

# Sales Analysis

Passport Business Solutions™

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# Understanding Sales Analysis

This chapter contains the following topics:

<a href="#">PBS Modules</a>	.....
<a href="#">Product description</a>	.....
<a href="#">Report Descriptions</a>	.....
<a href="#">Report Timing Considerations</a>	.....
<a href="#">Definitions</a>	.....

## **PBS MODULES**

Following are a short explanation of Sales Analysis and the modules that produce data accessed by Sales Analysis.

### **Sales Analysis**

Sales analysis is the examination and interpretation of sales activities.

Its purpose is to identify the products, customers, sales personnel, regions, etc., that contribute the most to the company's sales and profits.

With this information, a company can adjust its activities to increase its sales and profits.

Sales analysis is often abbreviated as either S/A or SA.

### **Accounts Receivable**

Accounts receivable is the accounting area concerned with recording sales made on credit. It keeps track of all customers, what they have purchased, what they have paid, and how much they still owe.

Accounts receivable is often abbreviated A/R or just AR.

### **Inventory Control**

The PBS Inventory Control records and keeps track of your company's inventory (the store of goods or items your company sells).

Inventory control is often abbreviated as I/C or simply IC.

### **Order Entry**

The PBS Order Entry module (often abbreviated O/E or OE) lets you enter orders and quotations for items in your inventory which can then be transferred to invoices in A/R.

Although O/E is not used directly by S/A, the Item Comparative reports are not available unless O/E is used.

### **Point of Sale**

The PBS Point of Sale module (often abbreviated P/S or POS) lets you enter orders, invoices and quotations.

Point of Sale contains history information for all Point of Sale transactions. Point of Sale has separate history from A/R history. The POS Sales Analysis reports exclusively access the Point of Sale history.

### **Sales Analysis Terms**

This section lists some terms, which occur repeatedly throughout this documentation. You can obtain reports based on any of these. You may refer to the A/R and I/C User documentation for an

explanation of these terms.

<b>A/R Terms</b>	<b>I/C Terms</b>
Customer type	Item number
SIC	ABC code
Sales representative	Warehouse
State	Product category and sub-category
Zip code	Vendor number
Sales territory	Inventory account number

## PRODUCT DESCRIPTION

Sales Analysis includes those features most asked for by thousands of users whose experiences since 1980 have helped refine it to its current level.

Passport Business Solutions Sales Analysis runs together with Accounts Receivable (A/R), Inventory Control (I/C) and Point of Sale (P/S).

You may also be using Order Entry (O/E), Purchase Order (P/O), Payroll (PR), Accounts Payable (A/P), Job Cost (J/C), Customer Order Processing, and/or Product Purchasing. Sales Analysis does not interface directly with these modules. Of course, events that occur in A/R or I/C are correctly recognized by S/A even though they originated as events in some other module. For instance, an invoice in A/R might have originally been entered as a quotation in O/E, or the cost of an item in I/C might have been determined by a purchase order in P/O.

Any reports can be stored on disk to save computer time and reduce paper use. They may be printed later at your convenience.

Many of the reports have a CSV export option. This allows you to open the report in your favorite spreadsheet program.

## Available Reports

The following table shows the reports, which are available when various modules are installed (and interfaced):

Sales Analysis by	A/R Only	I/C Only	Both
Customer	X		X
Customer Sales Volume	X		X
Customer Type	X		X
Customer SIC	X		X
Customers for an Item	X		X†
Item	X	X	
Item Sales Volume	X		X
Item Category	X	X	
Items for a Customer		X	X
Services for a Customer	X†		X†

Sales Analysis by	A/R Only	I/C Only	Both
Item	X	X	
Item Sales Volume	X		X
Item Category	X	X	
Items for a Customer		X	X
Services for a Customer	X†		X†
Customers for a Service	X†		X†
Sales Rep, Actual	X†		X†
Sales Rep, Responsible	X*		X*
Sales Territory	X		X
State	X		X
ZIP Code	X		X
Customer Comparatives	X		X
Item Comparatives			X
*If invoice history is not kept, the summary report is available but not the detail report.			
† Provided invoice history is kept			

Item reports require that I/C be interfaced. The item number in the Goods / Services file is not suitable for preparing item reports because it contains no totals for the item, only the item’s description.

The menu selections under *POS Sales Analysis* can only be used if Point of Sale is installed.

### Sales Analysis Menu

The PBS S/A includes a menu from which the desired reports can be selected. Any of the S/A reports can be printed at any time without affecting any of the data files from which they draw their information.

### Password Protection

A password is a unique code you assigned to each individual using your Passport Business Solutions software. Each potential user must first enter a valid password before he or she will be allowed to use

a protected function. If you are logging into PBS for the first time, you will be asked to change your password.

### Reports Scope

In the broadest terms, the Customer reports (from A/R) and the Item reports (from I/C) are two different ways of looking at the same information: sales are sales (what items have been sold versus what people they have been sold to). As soon as the reports are examined in detail, however, differences in their scope are apparent.

### Customer reports

The customer reports are tabulations of what you have sold in the Accounts Receivable module primarily via invoices and credit memos.

This means that some things are included in the customer reports, which have no counterpart in the item reports:

- Service line items.
- Goods line items for goods ordered from A/R Goods and services.
- Invoices for jobs.
- Transactions entered in A/R Miscellaneous charges.

Conversely, the following sales are not included in the customer reports:

- Sales made via the Sales and Credit memo options of the I/C Inventory transaction, when these are entered manually.

Miscellaneous customers as well as regular customers are included in the customer reports.

### Item Reports

The item reports are tabulations of sales and credit memo transactions in I/C. This includes those that were entered manually, as well those that were an automatic by product of the invoicing process (including invoices and credit memos originating as orders, RMA's, or quotations).

Item reports do not include the following:

- Items which you sold but which never formed part of your inventory:
  - Drop shipments.
  - Jobs.
  - Services.
- Items which you did have in inventory but which you disposed of in some way other than by selling them:
  - Components which were assembled into kits.
  - Items which were used in jobs.

Items which were adjusted out of existence (pilfered, spoiled in storage, destroyed accidentally).

Serialized items which you have loaned or rented.

- Items which you purchased (in P/O) but did not put into inventory:

Items used for other.

Items used for jobs.

### **Both types of reports**

- Discounts applied at the time of sale (whether to a line item or to an invoice as a whole) are reflected on both types of reports.

## REPORT DESCRIPTIONS

The reports in this documentation reflect most of the demonstration data in the A/R, I/C and P/S modules, as well as that in S/A. For illustrative purposes, it is assumed that you use these modules.

Reports are available either in summary or in detail formats. In addition, they can be produced as labels or as comma-separated, variable files.

### Customer Reports

The discussion above described common features of all the customer reports. In this section reports are described individually. Each of the reports listed below is the subject of a separate chapter in this documentation.

#### Customer Sales Volume Report

This report lists customers in [descending] order by sales volume. It shows sales, costs of sales, gross profit figures, and margin percentage, as well as each customer's percent of total sales and percent of total gross profit. These amounts are shown for period-to-date, year-to-date, and last year.

Customers can be printed in order by either sales-volume within customer, sales-volume within sale-representative, or sales-volume within sales territory.

Optionally, you can specify a minimum dollar volume, or you can specify to print only the top *n* customers.

#### Customer Type Report

This report shows the same information as the Sales Analysis by Customer, but customers are grouped and subtotaled by customer type. (Customer type is a user-defined, 5-character code that can be assigned to each customer in A/R).

A summary is printed for this report, showing each customer type's total sales, total cost of sales, total gross profit, percent of total sales, and percent of total gross profit.

#### Customer SIC Report

This report shows the same information as the Sales Analysis by Customer, but customers are grouped and subtotaled by Standard Industry Code. An SIC code can be assigned to each customer in A/R.

#### Customers For An Item Report

This is arranged by item and shows the customers who purchased each item.

This report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percentage for a selected range of items and the customers those items were sold to, within up to four selected reporting periods.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by customer number within Item number or customer sales-volume within Item.

The total for any given customer on this report may not in general equal the total for the same customer on the Customer report (because this report only includes item-related sales).

### Customer Report

This report shows period-to-date, year-to-date, and last year sales, cost of sales, gross profit figures, and margin percentage for each customer in Accounts Receivable. Each customer's percent of total sales and percent of total gross profit is also shown.

### Item reports

This section describes the item reports individually. Each of the reports listed below is the subject of a separate chapter in this documentation.

#### Item Report

This report shows basic sales information for each item in Inventory Control.

The information printed includes quantity sold, quantity returned, sales amount, costs, gross profit, margin percentage, and each item's percent of total sales and percent of total gross profit, by both period-to-date and year-to-date. Prior period figures can also be shown.

#### Item Sales Volume Report

This report lists items in order by sales volume. It shows sales, costs of sales, gross profit, and margin percentage figures, as well as each item's percent of total sales and percent of total gross profit.

Items can be printed in order by sales volume by item, or sales volume by warehouse by item. You can also specify a minimum dollar volume or specify to print only the top n items.

#### Item Category Report

This report shows the same information as the Item Report, but items are grouped and subtotaled by product category or sub-category.

A summary is printed for this report which shows each item category's or sub-category's total sales, total cost of sales, total gross profit, percent of total sales, and percent of total gross profit.

#### Items For A Customer Report

This report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percentage for a selected range of items within up to four selected reporting periods, showing the items purchased by each customer. It is the converse of the Customers for an Item report.

Percentages are based on sales and profits within selected reporting ranges.

You can print this report in order item number for each customer, or by sales volume of each item per customer.

### Service Reports

These reports are useful if a significant portion of your business consists of providing services rather than merchandise to your customers.

#### Services for a Customer Report

This report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percentage for a selected range of services within up to four selected reporting periods, showing the services purchased by each customer.

#### Customers for a Service Report

This report shows the same information as the preceding report, arranged by service, showing the customers who purchased each service.

### Sales Representative Reports

For the difference between these two reports, refer to the section on *Timing Considerations* later in this chapter.

#### Sales Rep, Actual, Report

For each sales rep, this shows the sales amount, percent of total company sales, cost of sales, profit, percent margin, percent commission amount, and commission percent of sales.

The detail format shows the above information for each customer within sales rep; however, this is only available if you keep invoice history. If you do not, the summary report is still available (obtained from totals maintained in Sale Representatives).

#### Sales Rep, Responsible, Report

This report shows the period-to-date, year-to-date, and last year sales, cost of sales, and gross profit, and margin percentage for each customer. These figures are grouped by responsible sales rep with subtotals by sales rep.

The report includes a summary, which shows each sales rep's percent of total sales and percent of total gross profit.

### Location Reports

These reports are intended for analyzing your sales geographically.

#### Sales Territory Report

This report shows the period-to-date, year-to-date, and last year sales, cost of sales, and gross profit, and margin percentage for each customer. These figures are grouped and subtotaled by sales territory.

### **State Report**

Customers are printed grouped by state on this report. Sales, cost of sales, gross profit figures, and margin percentage are shown for each customer. Subtotals are shown by state.

A summary is produced which shows each state's percent of total sales and percent of total gross profit.

### **ZIP Code Report**

Customers are printed grouped by ZIP code on this report.

A summary shows individual ZIP code percent of total sales, cost of sales, profits, and margin percentage for the period-to-date, year-to-date, and last year.

### **Comparative Reports**

These reports differ from the other reports in the module in that five years of comparative information are maintained within S/A itself. It is not necessary for you to keep any history within A/R and I/C in order to take advantage of these reports. The reports are available in yearly, monthly, and quarterly versions.

#### **Customer Comparative Reports**

These let you to compare results by customer from one period to another, or to a corresponding period in some prior year.

#### **Item Comparative Report**

These reports allow you to compare results by item from one period to another, or to a corresponding period in some prior year.

## REPORT TIMING CONSIDERATIONS

In general, S/A reports are not obtained by tabulating all the detail transactions that have occurred in the past. They are driven by files or tables which have themselves already been summarized (by customer or by item). This allows relatively rapid preparation of any desired report, but it also means that some contemporary details about individual transactions cease to be available. S/A compensates for this by assuming that a customer's (or an item's) current properties (address, sales territory, product category, etc) can be used to categorize his past transactions.

The dollar amounts of a transaction (price, cost, and margin), in contrast to the properties by which a transaction is classified, are those that actually applied to that transaction. You need not be concerned that they only reflect the current cost or price. Where the latter is shown on a report, it is there for information purposes only.

Usually this procedure works to your advantage, but there are cases in which it is well to remember that the reports are not quite what they seem. They appear to be showing you what actually happened in the past. In reality, they are showing you what would have happened if conditions in the past had been the same as they are now.

The two examples below illustrate this.

### First example

Suppose you have defined four Sales territories: Eastern, Western, Northern, and Southern. In 2009, you decide to carve out a new Central territory from portions of the four existing territories. (You can do this by reassigning the Sales territory field of the customers affected, via the A/R Customers selection).

Immediately, all your S/A reports for each territory, including the new one, will show valid year-to-date and prior-year information. Your history has been automatically and retroactively reorganized to reflect the new territory boundaries.

### Second example

Now suppose you are planning to open some new branch offices in locations where sales growth has been particularly strong. You plan to use the Sales Analysis by Zip Code report to identify such locations.

Be aware that whenever a customer moves from one city to another, he carries his history with him. If ten customers have moved from Mudville to Gotham City within the last two years, you might expect the ZIP code report to show a sharp decline in Mudville sales and a corresponding surge in Gotham City sales. This will not be the case. Mudville will appear to have always had a low sales volume, and Gotham City will appear to have always had a high one.

For this purpose, you would be well advised to ignore the prior-year column of the report, and instead to compare a report printed currently with the corresponding reports printed last year and the year before.

## The exception

There is one report, which is compiled directly from contemporary detail transactions, namely the detailed Sales Analysis by Actual Sales Representative report. This report tabulates sales according to the representative who actually made the sale, regardless of whether or not he was on file as the customer's regular sales representative at the time, the report was printed.

## Reporting periods

Three kinds of reporting periods are used in S/A.

1. The reports driven directly by A/R and I/C data (that is, all the reports except the Comparative reports) reflect whatever reporting period you use in those modules. What goes into the period-to-date, last-period, and year-to-date columns of the S/A reports is determined solely by when you closed a period or a year in A/R or I/C. This fully accommodates users who may have chosen some reporting structure other than the usual monthly one.
2. The Comparative reports store their data by month, and therefore assume a twelve-month reporting structure. This is not to say that your reporting year must begin in January, nor that a reporting month must correspond exactly with a calendar month. What it means is that the system expects twelve period closing no more and no less in every year. If your reporting structure is based on some different interval, you cannot use the Comparative reports.
3. Some reports allow a supplementary reporting structure independent of your period closing:
  - The reports that print items or services for a customer.
  - Those that print customers for an item or a service.
  - The detail report for actual sales representatives.

For these, you can specify any desired reporting periods. There can be as many as four, and they can overlap. For instance, you might show week-to-date, month-to-date, quarter-to-date, and same-month-last-year totals on the same report.

## DEFINITIONS

The following lists definitions associated with accounting, data processing, and Sales Analysis.

### Accounting Terms

#### Accounting

Accounting is the methodical collection, systematic categorization, and organized presentation of financial records.

#### Sales

A sale is an exchange of goods or services for an agreed-upon sum of money. Items are usually sold in exchange for cash or on credit. Since sales are the source of money coming into a business, a clear picture of your company's sales activities is critical to the company's operations.

#### Cost of sales

You must either manufacture or buy the items you sell, and then resell them at a higher price. The cost of sales column in the S/A reports shows how much it cost you to acquire the goods you sold.

#### Percentage of sales

The percentage of sales shown in S/A reports shows the proportion of the sales amount for a certain item or category to the total sales.

#### Margin percentage

The difference between an item's cost and its selling price is the item's profit, also known as the margin.

The margin percentage is a percentage showing the relationship between your margin (or profit) and the amount of the sale. S/A reports show you which items or categories produced a higher margin percentage than others, so you can judge which products yield the greatest profit per sale.

#### Percent of profit

The amount of money a customer pays for an item, minus what it costs you to supply that item, is called the profit.

The percent of profit figure in the S/A reports shows you how much profit certain sales activities are yielding in relation to the total profit.

#### Totals

The S/A reports show totals at various places within each report and then again for the entire report.

Although the total for a percent of sales or a percent of profit is in theory always 100.0, round-off errors sometimes result in totals of 99.9 or 100.1.

## Data Processing Terms

### Function

As used here, function means one or more programs that accomplish a specific task. Each selection on a menu of a Passport module is a function.

### Data Organization

Most of the information you enter into your computer is stored on your hard disk. In order for computer programs to be able to locate specific pieces of data (within large masses of data), and to be able to process data logically, data must be organized in some predictable way. The PBS software organizes your data for you automatically as it stores it on your hard disk.

### Character

A character is any letter, number, or other symbol you can type on your computer keyboard.

### Field

A field is one or more characters representing a single piece of data. For example, a name, a date, and a dollar amount are all fields.

### Record

A record is a group of one or more related fields. For example, the fields representing a customer's name, address, and account balance might be grouped together into a record called the customer record. On a PBS SQL system a record is often referred to as a row.

### Entry

A record in a data file is often referred to as an entry.

### Data file

A data file is a group of one or more related records. A data file is often referred to simply as a file (without the word data). On a PBS SQL system a data file is referred to as a table.

The Customer File in Accounts Receivable is an example of a data file. Such a file is made up of several records, each of which contains the name, address, etc. for one customer.

Each file is kept separate from other files on the disk.

There are other types of files in addition to data files. For example, programs are stored on the disk as program files. However, references to files in this documentation imply data file unless specifically stated otherwise.

### Integrated

When a set of accounting modules is integrated, any information generated in one area and needed in another area is automatically supplied to that other area. You do not have to enter the information twice.

The PBS software is fully integrated, and Sales Analysis is a prime example. All information used in the Sales Analysis reports comes from Accounts Receivable and Inventory Control.

## Help

Help refers to descriptions of functions which appear on the screen by pressing a designated key <F8>. The Help text gives you a quick reference to the highlights of functions while you are running the application.

## Look-ups

Look-ups refer to a list of available entries for a particular field. There are two kinds of lookups: Data Lookup and Date Lookup.

### Data Lookup

Many fields allow you to press a designated key <F8> to show all available data on file. For instance, when entering an invoice you may press this key at the Account number field to bring up a list of all G/L accounts on file. Selecting an entry from this list is often easier and faster than remembering the account number or stepping through all possible entries until the right one is reached.

### Date Lookup

The date lookup provides a point and click window for finding and entering date fields.

In Graphical mode the date lookup is available via the <F4> key. In Character mode (Windows only) you may access the date lookup via the <F7> key.

### **Note**

Depending on where you press <F8>, this function will return a Look-up window or context sensitive Help. If a Look-up window is returned, pressing <F8> a second time will display Help for the field if available.

# Getting Started

This chapter contains the following topic:

[Introduction](#) .....

## INTRODUCTION

We assume at this point that you have installed Sales Analysis on your computer according to the Vision Install and Release Guide or the SQL Install and Release Guide. If you have not done so, refer to that documentation and install the S/A module before proceeding.

### Your Accountant

We advise you to consult with your accountant before using the Passport Business Solutions software. Your accountant should be familiar with your accounting software in order to serve you well, and may have good advice on converting from your existing S/A system.

If your accountant is not familiar with PBS encourage them to contact Passport Software for training.

### Sales Analysis Data

The main files or tables used by the module are:

- Master data
- Control information
- Comparative data
- Report Value data
- Work files

These are described below:

#### Master Data

Unlike other PBS accounting modules, Sales Analysis has no master data of its own. The information used in the S/A reports comes from the data of Accounts Receivable and Inventory Control.

#### Control Information

Like other PBS accounting modules, S/A has control information. In fact, it has two of them: one for A/R-related information, and one for I/C-related information. (If you use only one of these modules, the control information for the other module is omitted).

#### Comparative Data

S/A allows you (but does not require you) to maintain up to five years of comparative information (organized by period) on customers or items or both. To use this feature, you must be using the A/R and I/C modules, respectively.

S/A extracts this statistical information from A/R and I/C and maintains it in separate files within S/A. At first glance it may seem wasteful to store the data in both places, but this is not really the case.

Storing the essential data within S/A permits the other modules to purge their history earlier than they would otherwise have to.

Each comparative supports three methods of maintaining the data:

1. *Load* lets you create an entire year's worth of data. You would use this selection primarily upon initial installation of S/A.
2. *Transfer* captures one accounting period's data. You would routinely run this selection as part of your period-close processing.
3. *Enter* allows you to adjust the statistics for an individual customer or item. Changes you make are not retrofitted into A/R or I/C. Suppose for instance that two of your customers merged. You might want to consolidate their earlier history manually. Future business with the successor corporation can then be compared meaningfully to past business with the predecessor corporations.

### Report Value Data

S/A uses separate files to remember your favorite report selection criteria under any name you choose to assign. The next time you want a report in the same format, you can call for it by name instead of having to re-enter the selection parameters.

### Work Files

S/A uses numerous work files for building its reports. Each such file is internal to a program and goes away after the report has been generated.

### Using Sales Analysis

Except for the Comparative reports, S/A is ready for use as soon as you have installed it and supplied the Control information. Study the first several chapters of the *System User* documentation so you know how to use the module.

The Comparative reports are not available until you have closed at least one period. You can if you wish retroactively load Comparatives with historical information. Refer to the [Load Customer Comparatives](#) section of the Customer Comparative chapter and the [Load Item Comparatives](#) of the Item Comparative chapter.

The [Using Sales Analysis](#) chapter explains how to start the menu that lists all the S/A selections.

The remaining chapters explain the S/A reports. The reports show sales, cost, and profit information that will help you spot such things as the best-selling items or item categories, the most profitable sales region, your most productive sales personnel, or your best customers.

### Support and Training

If you have problems with this software module, contact your PBS provider. It is very important that you have a full understanding of the functions and features of the PBS system. A lack of product knowledge can lead to errors in processing and functions not used that may be very useful for you company. The documentation provided with the PBS install has all the information you need. There

is a complete guide for each module. There are also some online training videos in our training library available from [www.pass-port.com](http://www.pass-port.com).

For the name and location of a PBS provider near you, contact Passport Software at 1-800-969-7900.

If you wish to receive support directly from Passport Software, please call our End User Support Department at 1-800-969-7900, 124.

You can contact your own PBS provider for training; however, if your provider does not offer training, call Passport at 1-800-969-7900.

# Using Sales Analysis

This chapter contains the following topics:

[About this Documentation](#) .....

[Starting Sales Analysis](#) .....

## ABOUT THIS DOCUMENTATION

This documentation provides the information needed to learn and use the Passport Business Solutions Sales Analysis.

### Organization

The next chapters describe how to use the Passport Business Solutions Sales Analysis on a daily basis.

Additional information can be obtained from the *System User* documentation, which contains chapters that describe features common to all PBS modules.

### System Topics

Topics covered in the *System User* documentation include:

- General rules of data entry, function keys and mouse usage
- Using the menus
- Printing reports and forms
- Help and Lookups
- Switching companies
- Glossary of terms
- The use of printers and view options for reports

### How to Use This Documentation

When beginning, you will want to keep this documentation handy so you can refer to it as often as you need. Later, you may only need to refer to it occasionally.

Each chapter of this documentation provides instructions on how to use a particular selection of your software.

The instructions include many examples of what to enter where. In fact, you can go through the documentation entering all the examples as you come across them. This will give you a good demonstration of the capabilities of your new software.

After you are through using the examples, be sure you initialize the data files before you begin entering your actual business information. See the *Initializing Data* chapter in the *PBS Administration* documentation for information on how to do this.

If you are in a multi-company environment, you may wish to dedicate a test company for training purposes only, and re-load the demo data into this company as often as needed.

If you are in a single-company environment, many of these examples can be used safely provided you take care to delete any entries you have created after you are finished (and before posting

anything!). The alternative is to suspend all actual processing, back up all your files, load the demo data, hold your training session, and then restore the production data afterwards.

### Help and Data Lookup

You may access help on the full graphical screens by selecting <Ctrl>+<F1>. Select the <F8> key to Lookup data. For the Calendar lookup, select <F4>.

In character mode you can press the <F8> key at any time from any field. Pressing <F8> once will retrieve a data lookup or on-line Help about a task or selection you are currently using. If a Pop-up window is displayed but you want Help, press <F8> a second time.

### Menus

A *menu* is a list of things from which something can be selected.

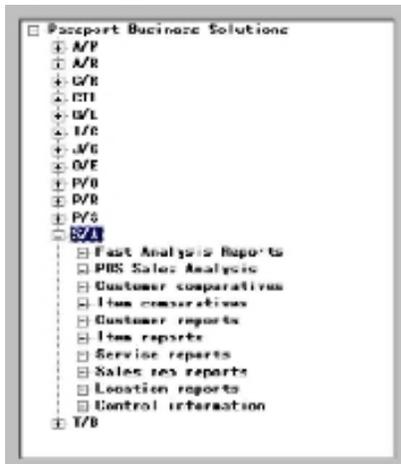
Selecting items from a menu on a computer is the way you tell your computer what you want to do.

The Windows version of Passport Business Solutions can have three different menu types. They are the Tree-view, Windows and Menu-bar types.

The SCO Open Server and Linux versions only use the Menu-bar.

#### Tree-view Menu

The following is an example of the Tree-view menu.



The "+" corresponds to expandable menu sections. One click will open the menu selection for the application or the sub-menu of a particular menu entry. Clicking on the "-" closes the menu item. Viewing application menus will cause a vertical slider bar to display: and sometimes depending on size and proportions of the screen and associate font, the slider bar as well. These sliders are mouse enabled.

In addition to the mouse-based menu operation, you can use the keyboard to navigate the tree-view menu. The home, end, page-up, page-down and arrow keys provide a quick and easy method of maneuvering around the menu.

To select the menu program use the Enter key or click on the menu line with the mouse.

### **Menu-bar Menu**

The remainder of this section describes the functions of the Menu-bar. To navigate horizontally between individual modules use your keyboard's left and right arrow keys. Up to ten modules and your Passport Business Solutions System Manager may be displayed on the menu bar. If you are using more than ten modules, a **More** function is added to the menu bar. To access your additional modules, highlight **More** and press your <Enter> key.

To navigate vertically within a module you have two choices. You may use the up and down arrow keys on your keyboard or you may type the first letter of a displayed menu item. If more than one menu item starts with the same letter, pressing the letter again will position your cursor over the next menu item starting with that letter.

### STARTING SALES ANALYSIS

To start your Passport Business Solutions software, select one of the following options. If you are unsure how to proceed, please contact your supplier.

#### For Windows

**Start->Programs->Passport Business Solutions->PBS**

#### For UNIX/Linux

Ensure you are logged in as a user authorized to use Passport software. Refer to the *PBS Administration* documentation for more information.

Type the following:

```
cd /usr/pbs
```

or replace “*/usr/pbs*” with the name of your PBS top-level directory.

Then type the following:

```
pbs
```

Then when the master menu appears, select the module you wish to use from the master menu.

### Multiple Companies

If you have set up your software to process information for more than one company (see *Define Multiple Companies* in the *PBS Administration* documentation), you will be prompted to enter the Company-ID.

### Your Initials

You are prompted to enter your initials.

### Password

You will be prompted to enter your password. For security, the characters you type will not display on the screen. A user may reset his or her password during login to PBS.

Also, see the *PBS Users* chapter in the *PBS Administration* documentation for information on setting up initial passwords.

### Exiting PBS

To exit a PBS module, press <Esc> from the main menu. To exit a sub-menu, press <Esc> to return to a main menu.

Do not leave PBS open for long periods of time without using it. This is especially true if you are entering a new transaction or master record. If you are not entering new data or accessing PBS in any

way, close it and re-open later when needed. Lost connections to server data can cause damage to your data stored with PBS.

Always exit PBS before shutting down your computer. Failure to do so may result in lost data.

# Control Information

This chapter contains the following topics:

<a href="#">Introduction to Control Information</a>	.....
<a href="#">Reporting Periods</a>	.....
<a href="#">Sales Amount Brackets</a>	.....
<a href="#">A/R Interface Control Information</a>	.....
<a href="#">I/C Interface Control Information</a>	.....

## INTRODUCTION TO CONTROL INFORMATION

This selection allows you to set up basic control information about the way you use prior-year sales information in the PBS Sales Analysis.

Use the *A/R interface control info* selection to set up parameters, by which you will follow and analyze customer sales information. Use the *I/C interface control info* selection to set up parameters for the analysis of inventory item sales.

*Control information* selections in other modules affect the information that Sales Analysis reports can make available to you.

- If you have specified in *A/R Control information* that you do not use sales representatives, sales rep. reporting will not be available.
- A/R historical information that you may automatically load is impacted by your answers to two questions in *A/R Control information*; *Keep cust history* and *Keep invoice history*.
- Your answer to *Are cost of sales used*, in *I/C Control information*, will have an impact on many of the inventory reports.
- If you do not have Point of Sale installed the *POS Sales Analysis* sub menu selections will not have any data to access.

## REPORTING PERIODS

In both control selections, the first screen is mostly devoted to entering your reporting periods. It is assumed that these periods correspond (at least nominally) to the months of the year. You can keep as many as five years of history on file.

Once the S/A system is running, it accumulates new history by period using a transfer function for customer and/or item information.

If you have history available that predates installation of this module, you can load it retroactively. When you do this you are not required to break the history down by period but can load totals for an entire year. See the chapters titled *Customer Comparatives* and *Item Comparatives* for further information about loading prior-year information.

Once a fiscal year has been identified as containing yearly totals, it cannot be changed to monthly, and vice versa. Also, once a fiscal year has been loaded with either monthly or yearly totals it cannot be unloaded you can only wait until it purges itself naturally, which all years do at the age of five.

The reporting periods you define for your S/A customer reports must correspond to your periods in A/R. Similarly, the reporting periods you define for your S/A item reports must correspond to your I/C periods.

You define your reporting periods separately for each interface. If S/A is interfaced to both A/R and I/C, Passport strongly recommends (but does not require) that the periods in the *A/R Interface Control information* selection be identical to those in the *I/C Interface Control information* selection.

When you transfer data from an interfaced module (A/R or I/C), the information is assigned to the next available period having a period-end date nearest to the date of the transfer. This allows for cases where two successive period-end dates happen to lie within the same calendar month. For instance, March might end on Friday 2 April 2009 while April ended on Friday 30 April 2009.

## SALES AMOUNT BRACKETS

The second screen of each control selection is reserved for defining your sales amount levels or brackets.

On this screen you define sales brackets for your comparative reporting and assign a title to each bracket.

The total line of yearly comparative reports includes a count of the number of entries that fall within each of your defined sales brackets.

Customer-related brackets are defined in *A/R interface control info* and Item-related brackets are defined in *I/C interface control info* since a level of sales that might be high for a customer might be low for a single item (or vice versa, depending on the nature of your business).

Each bracket is defined by its lower and upper boundaries. Gaps between brackets are allowed, but not overlapping brackets. Suppose, for example, you define your customer sales brackets as follows:

1	Lowest	to	-\$100	Returns
2	-\$100	to	+\$100	No activity
3	\$500	to	10,000	Low volume
4	\$10,000	to	\$100,000	High volume

On your customer comparative report, a customer with no sales at all will be included in your level 2 bracket (No activity) and a customer with sales of \$12,345 will be included in your level 4 bracket (High volume). A customer with sales of \$234 will not appear on the report; neither will a customer with sales of \$345,678.

Amounts are entered in whole dollars giving the appearance of a one-penny overlap between two successive brackets. If a bracket breaks at ten thousand dollars, an amount of \$9,999.99 would be assigned to the lower bracket of the two, and an amount of \$10,000.00 to the higher bracket. The amount included in the third bracket, above, will include sales volumes from \$500.00 through \$9,999.99.

A bracket can have its lower bound equal to its upper bound; for instance a bracket of \$100 to \$100 is valid.

### If S/A interfaces to A/R and I/C

#### Select

*A/R interface cntrl information* or *I/C interface cntrl information* from the *Control information* menu.

### If S/A interfaces to only one of A/R or I/C

#### Select

*Control information* from the S/A menu.

## A/R INTERFACE CONTROL INFORMATION

This selection is not available if the Passport Business Solutions A/R module is not installed on your system.

Two screens are required to process A/R interface *Control information*. The information on file is not updated until both screens have been completed.

If you are using S/A comparatives, in A/R you must use the last day of the month as your closing date as S/A can only pull in data for one month at a time.

If A/R and I/C are both installed,

### Select

*A/R interface cntrl info* from the *Control information* menu.

If only A/R is installed,

### Select

*Control information* from the S/A menu.

## First Screen (A/R)

The following screen appears:

```
Control information (Customer comparatives)      XYZ Company
1. Keep customer comparatives ? Y
2. Start-up or regular mode ?
3. Number of report years
4. This fiscal year ends in: /

Y/N
```

Enter the following information:

### 1. Keep customer comparatives ?

Answer Y if you wish to keep customer comparatives for previous periods and years. This will allow you to use the *Customer comparatives* selection.

Answer N if you are only interested in analyzing current sales or if you cannot spare the disk space to keep historical information on file.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> to accept the default.

If you answer N, the remaining fields on this screen will display as N/A and you will be positioned at Field number to change ?. The second screen of this selection will not be presented.

## 2. Start-up or regular mode ?

Enter S for start-up when you are first setting up the module and you wish to *Load* historical information into your S/A archives. You must be in Start-up mode to *Load* historical information for customer comparatives.

After you have loaded all historical information for all fiscal years shown in Field # 6, change from Start-up mode to Regular mode. Once you have changed to Regular mode, you will use the *Transfer* function to archive period information on an on-going basis.

Enter R for regular mode when you are first setting up the module and you do not wish to load historical information but wish to begin accumulating historical information for future analysis.

Format	One letter, either S or R. The default is S.
Example	Press <Enter> to accept the default.

## 3. Number of report years

Enter the number of report years for which you intend to keep comparatives.

You can carry over as many years of A/R information as you wish (up to five), provided that you have the information available in your A/R module or are willing to load it manually.

You can change this value at any time.

- Decreasing the number of years does not destroy any history. You might have four years of history on file and want to run a report for a particular customer who has been with you only two years. You can change 4 to 2 temporarily and then restore it to 4 after printing the report.
- If you increase the number of years you must also load historical information, for the additional year, from A/R or manually.

If the number you enter here is less than five, you will be asked whether you wish to preserve or discard the oldest year on file at year-end. If you choose to preserve it, this field will automatically be increased by one.

Format	One digit, from 1 to 5. There is no default.
Example	Type: 3

#### 4. This fiscal year ends in:

Enter the last month of your current fiscal year. This date should correspond to the date on which you intend to close your year in A/R.

Format	99 For the month  9999 For the year  <i>All four digits of the year are required.</i>
Example	Type 9 and press <Enter>.  Then type: 2009 and press <Enter> again, to indicate September 2009.

The remainder of the screen will display, and the cursor will be positioned at *Field number to change* ?:



Notice that you still have not entered Field # 5. This can only be entered from *Field number to change* and does not display upon initial entry in the *Control information*.

#### 5. Last transfer date:

This field is not displayed when you first set up the Passport Business Solutions Sales Analysis.

This field will be set to the date of your last transfer of Accounts Receivable data to S/A via the *Load customer comparatives* selection, when in Start-up mode, or the *Transfer customer comparatives*, when in Regular mode. If you have not done so yet, this displays as *Zeroes*.

Format	MMDDYY
--------	--------

#### 6. Monthly/yearly data

Based on your entry in the preceding field, the system will display a table of the calendar months corresponding to the reporting periods of each fiscal year you intend to keep. There are twelve rows and n columns, where n is your entry for Field # 3.

For more information, refer to the *Reporting Periods* section in the Introduction to this chapter.

### The column headings

Each column has a heading indicating whether the history for that fiscal year is stored by period or by year, or is absent altogether. These display as (Mo), (Yr), or \*\* respectively. Initially these are all set to \*\*.

- When you Load a fiscal year from Invoice History that year's heading automatically becomes (Mo).
- When you Load a fiscal year from Customers, the heading automatically becomes (Yr).
- Until a fiscal year's column heading has changed to either (Mo) or (Yr), you cannot print reports for that year, nor can you use the *Enter customer comparatives* selection for that year's comparatives.
- Once a fiscal year's column heading has changed to either (Mo) or (Yr), you will be warned if you attempt to Load data for that fiscal year again.
- When you Transfer the last month of a fiscal year, a new column is automatically created with the heading (Mo). (The old columns all shift right).
- It is possible to change the heading to (Mo) or (Yr) manually as described below. Once you have changed it, you cannot change it back.

The *Load*, *Transfer*, and *Enter* selections are described in the [Customer Comparatives](#) chapter.

### To change the column headings manually

#### Note

Only do this if you do not have a source file available for that year's data and intend to load it all by hand (using the *Enter customer comparatives* selection). This will normally happen only at initial set-up of the module.

These headings are the only thing about the table that you can change, and that only from *Field number to change* ?.

The cursor will move in succession through the heading fields of each column marked \*\* (and only those columns). At each field, enter either M (for monthly), Y (for yearly), or Blank (if this fiscal year is to be excluded from the reports).

The current fiscal year can only be changed to (Mo).

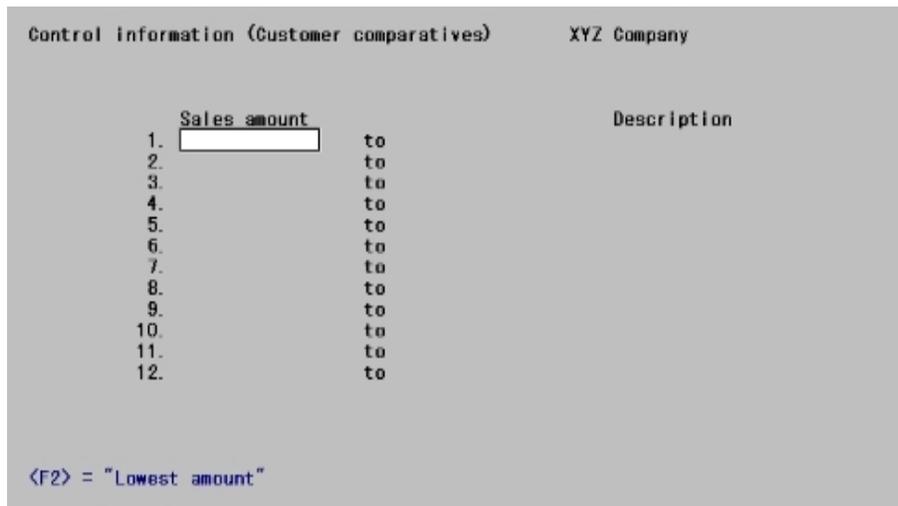
Format	One letter, either M, Y, or blank
Example	Do not change these headings.

### Field number to change ?

Make any needed changes. Press <Enter> to continue.

### Second Screen (A/R)

If you have answered Y to *Keep customer comparatives?*, the following screen will appear.



Enter the following information:

**1. through 12. Sales amount and Description**

For more information, refer to the *Sales Amount Brackets* section in the Introduction to this chapter.

You can enter up to twelve brackets, and must enter at least one.

For each field, the cursor moves first to the column defining the lower bound of the bracket, to the column for the upper bound and then to the description column.

In Add mode, after you enter each field the cursor proceeds to the next field, unless you indicate that this is the last field, or unless the upper bound of this bracket is *Highest*.

In Change mode, after each field the cursor returns to *Field number to change ?*, unless the field you have just defined overlaps the next field . In that case the cursor proceeds to that field to allow you to remove the overlap.

You cannot directly delete a field; however you can achieve the same result by entering new boundaries over the old fields.

**Lower bound**

Sales must be equal to or greater than this amount in order to be included in this bracket. Enter the sales amount defining the lower boundary. This must not be less than the upper boundary of the preceding bracket.

A zero entry will default to *Lowest*.

**Options**

You may also use one of the options:

<F2>	For Lowest in the first bracket only
<F2>	For finished entering break points, in bracket 2 to 12

Format	9999999999999- In the first bracket, there is no default; in subsequent brackets, the default value is the same as the upper bound of the previous bracket.
Example	[See the example that follows the Description below]

**Upper bound**

Sales must be less than this amount in order to be included in this bracket. Enter the sales amount defining the upper boundary. This must not be less than the lower boundary of this bracket.

A zero entry is valid, and displays as zero.

**Options**

You may also use the option:

<F2>	For <i>Highest</i> Amount
Format	9999999999999- There is no default.
Example	[See the example that follows the Description below]

**Description**

Enter a description of this bracket. This field is required.

Format	15 characters
Example	Enter six brackets as follows:

<i>Lowest</i>	0	Returned goods
0	1,000	Abysmal
1,000	20,000	Mediocre
20,000	100,000	Normal
100,000	500,000	Above average
500,000	<i>Highest</i>	Superlative

**Field number to change ?**

Make any needed changes. Press <Enter> to save your information and return to the main menu.

## I/C INTERFACE CONTROL INFORMATION

This selection is not available if the Passport Business Solutions I/C module is not installed on your system.

Two screens are required to process *I/C interface Control information*. The information on file is not updated until both screens have been completed.

If you are using *S/A* comparatives, in *I/C* you must use the last day of the month as your closing date as *S/A* can only pull in data for one month at a time.

If *A/R* and *I/C* are both installed,

### Select

*I/C interface cntrl info* from the *Control information* menu.

If only *I/C* is installed,

### Select

*Control information* from the *S/A* menu.

## First Screen (I/C)

The following screen appears:

The screenshot shows a terminal window with the following text:

```
Control information (Item comparatives)          XYZ Company
1. Keep item comparatives ?       4. Keep summary of deleted items ?
2. Start-up or regular mode                    5. This fiscal year ends in: /
3. Number of report years

Y/N
```

Enter the following information:

### 1. Keep item comparatives ?

Answer *Y* if you wish to keep item history for previous periods and years. This will allow you to use the *Item comparatives* selection.

Answer *N* if you are only interested in analyzing current sales or if you cannot spare the disk space to keep historical information on file.

Format	One letter, either Y or N. The default is Y
Example	Press <Enter> to accept the default.

If you answer N, the remaining fields on this screen will display as N/A and you will be positioned at *Field number to change ?*. The second screen of this selection will not be presented.

### 2. Start-up or regular mode ?

Enter S for start-up when you are first setting up the module and you wish to *Load* historical information into your S/A archives. You must be in Start-up mode to *Load* historical information for item comparatives.

After you have loaded all historical information for all fiscal years shown in Field # 6, change from Start-up mode to Regular mode. Once you have changed to Regular mode, you will use the *Transfer* function to archive period information on an on-going basis.

Enter R for regular mode when you are first setting up the module and you do not wish to load historical information but wish to begin accumulating historical information for future analysis.

Format	One letter, either S or R. The default is S.
Example	Press <Enter> to accept the default.

### 3. Number of report years

Enter the number of report years for which you intend to keep comparatives.

You can carry over as many years of I/C information as you wish (up to five), provided that you have the information available in your A/R module or are willing to load it manually.

You can change this value at any time.

- Decreasing the number of years does not destroy any history. You might have four years of history on file and want to run a report for a particular customer who has been with you only two years. You can change 4 to 2 temporarily and then restore it to 4 after printing the report.
- If you increase the number of years you must also load historical information, for the additional year, from A/R or manually.

If the number you enter here is less than five, you will be asked whether you wish to preserve or discard the oldest year on file at year-end. If you choose to preserve it, this field will automatically be increased by one.

Format	One digit, from 1 to 5. There is no default.
Example	Type: 3

#### 4. Keep summary of deleted items ?

Answer Y if you wish to retain a summary record on file for items which you no longer stock in inventory.

Answer N to drop such items from your analyses altogether. If you elect to drop these items, your inventory could be understated.

Format	One letter, either Y or N. The default is Y.
Example	Type: Y

#### 5. This fiscal year ends in:

Enter the last month of your current fiscal year. This date should correspond to the date on which you intend to close your year in I/C.

Format	99 For the month 9999 For the year. Note: All four digits of the year are required.
Example	Type:12 and press <Enter again to indicate December 2019

#### 6. Last transfer date:

This field is not displayed when you first set up the Passport Business Solutions Sales Analysis.

This field will be set to the date of your last transfer of the Inventory Control data to S/A via the *Load item comparatives* selection, when in Start-up mode, or the *Transfer item comparatives*, when in Regular mode. If you have not done so yet, this displays as *Zeroes*.

Format	MMDDYY
--------	--------

The remainder of the screen will display, and the cursor will be positioned at *Field number to change* ?:

Control information (Item comparatives)		XYZ Company		
1. Keep item comparatives ? Y		4. Keep summary of deleted items ? Y		
2. Start-up or regular mode Start-up		5. This fiscal year ends in: 9/1999		
3. Number of report years 3				
7. Data loaded:		FY 1999 (No)	FY 1998 (No)	FY 1997 (No)
Period 1	October	1998	1997	1996
Period 2	November	1998	1997	1996
Period 3	December	1998	1997	1996
Period 4	January	1999	1998	1997
Period 5	February	1999	1998	1997
Period 6	March	1999	1998	1997
Period 7	April	1999	1998	1997
Period 8	May	1999	1998	1997
Period 9	June	1999	1998	1997
Period 10	July	1999	1998	1997
Period 11	August	1999	1998	1997
Period 12	September	1999	1998	1997

Field number to change ?

### 7. Data loaded

Based on your entry in the preceding field, the system will display the calendar months corresponding to the reporting periods of each fiscal year you intend to keep. There are twelve rows and n columns, where n is your entry for Field # 3.

For more information, refer to the Reporting Periods section in the [Introduction to Control Information](#) to this chapter.

### The column headings

Each column has a heading indicating whether the history for that fiscal year has been loaded or not. If data has been loaded they will display as Yes. if not, they will display as No. Initially they are set to No.

- When you *Load* a fiscal year from Invoice History, that year’s heading automatically becomes (Yes).
- Until a fiscal year’s column heading has changed to (Yes), you cannot print reports for that year, nor can you use the Enter selection for that year’s comparatives.
- Once a fiscal year’s column heading has changed to (Yes), you will be warned if you attempt to Load data for that fiscal year again.
- When you *Transfer* the first month of the new fiscal year, a new column is automatically created.
- It is possible to change the heading to (Yes) manually as described below. Once you have changed it, you cannot change it back.

The *Load*, *Transfer*, and *Enter* selections are described in the Item Comparatives chapter.

### To change the column headings manually

**Note**

Only do this if you do not have a source file available for that year’s data and intend to load it all by hand (using the Enter selection). This will normally happen only at initial set-up of the module.



You cannot directly delete a field; however you can achieve the same result by entering new boundaries over the old fields.

### Lower bound

Sales must be equal to or greater than this amount in order to be included in this bracket. Enter the sales amount defining the lower boundary. This must not be less than the upper boundary of the preceding bracket.

A zero entry will default to lowest.

### Options

You may also use one of the options:

<F2>	For Lowest in the first bracket only.
<F2>	For finished entering break points in bracket 2 to 12
Format	999999999999- In the first bracket, there is no default; in subsequent brackets, the default value is the same as the upper bound of the previous bracket.
Example	[See the example that follows the Description below]

### Upper bound

Sales must be less than this amount in order to be included in this bracket. Enter the sales amount defining the upper boundary. This must not be less than the lower boundary of this bracket.

A zero entry is valid, and displays as zero.

### Options

You may also use the option:

<F2>	For <i>Highest Amount</i>
Format	999999999999- There is no default.
Example	[See the example that follows the Description below]

### Description

Enter a description of this bracket. This field is required.

Format	Up to 15 characters
Example	Enter seven brackets as follows:

<i>Lowest</i>		Returns
-500	500	Inactive
500	2,000	Unprofitable
2,000	50,000	Below average
50,000	200,000	Standard
200,000	500,000	Good
500,000	<i>Highest</i>	Excellent

**Field number to change ?**

Make any needed changes. Press <Enter> to save your information and return to the main menu.

# Common Features

This chapter contains the following topics:

- [Using Report Values](#) .....
- [Report/Summary/Labels/Export](#) .....
- [Report Selection Criteria - General](#) .....
- [Report Selection Criteria - Customer-specific](#) .....
- [Report selection criteria - Item-specific](#) .....
- [Inclusiveness Criteria](#) .....

## USING REPORT VALUES

If you have complex selection criteria for your reports, you may well want to file these criteria (or report values) away for future use. PBS Sales Analysis provides this capability. This feature not only saves you labor the next time you want the same report, it also ensures consistency.

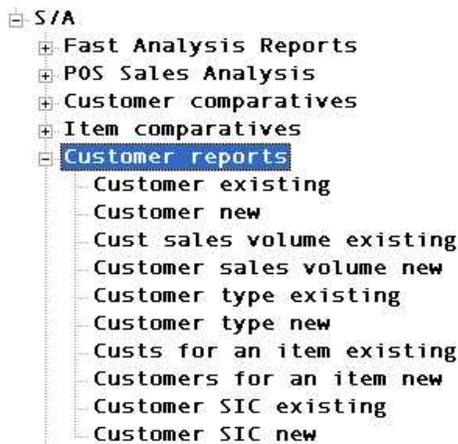
Report values may be stored for any selection on the menu, which generates reports. This includes all functions except a few specialized ones such as *Control information*. When you store report values you assign them a name and a description, by which you can refer to them afterward.

The Customer selection will be used as an example.

### Select

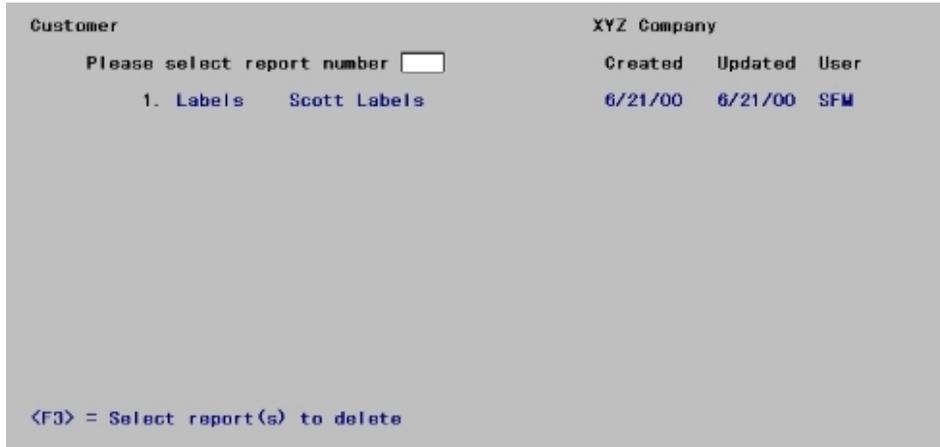
*Customer reports* from the S/A menu.

