



*Sales Analysis  
User Manual*

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1100 Boulders Parkway  
Richmond, Virginia 23225

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*Chapter 1: General Information*

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## **Purpose**

This manual provides instructions for using the Live Operations phase of the Sales Analysis application. Use this manual as a guide for performing day-to-day and monthly sales analysis procedures.

All features and options described in this manual are included in the APPX Sales Analysis application. Any modification of the software or documentation is the responsibility of the licensed software consultant who makes the modification.

## **Contents**

In addition to an overview explaining the functions of the application, this manual includes:

- Sample screen displays
- Data field characteristics
- Instructions and explanations for valid entries
- Pertinent examples
- Sample reports, lists, and inquiries

## **Other Manuals**

The APPX User Manual provides general information about starting up your system, making entries, printing, and using other features common to all APPX applications. Since the information contained in the APPX User Manual is not repeated in this or other APPX manuals, you should read it carefully before working with the system.

This manual along with the Sales Analysis System Administration manual, which provides information about the Initial Setup phase and the Recovery Processing phase, and the APPX User manual complete the set of manuals that accompany each APPX application.

For questions about the computer hardware used at your installation, refer to the manuals provided by the hardware manufacturer.

## **Phases**

The Sales Analysis application operates in three distinct phases:

- Initial Setup
- Live Operations
- Recovery Processing

Each of these phases has a specific role in processing data.

### **Initial Setup**

During Initial Setup, master files and system-maintained files can be set up, and transaction history may be entered. This information provides a basis for the Live Operations phase.

### **Live Operations**

In Live Operations, sales data, which may be transferred from Accounts Receivable, Order Entry, and Commission Accounting, provides a basis for the reports and sales inquiry available through this application.

Sales Analysis can produce a variety of reports, including:

- Salesperson Productivity
- Customer Activity
- Product Activity
- Sales By Area
- Detail Sales Analysis
- Sales History
- Sales Comparison
- Sales Percentage
- Units Percentage

Inquiry functions are available to display a variety of sales history information, including history by customer, by product, and by salesperson.

### **Recovery Processing**

As you use the Sales Analysis application, there is a certain day-to-day risk of losing data due to sudden

## 1 General Information

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power surges or outages, and other system problems. Recovery Processing is used to manually restore information to system-maintained fields and files that are normally not accessible during the Live Operations phase. Recovery Processing is provided as an aid to your software consultant and should only be accessed by your consultant or under his or her direction.

### Application Features

These features are offered in the Sales Analysis application:

- Allows optional flow-through of sales information from Accounts Receivable and Order Entry during Invoices Post, or from Commission Accounting during Commissions Post.
- Provides a variety of informative and analytical reports and inquiries regarding sales, lost sales, margins, and gross profits.

### Application Interfaces

Sales Analysis receives data from Accounts Receivable, Order Entry, Inventory Control, and Commission Accounting.

### Sales Analysis Menu

This is the primary Sales Analysis application menu. It allows you to access specific Sales Analysis submenus.

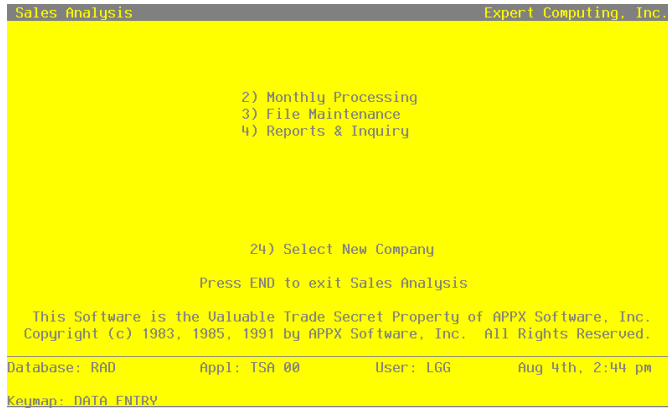


Figure 1. The Sales Analysis Menu Screen



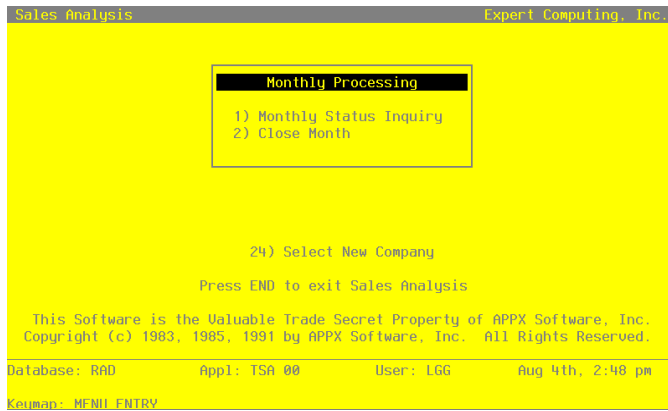
## *Chapter 2: Monthly Processing*

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## Monthly Processing

The Monthly Processing menu has a status inquiry and a monthly closing function that complete the sales analysis cycle.

Here is the Monthly Processing menu:



**Figure 2. The Monthly Processing Menu Screen**

The rest of this chapter provides explanations and samples of the Monthly Processing functions.

**Option 1 - Monthly Status**

The Monthly Status inquiry function displays status information about the current calendar month and year from the Parameters file.

A sample inquiry is shown below.

```
..... Monthly Status .....
```

```
Calendar Month/Year 08 94
```

### **Option 2 - Close Month**

During the Close Month procedure, all Sales Analysis files are prepared for the next accounting month. The system performs the following updates:

- Deletes all Sales Detail records that exceed the number of months identified on the Parameters record
- Deletes all Sales History records that exceed the number of months identified on the Parameters record
- Advances the calendar month/year in the Parameters record

Select "Close Month" from the Monthly Processing menu to run this function.

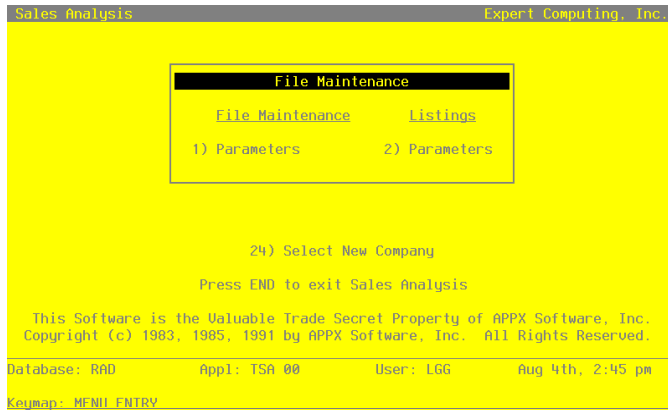
## *Chapter 3: File Maintenance*

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### File Maintenance

Sales Analysis contains only one master file — the system Parameters record. The File Maintenance function allows you to maintain and print a list of the Parameters record.

Here is the File Maintenance menu:



**Figure 3. The File Maintenance Menu**

The following pages provide a sample screen and field definitions for this File Maintenance function.

#### Option 1 - Parameters

The Parameters file defines important system-wide options and requirements that affect the operation of your application. The information in this file specifies how long detail sales and sales history information is to be stored in system-maintained files. It also includes the current calendar month and year, and the number of accounting periods in your fiscal year.

When you use this option, a record of all entries will be printed. For additions, all new field contents are printed; for deletions, the deleted record's contents are shown; for changes, both old field contents and new field contents are shown; and, in all cases, the User ID, date, and time are printed.

Select "Parameters" from the File Maintenance menu. Here is the Parameters screen:

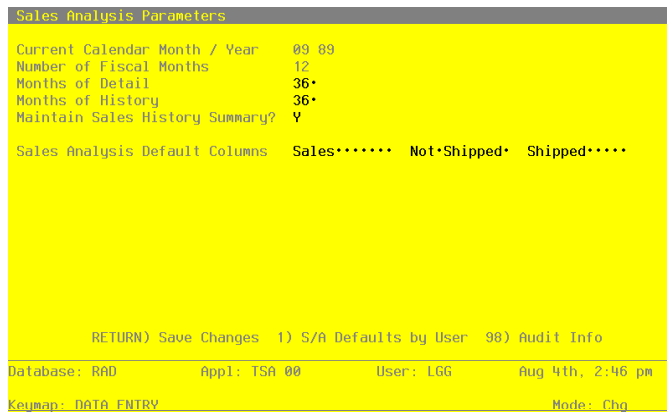


Figure 4. The Parameters Screen

Certain entries on this screen will be automatically displayed. In most cases, the displayed entry can be changed. If an asterisk (\*) appears next to one of the fields listed below, it indicates a “display only” entry, which cannot be changed.

Data items for the preceding screen are described below:

**Calendar Month/Year\***

The system displays the current calendar month and year.

