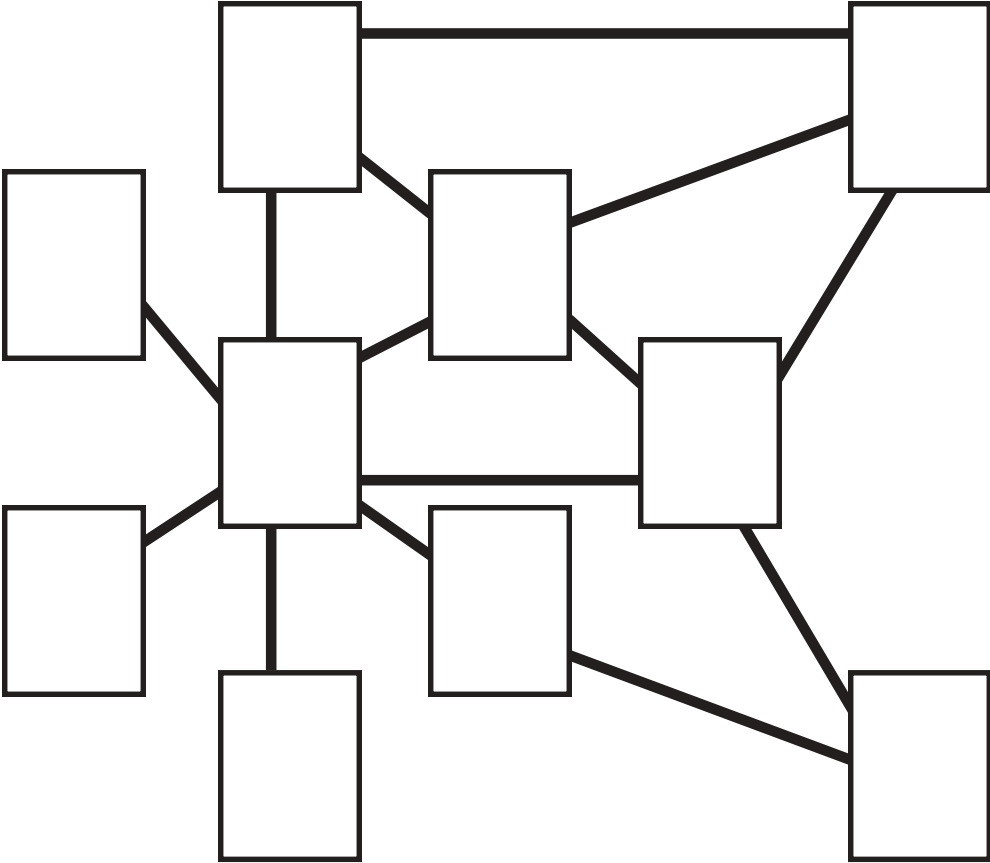


***Total Order Plus
Integrated Accounting Series
Sales Analysis***

Integrated Accounting Series



Total Order Plus Sales Analysis User Guide

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INTRODUCING THE SALES ANALYSIS SYSTEM

- Using This Guide
- Menu Structure

Using This Guide

Welcome

Since this is primarily a reference manual, we have tried to make it easy for you to find the information you need. It is important that you first read the 'Introduction' section of this manual prior to proceeding further. It will familiarize you with data input conventions using TOP, will help you to utilize 'On-Line Help', will explain printer selection, how to use the TOP menu system and how to set up user services to benefit your company.

This guide is divided into five parts:

Part 1: Introducing the Sales Analysis System

The Sales Analysis system shares information between Accounts Receivable, Order Entry and Inventory Control and provides a management tool for extensive reporting by customer, inventory items and salespersons. Salespersons commissions are calculated on either gross sales or net profit and allows you the capability to post commissions directly to the General Ledger, if applicable.

Part 2: Defining the Sales Analysis System

How to customize your system parameters, view file sizing specifications and add password protection (optional). A maintenance program is available to edit salespersons commissions by invoice and utility programs to change salespersons codes in the Customer Masterfile records.

Part 3: Operating the Sales Analysis System

The Sales Analysis System allows you to set up each salesperson code and name with percent of commission for multiple levels. You can view the invoices for each salesperson, along with the sales by customer and by inventory item. Salespersons commission amounts can also be adjusted during any period. Period-End Processing removes period-to-date sales figures and paid invoices by salesperson, if applicable.

Part 4: Sales Analysis Reporting System

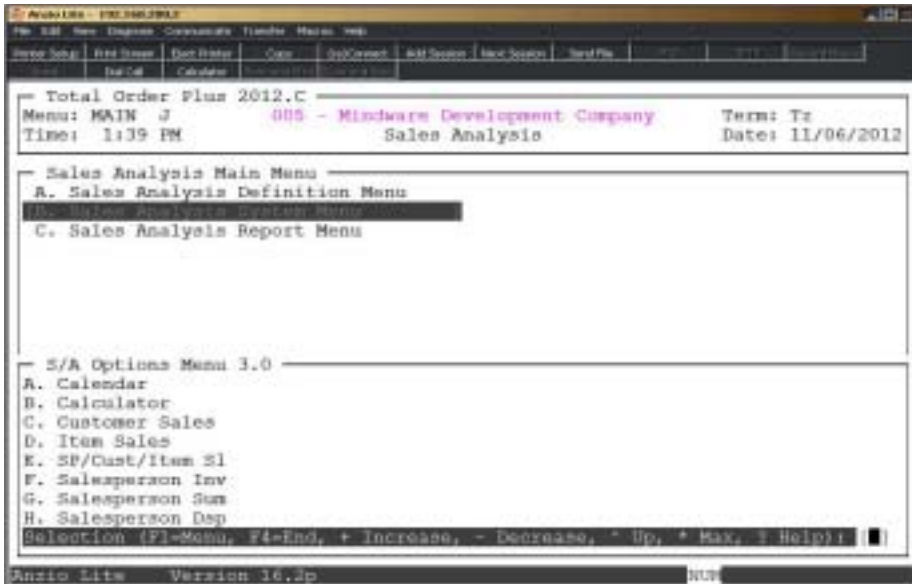
The Sales Analysis reporting system provides management reporting by salespersons, customers and inventory items in detailed and summary format. The reporting offers visual tracking of production month-to-date and year-to-date, along with customer sales dollars and profit margins and lists inventory items purchased within a current period and year-to-date.

The month-to-date and year-to-date sales information can also be viewed in the Inventory module. See 'Item Balance & Sales Display' on the Inventory Masterfile Sub-Menu. You can also add a new salesperson or edit salespersons information using Salesperson Maintenance.

Part 5: Sales Analysis Options Menu

The options menu allows you to view customer sales, item sales, salesperson by customer by item sales, salespersons invoices and salespersons sales summary. You can maintain salesperson commission levels or add new salespersons from the options menu.

Sales Analysis Menu Structure



2

DEFINING THE SALES ANALYSIS SYSTEM

- Company Maintenance**
- Sales Analysis Parameters**
- File Creation and Information**
- Salesperson Change Utility**
- 2nd Salesperson Change Utility**
- Salesperson Change By Zip Utility**
- Salesperson Weekly Summary Maintenance**
- Weekly Sales Parameter Maintenance**
- Password Maintenance**
- Sales Analysis Log Display**

Sales Analysis Definition Menu

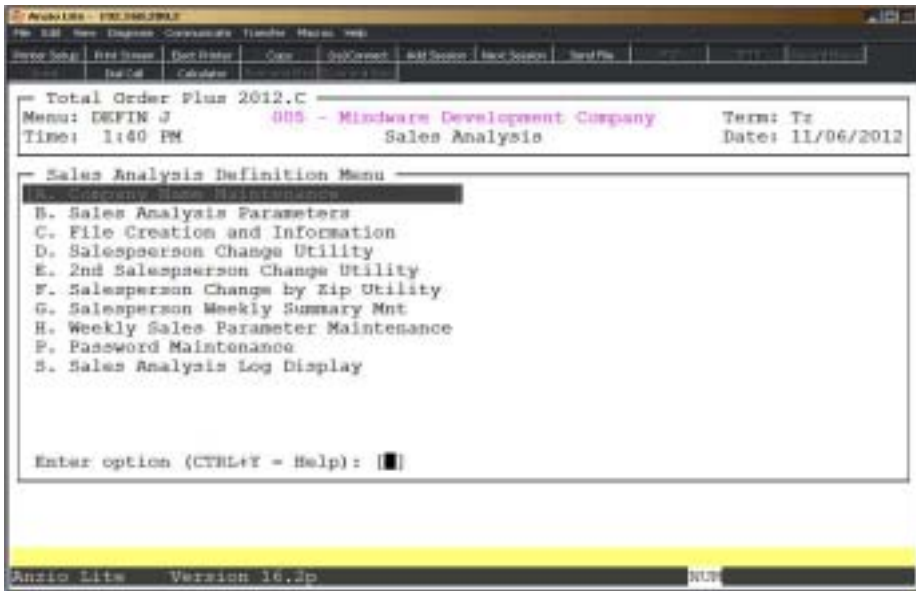
Overview

The Sales Analysis system is a reporting module for the information received from the Order Entry system. You must define your S/A system before you can perform the Daily Sales Journal & Update from the Order Entry system.

Order Entry Parameters and Inventory File Sizing have an effect on the Sales Analysis system. The following can help you set correct parameters:

- Reply the same way to 'Do You Have Salespersons?' in O/E and S/A parameters.
- You must answer Yes to 'Are You Interfaced to Sales Analysis?' in O/E parameters.
- Answer Yes to 'Interface To A/R?' in the S/A and the O/E parameters.

Note: Accounts Receivable, Inventory and Order Entry must be setup prior to defining the Sales Analysis System.



Company Name Maintenance



Procedure

1. Choose Company Name Maintenance from the Sales Analysis Definition Menu.
Press **F4** to return to the Sales Analysis Definition Menu.

Note: The division number displays on the screen. If you have multiple divisions, enter the division code to create or edit.

2. Company Name:

Type your company name up to thirty-five (35) characters and **Enter**.

Note: The company name prints on all purchase order reports and screen headings.

3. Address:

The cursor moves to the first of four address lines. You can enter up to thirty-five (35) characters on each line. Press the **Enter** key after you complete each line.

Note: The Federal, State and City ID numbers are 'information only' fields.

4. Federal ID Number:

Type your federal tax ID number up to twelve (12) characters and **Enter**.

Defining The Sales Analysis System

5. State ID Number:

Type your state tax ID number up to twelve (12) characters and **Enter**.

6. City ID Number:

Type your city tax ID number up to twelve (12) characters and **Enter**.

7. Is The Data Correct? (Y)es, (N)o, (D)elete or (E)nd:

Type **Y** or **E** to return to the Sales Analysis Definition Menu.

Type **N** to return to the company name field for editing. Go to Step 3.

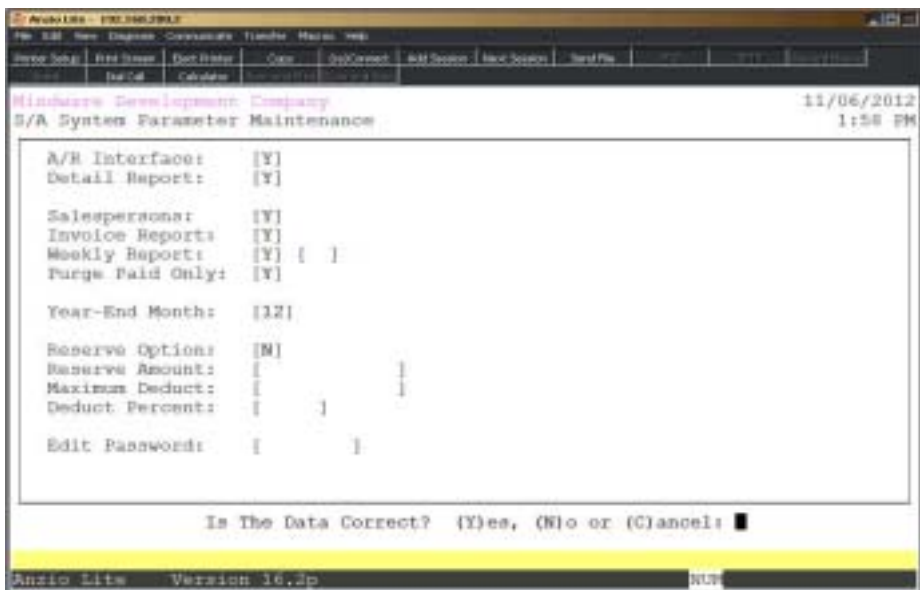
Type **D** to delete the company information.