If stored report values exist for a selection, the name of the selection will be followed by ellipses (...). Choosing that selection will cause a submenu to appear with the two alternatives of *Existing* and *New*:



If there are no stored reports for a selection, the ellipses and the submenu do not appear. This will be the case if you have just installed the module.

Once you select to use existing reports, a screen displays your saved reports:



Existing report values are displayed in alphabetical sequence by their report numbers (regardless of the sequence in which they were created). There is a limit of sixteen saved report values for each selection.

From this screen, enter the number of the desired report (not the report number).

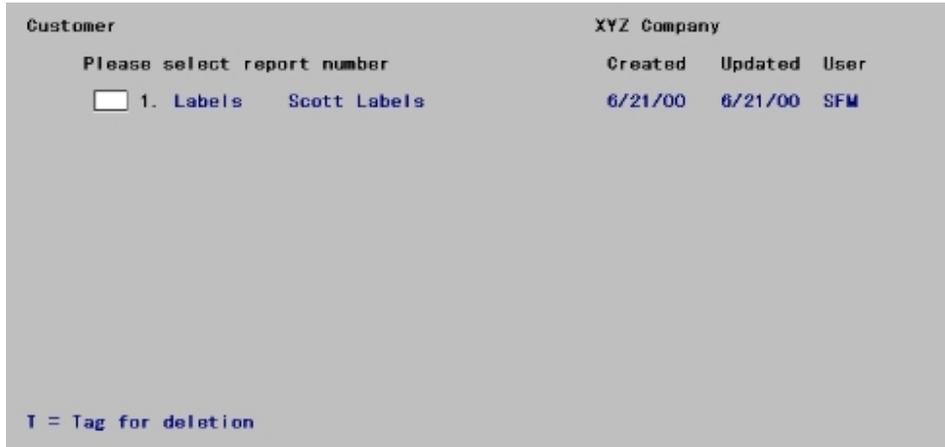
### Options

You may also use one of the options:

<F3>	To delete one or more reports.
<Esc>	To return to the previous menu.
Format	99
Example	Enter 1

### Deleting report values

If you have pressed <F3>, the screen now appears as follows:

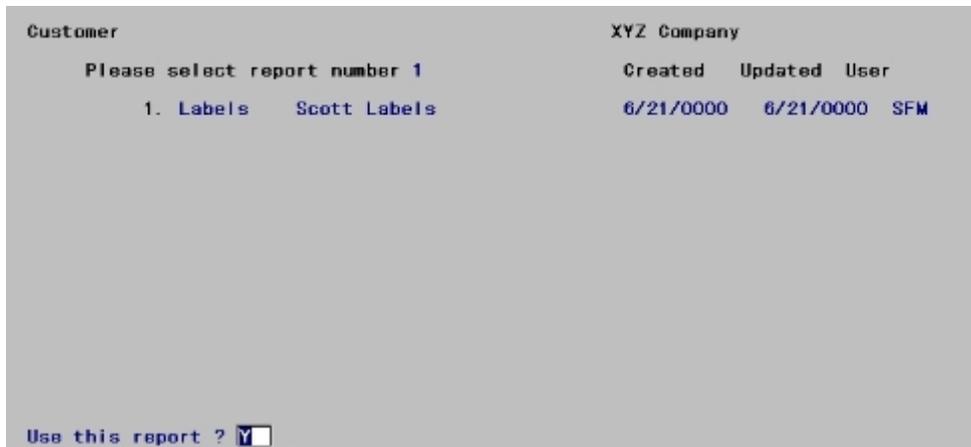


Multiple report values can be deleted at once from this screen. The cursor is positioned at the left of the first report, and can be moved down by pressing the <Enter> or <Down> keys. Enter T to tag a report for deletion. To untag a report, use the <Up> key.

Once you have gone past the last report on the screen, you are asked, *Are you sure you want to delete tagged reports (?)*. Answer Y to delete all tagged reports, or N to return to selecting a report.

**Use this report?**

If you have not pressed <F3>, the selected report is highlighted, and you are asked, *Use this report ?*:



Type Y to confirm, or N to select another report number.

Format	One letter, either Y or N.
Example	Type: Y

The following screen appears:



Notice that this screen is identical to the one described in the Customers chapter, except that:

- The report name and description appear in the heading.
- All of the fields have already been filled out.
- The cursor is positioned at *Field number to change ?*.

**Note**

In all the following chapters, the heading line is omitted from the screen illustrations. In the remainder of the documentation, the assumption is that you are creating new report values. The heading line will always appear on the screen when you are using existing report values as described in this chapter.

To use the report values just as they appear here, press <Enter> from *Field number to change ?*. You can also make changes to any field in the usual way. If you choose to do this, you may (if you wish) save these changed report values, either under this report number or under a new report number. In this way, one report can serve as a template for creating other reports.

**Field number to change ?**

Example

Type: 7 to access the Sales rep field  
Type: Jak in that field.

Press <Enter> to view the next screen:

Customer	XYZ Company
12. Include costs ?	(Not applicable)
13. Include margin ?	(Not applicable)
14. Include percent of sale ?	(Not applicable)
15. Include percent of margin ?	(Not applicable)
16. Include margin percentage ?	(Not applicable)
17. Percentages based on:	(Not applicable)
18. Include contact ?	Yes
19. Minimum sales amount	"None"
20. Customers with zero dollar sales	Include
21. Print a cover page ?	No

<SF1> = Previous screen  
 Field number to change ?

As in the first screen, the fields are already filled out and the cursor is positioned at *Field number to change ?*.

**Field number to change ?**

Press <Enter>. If these are new report values, or if they are existing report values which you have changed, you will be asked:

**Save new report values ?**

If this is a new report and you answer N, the report values used for this report will not be saved.

If this is an existing report and you answer N, the existing report values will not be altered.

If you answer Y, a box will appear on the screen for you to enter a report name and description.

Format	One letter, either Y or N.
Example	Type: Y

The screen now appears as follows:

Customer	XYZ Company
12. Include costs ?	(Not applicable)
13. Include margin ?	(Not applicable)
14. Include percent of sale ?	(Not applicable)
15. Include percent of margin ?	(Not applicable)
16. Include margin percentage ?	(Not applicable)
17. Percentages based on:	(Not applicable)
18. Include contact ?	Yes
19. Minimum sales amount	"None"
20. Customers with zero do	Include
21. Print a cover page ?	No

Save report

Report name:

Description:

Are you sure ?

Save new report values ? Y

The report name and number appear on the cover page of each report, but not on the page headings.

### Report name

Enter a name for the new report.

If you are working with new report values, there is no default for this field. Whatever report name you enter becomes a new entry in the list of stored report values for this selection. If you already have sixteen entries, you may not enter a new one.

If you are working with existing report values, the existing name appears as the default.

- If you leave this name unchanged, the new values you have supplied overlay the existing values for this report. No new entry is created (you can change the description if you wish).
- If you change the name to something which is not already on file, the existing report values remain on file, and a new entry is created under the new name (provided there are not already sixteen entries on file).
- If you change the name to something, which is already on file, you are warned, This report name currently being used. If you choose to use it anyway, the new report values for that name overlay the ones already on file.

Format	Up to 8 letters
Example	Type: John

### Description

Enter a description for the new report. This field is required.

Format	Up to 25 letters
Example	Type: Jonathan Harris's Sales

### Are you sure ?

Answer N to change the information, or Y to accept it.

Format	One letter, either Y or N
Example	Type: Y

At this point, the report values will be saved and will be available for use on subsequent reports.

You will then be asked to select a printer, and the requested report will print normally.

Note that S/A, unlike other modules, prints a report (consisting only of a cover page) even when there are no entries on file meeting the stated selection criteria. This feature lets you define report values for an anticipated future report even when no information is currently available for such a

report. If you do not wish to print the report at this time (because you only want to store report values for future use), press <Esc> from the printer selection menu.

## REPORT/SUMMARY/LABELS/EXPORT

For each selection that generates reports, the first field of the first screen is this:

### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create. Your choices are:

Choice	Displays as	Description
R	Report	The report will be printed in full, including both detail lines, subtotals, and totals.
S	Summary	The report will be printed as a summary. Detail lines will be omitted, but subtotals and totals will print. This feature corresponds to brief format in other selections.
L	Labels	Only labels will be printed.
E	Export	The report will be exported to disk. This feature is meant for use with spreadsheet programs.

Your choices for the remainder of the selection will vary slightly depending on which report type you have chosen. These differences will be noted as they occur.

Format	One letter from the list above.
Example	Type: R

### Cover page

A separate cover page prints at the beginning of each report or summary. The selection criteria you have entered for the report are printed on the cover page.

The cover page is available as a separate one-page report even when you are printing labels or using the export feature. The last field of the selection will ask you, *Print a cover page ?*. Printing a separate cover page is recommended particularly when you are not saving the report values, since otherwise you would have no audit trail of the selection criteria used for the labels or the export file.

### When printing labels

The label feature supplements the label-printing capability already present in the I/C and A/R modules, and offers you more sophisticated choices for selecting and sequencing labels.

For some selections, such as [Customer Comparatives](#), printing labels is not meaningful. This field then appears as Report/Summary/Export.

Labels contain only addresses, not amounts or quantities, so many of the fields on the screen do not apply when you print labels particularly the ones which ask Include this? or Include that?. These

fields simply display as (*Not applicable*) and the cursor skips past them. The fields allowing you to restrict your selection work for labels, just as they do for reports. You can for instance send a mailing to your top hundred customers.

Two additional questions are asked only when printing labels:

**1 or 2 columns ?**

Enter whether you are using single-column or double-column label forms.

Format	One number, either 1 or 2
Example	Does not occur in this example as you are not printing labels

**Overflow drop line ?**

If you have chosen to print labels, you are asked which line is to be dropped when the address overflows the available space. Your choices are:

1	Drop address line one.
2	Drop address line two.
C	Drop the country line.

Format	One character from the list above
Example	Does not occur in this example as you are not printing labels

If you are printing to a Laser printer you will be asked to enter an optional adjustment to the top and left margins. If the labels do not align properly you will also be asked to enter the # of labels in one vertical column down the page.

**When exporting a report**

Exported reports can be read directly by most popular spreadsheet programs. The exported file includes both detail and total lines (that is, what gets exported is the report, not the summary). It is a standard comma-separated-variable line-sequential file, with each record corresponding to a single detail or total line of the report. Trailing spaces are suppressed.

The term *export* in this context has no connection with the same word as used in the Data (File) Utilities.

The export feature should also be distinguished from the spooling feature, accessed by choosing the Print to disk selection from the printer menu. Although both features direct a report to disk instead of printing it immediately, the purpose is very different in each case. Spooling merely postpones printing a report until a more convenient time. Exporting lets you transfer the report outside the software altogether.

Each menu selection exports a file under a name specific to that selection. If you are exporting more than one report at a time for the same selection, be careful to move, copy, or rename each exported file before proceeding to the next. Otherwise each new file will overwrite its predecessor.

Files are exported to the top-level directory.

The file names for each selection are listed in the table following. <??> represents the company code.

Selection	Period	File name
Customer		??CUSTMR.CSV
Customer sales volume		??CUSVOL.CSV
Customer type		??CUSTYP.CSV
Customer SIC		??CUSSIC.CSV
Customers for an item		??ITMCUS.CSV
Item		??ITEMS1.CSV
Item sales volume		??ITMVOL.CSV
Item category		??ITMCAT.CSV
Items for a customer		??CUSITM.CSV
Sales rep, actual		??SLSACT.CSV
Sales rep, responsible		??SLSREP.CSV
Sales territory		??SLSTER.CSV
State		??STATES.CSV
ZIP code		??ZIPCOD.CSV
Customer comparatives	Year	??CCYEAR.CSV
	Quarter	??CCQTL.CSV
	Month	??CCMONL.CSV
Item comparatives	Year	??IAYEAR.CSV
	Quarter	??AIQTL.CSV
	Month	??IAMONL.CSV
Services for a customer		??CUS SVC.CSV
Customers for a service		??SVCCUS.CSV

You will be reminded of the file name each time you export a report (after pressing <Enter> at *Field number to change* ?).

## REPORT SELECTION CRITERIA - GENERAL

The fields in this section occur on both item- and customer-related screens. The next two sections describe fields restricted to one or the other of these.

All of these fields are meant to reduce the number of entries printed on the report so that you only get the ones you are interested in. If you specify more than one of these criteria, an entry must meet all of your restrictions in order to be printed.

### Number of <?????> for each <?????>

<M>	More than (# ????'s)
<F>	Fewer than (# ????'s)
<F5>	All

This report parameter exists on various reports. You can use this parameter to restrict the records on the report to customers, items, etc., that have had more than a set amount of activity or less than a set amount of activity.

For example, you may be printing the Customer Type report. When filling out the parameter screens to print the report, you will come to the question *Number of Customers* for each type and you will have the options listed above. If you want the report to only print for customer types that have more than 2 customers associated with them, you would pick M for more than and enter the number 2.

If you wanted the report to print for only customer types that have less than 2 customers associated with them, you would pick F for fewer than and enter the number 2.

Another example would be if you were printing the Customers for an Item report. When filling out the report parameters screens you would come to the question *Number of Customers for Each Item* and you would have the options listed above. If you wanted the report to print for only items purchased by more than 10 customers, you would choose M for more than and enter the number 10.

There are two exceptions to the above description. When you print the Customers Sales Volume report or the Item Sales Volume report, you get to choose a sort order. If you choose to sort the Customer Sales Volume report by *Volume, Customer #*, this report parameter will be *Number of customers*. In this case, you would enter the maximum # of customers you want to include on the report.

If you choose to sort the Item Sales Volume report by *Volume, Item #*, this report parameter will be *Number of items for each warehouse*. In this case, you would enter the maximum # of items you want to include on the report. When this parameter is used in this fashion, it allows you to restrict the report to your top 10, 20, 30, 100, etc., customers or items.

Format	One letter either M or F, there is no default.
Example	Press <M> then type the number.

Full instructions on entering these fields appear only in these sections. In other chapters, the fields are merely listed with a cross-reference to the appropriate page of this chapter.

### Minimum sales amount

You can reduce the size of the report by eliminating entries for casual or one-time entries that is, customers or items whose sales amount is below some threshold. Enter the threshold sales amount.

### Options

You may also use the option:

<F7>	To include entries regardless of sales amount (none will display).
------	--

A negative (but not a zero) amount is allowed. This selects only entries with credit balances. For instance, an entry of -500 would select only entries with a negative amount of at least \$500.

Format	999999999999-
Example	Press <F7>

### Time period

If you have entered *none* for Minimum sales amount ?, this field does not appear. However, if you have specified some nonzero minimum sales amount, you must now specify what time period this refers to. The details of how you do this vary slightly, depending on the information available and the nature of the selection.

### For customer-related reports:

Enter one letter from this list:

P	The threshold is the sales amount for the current period to date.
Y	The threshold is the sales amount for the current year to date.
L	The threshold is the sales amount for the entire last year.

Format	One letter from the list above. There is no default.
Example	This field does not occur as you chose <i>none</i> for Minimum sales amount

### For item-related reports:

Enter one letter from this list:

P	The threshold is the sales amount for the current period to date.
Y	The threshold is the sales amount for the current year to date.

Format	One letter from the list above. There is no default.
Example	This field does not occur as you chose none for Minimum sales amount

**For item or customer comparatives:**

Enter the year which the minimum sales amount refers to. This must be one of the years for which you are printing the report.

**Options**

You may also use the option:

<F5>	For <i>All</i> years
------	----------------------

Even when printing monthly or quarterly comparatives, the minimum sales amount refers to the yearly total sales. In order for an entry to be selected, the minimum sales for the selected year must meet the stated threshold amount. If *All* was chosen, it is sufficient for any one of the years being reported to meet the threshold.

Format	YY
Example	This field does not occur as you chose none for Minimum sales amount.

**{Customers \ Items \ Services} with zero dollar sales**

This field is meaningful only if you have entered *None* as the Minimum sales amount. If not, it displays as (*Not applicable*) and may not be entered.

This field displays as Customers with zero dollar sales in customer-related selections. In item-related selections, it displays as either Items with zero dollar sales or Services with zero dollar sales (depending on whether the item is a good or a service). The idea is the same in both cases.

If you have chosen no minimum sales amount, you can now select how to handle customers or items with no sales amount at all. Choose one of the following:

I	Include zero-sale entries in the report (along with others meeting the selection criteria).
E	Exclude zero-sale entries from the report.
O	Include only zero-sale entries in the report.

Format	One letter from the list above. There is no default.
Example	Type: I

### Time period

If you have chosen to Include entries whether or not they are zero, there is no more to be said on the subject. However, if you want to either Exclude zero-sale entries altogether or to include Only such entries, you must further specify what time period you are referring to. The details of how you do this vary slightly, depending on the information available.

### For customer-related reports:

Enter one letter from this list:

P	Sales must be zero for the current period to date.
Y	Sales must be zero for the current year to date.
L	Sales must have been zero for the entire last year.
Format	One letter from the list above. There is no default.
Example	This field does not occur as you chose to Include zero-sale entries

### For item-related reports:

Enter one letter from this list:

P	Sales must be zero for the current period to date.
Y	Sales must be zero for the current year to date.
Format	One letter from the list above. There is no default.
Example	This field does not occur as you chose to Include zero-sale entries

### For item or customer comparatives:

Enter the year you want to test for zero sales. This must be one of the years for which you are printing the report.

### Options

You may also use the option:

<F5>	For <i>All</i> years
------	----------------------

Regardless of whether you are printing monthly, quarterly, or yearly comparatives, the total yearly sales for the specified year must be zero in order to meet the requirement. If *All* is specified, every year for which the report is being printed must have experienced zero sales in order for this entry to be excluded (if E) or included (if O).

Format	YY
Example	This field does not occur as you chose to Include zero-sale entries

**1. Report/Summary/Labels/Export**

Enter the type of report you wish to create. For a full discussion of this feature.

**2. Starting customer and**

**3. Ending customer**

Enter the range of customers you wish to include. Follow the screen directions. Neither customer need be on file, but between the two of them the range should enclose at least one customer.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i>

## REPORT SELECTION CRITERIA - CUSTOMER-SPECIFIC

The fields in this section occur in most of the A/R related selections, often on the first screen.

### 4. Customer type

In A/R, you can assign a *category* or *type* to each customer. For instance, you might have two types of customers: wholesale and retail. These types can be whatever you choose. Their purpose is to allow you to group customers by categories meaningful to your company.

There is no standard list of valid customer types: you can assign any type code you want to any customer.

Customer types are an optional feature, and even if you have chosen to take advantage of them you may not have done so for all of customers.

Information is classified according to the customer type currently in effect. If you reorganize your classification, your historical information automatically reflects the reorganization.

The customer type must already be on file for at least one customer.

A blank entry in this field is valid, and includes only those customers who are not assigned to any type. An <F5> entry also includes customers with blank customer types.

Enter the customer type you wish to include.

### Options

You may also use the option:

<F5>	For <i>All</i> customer types (or if you do not use customer types)
Format	Five characters
Example	Press <F5>.

### 5. State

Enter the postal abbreviation of the state you wish to include.

### Options

You may also use the option:

<F5>	For <i>All</i> states
------	-----------------------

An entry in this field is required. However, no test is made that the abbreviation is valid. This lets you use this field for Canadian provinces or other foreign geographical designations.

Sales are assigned to a state on the basis of a customer's current billing address (not shipping address).

A blank entry in this field is valid, and includes only those customers who are not assigned to any state. An <F5> entry also includes customers with blank state codes.

Format	Two letters. Lower-case is converted to upper.
Example	Press <F5>

## 6. SIC

The Standard Industry Code is optional. If you assign the correct code to each customer, you can use this feature to analyze your success in different markets and to compare your reports with current financial information in the public press.

This is a somewhat more rigorous and standardized way of classifying your customers than the customer type. You can use both methods if you want to.

The system does not maintain a list of standard SIC's, so you are free to use this field for any desired classification scheme.

Information is classified according to the SIC currently in effect for a customer. If this changes, your historical information automatically reflects the change.

If you wish to restrict the report to customers with a single SIC, enter that SIC here. This is a required field and cannot be left blank. If you have not assigned SIC's in your *A/R Customer* selection, press <F5>.

A blank entry in this field is valid, and includes only those customers who are not assigned to any SIC. An <F5> entry also includes customers with blank SIC's.

## Options

You may also use the option:

<F5>	For <i>All</i> SIC's (or if you do not use SIC's)
------	---

Format	6 letters. Lower-case is converted to upper.
Example	Press <F5>

## 7. Sales rep

If you have specified (in *A/R Control information*) that you do not use sales representatives, this field displays as (*Not applicable*) and may not be entered.

Otherwise, an entry in this field is required. If you wish the report restricted to customers for a single sales representative, enter that representative's code here.

## Options

You may also use the option:

<F5>	For <i>All</i> sales representatives
------	--------------------------------------

Except in the Sales rep, actual selection, entries are selected for inclusion on the basis of the salesman currently responsible for a customer regardless of whose number appears on the invoice, or who was responsible at the time.

Salesmen come and go, so the code you enter here need not be on file in the *A/R Sales rep* selection. If it is, that salesman's name will display next to his code. Otherwise Sales rep not on file will display.

Note that if you use this report primarily to assess the performance of your sales representatives, you should retire a salesman's number whenever he leaves your service. If you are more concerned with continuity of reporting, without regard to what individual is currently servicing those customers, newly-hired sales representatives should be assigned the same code used by their predecessors.

Format	Three letters. Lowercase is converted to upper.
Example	Press <F5>

## 8. Sales territory

The territory code is any code you choose to assign to the customer.

- This feature is optional. Most people who use it assign the code on a geographical basis (hence the name), but this is not a requirement.
- No list of standard territory codes is maintained. Any code can be assigned to any customer.
- If you use both territory codes and sales representatives, you will probably want to assign each sales representative to one or more territories, or vice versa. The system does not maintain any fixed list of such relationships.

Information is classified according to the customer's current sales territory, which may not be the same as his sales territory at the time of the sale.

A blank entry in this field is valid, and includes only those customers who are not assigned to any sales territory. An <F5> entry also includes customers with blank sales territories.

If you wish the report restricted to customers for a single sales territory, enter that territory here.

## Options

You may also use the option

<F5>	For <i>All</i> sales territories. Also use this option if you do not use sales territories.
------	---

### Reporting period

Format	Three letters. Lowercase is converted to upper.
Example	Press <F5>.

Selections that derive their information from A/R Invoice History allow selection by reporting period.

You might for instance want to compare sales reps for promotion, awards, etc., so you could set period 1 to the current sales year, period 2 to the period when sales are the easiest in your business, period 3 to the worst sales period, and period 4 to all prior time (010190 through 123199).

Reporting periods are defined by a beginning and ending date. These dates are inclusive. If you do not want a gap between two periods, the beginning of the second must be the day after the ending date of the first.

If you enter fewer than four periods, press <Enter> at the next starting date to go on to the next field.

Reporting periods are required to correspond to neither your accounting periods nor to calendar months. Sales are selected for inclusion in the report by matching their invoice date to this date range. Reporting periods can overlap, or there can be gaps between them. This allows you (for example) to examine week-to-date, period-to-date, quarter-to-date, and same-week-last-year sales on the same report.

The program does not check the last purge date of your invoice history. It is your responsibility to ensure that all specified reporting periods are wholly contained within the range of dates spanned by your Invoice History file.

If you select more than one reporting period and the report is being printed in sales volume sequence, you will be asked (in a subsequent field) which of these periods to use for sorting purposes. If you have selected only one reporting period, this subsequent field will display as (*Not applicable*) and need not be entered. Reporting periods *may not* overlap one another.

Enter from one to four reporting periods.

Format	Up to four reporting periods, each on a separate line and each represented as a range of dates in the format MMDDYY through MMDDYY.
Example	Enter 10117 through 33117 on the first line. Press <Enter> from the first field of the next line to terminate entry.

## REPORT SELECTION CRITERIA - ITEM-SPECIFIC

The fields in this section occur in most of the I/C related selections, often on the first screen.

### Category

Categories are codes that you can use to classify items in a manner meaningful to your company. A category can be further classified into sub-categories.

Categories are an optional feature. They must be defined in IC first, and then assigned to inventory items.

Information is classified according to the category and sub-category currently in effect. If you reorganize your classification, your historical information automatically reflects the reorganization.

Enter the category for which you wish to show items on the report.

### Options

You may also use the options:

<F5>	For <i>All</i> categories (including those not in any category)
Blank	For only those items not in any category

Category codes are an optional feature. If you do not use them, always choose <F5>.

Format	Five characters
Example	Press <F5>.

### Sub-category

This field displays as (*Not applicable*) and may not be entered if you have left the preceding field blank. An item cannot belong to one subcategory of a nonexistent category.

Enter the sub-category for which you wish to show items.

### Options

You may also use the options:

<F5>	For <i>All</i> sub-categories in the selected category (including those which have no sub-category)
Blank	For only those items in the selected category which do not belong to any sub-category

Sub-categories are optional. If you do not use them, always choose <F5>.

Format	Five characters
Example	Press <F5>.

### Inventory account number

You can restrict the report to items for a single inventory account, or print items without regard to their inventory account.

An item's inventory account number rarely changes (because of the effect on inventory valuation). But if it does, be aware that entries appear on the report on the basis of the item's current inventory account number.

Enter the inventory account for which to print items.

### Options

You may also use the options:

<F1>	For the next inventory account on file
<SF1>	For the previous inventory account
<F2>	For the default inventory account from I/C <i>Control information</i>
<F5>	To print items for <i>All</i> inventory accounts

Format	Your standard account number format, in segments, as defined in Company information
Example	Press <F5>.

### ABC code

This code assigns a value of A, B, or C to an inventory item, depending on how important it is relative to the other items in inventory. This can be based on either sales, cost, or margin. You can assign this code to individual items manually, calculate it at intervals for all items at once, or ignore it altogether.

The code is computed on the basis of a item's activity at all warehouses and locations, so does not vary from one to the other.

An item is selected for inclusion in the report according to the ABC code currently in effect for that item.

A blank entry in this field is valid, and includes only those items, which have not been assigned any ABC code. An <F5> entry also includes items with blank ABC codes.

### Options

Enter an ABC code, or use the option:

<F5>	For <i>All</i> ABC codes. Choose this option if you do not use ABC codes.
------	---

Format	One letter, either A, B, C, or blank. There is no default.
Example	Press <F5>.

### Warehouse

If you are not using multi-warehouse the field displays as not applicable.

I/C optionally allows you to sell items from multiple warehouses. A warehouse may correspond to a physical warehouse, or it may exist only on paper. For instance, if you do business under two different names you may find it convenient to define a warehouse for each corporate identity, even though all merchandise is shipped from the same physical warehouse.

If you print a report for a single warehouse, the effect is to include all items on the report which are currently sold from that warehouse regardless of which warehouse appeared on the invoice.

Enter the code of a valid warehouse.

### Options

You may also use the options:

<F5>	For <i>All</i> warehouses
Blank	For the Central warehouse

Format	Two characters
Example	Press <F1>.

### Vendor number

Each item may have a prime vendor associated with it. I/C requires a vendor number if A/P is interfaced. Otherwise, it is optional. You can use this feature to obtain reports based on vendor.

A blank entry in this field is valid, and includes only those items, which have not been assigned any vendor number. An <F5> entry also includes items with blank vendor numbers.

It is recognized that you may purchase the same item from more than one vendor. However, only the prime vendor is used as the basis for sales analysis.

Even if you are using the A/P module, your entry here is not required to be a valid vendor from the A/P Vendor file. Even if it is, the vendor name is not displayed.

### Options

Enter a vendor number, or use the option:

<F5>	For <i>All</i> vendors. Use this option if you do not assign vendors to items in I/C.
------	---

Format	Six characters
Example	Press <F5>.

## INCLUSIVENESS CRITERIA

The fields in this section occur in many item- and customer-related selections, often on the second screen. They do not affect which entries are printed on the report, only what information is printed for each entry.

Full instructions on entering these fields appear only in this section. In other chapters, the field is merely listed with a cross-reference to this section.

### 9. Include period-to-date ?

### 10. Include year-to-date ? and

### 11. Include last year ?

If you have chosen to print labels, these fields display as *(Not applicable)* and may not be entered.

You can answer Y to *Include last year ?* even if *Control information* specifies that *Number of report years* is 1.

You can include any of these three types of historical information on the report, but you must include at least one of them.

Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field to accept the default.

### 12. Include costs ? and

### 13. Include margin ?

If you have chosen to print labels, these fields display as *(Not applicable)* and may not be entered.

The report always includes the sale amount. You can also include either or both the cost and the margin by responding Y to these questions.

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field to accept the default.

### 14. Include percent of sale ? and

### 15. Include percent of margin ?

If you have chosen to print labels, these fields display as *(Not applicable)* and may not be entered.

Otherwise, enter Y for each percent you want to include on the report. These percentages represent the ratio between this entry's sales or margin (respectively) and the total sales or margin.

You will be asked (in the Percentage based on: field below) whether the comparison is based on the total for all entries in the system, or only for those entries included in this report.

Format	One letter, at each field, either Y or N. The default is N.
Example	Press <Enter> at each field to accept the default.

**16. Percentage based on:**

If you have chosen to print labels, or if you have answered N to both questions *Include percent of sale ?* and *Include percent of margin ?*, this field displays as *(Not applicable)* and may not be entered.

S/A considers margin percent to be a percentage of the sale amount (not of the cost amount).

Otherwise, enter one of the following:

S	To calculate the percentage on the basis of only those lines selected for this report.
E	To calculate the percentage on the basis of the entire data base.
Format	One letter of the two above. The default is S.
Example	Press <Enter> to accept the default.

**18. Include quantity returned ?**

Answer Y to show quantity returned figures (in addition to quantity sold).

Format	One letter, either Y or N. The default is N.
Example	Type: Y

**19. Include contact and phone # ?**

If you have chosen to print labels, this field displays as *Include contact*. The contact's name, but not his phone number, may appear on a label.

If you have chosen to print a summary report, this field displays as *(Not applicable)* and may not be entered.

Some reports allow you to choose contact and phone number individually, and to select the first or second contact name or phone number.

Enter Y to include the first contact name and phone number of each customer.

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**20. Include page breaks ?**

This field applies only to reports organized with major control breaks. For example, when you are printing the Customer Sales Volume report in sales territory sequence. You may wish to begin each territory on a new page. If so, answer Y to this question. Of course, this lengthens the report somewhat.

If you have chosen (in the Sort order field) to print the report without control breaks, this field displays as (*Not applicable*) and may not be entered. This is also the case if you are printing a summary report, if you are printing labels, or if you are exporting the report.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> to accept the default.

### 21. Include subtotals on detail pages ?

This field applies only to reports organized with major control breaks. If you have chosen (in the Sort order field) to print the report without control breaks, this field displays as (*Not applicable*) and may not be entered. An example of a report printed with control breaks would be printing the customer Sales Volume Report and choosing a sort order of Sales Rep Volume, customer #. Choosing a sort order of Volume customer # would be considered no control breaks. This is also the case if you are printing a summary report or if you are printing labels.

Answer N to print only grand totals for the report. Answer Y to print subtotals after each control break.

There is no implication that subtotals are included on all detail pages. They only do so following a control break.

Note that you can obtain subtotals for an exported report if desired.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> to accept the default.

### 22. Item cost

Enter the type of cost to be shown (and used in calculating margin). This must be one of the following: R for replacement cost, A for average cost, or S for standard cost. The latter is only available if you have chosen the Standard Cost inventory valuation method in I/C.

### Options

You may also use the option:

<F5>	For None. No costs will be shown (and no margins can be calculated).
Format	One letter, either R, S, or A. There is no default.
Example	Type:R. Press <Enter>

The last field of the selection will ask you, *Print a cover page ?*. Printing a separate cover page is recommended particularly when you are not saving the report values, since otherwise you would have no audit trail of the selection criteria used for the labels or the export file.

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> to accept the default.

# Customer

This chapter contains the following topic:

[Selecting Customer](#) .....

## SELECTING CUSTOMER

This report shows period-to-date, year-to-date, and last year sales, cost of sales, gross profit figures, and margin percent for each customer in Accounts Receivable. Each customer's percent of total sales and percent of total gross profit is also shown.

If you are not using A/R, you may skip this chapter.

### Select

*Customer existing* or *Customer new* from *Customer reports* menu.

Two screens are needed to accommodate this selection.

See a sample [Sales Analysis by Customer](#) report in the *Sample Reports* appendix.

## Customer First Screen

The screen appears as follows:

The screenshot shows a terminal-style interface with the following content:

```
Customer                                XYZ Company

1. Report/Summary/Labels/Export      [ ]
2. Starting customer
3. Ending customer

4. Customer type
5. State
6. SIC
7. Sales Rep
8. Sales Territory

9. Include Period-to-date ?
10. Include Year-to-date ?
11. Include Last year ?

R = Report      S = Summary      L = Labels      E = Export
```

Enter the information as follows:

### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R. Press <Enter>.

## 2. Starting customer and

### 3. Ending customer

Enter the range of customers you wish to include. Follow the screen directions. Neither customer need be on file, but between the two of them the range should enclose at least one customer.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 4. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>.

### 5. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>.

### 6. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>.

### 7. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>.

### 8. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>.

- 9. Include period-to-date ?
- 10. Include year-to-date ? and
- 11. Include last year ?

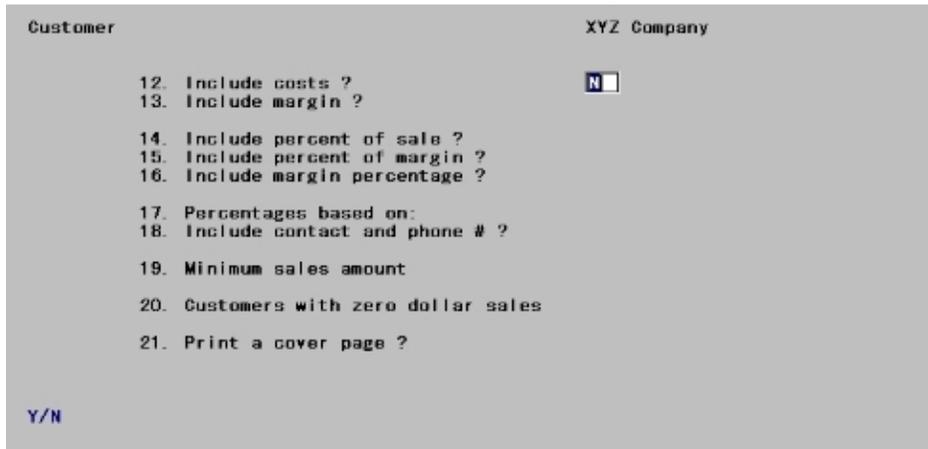
Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

### Customer Second Screen

The second screen appears as follows:



Enter the information as follows:

- 12. Include costs ? and
- 13. Include margin ?

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

- 14. Include percent of sale ? and
- 15. Include percent of margin ?

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**16. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**17. Percentage based on**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**18. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>.

**19. Minimum sales amount**

Format	9999999999-
Example	Press <F7>.

**20. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I

**21. Print a cover page ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>.

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Prior to actual printing, there will be a period of processing while data is extracted and sorted. While this happens, a running display of the current record processed will appear on the screen.

# Customer Sales Volume

This chapter contains the following topic:

[Selecting Customer Sales Volume](#) .....

## SELECTING CUSTOMER SALES VOLUME

This report lists customers in order by sales volume. It is based data in A/R Customers. It shows sales, costs of sales, gross profit figures, and margin percent, as well as each customer's percent of total sales and percent of total gross profit. These amounts are shown for period-to-date, year-to-date, and last year.

If you are not using A/R, skip this chapter.

Customers can be printed in order by either customer sales volume per sales representative, or customer sales volume per sales territory.

Optionally, you can specify a minimum dollar volume or you can specify to print only the top *n* customers.

See a sample [Sales Analysis by Customer Sales Volume](#) report in the *Sample Reports* appendix.

### Select

*Customer sales volume existing* or *Customer sales volume* from the *Customer reports* menu.

Two screens are required to accommodate this selection.

### Customer Sales Volume First Screen

The screen appears as follows:

```
Customer sales volume                                XYZ Company

1. Report/Summary/Labels/Export      
2. Starting customer
3. Ending customer
4. Sales rep
5. Sales territory
6. SIC
7. State
8. Customer type
9. Include period-to-date ?
10. Include year-to-date ?
11. Include last year ?

R = Report      S = Summary      L = Labels      E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create. Refer to the Common Features chapter.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R. Press <Enter>.

## 2. Starting customer and

### 3. Ending customer

Enter the range of customers you wish included in the report. Follow the screen directions. Neither customer need be on file, but between the two of them the range should enclose at least one customer.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 4. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

### 5. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

### 6. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>

### 7. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

### 8. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

- 9. Include period-to-date ?
- 10. Include year-to-date ? and
- 11. Include last year ?

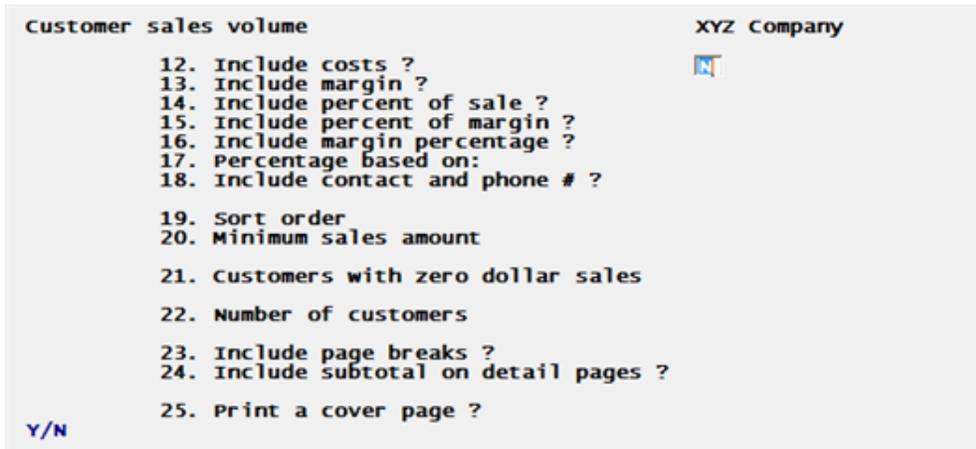
Format	One letter at each field, either Y or N. The default is Y.
Example	Press <Enter> at each field for the default.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

### Customer Sales Volume Second Screen

The second screen appears as follows:



Enter the information as follows:

- 12. Include costs ? and
- 13. Include margin ?

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

- 14. Include percent of sale ? and
- 15. Include percent of margin ?

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**16. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**17. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> for the default.

**18. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y. Then press <Enter>.

**19. Sort order**

Enter either

V	To show customers in descending order by sales volume.
S	To show customers in ascending order by sales representative and within that in descending order by sales volume. The sales representative concerned is the one responsible for the sale, not the actual sales representative.
T	To show customers in ascending order by territory code and within that in descending order by sales volume.

In each case, the sort order is based on the period-to-date sales volume.

Format	One letter from the list above.
Example	Type: V, then press <Enter>.

**20. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**21. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>.

### 22. Number of customers

This lets you restrict the report to the most active customers, or (if printing by sales representative or by territory) to either the most active or the least active sales representative (or territory). In this way you can look at your top 10, 20, or 100 customers.

Format	Press <F5>
--------	------------

### 23. Include page breaks ?

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

### 24. Include subtotals on detail pages ?

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

### 25. Print a cover page ?

#### Field number to change ?

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the Sales Analysis by Customer Sales Volume Report will print.

# Customer Type

This chapter contains the following topic:

[Selecting Customer Type](#) .....

## SELECTING CUSTOMER TYPE

This report shows the same information as the Sales Analysis by Customer, but customers are grouped and subtotaled by customer type. Customer type is a user-defined, 5-character code that can be assigned to each customer in A/R.

If you are not using A/R, or if you have chosen not to assign customer types in your A/R Customer selection, you may skip this chapter.

A summary is printed for this report, showing each customer type's total sales, total cost of sales, total gross profit, percent of total sales, and percent of total gross profit.

This report shows sales, cost of sales, and profit figures for the period-to-date, the year-to-date, and last year for each customer.

See a sample [Sales Analysis by Customer Type](#) report in the *Sample Reports* appendix.

### Select

*Customer type existing or Customer type new* from the *Customer reports* menu.

Two screens are needed to accommodate this selection.

### Customer Type First Screen

The following screen appears:

```
Customer type                                XYZ Company

1. Report/Summary/Labels/Export             █
2. Customer type
3. Sales rep
4. Sales territory
5. State
6. Include period-to-date ?
7. Include year-to-date ?
8. Include last year ?

R = Report    S = Summary    L = Labels    E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create. Refer to the Common Features chapter.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R

## 2. Customer type

Enter one to three customer types to be included in this report. Press <Enter> after each one; the first blank terminates entry of customer types.

### Options

In the first subfield (only), you may use one of the options:

<Enter>	For all customers that have not been assigned a customer type. The cursor will move to the next subfield to allow entry of another customer type.
<F5>	For All customers regardless of customer type. The cursor will move to Field # 3 at once.

There is no cross-referencing to A/R when customer types are entered here, but there should be at least one customer on file for the selected type[s].

Format	Five characters at each of three subfields.
Example	Press <F5> in the first subfield.

## 3. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

## 4. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

## 5.State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

- 6. Include period-to-date ?
- 7. Include year-to-date ? and
- 8. Include last year ?

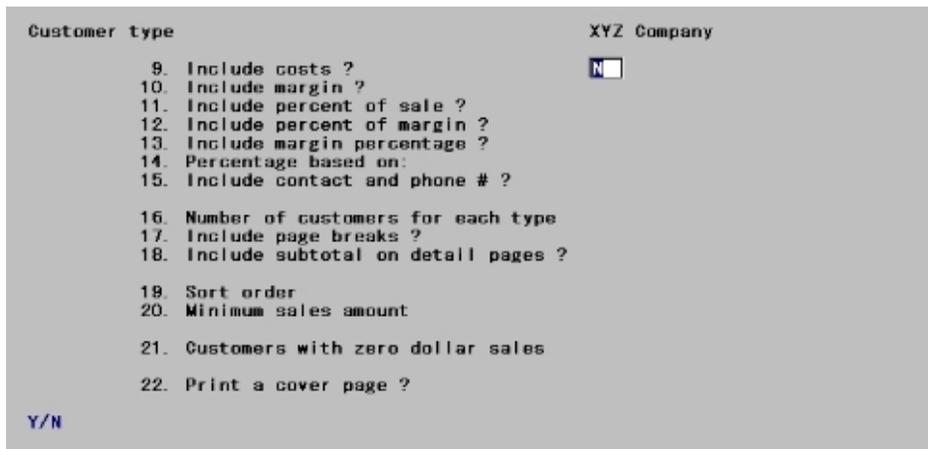
Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

### Customer Type Second Screen

The second screen appears as follows:



Enter the information as follows:

- 9. Include costs ? and
- 10. Include margin ?

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

- 11. Include percent of sale ? and
- 12. Include percent of margin ?

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**13. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**14. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**15. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**16. Number of customers for each type**

This lets you restrict the report to either more than # of customers or fewer than # of customer types. Select one from the following list:

M	For more than (enter # of customers)
F	For fewer than (enter # of customers)

Format	One letter either M or F. There is no default.
Example	Type: M, and then press <Enter>

The second line of this field requires the numbers of the customers.

Format	Five digits
Example	99999

**Options**

You may also use the option <F5> for all the customers.

**17. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y, and then press Enter>

**18. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y

**19. Sort order**

If you do not use sales representatives, this field is not applicable.

Otherwise, enter either:

C	To print the report in customer order within customer type.
S	To print the report in order by sales representative within customer type (and within that, by customer number).

Format	One letter, either C or S. The default is C.
Example	Press <Enter> for the default.

**20. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**21. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, and then press Enter>

**22. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the Sales Analysis by Customer Type Report will print.

# Customers for an Item

This chapter contains the following topic:

[Selecting Customers for an Item](#) .....

## SELECTING CUSTOMERS FOR AN ITEM

This report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percent for a selected range of items and the customers those items were sold to, within up to four selected reporting periods.

This selection requires both the A/R and I/C modules, and also requires that you keep invoice history in A/R. If not, you may skip this chapter.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by Customer within item or by descending order of sales volume within each item.

See a sample [Sales Analysis by Customers for an Item](#) report in the *Sample Reports* appendix.

### Select

*Customers for an Item existing* or *Customers for an Item new* from the *Customer reports* menu.

Two screens are needed to accommodate this selection.

### Selecting Customers for an Item First Screen

The following screen appears:

```

Customers for an Item                                XYZ Company

1. Report/Summary/Labels/Export 
2. Starting item number
3. Ending item number
4. Starting customer
5. Ending customer
6. Sales rep
7. Sales territory
8. State
9. Customer type
10. Reporting period 1          to
    period 2                  to
    period 3                  to
    period 4                  to
R = Report      S = Summary    L = Labels      E = Export
    
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create. Refer to the Common Features chapter.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R

**2. Starting item number and**

**3. Ending item number**

Enter the range of items to print on the report, or follow the screen instructions.

Format	Your standard item number format, as defined in I/C Control information.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

**4. Starting customer and**

**5. Ending customer**

Enter the range of customers to show for each selected item, or follow the screen instructions.

Format	12 characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

**6. Sales rep**

Enter the sales representative.

Format	Three characters
Example	Press <F5>

**7. Sales territory**

Enter the sales territory.

Format	Three characters
Example	Press <F5>

**8. State**

Format	Two characters
Example	Press <F5>

**9. Customer type**

Enter the customer type.

Format	Five characters
Example	Press <F5>

**10. Reporting period**

Enter from one to four reporting periods.

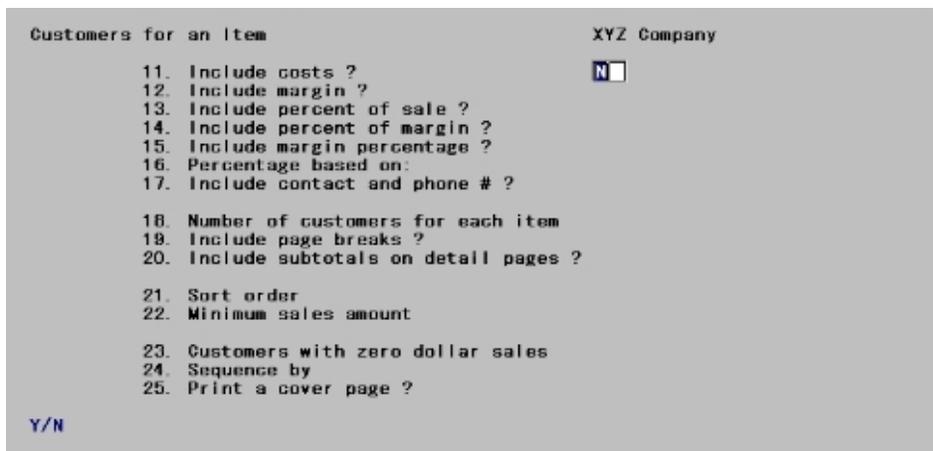
Format	Up to four reporting periods, each on a separate line and each represented as a range of dates in the format MMDDYY through MMDDYY.
Example	Enter 10119 through 33119 on the first line. Press <Enter> from the first field of the next line to terminate entry.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

**Customers for an Item Second screen**

The second screen appears as follows:



Enter the information as follows:

**11. Include costs ? and  
12. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**13. Include percent of sale ? and  
14. Include percent of margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**15. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**16. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**17. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**18. Number of customers for each item**

This lets you restrict the report to either more than # of customers or fewer than # of customers for an item.

**Options**

The options are:

M	For more than (enter # of cust)
F	For fewer than (enter # of cust)
Format	One letter either M or F. There is no default.
Example	Type:M and press <Enter>

The second line of this field requires the numbers of the customers.

Format	Five digits
Example	99999

**Options**

You may also use the option <F5> for all the customers.

**19. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type:Y

**20. Include subtotals on detail pages ?**

**F21. Sort order**

format	One letter, either Y or N. The default is N.
Example	Type: Y

Enter either:

C	To print the report in customer order within item.
V	To print the report in descending order of sales volume within each item.

Format	One letter from the list above.
Example	Type: C

**22. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**23. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I

**24. Sequence by ?**

If you have selected only a single reporting period on the preceding screen, this field displays and may not be entered. If you have chosen a sort order of C, this field displays as Not applicable.

Otherwise, a box opens showing the reporting periods as you have defined them. Enter a number to indicate the reporting period whose sale volume is to be used in determining the sequence of the report.

Format	One digit from 1 to 4, corresponding to one of your defined reporting periods. Your selection is displayed as a range of dates once entered.
Example	Does not appear in this example.

**25. Print a cover page ?**

**Field number to change ?**

Press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Make any needed changes. Upon pressing <Enter> with this field blank, the Sales Analysis - Customers for an Item Report will print.

# Customer SIC

This chapter contains the following topic:

[Selecting Customer SIC](#) .....

## SELECTING CUSTOMER SIC

This report shows the same information as the Sales Analysis by Customer, but customers are grouped and subtotaled by Standard Industry Code.

If you are not using A/R, or if you have not entered the optional SIC code field in A/R Customers, you may skip this chapter.

See a sample [Sales Analysis by SIC Code](#) report in the *Sample Reports* appendix.

### Select

*Customer SIC existing or Customer SIC new* from the *Customer reports* menu

Two screens are needed to accommodate this selection.

### Customer SIC First Screen

The following screen appears:

```
Customer SIC code                                XYZ Company

1. Report/Summary/Labels/Export  
2. SIC
3. Customer type
4. State
5. Sales rep
6. Sales territory
7. Include period-to-date ?
8. Include year-to-date ?
9. Include last year ?

R = Report    S = Summary    L = Labels    E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create. For details, refer to the [Common Features](#) chapter.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R

#### 2. SIC

Enter the SIC to select.

## Options

You may also use the options:

<F5>	For All SIC's
<Blank>	is allowed for customers with no SIC code assigned to them. Pressing <F5> for all will include customers with blank SIC codes.
Format	Six characters
Example	Press <F5>

### 3. Customer type

Enter the customer type. For details, refer to the *Common Features* chapter

Format	Five characters
Example	Press <F5>

### 4. State

Enter the postal abbreviation of the state you wish to include. For details, refer to the *Common Features* chapter.

Format	Two characters
Example	Press <F5>

### 5. Sales rep

Enter the sales representative. For details, refer to the *Common Features* chapter.

Format	Three characters
Example	Press <F5>

### 6. Sales territory

Enter the sales territory. For details, refer to the *Common Features* chapter.

Format	Three characters
Example	Press <F5>

- 7. Include period-to-date ?
- 8. Include year-to-date ? and
- 9. Include last year ?

For details, refer to the *Common Features* chapter.