**Number of Fiscal Months\***

The system displays ‘12’ or ‘13’ to specify the number of periods in the fiscal year.

**Months of Detail**

The system displays the number of months of sales detail to keep on file. This number was entered during Initial Setup; you may change it. After the system reaches this number, the detail records for the oldest month are deleted during Close Month processing. This number should be at least twice the number of fiscal months so that “last year” and “this year” history is available for reporting.

### 3 File Maintenance

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#### Months of History

The system displays the number of months of sales history to keep on file. This number was entered during Initial Setup; you may change it. After the system reaches this number, the records for the oldest month are deleted during Close Month processing. This number should be at least twice the number of fiscal months so that "last year" and "this year" history is available for reporting.

Press RETURN to save the information on this screen.

#### Option 2 - Parameters List

Option 2 prints a list of the Parameters file. A sample Parameters List is shown below.

|                                |                           |             |
|--------------------------------|---------------------------|-------------|
| 04/09/91 03:18 pm              | Expert Distributing, Inc. | KAY Page: 1 |
| Sales Analysis Parameters List |                           |             |
| -----                          |                           |             |
| Current Calendar Month / Year  | 8 89                      |             |
| Number of Fiscal Months        | 12                        |             |
| Months of Detail               | 36                        |             |
| Months of History              | 36                        |             |



## *Chapter 4: Reports and Inquiry*

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## Reports and Inquiry

Sales Analysis reports show sales detail and sales history by product, customer, salesperson, or any combination of the three. Other than data that may have been entered through Initial Setup, all information included on these reports is the result of flow-through from the other integrated applications in the system. In setting up your reports, you can both sort the information included on each report according to your needs, and select the level of detail that you want to appear.

Several inquiry functions are also available to provide on-screen displays of Sales Analysis data. These inquiries allow you to view sales history and sales history by customer, by product, and by salesperson.

The Reports and Inquiry menu is shown below:

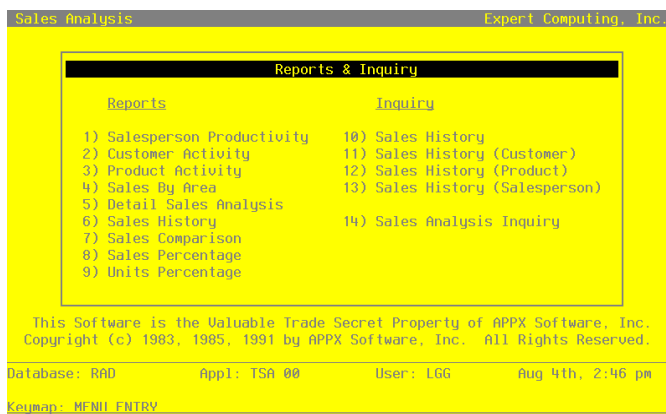
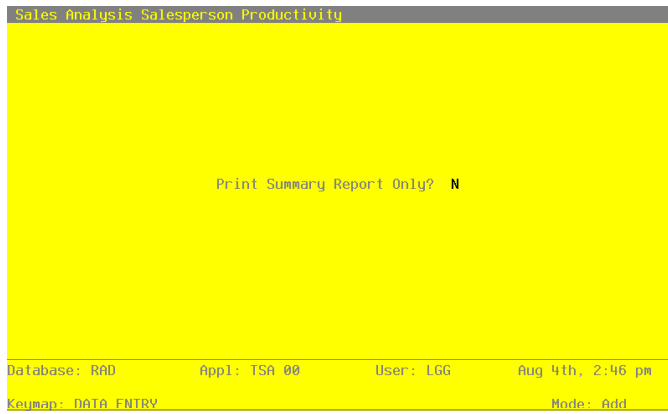


Figure 5. The Reports and Inquiry Menu

### Option 1 - Salesperson Productivity Report

This report provides sales productivity information by salesperson. This report can be printed with or without product detail.

Select "Salesperson Productivity" from the Reports and Inquiry menu. The following entry screen appears:



**Figure 6. The Salesperson Productivity Screen**

Data items for the preceding screen are described below.

**Print Summary Report Only?**

This field specifies whether or not product detail should be printed for each salesperson on the report. By default, the system displays 'N' here. You may change the display.

- Y:     Do print product detail.
- N:     Do not print product detail.

Press RETURN to save the information on this screen.

4 *Reports and Inquiry*

Here is a sample Detail Salesperson Productivity Report:

| 04/09/91 03:20 pm                             |                                | Expert Distributing, Inc. |             |              | KAY Page: 1      |  |
|---|--------------------------------|---------------------------|-------------|--------------|------------------|--|
| Detail Salesperson Productivity Report        |                                |                           |             |              |                  |  |
| Product                                       | Description                    | Total Shipped             | Total Sales | Total Margin | Total Commission |  |
| -----   |                                |                           |             |              |                  |  |
| Sales Area 10 Western United States           |                                |                           |             |              |                  |  |
| Salesperson 00000020 Mr. James V. Anthony     |                                |                           |             |              |                  |  |
| 20  | #4 12" Gold Plated Black Round | 14.00                     | 4,290.00    | 1,186.74     | 58.50            |  |
|   |                                | 9.00                      | 1,500.00    | 290.00       | 117.65           |  |
|   | -- Salesperson Totals -->      | 23.00                     | 5,790.00    | 1,476.74     | 176.15           |  |
| -----   |                                |                           |             |              |                  |  |
| Salesperson 00000010 Mr. Jarvis W. Payne      |                                |                           |             |              |                  |  |
| 10  | #10 3-1/2" White Round         | 6.00                      | 1,450.00    | 803.00       | 62.50            |  |
| 20  | #4 12" Gold Plated Black Round | 3.00                      | 1,080.00    | 210.00       | 54.00            |  |
| 30  | #56 10" Red Cylinder           | 2.00                      | 770.00      | 353.65       | 0.00             |  |
| 40  | #58 10" Yellow Cylinder        | 2.00                      | 600.00      | 211.34       | 0.00             |  |
|   | -- Salesperson Totals -->      | 16.00                     | 4,500.00    | 1,789.33     | 116.50           |  |
|   | -- Sales Area Totals -->       | 39.00                     | 10,290.00   | 3,266.07     | 292.65           |  |
| -----   |                                |                           |             |              |                  |  |
| Sales Area 20 Eastern United States           |                                |                           |             |              |                  |  |
| Salesperson 00000040 Mr. Max Woolf            |                                |                           |             |              |                  |  |
|   |                                | 1.75                      | 545.00      | 534.88       | 303.50           |  |
| 20  | #4 12" Gold Plated Black Round | 1.00                      | 290.00      | 265.00       | 290.00           |  |
|   | -- Salesperson Totals -->      | 2.75                      | 835.00      | 799.88       | 593.50           |  |
|   | -- Sales Area Totals -->       | 2.75                      | 835.00      | 799.88       | 593.50           |  |
| -----   |                                |                           |             |              |                  |  |
| Sales Area 90 Unrestricted                    |                                |                           |             |              |                  |  |
| Salesperson 00000999 House Commissions Record |                                |                           |             |              |                  |  |

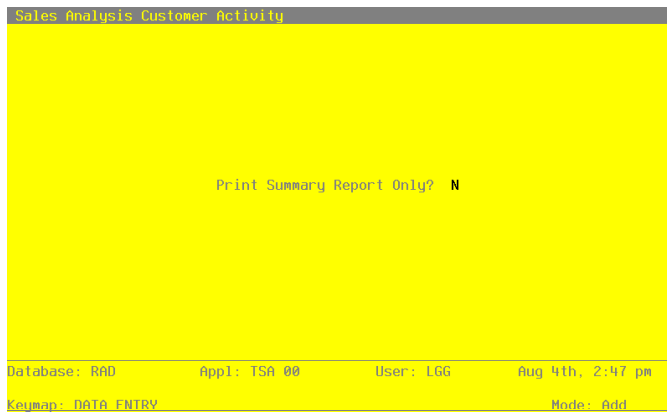
Here is a sample Summary Salesperson Productivity Report:

| Expert Distributing, Inc.               |               |             |              |                  |
|---|---------------|-------------|--------------|------------------|
| 04/09/91 03:21 pm                       |               |             |              | KAY Page: 1      |
| Summary Salesperson Productivity Report |               |             |              |                  |
| Salesperson                             | Total Shipped | Total Sales | Total Margin | Total Commission |
| =====                                   |               |             |              |                  |
| Sales Area 10 Western United States     |               |             |              |                  |
| 00000020                                | 23.00         | 5,790.00    | 1,476.74     | 176.15           |
| 00000010                                | 16.00         | 4,500.00    | 1,789.33     | 116.50           |
| -- Sales Area Totals -->                | 39.00         | 10,290.00   | 3,266.07     | 292.65           |
| =====                                   |               |             |              |                  |
| Sales Area 20 Eastern United States     |               |             |              |                  |
| 00000040                                | 2.75          | 835.00      | 799.88       | 593.50           |
| -- Sales Area Totals -->                | 2.75          | 835.00      | 799.88       | 593.50           |
| =====                                   |               |             |              |                  |
| Sales Area 30 Central United States     |               |             |              |                  |
| 00000000                                | 5.00          | 1,600.00    | 850.00       | 108.80           |
| -- Sales Area Totals -->                | 5.00          | 1,600.00    | 850.00       | 108.80           |
| =====                                   |               |             |              |                  |
| Sales Area 90 Unrestricted              |               |             |              |                  |
| 00000999                                | 0.25          | 90.00       | 86.63        | 0.00             |
| -- Sales Area Totals -->                | 0.25          | 90.00       | 86.63        | 0.00             |
| =====                                   |               |             |              |                  |
| -- Grand Totals -->                     | 47.00         | 12,815.00   | 5,002.58     | 994.95           |
| =====                                   |               |             |              |                  |

### Option 2 - Customer Activity Report

This report provides sales activity information by customer. The report can be printed with or without product detail.