Sales Analysis Parameters

Overview

The parameters are a series of questions that help determine file creation needs, affect system operation and gives the system flexibility. You can tell the system which reports you want generated during the month and which month is the end of your fiscal year. You have an option to purge paid invoices from the salesperson's invoice file at month-end or purge all invoices.

You can activate the reserve option for salesperson commissions and determine the reserve amount, deduction amount and deduction percentage. Password restrictions can be set up to allow an override of commissions generated by the system.



Procedure

1. Choose Sales Analysis Parameters from the Sales Analysis Definition Menu.

Note: If you are initially setting up the parameters, the cursor displays at the first input field. If you are reviewing the parameters, go to Step 15.

2. A/R Interface:

Type **Y**+ the **Enter** key if you are using the Accounts Receivable system. This parameter allows you to generate the Customer Analysis Report listed on the Sales Analysis System Menu.

Defining The Sales Analysis System

Type **N+** the **Enter** key if you are not interfaced to the Accounts Receivable system.

3. Detail Report:

Type **Y+** the **Enter** key if you want to be able to generate the Salesperson By Customer By Item Report listed on the Sales Analysis Report Menu. Even if you do not have salespersons, you may enter Y. Your report will produce Customer By Item information.

Type **N+** the **Enter** key if you do not want to generate this report.

4. Salespersons:

Type **Y+** the **Enter** key if you have salespersons. This parameter allows you to generate the Salesperson Invoice Report, The Salesperson By Customer By Item Report and the Salesperson Summary Report.

Type **N+** the **Enter** key if you do not have salespersons.

5. Invoice Report:

Type **Y+** the **Enter** key to generate the Salesperson Invoice Report listed on the Sales Analysis Report Menu. You can respond to this prompt only if you answered Y to Step 4.

Type **N+** the **Enter** key if you do not want to generate this report.

6. Weekly Report:

Type **Y+** the **Enter** key if you want to produce a weekly salespersons report.

Type **N+** the **Enter** key if you do not want a weekly report. Go to Step 8.

7. Order Type:

Type up to two (2) order types and **Enter**. Order types are used to summarize sales on the weekly salespersons report.

8. Purge Paid Only?:

Type **Y+** the **Enter** key to purge paid invoices during the 'Period-End Update' process.

Type **N+** the **Enter** key to retain paid invoices during the 'Period-End Update'.

9. Year-End Month:

The number you enter tells the system which month is used for year-end closing. For example, if your fiscal year ends in September, enter 9. Enter the number of the month and **Enter**.

10. Reserve Option:

Type **Y+** the **Enter** key if you want to set up reserve accounts for your salespersons.

Type **N+** the **Enter** key if you do not want to use reserve accounts. Go to Step 12.

Note: Reserve amounts are used to make up for customer sales that become bad debts and a salesperson commission has already been paid.

11. Reserve Amount:

Type the target reserve amount for salespersons and **Enter**.

12. Maximum Deduct:

Type the maximum amount to deduct per payment period and **Enter**.

13. Deduct Percent:

Type the percent of commission to deduct if account is less than reserve amount and **Enter**.

14. Edit Password:

Type the password required to override the salesperson commission amounts and **Enter**.

15. Is The Data Correct? (Y)es, (N)o or (C)ancel:

Type **Y** if the information is correct and return to the Sales Analysis Definition Menu.

Type **N** if the data is not correct. The cursor returns to Step 2. Enter changes as needed.

Type **C** to return to the Sales Analysis Definition Menu without saving any changes.

Note: You will be prompted with this message: Selecting (C)ancel will exit program without saving any parameter changes that have been made. Save changes? (Y)es or (N)o?

Type Y to save any parameter changes that were made and return to the General Ledger Definition Menu.

Type N to return to the General Ledger Definition Menu without saving any changes.

Consult your software vendor before making any changes to system parameters.

File Creation and Information

Overview

File Creation And Information lets you view individual data files in your Sales Analysis system. All of the data files are structured as multi-keyed files, which means that you do not have to increase the size of the files because they are dynamic (automatically increase in size as data is written to each file). The screen displays the file description, file name, file type, key size, byte size of each individual record within the file and the number of records used in each file.

File Description	Name	Type	Key	Size	Used	Free	Records
Inventory S/A File	SLA04	Mky	23	120	0	0	43
Salesperson Inv Rpt File	SLA01	Mky	14	134	0	0	28
Sls by Cust by Item Rpt	SLA02	Mky	34	114	0	0	1
Salesperson Summary File	SLA05	Mky	5	130	0	0	2
Customer S/A File	SLA03	Mky	12	108	0	0	6
Salesperson Weekly Sales File	SLWS1	Mky	11	100	0	0	80
Weekly Sales Parameter File	SAWP1	Mky	0	50	0	0	0

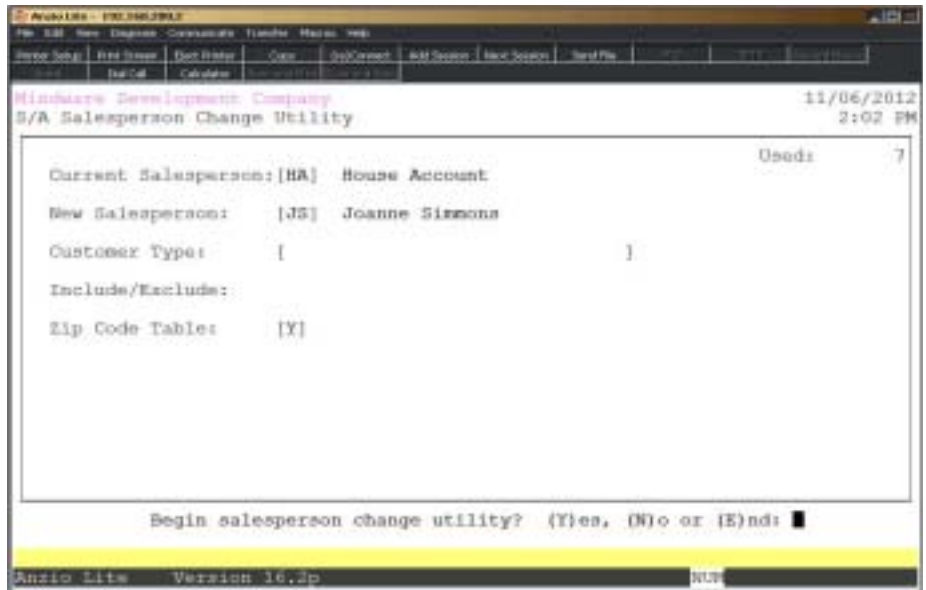
CR to Continue: █

Salesperson Change Utility

Overview

The Salesperson Change Utility searches the Customer Masterfile for the current salesperson code and replaces it with the new salesperson code. You can select to change specific customer types, include/exclude customer types and choose to include the zip code table in the change.

Note: This utility also changes the salesperson code in individual ship-to address records.



Procedure

1. Choose Salesperson Change Utility on the Sales Analysis Definition Menu.

2. Current Salesperson:

Type a two (2) character salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F4** to return to the Sales Analysis Definition Menu.

3. New Salesperson:

Type a two (2) character salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

Defining The Sales Analysis System

4. Customer Type:

Type two (2) character customer type codes, side by side, to include or exclude when running this utility and **Enter**.

5. Include/Exclude:

Type **I+** the **Enter** key to include customer type codes selected in Step 4.

Type **E+** the **Enter** key to exclude customer type codes selected in Step 4.

6. Zip Code Table:

Type **Y+** the **Enter** key to include the zip code table in the change.

Type **N+** the **Enter** key to exclude the zip code table.

7. Begin Salesperson Change Utility? (Y)es, (N)o or (E)nd:

Type **Y** to begin the change utility. Go to Step 8.

Type **N** to edit any changes. Go to Step 2.

Type **E** to return to the Sales Analysis Definition Menu.

8. Salesperson change utility completed, CR to continue:

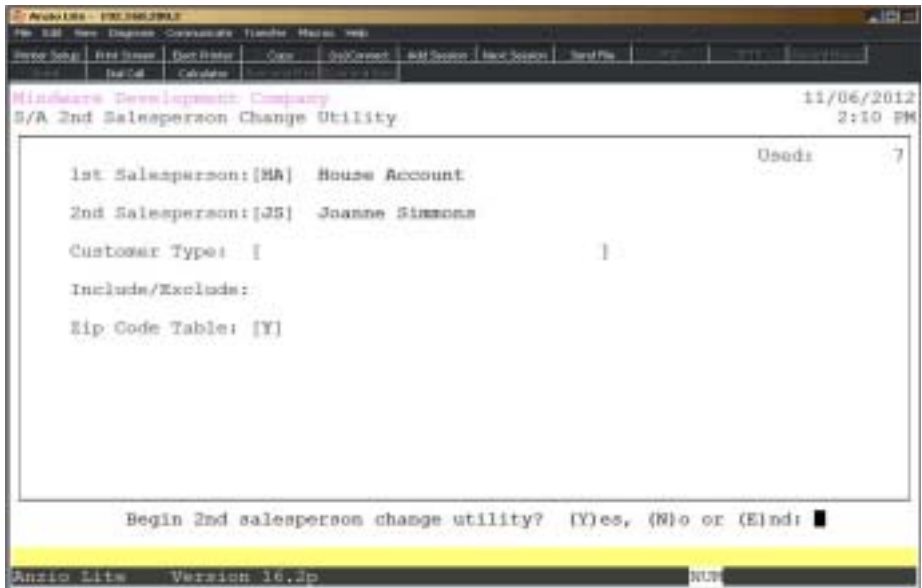
Press the **Enter** key to return to the Sales Analysis Definition Menu.

2nd Salesperson Change Utility

Overview

The 2nd Salesperson Change Utility searches the Customer Masterfile for the first salesperson code and replaces it with the second salesperson code. You can select to change specific customer types, include/exclude certain customer types and choose to include the zip code table in the change.

Note: This utility can only be run if the 'Sales Analysis Parameters' are set up for two salespersons.



Procedure

1. Choose 2nd Salesperson Change Utility on the Sales Analysis Definition Menu.

2. 1st Salesperson:

Type a two (2) character salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F4** to return to the Sales Analysis Definition Menu.

3. 2nd Salesperson:

Type a two (2) character salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

Defining The Sales Analysis System

4. Customer Type:

Type a two (2) character customer type code, side by side, to include or exclude and **Enter**.

5. Include/Exclude:

Type **I+** the **Enter** key to include customer type codes selected in Step 4.

Type **E+** the **Enter** key to exclude customer type codes selected in Step 4.

6. Zip Code Table:

Type **Y+** the **Enter** key to include the zip code table in the change.

Type **N+** the **Enter** key to exclude the zip code table.

7. Begin 2nd Salesperson Change Utility? (Y)es, (N)o or (E)nd:

Type **Y** to begin the change utility. Go to Step 8.

Type **N** to edit any changes. Go to Step 2.

Type **E** to return to the Sales Analysis Definition Menu.