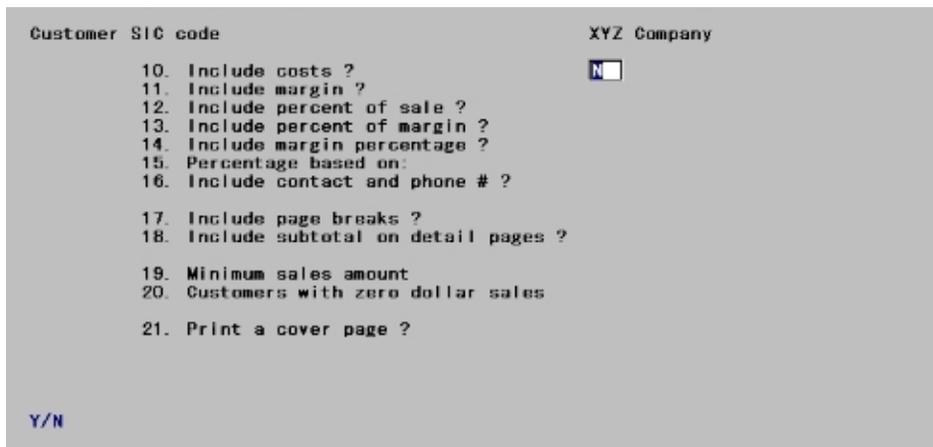
Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

## Selecting Customer SIC Second Screen

The second screen appears as follows:



Enter the information as follows:

- 10. Include costs ? and
- 11. Include margin ?

For details, refer to the [Common Features](#) chapter.

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

- 12. Include percent of sale ? and
- 13. Include percent of margin ?

For details, refer to the *Common Features* chapter.

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

#### 14. Include margin percentage ?

For details, refer to the *Common Features* chapter.

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

#### 15. Percentage based on:

For details, refer to the *Common Features* chapter.

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

#### 16. Include contact and phone # ?

For details, refer to the *Common Features* chapter.

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

#### 17. Include page breaks ?

For details, refer to the *Common Features* chapter.

Format	One letter, either Y or N. The default is N.
Example	Type: Y

#### 18. Include subtotals on detail pages ?

For details, refer to the *Common Features* chapter.

Format	One letter, either Y or N. The default is N.
Example	Type: Y

#### 19. Minimum sales amount

For details, refer to the *Common Features* chapter.

Format	999999999999-
Example	Press <F7>

## 20. Customers with zero dollar sales

For details, refer to the [Common Features](#) chapter.

Format	One letter, either I, E, or O. There is no default.
Example	Type: I

## 21. Print a cover page ?

For details, refer to the *Common Features* chapter.

### Field number to change ?

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the Sales Analysis by Customer SIC Report will print.

# Item

This chapter contains the following topic:

[Selecting Item](#) .....

## SELECTING ITEM

This report shows quantity sold, sales, cost of sales, and profit for the period-to-date and year-to-date for each selling item in inventory.

If you are not using the Inventory Control module, you may skip this chapter.

See a sample [Sales Analysis by Item](#) report in the *Sample Reports* appendix.

### Select

*Item existing* or *Item new* from the *Item reports* menu.

Two screens are needed to accommodate this selection.

### Item First Screen

The screen appears as follows:

```
Item                                     XYZ Company

1. Report/Summary/Labels/Export 
2. Starting item number
3. Ending item number
4. Sort order
5. Category
6. Sub-category
7. ABC code
8. Warehouse
9. Item cost

R = Report    S = Summary    L = Labels    E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create. For a full discussion of this feature, refer to the *Common Features* chapter.

Format:	One letter, either R, S, L, or E. There is no default.
Example:	Type: R

#### 2. Starting item numbers and 3. Ending item numbers

Enter the range of item numbers to show on the report. Follow the screen instructions.

Format:	Your standard item number format, as defined in <i>I/C Control information</i> .
Example:	Press <F2> at each field for <i>First</i> through <i>Last</i> .

#### 4. Sort order

Enter one of the following:

I	To print items in straight item-number order.
A	To print items by item number within inventory account number.
S	To print items by item number within sales account number.
E	To print items by item number within expense account number.
V	To print items by item number within prime vendor number.

Format:	One letter from the list above.
Example:	Type: I

#### If you have chosen item number sequence

No further selection is needed, and the cursor moves to the next numbered field.

#### If you have chosen inventory account sequence

The inventory account is an attribute of the item. Inventory account numbers are assigned in I/C Items and cannot be changed in A/R Invoices.

You can restrict the report to items for a single inventory account, or print all items in inventory account sequence. Enter the inventory account for which to show items,.

#### Options

You may also use one of the options:

<F1>	For the next entry in the I/C Inventory account selection
<SF1>	For the previous entry
<F2>	For the default inventory account from <i>I/C Control information</i>
<F5>	To print items for <i>All</i> inventory accounts

Format:	Your standard account number format, in segments, as defined in Company information
Example:	Does not occur in this example because you are printing in item number sequence.

### If you have chosen sales account sequence

The sales account is an attribute of the item. Sales account numbers are assigned in I/C Items and can be overridden in A/R Invoices for individual line items, if distributing sales for the *A/R Control Information*.

You can restrict the report to items for a single sales account, or print all items in sales account sequence. Enter the sale account for which to show items.

#### Options

You may also use the option:

<F5>	To print items for <i>All</i> sales accounts
Format:	Your standard account number format, in segments, as defined in Company information
Example:	Does not occur in this example because you are printing in item number sequence.

### If you have chosen expense account sequence

The expense account is an attribute of the item. Expense account numbers are assigned in I/C Items and cannot be changed in A/R Invoices.

You can restrict the report to items for a single expense account, or print all items in expense account sequence. Enter the expense account for which to show items.

#### Options

You may also use the option:

<F5>	To print items for <i>All</i> expense accounts
Format:	Your standard account number format, in segments, as defined in Company information.
Example:	Does not occur in this example because you are printing in item number sequence.

### If you have chosen vendor sequence

You can restrict the report to a single vendor by entering his vendor number here.

#### Options

You may also use the option:

<F5>	For <i>All</i> vendors
------	------------------------

Blank is also allowed in this field.

If you are not using Accounts Payable, I/C Inventory permits but does not require a vendor number for each item. Any items lacking a vendor number will be grouped together at the beginning of the report, if <F5> for *all* vendors is chosen.

Format:	5 characters
Example:	Does not occur in this example because you are printing in item number sequence.

### 5. Product category

Enter the product category. For details, refer to the Common Features chapter.

Format:	Five characters
Example:	Press <F5>

### 6. Product sub-category

Enter the product sub-category.

Format:	Five characters
Example:	Press <F5>

### 7. ABC code

Enter the ABC code to be shown. For details, refer to the *Common Features* chapter.

Format:	One letter, either A, B, or C. There is no default.
Example:	Press <F5>

### 8. Warehouse

Enter the warehouse. For details, refer to the *Common Features* chapter.

Format:	Two characters
Example:	Press <F5>

### 9. Item cost

Enter the type of cost to be shown (and used in calculating margin). For details, refer to the *Common Features* chapter.

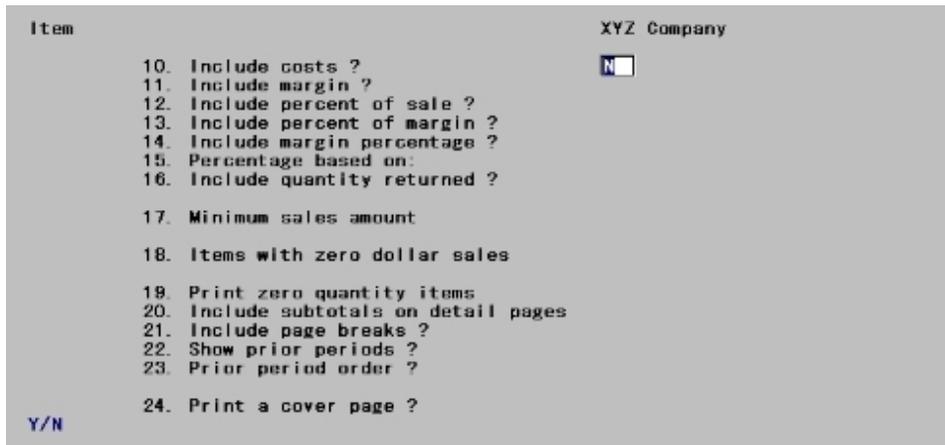
Format:	One letter, either R, A, S, or <F7> for <i>None</i> . There is no default.
Example:	Type: R

**Field number to change ?**

Make any needed changes.

**Item Second screen**

Upon pressing <Enter> with this field blank, the second screen will appear.



Enter the information as follows:

**10. Include costs ? and**

**11. Include margin ?**

For details, refer to the [Common Features](#) chapter.

Format:	One letter at each field, either Y or N. The default is N.
Example:	Press <Enter> at each field for the default.

**12. Include percent of sale ? and**

**13. Include percent of margin ?**

For details, refer to the *Common Features* chapter.

Format:	One letter, at each field, either Y or N. The default is N.
Example:	Press <Enter> at each field for the default.

**14. Include margin percentage ?**

For details, refer to the *Common Features* chapter.

Format:	One letter, either Y or N. The default is N.
Example:	Press <Enter> for the default.

**15. Percentage based on:**

For details, refer to the *Common Features* chapter.

Format:	One letter, either S or E. The default is S.
Example:	Press <Enter> to accept the default.

**16. Include quantity returned ?**

For details, refer to the *Common Features* chapter.

Format:	One letter, either Y or N. The default is N.
Example:	Type: Y

**17. Minimum sales amount**

For details, refer to the *Common Features* chapter.

Format:	999999999999-
Example:	Press <F7>

**18. Items with zero dollar sales**

For details, refer to the *Common Features* chapter

Format:	One letter, either I, E, or O. There is no default.
Example:	Type: I

**19. Print zero quantity items ?**

This field allows you to exclude items from the report, which you do not currently have in stock (whether or not they have experienced any sales during the period of interest).

If you are printing the report for a single warehouse, the decision is based on the quantity available at that facility. Otherwise, the decision is warehouse based on the quantity available at all locations of all warehouses.

Format:	One letter, either Y or N. The default is N.
Example:	Press <Enter> for the default.

**20. Include subtotals on detail pages ?**

For details, refer to the *Common Features* chapter.

Format:	One letter, either Y or N. The default is N.
Example:	Type: Y

**21. Include page breaks ?**

For details, refer to the *Common Features* chapter.

Format:	One letter, either Y or N. The default is N.
Example:	Type: Y

**22. Show prior periods ?**

This field displays as Not applicable if you are printing labels.

Answer Y to show prior periods (as defined in *I/C Control information*), or N to show the current period only.

Format:	One letter, either Y or N. The default is N.
Example:	Type: Y

**23. Prior period order ?**

This field displays as (*Not applicable*) if you have answered N to the preceding, or if you are printing labels.

Enter R to print prior periods from most recent to earliest, or E to print from earliest to most recent.

If you answer Yes to *show prior periods*, you are asked *Rounded? Y or N*.

Format:	One letter, either E or R. There is no default.
Example:	Type: R

**24. Print a cover page ?**

For details, refer to the *Common Features* chapter

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the Sales Analysis by Item Report will print. Y



# Item by Sales Volume

This chapter contains the following topic:

[Selecting Item by Sales Volume](#) .....

## SELECTING ITEM BY SALES VOLUME

This report lists sales, costs of sales, gross profit, and margin percent figures, as well as each item's percent of total sales and percent of total gross profit.

If you are not using the Inventory Control module, skip this chapter.

Items can be printed in order by either sales volume by item number or sales volume within warehouse by item numbers. You can also specify a minimum dollar volume or specify to print only the top n items.

The report is based on information from I/C Item Status.

See a sample [Sales Analysis by Item Sales Volume](#) report in the *Sample Reports* appendix.

### Select

*Item by sales volume existing or Item by sales volume new* from the *Item reports* menu.

### Item by Sales Volume First Screen

Two screens are needed to accommodate this selection. The first screen appears as follows:

```
Item sales volume                                XYZ Company

1. Report/Summary/Labels/Export 
2. Starting item number
3. Ending item number
4. Include vendor information ?
5. Vendor
6. Category
7. Sub-category
8. Inventory account number
9. Item cost

R = Report    S = Summary    L = Labels    E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

## 2. Starting item # and

### 3. Ending item #

Enter the range of item numbers to show on the report. Follow the screen instructions.

Format	Your standard item number format, as defined in I/C Control information.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 4. Include vendor information ?

Type Y to include vendor-related information (vendor number and vendor product description)

Answering Y here is meaningful even when you are printing labels—no vendor information is in fact included on the label, but you can restrict the labels to a single vendor's items.

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

### 5. Vendor

This field appears as Not applicable if you have answered N to the preceding.

You can restrict the report to a single vendor's items by entering his vendor number here. If you are interfaced to A/P, the vendor number is not required to be on file, and even if it is the vendor name will not display.

If you are not interfaced to A/P, vendor is an optional field within I/C Inventory: not every item may have a vendor assigned to it.

Items are shown with the vendor information currently in effect for the vendor currently associated with that item.

## Options

You can also use the option:

<F5>	For <i>All</i> vendors
------	------------------------

If you choose *All* vendors, any item not assigned to a vendor is printed on the report.

Format	Six characters
Example	Press <F5>

### 6. Category

Enter the category.

Format	Five characters
Example	Press <F5>

### 7. Sub-category

Enter the sub-category.

Format	Five characters
Example	Press <F5>

### 8. Inventory account number

Enter the inventory account number.

Format	Your standard account number format, in segments, as defined in Company information.
Example	Press <F5>

### 9. Item cost

Enter the type of cost to be shown (and used in calculating margin).

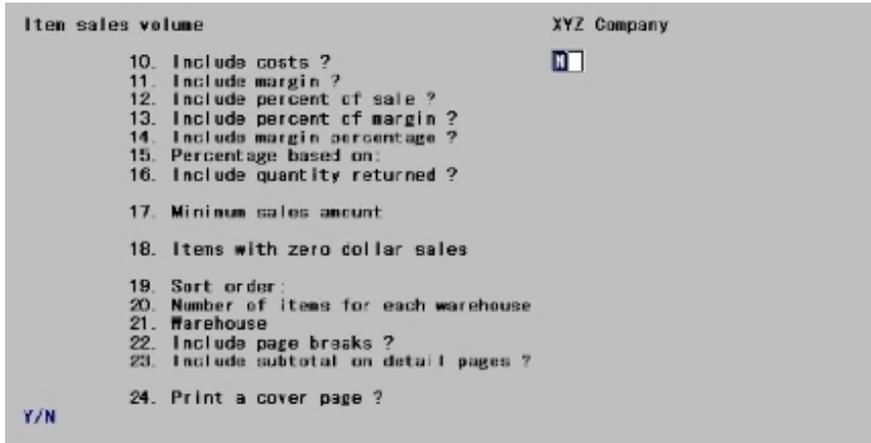
Format	One letter, either R, A, S, or <F7> for None. There is no default.
Example	Type: R

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

## Item by Sales Volume Second Screen

The second screen appears as follows:



Enter the information as follows:

**10. Include costs ? and  
11. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**12. Include percent of sale ?  
13. Include percent of margin ?**

Format	One letter, at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**14. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**15. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**16. Include quantity returned ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

**17. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**18. Items with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

**19. Sort order**

Enter either:

V	To print the report by Volume item numbers
W	To print the report by Warehouse item numbers

If you choose (at the Warehouse field below) to print <All> warehouses in Volume sequence, sales at each warehouse are reported individually. Thus an item whose sales are split fairly evenly among numerous warehouses will appear lower on the list than another item whose sales are less but are concentrated at a single warehouse.

Format	One letter from the list above.
Example	Type: V, then press <Enter>

**20. Number of items for each warehouse**

Example	Press <F5>
---------	------------

**21. Warehouse**

Format	Two characters
Example	Press <F5>

**22. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then Press <Enter>

**23. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

**24. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the *Sales Analysis by Item Sale Volume Report* will print.

# Item by Category

This chapter contains the following topic:

[Selecting Item by Category](#) .....

## SELECTING ITEM BY CATEGORY

Product category and sub-category are optional user-defined five-character codes that can be assigned in I/C Items to each item.

If you are not using the Inventory Control module, or if you use it but have chosen not to classify your inventory items by product category, skip this chapter.

A summary showing category or sub-category totals is printed at the end of the report.

See a sample [Sales Analysis by Item Category](#) report in the *Sample Reports* appendix.

### Select

*Items by category existing* or *Items by category new* from the *Item reports* menu.

Two screens are needed to accommodate this selection.

### Item by Category First Screen

The screen appears as follows:

```
Item category                                XYZ Company

1. Report/Summary/Labels/Export             
2. Starting category
3. Ending category
4. Starting sub-category
5. Ending sub-category
6. Inventory account number
7. Item cost

R = Report      S = Summary      L = Labels      E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type R, then press <Enter>

## 2. Starting category and

### 3. Ending category

Enter the range of product categories for which you wish to show items. Blank is a valid entry, and is used to select items, which have not been assigned to any category.

Format	Five characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## 4. Starting sub-category and

### 5. Ending sub-category

Enter the product sub-category for which you wish to show items.

Blank is a valid entry, and is used to select items which have not been assigned to any sub-category. However, if you have selected categories Blank through Blank in Fields # 2 and # 3, the sub-category fields display as (*Not applicable*) and may not be entered (because an item cannot belong to a sub-category of a nonexistent category).

Format	Five characters at each field.
Example	Press <F2> at each field for First through Last

## 6. Inventory account number

Enter the inventory account number.

Format	Your standard account number format, in segments, as defined in Company information.
Example	Press <F5>

## 7. Item cost

Enter the type of cost to be shown (and used in calculating margin).

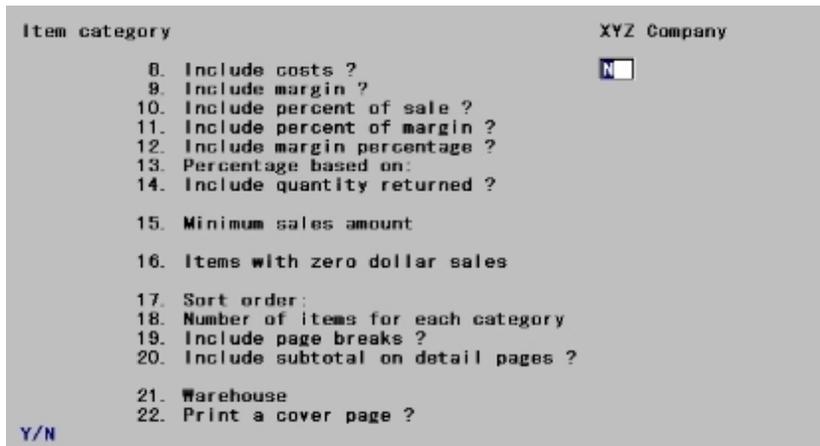
Format	One letter, either R, A, S, or <F7> for <i>None</i> . There is no default.
Example	Type R

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen appears:

### Item by Category Second Screen

The second screen appears as follows:



Enter the following information:

**8. Include costs ? and**

**9. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**10. Include percent of sale ? and**

**11. Include percent of margin ?**

Format	One letter, at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**12. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**13. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**14. Include quantity returned ?**

Format	One letter, either Y or N. The default is N.
Example	Type Y, then press <Enter>

### 15. Minimum sales amount

Format	999999999999-
Example	Press <F7>

### 16. Items with zero dollar sales

Format	One letter, either I, E, or O. There is no default.
Example	Type I

### 17. Sort order

If you have selected a single category and sub-category in Fields #1 and 2 (including Blank), this field displays as Not applicable and may not be entered.

Enter either:

C	To print the items in sequence by category (and within that, by sub-category and item number). This choice is meaningful only if you have selected a range of more than one categories.
S	To print the items in sequence by sub-category (and within that, by item number). This choice is meaningful only if you have selected a single category.
A	To print the report in sequence by inventory account number within category (and within that again by item number). Sub-category number is ignored.
Format	One letter from the list above. There is no default.
Example	Type C, then press <Enter>

### 18. Number of items for each category

This lets you restrict the report to either more than # of items or fewer than # of items.

#### Options

The options are:

M	For more than (enter # of items)
F	For fewer than (enter # of items)
Format	One letter either M or F. There is no default.

The second line of this field requires the numbers of the items.

Format	Five digits
--------	-------------

## Options

You may also use the option <F5> for all the items.

### 19. Include page breaks ?

Format	One letter, either Y or N. The default is N.
Example	Type <Y> then press <Enter>

### 20. Include subtotals on detail pages ?

Format	One letter, either Y or N. The default is N.
Example	Type <Y> then press <Enter>

### 21. Warehouse

Format	Two characters
Example	Press <F5>

### 22. Print a cover page ?

#### Field number to change ?

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the Sales Analysis by Item Category Report will print.

# Items for a Customer

This chapter contains the following topics:

[Selecting Items for a Customer](#) .....

## SELECTING ITEMS FOR A CUSTOMER

This report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percent for a selected range of customers and the items sold to these customers, within up to four selected reporting periods.

This selection requires both the A/R and I/C modules, and also requires that you keep invoice history in A/R. If not, skip this chapter.

Percentages are based on sales and profits within selected reporting ranges.

You can print this report in order by sales volume or by item number within customer number.

See a sample [Sales Analysis by Items for a Customer](#) report in the *Sample Reports* appendix.

### Select

*Items for a customer existing or Items for a customer new* from the *Item reports* menu.

Two screens are needed to accommodate this selection.

### Items for a Customer First Screen

The following screen appears:

```

Items for a Customer                                XYZ Company

1. Report/Summary/Export      
2. Starting customer
3. Ending customer
4. Starting item
5. Ending item
6. Item category
7. Sub-category
8. Inventory account
9. Reporting period 1      to
   period 2              to
   period 3              to
   period 4              to
R = Report      S = Summary      E = Export
    
```

Enter the following information:

#### 1. Report/Summary/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, or E. There is no default.
Example	Type: R, then press <Enter>

Note the absence of the usual *Label* option. To print labels, use one of the Items selections.

**2. Starting customer and**

**3. Ending customer**

Enter the range of customers to print on the report, or follow the screen instructions.

Format	12 characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

**4. Starting item and**

**5. Ending item**

Enter the range of items to print on the report, or follow the screen instructions.

Format	Your standard item number format, as defined in I/C Control information.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

Enter the range of item numbers to show for each selected customer; or follow the screen instructions.

**6. Item category**

Enter the item category.

Format	Five characters
Example	Press <F5>

**7. Sub-category**

Enter the item sub-category.

Format	Five characters
Example	Press <F5>

**8. Inventory account number**

Enter the inventory account number.

Format	Your standard account number format, in segments, as defined in Company information.
Example	Press <F5>

**9. Reporting period**

Enter from one to four reporting periods.

Format	Up to four reporting periods, each on a separate line and each represented as a range of dates in the format MMDDYY through MMDDYY.
Example	Enter 10119 through 33119 on the first line. Press <Enter> from the first field of the next line # to terminate entry.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

### Items for a Customer Second Screen

Enter the information as follows:

**10. Include costs ? and**

**11. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**12. Include percent of sale ?**

**13. Include percent of margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**14. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**15. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**16. Number of items for each customer**

This lets you restrict the report to either more than # of items or fewer than # of items for each customer.

### Options

The options are:

M	For more than (enter # of items)
F	For fewer than (enter # of items)

Format	One letter, either M or F. There is no default.
--------	---

The second line of this field requires the numbers of the customers.

Format	Five digits
--------	-------------

### Options

You may also use the option <F5> for *All* the items.

#### 17. Include page breaks ?

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

#### 18. Include subtotals on detail pages ?

Format	One letter, either Y or N. The default is N
Example	Type: Y, then press <Enter>

#### 19. Sort order

Enter either:

C	To print the report in order by item number within customer number.
V	To print the items in descending order of sales volume within each customer.

Format	One letter from the list above.
Example	Type: C, then press <Enter>

#### 20. Minimum sales amount

Format	999,999,999,999-
Example	Press <F7>

#### 21. Items with zero dollar sales

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

**22. Print zero quantity items ?**

This field allows you to exclude items from the report, which you do not currently have in stock (whether or not they have experienced any sales during the period of interest).

If you are printing the report for a single warehouse, the decision is based on the quantity available at that warehouse. Otherwise, the decision is based on the quantity available at all warehouses.

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**23. Sequence by ?**

If you have selected only a single reporting period on the preceding screen, this field is automatically set to that period and can not be changed. If you have chosen a sort order C, this field displays as *(Not applicable)*.

Otherwise, a box opens showing the reporting periods as you have defined them. Enter a number to indicate the reporting period whose sale volume is to be used in determining the sequence of the report.

Format	One digit from 1 to 4, corresponding to one of your defined reporting periods. Your choice displays as a range of dates upon selection.
Example	Does not appear in this example.

**24. Print a cover page ?**

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the *Items for a Customer Report* will print.

# Customers for a Service

This chapter contains the following topics:

[Selecting Customers for a Service](#) .....

## SELECTING CUSTOMERS FOR A SERVICE

This report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percent for a selected range of services and the customers those services were sold to, within up to four selected reporting periods.

If you do not use A/R, or if you use A/R but have chosen in A/R Control information not to keep invoice history, you may skip this chapter.

This selection is intended for users who routinely bill their customers for services rather than merchandise; if this does not describe you, skip this chapter.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume, or in customer service number.

The amounts shown for services are obtained from A/R Invoice History.

### Select

*Customer for a service existing or Customer for a service new* from the *Service reports* menu.

Two screens are required to accommodate this selection.

### Customers for a Service First Screen

The screen appears as follows:

```
Customers for a Service                                XYZ Company

1. Report/Summary/Labels/Export                       
2. Starting service
3. Ending service
4. Starting customer
5. Ending customer
6. Sales rep
7. Sales territory
8. State
9. Customer type
10. Reporting period 1 to
    period 2 to
    period 3 to
    period 4 to
R = Report      S = Summary      L = Labels      E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

## 2. Starting service and

### 3. Ending service

Enter the range of services to print on the report. Follow the screen instructions.

Format	Three characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## 4. Starting customer and

### 5. Ending customer

Enter the range of customers to print for each service. Follow the screen instructions.

Format	12 characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## 6. Sales rep

Enter the sales representative.

Format	Three characters.
Example	Press <F5>

## 7. Sales territory

Enter the sales territory.

Format	Three characters.
Example	Press <F5>

## 8. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

## 9. Customer type

Enter the customer type.

Format	Five characters.
Example	Press <F5>

### 10. Reporting periods

Enter from one to four reporting periods.

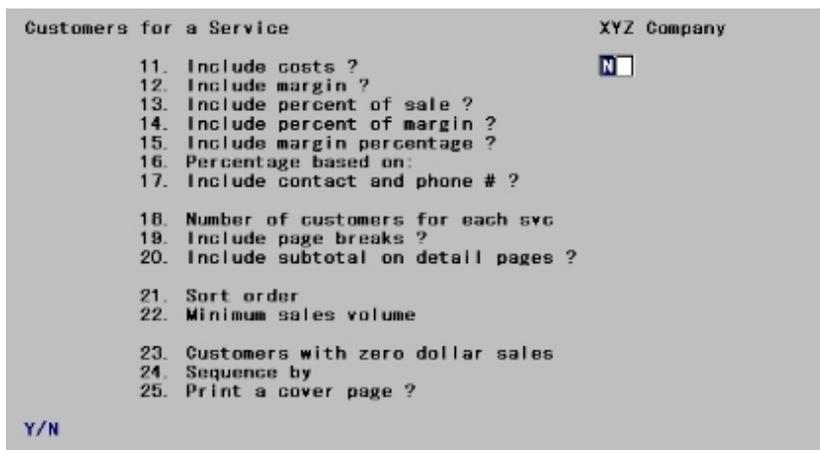
#### Field number to change ?

Format	Up to four reporting periods, each on a separate line and each represented as a range of dates in the format MMDDYY through MMDDYY.
Example	Enter 10119 through 33119 on the first line. Press <Enter> from the first field of the next line to terminate entry.

Make any needed changes.

## Customers for a Service Second Screen

Upon pressing <Enter> with this field blank, the second screen appears:



Enter the following information:

#### 11. Include costs ? and

#### 12. Include margin ?

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

#### 13. Include percent of sale ? and

#### 14. Include percent of margin ?

Format	One letter, at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**15. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**16. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**17. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**18. Number of custs for each service**

This lets you restrict the report to either more than # of customers or fewer than # of customers for each service.

**Options**

The options are:

M	For more than (enter # of cust)
F	For fewer than (enter # of cust)
Format	One letter either M or F. There is no default.

The second line of this field requires the number of customers.

Format	Five digits
--------	-------------

**Options**

You may also use the option <F5> for all the customers.

**19. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

### 20. Include subtotal on detail pages ?

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

### 21. Sort order

You can show the customers in either customer sequence or in sequence of their sales volume for each service. Enter either:

C	To print in customer number sequence.
V	To print customers in customer sales volume sequence.

Format	One letter from the list above. There is no default.
Example	Type: C, then press <Enter>

### 22. Minimum sales amount

Format	999999999999-
Example	Press <F7>

### 23. Customers with zero dollar sales

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

### 24. Sequence by ?

If you have selected only a single reporting period on the preceding screen, this field displays that period and can not be changed. If you chose a sort order of C, this field displays as *(Not applicable)*.

Otherwise, a box opens showing the reporting periods as you have defined them. Enter a number to indicate the reporting period whose sale volume is to be used in determining the sequence of the report.

Format	One digit from 1 to 4, corresponding to one of your defined reporting periods. Your selection is displayed as a range of dates.
Example	Does not appear in this example.

**25. Print a cover page ?**

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the Sales Analysis - Customers for a Service Report will print.

# Services for a Customer

This chapter contains the following topic:

[Selecting Services for a Customer](#) .....

## SELECTING SERVICES FOR A CUSTOMER

This report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percent for a selected range of services within up to four selected reporting periods, showing the services purchased by each customer.

If you do not use A/R, or if you use A/R but have chosen in A/R Control information not to keep invoice history, you may skip this chapter.

This selection is meant for users who routinely bill their customers for services rather than merchandise; if this does not describe you, skip this chapter.

Percentages are based on sales and profits within selected reporting ranges.

You can print this report in order by customer number or sales volume. The amounts shown for services are obtained from A/R Invoice History.

### Select

*Services for a customer existing or Services for a customer new from the Service reports menu.*

Two screens are needed to accommodate this selection.

## Services for a Customer First Screen

The first screen appears as follows:

```
Services for a customer                                XYZ Company

1. Report/Summary/Export                               
2. Starting customer
3. Ending customer
4. Starting service
5. Ending service
6. Reporting period 1                                 to
   period 2                                           to
   period 3                                           to
   period 4                                           to

R = Report      S = Summary      E = Export
```

Enter the following information:

### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

## 2. Starting customer and

### 3. Ending customer

Enter the range of customers to print on the report. Follow the screen instructions.

Format	12 characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## 4. Starting service and

### 5. Ending service

Enter the range of services to show for each selected customer. Follow the screen instructions.

Format	Three characters at each field.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## 6. Reporting periods

Enter from one to four reporting periods.

Format	Up to four reporting periods, each on a separate line and each represented as a range of dates in the format MMDDYY through MMDDYY.
Example	Enter 10119 through 33119 on the first line. Press <Enter> from the first field of the next line to terminate entry.

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen appears.

## Services for a Customer Second Screen

The following is the second screen for Services for a Customer:

```
Services for a customer                                XYZ Company
7. Include costs ?                                   N
8. Include margin ?
9. Include percent of sales
10. Include percent of margin ?
11. Include margin percentage ?
12. Percentage based on:
13. Number of services for each cust
14. Include page breaks ?
15. Include subtotals on detail pages ?
16. Sort order
17. Minimum sales amount
18. Services with zero dollar sales
19. Sequence by
20. Print a cover page ?
Y/N
```

Enter the following information:

**7. Include costs ? and**

**8. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**9. Include percent of sale ? and**

**10. Include percent of margin ?**

Format	One letter, at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**11. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**12. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**13. Number of services for each cust**

This lets you restrict the report to either more than # of services or fewer than # of services for each customer.

**Options**

The options are:

M	For more than (enter # of serv)
F	For fewer than (enter # of serv)
Format	One letter, either M or F. There is no default.

The second line of this field requires the numbers of the services.

Format	Five digits
--------	-------------

You may also use the option <F5> for *All* services.

Example	Press <F5>
---------	------------

**14. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

**15. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

**16.Sort order**

You can show the services in either service number sequence or in sequence of their sales volume for each customer. Enter either:

C	To print in customer number sequence.
V	To print customer in volume sequence.

Format	One letter from the list above. There is no default.
Example	Type: C , then press <Enter>

**17. Minimum sales amount**

Format	999999999999-
Example	Press <F5>

**18. Services with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

**19. Sequence by ?**

If you have selected only a single reporting period on the preceding screen, that field displays \*\*\*\* and can not be changed. If you have chosen a sort order of C, this field displays as Not applicable.

Otherwise, a box opens showing the reporting periods as you have defined them. Enter a number to indicate the reporting period whose sale volume is to be used in determining the sequence of the report.

Format	One digit from 1 to 4, corresponding to one of your defined reporting periods. Your selection displays as a range of dates.
Example	Does not appear in this example.

**20. Print a cover page ?**

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the *Services for a Customer Report* will print.

# Sales Rep, Responsible

This chapter contains the following topic:

[Selecting Rep, Responsible](#) .....

## SELECTING REP, RESPONSIBLE

This report shows sales, cost of sales, and profit figures for the period-to-date, the year-to-date, and the last year for each customer, with customers categorized by the customer's assigned sales representative. A summary lists sales rep totals.

If you do not use A/R, or if you use it but have chosen (in A/R Control information) not to use sales representatives, skip this chapter.

Customers are listed by responsible sale rep. This is the sales rep assigned to the customer on the customer record. This is not necessarily the actual sales rep who made each sale to that customer. (For the actual sales for a sales rep, see the preceding chapter.)

The report derives its information from A/R Customers.

See a sample [Sales Analysis by Responsible Sales Rep](#) report in the *Sample Reports* appendix.

### Select

*Sales rep responsible existing* or *Sales rep responsible new* from the *Sales representative reports* menu.

Two screens are needed to accommodate this selection.

### Selecting Rep, Responsible First Screen

The screen appears as follows:

```
Sales rep, responsible                                XYZ Company

1. Report/Summary/Labels/Export      
2. Starting sales rep
3. Ending sales rep
4. Starting customer
5. Ending customer
6. Sales territory
7. State
8. Customer type
9. Include period-to-date ?
10. Include year-to-date ?
11. Include last year ?

R = Report      S = Summary      L = Labels      E = Export
```

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

### 2. Starting sales rep and

### 3. Ending sales rep

Enter the range of sales representative(s) you want to limit the report to. Follow the screen instructions.

Format	Three letters. Lowercase is converted to upper.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 4. Starting customer and

### 5. Ending customer

Enter the range of customers you wish included in the report. Follow the screen instructions.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 6. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

### 7. State

Enter the postal abbreviation of the state you wish to include.

Format	Two letters
Example	Press <F5>

### 8. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

**9. Include period-to-date ? and**

**10. Include year-to-date ?**

**11. Include last year ?**

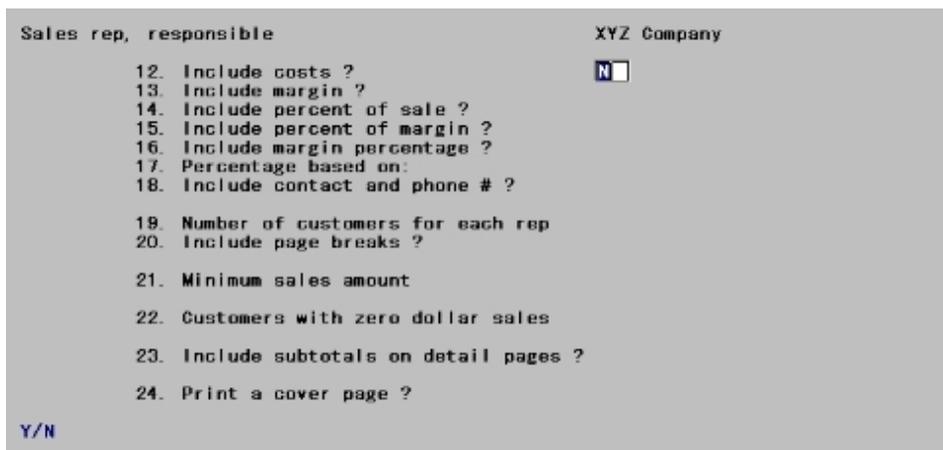
Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

### Sales Rep, Responsible Second Screen

The second screen appears as follows:



Enter the following information:

**12. Include costs ? and**

**13. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**14. Include percent of sale ? and**

**15. Include percent of margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

### 16. Include margin percentage ?

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

### 17. Percentage based on:

Format	One letter, either S or E. The default is E.
--------	--

### 18. Include contact and phone # ?

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

### 19. Number of customers for each rep

This lets you restrict the report to either more than # of customers or fewer than # of customers for each rep.

#### Options

The options are:

M	For more than (enter # of cust)
F	For fewer than (enter # of cust)
Format	One letter, either M or F. There is no default.

The second line of this field requires the numbers of the customers.

Format	Five digits
--------	-------------

You may also use the option <F5> for *All* the customers.

Example	Press <F5>
---------	------------

### 20. Include page breaks ?

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

### 21. Minimum sales amount

Format	999999999999-
Example	Press <F7>

### 22. Customers with zero dollar sales

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

### 23. Include subtotals on detail pages ?

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

### 24. Print a cover page ?

#### Field number to change ?

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the *Sales Analysis by Responsible Sales Rep Report* will print.

# Sales Rep, Actual

This chapter contains the following topic:

[Selecting Sales Rep, Actual](#) .....

## SELECTING SALES REP, ACTUAL

Two formats are available for this report: summary and detail:

- The summary report prints PTD and YTD summary information for each sales rep. The data for this report is obtained from A/R Sales Reps.
- The detail report, which you can also sort by decreasing sales volume, shows the sales, cost of sales, profits, and margins for a specified number of customers for each sales rep. The information is obtained from A/R Invoice History. It follows that if you have chosen (in A/R *Control information*) not to keep Invoice history, the Sales Rep Actual Reports are not available on your system.

If you do not use A/R, or if you use it but have chosen (in A/R Control information) not to use sales representatives, skip this chapter.

See a sample [Sales Analysis by Actual Sales Rep](#) report in the *Sample Reports* appendix.

### Select

*Sales rep Actual existing* or *Sales rep Actual new* from the *Sales representative reports* menu.

Two screens are needed to accommodate this selection.

### Sales Rep, Actual First Screen

The following screen appears:

```
Sales rep, actual                                XYZ Company

1. Report/Summary/Labels/Export                
2. Starting sales rep
3. Ending sales rep
4. Starting customer
5. Ending customer
6. Sales territory
7. State
8. Customer type
9. Reporting period 1 to
   period 2 to
   period 3 to
   period 4 to

R = Report      S = Summary      L = Labels      E = Export
```

If you choose the report format and it is available on your system, you see the following screen:

Enter the following information:

#### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

**2. Starting sales rep and**

**3. Ending sales rep**

Enter the range of sales representative[s] you want to limit the report to. Follow the screen instructions.

Format	Three letters. Lower-case is converted to upper.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i>

**4. Starting customer and**

**5. Ending customer**

Enter the range of customers you wish included in the report. Follow the screen instructions.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

**6. Sales territory**

Enter the sales territory.

Format	Three characters
Example	Press <F5>

**7. State**

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

**8. Customer type**

Enter the customer type.

Format	Five characters
Example	Press <F5>

**9. Reporting periods**

Enter from one to four reporting periods.



**15. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**16. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**17. Number of customers for each rep**

This lets you restrict the report to either more than # of customers or fewer than # of customers for each rep.

**Options**

The options are:

M	For more than (enter # of cust)
F	For fewer than (enter # of cust)
Format	One letter, either M or F. There is no default.

The second line of this field requires the numbers of the customers for each rep.

Format	Five digits
--------	-------------

You may also use the option <F5> for all the customers.

Example	Press <F5>
---------	------------

**18. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y

**19. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y

### 20. Sort order

You can show each representative's customers in either customer sequence or reverse sales volume sequence. Enter either:

C	To print customers in sequence by customer number for each sales representative.
V	To print customers in sequence by sales volume for each sales representative.
Format	One letter from the list above. There is no default.
Example	Type: C

### 21. Minimum sales amount

Format	999999999999-
Example	Press <F7>

### 22. Customers with zero dollar sales

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

### 23. Sequence by ?

If you have selected only a single reporting period on the preceding screen this field displays that reporting period and may not be entered.

Otherwise, a box opens showing the reporting periods as you have defined them. Enter a number to indicate the reporting period whose sale volume is to be used in determining the sequence of the report.

Format	One digit from 1 to 4, corresponding to one of your defined reporting periods. Once you have made your selection, it is displayed as a range of dates.
Example	Does not appear in this example.

### 24. Print a cover page ?

#### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the *Sales Analysis by Actual Sales Rep Report* will print.



# Sales Territory

This chapter contains the following topic:

[Selecting Sales Territory](#) .....

## SELECTING SALES TERRITORY

This report shows the period-to-date, year-to-date, and last year sales, cost of sales, and gross profit, and margin percent for each customer. These figures are grouped and subtotaled by sales territory.

If you are not using A/R, or if you have chosen not to assign sales territories, skip this chapter.

Sales territory is an optional field within A/R Customers. Even if you enter this field, your entries are not edited against any list of valid territory codes. Nor is the territory code checked for consistency with the sale representative[s] assigned to that territory. To derive any benefit from this report, you must be careful to enforce valid entries in the Customers.

See a sample [Sales Analysis by Sales Territory](#) report in the *Sample Reports* appendix.

### Select

*Sales territory existing or Sales territory new* from the *Location reports* menu.

Two screens are needed to accommodate this selection.

## Sales Territory First Screen

The screen appears as follows:

```
Sales territory                                XYZ Company

1. Report/Summary/Labels/Export  [ ]
2. Sales territory
3. Sales rep
4. State
5. Customer type
6. Include period-to-date ?
7. Include year-to-date ?
8. Include last year ?

R = Report    S = Summary    L = Labels    E = Export
```

Enter the following information:

### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

## 2. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

## 3. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

## 4. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

## 5. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

## 6. Include period-to-date ?

## 7. Include year-to-date ? and

## 8. Include last year ?

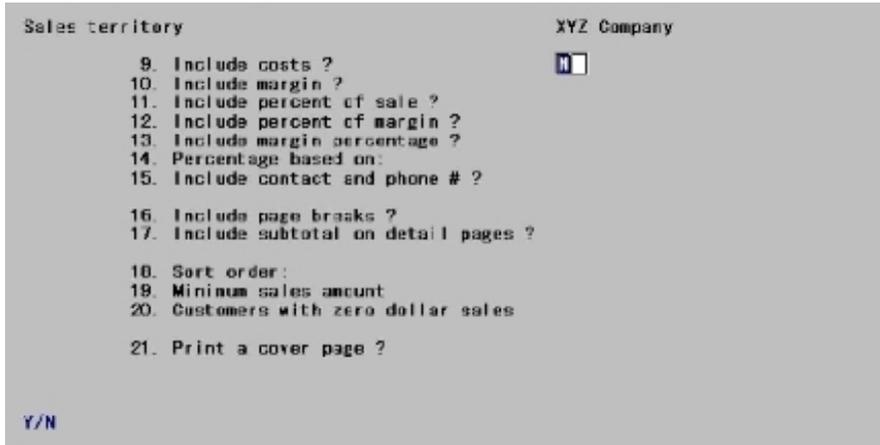
Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

## Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

## Second screen

The second screen appears as follows:



Enter the following information:

**9. Include costs ? and**

**10. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**11. Include percent of sale ? and**

**12. Include percent of margin ?**

Format	One letter, at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**13. Include margin percentage ?**

Format	One letter, either Y or N. The default is N
Example	Press <Enter> for the default.

**14. Percentage based on:**

Format	One letter, either S or E. The default is E.
Example	Press <Enter> to accept the default.

**15. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**16. Include page breaks ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

**17. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y

**18. Sort order**

Enter either:

C	To print the report in order by customer within sales territory.
R	To print the report in order by customer number within sales representative within sales territory.
S	To print the report in order by customer number within state within sales territory.

Format	One letter from the list above; the default is C.
Example	Press <Enter> to accept the default.

**19. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**20. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I

**21. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the *Sales Analysis by Sales Territory Report* will print.



# State

This chapter contains the following topic:

[Selecting State](#) .....

## SELECTING STATE

This report shows sales, cost of sales, and profit figures for the period-to-date, the year-to-date, and the last year for each customer, with the customers in order by state.

If you are not using A/R, skip this chapter.

A summary of individual state totals is printed at the end of the report.

The information is obtained from *A/R Customers*.

### Select

*State existing* or *State new* from the *Location reports* menu.

Two screens are needed to accommodate this selection.

## State First Screen

The screen appears as follows:

The screenshot shows a terminal-style interface for 'XYZ Company'. The title is 'State'. The menu items are:

- 1. Report/Summary/Labels/Export
- 2. State
- 3. Sales rep
- 4. Customer type
- 5. Sales territory
- 6. SIC
- 7. Sort order
- 8. Include subtotals on detail pages ?
- 9. Include page breaks ?

At the bottom, there is a legend: R = Report, S = Summary, L = Labels, E = Export.

Enter the following information:

### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R, then press <Enter>

## 2. State

Enter the postal abbreviation of the state or states you wish to include. This selection, unlike most others, lets you select multiple states (up to ten of them, the first blank subfield terminates state entry).

Format	Twenty three characters in each of ten subfields.
Example	Press <F5>

## 3. Sales rep

Enter the sales representative.

Format	Six characters
Example	Press <F5>

## 4. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

## 5. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

## 6. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>

## 7. Sort order:

Select either:

C	To print the report in order by customer number within state.
Z	To print the report in order by customer number within zip code within state.

Format	One letter from the list above.
Example	Type: C

**8. Include subtotals on detail pages ?**

Format	One letter, either Y or N. There is no default.
Example	Type: Y, then press <Enter>

**9. Include page breaks ?**

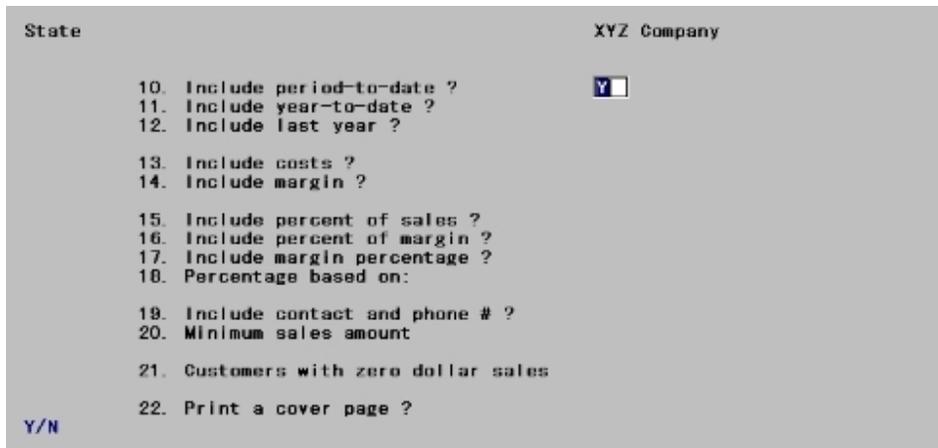
Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

**State Second Screen**

The second screen appears as follows:



Enter the following information:

**10. Include period-to-date ?**

**11. Include year-to-date ? and**

**12. Include last year ?**

Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

**13. Include costs ? and**

**14. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**15. Include percent of sales ? and**

**16. Include percent of margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**17. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**18. Percentage based on:**

Format	One letter, either S or E. The default is S
Example	Press <Enter> to accept the default.

**19. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**20. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**21. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

**22. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the *Sales Analysis by State Report* will print.

# ZIP Code

This chapter contains the following topic:

[Selecting ZIP Code](#) .....

## SELECTING ZIP CODE

This report shows sales, cost of sales, and profit figures for the period-to-date, the year-to-date, and last year for each customer, with the customers in order by ZIP code.

If you are not using A/R, skip this chapter.

A summary of individual ZIP code totals is printed at the end of the report.

The information is obtained from A/R Customers.

See a sample [Sales Analysis by ZIP Code](#) report in the *Sample Reports* appendix.

### Note

All ten characters of the ZIP code field are used, and they are treated as alphanumeric characters. You can thus enter various non-numeric postal codes for your customers in countries outside the United States, in addition to using the standard numeric ZIP codes for U.S. customers.

### Select

*ZIP code existing or ZIP code new* from the *Location reports* menu.

Two screens are needed to accommodate this selection.

## Zip Code First Screen

The screen appears as follows:

```
Zip code                                XYZ Company

1. Report/Summary/Labels/Export          
2. Starting zip code
3. Ending zip code
4. State
5. Sales rep
6. Customer type
7. Sales territory
8. SIC
9. Subtotal on 3 or 5 digits ?
10. Include subtotals on detail pages ?
11. Include page breaks ?

R = Report   S = Summary   L = Labels   E = Export
```

Enter the following information:

### 1. Report/Summary/Labels/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, L, or E. There is no default.
Example	Type: R

## 2. Starting ZIP code and

### 3. Ending ZIP code

Enter the range of ZIP codes to select. Follow the screen directions.

Use caution when specifying ZIP code ranges that do not use all available 10 digits of the ZIP code field. Depending on what you type in, certain ZIP codes that you thought would be included on the report would not be. For instance, a range of 123 through 137 would fail to pick up ZIP code 13743, so enter this as 12300 through 13799.

Non-numeric ZIP codes may be included within the range (to capture foreign customers).

Customers with blank ZIP codes will be included in the report only if you select First through Last.

Format	15 characters
Example	Press <F2> at each field for First through Last.

## 4. State

Enter the postal abbreviation of the state you wish to include.

Format	Twenty three characters
Example	Press <F5>

## 5. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

## 6. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

## 7. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

### 8. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>

The Standard Industrial Classification (abbreviated SIC) is a United States government system for classifying industries by a four-digit code.

### 9. Subtotal on 3 or 5 digits ?

Choose whether you want a subtotal after each five-digit ZIP code or whether you only want to break on the first three digits of the ZIP code.

