12-period report by entering Y in the *12 Period Report* field, you have the option of basing the report on sales or units. The total sales or units are then sorted to the level of detail you select in the *Detail Level* field. If you enter N in the *12 Period Report* field, the sort is automatically based on sales of the detail level. The sort is further defined with the *MTD, YTD Or Prior* field, where you enter which reporting period appears first, second, and third on the report.

Since each report prints in the same manner, one sample of a 12-period report and one sample of a report based on sales is available in Appendix A. We used the *Sales Analysis By Customer* for both reports with the detail level set to item. Your reports will vary only by the title of the report, the level of detail you select, the order of the reporting period, and the figures generated. See Appendix A, pages 5-3 & 5-4, for samples of the report.

Sales Analysis By Customer

ADD+ON Demonstration Company SAR.AA Sales Analysis By Customer	ADD+ON Software v6.0.0 11/15/95 09:49 AM T030 PF
---	---

Period: 11 Nov
Year: 95
Detail Level: I Item
Sequence: U Unsorted
Beginning Customer: First
Ending Customer: Last
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Customer

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by customer. Depending on how you set the *Sales Analysis By Customer* parameter, this report can also display a sales analysis of products and items.

- *To access this task...*

Select **Sales Analysis By Customer** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **C** to print a report at the customer level.
-or-
Enter **P** to print a report at the customer and product level.
-or-
Enter **I** to print a report at the customer, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Customer field...

- Enter the number of the first customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Ending Customer field...

- Enter the number of the last customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, customer numbers display on the screen to show its progress.

Sales Analysis By Territory

ADD+ON Demonstration Company SAR.BA Sales Analysis By Territory	ADD+ON Software v6.0.0 11/15/95 09:51 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: P Product Type
Sequence: U Unsorted
Beginning Territory: First
Ending Territory: Last
Beginning Product Type: First
Ending Product Type: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Territory

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by territory. Depending on how you set the *Sales Analysis By Territory* parameter, this report can also display a sales analysis of products and items.

- *To access this task...*

Select **Sales Analysis By Territory** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **T** to print a report at the territory level.
-or-
Enter **P** to print a report at the territory and product level.
-or-
Enter **I** to print a report at the territory, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Territory field...

- Enter the number of the first customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Ending Territory field...

- Enter the number of the last customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, territory numbers display on the screen to show its progress.

Sales Analysis By Salesperson

ADD+ON Demonstration Company SAR.CA Sales Analysis By Salesperson	ADD+ON Software v6.0.0 11/15/95 09:52 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: I Item
Sequence: U Unsorted
Beginning Salesperson: First
Ending Salesperson: Last
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Salesperson

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by salesperson. Depending on how you set the *Sales Analysis By Salesperson* parameter, this report can also display a sales analysis of products and items.

- To access this task...

Select **Sales Analysis By Salesperson** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **S** to print a report at the salesperson level.
-or-
Enter **P** to print a report at the salesperson and product level.
-or-
Enter **I** to print a report at the salesperson, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Salesperson field...

- Enter the number of the first salesperson to appear on the report.
-or-
Press **F3** to select from a list of salesperson numbers.

In the Ending Salesperson field...

- Enter the number of the last salesperson to appear on the report.
-or-
Press **F3** to select from a list of salesperson numbers.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, salesperson numbers display on the screen to show its progress.

Sales Analysis By Customer Type

ADD+ON Demonstration Company SAR.DA Sales Analysis By Customer Type	ADD+ON Software v6.0.0 11/15/95 09:53 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: P Product Type
Sequence: U Unsorted
Beginning Customer Type: First
Ending Customer Type: Last
Beginning Product Type: First
Ending Product Type: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Customer Type

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by customer type. Depending on how you set the *Sales Analysis By Customer Type* parameter, this report can also display a sales analysis of products and items.

- *To access this task...*

Select **Sales Analysis By Customer Type** from the *Sales Analysis Reports Menu*.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **C** to print a report at the customer type level.
-or-
Enter **P** to print a report at the customer type and product level.
-or-
Enter **I** to print a report at the customer type, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Customer Type field...

- Enter the number of the first customer type to appear on the report.
-or-
Press **F3** to select from a list of customer types.

In the Ending Customer Type field...

- Enter the number of the last customer type to appear on the report.
-or-
Press **F3** to select from a list of customer types.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, customer types display on the screen to show its progress.