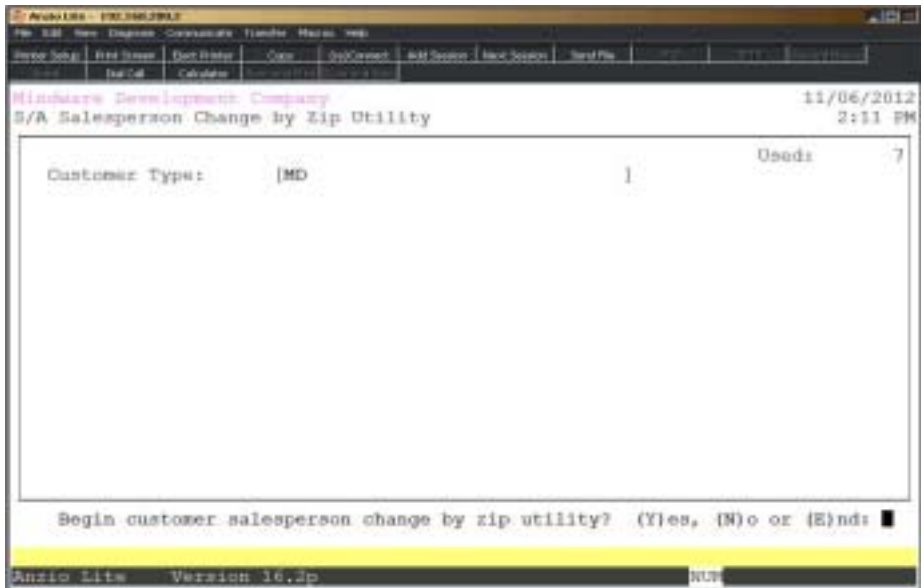
8. 2nd salesperson change utility completed, CR to continue:

Press the **Enter** key to return to the Sales Analysis Definition Menu.

Salesperson Change By Zip Utility

Overview

The Salesperson Change By Zip Utility scans the customer masterfile and changes the salesperson code assigned to the current zip code, excluding the customers with the type codes you entered in the customer type field. Ship-to salesperson codes are also changed.



Procedure

1. Choose Salesperson Change By Zip Utility on the Sales Analysis Definition Menu.
2. Customer Type:
Type two (2) character customer type codes to exclude from change and **Enter**. Do not separate with commas or spaces.
3. Begin Customer Salesperson By Zip Utility Change? (Y)es, (N)o or (E)nd:
Type **Y** to continue with the utility change.
Type **N** to edit the customer types. Return to Step 2.
Type **E** to abort the utility and return to the Sales Analysis Definition Menu.

Salesperson Weekly Summary Maintenance

Overview

The Salesperson Weekly Summary Maintenance programs allows you to enter data by salesperson, sales year, sales week number and inventory item product code. This data is listed on the 'Salesperson Weekly Sales Report' on the Sales Analysis Report Menu. Sales dollars, units sold and a weekly commission amount can be entered for any salesperson for this report.



Procedure

1. Choose Salesperson Weekly Summary Maintenance on the Sales Analysis Definition Menu.

2. Salesperson:

Type a valid salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.

3. Sales Year:

Type the sales year in YYYY format and **Enter**.

4. Sales Week:

Type the week of the year (1-52) and **Enter**.

5. Product Code:

Type up to a three (3) character product category and **Enter** of type ? to display the Product Code Selection window.

6. Sales 1:

Type the sales dollar amount for this week and category and **Enter**.

Note: Parameters for this program are set up in the 'Sales Analysis Parameters' on the Sales Analysis Definition Menu. If you answered Y to weekly sales report, you were prompted with two order types. Sales 1 is the first order type and Sales 2 is the second order type. Sales 3 will be all other order types and will be listed as Other.

7. Sales 2:

Type the sales dollar amount for this week and category and **Enter**.

8. Sales 3:

Type the sales dollar amount for this week and category and **Enter**.

9. Units 1:

Type the number of units for this week and category and **Enter**.

10. Units 2:

Type the number of units for this week and category and **Enter**.

11. Units 3:

Type the number of units for this week and category and **Enter**.

12. Commission:

Type the amount of commission for this salesperson for this week and category and **Enter**.

13. Is The Data Correct? (Y)es, (N)o, (D)elete or (E)nd:

Type **Y** if all of the data for this record is correct. Return to Step 2.

Type **N** to edit the sales and units fields. Return to Step 6.

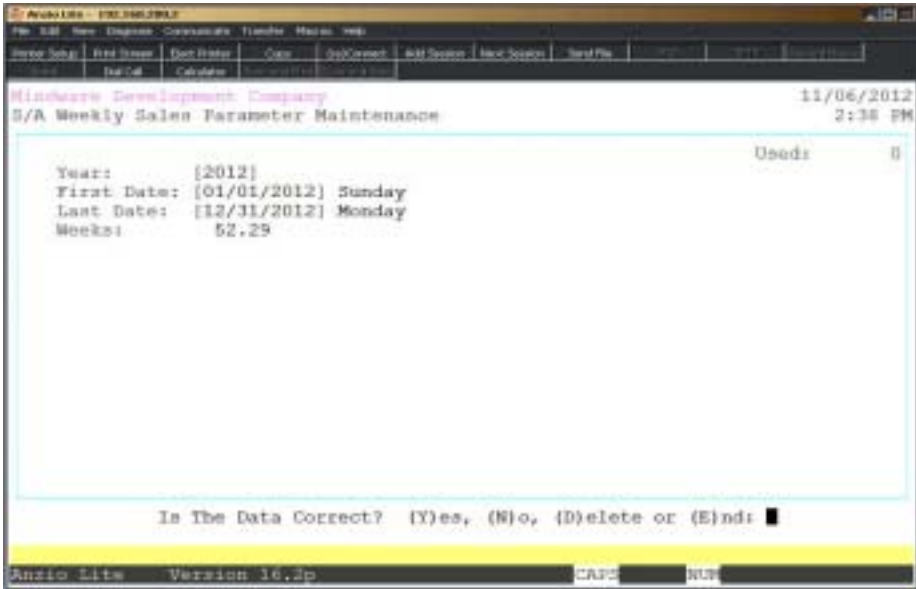
Type **D** to remove this record completely and go to Step 2.

Type **E** to abort this entry and return to the Sales Analysis Definition Menu.

Weekly Sales Parameter Maintenance

Overview

The program is used to calculate the number of weeks between the first and last dates entered. The number of weeks is used on all of the weekly sales analysis reports.



Procedure

1. Select Weekly Sales Parameter Maintenance on the Sales Analysis Definition Menu.

2. Year:

Type the year and press the **Enter** key.

Press **F2** to list the weekly sales to a printer.

Press **F4** to return to the Sales Analysis Definition Menu.

3. First Date:

Type the first date in MMDDYYYY format and **Enter**.

Note: You can enter the month and day and the system will automatically calculate the current century and year.

4. Last Date:

Type the last date in MMDDYYYY format and **Enter**.

Note: Number of weeks are calculated between first and last date and displayed on the screen.

5. Is The Data Correct? (Y)es, (N)o, (D)elete or (E)nd:

Type **Y** if the data is correct. Return to Step 2.

Type **N** to edit the information and return to Step 2.

Type **D** to remove this record completely and go to Step 2.

Type **E** to abort this entry and return to the Sales Analysis Definition Menu.

Weekly Sales Parameter List Sample

MINDWARE Ajay Sood

File Edit View Document Tools Window Help

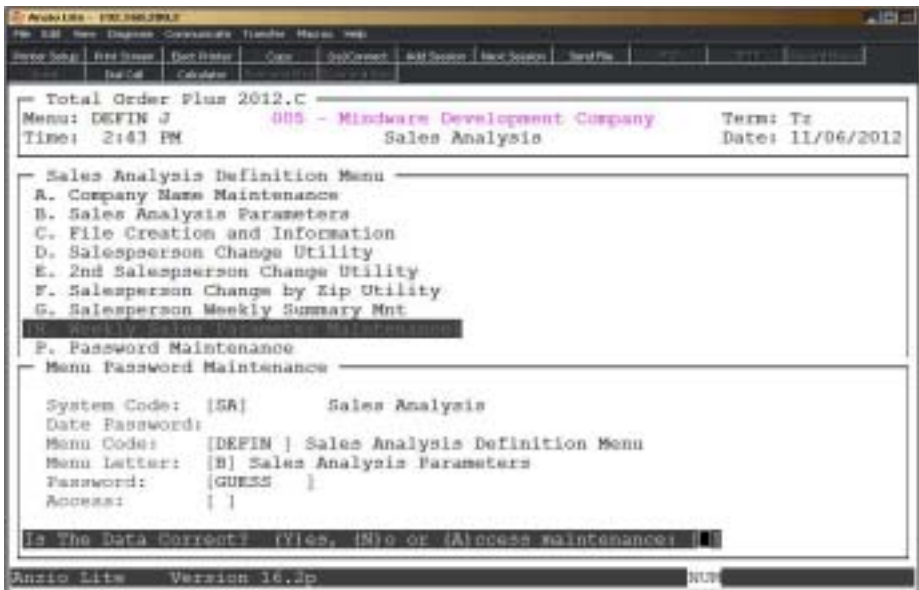
Mindware Development Company Page No: 1
S/A Salesperson Weekly Parameter List Run Date: 11/06/2012
2011 to 2012 Sys Date: 11/06/2012

Year	First Date	Last Date	Weeks
2011	01/01/2011	12/31/2011	52.14
2012	01/01/2012	12/31/2012	52.29

Password Maintenance

Overview

Password Maintenance allows you to set up passwords to restrict access to any of the Sales Analysis menus or individual menu selections. Once you have entered a password for a menu, the system will prompt each user for that password every time they access that menu. The Definition Menu is normally password protected.



Procedure

1. Choose Password Maintenance from the Sales Analysis Definition Menu and **Enter**.

Note: The System Code is automatically defaulted by the system to correspond with the current menu application (i.e. SA - Sales Analysis).

2. Date Password:

Type a date password (optional) and **Enter** or press **Enter** to bypass password entry.

Press **F4** to return to the Sales Analysis Definition Menu.

Note: The system will prompt a user for this password when attempting to change the application date for this module.

3. Menu Code:

Defining The Sales Analysis System

Type the menu code and **Enter** or press **F1** to display the available menu codes.

Note: Menu codes are displayed in the upper left hand corner of each menu screen. See previous page for example: Menu: DEFIN

4. Menu Letter:

Type the **letter**+ the **Enter** key of the menu item to set password for or press **F1** to display the menu item selections (i.e. A, B, C, etc.) for the menu you specified in Step 3.

5. Password:

Type the **password** + the **Enter** key for the menu item listed in Step 4.

6. Is The Data Correct? (Y)es or (N)o:

Type **Y** if data is correct. Return to Step 2.

Type **N** to return to Step 5 to re-enter the password.