Format	One digit, either 3 or 5
Example	Type: 3

### 10. Include subtotals on detail pages ?

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

### 11. Include page breaks ?

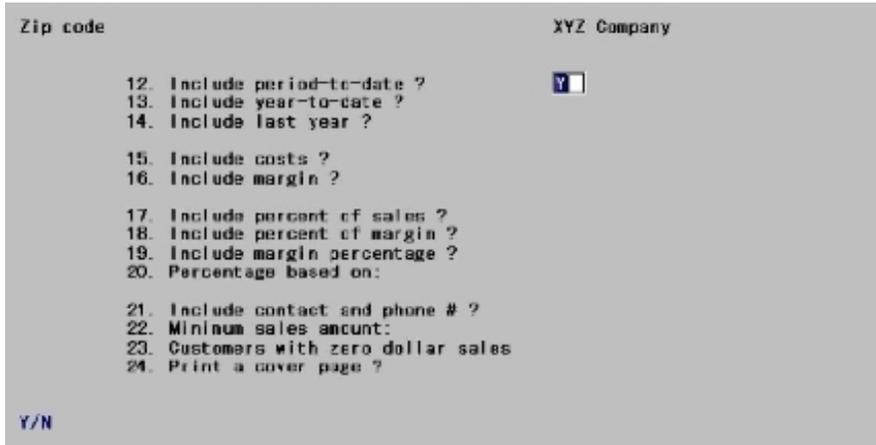
Format	One letter, either Y or N. The default is N.
Example	Type: Y, then press <Enter>

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

## Zip Code Second Screen

The second screen appears as follows:



Enter the following information:

**12. Include period-to-date ?**

**13. Include year-to-date ? and**

**14. Include last year ?**

Format	One letter at each field, either Y or N. The default is Y for each.
Example	Press <Enter> at each field for the default.

**15. Include costs ? and**

**16. Include margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**17. Include percent of sales ? and**

**18. Include percent of margin ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**19. Include margin percentage ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter> for the default.

**20. Percentage based on:**

Format	One letter, either S or E. The default is S.
Example	Press <Enter> to accept the default.

**21. Include contact and phone # ?**

Format	One letter, either Y or N. The default is N.
Example	Press <Enter>

**22. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**23. Customers with zero dollar sales**

Format	One letter, either I, E, or O. There is no default.
Example	Type: I, then press <Enter>

**24. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will not be lost).

Upon pressing <Enter> with this field blank, the *Sales Analysis by ZIP Code Report* will print.

# Customer Comparatives

This chapter contains the following topics:

<a href="#">Introduction to Customer Comparatives</a>	.....
<a href="#">Load Customer Comparatives</a>	.....
<a href="#">Transfer Customer Comparative Data</a>	.....
<a href="#">Enter Customer Comparatives</a>	.....
<a href="#">Customer Comparatives - Monthly</a>	.....
<a href="#">Customer Comparatives - Quarterly</a>	.....
<a href="#">Customer comparatives - Yearly</a>	.....

## INTRODUCTION TO CUSTOMER COMPARATIVES

The Customer Comparative Reports allow you to compare results by customer from one period to another, or to a corresponding period in some prior year. These reports are available in yearly, monthly, and quarterly versions.

If you are not using A/R, or if you have answered N to the question *Keep customer comparatives ?* in *Control information*, you may skip this chapter.

This function expects you to close your periods in A/R twelve times a year.

The reports are derived, not directly from A/R master data, but rather from Customer Comparatives maintained within S/A itself. Before you can run these reports you must have put data into it. There are three ways of doing so:

- *Load customer comparatives* lets you create an entire year's worth of data from either Customers or Invoice History. You would use this selection primarily upon initial installation of S/A.
- *Transfer customer comparative data* captures one accounting period's data. You would routinely run this selection as part of your period-close processing.
- *Enter customer comparatives* allows you to enter statistics for an individual customer.

Once you have done all this, you are free to print reports. Monthly, Quarterly, and Yearly reports are described in this chapter.

### Deleted Customers

S/A automatically maintains a single record on file for deleted customers. You cannot access or change this record directly. Whenever (in the A/R Customers selection) you delete a customer, that customer's S/A totals are rolled into this deleted customer record. This ensures that your total sales for a past period are not under-reported merely because some customers no longer exist.

This dummy customer appears on reports with a customer number of none and a name of deleted customers. Of course, the dummy is not assigned to any sales representative, sales territory, ZIP code, or any other of the categories by which you print reports; so it appears only when All has been specified for the selection criteria.

#### Select

*Load customer comparatives* from the *Customer comparatives* menu.

## LOAD CUSTOMER COMPARATIVES

This selection lets you create an entire fiscal year's worth of data from either Customers or Invoice History. You would use this selection primarily upon initial installation of S/A.

### Where does the information come from?

The most desirable position to be in for loading comparatives is to have available Invoice History, which has not been purged for the last five years.

Failing this, you may be able to restore (from your backup sets) earlier versions of Invoice History, to a dummy company, which you temporarily create for the purpose. The *Load customer comparatives* selection allows you to cross company boundaries for the purpose of accessing this dummy company.

- Be aware that you will have to apply any intervening upgrades to this dummy company before doing the load.
- Any intervening *Reformat account number* selection which you may have run are not a consideration here (as they are when loading item comparatives).
- If you changed a customer's number by running the Master Key Conversion tool, then this would interfere with the data being assigned to the correct customer.
- Loading from Invoice History allows you to load by period, but loading from Customers only allows loading yearly totals.

If you have converted from another vendor's accounting package, you or your PBS provider may be able to reformat your old master data into a sufficiently close resemblance to Passport data so that *Load customer comparatives* will be able to process it. See the Field Definition Guide for this information.

The next best choice is to enter historical information by hand, as described in this chapter.

Failing all the above, you can simply dispense with loading earlier history and content yourself with future history.

Note that the current fiscal year must be defined as containing monthly data, not yearly data. If you do not happen to install S/A during the first period of your fiscal year, the earlier periods can be loaded from Invoice History. If Invoice History is not available (you don't keep it, or it has been purged), there is no way to load the earlier periods of the current year (other than entering them manually).

If you have loaded the previous fiscal years from Customers, you will be left with a gap in your history. In future years you may prefer to have complete yearly data on file for the first year of operation (rather than partial monthly data). If so, any time after year-end you can load that year from Customers, thus filling the gap. You will have to override the warning telling you that the year is already loaded.

## Date Boundaries

If you are loading from the Customers, the amounts currently in the Year to date sales and Year to date costs fields will be loaded into Customer comparatives for the fiscal year you are loading.

If you are loading from Invoice History, individual invoices are assigned to a period based on the calendar month of the invoice date. No attempt is made to project your actual period-closing dates backwards into the past.

Therefore, if your history is loaded partly from one file and partly from the other, there may be slight gaps or overlaps from one year to the next.

## Deleted Customers

Sales to customers no longer with your current A/R Customers will be added to the catchall *deleted customers* record. An exception report will list these customers.

The following screen appears:

```
Customer comparatives (load)                XYZ Company

1. Fiscal year to be updated ?   [ ]
2. Use Invoice Hist or Customer file ?
3. Company ID

Enter the four digit year: 1999 1998
```

Enter the following information:

### 1. Fiscal year to be updated ?

Enter the fiscal year for which you want comparatives loaded. This year must appear as one of the columns on the first screen of the A/R interface control information selection. If the column heading for this fiscal year is set to (Mo) or (Yr), the year has already been loaded; you will be so warned and asked whether you wish to load the year again.

Format	9999
Example	Type: 2019

### 2. Use Invoice Hist or Customer file ?

Enter H for A/R Invoice History or C for A/R Customers. In making this choice, consider that:

- Customers does not contain a breakdown by period and cannot be used to load the current fiscal year. If you are using this as your source, you must be loading year-to-date data to a prior fiscal year. This in turn implies that you are working from a restored backup, not from your current production A/R Customers. The amounts for Year to date Sales and Year to date Costs from the Customers you are loading from are loaded into whatever year you specify. No check is done to verify that it is the correct information for the year you are loading.
- Accumulating Invoice History is optional, but if present it contains enough information for the system to capture totals by period. However, it may not go back to the beginning of the fiscal year, or conversely it may extend backwards several years. That depends on when you purged it last and what purge date you specified (purging occurs when you answer Y to the *Purge this history ?* question of the *A/R Invoice history (Print)* selection). Therefore, it may be necessary for you to work from a restored backup.

If you have selected the current fiscal year, this field defaults to I and may not be changed not even if you have chosen (in *A/R Control information*) not to keep invoice history. If this happens, the selection will run normally but no data will be loaded.

Format	One letter, either C or H. There is no default.
Example	Type: H

### Replace or Add to existing data?

This question appears only if you have chosen to accumulate Invoice History in the preceding question and you have provided loaded comparatives to this fiscal year. Because that data is purgeable at will, the data contents do not necessarily correspond to a single fiscal year. Multiple instances of the data may be needed to build a single fiscal year's worth of data (or conversely the data may span several years).

Enter R to replace all existing comparatives for this fiscal year, or A to add the information for this data to any pre-existing information for this year.

Format	One letter, either A or R. There is no default.
Example	Type: R

### 3. Company ID of .... file

...in the caption represents the ID number of whichever company you have chosen.

If you do not use the multi-company feature, this field is forced to 00.

This feature may be used if company identification has changed over the years. For instance, you may have gone from a single-company to a multi-company installation, or two companies may have merged.

A more likely use of this feature is to load data from a dummy company. For information on creating a new company, refer to the Defining *Multiple Companies* chapter of the *PBS Administration* documentation.

If you restore an earlier version of either file from your backups in order to capture that historical information, it is much safer to do the restore to a dummy company than to do it to your production company.

- For one thing, you do not have to back up and restore your production data, nor do you have to halt all other processing while you do the load.
- Another consideration is that you are free to apply any required upgrades to the restored data without disturbing your production company.

Enter the company-ID of the company you wish to load from.

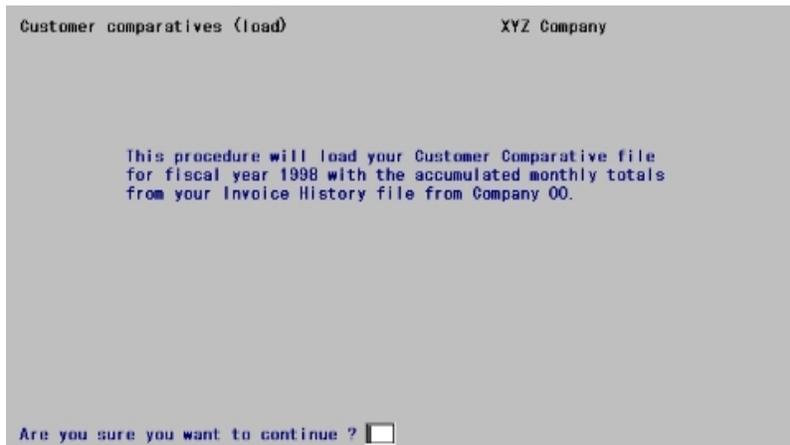
Format	Two characters. The default is whatever company you are now in.
Example	Press <Enter> to accept the default.

### Field number to change ?

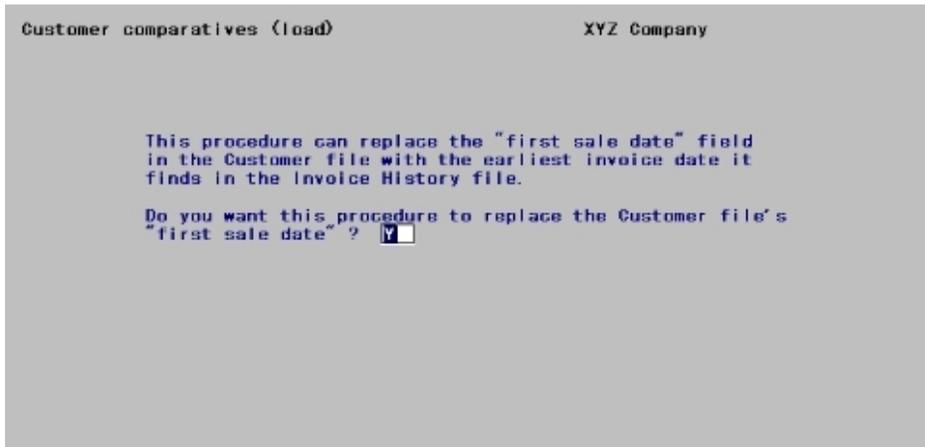
Make any needed changes. Upon pressing <Enter> with this field blank, one or more of the following screens will appear. In each case, answer Y to continue or N to cancel.

### If you are loading from Invoice History:

A screen similar to the following will appear:



If you answer Y the following will appear:

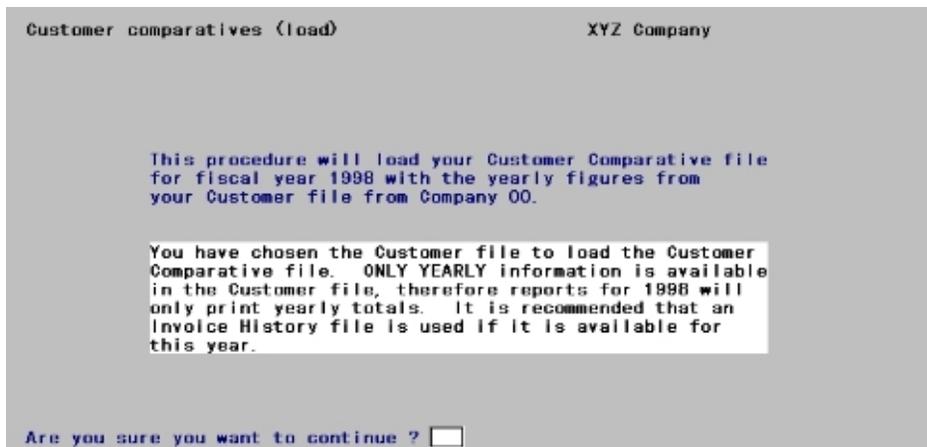


Answer Y to replace the date with the date of the earliest invoice on file (which may be for an earlier year than you are currently loading). Answer N to leave the dates alone.

Note that if your Invoice History has been purged more recently than your upgrade to PBS, you should answer N.

### If you are loading from Customers:

A screen similar to the following will appear:



Answer Y to continue or N to cancel.

### Whichever file or table you are loading from:

There will be a period of processing while the data is loaded. The current record being processed will flash by on the screen. When processing is complete, you will be so informed. Press <Esc> to return to the previous menu.

A *Load Customer Comparatives Exception Report* will be produced. The only exception you are likely to be concerned with is an attempt to load a deleted customer. See a sample [Customer Comparative Exception Report](#) report in the *Sample Reports* appendix.

Upon successful loading of data from Invoice History or Customers, the column heading of that fiscal year in the first screen of the *A/R Interface Control information* selection will be set to (Mo) or (Yr) respectively.

After you have loaded every fiscal year you intend to, you should use the *A/R Interface control information* selection to change from Start-up mode to Regular mode. This will allow you to print customer comparative reports and to transfer data from A/R to S/A at the next period-end.

## TRANSFER CUSTOMER COMPARATIVE DATA

This selection captures one accounting period's data.

You would routinely run this selection as part of your A/R period-close processing. In fact, A/R will not let you close the period until you have done so.

### Select

*Transfer customer comparative data* from the *Customer comparatives* menu

The following screen appears:

```
Close a period (Transfer A/R totals)      XYZ Company
A/R current period ending: 5/31/99      Last transfer date:0/00/00

      Transferring sales and costs for the month of 5/1999.

      This function transfers the period-to-date sales and cost
      figures from the A/R Customer file for the current period
      into the Customer Comparative file.

Are you sure ? 
```

You will be informed if you attempt to transfer a period, which has already been transferred.

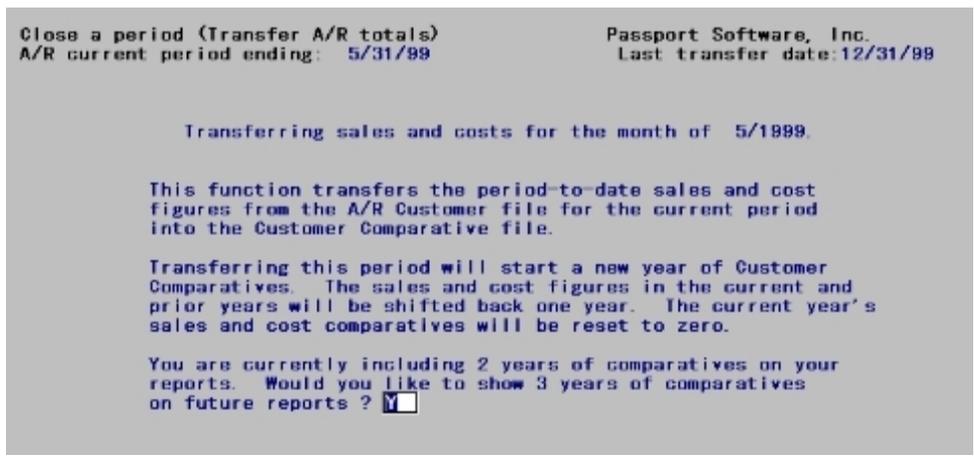
This selection transfers all the data on file at the time. This means that your periods do not have to correspond exactly with calendar months. You might choose to end each period on a Friday or a Saturday, or to force the months of each quarter to a pattern of 5 / 4 / 4 weeks. However, the system does expect twelve periods in each fiscal year, neither more nor less.

Answer Y to transfer the period's data, or N to cancel.

### At fiscal year-end / starting a new year

If you answer Y and if the period about to be transferred is the first period of your new fiscal year, all of your history will be rolled back one year and a new year will be created. This will be reflected in the first screen of the *S/A, A/R Interface control information* selection.

If you are currently carrying fewer than five years of S/A history, a screen similar to the following will appear:



If you intend to restrict your history to fewer than five years, answer N. Your oldest year of history will be discarded.

If you wish to continue accumulating history until you have reached the five-year maximum, answer Y. Your oldest year of history will be retained, and the number of years of history in *A/R Interface control information* selection will be increased by one.

There will be a period of processing while the data is transferred. The current record being processed will flash by on the screen. No report will be produced. When processing is complete, you will be so informed; press <Esc> to return to the previous menu.

## ENTER CUSTOMER COMPARATIVES

This selection lets you alter the statistics for an individual customer.

Suppose for instance that two of your customers have merged. You might want to consolidate their earlier history manually. Future business with the successor corporation can then be compared meaningfully to past business with the predecessor corporations.

For a customer to have an existing record, comparative amounts from at least one fiscal year must have been either *Loaded* or *Transferred* to Sales Analysis for that customer. The process of loading or transferring comparatives is what creates the record in comparatives.

This selection may be used for existing records but not for new ones. A record consists of all months and years for a single customer. That is, you can change data on file for a customer for a given year, or add a new year's data to an existing customer; but you cannot add a customer that is not already on file. Also, you may not delete a record.

This selection may also be used upon initial set-up of the package to enter prior history manually. You can do this either by period or a year at a time. If you do so, you must first set the column heading of that fiscal year to either (Yr) or (Mo), respectively, in the *A/R Interface control information* selection.

### Select

*Enter customer comparatives* from the *Customer comparatives* menu.

The following screen appears:

Customer Comparatives (Edit) XYZ Company

Fiscal year

Customer

Enter the four digit year:

You can use this screen to alter information about existing entries, but you can neither add nor delete an entry.

Enter the following information:

### Fiscal year

Enter the fiscal year. This must be one of the years for which you keep comparatives, as defined in S/A Control information.

Format	9999
Example	Type: 2019

### Customer

Enter the customer number whose comparatives you wish to modify. The customer must already be present in S/A Customer Comparatives.

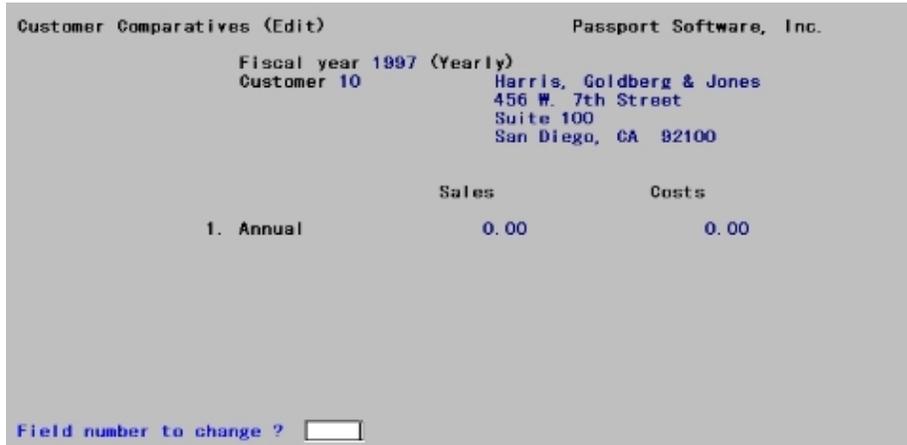
Upon selection of a valid customer, his name and address displays.

Format	12 characters
Example	Type: 10

The remainder of the information for this entry displays, and the cursor is positioned at *Field number to change ?*. If the heading for this fiscal year (in the S/A A/R *Interface control* information selection) is (Mo), the screen appears as:

Customer Comparatives (Edit)		XYZ Company	
Fiscal year 1999 (Monthly)		Customer 10	
		Harris, Goldberg & Jones	
		456 W. 7th Street	
		Suite 100	
		San Diego, CA 92100	
	Sales	Costs	
1. February	276.40	77.36	
2. March	26.50	9.00	
3. April	1,027.50	402.50	
4. May	618.22	74.01	
5. June	545.00	100.00	
6. July	0.00	0.00	
7. August	1,222.50	405.00	
8. September	2,845.00	565.90	
9. October	4,305.00	1,270.00	
10. November	3,572.50	897.50	
11. December	0.00	0.00	
12. January	276.40	77.36	
Field number to change ? <input type="text"/>			

If the heading for this fiscal year is (Yr), the screen appears as:



Enter the following:

- 1. through 12. (Periods) or
- 1. (Year)

For each field, enter the Sales and Cost subfields.

**Sales**

Format	999999999999.99-
Example	Press <Enter> to leave the data unchanged.

**Costs**

Format	999999999999.99-
Example	Press <Enter> to leave the data unchanged.

**Field number to change ?**

Change the fields as needed. Upon pressing <Enter> with this field blank, your entry will be accepted and the cursor will be positioned for the next entry. Press <Esc> to return to the previous menu.

## CUSTOMER COMPARATIVES - MONTHLY

This selection allows you to print reports similar to those available from the various *Customer* selections, but with the added ability to compare monthly figures to other months of this fiscal year or previous ones.

In order to use this selection, you must have answered Y to the question *Keep customer comparatives* in the *A/R Interface control information* selection. You must also be in Regular (as opposed to Set-up) mode, and must have loaded at least one year of comparative information.

See a sample [Monthly Customer Comparatives](#) report in the *Sample Reports* appendix.

### Select

*Monthly existing* or *Monthly new* from the *Customer comparatives*.

Two screens are needed to accommodate this selection. The first screen now appears:

```

Customer Comparatives (Monthly)                                XYZ Company

1. Report/Summary/Export                                     
2. Starting customer
3. Ending customer
4. State
5. Sales rep
6. Customer type
7. Sales territory
8. SIC
9. Sort order
10. Include subtotals on detail pages ?
11. Include page breaks ?

R = Report   S = Summary   E = Export
    
```

Enter the following information:

### 1. Report/Summary/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, or E. There is no default.
Example	Type: R, then press <Enter>

Note the absence of the usual *Label* option. To print labels, use the *Customer* selection.

### 2. Starting customer and 3. Ending customer

Enter the range of customers to select. Follow the screen directions.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

#### 4. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

#### 5. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

#### 6. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

#### 7. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

#### 8. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>

#### 9. Sort order ?

If you have chosen (in *A/R Control information*) not to use sales representatives, this field displays a (*Not applicable*) and may not be entered. The report in that case is in straight customer number sequence.

You have a choice of two sequences:

R	Sales representative. The report will be in order by the salesman currently responsible for a customer, and within that by customer number.
C	Customer number. The report will be in straight customer number sequence.

Enter a sequence:

Format	One letter from the list above.
Example	Type: C

**10. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

**11. Include page breaks ?**

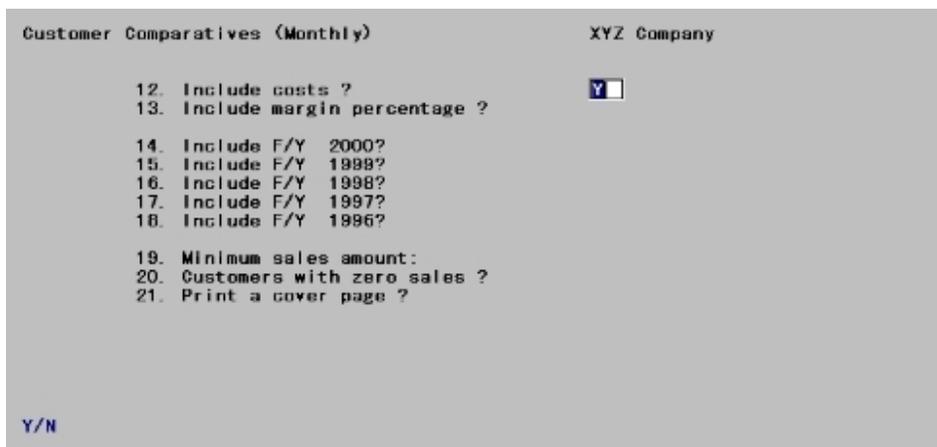
Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

**Customer comparatives - monthly: second screen**

The following screen appears:



Enter the following information:

**12. Include costs ? and**

**13. Include margin percent?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**14. through 18. Include FY nnnn ?**

*nnnn* represents the year number of the current fiscal year and the four previous ones. These display on the screen in reverse chronological sequence. If fewer than five years are defined in S/A Control information, or if any year has not been loaded, the undefined year[s] display as (*Not applicable*) and may not be entered.

A fiscal year may be included in monthly comparative reports even though *Control information* specifies that the data on file is not broken down by period. In such cases the yearly totals are shown on the report but the monthly columns are left blank (that is, no attempt is made to pro-rate the data among the months).

Enter Y for each year you wish included on the report.

Format	One letter, either Y or N, at each field. The default is Y.
Example	Press <Enter> at each field to accept the default.

**19. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**20. Customers with zero dollar sales**

Format	One letter, either E, O, or I. There is no default.
Example	Type: I

**21. Print a cover page ?**

**Field number to change ?**

**Options**

Make any needed changes, or use the option:

<SF1>	To return to the previous screen (entries already made on this screen will be preserved when you return to it).
-------	---

Upon pressing <Enter> with this field blank, the Customer Comparatives Report will print. Customer comparatives - quarterly

## CUSTOMER COMPARATIVES - QUARTERLY

This selection allows you to print quarterly reports similar to the monthly reports described in the previous section.

You can obtain quarterly reports without necessarily having obtained the monthly ones. You need only print what you want. However, you must have answered Y to the question, *Keep customer comparatives ?* in the *A/R Interface control information* selection. You must also be in Regular (as opposed to Set-up) mode and must have loaded at least one year of comparative information.

The system automatically groups months into quarters by threes.

Quarterly reports can be printed at any time, not just at year-end. Future quarters of the current fiscal year are simply left blank; the current quarter includes only those months within that quarter which have already been transferred.

See a sample [Quarterly Customer Comparatives](#) report in the *Sample Reports* appendix.

### Select

*Quarterly existing* or *Quarterly new* from the *Customer comparatives* menu.

Two screens are needed to accommodate this selection. The first screen now appears:

```
Customer comparatives (Quarterly)                XYZ Company

1. Report/Summary/Export      
2. Starting customer
3. Ending customer

4. State
5. Sales rep

6. Customer type
7. Sales territory
8. SIC

9. Sort order
10. Include subtotals on detail pages ?
11. Include page breaks ?

R = Report   S = Summary   E = Export
```

### 1. Report/Summary/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, or E. There is no default.
Example	Type: R, then press <Enter>

To print labels, use the Customer selection.

### 2. Starting customer and

### 3. Ending customer

Enter the range of customers to select. Follow the screen directions.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 4. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

### 5. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

### 6. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

### 7. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

### 8. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>

### 9. Sort order

If you have chosen (in *A/R Control information*) not to use sales representatives, this field displays a (*Not applicable*) and may not be entered. The report in that case is in straight customer number sequence.

You have a choice of two sequences:

R	Sales representative. The report will be in order by the salesman currently responsible for a customer, and within that by customer number.
C	Customer number

Enter a sequence:

Format	One letter from the list above.
Example	Type: C

### 10. Include subtotals on detail pages ?

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

### 11. Include page breaks ?

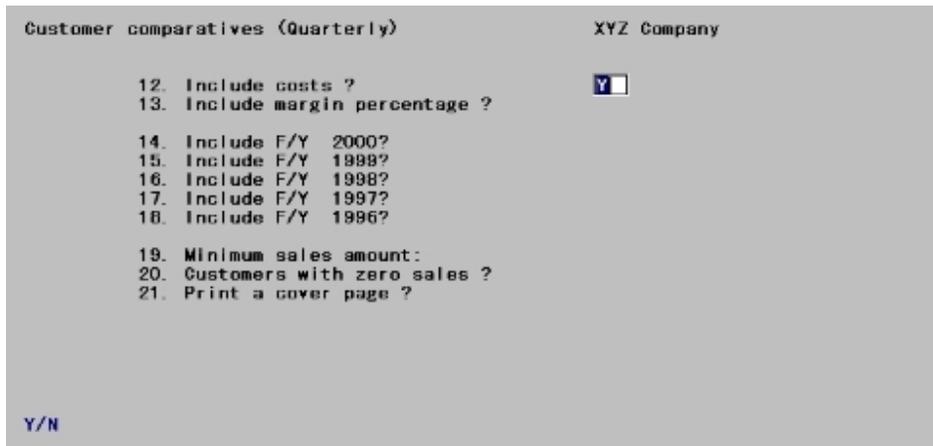
Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

## Customer comparatives - quarterly: second screen

The following screen appears:



Enter the following information:

**12. Include costs ? and  
13. Include margin percent ?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**14. through 18. Include FY nnnn ?**

*nnnn* represents the year number of the current fiscal year and the four previous ones. These display on the screen in reverse chronological sequence. If fewer than five years are defined in *S/A Control information*, the undefined year(s) display as *(Not applicable)* and may not be entered.

A fiscal year may be included in quarterly comparative reports even though *Control information* specifies that the data on file is not broken down by period. In such cases the yearly totals are shown on the report but the quarterly columns are left blank (that is, no attempt is made to pro-rate them).

Enter Y for each year you wish included on the report.

Format	One letter, either Y or N, at each field. The default is Y.
Example	Press <Enter> at each field to accept the default.

**19. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**20. Customers with zero dollar sales**

Format	One letter, either E, O, or I. There is no default.
Example	Type: I

**21. Print a cover page ?**

**Field number to change ?**

**Options**

Make any needed changes, or use the option:

<SF1>	To return to the previous screen (entries already made on this screen will be preserved when you return to it).
-------	---

Upon pressing <Enter> with this field blank, the Customer Comparatives Report will print. You may be asked to select a printer; refer to the *Starting PBS, Menus and Printing* chapter of the *System User* documentation.

## CUSTOMER COMPARATIVES - YEARLY

This selection allows you to print yearly reports similar to the monthly and quarterly reports described in previous sections.

You can obtain the yearly reports without previously having obtained the quarterly or monthly ones. You need only print what you want. However, you must have answered Y to the question Keep customer comparatives in the *A/R Interface control information* selection. You must also be in Regular (as opposed to Set-up) mode and must have loaded at least one year of comparative information.

Yearly reports can be printed at any time, not just at year-end. The amounts accumulated for the year up to the point in time you print the report will be included on the report.

See a sample [Yearly Customer Comparatives](#) report in the *Sample Reports* appendix.

### Select

*Yearly existing* or *Yearly new* from the *Customer comparatives* menu.

Two screens are needed to accommodate this selection. The first screen now appears:

```

Customer Comparatives (Yearly)                                XYZ Company

1. Report/Summary/Export                                     
2. Starting customer
3. Ending customer

4. State
5. Sales rep
6. Customer type

7. Sales territory
8. SIC

9. Report type

10. Sort by

R = Report   S = Summary   E = Export
    
```

Enter the following information:

### 1. Report/Summary/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, or E. There is no default.
Example	Type: R, then press <Enter>

Note the absence of the usual Label option. To print labels, use the Customer selection.

### 2. Starting customer and

### 3. Ending customer

Enter the range of customers to select. Follow the screen directions.

Format	12 characters
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### 4. State

Enter the postal abbreviation of the state you wish to include.

Format	Two characters
Example	Press <F5>

### 5. Sales rep

Enter the sales representative.

Format	Three characters
Example	Press <F5>

### 6. Customer type

Enter the customer type.

Format	Five characters
Example	Press <F5>

### 7. Sales territory

Enter the sales territory.

Format	Three characters
Example	Press <F5>

### 8. SIC

Enter the SIC here.

Format	Six characters
Example	Press <F5>

### 9. Report type

This field lets you print the report for:

A	All customers on file, whether or not they have had activity in any particular year
N	New customers (those who have had activity in a particular year [to be selected next] but not in the previous year)
I	Inactive customers (those who are still on file but have had no activity in a particular year [to be selected next])

If you select A, you can print the report for more than one year; however if you select N or I, the report is printed for a single year.

Enter a report Type:

Format	One letter from the list above.
Example	Type: A

What you are asked next depends on what report type you have entered.

#### If you have chosen all customers

##### Include which year(s) ?

A box opens showing each year for which comparatives exist (as defined in Control information), up to a maximum of five. Enter Y or N for each year.

Format	Y or N for each year shown. The default is Y.
Example	Press <Enter> at each row to accept the default.

##### Sort by sales amt in which year ?

Any of the selected years can be used to define the sequence of the report. Enter one of the years selected in the previous field.

Format	9999
Example	Type: 2019

#### If you have chosen inactive customers

##### Inactive in which year ?

Enter the year for which the customers you wish to see where inactive. This can be any of the years for which comparatives exist (as defined in Control information).

Format	99
Example	Does not appear in this example.

**If you have chosen new customers**

**New in which year ?**

Enter the year for which you want to see new customers. This can be any year for which comparatives exist (as defined in Control information). If the customer first sale date in A/R Customers falls in this year, they will be included on the report.

Format	99
Example	Does not appear in this example.

**10. Sort by**

You have a choice of three sequences:

A	Sales amount
S	Sales amount within state (meaning the state of the customer's current bill-to address)
R	Sales amount within sales representative (meaning the representative currently responsible for a customer)

Enter a sequence:

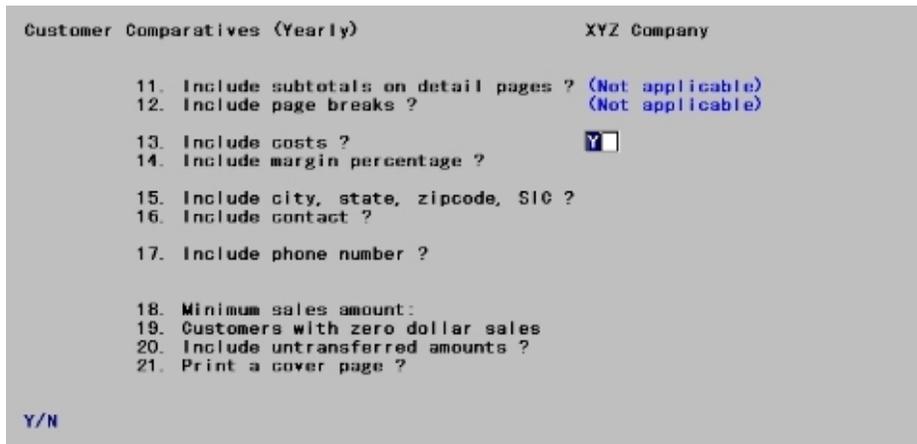
Format	One letter from the list above.
Example	Type: A

**Field number to change ?**

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

**Customer comparatives - yearly: second screen**

The second screen appears as follows:



Enter the following information:

**11. Include subtotals on detail pages ?**

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

**12. Include page breaks ?**

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

**13. Include costs ? and  
14. Include margin percent?**

Format	One letter at each field, either Y or N. The default is N.
Example	Press <Enter> at each field for the default.

**15. Include city, state, zip code, SIC ?**

[If you have chosen to print a summary report, this field displays as Not applicable and may not be entered.]

Enter Y if you wish these fields included on the report.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> to accept the default.

**16. Include contact ?**

[If you have chosen to print a summary report, this field displays as Not applicable and may not be entered.]

Enter Y to include a contact name for each customer.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter>

**Contact 1 or 2 ?**

This question only appears if you have answered Y to the preceding. Specify which contact you wish to appear on the report.

Format	One digit, either 1 or 2. There is no default.
Example	Type: 1

**17. Include phone number ?**

[If you have chosen to print a summary report, this field displays as Not applicable and may not be entered.]

Enter Y to include a contact phone number for each customer.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter>

**Phone 1 or 2 ?**

This question only appears if you have answered Y to the preceding. Specify which contact you wish to appear on the report.

Format	One digit, either 1 or 2. There is no default.
Example	Type: 1

**18. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**19. Customers with zero dollar sales**

Format	One letter, either E, O, or I. There is no default.
Example	Type: I

**20. Include untransferred amounts ?**

This lets you include amounts from the current period before that period has been closed or its information has been transferred from A/R to S/A. You can get meaningful year-end reports without having to wait for formal closure of the accounting year.

Enter Y to include untransferred amounts, or N exclude them.

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter>

**21. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will be preserved when you return to it)

Upon pressing <Enter> with this field blank, the *Customer Comparatives Report* will print.

# Item Comparatives

This chapter contains the following topics:

<a href="#">Introduction to Item Comparatives</a>	.....
<a href="#">Load Item Comparatives</a>	.....
<a href="#">Transfer Item Comparative Data</a>	.....
<a href="#">Enter Item Comparatives</a>	.....
<a href="#">Item Comparatives</a>	.....
<a href="#">Item Comparatives - Second Screen</a>	.....

## INTRODUCTION TO ITEM COMPARATIVES

These reports require that the A/R and I/C packages be installed, and *Keep item comparatives ?* in *S/A Control information* is set to *Yes*. If not, skip this chapter.

The reports are available whether or not you keep history in either I/C or A/R.

The Item Comparative Reports allow you to compare results by item from one period to another, or to a corresponding period in some prior year. They are available in yearly, monthly, and quarterly versions. This function expects you to close your periods in I/C twelve times a year.

The reports are derived, not directly from I/C master data, but rather from Item Comparatives maintained within S/A itself. Before you can use this report, you must have put data into it. There are three ways of doing so:

- [Load Item Comparatives](#) lets you create an entire year's worth of data from Invoice History. You would use this selection primarily upon initial installation of S/A.
- [Transfer Item Comparative Data](#) captures one accounting period's data. You would routinely run this selection as part of your period-close processing.
- [Enter Item Comparatives](#) allows you to enter statistics for an individual item.

Once you have done all this, you can print reports. Monthly, Quarterly, and Yearly reports are described in this chapter.

### Deleted items

S/A optionally maintains a single dummy record on file for deleted items. When you use the function, Load Item Comparatives, if records are found in A/R Invoice History for items that no longer exist in I/C Items, they will be added to this dummy record.

- If you choose (in *I/C Interface control information*) not to use this feature, be aware that past sales could be under-represented in your comparative reports (because records will be dropped from Item Comparatives whenever the corresponding entries are deleted via the I/C Items selection).
- If you do use this feature, whenever an item is deleted its S/A totals are rolled into the *deleted item record*.

You cannot access or change this catchall record directly. It appears on reports with an item number of none and a name of deleted items. Of course, the dummy is not assigned to any ABC code, vendor, inventory account number, category, warehouse, or any other of the classifications by which you print reports; so it appears on a report only when All has been specified for the selection criteria.

Also if an item that has comparatives on file is detected from Items in I/C, it will no longer print on Item comparative reports.

### Select

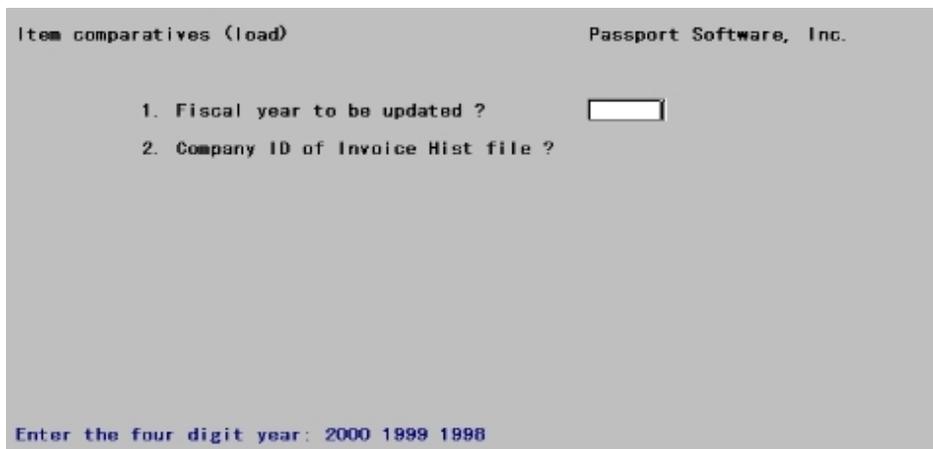
*Load item comparatives* from the *Item comparatives* menu.

## LOAD ITEM COMPARATIVES

This selection lets you create an entire fiscal year's worth of data from A/R Invoice History. You would use this selection primarily upon initial installation of S/A.

Invoice History may be a convenient source since it may contain more than a year's worth of data. However, this data is optional so you may not even be using it. Also, you do not necessarily purge the data only at fiscal year-end. If you purge twice a year, you would have to run the Load item comparatives selection twice to capture one year's data after restoring the appropriate backups of Invoice History.

The following screen appears:



Enter the following information:

### 1. Fiscal year to be updated ?

Enter the fiscal year for which you want comparatives loaded. This must be one of the years for which comparatives are kept (as defined in *S/A Control information*), and data for that year must actually be present in A/R Invoice History.

Format	9999
Example	Type: 2019

If comparatives already exist for the fiscal year being loaded, you will be warned of this and asked if you want to continue. If you choose to continue, you will be asked if you want to replace or add to existing data.

### 2. Company ID of Invoice History file?

If you do not use the multi-company feature, this field is forced to 00.

This feature is provided in case company identification has changed over the years. For instance, you may have gone from a single-company installation to a multi-company one.

Format	Two characters. The default is your current Company ID.
Example	Press <Enter> to accept the default.

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, there will be a period of processing while the data is loaded. The current record being processed will display on the screen. No report will be produced. When processing is complete, you will be so informed; press <Esc> to return to the previous menu.

## TRANSFER ITEM COMPARATIVE DATA

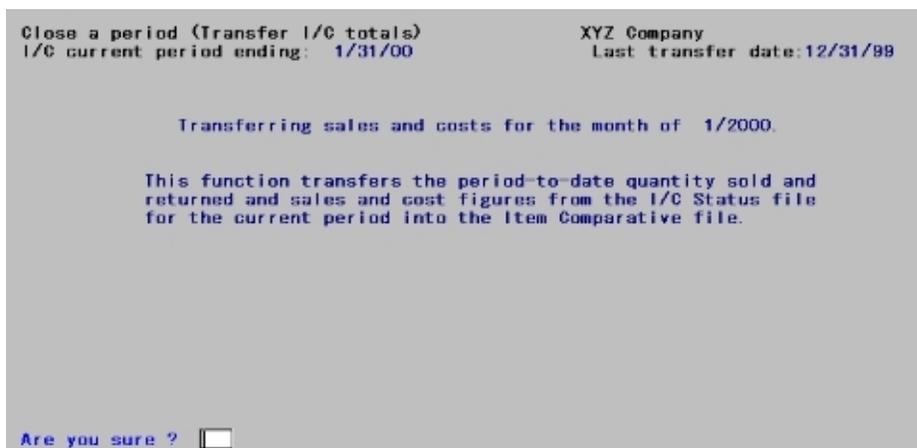
This selection captures one accounting period's data.

You would routinely run this selection as part of your I/C period-close processing. In fact, I/C will not let you close the period until you have done so.

### Select

*Transfer item comparative data* from the *Item comparatives* menu.

The following screen appears:



You will be informed if you attempt to transfer a period, which has already been transferred.

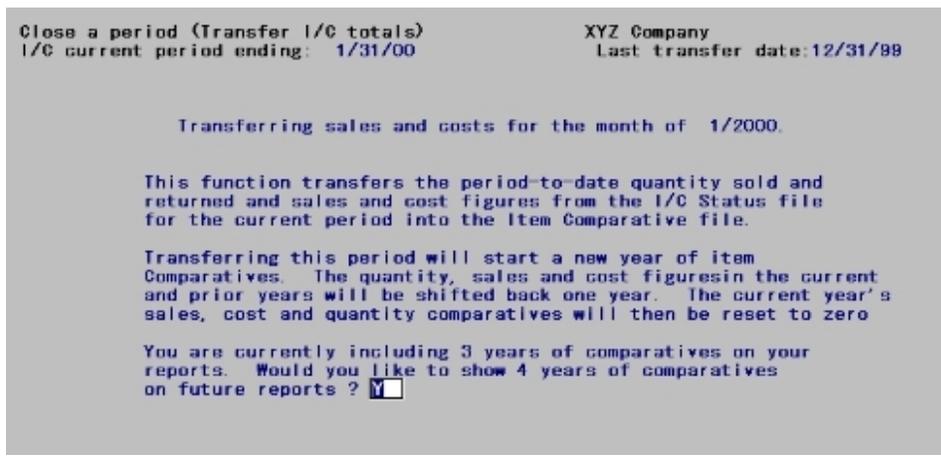
This selection transfers all the data on file at the time. This means that your periods do not have to correspond exactly with calendar months. You might choose to end each period on a Friday or a Saturday, or to force the months of each quarter to a pattern of 5/4/4 weeks. However, the system does expect twelve periods in each fiscal year, neither more nor less.

Answer Y to transfer the period's data, or N to cancel.

### At fiscal year-end

If you answer Y and if the period about to be transferred is the first period of your new fiscal year, all of your history will be rolled back one year and a new year will be created. This will be reflected in the first screen of the *S/A I/C Interface control information* selection.

If you are currently carrying fewer than five years of S/A history, a screen similar to the following will appear:



If you intend to restrict your history to fewer than five years, answer N. Your oldest year of history will be discarded.

If you wish to continue accumulating history until you have reached the five-year maximum, answer Y. Your oldest year of history will be retained, and the number of years of history in *I/C Interface control information* selection will be increased by one.

There will be a period of processing while the data is transferred. The current record being processed will flash by on the screen. No report will be produced. When processing is complete, you will be so informed; press <Esc> to return to the previous menu.

## ENTER ITEM COMPARATIVES

This selection lets you to alter the statistics for an individual item.

Suppose for instance that one item has replaced another item, which you no longer carry in inventory. You might want to consolidate the earlier history of the two items manually so that future sales of the replacement item can be compared meaningfully to past sales of the old item.

This selection may be used for existing records but not for new ones. That is, you can change data on file for an item for a given year, or add a new year's data to an existing item. You cannot add an item that is not already on file. Also, you may not delete a record. For an item to have an existing record, comparatives have to have been either Loaded or Transferred to Sales Analysis for at least one fiscal year. The process of Loading or Transferring is what creates the record in comparatives.

This selection may also be used upon initial set-up of the package to enter prior history manually. If you do so, you must first set the column heading of that fiscal year to <Yes> in the I/C interface control information selection.

### Select

*Enter item comparatives* from the *Item comparatives* menu.

The following screen appears:

Item Comparatives (Edit) Passport Software, Inc.

Fiscal year

Item

Enter the four digit year: 2000 1999 1998

You can use this screen to alter information about existing entries, but you can neither add nor delete an entry.

Enter the following information:

### Fiscal year

Enter the fiscal year. This must be one of the years for which you keep comparatives, as defined in S/A Control information.

Format	9999 The current year displays as the default.
Example	Press <Enter> to accept the default.

**Item**

Enter the item number whose comparatives you wish to modify. The item must already be present in Item Comparatives.

Upon entry of a valid item number, the first two lines of its description will display.

Example	Enter item 1
---------	--------------

The remainder of the information for this entry displays, and the cursor is positioned at *Field number to change ?*:



The above shows a separate numbered field for each reporting period of the fiscal year. This is the case when this fiscal year is described (in Control information) as containing monthly data. If not, there is only a single field for the entire year.

**1. through 12. (Periods) or  
1. (Year)**

For each field, enter the Sales, Cost, Quantity Sold, and Quantity Returned subfields. The margin is obtained by subtraction and not entered separately.

**Sales**

Format	999999999.99-
Example	Press <Enter> to leave the data unchanged.

**Costs**

Format	999999999.99-
Example	Press <Enter> to leave the data unchanged.

Upon pressing <Enter> with *Field number to change ?* blank, a similar screen to the one that display *Sales and Costs* will appear for *Quantity sold* and *Quantity returned*. Your cursor will be positioned at *Field number to change ?*.

### Quantity sold

Format	999999999.99999-
Example	Press <Enter> to leave the data unchanged.

### Quantity returned

Format	999999999.99999-
Example	Press <Enter> to leave the data unchanged.

### Field number to change ?

Change the fields as needed. Upon pressing <Enter> with this field blank, your entry will be accepted and the cursor will be positioned for the next entry. Press <Esc> to return to the previous menu.

## ITEM COMPARATIVES

This selection allows you to print reports similar to those available from the various Items selections, but with the added ability to compare monthly figures to other months of this fiscal year or previous ones.

In order to use this selection, you must have answered Y to the question. Keep item comparatives in the I/C *Interface control information* selection. You must also be in Regular (as opposed to Set-up) mode, and must have loaded at least one year of comparative information.

The screens for requesting the monthly, quarterly, and yearly item comparative reports are identical to one another and are all documented in this section.

### Select

*Item comparatives*. Then select:

*Monthly existing ...*

*Monthly new*

*Quarterly existing...*

*Quarterly new*

*Yearly existing...*

*Yearly new*

Choose whichever selection is desired.

See a sample [Monthly Item Comparatives](#) report in the *Sample Reports* appendix.

Two screens are needed to accommodate this selection. The first screen now appears:

```
Item Comparatives (Monthly)                                Passport Software, Inc.

1. Report/Summary/Export      
2. Starting item number
3. Ending item number
4. Category
5. Sub-category
6. ABC code
7. Vendor
8. Inventory account #
9. Sort order

R = Report   S = Summary   E = Export
```

Enter the following information:

### 1. Report/Summary/Export

Enter the type of report you wish to create.

Format	One letter, either R, S, or E. There is no default.
Example	Type: R, then press <Enter>

To print labels, use the Item reports selection.

### 2. Starting item number and

### 3. Ending item number

Enter the range of items to select. Follow the screen directions.