Select "Customer Activity" from the Reports and Inquiry menu. The following entry screen appears:



**Figure 7. The Customer Activity Screen**

Data items for the preceding screen are described below.

#### Print Summary Report Only?

This field specifies whether or not product detail should be printed for each customer on the report. By default, the system displays 'N' here. You may change the display.

Y: Do print product detail.

N: Do not print product detail.

Press RETURN to save the information on this screen.

Here is a sample Detail Customer Activity Report:

| 04/09/91 03:23 pm                    |                                | Expert Distributing, Inc. |                   | KAY Page: 1 |              |
|--------------------------------------|--------------------------------|---------------------------|-------------------|-------------|--------------|
| Detail Customer Activity Report      |                                |                           |                   |             |              |
| Product                              | Description                    | Total Shipped             | Total Not Shipped | Total Sales | Total Margin |
| -----                                |                                |                           |                   |             |              |
| Division                             |                                |                           |                   |             |              |
| Area                                 |                                |                           |                   |             |              |
| Customer                             |                                |                           |                   |             |              |
| 20                                   | #4 12" Gold Plated Black Round | 1.00                      | 0.00              | 300.00      | 105.65       |
|                                      |                                | 0.25                      | 0.00              | 90.00       | 86.63        |
|                                      | -- Customer Totals -->         | 1.25                      | 0.00              | 390.00      | 192.28       |
|                                      |                                | -----                     | -----             | -----       | -----        |
|                                      | -- Area Totals -->             | 1.25                      | 0.00              | 390.00      | 192.28       |
|                                      |                                | -----                     | -----             | -----       | -----        |
|                                      | -- Division Totals -->         | 1.25                      | 0.00              | 390.00      | 192.28       |
|                                      |                                | -----                     | -----             | -----       | -----        |
| Division 1 Main Division             |                                |                           |                   |             |              |
| Area 1 Western Region                |                                |                           |                   |             |              |
| Customer                             |                                |                           |                   |             |              |
| 20                                   | #4 12" Gold Plated Black Round | 14.00                     | 0.00              | 4,400.00    | 1,125.00     |
|                                      |                                | 10.00                     | 0.00              | 1,775.00    | 565.00       |
|                                      | -- Customer Totals -->         | 24.00                     | 0.00              | 6,175.00    | 1,690.00     |
|                                      |                                | -----                     | -----             | -----       | -----        |
| Customer 0000030 Pool and Associates |                                |                           |                   |             |              |
| 20                                   | #4 12" Gold Plated Black Round | 2.00                      | 1.00              | 540.00      | 290.00       |
|                                      | -- Customer Totals -->         | 2.00                      | 1.00              | 540.00      | 290.00       |
|                                      |                                | -----                     | -----             | -----       | -----        |
|                                      | -- Area Totals -->             | 26.00                     | 1.00              | 6,715.00    | 1,980.00     |
|                                      |                                | -----                     | -----             | -----       | -----        |

4 *Reports and Inquiry*

Here is a sample Summary Customer Activity Report:

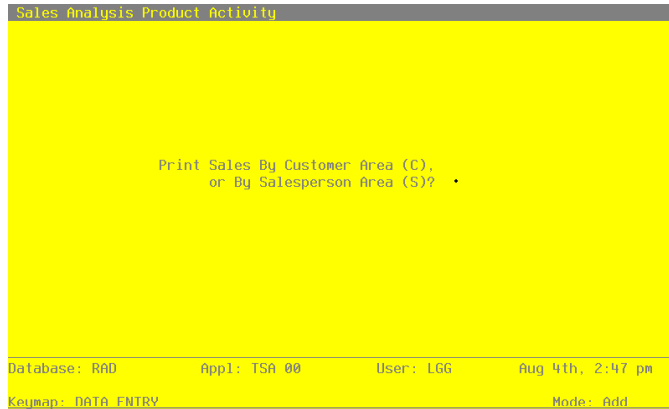
| Customer  |                        | Total Shipped | Total Not Shipped | Total Sales | Total Margin |
|---|------------------------|---------------|-------------------|-------------|--------------|
| 04/09/91 03:24 pm Expert Distributing, Inc. KAY Page: 1 |                        |               |                   |             |              |
| Summary Customer Activity Report                        |                        |               |                   |             |              |
| -----   |                        |               |                   |             |              |
| Division  |                        |               |                   |             |              |
| Area  |                        |               |                   |             |              |
|   |                        | 1.25          | 0.00              | 390.00      | 192.28       |
|   | -- Area Totals -->     | 1.25          | 0.00              | 390.00      | 192.28       |
|   |                        | -----         | -----             | -----       | -----        |
|   | -- Division Totals --> | 1.25          | 0.00              | 390.00      | 192.28       |
|   |                        | -----         | -----             | -----       | -----        |
| Division 1 Main Division                                |                        |               |                   |             |              |
| Area 1 Western Region                                   |                        |               |                   |             |              |
|   |                        | 24.00         | 0.00              | 6,175.00    | 1,690.00     |
| 00000030  | Pool and Associates    | 2.00          | 1.00              | 540.00      | 290.00       |
|   | -- Area Totals -->     | 26.00         | 1.00              | 6,715.00    | 1,980.00     |
|   |                        | -----         | -----             | -----       | -----        |
| Area 2 Southern Region                                  |                        |               |                   |             |              |
|   |                        | 4.00          | 2.00              | 1,200.00    | 422.68       |
| 00000040  | Burlington Enterprises |               |                   |             |              |
|   | -- Area Totals -->     | 4.00          | 2.00              | 1,200.00    | 422.68       |
|   |                        | -----         | -----             | -----       | -----        |
|   | -- Division Totals --> | 30.00         | 3.00              | 7,915.00    | 2,402.68     |
|   |                        | -----         | -----             | -----       | -----        |
| Division 2 Division 2                                   |                        |               |                   |             |              |
| Area 1 Western Region                                   |                        |               |                   |             |              |
|   |                        | 2.00          | 0.00              | 600.00      | 246.74       |
| 00000060  | Hale's Interiors       |               |                   |             |              |
|   | -- Area Totals -->     | 2.00          | 0.00              | 600.00      | 246.74       |
|   |                        | -----         | -----             | -----       | -----        |
| Area 2 Southern Region                                  |                        |               |                   |             |              |
|   |                        | 2.00          | 0.00              | 640.00      | 640.00       |
| 00000020  | Master Sellers Company | 2.00          | 1.00              | 470.00      | 248.00       |
|   | -- Area Totals -->     | 4.00          | 1.00              | 1,110.00    | 888.00       |
|   |                        | -----         | -----             | -----       | -----        |
|   | -- Division Totals --> | 6.00          | 1.00              | 1,710.00    | 1,134.74     |
|   |                        | -----         | -----             | -----       | -----        |
| Division 3 Division 3                                   |                        |               |                   |             |              |



**Option 3 - Product Activity Report**

This report tracks product sales activity. It may be printed by customer area (from the Accounts Receivable Customers file) or by salesperson area (from the Commission Accounting Sales Areas file).

Select "Product Activity" from the Reports and Inquiry menu. The following entry screen appears:



**Figure 8. The Product Activity Screen**

Data items for the preceding screen are described below.

**Print Sales By Customer Area (C), or By Salesperson Area (S)?**

This field specifies how you want to print the Product Activity report. You may enter either:

- C: Print data based on the customer's area.
- S: Print data based on the salesperson's area.

Press RETURN to save the information on this screen.