Sales Analysis Log Display

The Sales Analysis Log Display captures all of the activity for each user that accesses the Sales Analysis module. This audit can be useful in tracking what user changed the module date, closed a month and what date, edited the salesperson master information etc. Information is displayed in great detail.

```

Anzio Lite - PSE2362912
File Edit View Database Connections Transfer Macro Help
Server Setup  Add Users  Doc Dates  Calc...  Job Connect  Add System  New System  Test File  ...  ...
Print  Del Del  Calculate  ...  ...
Mindspace Development Company  11/06/2012
S/A System Log Display  2:50 PM

-----
Date/Time  Program/User  Term  Description
-----
10/23/12  SAPE60  Tr  Period-end Update
13:59:42  JSIMMONS  Begin:Period, 10/31/2012
10/23/12  SAPE60  Tr  Period-end Update
13:59:42  JSIMMONS  Finish:Period, 10/31/2012
10/23/12  P8SD60.BBJ  Tr  Public Set Processing Date
13:59:38  JSIMMONS  S/A - Processing Date Entry
Set Date: SA - 10/31/2012
10/23/12  SAPE60  Tr  Period-end Update
13:59:29  JSIMMONS  Begin:Period, 06/30/2012
10/23/12  SAPE60  Tr  Period-end Update
13:59:29  JSIMMONS  Finish:Period, 06/30/2012
09/17/12  SASP10  Tr  Salesperson Master Mnt
12:30:20  JSIMMONS  Edit:JS Joanne Simmons
09/17/12  SASP10  Tr  Salesperson Master Mnt
12:30:14  JSIMMONS  Edit:HA House Account
-----

Enter to continue, new date, F3=Find or F4 to exit: / /

Anzio Lite  Version 16.2p  BUS
    
```

3

OPERATING THE SALES ANALYSIS SYSTEM

- Salesperson Masterfile Maintenance**
- Salesperson Commission Maintenance**
- Salesperson Commission Adjustments**
- Period-End Processing**

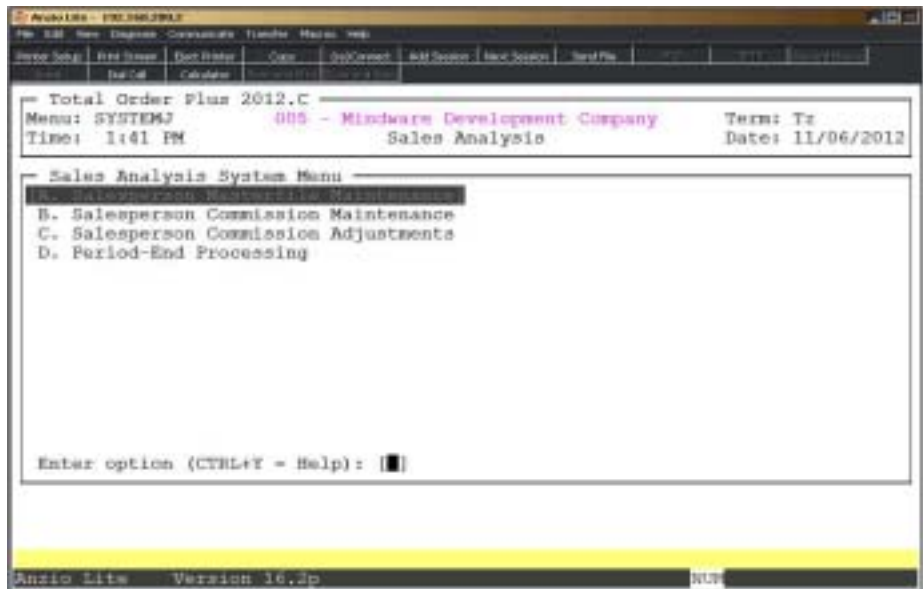
Sales Analysis System Menu

Overview

The Sales Analysis System allows you to set up each salesperson code and name with percent of commission for multiple levels. You can view the invoices for each salesperson, along with the sales by customer and by inventory item.

Salespersons commission amounts can also be adjusted during any period. These adjustments are reflected in the Salesperson Invoice Display on the Salesperson Sub-Menu.

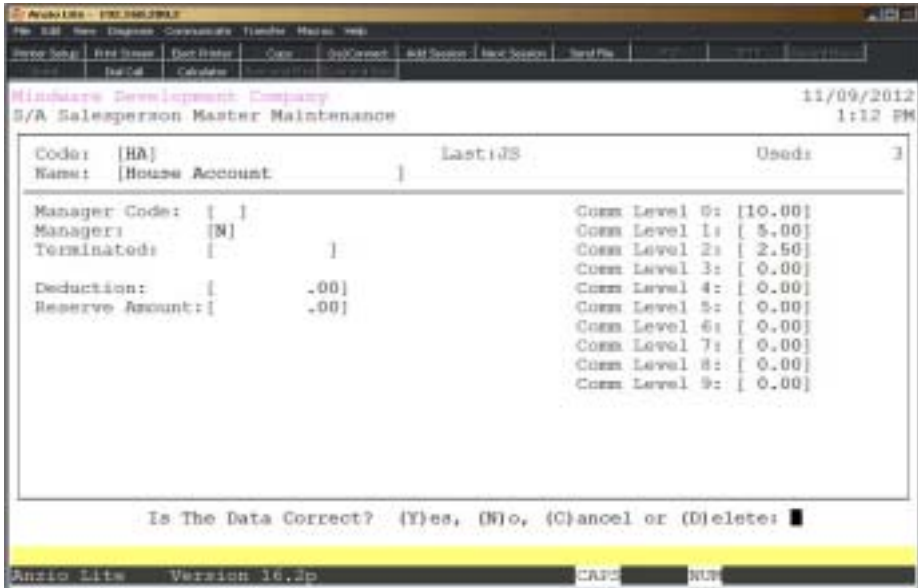
Period-End Processing removes period-to-date sales figures and paid invoices by salesperson, depending on the flag in the 'Sales Analysis Parameters' on the Sales Analysis Definition Menu.



Salesperson Masterfile Maintenance

Overview

Salesperson Maintenance allows you to input multiple commission percentage levels (0-9) for each salesperson. Each item in inventory has a commission flag that can be assigned one of the commission levels. If an item does not carry commission, set the item commission flag to N.



Procedure

1. Choose Salesperson Masterfile Maintenance on the Sales Analysis System Menu.

2. Code:

Type up to a two (2) character salesperson code and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F1** to display the next salesperson in the masterfile.

Press **F4** to return to the Sales Analysis System Menu.

3. Is This A New Salesperson Code? (Y)es or (N)o:

Type **Y+** the **Enter** key to accept the new code.

Type **N+** the **Enter** key to re-enter a new code. Return to Step 2.

4. Name:

Type up to a twenty-four (24) character salesperson name and **Enter**.

Press **F1** to replicate the previous salesperson's name.

Press **F4** to return to the Sales Analysis System Menu.

5. Manager Code:

Type up to a two (2) character salesperson manager code and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

6. Manager:

Type **Y**+ the **Enter** key if this salesperson is a manager.

Type **N**+ the **Enter** key if this salesperson is not a manager.

7. Terminated:

Type the termination date for this salesperson in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

Press the **Spacebar**+ the **Enter** key to bypass entering a termination date.

8. Comm Level 0:

Type a level commission percentage for level zero and **Enter**. The percentage format is 99.99.

*Note: Levels 1-9 are the same input routine as level 0 in Step 8.
Repeat the input for each level of commission you intend to use.*

9. Debit Account:

Type a General Ledger debit account number for salesperson's commissions and **Enter** or type **?** to display the Account Number Selection window.

10. Credit Account:

Type a General Ledger credit account number for salesperson's commissions and **Enter** or type **?**+ the **Enter** key to display the Account Number Selection window.

Note: If you should add commission account numbers to the General Ledger account master, you will need to relink the System Parameters on the Order Entry Definition Menu in order for the account numbers to be recognized in Salesperson Masterfile Maintenance.

11. Is The Data Correct? (Y)es, (N)o, (C)ancel or (D)elete:

Type **Y** to accept the data and return to Step 2.

Operating The Sales Analysis System

Type **N** to edit the data and return to Step 4.

Type **C** to cancel the input and return to the Salesperson Sub-Menu without saving any changes.

Note: Selecting (C)ancel will exit the program without saving any parameter changes that have been made. Save changes? (Y)es or (N)o:

*Type **Y** to save the parameter settings and return to the Salesperson Sub-Menu.*

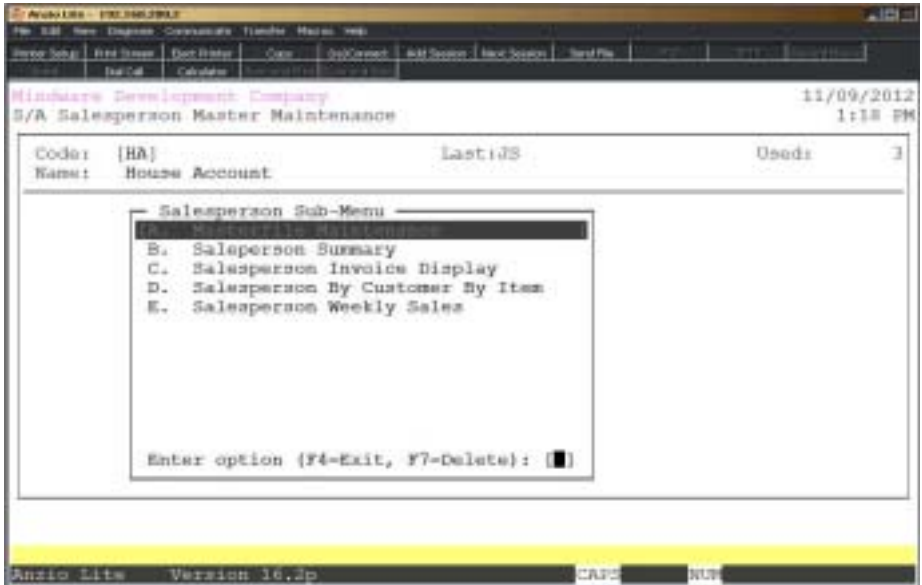
*Type **N** to **not** save changes and return to the Salesperson Sub-Menu.*

Type **D** to remove this salesperson from the system. Go to Step 2.

Salesperson Sub-Menu

Overview

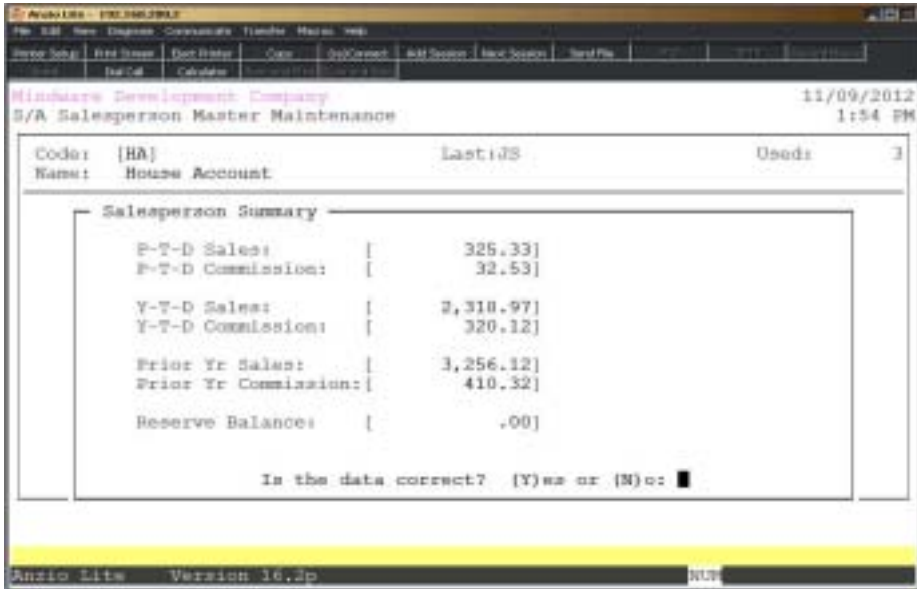
The Sales Analysis Salesperson Sub-Menu allows you to view or edit the percent of commission for multiple levels (0-9). You can view the period-to-date, year-to-date and prior year sales and amount of commission, all open invoices showing amount of commission per invoice and sales and units sold by customer and by inventory item period-to-date.



Salesperson Summary

Overview

The Salesperson Summary displays the period-to-date, year-to-date and prior year sales for each salesperson, the commissions paid period-to-date, year-to-date and prior year and the salesperson's current reserve balance. These figures can be input upon initialization of a new Sales Analysis system, as long as the figures are available.



Procedure

1. Choose Salesperson Summary on the Salesperson Sub-Menu.

2. Is The Data Correct? (Y)es or (N)o:

Type **Y** if the sales figures displayed are correct and return to the Salesperson Sub-Menu.

Type **N** to edit the sales figures and go to Step 3.

3. P-T-D Sales:

Type the period-to-date sales figure and **Enter**.

4. P-T-D Commission:

Type the period-to-date commission figure and **Enter**.

Press **F2** to return to the previous input field.

5. Y-T-D Sales:

Type the year-to-date sales figure and **Enter**.

6. Y-T-D Commission:

Type the year-to-date commission figure and **Enter**.

7. Prior Yr Sales:

Type the prior year sales figure and **Enter**.

8. Prior Yr Commission:

Type the prior year commission figure and **Enter**.