Format	12 characters
Example	Press <F2> at each field for First through Last

### 4. Category

Enter the product category.

Format	Five characters
Example	Press <F5>

### 5. Sub-category

Enter the product sub-category.

Format	Five characters
Example	Press <F5>

### 6. ABC code

Enter the ABC code to be shown.

Format	One letter, either A, B, or C. There is no default.
Example	Press <F5>

### 7. Vendor number

Enter a vendor number.

Format	Six characters
Example	Press <F5>

### 8. Inventory account number

Enter the inventory account number.

Format	Your standard account number format, in segments, as defined in Company information.
Example	Press <F5>

### 9. Sort order

Enter either:

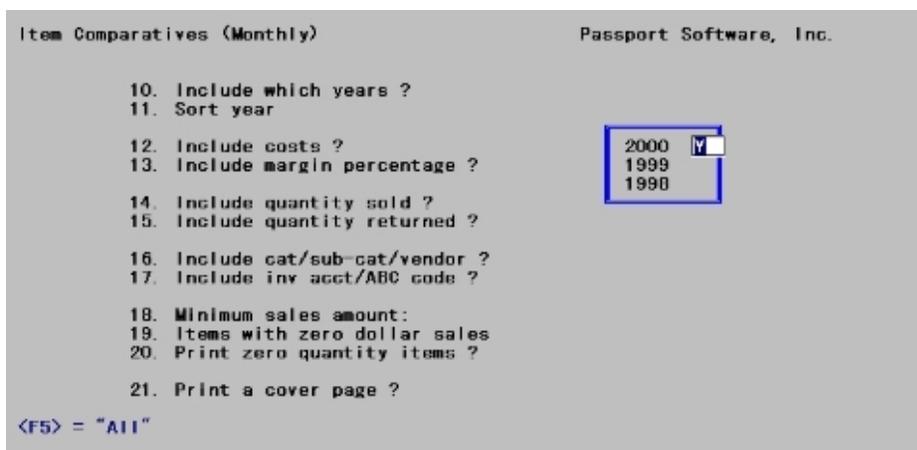
S	To print the items in sequence by Amount of the sales.
Q	To print the items in sequence by Quantity of the sales.
Format	One letter from the list above. There is no default.
Example	Type: S

### Field number to change ?

Make any needed changes. Upon pressing <Enter> with this field blank, the second screen will appear.

## Item Comparatives - Second Screen

The following screen appears:



Enter the following information:

### 10. Include which years ?

One to five years display in a window. If fewer than five years are defined in *S/AI/C interface control information*, the undefined year[s] do not display and may not be entered.

Enter Y for each year you wish included on the report.

Format	One letter, either Y or N, at each field. The default is Y.
Example	Press <Enter> at each field to accept the default.

**11. Sort year**

Any of the selected years can be used to define the sequence of the report. Enter one of the years selected in the previous field. The year selected in this field will be used in conjunction with the sort order chosen in field #9 to determine the scenario in which items on the report are printing.

Format	9999
Example	Type: 2019

**12. Include costs ? and  
13. Include margin percentage ?**

Format	One letter, either Y or N. The default is Y.
Example	Press <Enter> for the default.

**14. Include quantity sold ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

**15. Include quantity returned ?**

Format	One letter, either Y or N. The default is N.
Example	Type: Y then press <Enter>

**16. Include cat/sub-cat/vendor ?**

If you have chosen to print a summary report, this field displays as (Not applicable) and may not be entered.

Enter Y if you wish the product category and sub-category, and the vendor number, included on the report.

Format	One letter, either Y or N. The default is Y
Example	Press <Enter> to accept the default.

**17. Include inv account/ABC code ?**

If you have chosen to print a summary report, this field displays as (Not applicable) and may not be entered.

Enter Y if you wish the item's inventory account number and ABC code to be included on the report.

Format	One letter, either Y or N. The default is Y
Example	Press <Enter> to accept the default.

**18. Minimum sales amount**

Format	999999999999-
Example	Press <F7>

**19. Items with zero dollar sales**

Format	One letter, either E, O, or I. There is no default.
Example	Type: I, then press <Enter>

**20. Print zero quantity items ?**

This field allows you to choose whether you want to include or exclude items from the report, which you currently do not have in stock (whether or not they have experienced any sales during the period or interest). You also may choose to include only items with zero quantity on hand.

Format	One letter, either E, O, or I. There is no default.
Example	Type: I then press <Enter>

**22. Print a cover page ?**

**Field number to change ?**

Make any needed changes, or press <SF1> to return to the previous screen (entries already made on this screen will be preserved when you return to it).

Upon pressing <Enter> with this field blank, the Item Comparatives Report will print.

# Fast Analysis Reports

This chapter contains the following topics:

- [Introduction to Fast Analysis Reports](#) .....
- [Selecting Fast Analysis Reports](#) .....
- [By Customer](#) .....
- [Customer Sales Volume](#) .....
- [Customer Type](#) .....
- [Customers for an Item](#) .....
- [Customers for a Service](#) .....
- [Item](#) .....
- [Item Category](#) .....
- [Item Sales Volume](#) .....
- [Items for a Customer](#) .....
- [Sales Rep, Actual](#) .....
- [Sales Rep, Responsible](#) .....
- [Services for a Customer](#) .....
- [State](#) .....
- [ZIP code](#) .....

## INTRODUCTION TO FAST ANALYSIS REPORTS

Fast Analysis Reports provide a convenient way to produce simplified Sales Analysis reports. Parameter entry is kept to a minimum to decrease the complexity of setting up and generating meaningful reports.

You may decide that these simplified reports are entirely adequate for your business requirements. However, if you find that you need greater control over the setup and output of your reports, then you will probably want to use the standard Sales Analysis reports that are described in previous chapters of this documentation.

### Reports

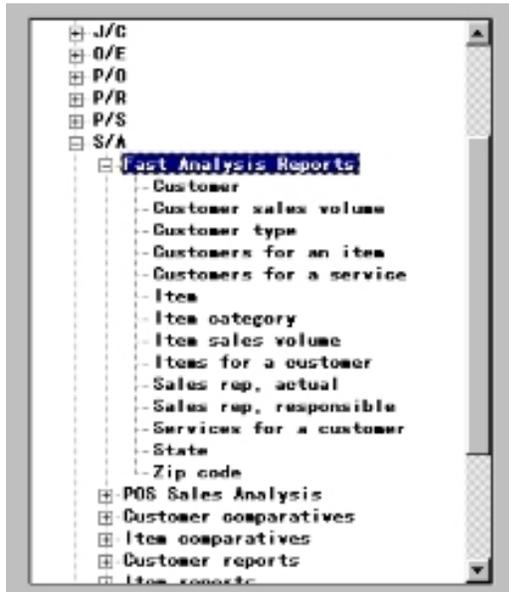
The following reports are available from the *Fast Analysis Reports* menu:

- Customer
- Customer sales volume
- Customer type
- Customers for an item
- Customers for a service
- Item
- Item category
- Item sales volume
- Items for a customer
- Sales rep, actual
- Sales rep, responsible
- Services for a customer
- State
- Zip code

## SELECTING FAST ANALYSIS REPORTS

### Select

*Fast Analysis Reports* from the Sales Analysis menu.



## BY CUSTOMER

The *Fast Analysis by Customer* report shows sales, cost of sales, and profit figures for period-to-date, year-to-date, and last year for each customer.

### Select

*Customer* from the *Fast Analysis Reports* menu. There are no additional report parameters to select for this report.

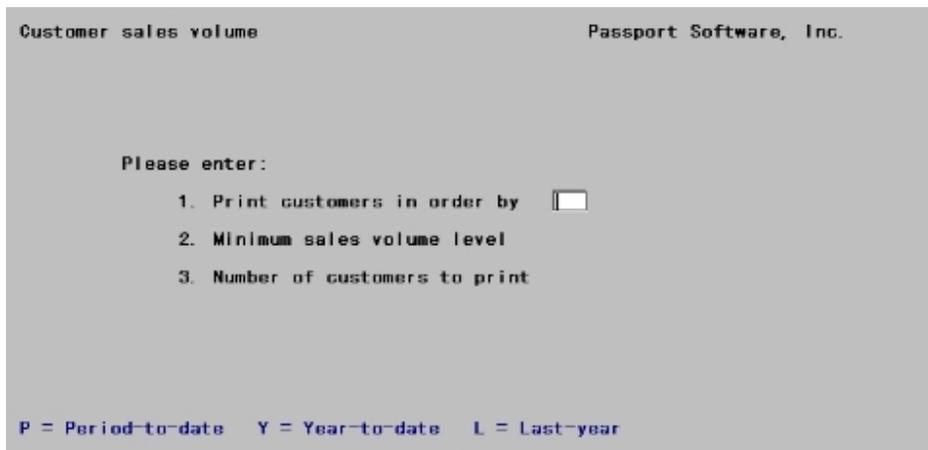
## CUSTOMER SALES VOLUME

The *Fast Analysis by Customer Sales Volume* report lists customers in order by sales volume. It shows sales, cost of sales, and profit figures for period-to-date, year-to-date, and last year for each customer.

See a sample [Fast Analysis by Customer Sales Volume](#) report in the *Sample Reports* appendix.

### Select

*Customer Sales Volume* from the *Fast Analysis Reports* menu.



#### 1. Print customers in order by

P	To show customers in order by their period-to-date sales volume
Y	To show customers in order by their year-to-date sales volume
L	To show customers in order by their last-year's sales volume

Format	One character
Example	Type Y

#### 2. Minimum sales volume level

Enter the minimum sales volume for a customer to appear on the report or press <F7> for "none", meaning no sales volume cutoff.

Format	Up to 12 digits
Example	Press <F7>

### 3. Number of customers to print

Enter the number of customers you want to show on the report, or press <F5> to show *All* customers.

The report will print customers in order by sales volume, from greatest to least, but will stop after the number of customers that you specify here.

Format	9999
Example	<F5>

## CUSTOMER TYPE

The *Fast Analysis by Customer Type* report shows sales, cost of sales, and profit figures for period-to-date, year-to-date, and last year for each customer. Customers are grouped according to their customer type, followed by a summary showing grand totals for all customers and for each type of customer.

### Select

*Customer type* from the *Fast Analysis Reports* menu. You are asked if you wish to print each customer on a separate page. Answer Y or N. There are no additional report parameters to select for this report.

See a sample [Fast Analysis by Customer Type](#) report in the *Sample Reports* appendix.

## CUSTOMERS FOR AN ITEM

The *Fast Analysis Customers for an Item* report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percent for a selected range of items and the customers those items were sold to, within four possible reporting periods.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume based on sales in the first selected reporting period.

See a sample [Fast Analysis - Customers for an Item](#) report in the *Sample Reports* appendix.

### Select

*Customers for an item* from the *Fast Analysis Reports* menu.

Customers for an item Passport Software, Inc.

1. Starting item
2. Ending item
3. Starting customer
4. Ending customer
5. Reporting periods
6. In order by sales volume ?
7. Minimum sales volume level
8. Number of items to print
9. Brief format ?

<F2> = "First"

### 1. Starting item and

### 2. Ending item

Enter the range of items to print on the report, or press <F2> for *First* and *Last*.

Format	15 characters
Example	Press <F2> at each field

### 3. Starting customer and

### 4. Ending customer

Enter the range of customers to print on the report, or press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field.

### 5. Reporting periods

Enter from 1 to 4 reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as not applicable.

### 7. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>

### 8. # customers to print

Enter the number of customers you wish to print for each item, press <F5> to print *All* customers.

Format	9999
Example	Press <F5>

### 9. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

### 10. Warehouse

You are asked for this information if you use multi-warehousing in I/C. Enter a warehouse press <F5> for *All* warehouses.

Format	Two characters
Example	Press <F5>

## CUSTOMERS FOR A SERVICE

The *Fast Analysis Customers for a Service* report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percent for a selected range of services and the customers those services were sold to, within four possible reporting periods.

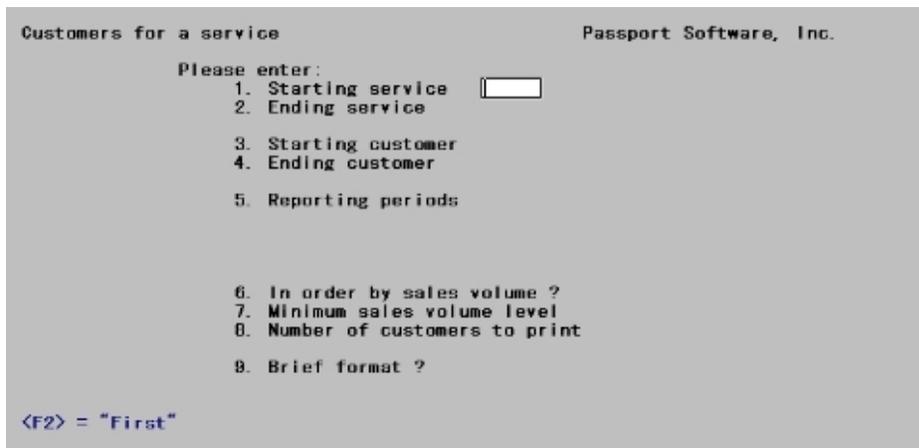
Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume based on sales in the first selected reporting period.

See a sample [Fast Analysis - Customers for a Service](#) report in the *Sample Reports* appendix.

### Select

*Customers for a service* from the *Fast Analysis Reports* menu.



#### 1. Starting service and

#### 2. Ending service

Enter the range of services to print on the report, press <F2> for *First* and *Last*.

Format	Three characters
Example	Press <F2> at each field

#### 3. Starting customer and

#### 4. Ending customer

Enter the range of customers to print on the report, press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field

### 5. Reporting periods

Enter from 1 to 4 reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display Not Applicable.

### 7. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>

### 8. # customers to print

Enter the number of customers you wish to print for each service, press <F5> to print *All* customers.

Format	9999
Example	Press <F5>

### 9. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

## ITEM

The *Fast Analysis by Item* report shows quantity sold, sales, cost of sales, and profit figures for period-to-date and year-to-date for each item.

See a sample [Fast Analysis by Item](#) report in the *Sample Reports* appendix.

### Select

Item from the *Fast Analysis Reports* menu.

```

Item                                     XYZ Company
Please enter:
1. Warehouse                            
2. Starting item #
3. Ending item #
4. Inventory account #
5. Product category
6. Product sub-category
7. ABC category
8. Show qty-returned
   for PTD and YTD ?
9. Dollar rounding ?
10. Show prior periods ?

<F5> = "All"
    
```

### 1. Warehouse

Enter a warehouse code.

### Options

You may also use one of the options:

<F5>	For <i>All</i> warehouses
Enter	For Central warehouse
Format	Two characters
Example	Press <F5>

### 2. Starting item # and

### 3. Ending item #

Enter the range of items to show on the report, or press <F2> for *First* and *Last*.

Format	15 characters
Example	Press <F2> at each field

#### 4. Inventory account #

##### Options

Enter the inventory account for which to show items, or use one of the options

<F2>	For the default inventory account in the I/C <i>Control information</i>
<F1>	For the next inventory account
<F5>	For <i>All</i>
Example	Press <F5> for <i>All</i>

#### 5. Product category

Specify the product category or press <F5> for *All* product categories.

Format	Five characters
Example	Press <F5> for <i>All</i> .

#### 6. Product sub-category

Specify the product sub-category press <F5> for *All* product sub-categories.

Format	Five characters
Example	Press <F5> for <i>All</i> .

#### 7. ABC category

Enter an ABC category press <F5> for *All*.

Format	One character
Example	Press <F5> for <i>All</i> .

#### 8. Show qty-returned for PTD and YTD?

Format	One character, Y or N
Example	Type: Y

#### 9. Dollar rounding?

Format	One character, Y or N
Example	Type: Y

**10. Show prior periods?**

Answer Y to show prior periods as defined in the I/C Control information, or N to show the current period only.

Format	One character, Y or N
Example	Type: Y

**Include qty-returned?**

This field displays only if you chose to show quantity returned in field 8 and chose to show prior periods in field 10.

Format	One character, Y or N
Example	Type: Y

## ITEM CATEGORY

The *Fast Analysis by Item Category* report shows quantity sold, sales, cost of sales, and profit figures for period-to-date and year-to-date for each inventory item, grouped according to the item's category or sub-category. A summary showing category or sub-category totals is printed at the end of the report.

See a sample [Fast Analysis by Item Category](#) report in the *Sample Reports* appendix.

### Select

*Item category* from the *Fast Analysis Reports* menu.

Item category  
Please enter  
1. Category   
2. Sub-category  
3. Sort by  
<F5> = "All"

### 1. Category

Enter the product category press <F5> for *All* product categories.

Format	Five characters
Example	Press <F5> for <i>All</i> .

### 2. Sub-category

Enter the product sub-category or press <F5> for *All* product sub-categories.

Format	Five characters
Example	Press <F5> for <i>All</i> .

### 3. Sort by

Enter C to sort by category or S to sort by sub-category.

Format	One character
Example	Type: C

**4. Print each category on a separate page?**

Format	One character, Y or N
Example	Type: N

**5. Inventory account #**

Enter the inventory account for which to show items.

You may also use one of the options:

<F2>	For the default inventory account in I/C <i>Control information</i>
<F1>	For the next inventory account
<F5>	For <i>All</i>
Example	Press <F5> for <i>All</i>

**6. Show qty-returned for PTD and YTD?**

Format	One character, Y or N
Example	Type: Y

**7. Dollar rounding?**

Format	One character, Y or N
Example	Type: Y

**8. Warehouse**

Enter a warehouse code.

**Options**

You may also use one of the options:

<F5>	For <i>All</i> warehouses
<Enter>	For Central warehouse

Format	Two characters
Example	Press <F5>

## ITEM SALES VOLUME

The *Fast Analysis Item Sales Volume* report lists inventory items in order by dollar sales volume, from greatest to least. It shows quantity sold, sales, cost of sales, and profit figures for period-to-date and year-to-date.

See a sample [Fast Analysis by Item Sales Volume](#) report in the *Sample Reports* appendix.

### Select

*Item sales volume* from the *Fast Analysis Reports* menu. 1. Period-to-date or year-to-date?

```

Item sales volume                                XYZ Company

Please enter:

  1. Period-to-date or year-to-date ? 
  2. Minimum sales volume level
  3. Inventory account #
  4. Product category
  5. Product sub-category
  6. Show qty-returned
    for PID and YID ?
  7. Number of items to print
  8. Dollar rounding ?
  9. Warehouse

P = Period-to-date   Y = Year-to-date
    
```

P	To show items in order by their period-to-date sales volume
Y	To show items in order by their year-to-date sales volume
Format	One character
Example	Type: P

### 2. Minimum sales volume level

This field allows you to examine the sales statistics for items whose sales equal or exceed a specified volume, and to ignore those items with sales volume below this level.

Enter the minimum sales volume for an item to appear on the report. or press <F7> for *None*, meaning no sales volume cutoff.

Format	Up to 12 digits
Example	Press <F7>

### 3. Inventory account #

Enter the inventory account for which to show items.

You may also use one of the options:

<F2>	For the default inventory account in I/C Control information
<F1>	For the next inventory account
<F5>	For <i>All</i>
Example	Press <F5> for <i>All</i>

### 4. Product category

Specify the product category press <F5> for *All* product categories.

Format	Five characters
Example	Press <F5> for <i>All</i>

### 5. Product sub-category

Specify the product sub-category or press <F5> for *All* product sub-categories.

Format	5 characters
Example	Press <F5> for <i>All</i>

### 6. Show qty-returned for PTD and YTD?

Format	One character, Y or N
Example	Type: Y

### 7. Number of items to print

Enter the number of items to print on the report or press <F5> for *All* items.

Format	9999
Example	Press <F5> for <i>All</i> .

### 8. Dollar rounding?

Format	One character, Y or N
Example	Type: N

## 9. Warehouse

Specify a warehouse for this report.

### Options

You may also use one of the options:

<F5>	For <i>All</i> warehouses.
Enter	For Central warehouse
Format	Two characters
Example	Press <F5>

## ITEMS FOR A CUSTOMER

The *Fast Analysis Items for a Customer* report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percent for a selected range of customers and the items sold to these customers, within selected reporting periods. Percentages are based on sales and profits within selected reporting ranges.

You can print this report in order by sales volume based on sales in the first selected reporting period.

See a sample [Fast Analysis - Items for a Customer](#) report in the *Sample Reports* appendix.

### Select

*Items for a customer* from the *Fast Analysis Reports* menu.

```

Items for a customer                                Passport Software, Inc.

1. Starting customer 
2. Ending customer
3. Starting item
4. Ending item
5. Reporting periods

6. Dollar rounding ?
7. In order by sales volume ?
8. Minimum sales volume level
9. Number of items to print
10. Brief format ?

<F2> = "First"
    
```

#### 1. Starting customer

#### 2. Ending customer

Enter the range of customers to print on the report, or press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field.

#### 3. Starting item and

#### 4. Ending item

Enter the range of items to print on the report, or press <F2> for *First* and *Last*.

Format	15 characters
Example	Press <F2> at each field.

### 5. Reporting periods

Enter from one to four reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. Dollar rounding?

Format	One character, Y or N
Example	Type: N

### 7. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as *(Not applicable)*.

### 8. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>

### 9. Number of items to print

Enter the number of items you wish to print for each customer, or press <F5> to print *All* items.

Format	9999
Example	Press <F5>

### 10. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

## SALES REP, ACTUAL

The *Fast Analysis Sales Rep, Actual* report shows information about the actual sales made by a sales rep, versus the responsible sales made by a sales rep. A sales rep is responsible for a customer because the customer is assigned to him when you set up Customers.

The summary report prints period-to-date and year-to-date summary information for each sales rep.

The detail report, which you can sort by decreasing sales volume, shows the sales, cost of sales, profits, and margins for a specified number of customers for each sales rep.

See a sample [Fast Analysis by Actual Sales Rep](#) report in the *Sample Reports* appendix.

### Select

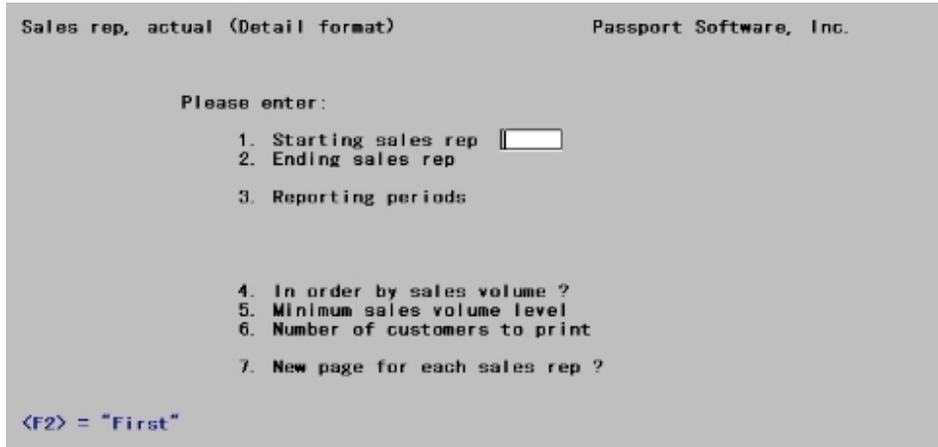
*Sales rep, actual* from the *Fast Analysis Reports* menu.



Select 1 for summary format or 2 for detail format. If you select summary format, no other entry parameters are required.

Example

Select 2 for detail report



**1. Starting sales rep and**

**2. Ending sales rep**

Enter the range of sales reps to print on the report, or press <F2> for *First* and *Last*.

Format	Three characters
Example	Press <F2> at each field

**3. Reporting periods**

Enter from 1 to 4 reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

**4. In order by sales volume?**

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as not applicable.

**5. Minimum sales volume level**

Enter a minimum sales volume level or press <F7> for None.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>

**6. Number of customers to print**

Enter the number of customers you wish to print for each sales rep, or press <F5> to print *All* customers.

Format	9999
Example	Press <F5>

**7. New page for each sales rep?**

Answer Y to start each new sales rep on a new page.

Format	One character, Y or N
Example	Type: N

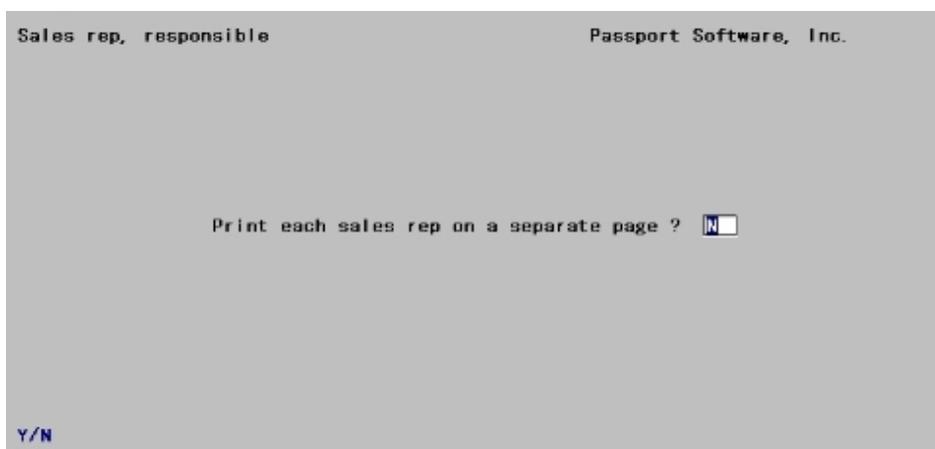
## SALES REP, RESPONSIBLE

The *Fast Analysis Sales Rep, Responsible* report shows information about the responsible sales made by a sales rep, versus the actual sales made by a sales rep. A sales rep is responsible for a customer because the customer is assigned to him when you set up Customers.

See a sample [Fast Analysis by Responsible Sales Rep](#) report in the *Sample Reports* appendix.

### Select

*Sales rep, responsible* from the *Fast Analysis Reports* menu.



Sales rep, responsible

Passport Software, Inc.

Print each sales rep on a separate page ?  N

Y/N

Answer Y or N to print each sales rep on a separate page. No other report entry parameters are required for this report.

## SERVICES FOR A CUSTOMER

The *Fast Analysis Services for a Customer* report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percent for a selected range of customers, and the services sold to these customers, within four possible reporting periods.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume based on sales in the first selected reporting period.

See a sample [Sales Analysis by Services for a Customer](#) report in the *Sample Reports* appendix.

### Select

*Services for a Customer* from the *Fast Analysis Reports* menu.

```
Services for a customer                                Passport Software, Inc.
Please enter:
1. Starting customer  
2. Ending customer
3. Starting service
4. Ending service
5. Reporting periods

6. Dollar rounding ?
7. In order by sales volume ?
8. Minimum sales volume level
9. Number of services to print
10. Brief format ?
<F2> = "First"
```

### 1. Starting customer and

### 2. Ending customer

Enter the range of customers to print on the report, or press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field.

### 3. Starting service and

### 4. Ending service

Enter the range of services to print on the report, or press <F2> for *First* and *Last*.

Format	Three characters
Example	Press <F2> at each field.

### 5. Reporting periods

Enter from one to four reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. Dollar rounding?

Format	One character, Y or N
Example	Type: N

### 7. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as not applicable. If you answer Y, services are printed in descending order of sales volume for each customer.

The sales volume used is that from the first reporting period only.

### 8. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only services with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>

### 9. Number of services to print

Enter the number of services you wish to print for each customer, or press <F5> to print *All* services.

Format	9999
Example	Press <F5>

### 10. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

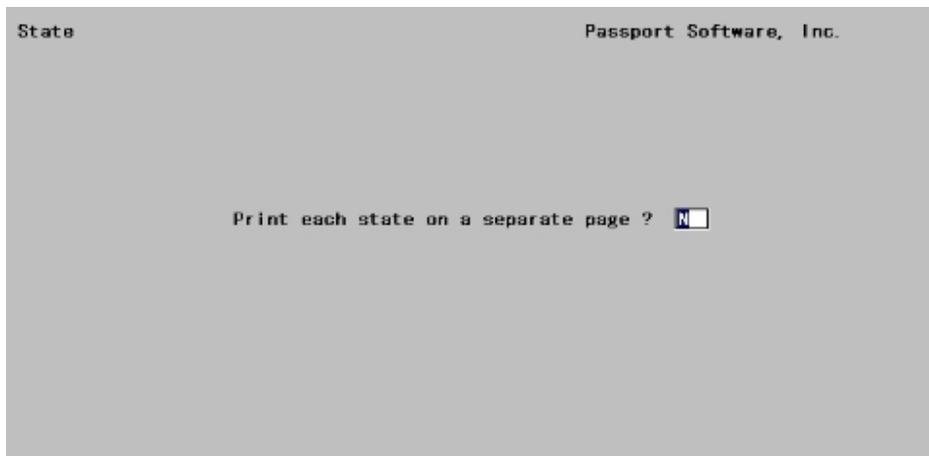
## STATE

The *Fast Analysis by State* report shows sales, cost of sales, and profit figures for period-to-date, year-to-date, and last year for each customer, with the customers ordered by state. A summary of individual state totals is printed at the end of the report.

See a sample [Fast Analysis by State](#) report in the *Sample Reports* appendix.

### Select

*State* from the *Fast Analysis Reports* menu.



State Passport Software, Inc.

Print each state on a separate page ?

Answer Y or N to print each state on a separate page. No other report entry parameters are required for this report.

## ZIP CODE

The *Fast Analysis by Zip code* report shows sales, cost of sales, and profit figures for period-to-date, year-to-date, and last year for each customer, with the customers ordered by ZIP code. A summary of individual ZIP code totals is printed at the end of the report.

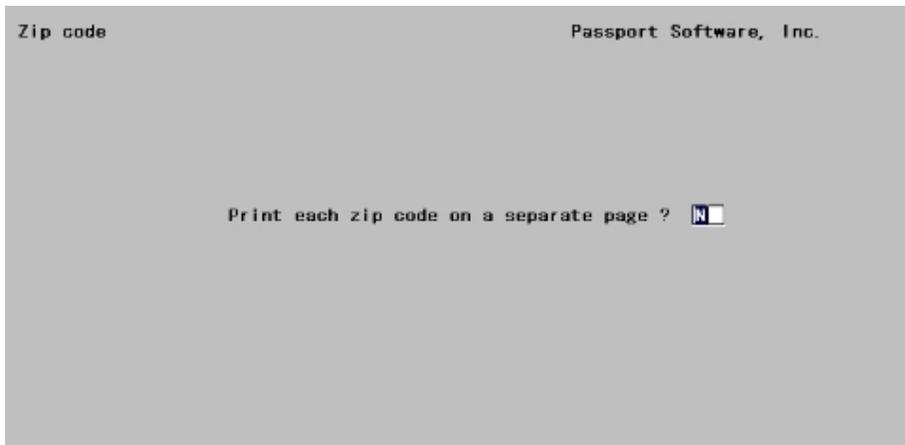
See a sample [Fast Analysis by ZIP Code](#) report in the *Sample Reports* appendix.

### **Note**

Only the first five characters of the ZIP code field are used, and they are treated as alphanumeric characters. You can, therefore, enter various non-numeric postal codes for your customers in countries outside the United States, in addition to using the standard numeric ZIP codes for U.S. customers.

### **Select**

*Zip code* from the *Fast Analysis Reports* menu.



The screenshot shows a report entry screen with a grey background. At the top left, it says "Zip code" and at the top right, "Passport Software, Inc.". In the center, there is a question: "Print each zip code on a separate page ?" followed by a small box containing the letter "N".

Answer Y or N to print each ZIP code on a separate page. No other report entry parameters are required for this report.

# POS Sales Analysis

This chapter contains the following topics:

<a href="#">Introduction to POS Sales Analysis</a> .....
<a href="#">Selecting POS Sales Analysis Reports</a> .....
<a href="#">Customers for an Item</a> .....
<a href="#">Customers for a Service</a> .....
<a href="#">Items for a Customer</a> .....
<a href="#">Sales Rep, Actual</a> .....
<a href="#">Services for a Customer</a> .....

## INTRODUCTION TO POS SALES ANALYSIS

POS Sales Analysis reports provide a convenient way to produce simplified Sales Analysis reports from Point of Sale history transactions. Parameter entry is kept to a minimum to decrease the complexity of setting up and generating meaningful reports.

These reports are patterned after the Fast analysis reports that access the A/R history.

### Reports

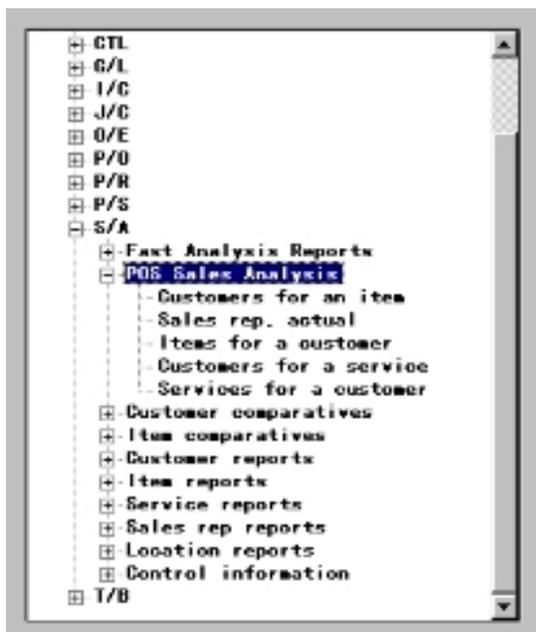
The following reports are available from the *POS Sales Analysis* menu:

- Customers for an item
- Customers for a service
- Items for a customer
- Sales rep, actual
- Services for a customer

## SELECTING POS SALES ANALYSIS REPORTS

### Select

*POS Sales Analysis* from the Sales Analysis menu.



## CUSTOMERS FOR AN ITEM

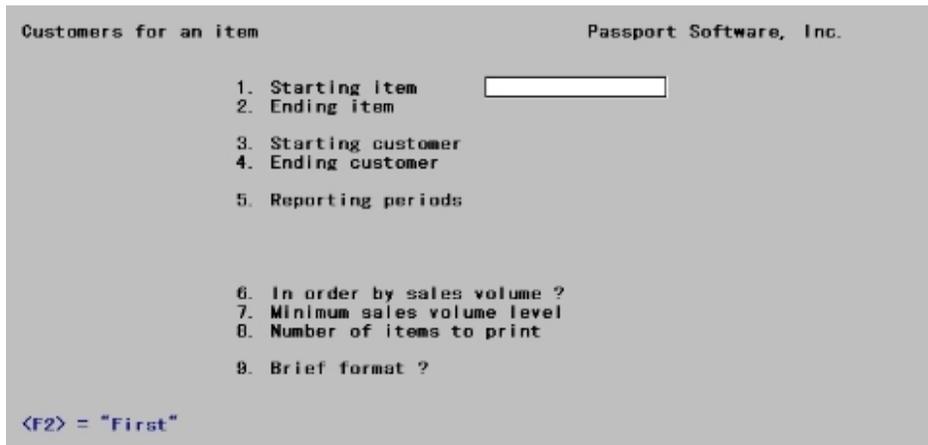
The *POS Sales Analysis Customers for an item* report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percent for a selected range of items and the customers those items were sold to, within four possible reporting periods.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume based on sales in the first selected reporting period.

### Select

*Customers for an item* from the *POS Sales Analysis* menu.



### 1. Starting item and

### 2. Ending item

Enter the range of items to print on the report, or press <F2> for *First* and *Last*.

Format	15 characters
Example	Press <F2> at each field

### 3. Starting customer and

### 4. Ending customer

Enter the range of customers to print on the report, or press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field.

### 5. Reporting periods

Enter from 1 to 4 reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as not applicable.

### 7. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>.

### 8. # customers to print

Enter the number of customers you wish to print for each item, press <F5> to print *All* customers.

Format	9999
Example	Press <F5>.

### 9. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

### 10. Warehouse

You are asked for this information if you use multi-warehousing in I/C. Enter a warehouse press <F5> for *All* warehouses.

Format	Two characters
Example	Press <F5>.

## CUSTOMERS FOR A SERVICE

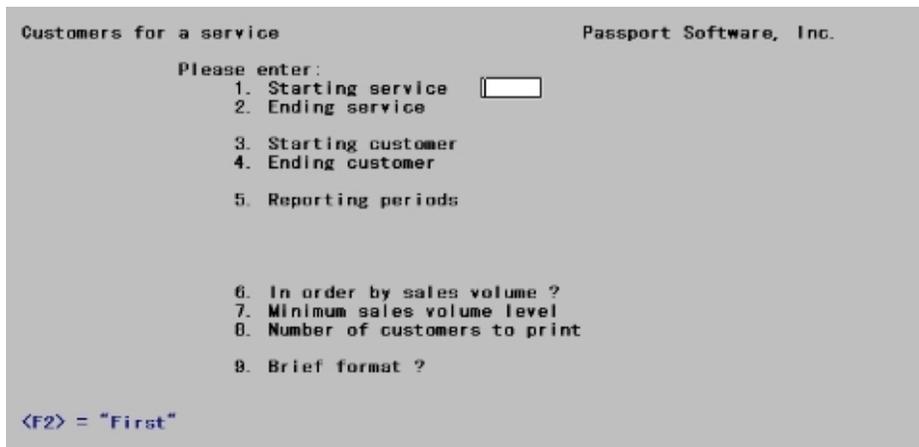
The *POS Sales Analysis Customers for a Service* report shows quantity sold, sales amount, percent of sales, cost of sales, profit, percent of profit, and margin percent for a selected range of services and the customers those services were sold to, within four possible reporting periods.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume based on sales in the first selected reporting period.

### Select

*Customers for a service* from the *POS Sales Analysis Reports* menu.



### 1. Starting service and

### 2. Ending service

Enter the range of services to print on the report, press <F2> for *First* and *Last*.

Format	Three characters
Example	Press <F2> at each field

### 3. Starting customer and

### 4. Ending customer

Enter the range of customers to print on the report, press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field

### 5. Reporting periods

Enter from 1 to 4 reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display Not Applicable.

### 7. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>.

### 8. # customers to print

Enter the number of customers you wish to print for each service, press <F5> to print *All* customers.

Format	9999
Example	Press <F5>.

### 9. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

You may also use one of the options:

<F5>	for <i>All</i> warehouses.
Enter	For Central warehouse

Format	Two characters
Example	Press <F5>.

## ITEMS FOR A CUSTOMER

The *POS Sales Analysis Items for a Customer* report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percent for a selected range of customers and the items sold to these customers, within selected reporting periods. Percentages are based on sales and profits within selected reporting ranges.

You can print this report in order by sales volume based on sales in the first selected reporting period.

### Select

*Items for a customer* from the *POS Sales Analysis Reports* menu.

```

Items for a customer                                Passport Software, Inc.

      1. Starting customer  
      2. Ending customer
      3. Starting item
      4. Ending item
      5. Reporting periods

      6. Dollar rounding ?
      7. In order by sales volume ?
      8. Minimum sales volume level
      9. Number of items to print
      10. Brief format ?

<F2> = "First"
    
```

### 1. Starting customer

### 2. Ending customer

Enter the range of customers to print on the report, or press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field.

### 3. Starting item and

### 4. Ending item

Enter the range of items to print on the report, or press <F2> for *First* and *Last*.

Format	15 characters
Example	Press <F2> at each field.

### 5. Reporting periods

Enter from one to four reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. Dollar rounding?

Format	One character, Y or N
Example	Type: N

### 7. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as *(Not applicable)*.

### 8. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>.

### 9. Number of items to print

Enter the number of items you wish to print for each customer, or press <F5> to print *All* items.

Format	9999
Example	Press <F5>.

### 10. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type:N
---------	--------

## SALES REP, ACTUAL

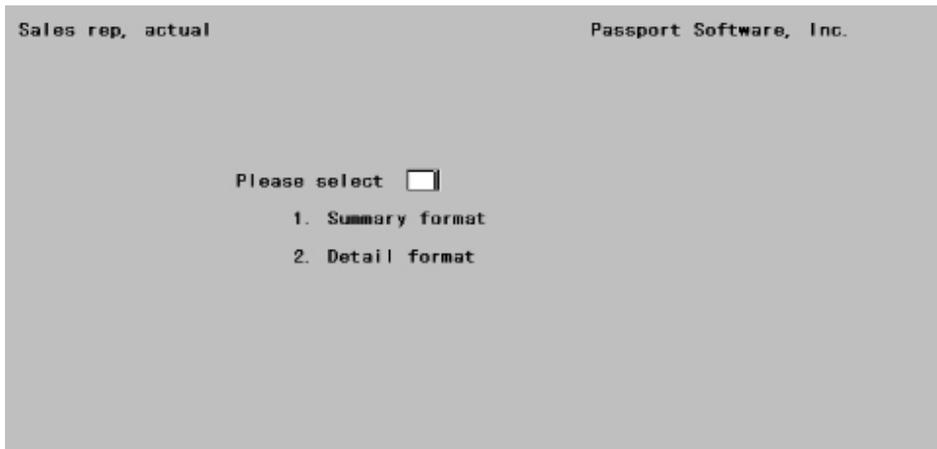
The *POS Sales Analysis Sales Rep, Actual* report shows information about the actual sales made by a sales rep, versus the responsible sales made by a sales rep. A sales rep is responsible for a customer because the customer is assigned to him when you set up Customers.

The summary report prints period-to-date and year-to-date summary information for each sales rep.

The detail report, which you can sort by decreasing sales volume, shows the sales, cost of sales, profits, and margins for a specified number of customers for each sales rep.

### Select

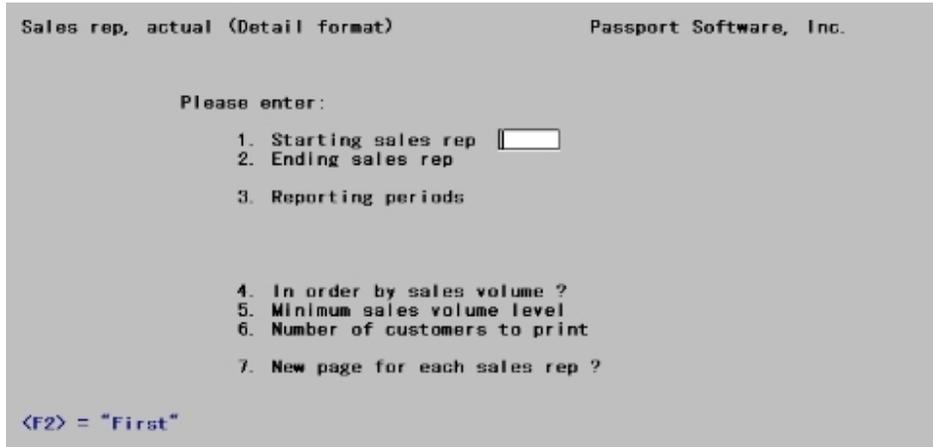
*Sales rep, actual* from the *POS Sales Analysis Reports* menu.



Select 1 for summary format or 2 for detail format. If you select summary format, no other entry parameters are required.

Example

Select 2 for detail report



**1. Starting sales rep and**

**2. Ending sales rep**

Enter the range of sales reps to print on the report, or press <F2> for *First* and *Last*.

Format	Three characters
Example	Press <F2> at each field

**3. Reporting periods**

Enter from 1 to 4 reporting periods.

Format	MMDDYY for each field
Example	Type:10119, then type 33119

**4. In order by sales volume?**

Format	One character, Y or N
Example	Type:Y

If you answer N, the next two fields display as not applicable.

**5. Minimum sales volume level**

Enter a minimum sales volume level or press <F7> for None.

If you enter a sales volume level, only customers with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>.

**6. Number of customers to print**

Enter the number of customers you wish to print for each sales rep, or press <F5> to print *All* customers.

Format	9999
Example	Press <F5>.

**7. New page for each sales rep?**

Answer Y to start each new sales rep on a new page.

Format	One character, Y or N
Example	Type: N

## SERVICES FOR A CUSTOMER

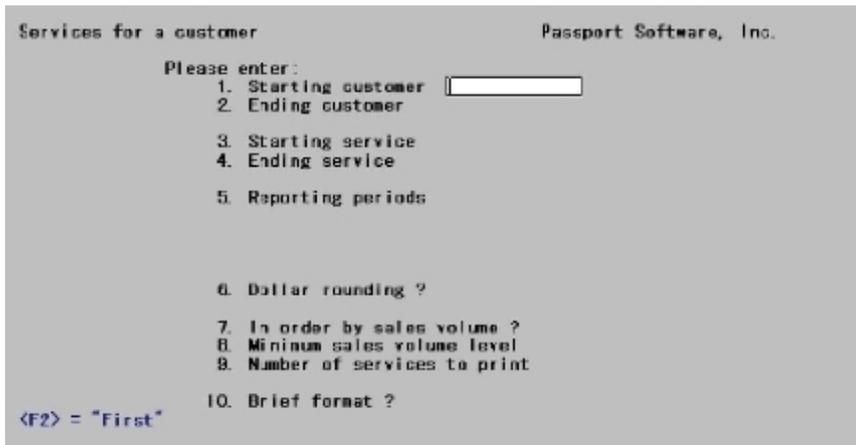
The *POS Sales Analysis Services for a Customer* report shows quantity sold, sales, percent of sales, cost of sales, profit, and margin percent for a selected range of customers, and the services sold to these customers, within four possible reporting periods.

Percentages are based on sales and profits within the selected reporting period.

You can print this report in order by sales volume based on sales in the first selected reporting period.

### Select

*Services for a Customer* from the *POS Sales Analysis Reports* menu.



### 1. Starting customer and

### 2. Ending customer

Enter the range of customers to print on the report, or press <F2> for *First* and *Last*.

Format	12 characters
Example	Press <F2> at each field.

### 3. Starting service and

### 4. Ending service

Enter the range of services to print on the report, or press <F2> for *First* and *Last*.

Format	Three characters
Example	Press <F2> at each field.

### 5. Reporting periods

Enter from one to four reporting periods.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### 6. Dollar rounding?

Format	One character, Y or N
Example	Type: N

### 7. In order by sales volume?

Format	One character, Y or N
Example	Type: Y

If you answer N, the next two fields display as not applicable. If you answer Y, services are printed in descending order of sales volume for each customer.

The sales volume used is that from the first reporting period only.

### 8. Minimum sales volume level

Enter a minimum sales volume level or press <F7> for *None*.

If you enter a sales volume level, only services with a sales volume equal to or greater than this level will be shown on the report.

Format	Up to 12 digits
Example	Press <F7>.

### 9. Number of services to print

Enter the number of services you wish to print for each customer, or press <F5> to print *All* services.

Format	9999
Example	Press <F5>.

### 10. Brief format?

Answer Y or N. You will not be asked this question if you entered more than one reporting period above.

Example	Type: N
---------	---------

Answer Y or N to print each ZIP code on a separate page. No other report entry parameters are required for this report.

# Enhanced Sales Analysis

This chapter contains the following topics:

<a href="#">Introduction to Enhanced Sales Analysis</a> .....
<a href="#">Customer Detail</a> .....
<a href="#">Item Detail</a> .....
<a href="#">Item by Customer</a> .....
<a href="#">Item by Sales Rep</a> .....
<a href="#">Customer by Item</a> .....

## INTRODUCTION TO ENHANCED SALES ANALYSIS

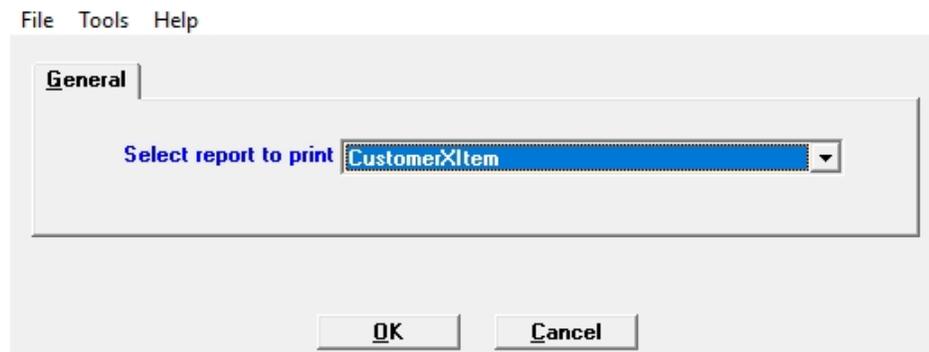
Enhanced Sales Analysis reports provide data only when using PBS SQL. They allow you to view the report data in a more graphical format. When a report is run the program launches Internet Explorer or your default browser to display the data.

Once the report data displays in Internet Explorer, additional options become available. These include:

- Switching to other pages of the report.
- Change the viewing size.
- Find text in the report.
- Move the report data and format to PDF, Excel or Word. You may alter and save your data in one of those formats.
- Re-enter any report criteria and refresh the report data.
- Print the report

## Reports

Select a report from this screen:



### Select report to print

The following reports are available:

- CustomerDetail - See [Customer Detail](#)
- ItemDetail - See [Item Detail](#)
- ItemXCustomer - See [Item by Customer](#)  
Accesses the Item x Customer, Vendor X Customer and Product Category X Customer report formats.
- ItemXSalesRep - See [Item by Sales Rep](#)  
Accesses the Item x Sales Rep, Vendor x Sales Rep and Product Category x Sales Rep report formats.

- CustomerXItem - See [Customer by Item](#)  
Accesses the Customer X Item, Customer X Vendor and Customer X Product Category report formats.

**OK or Cancel**

Select OK to display the next screen or Cancel to return to the S/A menu.

## CUSTOMER DETAIL

### Select

*CustomerDetail* from the Enhanced Sales Analysis main screen.

The following screen displays:

The screenshot shows a software dialog box titled "Customer Detail" with a menu bar (File, Tools, Help) and a "General" tab. The "Report criteria" section contains various input fields and dropdown menus. On the left, there are fields for "By cust number or name" (set to "Number"), "Starting customer number" ("First"), "Ending customer number" ("Last"), "By vendor", "Starting vendor #", "Ending vendor #", "Print by item", "Starting item #", "Ending item #", "For which inventory account", "Report format", "Print order" (set to "Customer Number"), "Starting customer type" ("First"), and "Ending customer type" ("Last"). On the right, there are fields for "Starting product category", "Ending product category", "Starting product sub-category", "Ending product sub-category", "Starting state" ("First"), "Ending state" ("Last"), "Starting zip code" ("First"), "Ending zip code" ("Last"), "Starting sales rep" ("First"), "Ending sales rep" ("Last"), "Starting period A date" ("Earliest"), "Ending period A date" ("Latest"), "Starting period B date", "Ending period B date", "Starting period C date", and "Ending period C date". At the bottom are "OK" and "Cancel" buttons.

Enter the following fields:

### By cust number or name

For the customer range select either Number or Name.