Sales Analysis By Customer Ship-To

ADD+ON Demonstration Company SAR.EA Sales Analysis By Customer Ship-To	ADD+ON Software v6.0.0 11/15/95 09:55 AM T030 PF
---	---

Period: 11 Nov
Year: 95
Detail Level: I Item
Sequence: U Unsorted
Beginning Customer: First
Ending Customer: Last
Beginning Customer Ship-To: First
Ending Customer Ship-To: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Customer Ship-To

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by customer ship-to. Depending on how you set the *Sales Analysis By Customer Ship-To* parameter, this report can also display a sales analysis of customers and items.

- *To access this task...*

Select **Sales Analysis By Customer Ship-To** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **S** to print a report at the customer ship-to level.
-or-
Enter **C** to print a report at the customer ship-to and customer level.
-or-
Enter **I** to print a report at the customer ship-to, customer, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Customer Ship-To field...

- Enter the location of the first customer ship-to to appear on the report.
-or-
Press **F3** to select from a list of locations.

In the Ending Customer Ship-To field...

- Enter the location of the last customer ship-to to appear on the report.
-or-
Press **F3** to select from a list of locations.

In the Beginning Customer field...

This field is accessible if you entered C or I in the Detail field.

- Enter the number of the first customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Ending Customer field...

- Enter the number of the last customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, ship-to numbers display on the screen to show its progress.

Sales Analysis By SIC

ADD+ON Demonstration Company SAR.FA Sales Analysis By SIC	ADD+ON Software v6.0.0 11/15/95 09:56 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: I Item
Sequence: U Unsorted
Beginning SIC: First
Ending SIC: Last
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By SIC

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by customer SIC. Depending on how you set the *Sales Analysis By Customer SIC* parameter, this report can also display a sales analysis of products and items.

- *To access this task...*

Select **Sales Analysis By SIC** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **C** to print a report at the customer SIC level.
-or-
Enter **P** to print a report at the customer SIC and product level.
-or-
Enter **I** to print a report at the customer SIC, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Customer SIC field...

- Enter the number of the first customer SIC to appear on the report.
-or-
Press **F3** to select from a list of customer SICs.

In the Ending Customer SIC field...

- Enter the number of the last customer SIC to appear on the report.
-or-
Press **F3** to select from a list of customer SICs.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, customer SIC numbers display on the screen to show its progress.

Sales Analysis By Product

ADD+ON Demonstration Company SAR.GA Sales Analysis By Product	ADD+ON Software v6.0.0 11/15/95 09:58 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: P Product Type
Sequence: U Unsorted
Beginning Product Type: First
Ending Product Type: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Product

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by product. Depending on how you set the *Sales Analysis By Product Type* parameter, this report can also display a sales analysis of items.

- To access this task...

Select **Sales Analysis By Product** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **P** to print a report at the product level.
-or-
Enter **I** to print a report at the product and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Product field...

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu** without printing the report.

Printing

As the report prints, product types display on the screen to show its progress.

Sales Analysis By Warehouse

ADD+ON Demonstration Company SAR.HA Sales Analysis By Warehouse	ADD+ON Software v6.0.0 11/15/95 09:59 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: I Item
Sequence: U Unsorted
Beginning Warehouse: First
Ending Warehouse: Last
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Warehouse

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by customer. Depending on how you set the *Sales Analysis By Warehouse* parameter, this report can also display a sales analysis of products and items within the warehouse.

- *To access this task...*

Select **Sales Analysis By Warehouse** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **W** to print a report at the warehouse level.
-or-
Enter **P** to print a report at the warehouse and product level.
-or-
Enter **I** to print a report at the warehouse, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Warehouse field...

- Enter the number of the first warehouse to appear on the report.
-or-
Press **F3** to select from a list of warehouse numbers.

In the Ending Warehouse field...

- Enter the number of the last warehouse to appear on the report.
-or-
Press **F3** to select from a list of warehouse numbers.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu** without printing the report.

Printing

As the report prints, warehouse numbers display on the screen to show its progress.

Sales Analysis By Stocking Vendor

ADD+ON Demonstration Company SAR.1A Sales Analysis By Stocking Vendor	ADD+ON Software v6.0.0 11/15/95 10:00 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: I Item
Sequence: U Unsorted
Beginning Vendor: First
Ending Vendor: Last
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Stocking Vendor

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by stocking vendor. Depending on how you set the *Sales Analysis By Stocking Vendor* parameter, this report can also display a sales analysis of products and items used by the vendor.

