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Revised April 1996
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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 Warehouse
- SA by Territory
- SA by Stocking Vendor
- SA by Salesperson
- SA by Distribution Code
- SA by Customer Type
- SA by Non-Stock Item
- SA by Customer Ship-To
- SA by Product/Item/Customer
- SA by Territory/Customer
- SA by SIC
- SA by Product

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 _______________________________________
______________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
1-8  Sales Analysis
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

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<thead>
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<th>Stage</th>
<th>Target</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Installation Review:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Information Review:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversion Training:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conversion Review:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Daily Processing Training:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Period End Training:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Installation Complete:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Signature ____________________________

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*Signature ____________________________

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*Signature ____________________________

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2-6 Sales Analysis
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

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

**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**.

---

### Table: Sales Analysis By Customer

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<tr>
<th>Period</th>
<th>Units</th>
<th>Sales</th>
<th>Cost</th>
<th>Units</th>
<th>Sales</th>
<th>Cost</th>
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<td>0</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Nov</td>
<td>0</td>
<td>0.00</td>
<td>0.00</td>
<td>0</td>
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<td>0.00</td>
</tr>
<tr>
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<td>0.00</td>
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<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

**Totals**: 138 | 8481.35 | 3712.05 | 92 | 1729.00 | 1480.20

<FL> = Display Next Record  <Enter> = Continue  [_____]
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

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

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

<table>
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<tr>
<th>Period</th>
<th>Units</th>
<th>Sales</th>
<th>Cost</th>
<th>Units</th>
<th>Sales</th>
<th>Cost</th>
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<td>0.00</td>
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<td>0.00</td>
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<td>0.00</td>
<td>0</td>
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<td>0.00</td>
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</table>

Totals | 110  | 8120.50 | 3523.09 | 239  | 2800.00 | 1930.04 |

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

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

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

<table>
<thead>
<tr>
<th>Period</th>
<th>Units</th>
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<th>Cost</th>
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<td>769.00</td>
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<td>0.00</td>
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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

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

### 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

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

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

### Product Type: C

#### Components

**Item: ********** Summary **********

**Customer: ******** Summary **********

### Fiscal 1995 and Fiscal 1994

<table>
<thead>
<tr>
<th>Period</th>
<th>Units</th>
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<th>Cost</th>
<th>Units</th>
<th>Sales</th>
<th>Cost</th>
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</tr>
</tbody>
</table>

**Totals**

|       | 90   | 5267.35 | 3036.57 | 52   | 1985.00 | 1326.82 |

- **<F1>=Display Next Record**
- **<Enter>=Continue**

### 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

**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**.

<table>
<thead>
<tr>
<th>1. Sales Analysis By Customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Sales Analysis By Territory</td>
</tr>
<tr>
<td>3. Sales Analysis By Salesperson</td>
</tr>
<tr>
<td>4. Sales Analysis By Customer Type</td>
</tr>
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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

Period: 11 Month
Year: 95
Detail Level: 1 Item
Sequence: 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:
MYD, YTD Or Prior: MYD YTD Prior
Page Break: N

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

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

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

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

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.
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

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

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

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

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

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

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

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

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.
- Enter N to make changes to the fields.
- 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

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

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: Z Zero Balances

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

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:


- 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

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.
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.
- Enter N to make changes to the fields.

In the By Customer field...
- Enter Y to collect customer data.
- Enter N to ignore this data.

In the By Customer Detail Level field...
- Enter C to collect only customer information.
- Enter P to include product information with the customer information.
- 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.
- 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.
- Enter P to include product information with the customer information.
- 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.
- 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

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 SAS 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.
### Sales Analysis By Customer—*Based on Sales*

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

<table>
<thead>
<tr>
<th>Customer/Product Type/Item</th>
<th>Units</th>
<th>Sales</th>
<th>Cost</th>
<th>Gross Profit</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>00-1000 Mile High Bike Rentals</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1402 Attachable Tire Repair Kit</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nov 95</td>
<td>3</td>
<td>45.00</td>
<td>21.75</td>
<td>23.25</td>
<td>107.00%</td>
</tr>
<tr>
<td>YTD</td>
<td>8</td>
<td>120.00</td>
<td>44.00</td>
<td>76.00</td>
<td>173.00%</td>
</tr>
<tr>
<td>Nov 94</td>
<td>2</td>
<td>24.00</td>
<td>13.50</td>
<td>10.50</td>
<td>78.00%</td>
</tr>
<tr>
<td>Prior YTD</td>
<td>5</td>
<td>60.00</td>
<td>33.75</td>
<td>26.25</td>
<td>78.00%</td>
</tr>
<tr>
<td><strong>Total for A</strong></td>
<td>45</td>
<td>534.50</td>
<td>197.00</td>
<td>337.50</td>
<td>171.00%</td>
</tr>
<tr>
<td>YTD</td>
<td>110</td>
<td>2311.00</td>
<td>985.60</td>
<td>1,325.40</td>
<td>134.00%</td>
</tr>
<tr>
<td>Nov 94</td>
<td>13</td>
<td>168.00</td>
<td>74.25</td>
<td>93.75</td>
<td>1.00%</td>
</tr>
<tr>
<td>Prior YTD</td>
<td>60</td>
<td>657.50</td>
<td>311.35</td>
<td>346.15</td>
<td>111.00%</td>
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