4 *Reports and Inquiry*

Here is a Product Activity Report by customer area:

| 04/09/91 03:28 pm        |                                | Expert Distributing, Inc. |             | KAY Page: 1 |              |
|--------------------------|--------------------------------|---------------------------|-------------|-------------|--------------|
| Product Activity Report  |                                |                           |             |             |              |
| Product                  | Description                    | Total Shipped             | Not Shipped | Total Sales | Total Margin |
| =====                    |                                |                           |             |             |              |
| Division                 |                                |                           |             |             |              |
| Area                     |                                |                           |             |             |              |
| Product Class 20         | Special Order                  |                           |             |             |              |
|                          |                                | 0.25                      | 0.00        | 90.00       | 86.63        |
|                          | -- Product Class Totals -->    | 0.25                      | 0.00        | 90.00       | 86.63        |
| =====                    |                                |                           |             |             |              |
| Product Class 30         | Custom                         |                           |             |             |              |
| 20                       | #4 12" Gold Plated Black Round | 1.00                      | 0.00        | 300.00      | 105.65       |
|                          | -- Product Class Totals -->    | 1.00                      | 0.00        | 300.00      | 105.65       |
| =====                    |                                |                           |             |             |              |
|                          | -- Area Totals -->             | 1.25                      | 0.00        | 390.00      | 192.28       |
|                          | -- Division Totals -->         | 1.25                      | 0.00        | 390.00      | 192.28       |
| =====                    |                                |                           |             |             |              |
| Division 1 Main Division |                                |                           |             |             |              |
| Area 01 Western Region   |                                |                           |             |             |              |
| Product Class            |                                |                           |             |             |              |
|                          |                                | 1.00                      | 0.00        | 275.00      | 275.00       |
|                          | -- Product Class Totals -->    | 1.00                      | 0.00        | 275.00      | 275.00       |
| =====                    |                                |                           |             |             |              |
| Product Class 10         | Standard                       |                           |             |             |              |
|                          |                                | 5.00                      | 0.00        | 60.00       | 10.00        |
|                          | -- Product Class Totals -->    | 5.00                      | 0.00        | 60.00       | 10.00        |
| =====                    |                                |                           |             |             |              |
| Product Class 20         | Special Order                  |                           |             |             |              |
|                          |                                | 4.00                      | 0.00        | 1,440.00    | 280.00       |
|                          | -- Product Class Totals -->    | 4.00                      | 0.00        | 1,440.00    | 280.00       |
| =====                    |                                |                           |             |             |              |
| Product Class 30         | Custom                         |                           |             |             |              |
| 20                       | #4 12" Gold Plated Black Round | 16.00                     | 1.00        | 4,940.00    | 1,415.00     |
|                          | -- Product Class Totals -->    | 16.00                     | 1.00        | 4,940.00    | 1,415.00     |
|                          | -- Area Totals -->             | 26.00                     | 1.00        | 6,715.00    | 1,980.00     |
| =====                    |                                |                           |             |             |              |

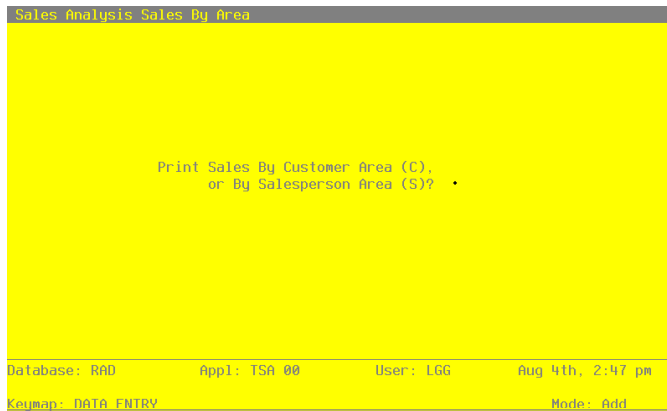
Here is a Product Activity Report by salesperson area:

| 04/09/91 03:33 pm              |                                | Expert Distributing, Inc. |             | KAY Page: 1 |              |
|--------------------------------|--------------------------------|---------------------------|-------------|-------------|--------------|
| Product Activity Report        |                                |                           |             |             |              |
| Product                        | Description                    | Total Shipped             | Not Shipped | Total Sales | Total Margin |
| =====                          |                                |                           |             |             |              |
| Area 10 Western United States  |                                |                           |             |             |              |
| Product Class 10 Standard      |                                |                           |             |             |              |
| 10                             | #10 3-1/2" White Round         | 6.00                      | 1.00        | 1,450.00    | 803.00       |
|                                |                                | 5.00                      | 0.00        | 60.00       | 10.00        |
| 20                             | #4 12" Gold Plated Black Round | 1.00                      | 0.00        | 200.00      | 103.00       |
|                                | -- Product Class Totals -->    | 12.00                     | 1.00        | 1,710.00    | 916.00       |
| =====                          |                                |                           |             |             |              |
| Product Class 20 Special Order |                                |                           |             |             |              |
|                                |                                | 7.00                      | 0.00        | 2,520.00    | 490.00       |
| 30                             | #56 10" Red Cylinder           | 2.00                      | 1.00        | 600.00      | 211.34       |
|                                | -- Product Class Totals -->    | 9.00                      | 1.00        | 3,120.00    | 701.34       |
| =====                          |                                |                           |             |             |              |
| Product Class 30 Custom        |                                |                           |             |             |              |
| 20                             | #4 12" Gold Plated Black Round | 16.00                     | 1.00        | 4,860.00    | 1,437.39     |
| 40                             | #58 10" Yellow Cylinder        | 2.00                      | 1.00        | 600.00      | 211.34       |
|                                | -- Product Class Totals -->    | 18.00                     | 2.00        | 5,460.00    | 1,648.73     |
|                                | -- Area Totals -->             | 39.00                     | 4.00        | 10,290.00   | 3,266.07     |
| =====                          |                                |                           |             |             |              |
| Area 20 Eastern United States  |                                |                           |             |             |              |
| Product Class                  |                                |                           |             |             |              |
|                                |                                | 1.00                      | 0.00        | 275.00      | 275.00       |
|                                | -- Product Class Totals -->    | 1.00                      | 0.00        | 275.00      | 275.00       |
| =====                          |                                |                           |             |             |              |
| Product Class 20 Special Order |                                |                           |             |             |              |
|                                |                                | 0.75                      | 0.00        | 270.00      | 259.88       |
|                                | -- Product Class Totals -->    | 0.75                      | 0.00        | 270.00      | 259.88       |
| =====                          |                                |                           |             |             |              |
| Product Class 30 Custom        |                                |                           |             |             |              |
| 20                             | #4 12" Gold Plated Black Round | 1.00                      | 0.00        | 290.00      | 265.00       |
|                                | -- Product Class Totals -->    | 1.00                      | 0.00        | 290.00      | 265.00       |
|                                | -- Area Totals -->             | 2.75                      | 0.00        | 835.00      | 799.88       |
| =====                          |                                |                           |             |             |              |

### Option 4 - Sales By Area Report

This report lists sales by areas. The report may be printed by customer area (from the Accounts Receivable Customers file) or by salesperson area (from the Commission Accounting Sales Areas file).

Select "Sales By Area" from the Reports and Inquiry menu. The following entry screen appears:



**Figure 9. The Sales By Area Screen**

Data items for the preceding screen are described below.

#### Print Sales By Customer Area (C), or By Salesperson Area (S)?

This field specifies how you want to print the Sales By Area report. You may enter either:

- C: Print data based on the customer's area.
- S: Print data based on the salesperson's area.

Press RETURN to save the information on this screen.