- To access this task...

Select **Sales Analysis By Stocking Vendor** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **V** to print a report at the vendor level.
-or-
Enter **P** to print a report at the vendor and product level.
-or-
Enter **I** to print a report at the vendor, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Vendor field...

- Enter the number of the first vendor to appear on the report.
-or-
Press **F3** to select from a list of vendor numbers.

In the Ending Vendor field...

- Enter the number of the last vendor to appear on the report.
-or-
Press **F3** to select from a list of vendor numbers.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, vendor numbers display on the screen to show its progress.

Sales Analysis By Distribution Code

ADD+ON Demonstration Company SAR.JA Sales Analysis By Distribution Code	ADD+ON Software v6.0.0 11/15/95 10:02 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: P Product Type
Sequence: U Unsorted
Beginning Distribution Code: First
Ending Distribution Code: Last
Beginning Product Type: First
Ending Product Type: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Distribution Code

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by distribution code. Depending on how you set the *Sales Analysis By Distribution Code* parameter, this report can also display a sales analysis of products and items used in the distribution.

- *To access this task...*

Select **Sales Analysis By Distribution Code** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **D** to print a report at the distribution code level.
-or-
Enter **P** to print a report at the distribution code and product level.
-or-
Enter **I** to print a report at the distribution code, product, and item level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Distribution Code field...

- Enter the number of the first distribution code to appear on the report.
-or-
Press **F3** to select from a list of distribution codes.

In the Ending Distribution Code field...

- Enter the number of the last distribution code to appear on the report.
-or-
Press **F3** to select from a list of distribution codes.

In the Beginning Product field...

This field is accessible if you entered P or I in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, distribution codes display on the screen to show its progress.

Sales Analysis By Non-Stock Item

ADD+ON Demonstration Company SAR.KA Sales Analysis By Non-Stock Item	ADD+ON Software v6.0.0 11/15/95 10:08 AM T030 PF
---	---

Period: 11 Nov
Year: 95
Detail Level: N Non-Stock Item
Sequence: U Unsorted
Beginning Product Type: First
Ending Product Type: Last
Beginning Non-Stock Item: First
Ending Non-Stock Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Non-Stock Item

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by non-stock item. Depending on how you set the *Sales Analysis By Non-Stock Item* parameter, this report can also display a sales analysis of the products using the non-stock item.

- *To access this task...*

Select **Sales Analysis By Non-Stock Item** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

The responses available for this field are dependent upon your parameter settings.

- Enter **N** to print a report at the non-stock item level.
-or-
Enter **P** to print a report at the non-stock item and product level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Non-Stock Item field...

- Enter the number of the first non-stock item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Non-Stock Item field...

- Enter the number of the last non-stock item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Beginning Product field...

This field is accessible if you entered P in the Detail field.

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu** without printing the report.

Printing

As the report prints, non-stock item numbers display on the screen to show its progress.

Sales Analysis By Product/Item/Customer

ADD+ON Demonstration Company SAR.LA Sales Analysis By Product/Item/Cust	ADD+ON Software v6.0.0 11/15/95 10:09 AM T030 PF
--	---

Period: 11 Nov
Year: 95
Detail Level: I Customer
Sequence: U Unsorted
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
Beginning Customer: First
Ending Customer: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)? [Y]

Sales Analysis By Product/Item/Customer

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by product/item/customer. This report provides you with an analysis of which customers are using the product/item.

- *To access this task...*

Select **Sales Analysis By Product/Item/Customer** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

- Enter **P** to print a report at the product type level.
-or-
Enter **I** to print a report at the product type and item level.
-or-
Enter **C** to print a report at the product type, item, and customer level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Product field...

- Enter the type of the first product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Ending Product field...

- Enter the type of the last product to appear on the report.
-or-
Press **F3** to select from a list of product types.

In the Beginning Item field...

This field is accessible if you entered I or C in the Detail field.

- Enter the number of the first item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Ending Item field...

- Enter the number of the last item to appear on the report.
-or-
Press **F3** to select from a list of item numbers.

In the Beginning Customer field...

This field is accessible if you entered C in the Detail field.

- Enter the number of the first customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Ending Customer field...

- Enter the number of the last customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the ***Sales Analysis Reports Menu*** without printing the report.

Printing

As the report prints, product types display on the screen to show its progress.