Format	Drop down list
Example	Select Number

### Starting customer number or Starting customer name

Enter the starting customer name or number you wish to include. The customer name does not need be on file. You may select <F2> for the first customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the starting field for <i>First</i> .

### Ending customer number or Ending customer name

Enter the ending customer name or number you wish to include. The customer name does not need be in the table. You may select <F2> for the last customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the ending field for <i>Last</i> .

### Print order

You may select one of the print orders:

Selection	Description
Customer Number	By customer number.
Customer Type	By customer type.
Sales Rep	By sales representative.
State /Province	By state or province.
Gross Sales (Total)	By the total gross sales.
Gross Profit (Total)	By the total gross profit.

### Starting customer type and Ending customer type

For both the starting and ending fields enter the customer type. You may use the <F2> key for the "First" and "Last" customer types.

Format	Five characters
Example	Press <F2> for both fields.

### Starting state and Ending state

For both the starting and ending fields enter the state. You may use the <F2> key for the "First" and "Last" states.

Format	23 characters
Example	Press <F2> for both fields.

### Starting zip code and End zip code

For both the starting and ending fields enter the zip code. You may use the <F2> key for the "First" and "Last" zip codes.

Format	15 characters
Example	Press <F2> for both fields.

### Starting sales rep and Ending sales rep

For both the starting and ending fields enter the sales rep. You may use the <F2> key for the "First" and "Last" sales reps. You may also click on the binoculars and select a sales rep from a list.

## Periods

### Starting period A, B, or C date and Ending period A, B or C date

Enter from one to three reporting periods. You may select a date by clicking on the calendar lookup. After entering a specific date range for starting and ending period A then the starting and ending period B fields become available.

Format	Up to three reporting periods, each represented as a range of dates in the format MMDDYY through MMDDYY.
Example	Enter 10119 through 33119 on the first line. Press <Enter> from the first field of the next line # to terminate entry.

### OK or Cancel

Select OK to generate the SQL report.

You may select Cancel to return to the previous screen. The SQL report will not be generated.

## ITEM DETAIL

### Select

*ItemXCustomer* from the Enhanced Sales Analysis main screen.

The following screen displays:

File Tools Help

**General**

**Report criteria**

By cust number or name

Starting customer name

Ending customer name

By vendor **Number**

Starting vendor # **"First"**

Ending vendor # **"Last"**

Print by item **Number**

Starting item # **"First"**

Ending item # **"Last"**

For which inventory account **"All"**

Report format

Print order **Item Number**

Starting customer type

Ending customer type

Starting product category **"First"**

Ending product category **"Last"**

Starting product sub-category **"First"**

Ending product sub-category **"Last"**

Starting state

Ending state

Starting zip code

Ending zip code

Starting sales rep

Ending sales rep

Starting period A date **"Earliest"**

Ending period A date **"Latest"**

Starting period B date

Ending period B date

Starting period C date

Ending period C date

Capture screen OK Cancel

Enter the following fields:

### By vendor

Select either Vendor Number or Name.

Format	Drop down list
Example	Select Number

### Starting vendor and Ending vendor

Depending on what you selected in the previous field you must either enter the vendor number or name range.

Enter the starting and ending vendor you wish to include. The vendor does not need be in the table. You may select <F2> for the "First" vendor and <F2> for the "Last" vendor in the table. You may also click on the binoculars and select a vendor from a list.

Format	6 characters if by number and 50 characters if by name
Example	Press <F2> at the ending field for <i>Last</i> .

### Print by item

Enter either by item *Number or Description*. When selecting Description the program uses item description 1.

Format	Drop down list
Example	Select Number

### Starting item and Ending item

Depending on what you selected in the previous field, the range is either by item number or item description.

Enter the range of items to print on the report, or enter <F2> for "First" and "Last" items. You may use the calendar lookup to select both a starting and ending item.

Format	Your standard item number format as determined in Inventory Control.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### For which inventory account

Enter the inventory account number or use <F5> which selects "All" accounts. You may click on the calendar lookup to select a specific account.

Format	Your standard account number format, in segments, as defined in Company information.
Example	Press <F5>

### Print order

You may select one of the print orders:

Selection	Description
Item Number	By item number.
Category	By item category.
Vendor Number	By vendor number.
Gross Sales (Total)	By the total gross sales.
Gross Profit (Total)	By the total gross profit.

### Starting and Ending Product category

Enter the range of item categories to print on the report or enter >F2> for "First" and "Last" item categories. You may use the calendar lookup to select both a starting and ending item category.

Format	Five characters.
Example	Press <F2> at each field for "First" through "Last".

### Starting and Ending product sub-category

Enter the range of item sub-categories to print on the report or enter >F2> for "First" and "Last" item sub-categories. You may use the calendar lookup to select both a starting and ending item sub-category.

Format	Five characters.
Example	Press <F2> at each field for "First" through "Last".

### Starting period A date and ending period A date

Enter a reporting period range.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### OK or Cancel

Select OK to generate the SQL report.

You may select Cancel to return to the previous screen. The SQL report will not be generated.

## ITEM BY CUSTOMER

### Select

*ItemXCustomer* from the Enhanced Sales Analysis main screen.

The following screen displays:

The screenshot shows a software dialog box titled "General" with a "Report criteria" section. The "By cust number or name" dropdown is set to "Number". Other fields include "Starting customer number" (set to "First"), "Ending customer number" (set to "Last"), "By vendor" (set to "Number"), "Starting vendor #" (set to "First"), "Ending vendor #" (set to "Last"), "Print by item" (set to "Number"), "Starting item #" (set to "First"), "Ending item #" (set to "Last"), "For which inventory account" (empty), "Report format" (set to "Item x Customer"), "Print order" (empty), "Starting customer type" (empty), "Ending customer type" (empty), "Starting product category" (set to "First"), "Ending product category" (set to "Last"), "Starting product sub-category" (set to "First"), "Ending product sub-category" (set to "Last"), "Starting state" (empty), "Ending state" (empty), "Starting zip code" (empty), "Ending zip code" (empty), "Starting sales rep" (empty), "Ending sales rep" (empty), "Starting invoice date" (set to "Earliest"), "Ending invoice date" (set to "Latest"), "Starting period B date" (empty), "Ending period B date" (empty), "Starting period C date" (empty), and "Ending period C date" (empty). At the bottom are "OK" and "Cancel" buttons.

Entering the following fields:

### By cust number or name

For the customer range select either Number or Name.

Format	Drop down list
Example	Select Number

### Starting customer number or Starting customer name

Enter the starting customer name or number you wish to include. The customer name does not need be in the table. You may select <F2> for the first customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the starting field for "First".

### Ending customer number or Ending customer name

Enter the ending customer name you wish to include. The customer name does not need be in the table. You may select <F2> for the last customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the ending field for "Last".

### By vendor

Select either the vendor *Number* or *Name*.

Format	Drop down list
Example	Select Number

### Starting vendor and Ending vendor

Depending on what you selected in the previous field you must either enter the vendor number range or vendor name range.

Enter the starting and ending vendor you wish to include. The vendor name does not need be in the table. You may select <F2> for the "First" vendor and <F2> for the "Last" vendor in the table. You may also click on the binoculars and select a vendor from a list.

Format	6 characters if by number and 50 characters if by name.
Example	Press <F2> at the ending field for <i>Last</i> .

### Print by item

Enter either by item *Number* or *Description*. When selecting Description the program uses item description 1.

Format	Drop down list
Example	Select Number

### Starting item and Ending item

Depending on what you selected in the previous field, the range is either by item number or item description.

Enter the range of items to print on the report, or enter <F2> for "First" and "Last" items. You may use the calendar lookup to select both a starting and ending item.

Format	Your standard item number format as determined in Inventory Control.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## Report format

You may select one of the print formats:

Selection	Description
Item x Customer	Prints the item and displays all the customers who purchased that item.
Vendor x Customer	Prints the vendor and displays the customers who bought items supplied by the vendor.
Product Category x Customer	Prints an item product category and prints all the customers who purchased items in that category and sub-category.

## Starting and Ending Product category

Enter the range of item categories to print on the report or enter >F2> for "First" and "Last" item categories. You may use the calendar lookup to select both a starting and ending item category.

Format	Five characters.
Example	Press <F2> at each field for "First" through "Last".

## Starting and Ending product sub-category

Enter the range of item sub-categories to print on the report or enter >F2> for "First" and "Last" item sub-categories. You may use the calendar lookup to select both a starting and ending item sub-category.

Format	Five characters.
Example	Press <F2> at each field for "First" through "Last".

## Starting invoice date and Ending invoice date

Enter a reporting invoice date range. The report does not include invoice dates.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

## OK or Cancel

Select OK to generate the SQL report.

You may select Cancel to return to the previous screen. The SQL report will not be generated.

## ITEM BY SALES REP

### Select

*ItemXSalesRep* from the Enhanced Sales Analysis main screen.

The following screen display:

File Tools Help

General

Report criteria

By cust number or name Number

Starting customer number "First"

Ending customer number "Last"

By vendor Number

Starting vendor # "First"

Ending vendor # "Last"

Print by item Number

Starting item # "First"

Ending item # "Last"

For which inventory account

Report format Item x Sales Rep

Print order

Starting customer type

Ending customer type

Starting product category "First"

Ending product category "Last"

Starting product sub-category "First"

Ending product sub-category "Last"

Starting state

Ending state

Starting zip code

Ending zip code

Starting sales rep "First"

Ending sales rep "Last"

Starting invoice date "Earliest"

Ending invoice date "Latest"

Starting period B date

Ending period B date

Starting period C date

Ending period C date

OK Cancel

Enter the following fields:

### By cust number or name

For the customer range select either Number or Name.

Format	Drop down list
Example	Select Number

### Starting customer number or Starting customer name

Enter the starting customer name or number you wish to include. The customer name does not need be on file. You may select <F2> for the first customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the starting field for <i>First</i> .

### Ending customer number or Ending customer name

Enter the ending customer name or number you wish to include. The customer name does not need be in the table. You may select <F2> for the last customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the ending field for <i>Last</i> .

### By vendor

Select either Vendor Number or Name.

Format	Drop down list
Example	Select Number

### Starting vendor and Ending vendor

Depending on what you selected in the previous field you must either enter the vendor number or name range.

Enter the starting and ending vendor you wish to include. The vendor does not need be in the table. You may select <F2> for the "First" vendor and <F2> for the "Last" vendor in the table. You may also click on the binoculars and select a vendor from a list.

Format	6 characters if by number and 50 characters if by name
Example	Press <F2> at the ending field for <i>Last</i> .

### Print by item

Enter either by item *Number or Description*. When selecting Description the program uses item description 1.

Format	Drop down list
Example	Select Number

### Starting item and Ending item

Depending on what you selected in the previous field, the range is either by item number or item description.

Enter the range of items to print on the report, or enter <F2> for "First" and "Last" items. You may use the calendar lookup to select both a starting and ending item.

Format	Your standard item number format as determined in Inventory Control.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

## Report format

You may select one of the print formats:

Selection	Description
Item x Sales rep	Prints the item and displays all the sales representatives who sold that item.
Vendor x Sales rep	Prints the vendor and displays the sales reps who sold items supplied by the vendor.
Product Category x Sales Rep	Prints an item product category and prints all the sales reps who sold items in that category.

## Starting and Ending Product category

Enter the range of item categories to print on the report or enter >F2> for "First" and "Last" item categories. You may use the calendar lookup to select both a starting and ending item category.

Format	Five characters.
Example	Press <F2> at each field for "First" through "Last".

## Starting and Ending product sub-category

Enter the range of item sub-categories to print on the report or enter >F2> for "First" and "Last" item sub-categories. You may use the calendar lookup to select both a starting and ending item sub-category.

Format	Five characters.
Example	Press <F2> at each field for "First" through "Last".

## Starting sales rep and Ending sales rep

## Starting invoice date and Ending invoice date

Enter a reporting invoice date range. The report does not include invoice dates.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

## Ok or Cancel

Select OK to generate the SQL report.

You may select Cancel to return to the previous screen. The SQL report will not be generated.

## CUSTOMER BY ITEM

You may print the data by three different formats:

Customer x item	Prints the customer types and the item categories for each customer type
Customer x Item	Prints the customer type and displays the vendors who supplied items supplied by that type.
Customer x Product Category	Prints the customer types and the product categories for those customer types.

### Select

*CustomerXItem* from the Enhanced Sales Analysis main screen.

The following screen display:

File Tools Help

General

Report criteria

By cust number or name

Starting customer number

Ending customer number

By vendor

Starting vendor #

Ending vendor #

Print by item

Starting item #

Ending item #

For which inventory account

Report format

Print order

Starting customer type

Ending customer type

Starting product category

Ending product category

Starting product sub-category

Ending product sub-category

Starting state

Ending state

Starting zip code

Ending zip code

Starting sales rep

Ending sales rep

Starting invoice date

Ending invoice date

Starting period B date

Ending period B date

Starting period C date

Ending period C date

OK Cancel

Enter the following fields:

### By customer number or name

For the customer range select either Number or Name.

Format	Drop down list
Example	Select Number

### Starting customer number or Starting customer name

Enter the starting customer name or number you wish to include. The customer name does not need be on file. You may select <F2> for the first customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the starting field for <i>First</i> .

### Ending customer number or Ending customer name

Enter the ending customer name or number you wish to include. The customer name does not need be in the table. You may select <F2> for the last customer. You may also click on the binoculars and select a customer from a list.

Format	12 characters for number and 50 characters for name
Example	Press <F2> at the ending field for <i>Last</i> .

### By vendor

Select either Vendor Number or Name.

Format	Drop down list
Example	Select Number

### Starting vendor and Ending vendor

Depending on what you selected in the previous field you must either enter the vendor number or name range.

Enter the starting and ending vendor you wish to include. The vendor does not need be in the table. You may select <F2> for the "First" vendor and <F2> for the "Last" vendor in the table. You may also click on the binoculars and select a vendor from a list.

Format	6 characters if by number and 50 characters if by name
Example	Press <F2> at the ending field for <i>Last</i> .

### Print by item

Enter either by item *Number or Description*. When selecting Description the program uses item description 1.

Format	Drop down list
Example	Select Number

### Starting item and Ending item

Depending on what you selected in the previous field, the range is either by item number or item description.

Enter the range of items to print on the report, or enter <F2> for "First" and "Last" items. You may use the calendar lookup to select both a starting and ending item.

Format	Your standard item number format as determined in Inventory Control.
Example	Press <F2> at each field for <i>First</i> through <i>Last</i> .

### Report format

You may select one of the print formats:

Customer x item	Prints the customer types and the item categories for each customer type.
Customer x Item	Prints the customer type and displays the vendors who supplied items supplied by that type.
Customer x Product Category	Prints the customer types and the product categories for those customer types.

### Starting customer type and Ending customer type

For both the starting and ending fields enter the customer type. You may use the <F2> key for the "First" and "Last" customer types.

Format	Five characters
Example	Press <F2> for both fields.

### Starting and Ending Product category

Enter the range of item categories to print on the report or enter >F2> for "First" and "Last" item categories. You may use the calendar lookup to select both a starting and ending item category.

Format	Five characters.
Example	Press <F2> at each field for " <i>First</i> " through " <i>Last</i> ".

### Starting and Ending product sub-category

Enter the range of item sub-categories to print on the report or enter >F2> for "First" and "Last" item sub-categories. You may use the calendar lookup to select both a starting and ending item sub-category.

Format	Five characters.
Example	Press <F2> at each field for " <i>First</i> " through " <i>Last</i> ".

### Starting invoice date and Ending invoice date

Enter a reporting invoice date range. The report does not include invoice dates.

Format	MMDDYY for each field
Example	Type: 10119, then type 33119

### Ok or Cancel

Select OK to generate the SQL report.

You may select Cancel to return to the previous screen. The SQL report will not be generated.

# Sample Reports

This appendix contains Sales Analysis sample reports.

# SALES ANALYSIS BY CUSTOMER

Date 06/06/1999 Time 07:59:06

XYZ Company

Report #0209 Page 0001

S A L E S   A N A L Y S I S   B Y   C U S T O M E R

Customer number range: "First" thru "Last" Sales rep: "All" State: "All"  
 Includes customers with zero \$ sales Sales Territory: "All"

Customer #	Type SIC	Customer name/Address	Sls-rep Terr	Period-to-date	Year-to-date	Last year
*401	RET	Miscellaneous customer	15A	Sales : 0.00	0.00	0.00
1	WSL	Elliot Enterprises Glendale, CA 94994 USA	1	Sales : 292.00	292.00	0.00
10	RET	Harris, Goldberg & Jones San Diego, CA 92100 USA	1	Sales : 276.40	276.40	0.00
30	WSL	W.J. Bjornfreg A/G Los Angeles, CA 92100	20	Sales : 163.00	163.00	0.00
40	RET	Washington, Mrs. Thomas Dallas, TX 75201 USA	1	Sales : 955.00	955.00	0.00
50	RET	Space Concepts & Design New York, NY 10052 USA	789	Sales : 235.00	235.00	0.00
99	RET	Anthony Jones, Inc. Alberta, CA 12345 USA	1	Sales : 556.00	556.00	0.00
100	WSL	Neptune Underwater Supply Santa Marina, CA 91100 USA	23	Sales : 560.25	560.25	0.00
200	RET	21st Century Enterprises San Francisco, CA 95782 USA	10	Sales : 575.70	575.70	0.00
300	RET	Beverly Beauty Supply Los Angeles, CA 90005 USA	23	Sales : 132.95	132.95	0.00
600	RET	Ariel Enterprises Los Angeles, CA 90005 USA	23	Sales : 525.00	525.00	0.00
C123	CASH	Peter Cash Portland, OR 98765-4321 USA	1	Sales : 0.00	0.00	0.00

Date 06/06/1999 Time 07:59:06

XYZ Company

Report #0209 Page 0002

S A L E S   A N A L Y S I S   B Y   C U S T O M E R

Customer number range: "First" thru "Last" Sales rep: "All" State: "All"  
 Includes customers with zero \$ sales Sales Territory: "All"

S U M M A R Y				Period-to-date	Year-to-date	Last year
12 customers	--	Sales	:	4,271.30	4,271.30	0.00

-- End of report --

# SALES ANALYSIS BY CUSTOMER SALES VOLUME

Date 06/06/1999 Time 08:24:08

XYZ Company

Report #0211 Page 0001

S A L E S   A N A L Y S I S   B Y   C U S T O M E R   S A L E S   V O L U M E

Customer number range: "First" thru "Last" State: "All" Sales territory: "All"  
 Sales rep: "All" # of customers: "All" Customer type: "All"  
 Includes customers with zero \$ sales Sort by volume, customer #

Customer #	Sls-rep	Customer name/Address Contact/phone number	SIC	Terr Cus-typ	Period-to-date Period-to-date	Year-to-date Year-to-date	Last year Last year
40	001	Washington, Mrs. Thomas Dallas, TX 75201 USA Ann Washington 617-444-7780		RET	Sales : 955.00	955.00	0.00
200	010	21st Century Enterprises San Francisco, CA 95782 Lou Mandel 415-555-7844	USA	RET	Sales : 575.70	575.70	0.00
100	023	Neptune Underwater Supply Santa Marina, CA 91100 Sam Johnson 408-776-1102	USA	WSL	Sales : 560.25	560.25	0.00
99	001	Anthony Jones, Inc. Alberta, CA 12345 T.A. Wagner 123-456-7890	USA	RET	Sales : 556.00	556.00	0.00
600	023	Ariel Enterprises Los Angeles, CA 90005 M.J. Thorpe 213-554-4300	USA	RET	Sales : 525.00	525.00	0.00
1	001	Elliot Enterprises Glendale, CA 94994 Paul Elliot 213-779-6010	USA	WSL	Sales : 292.00	292.00	0.00
10	001	Harris, Goldberg & Jones San Diego, CA 92100 Michael Jones 714-221-8500	USA	RET	Sales : 276.40	276.40	0.00
50	789	Space Concepts & Design New York, NY 10052 Mike Mallin 212-220-9981	USA	RET	Sales : 235.00	235.00	0.00

Date 06/06/1999 Time 08:24:08

XYZ Company

Report #0211 Page 0002

S A L E S   A N A L Y S I S   B Y   C U S T O M E R   S A L E S   V O L U M E

Customer number range: "First" thru "Last" State: "All" Sales territory: "All"  
 Sales rep: "All" # of customers: "All" Customer type: "All"  
 Includes customers with zero \$ sales Sort by volume, customer #

Customer #	Sls-rep	Customer name/Address Contact/phone number	SIC	Terr Cus-typ	Period-to-date	Year-to-date	Last year
------------	---------	---	-----	-----------------	----------------	--------------	-----------

			Period-to-date	Year-to-date	Last year	
30	020	W.J. Bjornfreg A/G Los Angeles, CA 92100 Mary Kneip 213-886-7722	Sales : WSL	163.00	163.00	0.00
300	023	Beverly Beauty Supply Los Angeles, CA 90005 Angie Peters 213-778-9000	Sales : USA RET	132.95	132.95	0.00
*401	15A	Miscellaneous customer  Scott Fisher 555-777-9100	Sales : RET	0.00	0.00	0.00
C123	001	Peter Cash Portland, OR 98765-4321 USA Peter Cash 123-456-7890	Sales : CASH	0.00	0.00	0.00

Date 06/06/1999 Time 08:24:08 XYZ Company Report #0211 Page 0003

S A L E S A N A L Y S I S B Y C U S T O M E R S A L E S V O L U M E

Customer number range: "First" thru "Last" State: "All" Sales territory: "All"  
 Sales rep: "All" # of customers: "All" Customer type: "All"  
 Includes customers with zero \$ sales Sort by volume, customer #

S U M M A R Y

			Period-to-date	Year-to-date	Last year
Grand totals:		12 Customers Sales :	4,271.30	4,271.30	0.00

-- End of report --

# SALES ANALYSIS BY CUSTOMER TYPE

Date 06/07/1999 Time 13:51:42

XYZ Company

Report #0212 Page 0001

## S A L E S   A N A L Y S I S   B Y   C U S T O M E R   T Y P E

Customer type: "All"

Sales rep: "All"

State: "All"

Sort by: customer type, customer #

# of Customers: "All"

Sales territory: "All"

Includes customers with zero \$ sales

Type	Customer	Customer name/Address	SIC	Sls-rep	Terr	Period-to-date	Year-to-date	Last year
Cus-typ						Period-to-date	Year-to-date	Last year
CASH	C123	Peter Cash Portland, OR 98765-4321 USA		001	Sales	0.00	0.00	0.00
-----								
		1 Customer for CASH Sales				0.00	0.00	0.00
RET	*401	Miscellaneous customer		15A	Sales	0.00	0.00	0.00
-----								
	10	Harris, Goldberg & Jones San Diego, CA 92100 USA		001	Sales	276.40	276.40	0.00
	40	Washington, Mrs. Thomas Dallas, TX 75201 USA		001	Sales	955.00	955.00	0.00
	50	Space Concepts & Design New York, NY 10052 USA		789	Sales	235.00	235.00	0.00
	99	Anthony Jones, Inc. Alberta, CA 12345 USA		001	Sales	556.00	556.00	0.00
	200	21st Century Enterprises San Francisco, CA 95782 USA		010	Sales	575.70	575.70	0.00
	300	Beverly Beauty Supply Los Angeles, CA 90005 USA		023	Sales	132.95	132.95	0.00
	600	Ariel Enterprises Los Angeles, CA 90005 USA		023	Sales	525.00	525.00	0.00
		8 Customers for RET Sales				3,256.05	3,256.05	0.00
WSL	1	Elliot Enterprises Glendale, CA 94994 USA		001	Sales	292.00	292.00	0.00
-----								
	30	W.J. Bjornfreg A/G Los Angeles, CA 92100		020	Sales	163.00	163.00	0.00
	100	Neptune Underwater Supply Santa Marina, CA 91100 USA		023	Sales	560.25	560.25	0.00

Date 06/07/1999 Time 13:51:42

XYZ Company

Report #0212 Page 0002

## S A L E S   A N A L Y S I S   B Y   C U S T O M E R   T Y P E

Customer type: "All"

Sales rep: "All"

State: "All"

Sort by: customer type, customer #

# of Customers: "All"

Sales territory: "All"

Includes customers with zero \$ sales



# SALES ANALYSIS BY CUSTOMERS FOR AN ITEM

Date 06/07/1999 Time 14:02:20

XYZ Company

Report #0213 Page 0001

S A L E S   A N A L Y S I S   B Y   C U S T O M E R S   F O R   A N   I T E M

Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

-----  
 Item number Description Period-1  
 Customer number 1/01/99  
 Customer name/address Type to  
 Rep/Terr 3/31/99  
 -----

1 Drill, 1/4" Power Hand  
 Unit = EACH

1		Qty sold:	5
Elliot Enterprises	WSL	Sales :	245.00
Glendale, CA USA 94994			

40		Qty sold:	0
Washington, Mrs. Thomas	RET	Sales :	0.00
Dallas, TX USA 75201			

99		Qty sold:	4
Anthony Jones, Inc.	RET	Sales :	220.00
Alberta, CA USA 12345			

200		Qty sold:	10
21st Century Enterprises	RET	Sales :	550.00
San Francisco, CA USA 95782			

600		Qty sold:	5
Ariel Enterprises	RET	Sales :	275.00
Los Angeles, CA USA 90005			

5 Customers for 1		Qty sold:	24
		Sales :	1,290.00

2 Hammer, 16 oz. Claw  
 Unit = EACH

30		Qty sold:	2
W.J. Bjornfreg A/G	WSL	Sales :	53.00
Los Angeles, CA 92100			

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XYZ Company

Report #0213 Page 0002

S A L E S   A N A L Y S I S   B Y   C U S T O M E R S   F O R   A N   I T E M

Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

-----  
 Item number Description Period-1  
 -----

Customer number 1/01/99  
 Customer name/address Type to  
 Rep/Terr 3/31/99

2 Hammer, 16 oz. Claw (Cont.)  
 Unit = EACH

600 Qty sold: 5  
 Ariel Enterprises RET Sales : 132.50  
 Los Angeles, CA USA 90005

2 Customers for 2  
 Qty sold: 7  
 Sales : 185.50

3 Wrench, 3/8" Socket Set  
 Unit = EACH

1 Qty sold: 2  
 Elliot Enterprises WSL Sales : 47.00  
 Glendale, CA USA 94994

40 Qty sold: 0  
 Washington, Mrs. Thomas RET Sales : 0.00  
 Dallas, TX USA 75201

50 Qty sold: 10  
 Space Concepts & Design RET Sales : 235.00  
 New York, NY USA 10052

600 Qty sold: 5  
 Ariel Enterprises RET Sales : 117.50  
 Los Angeles, CA USA 90005

4 Customers for 3  
 Qty sold: 17  
 Sales : 399.50

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S A L E S A N A L Y S I S B Y C U S T O M E R S F O R A N I T E M  
 Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

Item number Description Period-1  
 Customer number 1/01/99  
 Customer name/address Type to  
 Rep/Terr 3/31/99

4 Saw, 2hp 7 1/4" Circular  
 Unit = EACH

10 Qty sold: 0  
 Harris, Goldberg & Jones RET Sales : 0.00  
 San Diego, CA USA 92100

40 Qty sold: 5  
 Washington, Mrs. Thomas RET Sales : 280.00  
 Dallas, TX USA 75201

99 Anthony Jones, Inc. RET Qty sold: 6  
 Alberta, CA USA 12345 Sales : 336.00

200 21st Century Enterprises RET Qty sold: 1  
 San Francisco, CA USA 95782 Sales : 56.00

4 Customers for 4 Qty sold: 12  
 Sales : 672.00

5 Chisel, 5 pc Set  
 Unit = EACH

10 Harris, Goldberg & Jones RET Qty sold: 10  
 San Diego, CA USA 92100 Sales : 175.90

300 Beverly Beauty Supply RET Qty sold: 5  
 Los Angeles, CA USA 90005 Sales : 87.95

2 Customers for 5

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XYZ Company

Report #0213 Page 0004

S A L E S A N A L Y S I S B Y C U S T O M E R S F O R A N I T E M

Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

-----  
 Item number Description Period-1  
 Customer number 1/01/99  
 Customer name/address Type to  
 Rep/Terr 3/31/99  
 -----

5 Chisel, 5 pc Set  
 Unit = EACH

Qty sold: 15  
 Sales : 263.85

6 Motor, 2hp Submersible  
 Unit = EACH

40 Washington, Mrs. Thomas RET Qty sold: 5  
 Dallas, TX USA 75201 Sales : 675.00

100 Neptune Underwater Supply WSL Qty sold: 4  
 Santa Marina, CA USA 91100 Sales : 540.00

2 Customers for 6 Qty sold: 9  
 Sales : 1,215.00

7 Gauge, Hi-pressure  
 Unit = EACH

10 Qty sold: 4  
 Harris, Goldberg & Jones RET Sales : 78.00  
 San Diego, CA USA 92100

1 Customers for 7

Qty sold: 4  
 Sales : 78.00

8 1" Steel Bolts  
 Unit = CASE

10 Qty sold: 50  
 Harris, Goldberg & Jones RET Sales : 22.50  
 San Diego, CA USA 92100

Date 06/07/1999 Time 14:02:21

XYZ Company

Report #0213 Page 0005

S A L E S A N A L Y S I S B Y C U S T O M E R S F O R A N I T E M

Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

-----  
 Item number Description Period-1  
 Customer number 1/01/99  
 Customer name/address Type to  
 Rep/Terr 3/31/99  
 -----

8 1" Steel Bolts (Cont.)  
 Unit = CASE

100 Qty sold: 45  
 Neptune Underwater Supply WSL Sales : 20.25  
 Santa Marina, CA USA 91100

300 Qty sold: 100  
 Beverly Beauty Supply RET Sales : 45.00  
 Los Angeles, CA USA 90005

3 Customers for 8

Qty sold: 195  
 Sales : 87.75

1000 Starter Tool Set Kit Item  
 Unit = EACH

30 Qty sold: 1  
 W.J. Bjornfreg A/G WSL Sales : 110.00  
 Los Angeles, CA 92100

1 Customers for 1000

Qty sold: 1  
 Sales : 110.00

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XYZ Company

Report #0213 Page 0006

S A L E S A N A L Y S I S B Y C U S T O M E R S F O R A N I T E M

Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

Item number	S U M M A R Y	Period-1
		1/01/99
		to
		3/31/99
1	Drill, 1/4" Power Hand	
Unit = EACH	Qty sold:	24
5 custs	Sales :	1,290.00
2	Hammer, 16 oz. Claw	
Unit = EACH	Qty sold:	7
2 custs	Sales :	185.50
3	Wrench, 3/8" Socket Set	
Unit = EACH	Qty sold:	17
4 custs	Sales :	399.50
4	Saw, 2hp 7 1/4" Circular	
Unit = EACH	Qty sold:	12
4 custs	Sales :	672.00
5	Chisel, 5 pc Set	
Unit = EACH	Qty sold:	15
2 custs	Sales :	263.85
6	Motor, 2hp Submersible	
Unit = EACH	Qty sold:	9
2 custs	Sales :	1,215.00
7	Gauge, Hi-pressure	
Unit = EACH	Qty sold:	4
1 cust	Sales :	78.00
8	1" Steel Bolts	
Unit = CASE	Qty sold:	195
3 custs	Sales :	87.75

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S A L E S A N A L Y S I S B Y C U S T O M E R S F O R A N I T E M

Items: "First" thru "Last" Sort by item #, customer # Customer type: "All"  
 Customer range: "First" thru "Last" # of Customers: "All" Sls rep: "All" Sls territory: "All"  
 Includes customers with zero \$ sales State: "All" Sequence by

Item number	S U M M A R Y	Period-1
		1/01/99
		to
		3/31/99
1000	Starter Tool Set Kit Item	
Unit = EACH	Qty sold:	1
1 cust	Sales :	110.00

Grand totals:

9 items  
24 customers

---

Qty sold:	284
Sales :	4,301.60

---

-- End of report --

# SALES ANALYSIS BY SIC CODE

Date 06/07/1999 Time 14:14:12

XYZ Company

Report #0214 Page 0001

S A L E S   A N A L Y S I S   B Y   S I C   C O D E

SIC code: "All"

State: "All"

Customer type: "All"

Sales rep: "All"

Sales territory: "All"

Includes customers with zero \$ sales

SIC	Customer #	Customer name/address	Terr	Type	Rep	Period-to-date	Year-to-date	Last year
SIC code						Period-to-date	Year-to-date	Last year
*401		Miscellaneous customer		RET		Sales : 0.00	0.00	0.00
-----				15A				
1		Elliot Enterprises Glendale, CA 94994	USA	WSL	1	Sales : 292.00	292.00	0.00
10		Harris, Goldberg & Jones San Diego, CA 92100	USA	RET	1	Sales : 276.40	276.40	0.00
30		W.J. Bjornfreg A/G Los Angeles, CA 92100		WSL	20	Sales : 163.00	163.00	0.00
40		Washington, Mrs. Thomas Dallas, TX 75201	USA	RET	1	Sales : 955.00	955.00	0.00
50		Space Concepts & Design New York, NY 10052	USA	RET	789	Sales : 235.00	235.00	0.00
300		Beverly Beauty Supply Los Angeles, CA 90005	USA	RET	23	Sales : 132.95	132.95	0.00
600		Ariel Enterprises Los Angeles, CA 90005	USA	RET	23	Sales : 525.00	525.00	0.00
C123		Peter Cash Portland, OR 98765-4321	USA	CASH	1	Sales : 0.00	0.00	0.00
		12 Customers for				Sales : 4,271.30	4,271.30	0.00

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XYZ Company

Report #0214 Page 0002

S A L E S   A N A L Y S I S   B Y   S I C   C O D E

SIC code: "All"

State: "All"

Customer type: "All"

Sales rep: "All"

Sales territory: "All"

Includes customers with zero \$ sales

S U M M A R Y								
SIC code						Period-to-date	Year-to-date	Last year
		12 customers				Sales : 4,271.30	4,271.30	0.00
		100.0% of custs						
Grand totals:								
	1 SIC code	12 customers				Sales : 4,271.30	4,271.30	0.00

-- End of report --

# SALES ANALYSIS BY ITEM

Date 06/07/1999 Time 14:58:22

XYZ Company

Report #0215 Page 0001

S A L E S   A N A L Y S I S   B Y   I T E M

Item number range: 1 thru 2 Warehouse: "All"  
 Sort order: Item # Cat/subcat: "All" / "All"  
 Includes items with zero \$ sales ABC code: "All"

Item number	Description-1	Cat/sub-cat	Sales acct #	Inventory acct #	Price-1	Price-3
Item #	Description-2	Whse Vendor	Expense acct #	ABC-cod Stk-unit	Price-2	Replacement cost
		Period-to-date	Year-to-date		Period-to-date	Year-to-date

1	Drill, 1/4" Power Hand	TOOLS/ELEC	4010-100	1200-000	55.00	51.00
		Cen 100	5070-000	A EACH	53.50	22.50
		Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	3,982.50	3,982.50	Qty sold:	74	74
				Qty rtn :	0	0

Prior period -- \*\* Zero quantity sold and returned for prior periods \*\*

		TOOLS/ELEC	4010-100	1200-000	55.00	51.00
		1 100	5070-000	A EACH	53.50	22.50
		Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	1,361.25	1,361.25	Qty sold:	25	25
				Qty rtn :	0	0

Prior period -- \*\* Zero quantity sold and returned for prior periods \*\*

2 Whses for 1		Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	5,343.75	5,343.75	Qty sold:	99	99
				Qty rtn :	0	0

2	Hammer, 16 oz. Claw	TOOLS/	4010-100	1200-000	26.50	24.50
		Cen 100	5070-000	A EACH	25.50	9.00
		Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	503.50	503.50	Qty sold:	19	19
				Qty rtn :	0	0

Prior period -- \*\* Zero quantity sold and returned for prior periods \*\*

		TOOLS/	4010-100	1200-000	26.50	24.50
		1 100	5070-000	A EACH	25.50	9.00
		Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	516.75	516.75	Qty sold:	20	20
				Qty rtn :	0	0

Prior period -- \*\* Zero quantity sold and returned for prior periods \*\*

		TOOLS/	4010-100	1200-000	26.50	24.50
		2 100	5070-000	A EACH	25.50	9.00
		Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	0.00	0.00	Qty sold:	0	0
				Qty rtn :	0	0

Prior period -- \*\* Zero quantity sold and returned for prior periods \*\*

Date 06/07/1999 Time 14:58:22

XYZ Company

Report #0215 Page 0002

S A L E S   A N A L Y S I S   B Y   I T E M

Item number range: 1 thru 2 Warehouse: "All"  
 Sort order: Item # Cat/subcat: "All" / "All"  
 Includes items with zero \$ sales ABC code: "All"

Item number	Description-1	Cat/sub-cat	Sales acct #	Inventory acct #	Price-1	Price-3
Item #	Description-2	Whse Vendor	Expense acct #	ABC-cod Stk-unit	Price-2	Replacement cost
		Period-to-date	Year-to-date		Period-to-date	Year-to-date
3 Whses for	2	Period-to-date	Year-to-date		Period-to-date	Year-to-date
	Sales :	1,020.25	1,020.25	Qty sold:	39	39
				Qty rtn :	0	0

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S A L E S A N A L Y S I S B Y I T E M

Item number range: 1 thru 2 Warehouse: "All"  
 Sort order: Item # Cat/subcat: "All" / "All"  
 Includes items with zero \$ sales ABC code: "All"

S U M M A R Y

Item #		Period-to-date	Year-to-date		Period-to-date	Year-to-date
1	Sales :	5,343.75	5,343.75	Qty sold:	99	99
	2 whses			Qty rtn :	0	0
2	Sales :	1,020.25	1,020.25	Qty sold:	39	39
	3 whses			Qty rtn :	0	0
Grand totals:	2 items Sales :	6,364.00	6,364.00	Qty sold:	138	138
				Qty rtn :	0	0

-- End of report --

# SALES ANALYSIS BY ITEM SALES VOLUME

Date 06/07/1999 Time 15:18:02

XYZ Company

Report #0216 Page 0001

S A L E S   A N A L Y S I S   B Y   I T E M   S A L E S   V O L U M E

Item number range: 1 thru 1                      Sort by sales volume, item #                      Warehouse: "All"  
 Inventory acct: "All"                              Number of items: "All"                              Vendor no: "All"  
 Includes items with zero \$ sales                      Cat/subcat: "All" / "All"

Item number	Whse Description	Vendor/ Prod-no	Cat/ Sub-cat	Inv acct ABC Code	Price-1	Price-2	Price-3
1	Drill, 1/4" Power Hand						
	Cen Central	100	TOOLS	1200-000			
		1	ELEC	A	55.00	53.50	51.00
		Period-to-date	Year-to-date		Period-to-date	Year-to-date	
	Sales :	3,982.50	3,982.50		Qty sold: 74	74	74
					Qty rtn : 0	0	0
1	Main	100	TOOLS	1200-000			
		1	ELEC	A	55.00	53.50	51.00
		Period-to-date	Year-to-date		Period-to-date	Year-to-date	
	Sales :	1,361.25	1,361.25		Qty sold: 25	25	25
					Qty rtn : 0	0	0
2	South	100	TOOLS	1200-000			
		1	ELEC	A	55.00	53.50	51.00
		Period-to-date	Year-to-date		Period-to-date	Year-to-date	
	Sales :	0.00	0.00		Qty sold: 0	0	0
					Qty rtn : 0	0	0
3 1							
	Sales :	5,343.75	5,343.75		Qty sold: 99	99	99
					Qty rtn : 0	0	0

Date 06/07/1999 Time 15:18:02

XYZ Company

Report #0216 Page 0002

S A L E S   A N A L Y S I S   B Y   I T E M   S A L E S   V O L U M E

Item number range: 1 thru 1                      Sort by sales volume, item #                      Warehouse: "All"  
 Inventory acct: "All"                              Number of items: "All"                              Vendor no: "All"  
 Includes items with zero \$ sales                      Cat/subcat: "All" / "All"

S U M M A R Y

Item number	Period-to-date	Year-to-date	Period-to-date	Year-to-date
1				
	Sales :	5,343.75	5,343.75	Qty sold: 99
	3 warehouses			Qty rtn : 0
Grand totals:	1 item			
	3 warehouses Sales :	5,343.75	5,343.75	Qty sold: 99
				Qty rtn : 0

-- End of report --

# SALES ANALYSIS BY ITEM CATEGORY

Date 06/07/1999 Time 16:57:28

XYZ Company

Report #0218 Page 0001

## SALES ANALYSIS BY ITEM CATEGORY

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Sub-cat	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Category				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
Cen	*TEMP			Temporary Item	1200-000			0.00000
					EACH	0.00000	0.00000	0.00000
				Period-to-date	Year-to-date	Period-to-date	Year-to-date	
	Sales :			0.00	0.00	Qty sold: 0	0	0
						Qty rtn : 0	0	0
1	*TEMP			Temporary Item	1200-000			0.00000
					EACH	0.00000	0.00000	0.00000
				Period-to-date	Year-to-date	Period-to-date	Year-to-date	
	Sales :			0.00	0.00	Qty sold: 0	0	0
						Qty rtn : 0	0	0
2	*TEMP			Temporary Item	1200-000			0.00000
					EACH	0.00000	0.00000	0.00000
				Period-to-date	Year-to-date	Period-to-date	Year-to-date	
	Sales :			0.00	0.00	Qty sold: 0	0	0
						Qty rtn : 0	0	0
Cen	8			1" Steel Bolts	1200-000			0.20000
					CASE	1.90000	1.60000	1.40000
				Period-to-date	Year-to-date	Period-to-date	Year-to-date	
	Sales :			132.75	132.75	Qty sold: 29.50	29.50	0
						Qty rtn : 0	0	0
1	8			1" Steel Bolts	1200-000			0.20000
					CASE	1.90000	1.60000	1.40000
				Period-to-date	Year-to-date	Period-to-date	Year-to-date	
	Sales :			0.00	0.00	Qty sold: 0	0	0
						Qty rtn : 0	0	0

Date 06/07/1999 Time 16:57:28

XYZ Company

Report #0218 Page 0002

## SALES ANALYSIS BY ITEM CATEGORY

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Sub-cat	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Category				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date

(Cont.)

2	8	1" Steel Bolts	1200-000	0.20000
			CASE	1.90000 1.60000 1.40000
		Period-to-date	Year-to-date	Period-to-date
Sales :		90.00	90.00	Qty sold: 20 20
				Qty rtn : 0 0
Cen	100	Extended Warranty	1200-000	15.00000
		90 Day Warranty	EACH	69.95000 65.95000 60.95000
		Period-to-date	Year-to-date	Period-to-date
Sales :		0.00	0.00	Qty sold: 0 0
				Qty rtn : 0 0
1	100	Extended Warranty	1200-000	15.00000
		90 Day Warranty	EACH	69.95000 65.95000 60.95000
		Period-to-date	Year-to-date	Period-to-date
Sales :		0.00	0.00	Qty sold: 0 0
				Qty rtn : 0 0
2	100	Extended Warranty	1200-000	15.00000
		90 Day Warranty	EACH	69.95000 65.95000 60.95000
		Period-to-date	Year-to-date	Period-to-date
Sales :		0.00	0.00	Qty sold: 0 0
				Qty rtn : 0 0
Cen	1000	Starter Tool Set	1200-000	34.50000
		Kit Item	EACH	110.00000 0.00000 0.00000
		Period-to-date	Year-to-date	Period-to-date
Sales :		660.00	660.00	Qty sold: 6 6
				Qty rtn : 0 0

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XYZ Company

Report #0218 Page 0003

S A L E S A N A L Y S I S B Y I T E M C A T E G O R Y

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Sub-cat				Stk-unit			Price-3
Category			Period-to-date	Year-to-date	Period-to-date	Year-to-date	Year-to-date
(Cont.)							
1	1000	Starter Tool Set	1200-000	34.50000			
		Kit Item	EACH	110.00000 0.00000 0.00000			
		Period-to-date	Year-to-date	Period-to-date			
Sales :		0.00	0.00	Qty sold: 0 0			
				Qty rtn : 0 0			
2	1000	Starter Tool Set	1200-000	34.50000			
		Kit Item	EACH	110.00000 0.00000 0.00000			
		Period-to-date	Year-to-date	Period-to-date			
Sales :		0.00	0.00	Qty sold: 0 0			
				Qty rtn : 0 0			
12 Items for		Sales :	882.75	882.75	Qty sold: 55.50	55.50	55.50
					Qty rtn : 0	0	0
MECH	MTR	Cen	6	Motor, 2hp Submersible	1200-000	55.00000	55.00000
					EACH	150.00000	147.50000 144.00000

		Period-to-date	Year-to-date			Period-to-date	Year-to-date
Sales :		1,620.00	1,620.00	Qty sold:		12	12
				Qty rtn :		0	0
MTR	1	6	Motor, 2hp Submersible	1200-000		55.00000	
				EACH	150.00000	147.50000	144.00000
		Period-to-date	Year-to-date		Period-to-date	Year-to-date	
Sales :		270.00	270.00	Qty sold:		2	2
				Qty rtn :		0	0
MTR	2	6	Motor, 2hp Submersible	1200-000		55.00000	
				EACH	150.00000	147.50000	144.00000
		Period-to-date	Year-to-date		Period-to-date	Year-to-date	
Sales :		0.00	0.00	Qty sold:		0	0
				Qty rtn :		0	0

Date 06/07/1999 Time 16:57:28

XYZ Company

Report #0218 Page 0004

S A L E S   A N A L Y S I S   B Y   I T E M   C A T E G O R Y

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Sub-cat	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Category					Stk-unit	Period-to-date	Period-to-date	Price-3
						Year-to-date	Year-to-date	Year-to-date
MECH	(Cont.)							
			3 Items for MECH	Sales :		1,890.00	1,890.00	
						Qty sold:	14	14
						Qty rtn :	0	0
MISC								
		Cen	*MISC-PARTS	Miscellaneous Parts	1200-000			0.00000
					EACH	0.00000	0.00000	0.00000
				Period-to-date		Year-to-date	Period-to-date	Year-to-date
				Sales :		125.00	125.00	
						Qty sold:	1	1
						Qty rtn :	0	0
		1	*MISC-PARTS	Miscellaneous Parts	1200-000			0.00000
					EACH	0.00000	0.00000	0.00000
				Period-to-date		Year-to-date	Period-to-date	Year-to-date
				Sales :		0.00	0.00	
						Qty sold:	0	0
						Qty rtn :	0	0
		2	*MISC-PARTS	Miscellaneous Parts	1200-000			0.00000
					EACH	0.00000	0.00000	0.00000
				Period-to-date		Year-to-date	Period-to-date	Year-to-date
				Sales :		0.00	0.00	
						Qty sold:	0	0
						Qty rtn :	0	0
			3 Items for MISC	Sales :		125.00	125.00	
						Qty sold:	1	1
						Qty rtn :	0	0
TOOLS								
		Cen	2	Hammer, 16 oz. Claw	1200-000			9.00000
					EACH	26.50000	25.50000	24.50000
				Period-to-date		Year-to-date	Period-to-date	Year-to-date
				Sales :		503.50	503.50	
						Qty sold:	19	19
						Qty rtn :	0	0
		1	2	Hammer, 16 oz. Claw	1200-000			9.00000
					EACH	26.50000	25.50000	24.50000
				Period-to-date		Year-to-date	Period-to-date	Year-to-date
				Sales :		516.75	516.75	
						Qty sold:	20	20
						Qty rtn :	0	0

S A L E S   A N A L Y S I S   B Y   I T E M   C A T E G O R Y

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Sub-cat	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Category				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
TOOLS (Cont.)								
		2	2	Hammer, 16 oz. Claw	1200-000			9.00000
					EACH	26.50000	25.50000	24.50000
				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
			Sales :	0.00	0.00	Qty sold:	0	0
						Qty rtn :	0	0
		Cen	3	Wrench, 3/8" Socket Set	1200-000			8.50000
					EACH	23.50000	23.00000	22.50000
				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
			Sales :	1,480.50	1,480.50	Qty sold:	63	63
						Qty rtn :	0	0
		1	3	Wrench, 3/8" Socket Set	1200-000			8.50000
					EACH	23.50000	23.00000	22.50000
				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
			Sales :	0.00	0.00	Qty sold:	0	0
						Qty rtn :	0	0
		2	3	Wrench, 3/8" Socket Set	1200-000			8.50000
					EACH	23.50000	23.00000	22.50000
				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
			Sales :	117.50	117.50	Qty sold:	5	5
						Qty rtn :	0	0
		Cen	5	Chisel, 5 pc Set	1200-000			5.00000
					EACH	17.59000	17.29000	17.00000
				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
			Sales :	615.65	615.65	Qty sold:	35	35
						Qty rtn :	0	0
		1	5	Chisel, 5 pc Set	1200-000			5.00000
					EACH	17.59000	17.29000	17.00000
				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
			Sales :	87.95	87.95	Qty sold:	5	5
						Qty rtn :	0	0

S A L E S   A N A L Y S I S   B Y   I T E M   C A T E G O R Y

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Sub-cat	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Category				Period-to-date	Year-to-date	Period-to-date	Period-to-date	Year-to-date
TOOLS (Cont.)								

