

Features and Functions: Sales Analysis Module

Overview

- * The Sales Analysis Module collects all the “Sales” information (Revenue, Cost and Quantity) by Fiscal Year and Period for 1: All Customers and Items purchased (Sold or Returned), 2: All Items (Sold and Returned) and 3: All Salespersons. From these 3 databases, several reports allow for analysis of what items were sold and when they were sold and to whom.
- * The Sales Analysis Module is designed to be a “Management Tool”. The user may use this information to plan future Sales, Inventory Levels, Services Provided etc. based on the year sales, trend analysis, seasonal numbers, yearly comparisons, etc. The data may be filtered many different ways (see below) to evaluate for planning. The sample “Report” selection screens (right →) indicate the wide range of possible data that maybe included on a report – by Customer, by inventory item or by salesperson.

Features

- * The Reports within this module have several things in common. Because of the great amount of data stored in the system, the user must determine which format is best for their purposes. The system offers reports that vertically compare Year-to-date data (Sales\$, Cost, Quantity, Profit, Weight) for “This Year”, “Last Year”, Selected Period Range, etc. and horizontally year-to-year comparisons by periods (for the same data). Certain reports allow the User to define what Year and period range is to be compared to what other Year and Period Range (The Period Range does not need to be the same).
- * The Sales Analysis Reports have several filters to limit the data analyzed. Not all filters are available on all reports. The filters include input ranges for Customer#, Item#, Customer type, Customer Price Type, Salesperson, Item Product Group, Customer Territory, Item’s Bin# and Item’s Miscellaneous Code.
- * Some of the Reports print “Margins” with the ability to limit the report to “Low Margins”.
- * Many of the reports have the option to print “Totals Only”.
- * Optional Subsystem – 52 week Sales Analysis that prints the last 16 weeks (or any 16 weeks) and calculates the Average Order Quantity, Average Time between orders, Average Usage by the Customer for the 16 weeks and for the Year-to-date. The system then shows the project next order based on the “Planning Time Frame” requested. The Report is available by Customer/ Item# and by Item#/Customer#. The “Planning” may be used for projected sales, projected purchasing or projected manufacturing. The user must define the “Weeks” starting date and it may be changed and the data recreated as often as required. Each report as several data filter ranges.

Interface to Other Modules

- * Updated from all “Sales Type” modules such Sales order, Point-of-Sales, Service, Accounts Receivable (Manual Invoices), Major Unit Rental, Moving, Transportation, Warehousing, Publishing and Major Unit Inventory Modules.