Sales Analysis By Territory/Customer

ADD+ON Demonstration Company SAR.TA Sales Analysis By Territory/Cust	ADD+ON Software v6.0.0 02/09/96 08:46 AM T030 PF
---	---

Period: 02 Feb
Year: 96
Detail Level: I Item
Sequence: U Unsorted
Beginning Territory: First
Ending Territory: Last
Beginning Customer: First
Ending Customer: Last
Beginning Product Type: First
Ending Product Type: Last
Beginning Item: First
Ending Item: Last
12 Period Report: N
Sales Or Units:
MTD, YTD Or Prior: MYP MTD YTD Prior
Page Break: N

Is The Above Information Correct (Y/N)[Y]

Sales Analysis By Territory/Customer

Function

Use this task to print a report showing current and prior year sales history of units, sales, and costs by territory/customer. This report provides you with an analysis of how sales are progressing in a territory and which customers in the territory are buying.

- *To access this task...*

Select **Sales Analysis By Territory/Customer** from the **Sales Analysis Reports Menu**.

About the Fields

In the Period field...

- Enter the base period to include on the report.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu**.

In the Year field...

- Enter the year of the period.

In the Detail field...

- Enter **T** to print a report at the territory level.
-or-
Enter **C** to print a report at the territory and customer level.

In the Sequence field...

- Enter **A** to print the analysis in ascending order.
-or-
Enter **D** to print the analysis in descending order.
-or-
Enter **U** to print an unsorted analysis.

In the Beginning Territory field...

- Enter the first territory to appear on the report.
-or-
Press **F3** to select from a list of territories.

In the Ending Territory field...

- Enter the last territory to appear on the report.
-or-
Press **F3** to select from a list of territories.

In the Beginning Customer field...

This field is accessible if you entered C in the Detail field.

- Enter the number of the first customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the Ending Customer field...

- Enter the number of the last customer to appear on the report.
-or-
Press **F3** to select from a list of customer numbers.

In the 12 Period Report field...

- Enter **Y** to print the prior twelve periods on the report.
-or-
Enter **N** to print without prior analysis.

In the Sales Or Units field...

This field is accessible if you entered Y in the 12 Period Report field.

- Enter **S** to show totals by sales.
-or-
Enter **U** to show totals by units.

In the MTD, YTD Or Prior field...

- Enter **M** to show month-to-date totals on the report first.
-or-
Enter **Y** to show year-to-date totals first.
-or-
Enter **P** to show prior totals first.
-or-
Enter any combination of the above.

This field determines which reporting period appears first, second, and third on your report.

In the Page Break field...

- Enter **Y** to insert a page break between segments.
-or-
Enter **N** to print without page breaks.

The system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to print the report.
-or-
Enter **N** to make changes to the fields.
-or-
Press **F4** to return to the **Sales Analysis Reports Menu** without printing the report.

Printing

As the report prints, territory numbers display on the screen to show its progress.

Period End Processing Menu

```
ADD+ON Demonstration Company      ADD+ON Software v6.0.0
SAP    SA Period End Processing    11/15/95 10:13 AM  T030  PF

      SA Period End Processing
      1. Purge Zero Balance Records

Enter An Option (On/Off/Date/Menu)[ ]

F1=Reports F3=Company F5=SpeedSearch F6=Help  ADD+ON Software (c) 1995
```

Period End Processing Menu

Function

Use this menu to access the purge task that removes outdated sales analysis information.

- *To access this menu...*

Select **Period End Processing Menu** from the *Sales Analysis Main Menu*.

About the Period End Processing Task

There is only one task on the Period End Processing Menu. It is already highlighted when you access the menu. To access the task, press **Return**.

Purge Zero Balance Records

ADD+ON Demonstration Company SAU.AA Purge Zero Balance Records	ADD+ON Software v6.0.0 11/15/95 10:24 AM T030 PF
---	---

Purge Through Year: 95

By Customer: Y
By Territory: Y
By Salesperson: Y
By Customer Type: Y
By Customer Ship-To: Y
By Customer SIC: Y
By Product Type: Y
By Warehouse: Y
By Stocking Vendor: Y
By Distribution Code: Y
By Non-Stock Item: Y

Purge Which Records: 2 Zero Balances

Is The Above Information Correct (Yes/No)? [__]

Purge Zero Balance Records

Function

Use this task to purge zero balance records from your sales analysis information. Records are purged one report at a time.

- To access this task...

Select **Purge Zero Balance Records** from the *Period End Processing Menu*.