2	5	Chisel, 5 pc Set	1200-000	5.00000			
			EACH	17.59000	17.29000	17.00000	17.00000
		Period-to-date	Year-to-date	Period-to-date	Year-to-date	Period-to-date	Year-to-date
Sales :		167.10	167.10	Qty sold: 10	10	Qty rtn : 0	0
Cen	7	Gauge, Hi-pressure	1200-000	6.59000			
			EACH	19.50000	19.00000	18.50000	18.50000
		Period-to-date	Year-to-date	Period-to-date	Year-to-date	Period-to-date	Year-to-date
Sales :		2,418.00	2,418.00	Qty sold: 124	124	Qty rtn : 0	0
1	7	Gauge, Hi-pressure	1200-000	6.59000			
			EACH	19.50000	19.00000	18.50000	18.50000
		Period-to-date	Year-to-date	Period-to-date	Year-to-date	Period-to-date	Year-to-date
Sales :		195.00	195.00	Qty sold: 10	10	Qty rtn : 0	0
2	7	Gauge, Hi-pressure	1200-000	6.59000			
			EACH	19.50000	19.00000	18.50000	18.50000
		Period-to-date	Year-to-date	Period-to-date	Year-to-date	Period-to-date	Year-to-date
Sales :		370.50	370.50	Qty sold: 20	20	Qty rtn : 0	0
ELEC	Cen	1	Drill, 1/4" Power Hand	1200-000	22.50000		
				EACH	55.00000	53.50000	51.00000
		Period-to-date	Year-to-date	Period-to-date	Year-to-date	Period-to-date	Year-to-date
Sales :		3,982.50	3,982.50	Qty sold: 74	74	Qty rtn : 0	0
ELEC	1	1	Drill, 1/4" Power Hand	1200-000	22.50000		
				EACH	55.00000	53.50000	51.00000
		Period-to-date	Year-to-date	Period-to-date	Year-to-date	Period-to-date	Year-to-date
Sales :		1,361.25	1,361.25	Qty sold: 25	25	Qty rtn : 0	0

Date 06/07/1999 Time 16:57:29

XYZ Company

Report #0218 Page 0007

S A L E S   A N A L Y S I S   B Y   I T E M   C A T E G O R Y

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

Category	Sub-cat	Whse	Item number	Description	Inv acct	Price-1	Price-2	Replacement cost
Category				Year-to-date	Stk-unit	Period-to-date	Period-to-date	Year-to-date
TOOLS (Cont.)								
ELEC	2	1	Drill, 1/4" Power Hand	1200-000	22.50000			
					EACH	55.00000	53.50000	51.00000
			Period-to-date	Year-to-date		Period-to-date	Year-to-date	
Sales :			0.00	0.00	Qty sold: 0	0	Qty rtn : 0	0
ELEC	Cen	4	Saw, 2hp 7 1/4" Circular	1200-000	18.00000			
					EACH	56.00000	55.00000	54.00000
			Period-to-date	Year-to-date		Period-to-date	Year-to-date	
Sales :			1,120.00	1,120.00	Qty sold: 20	20	Qty rtn : 0	0
ELEC	1	4	Saw, 2hp 7 1/4" Circular	1200-000	18.00000			
					EACH	56.00000	55.00000	54.00000
			Period-to-date	Year-to-date		Period-to-date	Year-to-date	
Sales :			0.00	0.00	Qty sold: 0	0	Qty rtn : 0	0

ELEC	2	4	Saw, 2hp 7 1/4" Circular	1200-000			18.00000
				EACH	56.00000	55.00000	54.00000
			Period-to-date	Year-to-date	Period-to-date	Year-to-date	
	Sales	:	53.20	53.20	Qty sold:	1	1
					Qty rtn :	0	0
18 Items for TOOLS	Sales	:	12,989.40	12,989.40	Qty sold:	431	431
					Qty rtn :	0	0

Date 06/07/1999 Time 16:57:29

XYZ Company

Report #0218 Page 0008

S A L E S   A N A L Y S I S   B Y   I T E M   C A T E G O R Y

Category range: "First" thru "Last"

Sub-cat range: "First" thru "Last"

Inventory account: "All"

Warehouse: "All"

# of items: "All"

Includes items with zero \$ sales

Sort by category, sub-category, item #

S U M M A R Y

Category		Period-to-date	Year-to-date	Period-to-date	Year-to-date
	12 items Sales	882.75	882.75	Qty sold:	55.50
	33.3% of items			Qty rtn :	0
MECH	3 items Sales	1,890.00	1,890.00	Qty sold:	14
	8.3% of items			Qty rtn :	0
MISC	3 items Sales	125.00	125.00	Qty sold:	1
	8.3% of items			Qty rtn :	0
TOOLS	18 items Sales	12,989.40	12,989.40	Qty sold:	431
	50.0% of items			Qty rtn :	0
Grand totals:	4 categories				
	36 items Sales	15,887.15	15,887.15	Qty sold:	501.50
				Qty rtn :	0

-- End of report --



600 Ariel Enterprises

1 Qty sold: 5  
Drill, 1/4" Power Hand Sales : 275.00

TOOLS/ELEC 1200-000  
Unit = EACH

1 items for 600 Qty sold: 5  
Sales : 275.00

Date 06/07/1999 Time 19:21:37

XYZ Company

Report #0219 Page 0003

S A L E S A N A L Y S I S B Y I T E M S F O R A C U S T O M E R

Customers: "First" thru "Last" # of Items: "All" Inv. acct #: "All" Sequence by  
Items: 1 thru 1 Cat/Sub-cat: "All"/"All"  
Includes items with zero \$ sales Sort by customer #, item #

Customer number S U M M A R Y Period-1  
1/01/99  
to  
3/31/99

1 Elliot Enterprises  
1 item Qty sold: 5  
20.0% of items Sales : 245.00

40 Washington, Mrs. Thomas  
1 item Qty sold: 0  
20.0% of items Sales : 0.00

99 Anthony Jones, Inc.  
1 item Qty sold: 4  
20.0% of items Sales : 220.00

200 21st Century Enterprises  
1 item Qty sold: 10  
20.0% of items Sales : 550.00

600 Ariel Enterprises  
1 item Qty sold: 5  
20.0% of items Sales : 275.00

Grand totals:  
5 customers Qty sold: 24  
Sales : 1,290.00

-- End of report --

# SALES ANALYSIS BY RESPONSIBLE SALES REP

Date 06/07/1999 Time 21:39:54

XYZ Company

Report #0220 Page 0001

S A L E S   A N A L Y S I S   B Y   R E S P O N S I B L E   S A L E S   R E P

Sales rep range: "First" thru "Last"

State: "All"

Sales territory: "All"

Customer number range: "First" thru "Last"

# of Customers: "All"

Customer type: "All"

Includes customers with zero \$ sales

Sls-rep	Customer name/Address	SIC	Cus-typ		Period-to-date	Year-to-date	Last year
Sls-rep	Customer #		Terr		Period-to-date	Year-to-date	Last year
-----							
001	Thomas J. Finch						
1	Elliot Enterprises Glendale, CA 94994	USA	WSL	Sales :	292.00	292.00	0.00
10	Harris, Goldberg & Jones San Diego, CA 92100	USA	RET	Sales :	276.40	276.40	0.00
40	Washington, Mrs. Thomas Dallas, TX 75201	USA	RET	Sales :	955.00	955.00	0.00
99	Anthony Jones, Inc. Alberta, CA 12345	USA	RET	Sales :	556.00	556.00	0.00
C123	Peter Cash Portland, OR 98765-4321	USA	CASH	Sales :	0.00	0.00	0.00
	5 Customers for 001			Sales :	2,079.40	2,079.40	0.00
-----							
010	William B. Wilkenson						
200	21st Century Enterprises San Francisco, CA 95782	USA	RET	Sales :	575.70	575.70	0.00
	1 Customers for 010			Sales :	575.70	575.70	0.00
-----							
020	Jonathan Harris						
30	W.J. Bjornfreg A/G Los Angeles, CA 92100		WSL	Sales :	163.00	163.00	0.00
	1 Customers for 020			Sales :	163.00	163.00	0.00
-----							

Date 06/07/1999 Time 21:39:54

XYZ Company

Report #0220 Page 0002

S A L E S   A N A L Y S I S   B Y   R E S P O N S I B L E   S A L E S   R E P

Sales rep range: "First" thru "Last"

State: "All"

Sales territory: "All"

Customer number range: "First" thru "Last"

# of Customers: "All"

Customer type: "All"

Includes customers with zero \$ sales

Sls-rep	Customer name/Address	SIC	Cus-typ		Period-to-date	Year-to-date	Last year
Sls-rep	Customer #		Terr		Period-to-date	Year-to-date	Last year
-----							
023	Margaret Rockwell (Cont.)						
600	Ariel Enterprises Los Angeles, CA 90005	USA	RET	Sales :	525.00	525.00	0.00

			3 Customers for 023	Sales :	1,218.20	1,218.20	0.00
15A	D.W. Langford						
	*401	Miscellaneous customer	RET	Sales :	0.00	0.00	0.00
			1 Customers for 15A	Sales :	0.00	0.00	0.00
789	Avram Goldberger						
	50	Space Concepts & Design New York, NY 10052 USA	RET	Sales :	235.00	235.00	0.00
			1 Customers for 789	Sales :	235.00	235.00	0.00

Date 06/07/1999 Time 21:39:55 XYZ Company Report #0220 Page 0003

S A L E S A N A L Y S I S B Y R E S P O N S I B L E S A L E S R E P

Sales rep range: "First" thru "Last" State: "All" Sales territory: "All"  
 Customer number range: "First" thru "Last" # of Customers: "All" Customer type: "All"  
 Includes customers with zero \$ sales

S U M M A R Y

Sls-rep			Period-to-date	Year-to-date	Last year
001	Thomas J. Finch	5 customers 41.7% of custs	Sales : 2,079.40	2,079.40	0.00
010	William B. Wilkenson	1 customers 8.3% of custs	Sales : 575.70	575.70	0.00
020	Jonathan Harris	1 customers 8.3% of custs	Sales : 163.00	163.00	0.00
023	Margaret Rockwell	3 customers 25.0% of custs	Sales : 1,218.20	1,218.20	0.00
15A	D.W. Langford	1 customers 8.3% of custs	Sales : 0.00	0.00	0.00
789	Avram Goldberger	1 customers 8.3% of custs	Sales : 235.00	235.00	0.00
Grand totals:					
	6 sales reps	12 customers	Sales : 4,271.30	4,271.30	0.00

-- End of report --



789 Avram Goldberger

50 Space Concepts & Design Sales : 235.00  
789 New York, NY USA 10052

1 Customers for 789 Sales : 235.00

Date 06/07/1999 Time 21:46:50

XYZ Company

Report #0221 Page 0003

S A L E S A N A L Y S I S B Y A C T U A L S A L E S R E P

Sales rep range: "First" thru "Last" Sort by sales rep, customer # Customer type: "All"  
Customer number range: "First" thru "Last" # of Customers: "All" Sls territory: "All"  
Includes customers with zero \$ sales State: "All" Sequence by period-1

-----  
S U M M A R Y Period-1  
Actual sales rep 1/01/99  
to  
1/31/99  
-----

001 Thomas J. Finch  
4 customers Sales : 2,079.40  
40.0% of custs

010 William B. Wilkenson  
1 customer Sales : 606.00  
10.0% of custs

020 Jonathan Harris  
1 customer Sales : 163.00  
10.0% of custs

023 Margaret Rockwell  
3 customers Sales : 1,218.20  
30.0% of custs

789 Avram Goldberger  
1 customer Sales : 235.00  
10.0% of custs

Grand totals:  
5 sales reps 10 customers Sales : 4,301.60  
-----

-- End of report --

# SALES ANALYSIS BY SALES TERRITORY

Date 06/07/1999 Time 21:53:58

XYZ Company

Report #0222 Page 0001

## S A L E S   A N A L Y S I S   B Y   S A L E S   T E R R I T O R Y

Sales territory: "All"

State: "All"

Sort by territory, customer #

Sales rep: "All"

Customer type: "All"

Includes customers with zero \$ sales

" " = Territory not defined

Terr	Customer #	Customer name/Address	SIC	Sls-rep Type	Period-to-date	Year-to-date	Last year
---	*401	Miscellaneous customer		15A RET	Sales : 0.00	0.00	0.00
	1	Elliot Enterprises Glendale, CA 94994 USA		1 WSL	Sales : 292.00	292.00	0.00
	10	Harris, Goldberg & Jones San Diego, CA 92100 USA		1 RET	Sales : 276.40	276.40	0.00
	30	W.J. Bjornfreg A/G Los Angeles, CA 92100		20 WSL	Sales : 163.00	163.00	0.00
	40	Washington, Mrs. Thomas Dallas, TX 75201 USA		1 RET	Sales : 955.00	955.00	0.00
	50	Space Concepts & Design New York, NY 10052 USA		789 RET	Sales : 235.00	235.00	0.00
	600	Ariel Enterprises Los Angeles, CA 90005 USA		23 RET	Sales : 525.00	525.00	0.00
	C123	Peter Cash Portland, OR 98765-4321 USA		1 CASH	Sales : 0.00	0.00	0.00
	12 Customers for ***				Sales : 4,271.30	4,271.30	0.00

Date 06/07/1999 Time 21:53:58

XYZ Company

Report #0222 Page 0002

## S A L E S   A N A L Y S I S   B Y   S A L E S   T E R R I T O R Y

Sales territory: "All"

State: "All"

Sort by territory, customer #

Sales rep: "All"

Customer type: "All"

Includes customers with zero \$ sales

" " = Territory not defined

### S U M M A R Y

Territory	Period-to-date	Year-to-date	Last year
12 customers 100.0% of custs	Sales : 4,271.30	4,271.30	0.00
Grand totals: 1 territory	12 customers Sales : 4,271.30	4,271.30	0.00

-- End of report --



# SALES ANALYSIS BY ZIP CODE

Date 06/07/1999 Time 22:18:02

XYZ Company

Report #0224 Page 0001

S A L E S   A N A L Y S I S   B Y   Z I P   C O D E

Zip code range: "First" thru "Last"      Sales territory: "All"      State: "All"  
 Current period ending date: 1/31/99      Customer type: "All"      Includes customers with zero \$ sales  
    Sales rep: "All"      SIC: "All"

S U M M A R Y

Zip Code	No-of-custs	Pct-of-custs		Period-to-date	Year-to-date	Last Year
	*401	Miscellaneous customer	RET	Sales : 0.00	0.00	0.00
			15A			
		1 Customer for	--	Sales : 0.00	0.00	0.00
10052	50	Space Concepts & Design New York, NY USA	RET	Sales : 235.00	235.00	0.00
			789			
		1 Customer for 100	--	Sales : 235.00	235.00	0.00
12345	99	Anthony Jones, Inc. Alberta, CA USA	RET	Sales : 556.00	556.00	0.00
			1			
		1 Customer for 123	--	Sales : 556.00	556.00	0.00
75201	40	Washington, Mrs. Thomas Dallas, TX USA	RET	Sales : 955.00	955.00	0.00
			1			
		1 Customer for 752	--	Sales : 955.00	955.00	0.00
	30	W.J. Bjornfreg A/G Los Angeles, CA	WSL	Sales : 163.00	163.00	0.00
			20			
		2 Customers for 921	--	Sales : 439.40	439.40	0.00
94994	1	Elliot Enterprises Glendale, CA USA	WSL	Sales : 292.00	292.00	0.00
			1			
		1 Customer for 949	--	Sales : 292.00	292.00	0.00

Date 06/07/1999 Time 22:18:02

XYZ Company

Report #0224 Page 0002

S A L E S   A N A L Y S I S   B Y   Z I P   C O D E

Zip code range: "First" thru "Last"      Sales territory: "All"      State: "All"  
 Current period ending date: 1/31/99      Customer type: "All"      Includes customers with zero \$ sales  
    Sales rep: "All"      SIC: "All"

S U M M A R Y

Zip Code	No-of-custs	Pct-of-custs		Period-to-date	Year-to-date	Last Year
95782	200	21st Century Enterprises San Francisco, CA USA	RET	Sales : 575.70	575.70	0.00
			10			
		1 Customer for 957	--	Sales : 575.70	575.70	0.00
98765-4321	C123	Peter Cash	CASH	Sales : 0.00	0.00	0.00

Portland, OR USA 1

```

-----
1 Customer for 987 -- Sales : 0.00 0.00 0.00
-----

```

Date 06/07/1999 Time 22:18:02

XYZ Company

Report #0224 Page 0003

S A L E S A N A L Y S I S B Y Z I P C O D E

```

Zip code range: "First" thru "Last" Sales territory: "All" State: "All"
Current period ending date: 1/31/99 Customer type: "All" Includes customers with zero $ sales
Sales rep: "All" SIC: "All"

```

S U M M A R Y

Zip Code	No-of-custs	Pct-of-custs		Period-to-date	Year-to-date	Last Year
	1	8.3	Sales :	0.00	0.00	0.00
100	1	8.3	Sales :	235.00	235.00	0.00
123	1	8.3	Sales :	556.00	556.00	0.00
752	1	8.3	Sales :	955.00	955.00	0.00
900	2	16.7	Sales :	657.95	657.95	0.00
911	1	8.3	Sales :	560.25	560.25	0.00
921	2	16.7	Sales :	439.40	439.40	0.00
949	1	8.3	Sales :	292.00	292.00	0.00
957	1	8.3	Sales :	575.70	575.70	0.00
987	1	8.3	Sales :	0.00	0.00	0.00
Grand totals:						
	10 Zip codes	12 Customers	Sales :	4,271.30	4,271.30	0.00

-- End of report --

# CUSTOMER COMPARATIVE EXCEPTION REPORT

Date 06/08/1999 Time 10:45:38

XYZ Company

Report #0225 Page 0001

C U S T O M E R   C O M P A R A T I V E   E X C E P T I O N   R E P O R T

Load year: 1999

Data loaded from: IHSLIN00

-----  
Customer-#                      Sales                      Cost      # of invoices  
-----

All customers from this invoice history file successfully loaded into customer comparative file.

-- End of report --

# MONTHLY CUSTOMER COMPARATIVES

Date 06/08/1999 Time 11:20:43

XYZ Company

Report #0226 Page 0001

## MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 5/31/9  
 9Sequenced by Customer # Sales rep: "All" SIC: "All"

\*\*\* Grand Totals \*\*\*

Cust #	Rep	Customer name	City, ST Zip code			Contact 1 name	Contact 1 phone			Total
			January	February	March		April	May	June	
			July	August	September	October	November	December		
1	1	Elliot Enterprises	Glendale, CA	94994		Paul Elliot	213-779-6010			
-----										
1999 Sales:		292	0	0	0	0	96-	0		
Cost:		77	0	0	0	0	29-	0		
Margin %:		73.6	0.0	0.0	0.0	0.0	69.8	0.0		
1999 Sales:		0	0	0	0	0	0	0		196
Cost:		0	0	0	0	0	0	0		48
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		75.5
1998 Sales:		0	0	0	0	0	0	0		
Cost:		0	0	0	0	0	0	0		
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1998 Sales:		0	0	0	0	0	0	0		0
Cost:		0	0	0	0	0	0	0		0
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0
1997 Sales:		0	0	0	0	0	0	0		
Cost:		0	0	0	0	0	0	0		
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1997 Sales:		0	0	0	0	0	0	0		0
Cost:		0	0	0	0	0	0	0		0
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0
10	1	Harris, Goldberg & Jones	San Diego, CA	92100		Michael Jones	714-221-8500			
-----										
1999 Sales:		276	0	0	0	0	224	0		
Cost:		77	0	0	0	0	72	0		
Margin %:		72.0	0.0	0.0	0.0	0.0	67.9	0.0		
1999 Sales:		0	0	0	0	0	0	0		500
Cost:		0	0	0	0	0	0	0		149
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		70.2
1998 Sales:		0	0	0	0	0	0	0		
Cost:		0	0	0	0	0	0	0		
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1998 Sales:		0	0	0	0	0	0	0		0
Cost:		0	0	0	0	0	0	0		0
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0	0.0		0.0

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XYZ Company

Report #0226 Page 0002

## MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 5/31/9  
 9Sequenced by Customer # Sales rep: "All" SIC: "All"

\*\*\* Grand Totals \*\*\*

Cust #	Rep	Customer name	City, ST Zip code			Contact 1 name	Contact 1 phone			Total
			January	February	March		April	May	June	
			July	August	September		October	November	December	

10	1	Harris, Goldberg & Jones	San Diego, CA	92100	Michael Jones	714-221-8500			(Cont.)
1997 Sales:	0	0	0	0	0	0	0		
Cost:	0	0	0	0	0	0	0		
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1997 Sales:	0	0	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

30	20	W.J. Bjornfreg A/G	Los Angeles, CA	92100	Mary Kneip	213-886-7722			
1999 Sales:	163	0	0	0	0	0	0		
Cost:	52	0	0	0	0	0	0		
Margin %:	67.8	0.0	0.0	0.0	0.0	0.0	0.0		
1999 Sales:	0	0	0	0	0	0	0	163	
Cost:	0	0	0	0	0	0	0	52	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	68.1	

1998 Sales:	0	0	0	0	0	0	0		
Cost:	0	0	0	0	0	0	0		
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1998 Sales:	0	0	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

1997 Sales:	0	0	0	0	0	0	0		
Cost:	0	0	0	0	0	0	0		
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1997 Sales:	0	0	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

40	1	Washington, Mrs. Thomas	Dallas, TX	75201	Ann Washington	617-444-7780			
1999 Sales:	955	0	0	0	0	78	0		
Cost:	365	0	0	0	0	20	0		
Margin %:	61.8	0.0	0.0	0.0	0.0	73.9	0.0		
1999 Sales:	0	0	0	0	0	0	0	1,033	
Cost:	0	0	0	0	0	0	0	385	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	62.7	

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MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
Includes customers with zero \$ sales Customer type: "All" Last transfer date: 5/31/9  
9Sequenced by Customer # Sales rep: "All" SIC: "All"

\*\*\* Grand Totals \*\*\*

Cust #	Rep	Customer name	City, ST Zip code			Contact 1 name	Contact 1 phone			Total
			January	February	March		April	May	June	
			July	August	September		October	November	December	

40	1	Washington, Mrs. Thomas	Dallas, TX	75201	Ann Washington	617-444-7780			(Cont.)
1998 Sales:	0	0	0	0	0	0	0		
Cost:	0	0	0	0	0	0	0		
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0		
1998 Sales:	0	0	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

1997 Sales:	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	
1997 Sales:	0	0	0	0	0	0	0
Cost:	0	0	0	0	0	0	0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0

50                    789 Space Concepts & Design    New York, NY    10052                    Mike Mallin                    212-220-9981

-----

1999 Sales:	235	0	0	0	0	0	
Cost:	85	0	0	0	0	0	
Margin %:	63.8	0.0	0.0	0.0	0.0	0.0	
1999 Sales:	0	0	0	0	0	0	235
Cost:	0	0	0	0	0	0	85
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	63.8
1998 Sales:	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	
1998 Sales:	0	0	0	0	0	0	0
Cost:	0	0	0	0	0	0	0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0
1997 Sales:	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	
1997 Sales:	0	0	0	0	0	0	0
Cost:	0	0	0	0	0	0	0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First"            to "Last"                    Sales territory: "All"                    State: "All"  
Includes customers with zero \$ sales                    Customer type: "All"                    Last transfer date: 5/31/9  
9Sequenced by Customer #                    Sales rep: "All"                    SIC: "All"

\*\*\* Grand Totals \*\*\*

-----

Cust #	Rep	Customer name	City, ST Zip code			Contact 1 name	Contact 1 phone			Total
			January	February	March		April	May	June	
		July	August	September	October	November	December			
99	1	Anthony Jones, Inc.	Alberta, CA	12345		T.A. Wagner	123-456-7890			
-----										
1999 Sales:		556	0	0	0	0	0			
Cost:		156	0	0	0	0	0			
Margin %:		71.9	0.0	0.0	0.0	0.0	0.0			
1999 Sales:		0	0	0	0	0	0		556	
Cost:		0	0	0	0	0	0		156	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		71.9	
1998 Sales:		0	0	0	0	0	0			
Cost:		0	0	0	0	0	0			
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0			
1998 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
1997 Sales:		0	0	0	0	0	0			
Cost:		0	0	0	0	0	0			
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0			
1997 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	

Cust #	Rep	Customer name	City, ST	Zip code	Contact 1 name	Contact 1 phone	
100	23	Neptune Underwater Supply	Santa Marina, CA	91100	Sam Johnson	408-776-1102	
-----							
1999 Sales:	560	0	0	0	0	0	
Cost:	220	0	0	0	0	0	
Margin %:	60.6	0.0	0.0	0.0	0.0	0.0	
1999 Sales:	0	0	0	0	0	0	560
Cost:	0	0	0	0	0	0	220
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	60.7
1998 Sales:	0	0	0	0	0	0	
Cost:	0	0	0	0	0	0	
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	
1998 Sales:	0	0	0	0	0	0	0
Cost:	0	0	0	0	0	0	0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0

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MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
Includes customers with zero \$ sales Customer type: "All" Last transfer date: 5/31/9  
9Sequenced by Customer # Sales rep: "All" SIC: "All"

\*\*\* Grand Totals \*\*\*

Cust #	Rep	Customer name	City, ST Zip code			Contact 1 name	Contact 1 phone				Total
			January	February	March		April	May	June		
		July	August	September	October	November	December				
100	23	Neptune Underwater Supply	Santa Marina, CA	91100	Sam Johnson	408-776-1102					(Cont.)
-----											
1997 Sales:	0	0	0	0	0	0	0	0			
Cost:	0	0	0	0	0	0	0	0			
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
1997 Sales:	0	0	0	0	0	0	0	0			0
Cost:	0	0	0	0	0	0	0	0			0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			0.0
200	10	21st Century Enterprises	San Francisco, CA	95782	Lou Mandel	415-555-7844					
-----											
1999 Sales:	606	0	0	0	0	0	0	0			
Cost:	138	0	0	0	0	0	0	0			
Margin %:	77.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
1999 Sales:	0	0	0	0	0	0	0	0			606
Cost:	0	0	0	0	0	0	0	0			138
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			77.2
1998 Sales:	0	0	0	0	0	0	0	0			
Cost:	0	0	0	0	0	0	0	0			
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
1998 Sales:	0	0	0	0	0	0	0	0			0
Cost:	0	0	0	0	0	0	0	0			0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			0.0
1997 Sales:	0	0	0	0	0	0	0	0			
Cost:	0	0	0	0	0	0	0	0			
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
1997 Sales:	0	0	0	0	0	0	0	0			0
Cost:	0	0	0	0	0	0	0	0			0
Margin %:	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			0.0
300	23	Beverly Beauty Supply	Los Angeles, CA	90005	Angie Peters	213-778-9000					
-----											
1999 Sales:	132	0	0	0	0	0	0	0			
Cost:	27	0	0	0	0	0	0	0			
Margin %:	79.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
1999 Sales:	0	0	0	0	0	0	0	0			132

Cost: 0 0 0 0 0 0 0 27  
 Margin %: 0.0 0.0 0.0 0.0 0.0 0.0 0.0 79.5

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XYZ Company

Report #0226 Page 0006

MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 5/31/9  
 9Sequenced by Customer # Sales rep: "All" SIC: "All"

\*\*\* Grand Totals \*\*\*

Cust #	Rep	Customer name	City, ST Zip code			Contact 1 name	Contact 1 phone			Total
			January	February	March		April	May	June	
		July	August	September	October	November	December			
300	23	Beverly Beauty Supply	Los Angeles, CA	90005	Angie Peters	213-778-9000			(Cont.)	
-----										
1998 Sales:		0	0	0	0	0	0			
Cost:		0	0	0	0	0	0			
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0			
1998 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
1997 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
1997 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
600	23	Ariel Enterprises	Los Angeles, CA	90005	M.J. Thorpe	213-554-4300				
-----										
1999 Sales:		525	0	0	0	0	0			
Cost:		147	0	0	0	0	0			
Margin %:		71.9	0.0	0.0	0.0	0.0	0.0			
1999 Sales:		0	0	0	0	0	0		525	
Cost:		0	0	0	0	0	0		147	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		72.0	
1998 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
1998 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
1997 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	
1997 Sales:		0	0	0	0	0	0		0	
Cost:		0	0	0	0	0	0		0	
Margin %:		0.0	0.0	0.0	0.0	0.0	0.0		0.0	

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XYZ Company

Report #0226 Page 0007

MONTHLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 5/31/9  
 9Sequenced by Customer # Sales rep: "All" SIC: "All"

\*\*\* Grand Totals \*\*\*

	January July	February August	March September	April October	May November	June December	Total
1999 Sales:	4,300	0	0	0	206	0	
	0	0	0	0	0	0	4,506
Cost:	1,344	0	0	0	63	0	
	0	0	0	0	0	0	1,407
Margin %:	68.7	0.0	0.0	0.0	69.4	0.0	
	0.0	0.0	0.0	0.0	0.0	0.0	68.8
1998 Sales:							0
Cost:							0
Margin %:							0.0
1997 Sales:							0
Cost:							0
Margin %:							0.0
Report total:	10 Customers						

-- End of report --

# QUARTERLY CUSTOMER COMPARATIVES

Date 06/08/1999 Time 11:57:34

XYZ Company

Report #0229 Page 0001

## Q U A R T E R L Y C U S T O M E R C O M P A R A T I V E S

Customer # range: 1 to 30 Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 6/30/99  
 Sequenced by Sales Rep, Customer Sales rep: "All" SIC: "All"

```
-----
Rep  Cust #   Customer name           City, ST Zip code      Contact 1 name          Contact 1 phone
      Quarter-1   Quarter-2             Quarter-3              Quarter-4              Total
      (Jan - Mar) (Apr - Jun)           (Jul - Sep)            (Oct - Dec)
-----
```

Rep	Cust #	Customer name	City, ST Zip code	Contact 1 name	Contact 1 phone		
			Quarter-1 (Jan - Mar)	Quarter-2 (Apr - Jun)	Quarter-3 (Jul - Sep)	Quarter-4 (Oct - Dec)	Total
1	1	Elliot Enterprises	Glendale, CA 94994	Paul Elliot	213-779-6010		
		1999 Sales:	292	196	0	0	488
		Cost:	77	48	0	0	125
		Margin:	73.6	75.5	0.0	0.0	74.4
		1998 Sales:	0	0	0	0	0
		Cost:	0	0	0	0	0
		Margin:	0.0	0.0	0.0	0.0	0.0
		1997 Sales:	0	0	0	0	0
		Cost:	0	0	0	0	0
		Margin:	0.0	0.0	0.0	0.0	0.0

1	10	Harris, Goldberg & Jones	San Diego, CA 92100	Michael Jones	714-221-8500		
		1999 Sales:	276	500	0	0	776
		Cost:	77	149	0	0	226
		Margin:	72.0	70.2	0.0	0.0	70.9
		1998 Sales:	0	0	0	0	0
		Cost:	0	0	0	0	0
		Margin:	0.0	0.0	0.0	0.0	0.0
		1997 Sales:	0	0	0	0	0
		Cost:	0	0	0	0	0
		Margin:	0.0	0.0	0.0	0.0	0.0

Sales rep: Thomas J. Finch

		1999 Sales:	568	696	0	0	1,264
		Cost:	154	197	0	0	351
		Margin:	72.8	71.7	0.0	0.0	72.2
		1998 Sales:	0	0	0	0	0
		Cost:	0	0	0	0	0
		Margin:	0.0	0.0	0.0	0.0	0.0
		1997 Sales:	0	0	0	0	0
		Cost:	0	0	0	0	0
		Margin:	0.0	0.0	0.0	0.0	0.0

2 Customers for Thomas J. Finch

Date 06/08/1999 Time 11:57:34

XYZ Company

Report #0229 Page 0002

## Q U A R T E R L Y C U S T O M E R C O M P A R A T I V E S

Customer # range: 1 to 30 Sales territory: "All" State: "All"

Includes customers with zero \$ sales  
 Sequenced by Sales Rep, Customer

Customer type: "All"  
 Sales rep: "All"

Last transfer date: 6/30/99  
 SIC: "All"

Rep	Cust #	Customer name	City, ST Zip code		Contact 1 name				Contact 1 phone
			Quarter-1 (Jan - Mar)	Quarter-2 (Apr - Jun)	Quarter-3 (Jul - Sep)	Quarter-4 (Oct - Dec)	Total		
20	30	W.J. Bjornfreg A/G	Los Angeles, CA	92100	Mary Kneip				213-886-7722
-----									
1999 Sales:			163	163	0	0	0	326	
Cost:			52	52	0	0	0	104	
Margin:			67.8	67.8	0.0	0.0	0.0	68.1	
1998 Sales:			0	0	0	0	0	0	
Cost:			0	0	0	0	0	0	
Margin:			0.0	0.0	0.0	0.0	0.0	0.0	
1997 Sales:			0	0	0	0	0	0	
Cost:			0	0	0	0	0	0	
Margin:			0.0	0.0	0.0	0.0	0.0	0.0	

Sales rep: Jonathan Harris

1999 Sales:			163	163	0	0	0	326
Cost:			52	52	0	0	0	104
Margin:			67.8	67.8	0.0	0.0	0.0	68.1
1998 Sales:			0	0	0	0	0	0
Cost:			0	0	0	0	0	0
Margin:			0.0	0.0	0.0	0.0	0.0	0.0
1997 Sales:			0	0	0	0	0	0
Cost:			0	0	0	0	0	0
Margin:			0.0	0.0	0.0	0.0	0.0	0.0

1 Customer for Jonathan Harris

Date 06/08/1999 Time 11:57:34

XYZ Company

Report #0229 Page 0003

Q U A R T E R L Y C U S T O M E R C O M P A R A T I V E S

Customer # range: 1 to 30  
 Includes customers with zero \$ sales  
 Sequenced by Sales Rep, Customer

Sales territory: "All"  
 Customer type: "All"  
 Sales rep: "All"

State: "All"  
 Last transfer date: 6/30/99  
 SIC: "All"

\*\*\* Sales Rep Totals \*\*\*

Rep	Cust #	Customer name	City, ST Zip code		Contact 1 name				Contact 1 phone
			Quarter-1 (Jan - Mar)	Quarter-2 (Apr - Jun)	Quarter-3 (Jul - Sep)	Quarter-4 (Oct - Dec)	Total		
-----									
Sales rep: Thomas J. Finch									
1999 Sales:			568	696	0	0	0	1,264	
Cost:			154	197	0	0	0	351	
Margin:			72.8	71.7	0.0	0.0	0.0	72.2	
1998 Sales:			0	0	0	0	0	0	
Cost:			0	0	0	0	0	0	
Margin:			0.0	0.0	0.0	0.0	0.0	0.0	
1997 Sales:			0	0	0	0	0	0	
Cost:			0	0	0	0	0	0	
Margin:			0.0	0.0	0.0	0.0	0.0	0.0	

2 Customers for Thomas J. Finch

Sales rep: Jonathan Harris

1999 Sales:	163	163	0	0	326
Cost:	52	52	0	0	104
Margin:	67.8	67.8	0.0	0.0	68.1
1998 Sales:	0	0	0	0	0
Cost:	0	0	0	0	0
Margin:	0.0	0.0	0.0	0.0	0.0
1997 Sales:	0	0	0	0	0
Cost:	0	0	0	0	0
Margin:	0.0	0.0	0.0	0.0	0.0

1 Customer for Jonathan Harris

Date 06/08/1999 Time 11:57:34

XYZ Company

Report #0229 Page 0004

Q U A R T E R L Y C U S T O M E R C O M P A R A T I V E S

Customer # range: 1 to 30  
Includes customers with zero \$ sales  
Sequenced by Sales Rep, Customer

Sales territory: "All"  
Customer type: "All"  
Sales rep: "All"

State: "All"  
Last transfer date: 6/30/99  
SIC: "All"

\*\*\* Grand Totals \*\*\*

	Quarter-1 (Jan - Mar)	Quarter-2 (Apr - Jun)	Quarter-3 (Jul - Sep)	Quarter-4 (Oct - Dec)	Total
1999 Sales:	731	859	0	0	1,590
Cost:	206	249	0	0	455
Margin:	71.7	70.9	0.0	0.0	71.4
1998 Sales:	0	0	0	0	0
Cost:	0	0	0	0	0
Margin:	0.0	0.0	0.0	0.0	0.0
1997 Sales:	0	0	0	0	0
Cost:	0	0	0	0	0
Margin:	0.0	0.0	0.0	0.0	0.0

Report total: 3 Customers

-- End of report --

# YEARLY CUSTOMER COMPARATIVES

Date 06/08/1999 Time 12:02:40

XYZ Company

Report #0230 Page 0001

## YEARLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 6/30/99  
 Sequenced by: Sales amount SIC: "All" Sort year: 1999  
 Spaces in a column indicate no customer activity Sales rep: "All"

Customer-#	Customer name Customer address Contact/Phone number	Rep Ter Type/SIC	---FY 1999---	---FY 1998---	---FY 1997---
			Sales Costs Margin %	Sales Costs Margin %	Sales Costs Margin %
40	Washington, Mrs. Thomas Dallas, TX 75201 USA Ann Washington 617-444-7780	1 RET	1,988 750 62.3		
200	21st Century Enterprises San Francisco, CA 95782 USA Lou Mandel 415-555-7844	10 RET	1,181 276 76.6		
100	Neptune Underwater Supply Santa Marina, CA 91100 USA Sam Johnson 408-776-1102	23 WSL	1,120 441 60.6		
10	Harris, Goldberg & Jones San Diego, CA 92100 USA Michael Jones 714-221-8500	1 RET	776 226 70.8		
1	Elliot Enterprises Glendale, CA 94994 USA Paul Elliot 213-779-6010	1 WSL	488 125 74.4		
50	Space Concepts & Design New York, NY 10052 USA Mike Mallin 212-220-9981	789 RET	470 170 63.8		
30	W.J. Bjornfreg A/G Los Angeles, CA 92100 Mary Kneip 213-886-7722	20 WSL	326 105 67.8		
300	Beverly Beauty Supply Los Angeles, CA 90005 USA Angie Peters 213-778-9000	23 RET	265 54 79.7		

Date 06/08/1999 Time 12:02:40

XYZ Company

Report #0230 Page 0002

## YEARLY CUSTOMER COMPARATIVES

Customer # range: "First" to "Last" Sales territory: "All" State: "All"  
 Includes customers with zero \$ sales Customer type: "All" Last transfer date: 6/30/99  
 Sequenced by: Sales amount SIC: "All" Sort year: 1999  
 Spaces in a column indicate no customer activity Sales rep: "All"

----- FY 1999 -----		----- FY 1998 -----		----- FY 1997 -----	
# of Custs	Sales	# of Custs	Sales	# of Custs	Sales
	Costs		Costs		Costs
	Margin		Margin		Margin

Superlative	0	0	0	0	0	0
		0		0		0
		0.0		0.0		0.0
Above average	0	0	0	0	0	0
		0		0		0
		0.0		0.0		0.0
Normal	0	0	0	0	0	0
		0		0		0
		0.0		0.0		0.0
Mediocre	5	6,452	0	0	0	0
		2,075		0		0
		67.8		0.0		0.0
Poor	5	2,326	0	0	0	0
		680		0		0
		70.7		0.0		0.0
-----						
Totals:	10	8,779	0	0	0	0
		2,756		0		0
		68.6		0.0		0.0

-- End of report --

# ITEM COMPARATIVE EXCEPTION REPORT

Date 06/08/1999 Time 12:18:50

XYZ Company

Report #0231 Page 0001

I T E M C O M P A R A T I V E E X C E P T I O N R E P O R T

All items from this invoice history file successfully loaded into item comparative file.

-- End of report --

# MONTHLY ITEM COMPARATIVES

Date 06/08/1999 Time 13:34:35

XYZ Company

Report #0234 Page 0001

## MONTHLY ITEM COMPARATIVES

Item # range: 1 to 2  
 Includes items with zero \$ sales  
 Sequenced by: Sales amount in 1999

Category: "All"  
 Sub-category: "All"  
 Inventory account: "All"

Vendor: "All"  
 Last transfer date: 6/30/99  
 ABC code: "All"

Item-#	Description Cat /Sub-Cat Vendor Inventory account ABC		Jan/Feb/Mar	Apr/May/Jun	Jul/Aug/Sep	Oct/Nov/Dec	Total
1	Drill, 1/4" Power Hand	1999 Sales :	1,290.00	0.00	0.00	0.00	
		Qty-Sld:	24.00	0.00	0.00	0.00	
	TOOLS ELEC 100						
	1200-000 A						
		Sales :	0.00	6.00	0.00	0.00	
		Qty-Sld:	0.00	2.00	0.00	0.00	
		Sales :	0.00	5,343.75	0.00	0.00	6,639.75
		Qty-Sld:	0.00	99.00	0.00	0.00	
							125.00
		1998 Sales :	0.00	0.00	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.0	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.00	0.00	0.00	0.00
		Qty-Sld:	0.00	0.00	0.00	0.00	
							0.00
		1997 Sales :	0.00	0.00	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.0	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.00	0.00	0.00	0.00
		Qty-Sld:	0.00	0.00	0.00	0.00	
							0.00

Date 06/08/1999 Time 13:34:36

XYZ Company

Report #0234 Page 0002

## MONTHLY ITEM COMPARATIVES

Item # range: 1 to 2  
 Includes items with zero \$ sales  
 Sequenced by: Sales amount in 1999

Category: "All"  
 Sub-category: "All"  
 Inventory account: "All"

Vendor: "All"  
 Last transfer date: 6/30/99  
 ABC code: "All"

Item-#	Description Cat /Sub-Cat Vendor Inventory account ABC		Jan/Feb/Mar	Apr/May/Jun	Jul/Aug/Sep	Oct/Nov/Dec	Total
2	Hammer, 16 oz. Claw	1999 Sales :	185.50	0.00	0.00	0.00	
		Qty-Sld:	7.00	0.00	0.00	0.00	
	TOOLS 100						
	1200-000 A						
		Sales :	0.00	0.00	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	1,020.25	0.00	0.00	1,205.75
		Qty-Sld:	0.00	39.00	0.00	0.00	
							46.00
		1998 Sales :	0.00	0.00	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.0	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.00	0.00	0.00	0.00
		Qty-Sld:	0.00	0.00	0.00	0.00	
							0.00
		1997 Sales :	0.00	0.00	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.0	0.00	0.00	
		Qty-Sld:	0.00	0.00	0.00	0.00	
		Sales :	0.00	0.00	0.00	0.00	0.00
		Qty-Sld:	0.00	0.00	0.00	0.00	
							0.00

Date 06/08/1999 Time 13:34:36 XYZ Company Report #0234 Page 0003

MONTHLY ITEM COMPARATIVES

Item # range: 1 to 2 Category: "All" Vendor: "All"  
Includes items with zero \$ sales Sub-category: "All" Last transfer date: 6/30/99  
Sequenced by: Sales amount in 1999 Inventory account: "All" ABC code: "All"

	-----FY 1999-----	-----FY 1998-----	-----FY 1997-----
Totals:	Sales : 7,845.50	0.00	0.00
	Qty-Sld: 171.00	0.00	0.00
	#-Items: 2	2	2

-- End of report --



# FAST ANALYSIS BY CUSTOMER SALES VOLUME

Date 06/08/1999 Time 21:11:39

XYZ Company

Report #0241 Page 0001

F A S T A N A L Y S I S B Y C U S T O M E R S A L E S V O L U M E

In order by sales volume Year-to-date

Current period ending date: 06/30/99

Sales volume cut-off-level: "None"

"All" Customers requested

Cust-#	Name City,State	Type Sls-rep	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
40	Washington, Mrs. Thomas Dallas, TX	RET 1	PTD: YTD: Last-yr:	22.4 22.4 .0	365.00 365.00 .00	590.00 590.00 .00	20.2 20.2 .0	61.8 61.8 .0
200	21st Century Enterprises San Francisco, CA	RET 10	PTD: YTD: Last-yr:	13.5 13.5 .0	138.00 138.00 .00	437.70 437.70 .00	15.0 15.0 .0	76.0 76.0 .0
100	Neptune Underwater Supply Santa Marina, CA	WSL 23	PTD: YTD: Last-yr:	13.1 13.1 .0	220.90 220.90 .00	339.35 339.35 .00	11.6 11.6 .0	60.6 60.6 .0
99	Anthony Jones, Inc. Alberta, CA	RET 1	PTD: YTD: Last-yr:	13.0 13.0 .0	156.00 156.00 .00	400.00 400.00 .00	13.7 13.7 .0	71.9 71.9 .0
600	Ariel Enterprises Los Angeles, CA	RET 23	PTD: YTD: Last-yr:	12.3 12.3 .0	147.50 147.50 .00	377.50 377.50 .00	12.9 12.9 .0	71.9 71.9 .0
30	W.J. Bjornfreg A/G Los Angeles, CA	WSL 20	PTD: YTD: Last-yr:	3.8 3.8 .0	52.50 52.50 .00	110.50 110.50 .00	3.8 3.8 .0	67.8 67.8 .0
300	Beverly Beauty Supply Los Angeles, CA	RET 23	PTD: YTD: Last-yr:	3.1 3.1 .0	27.00 27.00 .00	105.95 105.95 .00	3.6 3.6 .0	79.7 79.7 .0
*401	Miscellaneous customer 15A	RET	PTD: YTD: Last-yr:	.0 .0 .0	.00 .00 .00	.00 .00 .00	.0 .0 .0	.0 .0 .0
C123	Peter Cash Portland, OR	CASH 1	PTD: YTD: Last-yr:	.0 .0 .0	.00 .00 .00	.00 .00 .00	.0 .0 .0	.0 .0 .0

Date 06/08/1999 Time 21:11:39 XYZ Company Report #0241 Page 0002

F A S T A N A L Y S I S B Y C U S T O M E R S A L E S V O L U M E

Cust-#	Name City,State	Type Sls-rep	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
12 Customers		Grand totals	PTD: YTD: Last-yr:	100.0 100.0 .0	1,346.26 1,346.26 .00	2,925.04 2,925.04 .00	100.1 100.1 .0	* 68.5 * 68.5 .0

\* - Variance Occurred Due to Rounding

-- End of report --



# FAST ANALYSIS BY CUSTOMER TYPE

Date 06/08/1999 Time 21:22:38

XYZ Company

Report #0242 Page 0001

## FAST ANALYSIS BY CUSTOMER TYPE

Current period ending date: 06/30/99

Cust Type	No	Customer Name/City,State	Sls-rep	Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
CASH	C123	Peter Cash	PTD:	.00	.0	.00	.00	.0	.0
		Portland, OR	1 YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
		Type totals	PTD:	.00	.0	.00	.00	.0	.0
			YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
RET	*401	Miscellaneous customer	PTD:	.00	.0	.00	.00	.0	.0
			15A YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
	10	Harris, Goldberg & Jones	PTD:	276.40	8.5	77.36	199.04	8.8	72.0
		San Diego, CA	1 YTD:	276.40	8.5	77.36	199.04	8.8	72.0
			Last-yr:	.00	.0	.00	.00	.0	.0
	40	Washington, Mrs. Thomas	PTD:	955.00	29.3	365.00	590.00	26.1	61.8
		Dallas, TX	1 YTD:	955.00	29.3	365.00	590.00	26.1	61.8
			Last-yr:	.00	.0	.00	.00	.0	.0
	300	Beverly Beauty Supply	PTD:	132.95	4.1	27.00	105.95	4.7	79.7
		Los Angeles, CA	23 YTD:	132.95	4.1	27.00	105.95	4.7	79.7
			Last-yr:	.00	.0	.00	.00	.0	.0
	600	Ariel Enterprises	PTD:	525.00	16.1	147.50	377.50	16.7	71.9
		Los Angeles, CA	23 YTD:	525.00	16.1	147.50	377.50	16.7	71.9
			Last-yr:	.00	.0	.00	.00	.0	.0
		Type totals	PTD:	3,256.05	100.0	995.86	2,260.19	100.0	69.4
			YTD:	3,256.05	100.0	995.86	2,260.19	100.0	69.4
			Last-yr:	.00	.0	.00	.00	.0	.0

Date 06/08/1999 Time 21:22:38

XYZ Company

Report #0242 Page 0002

## FAST ANALYSIS BY CUSTOMER TYPE

Current period ending date: 06/30/99

Cust Type	No	Customer Name/City,State	Sls-rep	Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
WSL	1	Elliot Enterprises	PTD:	292.00	28.8	77.00	215.00	32.3	73.6
		Glendale, CA	1 YTD:	292.00	28.8	77.00	215.00	32.3	73.6
			Last-yr:	.00	.0	.00	.00	.0	.0
	30	W.J. Bjornfreg A/G	PTD:	163.00	16.1	52.50	110.50	16.6	67.8
		Los Angeles, CA	20 YTD:	163.00	16.1	52.50	110.50	16.6	67.8
			Last-yr:	.00	.0	.00	.00	.0	.0

100	Neptune Underwater Supply	PTD:	560.25	55.2	220.90	339.35	51.0	60.6
	Santa Marina, CA	23 YTD:	560.25	55.2	220.90	339.35	51.0	60.6
		Last-yr:	.00	.0	.00	.00	.0	.0
Type totals PTD:			1,015.25	100.1 *	350.40	664.85	99.9 *	65.5
YTD:			1,015.25	100.1 *	350.40	664.85	99.9 *	65.5
Last-yr:			.00	.0	.00	.00	.0	.0

\* - Variance Occurred Due to Rounding

Date 06/08/1999 Time 21:22:38

XYZ Company

Report #0242 Page 0003

F A S T A N A L Y S I S B Y C U S T O M E R T Y P E

Current period ending date: 06/30/99

S U M M A R Y

Cust Type	No-of Custs	Pct-of Custs		Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
CASH	1	8.3	PTD:	.00	.0	.00	.00	.0	.0
			YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
RET	8	66.7	PTD:	3,256.05	76.2	995.86	2,260.19	77.3	69.4
			YTD:	3,256.05	76.2	995.86	2,260.19	77.3	69.4
			Last-yr:	.00	.0	.00	.00	.0	.0
WSL	3	25.0	PTD:	1,015.25	23.8	350.40	664.85	22.7	65.5
			YTD:	1,015.25	23.8	350.40	664.85	22.7	65.5
			Last-yr:	.00	.0	.00	.00	.0	.0
Grand totals:	100.0		PTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5
			YTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5
			Last-yr:	.00	.0	.00	.00	.0	.0

3 Types 12 Customers

-- End of report --

# FAST ANALYSIS - CUSTOMERS FOR AN ITEM

Date 06/08/1999 Time 22:05:18

XYZ Company

Report #0243 Page 0001

## FAST ANALYSIS - CUSTOMERS FOR AN ITEM

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

-----Customer-----			Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
#/Type	Name/City,State	Sls-rep	sold	amount	sales	sales	profit	profit	pct
-----									
Item: 1	Drill, 1/4" Power Hand								
=====									
1	Elliot Enterprises	Prd-1:	5	245.00	100.0	60.00	185.00	100.0	75.5
WSL	Glendale	CA 1							
1 customers	Grand totals	Prd-1:	5	245.00	100.0	60.00	185.00	100.0	75.5

Date 06/08/1999 Time 22:05:18

XYZ Company

Report #0243 Page 0002

## FAST ANALYSIS - CUSTOMERS FOR AN ITEM

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

-----Customer-----			Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
#/Type	Name/City,State	Sls-rep	sold	amount	sales	sales	profit	profit	pct
-----									
Item: 2	Hammer, 16 oz. Claw								
=====									
30	W.J. Bjornfreg A/G	Prd-1:	2	53.00	100.0	18.00	35.00	100.0	66.0
WSL	Los Angeles	CA 20							
1 customers	Grand totals	Prd-1:	2	53.00	100.0	18.00	35.00	100.0	66.0

Date 06/08/1999 Time 22:05:18

XYZ Company

Report #0243 Page 0003

## FAST ANALYSIS - CUSTOMERS FOR AN ITEM

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

-----Customer-----			Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
#/Type	Name/City,State	Sls-rep	sold	amount	sales	sales	profit	profit	pct
-----									
Item: 3	Wrench, 3/8" Socket Set								
=====									
1	Elliot Enterprises	Prd-1:	2	47.00	100.0	17.00	30.00	100.0	63.8
WSL	Glendale	CA 1							
1 customers	Grand totals	Prd-1:	2	47.00	100.0	17.00	30.00	100.0	63.8