9. Reserve Amount:

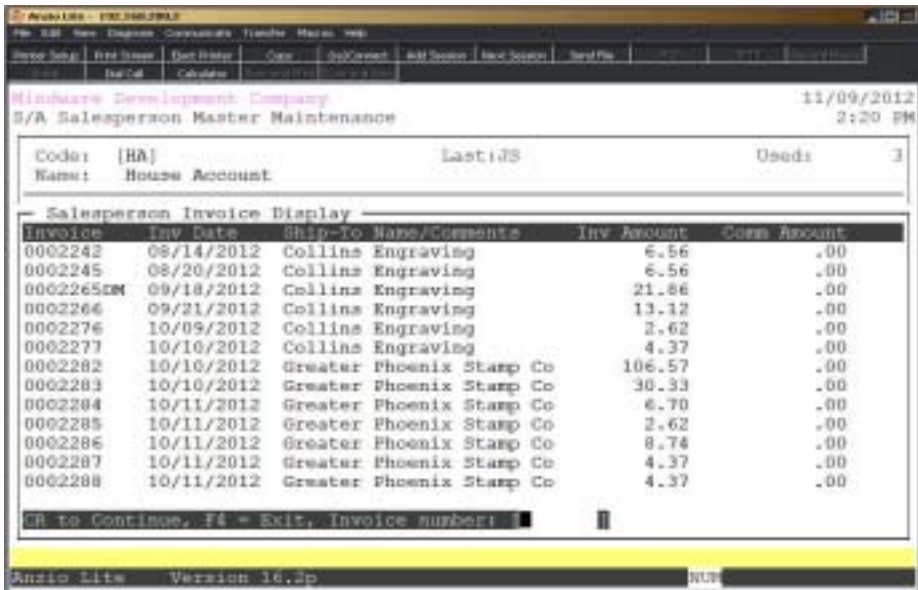
Type the reserve account amount for this salesperson and **Enter**. Return to Step 2.

Salesperson Invoice Display

Overview

The Salesperson Invoice Display lists all invoices not yet purged from the Salesperson Invoice Masterfile. Invoices are purged during 'Period-End Processing', with an option to purge only if the invoice has been paid by the customer.

Information displayed includes invoice number and date, ship-to name, amount of the invoice and the amount of calculated commission and any commission adjustments made to the salesperson's account. The display also reflects any adjustments made to a commission amount on an invoice, showing the original amount of commission and the new commission amount.



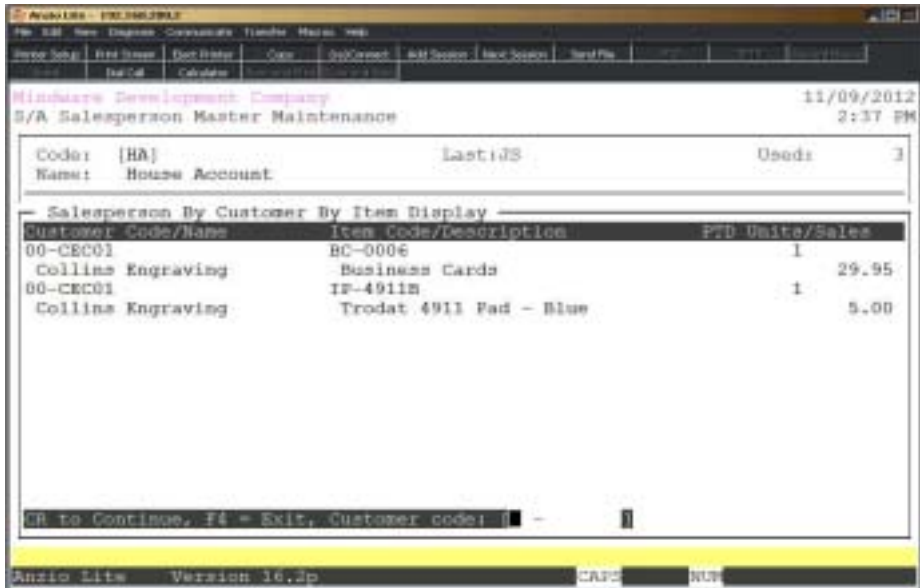
Procedure

1. Choose Salesperson Invoice Display on the Salesperson Sub-Menu.
2. CR to Continue, F4 to Exit, Invoice Number:
Press the **Enter** key to advance the display to the next screen.
Press **F4** to return to the Salesperson Sub-Menu.
Type an **invoice number** to advance the display to that invoice number.

Salesperson By Customer By Item Display

Overview

The Salesperson By Customer By Item Display lists each customer code and name, the item code and item description and the period-to-date units sold and sales dollars. This information is purged during the Period-End Processing procedure.



Procedure

1. Choose Salesperson By Customer By Item Display on the Salesperson Sub-Menu.
2. CR to Continue, F4 to Exit, Customer Code:

Press the **Enter** key to advance the display to the next screen.

Press **F4** to return to the Salesperson Sub-Menu.

Type a **customer code** to advance the display to that customer.

Salesperson Weekly Sales

Overview

The Salesperson Weekly Sales displays the year, week of the year, product category, sales and units, commission amount and number of orders for the selected salesperson.

The screenshot shows a terminal window for 'Anzio Lite - PDL4ML2PDL'. The title bar includes menu options: File, Edit, View, Display, Conversion, Transfer, Macro, Help. The main window displays the following information:

Minicare Development Company 11/09/2012
S/A Salesperson Master Maintenance 2:20 PM

Code: [HA] Last: JS Used: 3
Name: House Account

--- S/A Salesperson Weekly Sales Display ---

Year	Wk	Cat	Sales/Units 1	Sales/Units 2	Sales/Units 3	Comm/Orders
2012	03	IN	.00	.00	2.00	.00
			.0	.0	1.0	1
2012	03	IP	.00	.00	300.00	.00
2012	06	IN	.00	.0	15.0	3
			.0	.0	5.96	.00
2012	09	IN	.00	.0	2.0	2
			.0	.0	2.00	.00
2012	13	IN	.00	.0	1.0	1
			.0	.0	6.00	.00
2012	14	IN	.00	.0	5.0	1
			.0	.0	6.00	.00
2012	38	IN	.00	.0	5.0	1
			.0	.0	32.00	.00
			.0	.0	10.0	2

CR to Continue, F4 = Exit, Year: |

Anzio Lite Version 10.2p

Salesperson Commission Maintenance

Overview

The Salesperson Commission Maintenance program is designed to let you edit the commission amount on each invoice in the salesperson invoice file for the current period. The display shows the invoice total, the amount of the invoice that had commission and the original commission amount calculated during invoice data entry. You can only access the new commission amount field. These totals are listed on the 'Salesperson Invoice Report' on the Sales Analysis System Menu.

```

Anzio Lite - PDL00L001
File Edit Help Database Conversion Transfer Macro Help
Enter Sel.  F12 Home  Del Home  Copy  Del/Cancel  All Screen  Next Screen  Next Pk  F10  F11  F12
Tab Col  Calculate
Mindware Development Company 11/09/2012
S/A Salesperson Commission Maintenance 2:02 PM

Salesperson: [HA] House Account Used: 30
Invoice Number: [0002242]
Invoice Date: 08/14/2012
Customer: 00-CEC01 Collins Engraving
1010 East Missouri
Suite 200
Phoenix AZ 85009

Ship-To Name: Collins Engraving
Invoice Total: 6.56
Comm Sales: 1.00
Original Comm Amt: .00
Commission Amount: [.00]

Is The Data Correct? (Y)es, (N)o or (E)nd: █
Anzio Lite Version 16.2p
    
```

Procedure

1. Choose Salesperson Commission Maintenance on the Sales Analysis System Menu.

2. Salesperson:

Type a valid salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F4** to return to the Sales Analysis System Menu.

3. Invoice Number:

Type the invoice number that you want to edit and **Enter**.

Press **F2** to return to the previous input field.

4. Is The Data Correct? (Y)es, (N)o or (E)nd:

Operating The Sales Analysis System

Type **Y** to accept the commission amount displayed. Go to Step 2.

Type **N** to edit the commission amount. Go to Step 5.

Type **E** to end the program and return to the Sales Analysis System Menu.

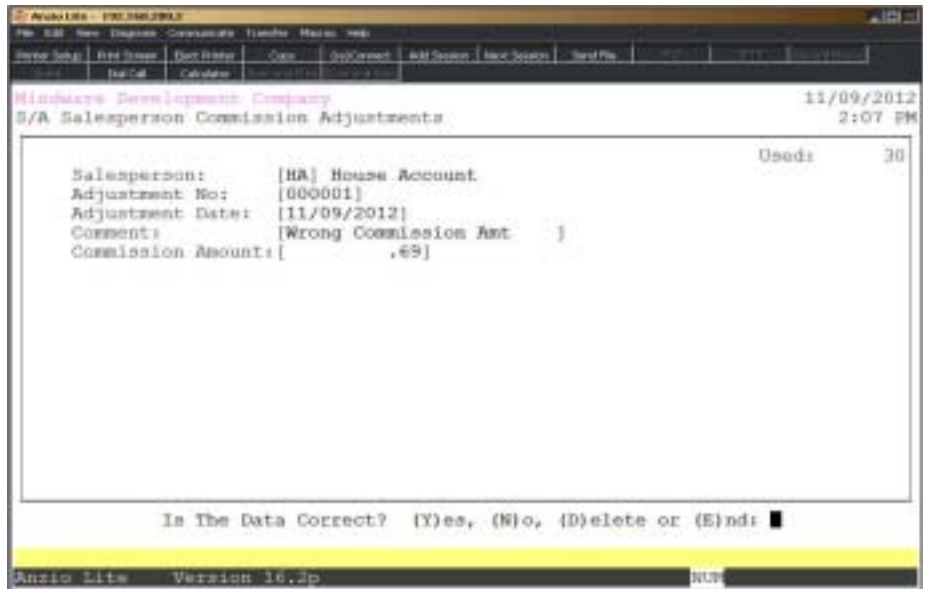
5. Commission Amount:

Type the new commission amount and **Enter**. Return to Step 4.

Salesperson Commission Adjustments

Overview

Commission adjustments allows you to adjust the amount of commission on a salesperson's account. This can be a positive or negative adjustment. The adjustment is assigned a number by the system and is written to the salesperson's invoice masterfile and is reflected on the 'Salesperson Invoice Report' on the Sales Analysis Report Menu.



Procedure

1. Choose Salesperson Commission Adjustments on the Sales Analysis System Menu.

2. Salesperson:

Type a valid salesperson code and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F4** to return to the Sales Analysis System Menu.

3. Adjustment No:

Type in an existing adjustment number and **Enter**.

Press **F1** to let the system assign the next available adjustment number.

Press **F2** to return to the previous input field.

Operating The Sales Analysis System

4. Adjustment Date:

Press the **Enter** key to accept the application date displayed or override the date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

5. Comment:

Type up to a twenty-four (24) character comment about this adjustment and **Enter**.

6. Commission Amount:

Type the amount of the commission and **Enter**.

Note: If the adjustment is a credit amount, enter a minus sign (-) before the amount.

7. Is The Data Correct? (Y)es, (N)o, (D)elete or (E)nd:

Type **Y** to accept the adjustment amount. Go to Step 2.

Type **N** to edit the adjustment and go to Step 4.

Type **D** to remove this adjustment and return to Step 2.