Here is sample Sales By Area Report by customer area:

| Area Description         |                        | Total Shipped | Not Shipped | Total Sales | Total Margin |
|--------------------------|------------------------|---------------|-------------|-------------|--------------|
| -----                    |                        |               |             |             |              |
| Division                 |                        |               |             |             |              |
|                          |                        | 1.25          | 0.00        | 390.00      | 192.28       |
|                          | -- Division Totals --> | 1.25          | 0.00        | 390.00      | 192.28       |
|                          |                        | -----         | -----       | -----       | -----        |
| Division 1 Main Division |                        |               |             |             |              |
| 01                       | Western Region         | 26.00         | 1.00        | 6,715.00    | 1,980.00     |
| 02                       | Southern Region        | 4.00          | 2.00        | 1,200.00    | 422.68       |
|                          | -- Division Totals --> | 30.00         | 3.00        | 7,915.00    | 2,402.68     |
|                          |                        | -----         | -----       | -----       | -----        |
| Division 2 Division 2    |                        |               |             |             |              |
| 02                       | Southern Region        | 4.00          | 1.00        | 1,110.00    | 888.00       |
| 01                       | Western Region         | 2.00          | 0.00        | 600.00      | 246.74       |
|                          | -- Division Totals --> | 6.00          | 1.00        | 1,710.00    | 1,134.74     |
|                          |                        | -----         | -----       | -----       | -----        |
| Division 3 Division 3    |                        |               |             |             |              |
| 01                       | Western Region         | 8.75          | 0.00        | 2,600.00    | 1,169.88     |
| 02                       | Southern Region        | 1.00          | 0.00        | 200.00      | 103.00       |
|                          | -- Division Totals --> | 9.75          | 0.00        | 2,800.00    | 1,272.88     |
|                          |                        | -----         | -----       | -----       | -----        |
|                          | -- Grand Totals -->    | 47.00         | 4.00        | 12,815.00   | 5,002.58     |
|                          |                        | -----         | -----       | -----       | -----        |

#### 4 Reports and Inquiry

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Here is a Sales By Area Report by salesperson area:

| 04/09/91 03:50 pm    |                       | Expert Distributing, Inc. |             | KAY Page: 1 |              |
|----------------------|-----------------------|---------------------------|-------------|-------------|--------------|
| Sales By Area Report |                       |                           |             |             |              |
| Area                 | Description           | Total Shipped             | Not Shipped | Total Sales | Total Margin |
| 10                   | Western United States | 39.00                     | 4.00        | 10,290.00   | 3,266.07     |
| 30                   | Central United States | 5.00                      | 0.00        | 1,600.00    | 850.00       |
| 20                   | Eastern United States | 2.75                      | 0.00        | 835.00      | 799.88       |
| 90                   | Unrestricted          | 0.25                      | 0.00        | 90.00       | 86.63        |
| -- Grand Totals -->  |                       | 47.00                     | 4.00        | 12,815.00   | 5,002.58     |

**Option 5 - Detail Sales Analysis Report**

This report shows line item detail from the Detail Sales holding file. Here is a sample Detail Sales Analysis report:

| Expert Distributing, Inc.                |          |       |          |                              |          |           |                       |         |            |             |      |
|--|----------|-------|----------|------------------------------|----------|-----------|-----------------------|---------|------------|-------------|------|
| Detail Sales Analysis                    |          |       |          |                              |          |           |                       |         |            | KAY Page: 1 |      |
| Month                                    | Apply To | Line  | Inv Date | Shipped                      | Not Ship | Unit Cost | Discounted Unit Price | Amount  | Commission | Sales Tax   |      |
| Customer                                 |          |       |          |                              |          |           |                       |         |            |             |      |
| Product                                  |          |       |          |                              |          |           |                       |         |            |             |      |
| Salesperson 10 Mr. Jarvis W. Payne       |          |       |          |                              |          |           |                       |         |            |             |      |
| 08                                       | 89       | 1002  | 0002     | 08/12/89                     | 3.00     | 0.00      | 290.000               | 360.000 | 1080.00    | 54.00       | 0.00 |
|  |          |       |          | -- Salesperson Subtotals --> | 3.00     | 0.00      |                       |         | 1080.00    | 54.00       | 0.00 |
| Salesperson 20 Mr. James V. Anthony      |          |       |          |                              |          |           |                       |         |            |             |      |
| 08                                       | 89       | B6704 | 0001     | 08/14/89                     | 4.00     | 0.00      | 290.000               | 360.000 | 1440.00    | 115.20      | 0.00 |
| 08                                       | 89       | B6704 | 0003     | 08/14/89                     | 5.00     | 0.00      | 10.000                | 12.000  | 60.00      | 2.45        | 0.00 |
|  |          |       |          | -- Salesperson Subtotals --> | 9.00     | 0.00      |                       |         | 1500.00    | 117.65      | 0.00 |
| Salesperson 40 Mr. Max Woolf             |          |       |          |                              |          |           |                       |         |            |             |      |
| 08                                       | 89       | 1005  | 0002     | 08/20/89                     | 1.00     | 0.00      | 0.000                 | 275.000 | 275.00     | 290.00      | 0.00 |
|  |          |       |          | -- Salesperson Subtotals --> | 1.00     | 0.00      |                       |         | 275.00     | 290.00      | 0.00 |
| Salesperson 999 House Commissions Record |          |       |          |                              |          |           |                       |         |            |             |      |
| 08                                       | 89       | 1004  | 0001     | 08/15/89                     | 0.25     | 0.00      | 13.500                | 360.000 | 90.00      | 0.00 *      | 0.00 |
|  |          |       |          | -- Salesperson Subtotals --> | 0.25     | 0.00      |                       |         | 90.00      | 0.00        | 0.00 |
|  |          |       |          | -- Product Subtotals -->     | 13.25    | 0.00      |                       |         | 2945.00    | 461.65      | 0.00 |
| Product 10 #10 3-1/2" White Round        |          |       |          |                              |          |           |                       |         |            |             |      |
| Salesperson 0                            |          |       |          |                              |          |           |                       |         |            |             |      |
| 08                                       | 89       | 3056  | 0002     | 08/12/89                     | 2.00     | 0.00      | 0.000                 | 320.000 | 640.00     | 32.00       | 0.00 |
|  |          |       |          | -- Salesperson Subtotals --> | 2.00     | 0.00      |                       |         | 640.00     | 32.00       | 0.00 |
| Salesperson 10 Mr. Jarvis W. Payne       |          |       |          |                              |          |           |                       |         |            |             |      |
| 08                                       | 89       | 1002  | 0001     | 08/12/89                     | 5.00     | 0.00      | 110.000               | 250.000 | 1250.00    | 62.50       | 0.00 |

4 **Reports and Inquiry**

**Option 6 - Sales History Report**

This report shows summary information for each combination of customer, product, salesperson, and year from the Sales History holding file. Here is a sample Sales History Report:

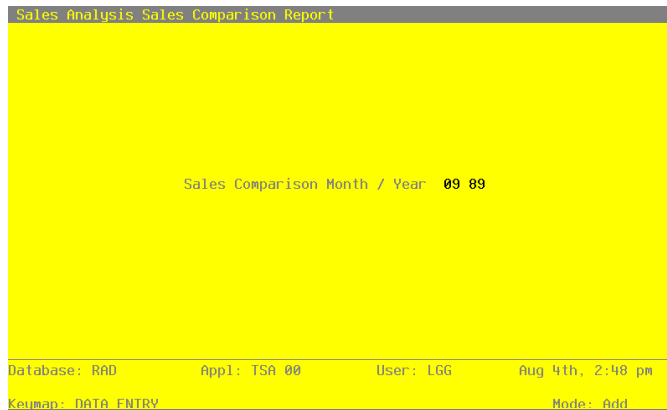
| 04/09/91 04:05 pm                        |         | Expert Distributing, Inc. |          |     |            |           |         | KAY Page: 1 |  |
|--|---------|---------------------------|----------|-----|------------|-----------|---------|-------------|--|
| Sales History Report                     |         |                           |          |     |            |           |         |             |  |
| Month                                    | Sales   | Credits                   | Costs    | GM% | Commission | Sales Tax | Shipped | Not Shipped |  |
| Customer                                 |         |                           |          |     |            |           |         |             |  |
| Product                                  |         |                           |          |     |            |           |         |             |  |
| Salesperson 10 Mr. Jarvis W. Payne       |         |                           |          |     |            |           |         |             |  |
| Year 89                                  |         |                           |          |     |            |           |         |             |  |
| 08                                       | 1350.00 | 0.00                      | 880.120  | 35  | 67.50      | 0.00      | 3.75    | 0.00        |  |
| -- Year Totals -->                       | 1350.00 | 0.00                      | 880.120  | 35  | 67.50      | 0.00      | 3.75    | 0.00        |  |
| -- Salesperson Total -->                 | 1350.00 | 0.00                      | 880.120  | 35  | 67.50      | 0.00      | 3.75    | 0.00        |  |
| Salesperson 20 Mr. James V. Anthony      |         |                           |          |     |            |           |         |             |  |
| Year 89                                  |         |                           |          |     |            |           |         |             |  |
| 08                                       | 1500.00 | 0.00                      | 1210.000 | 19  | 117.65     | 0.00      | 9.00    | 0.00        |  |
| -- Year Totals -->                       | 1500.00 | 0.00                      | 1210.000 | 19  | 117.65     | 0.00      | 9.00    | 0.00        |  |
| -- Salesperson Total -->                 | 1500.00 | 0.00                      | 1210.000 | 19  | 117.65     | 0.00      | 9.00    | 0.00        |  |
| Salesperson 40 Mr. Max Woolf             |         |                           |          |     |            |           |         |             |  |
| Year 89                                  |         |                           |          |     |            |           |         |             |  |
| 08                                       | 275.00  | 0.00                      | 0.000    | 100 | 290.00     | 0.00      | 1.00    | 0.00        |  |
| -- Year Totals -->                       | 275.00  | 0.00                      | 0.000    | 100 | 290.00     | 0.00      | 1.00    | 0.00        |  |
| -- Salesperson Total -->                 | 275.00  | 0.00                      | 0.000    | 100 | 290.00     | 0.00      | 1.00    | 0.00        |  |
| Salesperson 999 House Commissions Record |         |                           |          |     |            |           |         |             |  |
| Year 89                                  |         |                           |          |     |            |           |         |             |  |
| 08                                       | 90.00   | 0.00                      | 3.370    | 96  | 0.00       | 0.00      | 0.25    | 0.00        |  |
| -- Year Totals -->                       | 90.00   | 0.00                      | 3.370    | 96  | 0.00       | 0.00      | 0.25    | 0.00        |  |
| -- Salesperson Total -->                 | 90.00   | 0.00                      | 3.370    | 96  | 0.00       | 0.00      | 0.25    | 0.00        |  |
| -- Product Totals -->                    | 3215.00 | 0.00                      | 2093.490 | 35  | 475.15     | 0.00      | 14.00   | 0.00        |  |
| Product 10 #10 3-1/2" White Round        |         |                           |          |     |            |           |         |             |  |
| Salesperson 0                            |         |                           |          |     |            |           |         |             |  |
| Year 89                                  |         |                           |          |     |            |           |         |             |  |