About the Fields

When you first access this task the system issues the prompt:

Warning: This Task Permanently Deletes Sales Analysis Records Based On The Selected Criteria. Please Review The Options Presented Before You Begin The Purge Process. You May Wish To Make A Backup Copy Of Your Data Before Proceeding.

- Press **Return** to continue.
-or-
Press **F4** to return to the ***Period End Processing Menu***.

In the Purge Through Year field...

- Enter 2 digits for the year.

In the By Customer field...

- Enter **Y** to purge customer information.
-or-
Enter **N** to ignore customer information.

You need to decide which report data is purged. Choosing *By Customer* for example, affects only the **Sales Analysis by Customer** report. All other reports will be unaffected.

In the By Territory field...

- Enter **Y** to purge territory information.
-or-
Enter **N** to ignore territory information.

In the By Salesperson field...

- Enter **Y** to purge salesperson information.
-or-
Enter **N** to ignore salesperson information.

In the By Customer Type field...

- Enter **Y** to purge customer type information.
-or-
Enter **N** to ignore customer type information.

In the By Customer Ship-To field...

- Enter **Y** to purge customer ship-to information.
-or-
Enter **N** to ignore customer ship-to information.

In the By Customer SIC field...

- Enter **Y** to purge customer SIC information.
-or-
Enter **N** to ignore customer SIC information.

In the By Product Type field...

- Enter **Y** to purge product type information.
-or-
Enter **N** to ignore product type information.

In the By Warehouse field...

- Enter **Y** to purge warehouse information.
-or-
Enter **N** to ignore warehouse information.

In the By Stocking Vendor field...

- Enter **Y** to purge stocking vendor information.
-or-
Enter **N** to ignore stocking vendor information.

In the By Distribution Code field...

- Enter **Y** to purge distribution code information.
-or-
Enter **N** to ignore distribution code information.

In the By Non-Stock Item field...

- Enter **Y** to purge non-stock item information.
-or-
Enter **N** to ignore non-stock item information.

In the Purge Which Records field...

- Enter **Z** to purge zero balance records only.
-or-
Enter **A** to purge all records for the selected year.

When you finish making entries to the fields the system issues the prompt:

Is The Above Information Correct?

- Enter **Yes** to continue the purge.
-or-
Enter **No** to return to the ***Period End Processing Menu*** without purging.

Sales Analysis Maintenance Menu

```
ADD+ON Demonstration Company      ADD+ON Software v6.0.0
SAM   Sales Analysis Maintenance  11/15/95 10:26 AM T030 PF

Sales Analysis Maintenance
1. Parameter Maintenance

Enter An Option (On/Off/Date/Menu)[ ]
F1=Reports F3=Company F5=SpeedSearch F6=Help  ADD+ON Software (c) 1995
```

Sales Analysis Maintenance Menu

Function

Use this menu to access the *Parameter Maintenance* task.

- To access this menu...

Select **Sales Analysis Maintenance Menu** from the **Sales Analysis Main Menu**.

About the Sales Analysis Maintenance Task

The *Parameter Maintenance* task is the only task available on the Sales Analysis Maintenance Menu. It is already highlighted when you access the menu. To access the task, press **Return**.

Parameter Maintenance

ADD+ON Demonstration Company SAP.AA Parameter Maintenance	ADD+ON Software v6.0.0 11/15/95 10:29 AM T030 PF
--	---

Sales Analysis Options	Detail Level
By Customer: Y	I
By Territory: Y	I
By Salesperson: Y	I
By Customer Type: Y	P
By Customer Ship-To: Y	I
By Customer SIC: Y	I
By Product Type: Y	P
By Warehouse: Y	I
By Stocking Vendor: Y	I
By Distribution Code: Y	P
By Non-Stock Item: Y	N

Is The Above Information Correct (Y/N)? [Y_____]

Parameter Maintenance

Function

Use this task to define which data to gather for sales analysis reporting purposes. Set the type of reporting and the level of detail required for each company using the system. You should select only the data that is necessary for company operations.

- *To access this task...*

Select **Parameter Maintenance** from the **Sales Analysis Maintenance Menu**.

About the Fields

The entries you make in these fields affect the display of other tasks within Sales Analysis and the amount of detail appearing on sales analysis reports. The parameters are two-fold: whether to collect the information in the first place; if so, at what level of detail.

When you select this task, the screen displays the current parameters and the system issues the prompt:

Is The Above Information Correct?