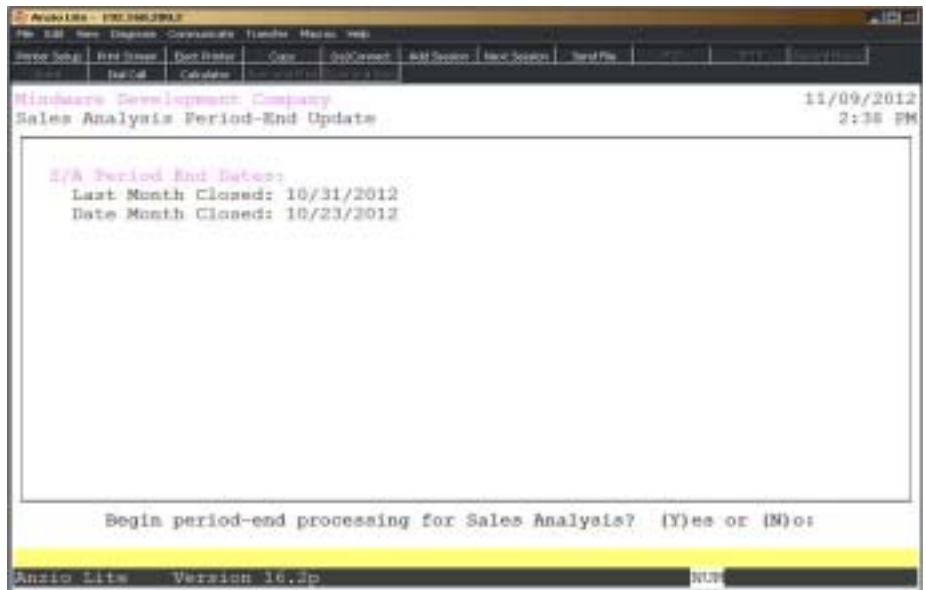
Type **E** to end the program and return to the Sales Analysis System Menu.

Period-End Processing

Overview

The Sales Analysis Period-End Processing must be performed at the end of each accounting period. Prior to performing period-end processing, be sure that you have updated all invoices for the period from the Order Entry system. Make sure the date on the Sales Analysis System Menu is set to the last day of the current month and that you have run a final copy of every analysis report that you use. The dates of the last month closed displays in the upper right corner of your screen.

Period-End Processing sets all month-to-date totals to zero. The yearly totals remain intact. If the month of the application date is the same as the year-end month you entered in the Sales Analysis Parameters, you should answer yes to perform year-end processing so year-to-date totals will be set to zero.



Procedure

1. Choose Period-End Processing from the Sales Analysis System Menu.
2. Begin Period-End Processing for Sales Analysis? (Y)es or (N)o:
Type **N** to return to the Sales Analysis System Menu.
Type **Y** to continue period-end processing.

Note: This message will display on your screen: 'Warning: This Will Clear All Period-To-Date Information. All Sales Analysis Reports

Operating The Sales Analysis System

*Should Be Printed Before Update. Begin Sales Analysis Update?
(Y)es or (N)o. Type **Y** to continue the update or **N** to return to the
Sales Analysis System Menu to process your reports.*

3. Begin Year-End Processing for Sales Analysis? (Y)es or (N)o:

Type **Y** to continue year-end processing and clear Y-T-D totals.

Type **N** to return to the Sales Analysis System Menu.

4

SALES ANALYSIS REPORT SYSTEM

- Order Entry Interface**
- Sales Analysis Report Menu**
- Salesperson Masterfile Report**
- Salesperson Invoice Report**
- Salesperson Invoice Report (Item Detail)**
- Salesperson by Customer by Item Report**
- Customer Analysis Report**
- Customer Item Analysis Report**
- Inventory Item Report**
- Salesperson Summary Report**
- Salesperson Weekly Detail Report**
- Salesperson Weekly Sales Report**
- Salesperson Current Week Sales Report**
- Salesperson Commission Report**
- Salesperson Commission Report by Manager**
- Salesperson Customer Mailing Labels**
- Open Invoices By Salesperson**
- Salesperson Invoice Report (History)**
- S/A Report Writer**

Order Entry Interface

Overview

The Sales Analysis system can generate five different sales reports using data received from the Order Entry system. How you set up and operate your Order Entry system affects the figures in Sales Analysis reports.

Before you can successfully operate your Sales Analysis system, you should review several portions of your Order Entry system. Sections related to salespersons, commissions, and invoice totals affect S/A. The following Order Entry elements are related to the Sales Analysis system:

The Commission type (gross profit, total sales, or none) is set in the parameter section of the Order Entry system.

In Miscellaneous Code Maintenance for Order Entry, you specified whether or not predefined charges are subject to commission.

Your list of salespersons and commission rates is defined in Salesperson Maintenance in the Order Entry options menu. If you delete a salesperson, do not reuse the salesperson code until the beginning of a new fiscal year. If you use the same code for two different salespersons, the year-to-date figures will show the total of the two salespersons.

For every order or invoice you enter in Order Entry system, you must indicate if an item is subject to commission and assign a commission level 0-9 or N if no commission level. The default for each item is defined in Item Masterfile Maintenance in the Inventory Control system.

The Order Entry system calculates the commission base for salespersons.

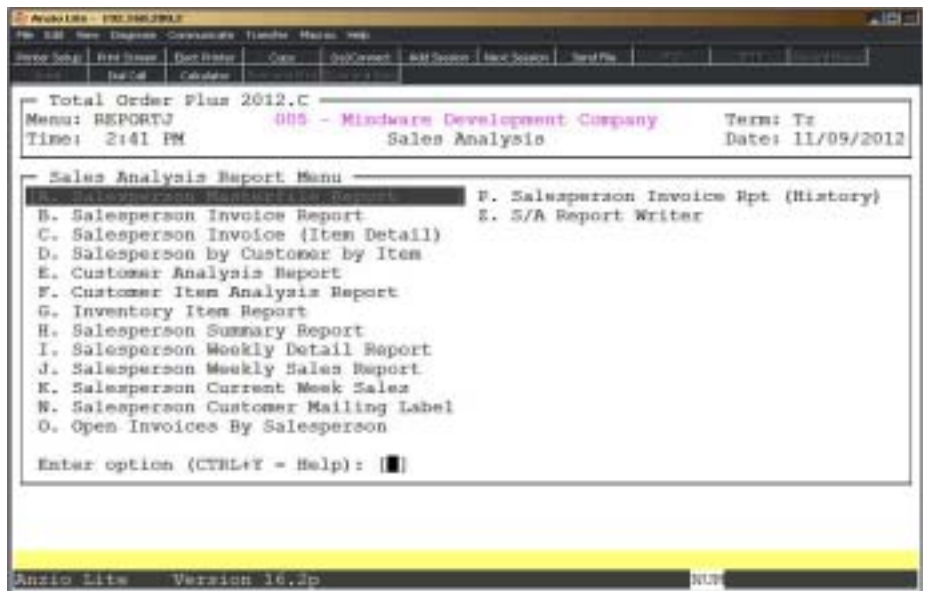
Sales data is transferred to the Sales Analysis system from the Order Entry system during the Daily Sales Journal & Update. After you print invoices, you must print the Sales Journal, the Salesperson Summary, Sales Tax Report and the Backorder Report. You must update the invoices before you can update to the Sales Analysis system. Be sure you have completed the update process before attempting to print Sales Analysis reports.

Sales Analysis Report Menu

Overview

The Sales Analysis system generates reports using data supplied by the Order Entry system. The reports generated are by salesperson, by item, period-to-date and year-to-date sales dollars, customer summary reports and inventory item reports. You should run each of these reports before processing the period-end update. You can decide which reports you will need to run that best suits your business needs.

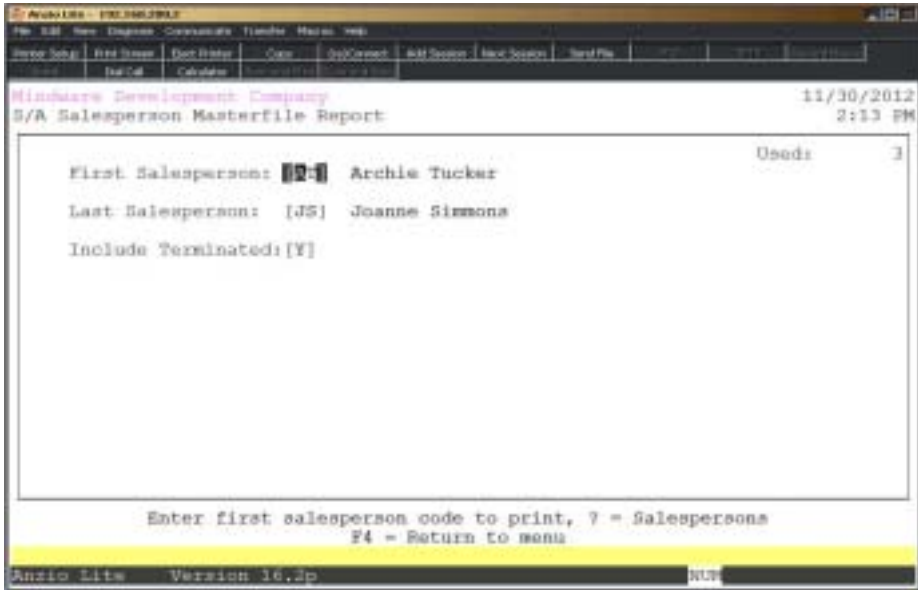
Note: The available and used in the upper right hand corner of each report screen reflects the number of records currently available in the analysis file and how many records have already been used.



Salesperson Masterfile Report

Overview

The Salesperson Masterfile report list the salesperson code and name, the manager code and name, commission percentage for levels 0-9 and termination information.



Procedure

1. Choose Salesperson Masterfile Report on the Sales Analysis Report Menu.
2. First Salesperson:
Type the first salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.
Press **F4** to return to the Sales Analysis Report Menu.
3. Last Salesperson:
Type the last salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.
Press **F2** to return to the previous input field.
4. Include Terminated:
Type **Y+** the **Enter** key if you want to include terminated salespersons.
5. Select the appropriate printer for this report.

Salesperson Masterfile Report Sample

Windows Explorer - Adobe Reader

File Edit View Document Tools Window Help

1 / 1

PDFS

Windows Development Company
 S/S Salesperson Masterfile Report
 Salesperson: AT 00 AT, Terminated: Y

Page No: 1
 Run Date: 11/04/2011
 Run Time: 11/04/2011

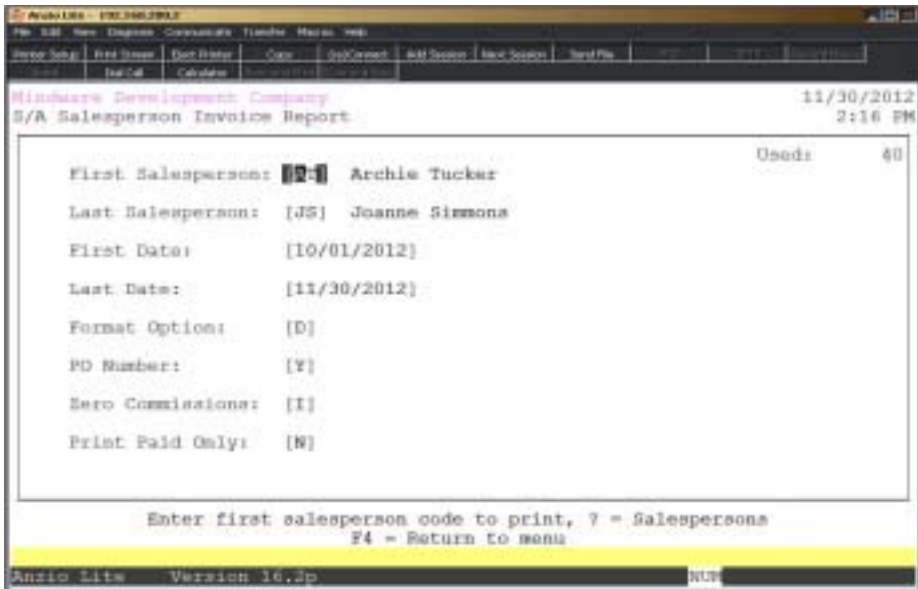
Code	Salesperson Name	Age	Manager Name	Resource Num	Ln	0	1	2	3	4	5	6	7	8	9
AT	Archie Taylor	38		00	10	0	0	0	0	0	0	0	0	0	0
BA	Bonus Account	0		00	10	0	0	0	0	0	0	0	0	0	0
SI	James Simmons	38		00	10	0	0	0	0	0	0	0	0	0	0

Total Listed: 3

Salesperson Invoice Report

Overview

The Salesperson Invoice Report lists the order date, invoice date, invoice number, customer code, customer ship-to name, invoice total, commissioned sales and total commission. Reports totals are by salesperson and a combined report total.