### **Option 7 - Sales Comparison Report**

This report compares summarized sales history for three periods. You specify the base calendar month and year for which you want to begin the comparison, and the system defaults the corresponding sales history information (if it exists) from the previous two years and the percentage of change per annum for each item. For a particular month and year, the report compares total monthly sales and year-to-date sales for the month ending in the one you specified.

Select "Sales Comparison" from the Reports and Inquiry menu. The following entry screen appears:



**Figure 10. The Sales Comparison Report Screen**

Data items for the preceding screen are described below.

#### **Sales Comparison Month / Year**

Enter 2 digits for the calendar month and 2 digits for the calendar year to be used for the sales comparison. This month and year represent the most current month to be included on the report.

Press RETURN to save the information on this screen.

4 Reports and Inquiry

Here is a sample Sales Comparison Report:

| 04/09/91 04:08 pm                        |         | Expert Distributing, Inc. |        |        | KAY Page: 1                                   |        |      |
|--|---------|---------------------------|--------|--------|---|--------|------|
|  |         | Sales Comparison Report   |        |        |   |        |      |
|  |         | ----- Monthly Sales ----- |        |        | ----- YTD Sales For The Month Ending In ----- |        |      |
|  |         | AUG 89                    | Change | AUG 88 | Change  | AUG 87 |      |
|  |         | AUG 89                    | Change | AUG 88 | Change  | AUG 87 |      |
| Customer                                 |         |                           |        |        |   |        |      |
| Product                                  |         |                           |        |        |   |        |      |
| Salesperson 010 Mr. Jarvis W. Payne      |         |                           |        |        |   |        |      |
| Sales                                    | 1350.00 |                           | 0.00   | 0.00   | 1350.00                                       | 0.00   | 0.00 |
| Credits                                  | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Net Sales                                | 1350.00 |                           | 0.00   | 0.00   | 1350.00                                       | 0.00   | 0.00 |
| Margin                                   | 469.88  |                           | 0.00   | 0.00   | 469.88  | 0.00   | 0.00 |
| Costs                                    | 880.12  |                           | 0.00   | 0.00   | 880.12  | 0.00   | 0.00 |
| Commission                               | 67.50   |                           | 0.00   | 0.00   | 67.50   | 0.00   | 0.00 |
| Sales Tax                                | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Units Shipped                            | 3.75    |                           | 0.00   | 0.00   | 3.75  | 0.00   | 0.00 |
| Units Not Shipped                        | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Salesperson 020 Mr. James V. Anthony     |         |                           |        |        |   |        |      |
| Sales                                    | 1500.00 |                           | 0.00   | 0.00   | 1500.00                                       | 0.00   | 0.00 |
| Credits                                  | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Net Sales                                | 1500.00 |                           | 0.00   | 0.00   | 1500.00                                       | 0.00   | 0.00 |
| Margin                                   | 290.00  |                           | 0.00   | 0.00   | 290.00  | 0.00   | 0.00 |
| Costs                                    | 1210.00 |                           | 0.00   | 0.00   | 1210.00                                       | 0.00   | 0.00 |
| Commission                               | 117.65  |                           | 0.00   | 0.00   | 117.65  | 0.00   | 0.00 |
| Sales Tax                                | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Units Shipped                            | 9.00    |                           | 0.00   | 0.00   | 9.00  | 0.00   | 0.00 |
| Units Not Shipped                        | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Salesperson 040 Mr. Max Woolf            |         |                           |        |        |   |        |      |
| Sales                                    | 275.00  |                           | 0.00   | 0.00   | 275.00  | 0.00   | 0.00 |
| Credits                                  | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Net Sales                                | 275.00  |                           | 0.00   | 0.00   | 275.00  | 0.00   | 0.00 |
| Margin                                   | 275.00  |                           | 0.00   | 0.00   | 275.00  | 0.00   | 0.00 |
| Costs                                    | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Commission                               | 290.00  |                           | 0.00   | 0.00   | 290.00  | 0.00   | 0.00 |
| Sales Tax                                | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Units Shipped                            | 1.00    |                           | 0.00   | 0.00   | 1.00  | 0.00   | 0.00 |
| Units Not Shipped                        | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Salesperson 999 House Commissions Record |         |                           |        |        |   |        |      |
| Sales                                    | 90.00   |                           | 0.00   | 0.00   | 90.00   | 0.00   | 0.00 |
| Credits                                  | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Net Sales                                | 90.00   |                           | 0.00   | 0.00   | 90.00   | 0.00   | 0.00 |
| Margin                                   | 86.63   |                           | 0.00   | 0.00   | 86.63   | 0.00   | 0.00 |
| Costs                                    | 3.37    |                           | 0.00   | 0.00   | 3.37  | 0.00   | 0.00 |
| Commission                               | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Sales Tax                                | 0.00    |                           | 0.00   | 0.00   | 0.00  | 0.00   | 0.00 |
| Units Shipped                            | 0.25    |                           | 0.00   | 0.00   | 0.25  | 0.00   | 0.00 |

**Option 8 - Sales Percentage Report**

This report lists the subtotals of the net sales from the Sales History file. For each subtotal, its percentage relative to each subsequent subtotal is also printed. A grand total is provided.

Here is a sample Sales Percentage Report:

| 04/09/91 04:12 pm                         |           | Expert Distributing, Inc. |                    | KAY Page: 1            |       |
|---|-----------|---------------------------|--------------------|------------------------|-------|
| Sales Percentage Report                   |           |                           |                    |                        |       |
|   | Net Sales | Percent of Customer       | Percent of Product | Percent of Grand Total |       |
| -----                                     |           |                           |                    |                        |       |
| Product                                   |           |                           |                    |                        |       |
| Customer                                  |           |                           |                    |                        |       |
| -- Salesperson 010 Totals -->             | 1350.00   | 41.9907%                  | 41.9907%           | 3.6770%                |       |
| -- Salesperson 020 Totals -->             | 1500.00   | 46.6563%                  | 46.6563%           | 4.0855%                |       |
| -- Salesperson 040 Totals -->             | 275.00    | 8.5537%                   | 8.5537%            | 0.7490%                |       |
| -- Salesperson 999 Totals -->             | 90.00     | 2.7994%                   | 2.7994%            | 0.2451%                |       |
| -- Customer Totals -->                    | 3215.00   | 100.0000%                 | 100.0000%          | 8.7566%                | ----- |
|   | -----     |                           |                    | -----                  |       |
| -- Product Totals -->                     | 3215.00   |                           |                    | 8.7566%                | ----- |
|   | -----     |                           |                    | -----                  |       |
| Product 10 #10 3-1/2" White Round         |           |                           |                    |                        |       |
| Customer                                  |           |                           |                    |                        |       |
| -- Salesperson Totals -->                 | 640.00    | 33.8624%                  | 7.5206%            | 1.7432%                |       |
| -- Salesperson 010 Totals -->             | 1250.00   | 66.1376%                  | 14.6886%           | 3.4046%                |       |
| -- Customer Totals -->                    | 1890.00   |                           | 22.2092%           | 5.1478%                | ----- |
|   | -----     |                           | -----              | -----                  |       |
| Customer 0000030 Pool and Associates      |           |                           |                    |                        |       |
| -- Salesperson 030 Totals -->             | 6620.00   | 100.0000%                 | 77.7908%           | 18.0308%               |       |
| -- Customer 0000030 Totals -->            | 6620.00   |                           | 77.7908%           | 18.0308%               | ----- |
|   | -----     |                           | -----              | -----                  |       |
| -- Product 10 Totals -->                  | 8510.00   |                           |                    | 23.1785%               | ----- |
|   | -----     |                           |                    | -----                  |       |
| Product 20 #4 12" Gold Plated Black Round |           |                           |                    |                        |       |
| Customer                                  |           |                           |                    |                        |       |
| -- Salesperson Totals -->                 | 960.00    | 21.8182%                  | 7.1695%            | 2.6147%                |       |
| -- Salesperson 020 Totals -->             | 3150.00   | 71.5909%                  | 23.5250%           | 8.5796%                |       |
| -- Salesperson 040 Totals -->             | 290.00    | 6.5909%                   | 2.1658%            | 0.7899%                |       |
| -- Customer Totals -->                    | 4400.00   |                           | 32.8603%           | 11.9842%               | ----- |

4 *Reports and Inquiry*

**Option 9 - Units Percentage Report**

This report lists the subtotals of units shipped from the Sales History file. For each subtotal, its percentage relative to subsequent subtotals is also printed. A grand total is provided.