- Enter **Y** to accept the parameter information and return to the menu.
-or-
Enter **N** to make changes to the fields.

In the By Customer field...

- Enter **Y** to collect customer data.
-or-
Enter **N** to ignore this data.

In the By Customer Detail Level field...

- Enter **C** to collect only customer information.
-or-
Enter **P** to include product information with the customer information.
-or-
Enter **I** to include item information with the product and customer information.

In the By Customer Type field...

- Enter **Y** to collect customer type data.
-or-
Enter **N** to ignore this data.

In the By Customer Type Detail Level field...

- Enter **C** to collect customer type information at the customer level.
-or-
Enter **P** to include product information with the customer information.
-or-
Enter **I** to include item information with the product and customer information.

In the By Customer Ship-To field...

- Enter **Y** to collect ship-to data.
-or-
Enter **N** to ignore this data.

In the By Customer Ship-To Detail Level field...

- Enter **C** to collect ship-to information at the customer level.
-or-
Enter **S** to include ship-to information with the customer information.
-or-
Enter **I** to include item information with the ship-to and customer information.

In the By Territory field...

- Enter **Y** to collect territory data.
-or-
Enter **N** to ignore this data.

In the By Territory Detail Level field...

- Enter **T** to collect territory information only at the territory level.
-or-
Enter **P** to include product information with the territory information.
-or-
Enter **I** to include item information with the product and territory information.

In the By Salesperson field...

- Enter **Y** to collect salesperson data.
-or-
Enter **N** to ignore this data.

In the By Salesperson Detail Level field...

- Enter **S** to collect salesperson information only at the salesperson level.
-or-
Enter **P** to include product information with the salesperson information.
-or-
Enter **I** to include item information with the product and salesperson information.

In the By Customer SIC field...

- Enter **Y** to collect customer SIC data.
-or-
Enter **N** to ignore this data.

In the By Customer SIC Detail Level field...

- Enter **C** to collect customer SIC information only at the customer level.
-or-
Enter **P** to include product information with the customer SIC information.
-or-
Enter **I** to include item information with the product and customer SIC information.

In the By Distribution Code field...

- Enter **Y** to collect distribution code data.
-or-
Enter **N** to ignore this data.

In the By Distribution Code Detail Level field...

- Enter **D** to collect distribution code information only at the distribution code level.
-or-
Enter **P** to include product information with the distribution code information.
-or-
Enter **I** to include item information with the product and distribution code information.

In the By Product Type field...

- Enter **Y** to collect product type data.
-or-
Enter **N** to ignore this data.

In the By Product Type Detail Level field...

- Enter **P** to collect product type information only at the product type level.
-or-
Enter **I** to include item information with the product type information.

NOTE: The Sales Analysis field in the Inventory Control Item Master Information option takes precedence over this parameter. If you set this parameter to the item level but the Sales Analysis field for the item is set to N or P, you cannot get sales analysis information at the item level.

In the By Stocking Vendor field...

- Enter **Y** to collect stocking vendor data.
-or-
Enter **N** to ignore this data.

In the By Stocking Vendor Detail Level field...

- Enter **V** to collect stocking vendor information only at the vendor level.
-or-
Enter **P** to include product information with the vendor information.
-or-
Enter **I** to include item information with the product and vendor information.

In the By Non-Stock Item field...

- Enter **Y** to collect non-stock item data.
-or-
Enter **N** to ignore this data.

In the By Non-Stock Item Detail Level field...

- Enter **P** to include non-stock item information only at the product level.
-or-
Enter **I** to include item information with the product information.

In the By Warehouse field...

- Enter **Y** to collect warehouse data.
-or-
Enter **N** to ignore this data.

In the By Warehouse Detail Level field...

- Enter **W** to collect warehouse information only at the warehouse level.
-or-
Enter **P** to include product information with the warehouse information.
-or-
Enter **I** to include item information with the product and warehouse information.

When you finish making entries to the fields, the system issues the *Is The Above Information Correct?* prompt again.

Sales Analysis Utilities Menu

ADD+ON Demonstration Company SAX Sales Analysis Utilities	ADD+ON Software v6.0.0 02/09/96 08:48 AM T030 PF
Sales Analysis Utilities 1. Rebuild SA Cross-References 2. Generate SA From Invoice History	
Enter An Option (On/Off/Date/Menu)[_____]	
F1=Reports F3=Company F5=SpeedSearch F6=Help ADD+ON Software (c) 1995	

Sales Analysis Utilities Menu

Function

Use this menu to gain access to the Sales Analysis conversion and cross-reference rebuild functions. The tasks on this menu are seldom, if ever, used. They are there for recovery after a system crash.