Procedure

1. Choose the Salesperson Invoice Report on the Sales Analysis Report Menu.

2. First Salesperson:

Type the first salesperson code to print and **Enter** or type ? to display the Salesperson Code Selection window.

3. Last Salesperson:

Type the last salesperson code to print and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

4. First Date:

Type the beginning invoice date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

Press the **Enter** key to print all invoices.

5. Last Date:

Type the ending invoice date in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

Press the **Enter** key to print all invoices.

6. Format Option:

Type **D+** the **Enter** key to print the report in detailed format.

Type **S+** the **Enter** key to print the report in summary format.

7. PO Number:

Type **Y+** the **Enter** key to include the purchase order number on this report.

Type **N+** the **Enter** key not to include the purchase order number.

8. Zero Commissions:

Type **I+** the **Enter** key to include invoices with zero commissions.

Type **S+** the **Enter** key to skip zero commission invoices.

Type **Z+** the **Enter** key to print only zero commission invoices.

9. Print Paid Only?

Type **Y+** the **Enter** key to list only paid invoices on this report.

Type **N+** the **Enter** key to list all invoices.

10. Select the appropriate printer for this report.

Note: The Salesperson Invoice Report totals include sales tax and shipping charges.

Salesperson Invoice Report Sample

Madison Development Company
 612 Salesperson Invoice Report
 Salesperson: AE to BE, 10/01/2011 to 12/31/2011

Page No: 1
 Run Date: 11/26/2011
 Sys Date: 11/26/2011

 00 - Summary Summary

Order Date	Invoice Date	Invoice Number	Customer Code	Ship-To Name/PO Number	Invoice ⁰¹ Total	Commissionable Sales	Commission Total	Original Commission
10/15/11	10/11/11	0002391	10-AR001	MFC Marketing Devloper	10.17	13.97	1.95	1.40
10/16/11	10/28/11	0002397	10-AR001	MFC Division of Humilis	0.78	.00	.00	.00
10/16/11	10/21/11	0002310	10-AR001	Wilson Stamp and Sign Co	0.31	.00	.00	.00
10/16/11	10/21/11	0002310	10-AR001	Wilson Stamp and Sign Co	0.71	.00	.00	.00
10/20/11	10/21/11	0002310	10-AR001	MFC DIVISION OF HUMILIS	.00	.00	.00	.00
09/29/11	11/07/11	0002310	10-AR001	MFC Division of Humilis	10.10	.00	.00	.00
11/06/11	11/09/11	0002311	10-AR001	Wilson Stamp and Sign Co	11.45	.00	.00	.00
08/18/11	11/09/11	0002312	10-AR001	MFC Division of Humilis	27.00	.00	.00	.00
12/15/11	11/28/11	0002310	10-AR001	MFC DIVISION OF HUMILIS	10.70	61.90	4.90	4.00
Salesperson Total:					140.71	121.97	14.00	13.40
Report Total:					600.70	121.97	14.00	13.40

* Includes tax and shipping charges

Salesperson Invoice Report (Item Detail)

Overview

The Salesperson Invoice Report with Item Detail prints invoice and inventory item information by salesperson code. The report includes the invoice number and date, customer code and ship-to name, item code and description, number of items shipped and the total dollar amount.

The report totals include sales tax and shipping charges. You can have the option to print a detailed report, a summary only report or a combination of the two choices.

The screenshot shows a software interface for 'Anzio Lite - PRO/MS/SQL'. The main window title is 'S/A Salesperson Invoice Report With Item Detail'. The date and time are 11/30/2012 at 2:31 PM. The company name is 'Minchew Development Company'. The screen displays the following options:

- First Salesperson: [134] House Account
- Last Salesperson: [J5] Joanne Simmons
- First Date: [/ /]
- Last Date: [11/30/2012]
- Format Options: [1]
- Include PD: [N]
- Print Paid Only: [Y]

At the bottom, there is a yellow bar with the text: 'Enter first salesperson code to print, ? = Salespersons' and 'F4 = Return to menu'. The status bar at the very bottom shows 'Anzio Lite Version 16.2p' and 'MUY'.

Procedure

1. Choose the Salesperson Invoice Report (Item Detail) on the Sales Analysis Report Menu.

2. First Salesperson:

Type the first salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F4** to return to the Sales Analysis Report Menu.

3. Last Salesperson:

Type the last salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

Sales Analysis Reporting Menu

Press **F2** to return to the previous input field.

4. First Date:

Type the beginning invoice date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

5. Last Date:

Type the ending invoice date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

6. Format Option:

Type **1+** the **Enter** key to print the report in detail format.

Type **2+** the **Enter** key to print the report in detail and summary format.

Type **3+** the **Enter** key to print the report in summary format only.

7. Include PO:

Type **Y+** the **Enter** key to print the purchase order number on this report.

Type **N+** the **Enter** key not to print the purchase order number.

8. Print Paid Only:

Type **Y+** the **Enter** key to print paid invoices only.

Type **N+** the **Enter** key to list all invoices on this report.

9. Select the appropriate printer for this report.

Salesperson Invoice Report (Item Detail) Sample

WinVista Development Company							Page No:	1
Salesperson Invoice Report With Item Detail							Run Date:	11/24/2011
Salesperson: AF to 23 / / to 12/31/2011							App Date:	11/24/2011

30 - Access Expense								

Date	Invoice Number	Customer Code	Ship-To Name/CO	Item Code	Item Description	Shipped Qty	Unit Extension	

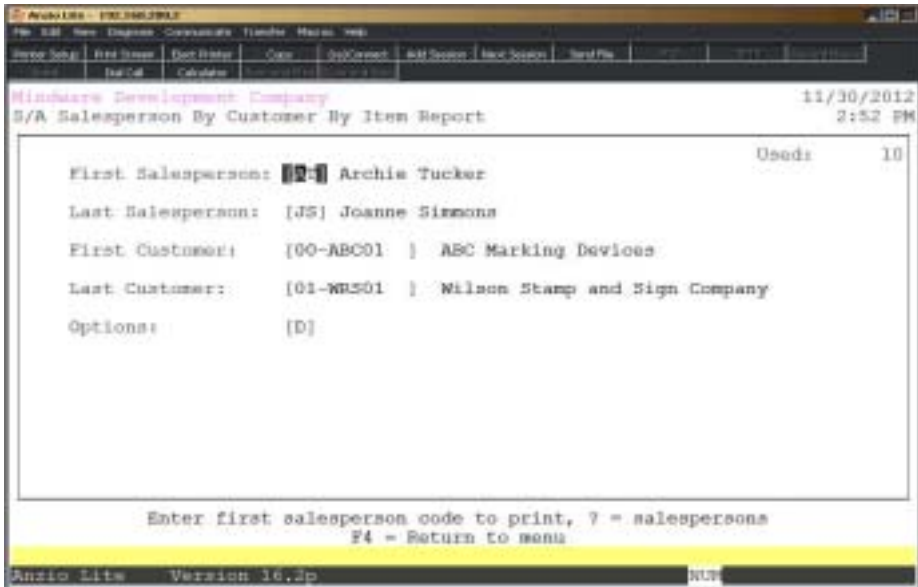
10/10/11	9902294	99-JB001	ABC Marketing Division 99-101	23-Low 1" Head Strap		2.0	10.00	
10/10/11	9902300	99-JB001	ABC Division of The 99-20177	Web Job 2 00		2.0	8.00	
10/20/11	9902316	99-AB001	Wilson Group and SI 20-20118	Web Job 1 00		2.0	8.00	
10/20/11	9902318	99-AB001	ABC Division of The 20-20189	Fluor Tag Set - Cling		1	.00	
11/07/11	9902319	99-JB001	ABC Division of The 99-20118	Business Card 910		2.0	70.00	
11/09/11	9902311	99-AB001	Wilson Group and SI 20-40118	Trucker 4013 Tool - Blue		2.0	20.00	
11/09/11	9902312	99-JB001	ABC Division of The 99-20118	Business Card 910		2.0	70.00	
11/10/11	9902319	99-AB001	ABC Division of The 20-20118	Black Job 2 00		10.0	40.00	
			Message	Vertical Report		0	-10.00	
Salesperson Total:						17.1	340.00	

Item Summary				99-20118	Business Card 910	2.0	70.00	
			20-20189	Fluor Tag Set - Cling	1	.00		
			99-101	23 Low 1" Head Strap	2.0	10.00		
			20-20118	Black Job 2 00	10.0	40.00		
			20-20118	Web Job 1 00	2.0	8.00		
			20-20177	Web Job 2 00	2.0	8.00		
			20-40118	Trucker 4013 Tool - Blue	2.0	20.00		
			Message	Vertical Report	0	-10.00		

Salesperson By Customer By Item Report

Overview

The Salesperson By Customer By Item Report lists by individual salesperson all customer item purchases for the current accounting period. Information listed includes customer code and name, item code and description, period-to-date units sold, period-to-date average cost, period-to-date sales dollars and the percent of profit margin. Report totals include customer, salesperson and a combined total for all salespersons. This report does not include sales tax or shipping charges.



Procedure

1. Choose Salesperson By Customer By Item Report on the Sales Analysis Report Menu.

2. First Salesperson:

Type the first salesperson to print and **Enter** or type ? to display the Salesperson Code Selection window.

3. Last Salesperson:

Type the last salesperson to print and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

4. First Customer:

Type the last customer to print and **Enter** or type ? to display the Customer Code Selection window.

5. Last Customer:

Type the last customer to print and **Enter** or type ? to display the Customer Code Selection window.

6. Options:

Type (D) for invoice detail or (S) to print a summary of one line per salesperson per customer.

7. Select the appropriate printer for this report.

Salesperson By Customer By Item Report Sample

WinVista Development Company
 Q/W Salesperson By Customer By Item Report
 Salesperson: 07 to 08, Customer: 00-00001 to 01-00001
 Page No: 1
 Run Date: 11/24/2011
 Sys Date: 11/24/2011

 00-00001

Customer	Item Code	Item Description	Q.F.D Units	Q.T.D Reg Cost	Q.T.D Sales	Margin
00-00001	BC-1004	Business Card 1004	1.00	30.00	70.00	57.50%
00/ Marketing Services	CL-10000	Fancy Tag Set - Cling	.00	.00	.00	00.00%
	DB-10010	Black Ink 2 GB	10.00	20.00	60.00	60.00%
Customer Total:			11.00	50.00	130.00	54.70%
01-00001	DB-10010	Red Ink 1 GB	1.00	1.00	4.00	60.00%
Wilson Sleep and Signs Corp-00118		Truckee Hill Pad - Blue	2.00	20.00	20.00	00.00%
Customer Total:			3.00	21.00	24.00	60.00%
Salesperson Total:			14.00	71.00	154.00	61.24%
Report Total:			14.00	100.00	181.00	60.43%

Customer Analysis Report

Overview

The Customer Analysis Report options include (C)ustomer code order, (P)eriod-to-date sales or (Y)ear-to-date sales (in descending order). Information includes customer code, customer name, period-to-date sales, period-to-date cost and profit margin percentage, year-to-date sales, year-to-date cost and profit margin percentages.

If you answered Y to divisions in the Accounts Receivable parameters, the sort order by (C)ustomer will print totals by division. Report totals do not include sales tax or shipping charges.

Anzio Lite - PDL000700
 Enter Sales | Rpt Sales | Det Dates | Cost | Op/Comm | All Sales | Inv Sales | Inv Pts | Reports
 Mindware Development Company 11/30/2012
 Customer Analysis Report 3:09 PM
 Usage: 6
 First Customer: 00-ASC01 ABC Marking Devices
 Last Customer: 01-MRS01 Wilson Stamp and Sign Company
 Sort Option: [1] (000000)
 Percent Option: [P]
 Cost/Prior Year: [Y]
 First Date:
 Last Date:
 Enter First Customer Code to Print, F6=Exit
 Anzio Lite Version 16.2p CAPC NUP

Procedure

1. Choose Customer Analysis Report on the Sales Analysis Report Menu.

2. First Customer:

Type the first customer code to print and **Enter** or type **?** to display the Customer Code Selection window.