Here is a sample Units Percentage Report:

|   |               | Expert Distributing, Inc. |                    |                        |
|---|---------------|---------------------------|--------------------|------------------------|
|   |               | Units Percentage Report   |                    |                        |
| 04/09/91 04:16 pm                         |               | KAY Page: 1               |                    |                        |
|   | Units Shipped | Percent of Customer       | Percent of Product | Percent of Grand Total |
| -----                                     |               |                           |                    |                        |
| Product                                   |               |                           |                    |                        |
| Customer                                  |               |                           |                    |                        |
| -- Salesperson 010 Totals -->             | 3.75          | 26.7857%                  | 26.7857%           | 2.7574%                |
| -- Salesperson 020 Totals -->             | 9.00          | 64.2857%                  | 64.2857%           | 6.6176%                |
| -- Salesperson 040 Totals -->             | 1.00          | 7.1429%                   | 7.1429%            | 0.7353%                |
| -- Salesperson 999 Totals -->             | 0.25          | 1.7857%                   | 1.7857%            | 0.1838%                |
| -- Customer Totals -->                    | 14.00         | 100.0000%                 | 100.0000%          | 10.2941%               |
|   | -----         |                           | -----              | -----                  |
| -- Product Totals -->                     | 14.00         |                           |                    | 10.2941%               |
|   | -----         |                           |                    | -----                  |
| Product 10 #10 3-1/2" White Round         |               |                           |                    |                        |
| Customer                                  |               |                           |                    |                        |
| -- Salesperson Totals -->                 | 2.00          | 28.5714%                  | 6.4516%            | 1.4706%                |
| -- Salesperson 010 Totals -->             | 5.00          | 71.4286%                  | 16.1290%           | 3.6765%                |
| -- Customer Totals -->                    | 7.00          |                           | 22.5806%           | 5.1471%                |
|   | -----         |                           | -----              | -----                  |
| Customer 0000030 Pool and Associates      |               |                           |                    |                        |
| -- Salesperson 030 Totals -->             | 24.00         | 100.0000%                 | 77.4194%           | 17.6471%               |
| -- Customer 0000030 Totals -->            | 24.00         |                           | 77.4194%           | 17.6471%               |
|   | -----         |                           | -----              | -----                  |
| -- Product 10 Totals -->                  | 31.00         |                           |                    | 22.7941%               |
|   | -----         |                           |                    | -----                  |
| Product 20 #4 12" Gold Plated Black Round |               |                           |                    |                        |
| Customer                                  |               |                           |                    |                        |
| -- Salesperson Totals -->                 | 3.00          | 21.4286%                  | 5.5556%            | 2.2059%                |
| -- Salesperson 020 Totals -->             | 10.00         | 71.4286%                  | 18.5185%           | 7.3529%                |
| -- Salesperson 040 Totals -->             | 1.00          | 7.1429%                   | 1.8519%            | 0.7353%                |
| -- Customer Totals -->                    | 14.00         |                           | 25.9259%           | 10.2941%               |
|   | -----         |                           | -----              | -----                  |

**Option 10 - Sales History Inquiry**

For a given customer, product, salesperson, and year, this inquiry shows monthly totals in terms of net sales, costs, gross margin percentage, commission dollars earned, stockkeeping units shipped, and stockkeeping units not shipped.