- *To access this menu...*

Enter **SAX** at any menu prompt.

About the Sales Analysis Utilities Tasks

To access any task on the utility menu, enter the number assigned to the task in the *Enter An Option* field.

Use the tasks on this menu to rebuild sales analysis cross-references and to generate sales analysis from invoice history.

Rebuild SA Cross-References

Use this task to rebuild the cross-reference file which accesses sales analysis data. Your dealer may request that this task be run if it appears that your cross references are not correct.

The system issues the prompt:

Do You Wish To Rebuild Sales Analysis Cross-References?

- Enter **Yes** to begin rebuilding.
-or-
Enter **No** to return to the **Sale Analysis Utilities Menu**.

Generate SA From Invoice History

The Sales Analysis by Stocking Vendor report is a new feature of Sales Analysis version 6.0. Because data for sales analysis reporting is normally created only during the Order/Invoice Processing Sales Register update, this conversion program was developed for the purpose of creating sales analysis data for the stocking vendor from invoices that have already gone through the Sales Register update process.

Use this task only when you are upgrading an existing Sales Analysis installation to version 6.0 or later. In addition, it is recommended that the conversion be performed by or under the close supervision of an **AddonSoftware** dealer.

Appendix A

Registers, Reports & Listings

11/14/95	ADD+ON Demonstration Company				Page 7	
11:40 AM	Sales Analysis By Customer For Nov 95					
From Customer: First	From Product Type: First		From Item: First			
To Customer: Last	To Product Type: Last		To Item: Last			
Customer/Product Type/Item	Units	Sales	Cost	Gross Profit	Percent	
00-1000 Mile High Bike Rentals						
1402 Attachable Tire Repair Kit						
Nov 95	3	45.00	21.75	23.25	107.00%	
YTD	8	120.00	44.00	76.00	173.00%	
Nov 94	2	24.00	13.50	10.50	78.00%	
Prior YTD	5	60.00	33.75	26.25	78.00%	
Total for A	Nov 95	45	534.50	197.00	337.50	171.00%
	YTD	110	2311.00	985.60	1,325.40	134.00%
	Nov 94	13	168.00	74.25	93.75	1.00%
	Prior YTD	60	657.50	311.35	346.15	111.00%
Total for 001000	Nov 95	98	1,876.35	722.00	1,154.35	160.00%
	YTD	387	3,498.00	1,615.00	1,883.00	117.00%
	Nov 94	33	179.00	83.00	96.00	116.00%
	Prior YTD	160	1,657.50	1,311.35	1,346.15	103.00%
Total for Report	Nov 95	164	13,427.00	8,922.00	4,505.00	50.00%
	YTD	1,138	18,481.35	13,712.05	14,769.30	108.00%
	Nov 94	57	1,960.00	990.00	970.00	98.00%
	Prior YTD	345	8,025.50	4,716.79	3,308.71	70.00%

Sales Analysis By Customer—Based on Sales

For information on how to generate this report, see pages 4-50 & 4-51.

11/14/95 03:37 PM	ADD+ON Demonstration Company 12 Period Sales Analysis By Customer Sales Through Nov 95												Page 6
From Customer: First To Customer: Last	From Product Type: First To Product Type: Last						From Item: First To Item: Last						
Customer/Product Type/Item	Dec 94	Jan 95	Feb 95	Mar 95	Apr 95	May 95	Jun 95	Jul 95	Aug 95	Sep 95	Oct 95	Nov 95	Total
00-1000 Mile High Bike Rentals													
A Accessories													
1400 Bicycle Pack	30	12	0	0	15	0	0	15	0	0	15	0	87
1401 Drinking Water Bottle	30	0	0	5	0	10	15	0	5	0	5	0	70
1402 Attachable Tire Repair Kit	30	0	2	4	0	2	5	10	0	2	2	3	60
Total for A	90	12	0	5	15	40	15	15	5	0	20	0	217
Total for 001000	90	12	18	5	15	40	15	15	5	54	20	98	387
Total for Report	130	22	65	5866	95	140	2615	145	90	350	85	375	9,978

Sales Analysis By Customer—12 Period

For information on how to generate this report, see pages 4-50 & 4-51.

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