FAST ANALYSIS - CUSTOMERS FOR AN ITEM

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

#/Type	Customer Name/City,State	Sls-rep	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of Margin profit	Margin pct
Item: 5 Chisel, 5 pc Set									
10 RET	Harris, Goldberg & Jone San Diego	Prd-1: CA 1	10	175.90	100.0	50.00	125.90	100.0	71.6
1 customers	Grand totals	Prd-1:	10	175.90	100.0	50.00	125.90	100.0	71.6

FAST ANALYSIS - CUSTOMERS FOR AN ITEM

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

#/Type	Customer Name/City,State	Sls-rep	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of Margin profit	Margin pct
Item: 7 Gauge, Hi-pressure									
10 RET	Harris, Goldberg & Jone San Diego	Prd-1: CA 1	4	78.00	100.0	26.36	51.64	100.0	66.2
1 customers	Grand totals	Prd-1:	4	78.00	100.0	26.36	51.64	100.0	66.2

FAST ANALYSIS - CUSTOMERS FOR AN ITEM

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

#/Type	Customer Name/City,State	Sls-rep	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of Margin profit	Margin pct
Item: 8 1" Steel Bolts									
10 RET	Harris, Goldberg & Jone San Diego	Prd-1: CA 1	50	22.50	100.0	1.00	21.50	100.0	95.6
1 customers	Grand totals	Prd-1:	50	22.50	100.0	1.00	21.50	100.0	95.6

F A S T A N A L Y S I S - C U S T O M E R S F O R A N I T E M

For the period: 01/01/99 to 01/31/99

Sales volume will be in descending order of period 1 sales volume

-----Customer-----			Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
#/Type	Name/City,State	Sls-rep	sold	amount	sales	sales		profit	pct
-----									
Item: 1000	Starter Tool Set		Kit Item						
=====									
30	W.J. Bjornfreg A/G	Prd-1:	1	110.00	100.0	34.50	75.50	100.0	68.6
WSL	Los Angeles	CA 20							
1 customers	Grand totals	Prd-1:	1	110.00	100.0	34.50	75.50	100.0	68.6

-- End of report --

# FAST ANALYSIS BY CUSTOMER

Date 06/08/1999 Time 22:09:13

XYZ Company

Report #0244 Page 0001

## F A S T A N A L Y S I S B Y C U S T O M E R

Current period ending date: 06/30/99

Cust-#	Name City, State	Type Sls-rep	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
*401	Miscellaneous customer	RET	.00	.0	.00	.00	.0	.0
		15A	.00	.0	.00	.00	.0	.0
		Last-yr:	.00	.0	.00	.00	.0	.0
1	Elliot Enterprises Glendale, CA	WSL 1	292.00	6.8	77.00	215.00	7.4	73.6
		PTD:	292.00	6.8	77.00	215.00	7.4	73.6
		YTD:	292.00	6.8	77.00	215.00	7.4	73.6
		Last-yr:	.00	.0	.00	.00	.0	.0
10	Harris, Goldberg & Jones San Diego, CA	RET 1	276.40	6.5	77.36	199.04	6.8	72.0
		PTD:	276.40	6.5	77.36	199.04	6.8	72.0
		YTD:	276.40	6.5	77.36	199.04	6.8	72.0
		Last-yr:	.00	.0	.00	.00	.0	.0
30	W.J. Bjornfreg A/G Los Angeles, CA	WSL 20	163.00	3.8	52.50	110.50	3.8	67.8
		PTD:	163.00	3.8	52.50	110.50	3.8	67.8
		YTD:	163.00	3.8	52.50	110.50	3.8	67.8
		Last-yr:	.00	.0	.00	.00	.0	.0
100	Neptune Underwater Supply Santa Marina, CA	WSL 23	560.25	13.1	220.90	339.35	11.6	60.6
		PTD:	560.25	13.1	220.90	339.35	11.6	60.6
		YTD:	560.25	13.1	220.90	339.35	11.6	60.6
		Last-yr:	.00	.0	.00	.00	.0	.0
200	21st Century Enterprises San Francisco, CA	RET 10	575.70	13.5	138.00	437.70	15.0	76.0
		PTD:	575.70	13.5	138.00	437.70	15.0	76.0
		YTD:	575.70	13.5	138.00	437.70	15.0	76.0
		Last-yr:	.00	.0	.00	.00	.0	.0
300	Beverly Beauty Supply Los Angeles, CA	RET 23	132.95	3.1	27.00	105.95	3.6	79.7
		PTD:	132.95	3.1	27.00	105.95	3.6	79.7
		YTD:	132.95	3.1	27.00	105.95	3.6	79.7
		Last-yr:	.00	.0	.00	.00	.0	.0
600	Ariel Enterprises Los Angeles, CA	RET 23	525.00	12.3	147.50	377.50	12.9	71.9
		PTD:	525.00	12.3	147.50	377.50	12.9	71.9
		YTD:	525.00	12.3	147.50	377.50	12.9	71.9
		Last-yr:	.00	.0	.00	.00	.0	.0
C123	Peter Cash Portland, OR	CASH 1	.00	.0	.00	.00	.0	.0
		PTD:	.00	.0	.00	.00	.0	.0
		YTD:	.00	.0	.00	.00	.0	.0
		Last-yr:	.00	.0	.00	.00	.0	.0

Date 06/08/1999 Time 22:09:13

XYZ Company

Report #0244 Page 0002

## F A S T A N A L Y S I S B Y C U S T O M E R

Current period ending date: 06/30/99

Cust-#	Name City, State	Type Sls-rep	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
12 Customers	Grand totals	PTD:	4,271.30	100.0	1,346.26	2,925.04	100.1 *	68.5
		YTD:	4,271.30	100.0	1,346.26	2,925.04	100.1 *	68.5
		Last-yr:	.00	.0	.00	.00	.0	.0

\* - Variance Occurred Due to Rounding

-- End of report --

# FAST ANALYSIS BY ITEM

Date 06/08/1999 Time 23:06:20

XYZ Company

Report #0245 Page 0001

## F A S T A N A L Y S I S B Y I T E M

Current period ending date: 06/30/99

Starting item #: "First"  
Ending item #: "Last"

Inventory account #: "All"  
Product cat/sub-cat: "All" / "All"

ABC class: "All"  
Warehouse: "All"

Item-#	Description		Quantity		Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
Category/Sub-cat			sold		amount	sales	sales		profit	pct
*MISC-PARTS	Miscellaneous Parts	PTD:	1	EACH	125.00	.8	13.50	111.50	1.0	89.2
MISC /		YTD:	1	EACH	125.00	.8	13.50	111.50	1.0	89.2
		Qty-returned: PTD:	0	YTD:	0					
*TEMP	Temporary Item	PTD:	0	EACH	.00	.0	.00	.00	.0	.0
		YTD:	0	EACH	.00	.0	.00	.00	.0	.0
		Qty-returned: PTD:	0	YTD:	0					
1	Drill, 1/4" Power Hand	PTD:	99	EACH	5,343.75	33.6	1,188.00	4,155.75	37.3	77.8
TOOLS / ELEC		YTD:	99	EACH	5,343.75	33.6	1,188.00	4,155.75	37.3	77.8
		Qty-returned: PTD:	0	YTD:	0					
5	Chisel, 5 pc Set	PTD:	50	EACH	870.70	5.5	250.00	620.70	5.6	71.3
TOOLS /		YTD:	50	EACH	870.70	5.5	250.00	620.70	5.6	71.3
		Qty-returned: PTD:	0	YTD:	0					
6	Motor, 2hp Submersible	PTD:	14	EACH	1,890.00	11.9	770.00	1,120.00	10.1	59.3
MECH / MTR		YTD:	14	EACH	1,890.00	11.9	770.00	1,120.00	10.1	59.3
		Qty-returned: PTD:	0	YTD:	0					
7	Gauge, Hi-pressure	PTD:	154	EACH	2,983.50	18.8	1,014.86	1,968.64	17.7	66.0
TOOLS /		YTD:	154	EACH	2,983.50	18.8	1,014.86	1,968.64	17.7	66.0
		Qty-returned: PTD:	0	YTD:	0					

Date 06/08/1999 Time 23:06:20

XYZ Company

Report #0245 Page 0002

## F A S T A N A L Y S I S B Y I T E M

Current period ending date: 06/30/99

Starting item #: "First"  
Ending item #: "Last"

Inventory account #: "All"  
Product cat/sub-cat: "All" / "All"

ABC class: "All"  
Warehouse: "All"

Item-#	Description		Quantity		Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
Category/Sub-cat			sold		amount	sales	sales		profit	pct
8	1" Steel Bolts	PTD:	49.50	CASE	222.75	1.4	9.90	212.85	1.9	95.6
		YTD:	49.50	CASE	222.75	1.4	9.90	212.85	1.9	95.6
		Qty-returned: PTD:	0	YTD:	0					
100	Extended Warranty	PTD:	0	EACH	.00	.0	.00	.00	.0	.0
	90 Day Warranty	YTD:	0	EACH	.00	.0	.00	.00	.0	.0

	Qty-returned:	PTD:	0	YTD:	0					
1000	Starter Tool Set	PTD:	6	EACH	660.00	4.2	207.00	453.00	4.1	68.6
	Kit Item	YTD:	6	EACH	660.00	4.2	207.00	453.00	4.1	68.6
	Qty-returned:	PTD:	0	YTD:	0					
12 Items	Grand totals	PTD:	501.50		15,887.15	100.1 *	4,760.26	11,126.89	100.0	70.0
		YTD:	501.50		15,887.15	100.1 *	4,760.26	11,126.89	100.0	70.0

\* - Variance Occurred Due to Rounding

-- End of report --

# FAST ANALYSIS BY ITEM CATEGORY

Date 06/08/1999 Time 23:33:32

XYZ Company

Report #0246 Page 0001

## FAST ANALYSIS BY ITEM CATEGORY

Current period ending date: 06/30/99 Inventory account #: "All"  
 Product cat/sub-cat: "All" / "All" Warehouse: "All"  
 Print order: by product category

Item-# Stk-unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
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Product category / sub-category: / "All"

*TEMP	Temporary Item	PTD: 0	.00	.0	.00	.00	.0	.0
EACH		YTD: 0	.00	.0	.00	.00	.0	.0
8	1" Steel Bolts	PTD: 49.50	222.75	25.2	9.90	212.85	32.0	95.6
CASE		YTD: 49.50	222.75	25.2	9.90	212.85	32.0	95.6
100	Extended Warranty	PTD: 0	.00	.0	.00	.00	.0	.0
EACH	90 Day Warranty	YTD: 0	.00	.0	.00	.00	.0	.0
1000	Starter Tool Set	PTD: 6	660.00	74.8	207.00	453.00	68.0	68.6
EACH	Kit Item	YTD: 6	660.00	74.8	207.00	453.00	68.0	68.6
Category totals		PTD: 55.50	882.75	100.0	216.90	665.85	100.0	75.4
		YTD: 55.50	882.75	100.0	216.90	665.85	100.0	75.4

*MISC-PARTS	Miscellaneous Parts	PTD: 1	125.00	100.0	13.50	111.50	100.0	89.2
EACH		YTD: 1	125.00	100.0	13.50	111.50	100.0	89.2
Category totals		PTD: 1	125.00	100.0	13.50	111.50	100.0	89.2
		YTD: 1	125.00	100.0	13.50	111.50	100.0	89.2

Product category / sub-category: TOOLS / "All"

1	Drill, 1/4" Power Hand	PTD: 99	5,343.75	41.1	1,188.00	4,155.75	45.0	77.8
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Date 06/08/1999 Time 23:33:32

XYZ Company

Report #0246 Page 0002

## FAST ANALYSIS BY ITEM CATEGORY

Current period ending date: 06/30/99 Inventory account #: "All"  
 Product cat/sub-cat: "All" / "All" Warehouse: "All"  
 Print order: by product category

Item-# Stk-unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
--------------------	-------------	------------------	-----------------	-----------------	------------------	--------	------------------	---------------

Product category / sub-category: TOOLS / "All"

EACH		YTD: 99	5,343.75	41.1	1,188.00	4,155.75	45.0	77.8
2	Hammer, 16 oz. Claw	PTD: 39	1,020.25	7.9	351.00	669.25	7.3	65.6
EACH		YTD: 39	1,020.25	7.9	351.00	669.25	7.3	65.6

3	Wrench, 3/8" Socket Set	PTD:	68	1,598.00	12.3	578.00	1,020.00	11.1	63.8
EACH		YTD:	68	1,598.00	12.3	578.00	1,020.00	11.1	63.8
4	Saw, 2hp 7 1/4" Circular	PTD:	21	1,173.20	9.0	378.00	795.20	8.6	67.8
EACH		YTD:	21	1,173.20	9.0	378.00	795.20	8.6	67.8
5	Chisel, 5 pc Set	PTD:	50	870.70	6.7	250.00	620.70	6.7	71.3
EACH		YTD:	50	870.70	6.7	250.00	620.70	6.7	71.3
7	Gauge, Hi-pressure	PTD:	154	2,983.50	23.0	1,014.86	1,968.64	21.3	66.0
EACH		YTD:	154	2,983.50	23.0	1,014.86	1,968.64	21.3	66.0
Category totals		PTD:	431	12,989.40	100.0	3,759.86	9,229.54	100.0	71.1
		YTD:	431	12,989.40	100.0	3,759.86	9,229.54	100.0	71.1

Date 06/08/1999 Time 23:33:32

XYZ Company

Report #0246 Page 0003

F A S T A N A L Y S I S B Y I T E M C A T E G O R Y

Current period ending date: 06/30/99 Inventory account #: "All"  
 Product cat/sub-cat: "All" / "All" Warehouse: "All"  
 Print order: by product category

S U M M A R Y										
Category	#-of items	Pct-of items		Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
	4	33.3	PTD:	55.50	882.75	5.6	216.90	665.85	6.0	75.4
			YTD:	55.50	882.75	5.6	216.90	665.85	6.0	75.4
MECH	1	8.3	PTD:	14	1,890.00	11.9	770.00	1,120.00	10.1	59.3
			YTD:	14	1,890.00	11.9	770.00	1,120.00	10.1	59.3
MISC	1	8.3	PTD:	1	125.00	.8	13.50	111.50	1.0	89.2
			YTD:	1	125.00	.8	13.50	111.50	1.0	89.2
TOOLS	6	50.0	PTD:	431	12,989.40	81.8	3,759.86	9,229.54	82.9	71.1
			YTD:	431	12,989.40	81.8	3,759.86	9,229.54	82.9	71.1
Grand totals:		99.9	PTD:	501.50	15,887.15	100.1 *	4,760.26	11,126.89	100.0	70.0
4 Categories			YTD:	501.50	15,887.15	100.1 *	4,760.26	11,126.89	100.0	70.0
12 Items										

\* - Variance Occurred Due to Rounding

-- End of report --

# FAST ANALYSIS BY ITEM SALES VOLUME

Date 06/09/1999 Time 10:29:43

XYZ Company

Report #0247 Page 0001

## FAST ANALYSIS BY ITEM SALES VOLUME

Current period ending date: 06/30/99

In order by sales volume Period-to-date

Sales volume cut-off-level: "None"

Inventory account #: "All"

Product cat/sub-cat: "All" / "All"

"All" Items requested

Warehouse: "All"

Category/Sub-cat Item-#	Description		Quantity sold		Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
1	TOOLS / ELEC Drill, 1/4" Power Hand	PTD:	99	EACH	5,343.75	33.6	1,188.00	4,155.75	37.3	77.8
		YTD:	99	EACH	5,343.75	33.6	1,188.00	4,155.75	37.3	77.8
		Qty-returned:	0	YTD:	0					
7	TOOLS / Gauge, Hi-pressure	PTD:	154	EACH	2,983.50	18.8	1,014.86	1,968.64	17.7	66.0
		YTD:	154	EACH	2,983.50	18.8	1,014.86	1,968.64	17.7	66.0
		Qty-returned:	0	YTD:	0					
6	MECH / MTR Motor, 2hp Submersible	PTD:	14	EACH	1,890.00	11.9	770.00	1,120.00	10.1	59.3
		YTD:	14	EACH	1,890.00	11.9	770.00	1,120.00	10.1	59.3
		Qty-returned:	0	YTD:	0					
1000	Starter Tool Set Kit Item	PTD:	6	EACH	660.00	4.2	207.00	453.00	4.1	68.6
		YTD:	6	EACH	660.00	4.2	207.00	453.00	4.1	68.6
		Qty-returned:	0	YTD:	0					
8	1" Steel Bolts	PTD:	49.50	CASE	222.75	1.4	9.90	212.85	1.9	95.6
		YTD:	49.50	CASE	222.75	1.4	9.90	212.85	1.9	95.6
		Qty-returned:	0	YTD:	0					

Date 06/09/1999 Time 10:29:43

XYZ Company

Report #0247 Page 0002

## FAST ANALYSIS BY ITEM SALES VOLUME

Category/Sub-cat Item-#	Description		Quantity sold		Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
*MISC-PARTS	MISC / Miscellaneous Parts	PTD:	1	EACH	125.00	.8	13.50	111.50	1.0	89.2
		YTD:	1	EACH	125.00	.8	13.50	111.50	1.0	89.2
		Qty-returned:	0	YTD:	0					
*TEMP	Temporary Item	PTD:	0	EACH	.00	.0	.00	.00	.0	.0
		YTD:	0	EACH	.00	.0	.00	.00	.0	.0
		Qty-returned:	0	YTD:	0					
100	Extended Warranty 90 Day Warranty	PTD:	0	EACH	.00	.0	.00	.00	.0	.0
		YTD:	0	EACH	.00	.0	.00	.00	.0	.0
		Qty-returned:	0	YTD:	0					

12 Items	Grand totals PTD:	501.50	15,887.15	100.1 *	4,760.26	11,126.89	100.0	70.0
	YTD:	501.50	15,887.15	100.1 *	4,760.26	11,126.89	100.0	70.0

\* - Variance Occurred Due to Rounding

-- End of report --

# FAST ANALYSIS - ITEMS FOR A CUSTOMER

Date 06/09/1999 Time 10:53:20

XYZ Company

Report #0248 Page 0001

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99

Sales volume will be in descending order of period 1 sales volume

Item-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit profit	Pct-of margin	Margin pct
Customer: 1                      Elliot Enterprises								
1	Drill, 1/4" Power Hand Prd-1:	5	245.00	83.9	60.00	185.00	86.0	75.5
EACH								
3	Wrench, 3/8" Socket Set Prd-1:	2	47.00	16.1	17.00	30.00	14.0	63.8
EACH								
2 items	Grand total Prd-1:	7	292.00	100.0	77.00	215.00	100.0	73.6

Date 06/09/1999 Time 10:53:20

XYZ Company

Report #0248 Page 0002

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99

Sales volume will be in descending order of period 1 sales volume

Item-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit profit	Pct-of margin	Margin pct
Customer: 10                      Harris, Goldberg & Jones								
5	Chisel, 5 pc Set Prd-1:	10	175.90	63.6	50.00	125.90	63.3	71.6
EACH								
7	Gauge, Hi-pressure Prd-1:	4	78.00	28.2	26.36	51.64	25.9	66.2
EACH								
8	1" Steel Bolts Prd-1:	50	22.50	8.1	1.00	21.50	10.8	95.6
CASE								
3 items	Grand total Prd-1:	64	276.40	100.0	77.36	199.04	100.0	72.0

Date 06/09/1999 Time 10:53:20

XYZ Company

Report #0248 Page 0003

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99

Sales volume will be in descending order of period 1 sales volume

Item-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
Customer: 30                      W.J. Bjornfreg A/G =====								
1000								
EACH	Starter Tool Set Kit Item	Prd-1: 1	110.00	67.5	34.50	75.50	68.3	68.6
2								
EACH	Hammer, 16 oz. Claw	Prd-1: 2	53.00	32.5	18.00	35.00	31.7	66.0
2 items	Grand total	Prd-1: 3	163.00	100.0	52.50	110.50	100.0	67.8

Date 06/09/1999 Time 10:53:20                      XYZ Company                      Report #0248 Page 0004

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

Item-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
Customer: 40                      Washington, Mrs. Thomas =====								
6								
EACH	Motor, 2hp Submersible	Prd-1: 5	675.00	70.7	275.00	400.00	67.8	59.3
4								
EACH	Saw, 2hp 7 1/4" Circular	Prd-1: 5	280.00	29.3	90.00	190.00	32.2	67.9
2 items	Grand total	Prd-1: 10	955.00	100.0	365.00	590.00	100.0	61.8

Date 06/09/1999 Time 10:53:20                      XYZ Company                      Report #0248 Page 0005

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

Item-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
Customer: 50                      Space Concepts & Design =====								
3								
EACH	Wrench, 3/8" Socket Set	Prd-1: 10	235.00	100.0	85.00	150.00	100.0	63.8

1 items                      Grand totalPrd-1:            10                      235.00 100.0                      85.00                      150.00 100.0 63.8

Date 06/09/1999 Time 10:53:20                      XYZ Company                      Report #0248 Page 0006

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

```
-----
Item-#      Description                Quantity   Sales   Pct-of   Cost-of   Profit   Pct-of   Margin
Unit        Unit                               sold      amount  sales    sales    profit   profit   pct
-----
```

Customer: 99                      Anthony Jones, Inc.  
=====

4  
EACH                      Saw, 2hp 7 1/4" Circula Prd-1:            6                      336.00 60.4                      108.00                      228.00 57.0 67.9

1  
EACH                      Drill, 1/4" Power Hand Prd-1:            4                      220.00 39.6                      48.00                      172.00 43.0 78.2

2 items                      Grand totalPrd-1:            10                      556.00 100.0                      156.00                      400.00 100.0 71.9

Date 06/09/1999 Time 10:53:20                      XYZ Company                      Report #0248 Page 0007

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

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-----
Item-#      Description                Quantity   Sales   Pct-of   Cost-of   Profit   Pct-of   Margin
Unit        Unit                               sold      amount  sales    sales    profit   profit   pct
-----
```

Customer: 100                      Neptune Underwater Supply  
=====

6  
EACH                      Motor, 2hp Submersible Prd-1:            4                      540.00 96.4                      220.00                      320.00 94.3 59.3

8  
CASE                      1" Steel Bolts                      Prd-1:            45                      20.25 3.6                      .90                      19.35 5.7 95.6

2 items                      Grand totalPrd-1:            49                      560.25 100.0                      220.90                      339.35 100.0 60.6

Date 06/09/1999 Time 10:53:20                      XYZ Company                      Report #0248 Page 0008

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

```
-----
Item-#      Description                Quantity   Sales   Pct-of   Cost-of   Profit   Pct-of   Margin
-----
```

Unit			sold	amount	sales	sales	profit	pct
-----								
Customer: 200			21st Century Enterprises					
=====								
1	Drill, 1/4" Power Hand	Prd-1:	10	550.00	90.8	120.00	430.00	91.9 78.2
EACH								
4	Saw, 2hp 7 1/4" Circula	Prd-1:	1	56.00	9.2	18.00	38.00	8.1 67.9
EACH								
2 items	Grand total	Prd-1:	11	606.00	100.0	138.00	468.00	100.0 77.2

Date 06/09/1999 Time 10:53:20 XYZ Company Report #0248 Page 0009

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

Item-#	Description		Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
Unit			sold	amount	sales	sales	profit	profit	pct
-----									
Customer: 300			Beverly Beauty Supply						
=====									
5	Chisel, 5 pc Set	Prd-1:	5	87.95	66.2	25.00	62.95	59.4	71.6
EACH									
8	1" Steel Bolts	Prd-1:	100	45.00	33.8	2.00	43.00	40.6	95.6
CASE									
2 items	Grand total	Prd-1:	105	132.95	100.0	27.00	105.95	100.0	79.7

Date 06/09/1999 Time 10:53:20 XYZ Company Report #0248 Page 0010

F A S T A N A L Y S I S - I T E M S F O R A C U S T O M E R

For the period: 01/01/99 to 03/31/99  
Sales volume will be in descending order of period 1 sales volume

Item-#	Description		Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
Unit			sold	amount	sales	sales	profit	profit	pct
-----									
Customer: 600			Ariel Enterprises						
=====									
1	Drill, 1/4" Power Hand	Prd-1:	5	275.00	52.4	60.00	215.00	57.0	78.2
EACH									
2	Hammer, 16 oz. Claw	Prd-1:	5	132.50	25.2	45.00	87.50	23.2	66.0
EACH									

3									
EACH	Wrench, 3/8" Socket Set Prd-1:	5	117.50	22.4	42.50	75.00	19.9	63.8	
3 items	Grand totalPrd-1:	15	525.00	100.0	147.50	377.50	100.0	71.9	

-- End of report --

# FAST ANALYSIS BY ACTUAL SALES REP

Date 06/09/1999 Time 11:07:34

XYZ Company

Report #0249 Page 0001

F A S T A N A L Y S I S B Y A C T U A L S A L E S R E P

Current period ending date: 06/30/99

	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct	Commission	Comm-% of-sales
-----								
Sales Rep #: 1	Name: Thomas J. Finch							
PTD:	2,079.40	48.7	675.36	1,404.04	48.0	67.5	117.00	5.6
YTD:	2,079.40	48.7	675.36	1,404.04	48.0	67.5	117.00	5.6
Sales Rep #: 10	Name: William B. Wilkenson							
PTD:	575.70	13.5	138.00	437.70	15.0	76.0	22.93	4.0
YTD:	575.70	13.5	138.00	437.70	15.0	76.0	22.93	4.0
Sales Rep #: 20	Name: Jonathan Harris							
PTD:	163.00	3.8	52.50	110.50	3.8	67.8	9.78	6.0
YTD:	163.00	3.8	52.50	110.50	3.8	67.8	9.78	6.0
Sales Rep #: 15A	Name: D.W. Langford							
PTD:	.00	.0	.00	.00	.0	.0	.00	.0
YTD:	.00	.0	.00	.00	.0	.0	.00	.0
Sales Rep #: 789	Name: Avram Goldberger							
PTD:	235.00	5.5	85.00	150.00	5.1	63.8	14.10	6.0
YTD:	235.00	5.5	85.00	150.00	5.1	63.8	14.10	6.0
Sales Rep #: JAK	Name: Jack Smithson							
PTD:	.00	.0	.00	.00	.0	.0	.00	.0
YTD:	.00	.0	.00	.00	.0	.0	.00	.0
8 sls-reps	Grand totals:							

Date 06/09/1999 Time 11:07:34

XYZ Company

Report #0249 Page 0002

F A S T A N A L Y S I S B Y A C T U A L S A L E S R E P

Current period ending date: 06/30/99

	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct	Commission	Comm-% of-sales
-----								
PTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5	202.87	4.7
YTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5	202.87	4.7

-- End of report --

# FAST ANALYSIS BY ACTUAL SALES REP

Date 06/09/1999 Time 11:22:54

XYZ Company

Report #0250 Page 0001

## FAST ANALYSIS BY ACTUAL SALES REP

For periods: (1) - 01/01/99 to 01/31/99

In order by sales volume

Sales Rep range: "First" thru "Last"

-----Customer-----				Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
No	Name/City,State	Type		amount	sales	sales	amount	profit	pct
				Sales Rep: 1 Thomas J. Finch					
40	Washington, Mrs. Thomas Dallas TX	RET Prd-1:		955.00	38.1	365.00	590.00	38.1	.0
10	Harris, Goldberg & Jones San Diego CA	RET Prd-1:		703.90	28.1	77.36	626.54	28.1	.0
99	Anthony Jones, Inc. Alberta CA	RET Prd-1:		556.00	22.2	156.00	400.00	22.2	.0
1	Elliot Enterprises Glendale CA	WSL Prd-1:		292.00	11.6	77.00	215.00	11.6	.0
4 customers	Grand totals	Prd-1:		2,506.90	100.0	675.36	1,831.54	100.0	73.1

Sales Rep: 20 Jonathan Harris

30	W.J. Bjornfreg A/G Los Angeles CA	WSL Prd-1:		163.00	100.0	52.50	110.50	100.0	.0
----	--------------------------------------	------------	--	--------	-------	-------	--------	-------	----

Date 06/09/1999 Time 11:22:54

XYZ Company

Report #0250 Page 0002

## FAST ANALYSIS BY ACTUAL SALES REP

For periods: (1) - 01/01/99 to 01/31/99

In order by sales volume

Sales Rep range: "First" thru "Last"

-----Customer-----				Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
No	Name/City,State	Type		amount	sales	sales	amount	profit	pct
				Sales Rep: 20 Jonathan Harris (Continued)					
1 customers	Grand totals	Prd-1:		163.00	100.0	52.50	110.50	100.0	67.8

Sales Rep: 23 Margaret Rockwell

300	Beverly Beauty Supply Los Angeles CA	RET	Prd-1:	987.95	40.2	27.00	960.95	40.2	.0
100	Neptune Underwater Supply Santa Marina CA	WSL	Prd-1:	945.00	38.4	220.90	724.10	38.4	.0
600	Ariel Enterprises Los Angeles CA	RET	Prd-1:	525.00	21.4	147.50	377.50	21.4	.0
3 customers	Grand totals		Prd-1:	2,457.95	100.0	395.40	2,062.55	100.0	83.9

Sales Rep: 789 Avram Goldberger

50	Space Concepts & Design New York NY	RET	Prd-1:	235.00	100.0	85.00	150.00	100.0	.0
1 customers	Grand totals		Prd-1:	235.00	100.0	85.00	150.00	100.0	63.8

-- End of report --

# FAST ANALYSIS BY RESPONSIBLE SALES REP

Date 06/09/1999 Time 11:28:20

XYZ Company

Report #0251 Page 0001

## FAST ANALYSIS BY RESPONSIBLE SALES REP

Current period ending date: 06/30/99

-----Customer-----			Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
No/type	Name/City,State			Sales	Sales		Profit	Pct
Sales Rep #: 1 Name: Thomas J. Finch								
1	Elliot Enterprises	PTD:	292.00	14.0	77.00	215.00	15.3	73.6
WSL	Glendale, CA	YTD:	292.00	14.0	77.00	215.00	15.3	73.6
		Last-yr:	.00	.0	.00	.00	.0	.0
10	Harris, Goldberg & Jones	PTD:	276.40	13.3	77.36	199.04	14.2	72.0
RET	San Diego, CA	YTD:	276.40	13.3	77.36	199.04	14.2	72.0
		Last-yr:	.00	.0	.00	.00	.0	.0
40	Washington, Mrs. Thomas	PTD:	955.00	45.9	365.00	590.00	42.0	61.8
RET	Dallas, TX	YTD:	955.00	45.9	365.00	590.00	42.0	61.8
		Last-yr:	.00	.0	.00	.00	.0	.0
99	Anthony Jones, Inc.	PTD:	556.00	26.7	156.00	400.00	28.5	71.9
RET	Alberta, CA	YTD:	556.00	26.7	156.00	400.00	28.5	71.9
		Last-yr:	.00	.0	.00	.00	.0	.0
C123	Peter Cash	PTD:	.00	.0	.00	.00	.0	.0
CASH	Portland, OR	YTD:	.00	.0	.00	.00	.0	.0
		Last-yr:	.00	.0	.00	.00	.0	.0
Sales Rep totals			PTD:	2,079.40	99.9 *	675.36	1,404.04	100.0
			YTD:	2,079.40	99.9 *	675.36	1,404.04	100.0
			Last-yr:	.00	.0	.00	.00	.0

\* - Variance Occurred Due to Rounding

Date 06/09/1999 Time 11:28:20

XYZ Company

Report #0251 Page 0002

## FAST ANALYSIS BY RESPONSIBLE SALES REP

Current period ending date: 06/30/99

-----Customer-----			Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
No/type	Name/City,State			Sales	Sales		Profit	Pct
Sales Rep #: 20 Name: Jonathan Harris								
30	W.J. Bjornfreg A/G	PTD:	163.00	100.0	52.50	110.50	100.0	67.8
WSL	Los Angeles, CA	YTD:	163.00	100.0	52.50	110.50	100.0	67.8
		Last-yr:	.00	.0	.00	.00	.0	.0
Sales Rep totals			PTD:	163.00	100.0	52.50	110.50	100.0
			YTD:	163.00	100.0	52.50	110.50	100.0
			Last-yr:	.00	.0	.00	.00	.0

Sales Rep #: 23 Name: Margaret Rockwell

100	Neptune Underwater Supply	PTD:	560.25	46.0	220.90	339.35	41.2	60.6
-----	---------------------------	------	--------	------	--------	--------	------	------

WSL	Santa Marina, CA	YTD:	560.25	46.0	220.90	339.35	41.2	60.6
		Last-yr:	.00	.0	.00	.00	.0	.0
300	Beverly Beauty Supply	PTD:	132.95	10.9	27.00	105.95	12.9	79.7
RET	Los Angeles, CA	YTD:	132.95	10.9	27.00	105.95	12.9	79.7
		Last-yr:	.00	.0	.00	.00	.0	.0
600	Ariel Enterprises	PTD:	525.00	43.1	147.50	377.50	45.9	71.9
RET	Los Angeles, CA	YTD:	525.00	43.1	147.50	377.50	45.9	71.9
		Last-yr:	.00	.0	.00	.00	.0	.0
Sales Rep totals		PTD:	1,218.20	100.0	395.40	822.80	100.0	67.5
		YTD:	1,218.20	100.0	395.40	822.80	100.0	67.5
		Last-yr:	.00	.0	.00	.00	.0	.0

Sales Rep #: 15A Name: D.W. Langford

*401	Miscellaneous customer	PTD:	.00	.0	.00	.00	.0	.0
RET		YTD:	.00	.0	.00	.00	.0	.0
		Last-yr:	.00	.0	.00	.00	.0	.0
Sales Rep totals		PTD:	.00	.0	.00	.00	.0	.0
		YTD:	.00	.0	.00	.00	.0	.0
		Last-yr:	.00	.0	.00	.00	.0	.0

Date 06/09/1999 Time 11:28:20

XYZ Company

Report #0251 Page 0003

F A S T A N A L Y S I S B Y R E S P O N S I B L E S A L E S R E P

Current period ending date: 06/30/99

-----Customer-----								
No/type	Name/City,State		Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
-----								
50	Space Concepts & Design	PTD:	235.00	100.0	85.00	150.00	100.0	63.8
RET	New York, NY	YTD:	235.00	100.0	85.00	150.00	100.0	63.8
		Last-yr:	.00	.0	.00	.00	.0	.0
Sales Rep totals		PTD:	235.00	100.0	85.00	150.00	100.0	63.8
		YTD:	235.00	100.0	85.00	150.00	100.0	63.8
		Last-yr:	.00	.0	.00	.00	.0	.0

Date 06/09/1999 Time 11:28:20

XYZ Company

Report #0251 Page 0004

F A S T A N A L Y S I S B Y R E S P O N S I B L E S A L E S R E P

Current period ending date: 06/30/99

-----									
S U M M A R Y									
Sales Rep Name	No-of Custs	Pct-of Custs		Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
-----									
Thomas J. Finch	5	41.7	PTD:	2,079.40	48.7	675.36	1,404.04	48.0	67.5
1			YTD:	2,079.40	48.7	675.36	1,404.04	48.0	67.5
			Last-yr:	.00	.0	.00	.00	.0	.0
William B. Wilkenson	1	8.3	PTD:	575.70	13.5	138.00	437.70	15.0	76.0

10			YTD:	575.70	13.5	138.00	437.70	15.0	76.0	
			Last-yr:	.00	.0	.00	.00	.0	.0	
Jonathan Harris	1	8.3	PTD:	163.00	3.8	52.50	110.50	3.8	67.8	
20			YTD:	163.00	3.8	52.50	110.50	3.8	67.8	
			Last-yr:	.00	.0	.00	.00	.0	.0	
Margaret Rockwell	3	25.0	PTD:	1,218.20	28.5	395.40	822.80	28.1	67.5	
23			YTD:	1,218.20	28.5	395.40	822.80	28.1	67.5	
			Last-yr:	.00	.0	.00	.00	.0	.0	
D.W. Langford	1	8.3	PTD:	.00	.0	.00	.00	.0	.0	
15A			YTD:	.00	.0	.00	.00	.0	.0	
			Last-yr:	.00	.0	.00	.00	.0	.0	
Avram Goldberger	1	8.3	PTD:	235.00	5.5	85.00	150.00	5.1	63.8	
789			YTD:	235.00	5.5	85.00	150.00	5.1	63.8	
			Last-yr:	.00	.0	.00	.00	.0	.0	
Grand totals:	6 Sls-reps	12	99.9	PTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5
			YTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5	
			Last-yr:	.00	.0	.00	.00	.0	.0	

-- End of report --

# FAST ANALYSIS BY STATE

Date 06/09/1999 Time 11:53:25

XYZ Company

Report #0252 Page 0001

## F A S T A N A L Y S I S B Y S T A T E

Current period ending date: 06/30/99

State	Customer	Sls-rep	Type	Sales	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct	
*401	Miscellaneous customer		RET	PTD:	.00	.0	.00	.00	.0	.0
		15A		YTD:	.00	.0	.00	.00	.0	.0
				Last-yr:	.00	.0	.00	.00	.0	.0
	State totals			PTD:	.00	.0	.00	.00	.0	.0
				YTD:	.00	.0	.00	.00	.0	.0
				Last-yr:	.00	.0	.00	.00	.0	.0
CA	1	Elliot Enterprises Glendale	WSL	PTD:	292.00	9.5	77.00	215.00	9.8	73.6
				YTD:	292.00	9.5	77.00	215.00	9.8	73.6
				Last-yr:	.00	.0	.00	.00	.0	.0
	10	Harris, Goldberg & Jones San Diego	RET	PTD:	276.40	9.0	77.36	199.04	9.1	72.0
				YTD:	276.40	9.0	77.36	199.04	9.1	72.0
				Last-yr:	.00	.0	.00	.00	.0	.0
	30	W.J. Bjornfreg A/G Los Angeles	WSL	PTD:	163.00	5.3	52.50	110.50	5.1	67.8
				YTD:	163.00	5.3	52.50	110.50	5.1	67.8
				Last-yr:	.00	.0	.00	.00	.0	.0

Date 06/09/1999 Time 11:53:26

XYZ Company

Report #0252 Page 0002

## F A S T A N A L Y S I S B Y S T A T E

Current period ending date: 06/30/99

State	Customer	Sls-rep	Type	Sales	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct	
	300	Beverly Beauty Supply Los Angeles	RET	PTD:	132.95	4.3	27.00	105.95	4.8	79.7
				YTD:	132.95	4.3	27.00	105.95	4.8	79.7
				Last-yr:	.00	.0	.00	.00	.0	.0
	600	Ariel Enterprises Los Angeles	RET	PTD:	525.00	17.0	147.50	377.50	17.3	71.9
				YTD:	525.00	17.0	147.50	377.50	17.3	71.9
				Last-yr:	.00	.0	.00	.00	.0	.0
		State totals		PTD:	3,081.30	100.0	896.26	2,185.04	99.9	70.9
				YTD:	3,081.30	100.0	896.26	2,185.04	99.9	70.9
				Last-yr:	.00	.0	.00	.00	.0	.0
NY	50	Space Concepts & Design	RET	PTD:	235.00	100.0	85.00	150.00	100.0	63.8

New York	789	YTD:	235.00	100.0	85.00	150.00	100.0	63.8
		Last-yr:	.00	.0	.00	.00	.0	.0
State totals PTD:			235.00	100.0	85.00	150.00	100.0	63.8
YTD:			235.00	100.0	85.00	150.00	100.0	63.8
Last-yr:			.00	.0	.00	.00	.0	.0

TX 40	Washington, Mrs. Thomas	RET	PTD:	955.00	100.0	365.00	590.00	100.0	61.8
	Dallas	1	YTD:	955.00	100.0	365.00	590.00	100.0	61.8
			Last-yr:	.00	.0	.00	.00	.0	.0
State totals PTD:			955.00	100.0	365.00	590.00	100.0	61.8	
YTD:			955.00	100.0	365.00	590.00	100.0	61.8	
Last-yr:			.00	.0	.00	.00	.0	.0	

Date 06/09/1999 Time 11:53:26

XYZ Company

Report #0252 Page 0003

F A S T A N A L Y S I S B Y S T A T E

Current period ending date: 06/30/99

S U M M A R Y

State	No-of Custs	Pct-of Custs		Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
	1	8.3	PTD:	.00	.0	.00	.00	.0	.0
			YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
CA	8	66.7	PTD:	3,081.30	72.1	896.26	2,185.04	74.7	70.9
			YTD:	3,081.30	72.1	896.26	2,185.04	74.7	70.9
			Last-yr:	.00	.0	.00	.00	.0	.0
NY	1	8.3	PTD:	235.00	5.5	85.00	150.00	5.1	63.8
			YTD:	235.00	5.5	85.00	150.00	5.1	63.8
			Last-yr:	.00	.0	.00	.00	.0	.0
OR	1	8.3	PTD:	.00	.0	.00	.00	.0	.0
			YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
TX	1	8.3	PTD:	955.00	22.4	365.00	590.00	20.2	61.8
			YTD:	955.00	22.4	365.00	590.00	20.2	61.8
			Last-yr:	.00	.0	.00	.00	.0	.0
Grand totals:			99.9 * PTD:	4,271.30	100.0	1,346.26	2,925.04	100.0	68.5
YTD:			4,271.30	100.0	1,346.26	2,925.04	100.0	68.5	
Last-yr:			.00	.0	.00	.00	.0	.0	

5 States 12 Customers

\* - Variance Occurred Due to Rounding

-- End of report --

# FAST ANALYSIS BY ZIP CODE

Date 06/09/1999 Time 12:01:21

XYZ Company

Report #0253 Page 0001

## F A S T A N A L Y S I S B Y Z I P C O D E

```
-----Customer-----
-----
No      Name/City      Sls-rep  Type      Sales  Pct-of  Cost-of  Profit  Pct-of  Margin
              Sls-rep  Type      sales   sales   sales   profit  profit  pct
-----
```

Zip code:

```
*401      Miscellaneous customer  RET  PTD:      .00  .0      .00      .00  .0  .0
              15A      YTD:      .00  .0      .00      .00  .0  .0
              Last-yr:  .00  .0      .00      .00  .0  .0

              Zip code totals PTD:      .00  .0      .00      .00  .0  .0
              YTD:      .00  .0      .00      .00  .0  .0
              Last-yr:      .00  .0      .00      .00  .0  .0
```

Zip code: 10052

```
50      Space Concepts & Design  RET  PTD:      235.00  100.0  85.00      150.00  100.0  63.8
              New York      789      YTD:      235.00  100.0  85.00      150.00  100.0  63.8
              Last-yr:      .00  .0      .00      .00  .0  .0

              Zip code totals PTD:      235.00  100.0  85.00      150.00  100.0  63.8
              YTD:      235.00  100.0  85.00      150.00  100.0  63.8
              Last-yr:      .00  .0      .00      .00  .0  .0

              Zip code totals PTD:      560.25  100.0  220.90      339.35  100.0  60.6
              YTD:      560.25  100.0  220.90      339.35  100.0  60.6
              Last-yr:      .00  .0      .00      .00  .0  .0
```

Zip code: 92100

```
10      Harris, Goldberg & Jones  RET  PTD:      276.40  62.9  77.36      199.04  64.3  72.0
              San Diego      1      YTD:      276.40  62.9  77.36      199.04  64.3  72.0
              Last-yr:      .00  .0      .00      .00  .0  .0

30      W.J. Bjornfreg A/G      WSL  PTD:      163.00  37.1  52.50      110.50  35.7  67.8
              Los Angeles      20      YTD:      163.00  37.1  52.50      110.50  35.7  67.8
              Last-yr:      .00  .0      .00      .00  .0  .0
```

Date 06/09/1999 Time 12:01:21

XYZ Company

Report #0253 Page 0003

## F A S T A N A L Y S I S B Y Z I P C O D E

```
-----Customer-----
-----
No      Name/City      Sls-rep  Type      Sales  Pct-of  Cost-of  Profit  Pct-of  Margin
              Sls-rep  Type      sales   sales   sales   profit  profit  pct
-----
```

Zip code: 94994

```
1      Elliot Enterprises      WSL  PTD:      292.00  100.0  77.00      215.00  100.0  73.6
              Glendale      1      YTD:      292.00  100.0  77.00      215.00  100.0  73.6
              Last-yr:      .00  .0      .00      .00  .0  .0

              Zip code totals PTD:      292.00  100.0  77.00      215.00  100.0  73.6
              YTD:      292.00  100.0  77.00      215.00  100.0  73.6
```

Last-yr: .00 .0 .00 .00 .0 .0

Zip code: 95782

200 21st Century Enterprises RET PTD: 575.70 100.0 138.00 437.70 100.0 76.0  
 San Francisco 10 YTD: 575.70 100.0 138.00 437.70 100.0 76.0  
 Last-yr: .00 .0 .00 .00 .0 .0

Zip code totals PTD: 575.70 100.0 138.00 437.70 100.0 76.0  
 YTD: 575.70 100.0 138.00 437.70 100.0 76.0  
 Last-yr: .00 .0 .00 .00 .0 .0

Zip code: 98765

C123 Peter Cash CASH PTD: .00 .0 .00 .00 .0 .0  
 Portland 1 YTD: .00 .0 .00 .00 .0 .0  
 Last-yr: .00 .0 .00 .00 .0 .0

Zip code totals PTD: .00 .0 .00 .00 .0 .0  
 YTD: .00 .0 .00 .00 .0 .0  
 Last-yr: .00 .0 .00 .00 .0 .0

Date 06/09/1999 Time 12:01:21

XYZ Company

Report #0253 Page 0004

F A S T A N A L Y S I S B Y Z I P C O D E

S U M M A R Y

Zip code	No-of Custs	Pct-of Custs		Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
	1	8.3	PTD:	.00	.0	.00	.00	.0	.0
			YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0
10052	1	8.3	PTD:	235.00	5.5	85.00	150.00	5.1	63.8
			YTD:	235.00	5.5	85.00	150.00	5.1	63.8
			Last-yr:	.00	.0	.00	.00	.0	.0
12345	1	8.3	PTD:	556.00	13.0	156.00	400.00	13.7	71.9
			YTD:	556.00	13.0	156.00	400.00	13.7	71.9
			Last-yr:	.00	.0	.00	.00	.0	.0
75201	1	8.3	PTD:	955.00	22.4	365.00	590.00	20.2	61.8
			YTD:	955.00	22.4	365.00	590.00	20.2	61.8
			Last-yr:	.00	.0	.00	.00	.0	.0
94994	1	8.3	PTD:	292.00	6.8	77.00	215.00	7.4	73.6
			YTD:	292.00	6.8	77.00	215.00	7.4	73.6
			Last-yr:	.00	.0	.00	.00	.0	.0
95782	1	8.3	PTD:	575.70	13.5	138.00	437.70	15.0	76.0
			YTD:	575.70	13.5	138.00	437.70	15.0	76.0
			Last-yr:	.00	.0	.00	.00	.0	.0
98765	1	8.3	PTD:	.00	.0	.00	.00	.0	.0
			YTD:	.00	.0	.00	.00	.0	.0
			Last-yr:	.00	.0	.00	.00	.0	.0

Date 06/09/1999 Time 12:01:21

XYZ Company

Report #0253 Page 0005

F A S T A N A L Y S I S B Y Z I P C O D E

-----  
 S U M M A R Y  
 -----

Zip code	No-of Custs	Pct-of Custs	Sales	Pct-of Sales	Cost-of Sales	Profit	Pct-of Profit	Margin Pct
Grand totals:	99.8	* PTD:	4,271.30	100.0	1,346.26	2,925.04	100.1	* 68.5
		YTD:	4,271.30	100.0	1,346.26	2,925.04	100.1	* 68.5
		Last-yr:	.00	.0	.00	.00	.0	.0

10 Zip codes            12 Customers

\* - Variance Occurred Due to Rounding

-- End of report --



-- End of report --



---

-- End of report --

# FAST ANALYSIS - CUSTOMERS FOR A SERVICE

Date 06/09/1999 Time 09:15:17

XYZ Company

Report #0218 Page 0001

## FAST ANALYSIS - CUSTOMERS FOR A SERVICE

For the period: 01/01/99 to 06/30/99

Sales volume will be in descending order of period 1 sales volume

-----Customer-----			Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
#/Type	Name/City,State	Sls-rep	sold	amount	sales	sales	profit	profit	pct
Service: 001 Primary installation			Unit: HOUR						
10	Harris, Goldberg & Jones	Prd-1	1	50.00	100.0	25.00	25.00	100.0	50.0
RET	San Diego	CA 1							
1 customers Grand totals			Prd-1	1	50.00	100.0	25.00	100.0	50.0

Date 06/09/1999 Time 09:15:17

XYZ Company

Report #0218 Page 0002

## FAST ANALYSIS - CUSTOMERS FOR A SERVICE

For the period: 01/01/99 to 06/30/99

Sales volume will be in descending order of period 1 sales volume

-----Customer-----			Quantity	Sales	Pct-of	Cost-of	Profit	Pct-of	Margin
#/Type	Name/City,State	Sls-rep	sold	amount	sales	sales	profit	profit	pct
Service: 002 1 year service and mainte nance			Unit:						
40	Washington, Mrs. Thomas	Prd-1	1	400.00	100.0	150.00	250.00	100.0	62.5
RET	Dallas	TX 1							
1 customers Grand totals			Prd-1	1	400.00	100.0	150.00	100.0	62.5

-- End of report --

# FAST ANALYSIS - SERVICES FOR A CUSTOMER

Date 06/09/1999 Time 09:24:54

XYZ Company

Report #0219 Page 0001

F A S T A N A L Y S I S - S E R V I C E S F O R A C U S T O M E R

For the period: 01/01/99 to 06/30/99

Sales volume will be in descending order of period 1 sales volume

Service-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
-----								
Customer: 10		Harris, Goldberg & Jones						
=====								
001	Primary installation	Prd-1: 1	50.00	100.0	25.00	25.00	100.0	50.0
HOOR								
1 services	Grand totals	Prd-1: 1	50.00	100.0	25.00	25.00	100.0	50.0

Date 06/09/1999 Time 09:24:54

XYZ Company

Report #0219 Page 0002

F A S T A N A L Y S I S - S E R V I C E S F O R A C U S T O M E R

For the period: 01/01/99 to 06/30/99

Sales volume will be in descending order of period 1 sales volume

Service-# Unit	Description	Quantity sold	Sales amount	Pct-of sales	Cost-of sales	Profit	Pct-of profit	Margin pct
-----								
Customer: 40		Washington, Mrs. Thomas						
=====								
002	1 year service and mainte nance	Prd-1: 1	400.00	100.0	150.00	250.00	100.0	62.5
1 services	Grand totals	Prd-1: 1	400.00	100.0	150.00	250.00	100.0	62.5

-- End of report --

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