Here is a sample Sales History Inquiry.

```

04/09/91 04:19 pm      Expert Distributing, Inc.      KAY Page: 1
Sales History Inquiry
=====
Customer 00000010 Alexander's, Inc.
Product 20 #4 12" Gold Plated Black Round
Salesperson 010 Mr. Jarvis W. Payne
Year 88
Net Sales      Costs      GM%      Commission      Shipped      Not Shipped
-----
JAN      0.00      0.000      0      0.00      0.00      0.00
FEB      0.00      0.000      0      0.00      0.00      0.00
MAR      0.00      0.000      0      0.00      0.00      0.00
APR      0.00      0.000      0      0.00      0.00      0.00
MAY      200.00      50.000      75      0.00      1.00      1.00
JUN      200.00      50.000      75      0.00      1.00      0.00
JUL      600.00      300.000      50      0.00      3.00      0.00
AUG      400.00      195.000      51      0.00      2.00      0.00
SEP      690.00      360.000      57      0.00      3.00      0.00
OCT      1610.00      700.000      57      0.00      7.00      0.00
NOV      1380.00      600.000      57      0.00      6.00      0.00
DEC      1380.00      630.000      54      0.00      6.00      0.00
BOY      0.00      0.000      0      0.00      0.00      0.00
-----
Totals      6460.00      2825.000      56      0.00      29.00      1.00

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4 *Reports and Inquiry*

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**Option 11 - Sales History (Customer) Inquiry**

For a given customer and year, this inquiry shows monthly totals in terms of net sales, costs, gross margin percentage, commission dollars earned, credits, and sales tax. Here is a sample Sales History (Customer) Inquiry.

| Expert Distributing, Inc.           |                                  |          |     |            |         |           |   |
|-------------------------------------|----------------------------------|----------|-----|------------|---------|-----------|---|
| 04/09/91 04:23 pm                   | Sales History Inquiry (Customer) |          |     |            |         | KAY Page: | 1 |
| Customer 00000010 Alexander's, Inc. |                                  |          |     |            |         |           |   |
| Year 88                             |                                  |          |     |            |         |           |   |
|                                     | Net Sales                        | Costs    | GM% | Commission | Credits | Sales Tax |   |
| JAN                                 | 0.00                             | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| FEB                                 | 0.00                             | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| MAR                                 | 0.00                             | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| APR                                 | 0.00                             | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| MAY                                 | 200.00                           | 50.000   | 75  | 0.00       | 0.00    | 12.00     |   |
| JUN                                 | 200.00                           | 50.000   | 75  | 0.00       | 0.00    | 12.00     |   |
| JUL                                 | 600.00                           | 300.000  | 50  | 0.00       | 0.00    | 36.00     |   |
| AUG                                 | 400.00                           | 195.000  | 51  | 0.00       | 0.00    | 24.00     |   |
| SEP                                 | 690.00                           | 300.000  | 57  | 0.00       | 0.00    | 41.00     |   |
| OCT                                 | 1610.00                          | 700.000  | 57  | 0.00       | 0.00    | 96.00     |   |
| NOV                                 | 1610.00                          | 705.000  | 56  | 0.00       | 0.00    | 95.00     |   |
| DEC                                 | 1380.00                          | 630.000  | 54  | 0.00       | 0.00    | 82.00     |   |
| EOY                                 | 0.00                             | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| Totals                              | 6690.00                          | 2930.000 | 56  | 0.00       | 0.00    | 398.00    |   |

**Option 12 - Sales History (Product) Inquiry**

For a given product and year, this inquiry shows monthly totals in terms of net sales, costs, gross margin percentage, commission dollars earned, stockkeeping units shipped, and stockkeeping units not shipped.

Here is a sample Sales History (Product) Inquiry.

| 04/09/91 04:26 pm                 |           | Expert Distributing, Inc. |     |            | KAY Page: 1 |             |
|-----------------------------------|-----------|---------------------------|-----|------------|-------------|-------------|
| Sales History Inquiry (Product)   |           |                           |     |            |             |             |
| Product 10 #10 3-1/2" White Round |           |                           |     |            |             |             |
| Year 88                           |           |                           |     |            |             |             |
|                                   | Net Sales | Costs                     | GM% | Commission | Shipped     | Not Shipped |
| JAN                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| FEB                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| MAR                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| APR                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| MAY                               | 540.00    | 250.000                   | 54  | 0.00       | 2.00        | 1.00        |
| JUN                               | 270.00    | 125.000                   | 54  | 0.00       | 1.00        | 0.00        |
| JUL                               | 540.00    | 250.000                   | 54  | 0.00       | 2.00        | 0.00        |
| AUG                               | 810.00    | 380.000                   | 53  | 0.00       | 3.00        | 0.00        |
| SEP                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| OCT                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| NOV                               | 1620.00   | 780.000                   | 52  | 0.00       | 6.00        | 0.00        |
| DEC                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| EOY                               | 0.00      | 0.000                     | 0   | 0.00       | 0.00        | 0.00        |
| Totals                            | 3780.00   | 1785.000                  | 53  | 0.00       | 14.00       | 1.00        |

4 Reports and Inquiry

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**Option 13 - Sales History (Salesperson) Inquiry**

For a given salesperson and year, this inquiry shows monthly totals in terms of net sales, costs, gross margin percentage, commission dollars earned, credits, and sales tax. Here is a sample Sales History (Salesperson) Inquiry.

| Expert Distributing, Inc.           |                                     |          |     |            |         |           |   |
|-------------------------------------|-------------------------------------|----------|-----|------------|---------|-----------|---|
| 04/09/91 04:28 pm                   | Sales History Inquiry (Salesperson) |          |     |            |         | KAY Page: | 1 |
| =====                               |                                     |          |     |            |         |           |   |
| Salesperson 010 Mr. Jarvis W. Payne |                                     |          |     |            |         |           |   |
| Year 88                             |                                     |          |     |            |         |           |   |
|                                     | Net Sales                           | Costs    | GM% | Commission | Credits | Sales Tax |   |
|                                     | -----                               | -----    | --- | -----      | -----   | -----     |   |
| JAN                                 | 0.00                                | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| FEB                                 | 0.00                                | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| MAR                                 | 0.00                                | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| APR                                 | 0.00                                | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| MAY                                 | 200.00                              | 50.000   | 75  | 0.00       | 0.00    | 12.00     |   |
| JUN                                 | 500.00                              | 244.330  | 51  | 0.00       | 0.00    | 12.00     |   |
| JUL                                 | 600.00                              | 300.000  | 50  | 0.00       | 0.00    | 36.00     |   |
| AUG                                 | 1300.00                             | 603.100  | 54  | 0.00       | 0.00    | 24.00     |   |
| SEP                                 | 690.00                              | 300.000  | 57  | 0.00       | 0.00    | 41.00     |   |
| OCT                                 | 2810.00                             | 1390.560 | 51  | 0.00       | 0.00    | 96.00     |   |
| NOV                                 | 3780.00                             | 1834.400 | 51  | 0.00       | 0.00    | 82.00     |   |
| DEC                                 | 4380.00                             | 2143.800 | 51  | 0.00       | 0.00    | 82.00     |   |
| EOY                                 | 0.00                                | 0.000    | 0   | 0.00       | 0.00    | 0.00      |   |
| Totals                              | 14260.00                            | 6866.190 | 52  | 0.00       | 0.00    | 385.00    |   |



### Option 14 - Sales Analysis Inquiry

This inquiry provides sales information by customer, product, salesperson, year and/or month. When you select this option, the screen shown below appears which allows you to choose how you want the sales information listed, by customer, product, salesperson, year, or month:

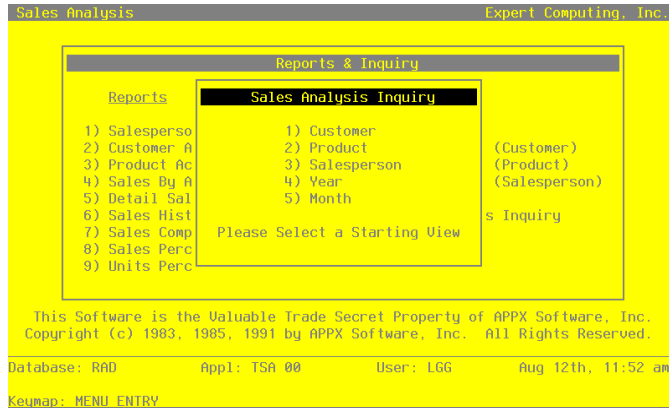


Figure 11. The Sales Analysis Inquiry

When you select an option in the Sales Analysis Inquiry overlay, a screen like the one shown below appears and provides you with sales information.

| Sales Analysis Inquiry   |         |             |         |  |
|--|---------|-------------|---------|--|
| Customer   | Sales   | Not Shipped | Shipped |  |
| (customer not entered)   | 1967    | 0           | 7       |  |
| 0000010 Alexander's, Inc.  | 24750   | 35          | 74832   |  |
| 0000020 Master Sellers Company   | 160640  | 130         | 98271   |  |
| 0000030 Pool and Associates  | 308710  | 174         | 85208   |  |
| 0000040 Burlington Enterprises   | 471570  | 383         | 101923  |  |
| 0000050 Miscellaneous Customer   | 89430   | 432         | 77778   |  |
| 0000060 Hale's Interiors   | 331460  | 673         | 118314  |  |
| 0000070 Richards & Wright, PC  | 656250  | 760         | 81728   |  |
| 0000080 Dominion Business Machines   | 924890  | 898         | 114171  |  |
| 0000090 Marsh & McLennan, Inc.   | 1467430 | 783         | 89659   |  |
| 0000100 Highland Park Variety Shop   | 2179973 | 1885        | 122254  |  |
| 0000110 Fox Technical, Inc.  | 730125  | 1648        | 119815  |  |
| 0000120 Duplex Envelope Co.  | 1127127 | 2335        | 142793  |  |
| 2) Product      3) Salesperson      4) Year      5) Month<br>RETURN) Set Columns      8) Set Print Options      9) Print |         |             |         |  |
| Database: RAD      AppI: TSA 00      User: LGG      Aug 12th, 11:53 am   |         |             |         |  |
| Keypad: DATA ENTRY      Mode: Inq  |         |             |         |  |

Figure 12. The Sales Analysis Inquiry Screen (by Customer)

The Sales Analysis Inquiry screen allows you to edit the screen several different ways. At any time, you may choose to select another category by pressing one of the other category options at the bottom of the screen. For example, if you are viewing the Sales Analysis by Customer, you can select *Product*, *Salesperson*, *Year* or *Month* options at the bottom of the screen to redisplay the data using the new category. The *Print* option at the bottom of the Sales Analysis Inquiry screen, allows you to print the inquiry. The *Set Print Options* option at the bottom of the Sales Analysis Inquiry screen provides you with a disposition screen to set your print specifications. The *Set Column* option allows you to specify the information that is displayed on the screen. When you select the *Set Column* option, the following screen appears.

| Customer                           | Sales Not Shipped | Shipped |
|------------------------------------|-------------------|---------|
| (customer not entered)             | 1967              | 0       |
| 0000010 Alexander's, Inc.          | 24750             | 35      |
| 0000020 Master Sellers Company     | 16                | 74832   |
| 0000030 Pool and Associates        | 30                |         |
| 0000040 Burlington Enterprises     | 47                |         |
| 0000050 Miscellaneous Customer     | 8                 |         |
| 0000060 Hale's Interiors           | 33                |         |
| 0000070 Richards & Wright, PC      | 65                |         |
| 0000080 Dominion Business Machines | 92                |         |
| 0000090 Marsh & McLennan, Inc.     | 148               |         |
| 0000100 Highland Park Variety Shop | 217               |         |
| 0000110 Fox Technical, Inc.        | 73                |         |
| 0000120 Duplex Envelope Co.        | 112               |         |

| Column Selection   |             |      |
|--------------------|-------------|------|
| 1                  | Sales       | 1967 |
| 2                  | Not Shipped | 0    |
| 3                  | Shipped     | 7    |
| •                  | Credits     | 0    |
| •                  | Commission  | 693  |
| •                  | Sales Tax   | 0    |
| •                  | Margin      | 1721 |
| 1) Save as Default |             |      |

2) Product      3) Salesperson

RETURN) Set Columns      8) Set Print Options      9) Print

Database: RAD      AppI: TSA 00      User: LGG      Aug 12th, 11:53 am

Keypad: DATA ENTRY      Mode: Inq

Figure 13. The Sales Analysis Inquiry Set Column Overlay

The *Set Column* overlay allows you to specify which information will be displayed in the three columns on the screen and the order that those columns will appear. Once you have selected the order and type of information you desire, you may press the *Save as Default* option if you want your data to appear in the specified order every time you use the Sales Analysis Inquiry. Press ENTER to redisplay the Sales Analysis Inquiry screen using the specifications you have provided.



APPX Software, Inc.

Sales Analysis User Manual

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