3. Last Customer:

Type the last customer code to print and **Enter** or type **?** to display the Customer Code Selection window.

Press **F2** to return to the previous input field.

4. Sort Option:

Type **1+** the **Enter** key to sort this report in customer code order.

Type **2+** the **Enter** key to print in state code order.

Type **3+** the **Enter** key to sort this report by period-to-date sales.

Type **4+** the **Enter** key to sort this report by year-to-date sales.

Type **5+** the **Enter** key to sort this report by prior year-to-date sales.

Note: If you select to sort this report by either period-to-date or year-to-date sales, you will be prompted with an option to select the number of top performing customers you want to include on this report. For example, if you enter 50, the report will print the top fifty customers with the highest sales dollars amount year-to-date.

5. Percent Option:

Type **P+** the **Enter** key to calculate and print the profit margin for each customer.

Type **S+** the **Enter** key to calculate and print the percentage of sales for each customer.

6. Cost/Prior Year:

Type **C+** the **Enter** key to include cost of sales dollars.

Type **P+** the **Enter** key to print prior year sales dollars.

Type **Y+** the **Enter** key to print sales for the period entered.

7. First Date:

Type the first date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

8. Last Date:

Type the last date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

9. Select the appropriate printer for this report.

Customer Analysis Report Sample

MS-WINDOWS - Adobe Reader

File Edit View Document Tools Window Help

1 / 1 PDF -

Madness Development Company
Customer Analysis Report, by Customer
Customers: 00-AR001 to 01-RR011

Page No: 1
Run Date: 11/04/2011
Run Time: 11/04/2011

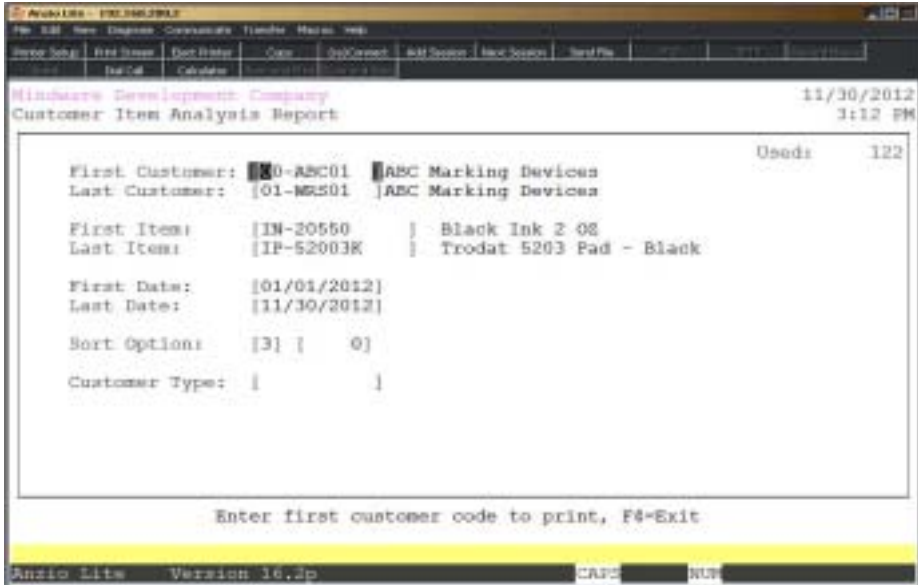
Customer Code	Customer Name	P-T-D Sales	Orig Sales No	% of	P-T-D Sales	% of	P-T-D Sales
			Inst. Desc	Value		Inst. Desc	Value
00-AR001	Web Marketing Services	300.00	00	33.33%	1,400.00	00	41.67%
00-RR001	Online Marketing	87.33	00	86.80%	1,224.30	00	34.00%
00-RR001	Graphic/Media/Stamp Co.	.00	00	.00%	493.12	00	14.00%
00-RR001	Web Gt. File Conversion	.00	00	.00%	24.70	00	.73%
		387.33	00	38.13%	1,142.12	00	33.40%
01-RR001	Website Design and Support	40.00	00	100.00%	100.00	00	100.00%
	Customer Totals:	427.33	00	100.00%	1,342.12	00	100.00%
	Report Totals:	387.33	00	100.00%	1,142.12	00	100.00%
	Total Listed:	1					

Customer Item Analysis Report

Overview

The Customer Item Analysis Report has three sort options: the report can be printed in item number order, in order by number of units sold and in order by the dollar amount of sales.

You can select a range of customers, items and a specified date range. You have the option to print report by item, units or sales and by customer type.



Procedure

1. Select Customer Item Analysis Report on the Sales Analysis Report Menu.

2. First Customer:

Type the first valid customer number and **Enter** or type ? to display the Customer Code Selection window.

3. Last Customer:

Type the last valid customer number and **Enter** or type ? to display the Customer Code Selection window.

4. First Item:

Type the first valid inventory item code and **Enter** or type ? to display the Item Code Selection window.

5. Last Item:

Type the last valid inventory item code and **Enter** or type ? to display the Item Code Selection window.

6. First Date:

Type the first date to include in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

7. Last Date:

Type the last date to include in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

8. Sort Option:

Type **1+** the **Enter** key to sort this report by item code.

Type **2+** the **Enter** key to sort this report by units sold.

Type **3+** the **Enter** key to sort this report by sales dollars.

Note: The system will prompt you for the number of items to print per customer or enter zero to list all.

9. Customer Type:

Type up to five customer types side by side, no commas or spaces required, or leave this field blank to list all.

10. Select the appropriate printer for this report.

Customer Item Analysis Report Sample

Mindware Development Company
 Customer Item Analysis Report, (Item) Page No: 1
 IN-20550 to IP-52003K Run Date: 11/27/2012
 11:43 AM 01/01/2012 to 11/30/2012, Type: Sys Date: 11/30/2012

 00-ABC01 - ABC Marking Devices to 01-NRS01 - Wilson Stamp and Sign Company

Item Code	Item Description	Units	Sales
IN-20550	Black Ink 2 OZ	11.0	44.50
IN-20555	Red Ink 2 OZ	11.0	44.00
IN-20577	Pink Ink 2 OZ	1.0	8.00
IP-52003K	Trodat 5203 Pad - Black	1.0	20.00
IN-20550	Black Ink 2 OZ	14.0	52.80
IN-20555	Red Ink 2 OZ	13.0	42.40
IN-20560	Blue Ink 2 OZ	2.0	6.40
IP-4911B	Trodat 4911 Pad - Blue	8.0	115.00
IP-52003K	Trodat 5203 Pad - Black	3.0	20.00
IN-20550	Black Ink 2 OZ	4.0	15.20
IN-20555	Red Ink 2 OZ	20.0	122.00
IN-20560	Blue Ink 2 OZ	1.0	2.40
IP-4911B	Trodat 4911 Pad - Blue	1.0	10.00
IN-20550	Black Ink 2 OZ	5.0	18.25
IN-20555	Red Ink 2 OZ	5.0	20.00
IP-4911B	Trodat 4911 Pad - Blue	2.0	20.00
IP-52003K	Trodat 5203 Pad - Black	3.0	30.00
Customer Summary:		113.0	591.00

Inventory Item Report

Overview

The Inventory Item Report lists each item within a product (segment) category. Information reported is item code and description, units period-to-date, sales dollars period-to-date, units year-to-date and sales dollars year-to-date. Report totals are reflected in segment totals and a combined report total of all segments. The totals do not include sales tax or shipping charges.

Minnesota Development Company 11/30/2012
S/A Inventory Item Analysis Report 11:45 AM

Used: 44

First to Print: [F4-20550]

Last to Print: [TF-4911R]

Sort Option: [1]

Include Cust: [N]

Include Vendor: [N]

Vendor Code: []

Enter first item code to print, ? for items
F4 = Return to menu

Anzio Lite Version 16.2p CAPS RUN

Procedure

1. Choose Inventory Item Analysis Report on the Sales Analysis report Menu.

2. First To Print:

Type the first inventory item to print and **Enter** or type **?** to display the Item Code Selection window.

3. Last To Print:

Type the last inventory item to print and **Enter** or type **?** to display the Item Code Selection window.

Press **F2** to return to the previous input field.

4. Sort Option:

Sales Analysis Reporting Menu

Type **1+** the **Enter** key to sort this report by inventory item code.

Type **2+** the **Enter** key to sort by P-T-D units.

Type **3+** the **Enter** key to sort by P-T-D sales.

Type **4+** the **Enter** key to sort by Y-T-D units.

Type **5+** the **Enter** key to sort by Y-T-D sales.

5. Include Cost:

Type **Y+** the **Enter** key to print P-T-D and Y-T-D sales and to include Y-T-D costs on this report.

Type **N+** the **Enter** key to print P-T-D and Y-T-D units and sales.

6. Include Vendor:

Type **Y+** the **Enter** key to include the item royalty vendor. Go to Step 7.

Type **N+** the **Enter** key to exclude the royalty vendor. Go to Step 8.

7. Vendor Code:

Type the vendor code to include and **Enter** or leave blank for all vendors.

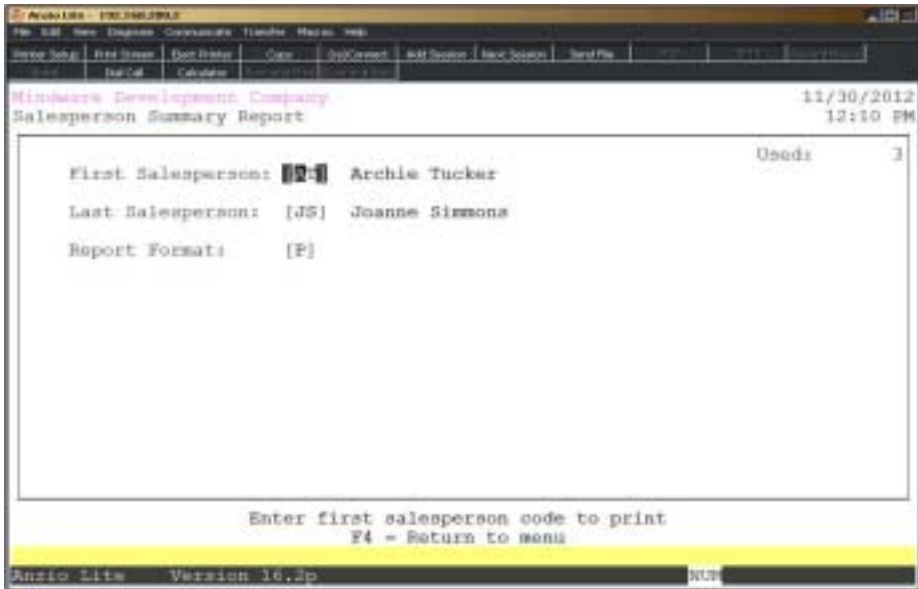
8. Select the appropriate printer for this report.

Salesperson Summary Report

Overview

The Salesperson Summary Report by (C)ommission lists PTD sales and commission, YTD sales and commission and Prior Year sales and commission dollars. The Salesperson Summary Report by (P)rofit Margin list PTD sales and profit and the percentage of profit margin.

Totals are in summary form by salesperson and a combined report total for all salespersons. Totals do not include sales tax and shipping charges.



Procedure

1. Choose Salesperson Summary Report on the Sales Analysis Report Menu.
2. First Salesperson:
Type the first salesperson to print and **Enter** or type **?** to display the Salesperson Selection window.
3. Last Salesperson:
Type the last salesperson to print and **Enter** or type **?** to display the Salesperson Selection window.
4. Press **F2** to return to the previous input field.

5. Report Format:

Type **C+** the **Enter** key to print sales and commission dollars.

Type **P+** the **Enter** key to print sales and profit margin percentages.

6. Select the appropriate printer for this report.

Salesperson Summary Report Sample

Windsor Development Company
Salesperson Summary Report

Page No: 1
Run Date: 11/27/2012
By: User: 11/26/1011

Salesperson	I-S-D Sales	I-S-D Costs	I-S-D Profit	Profit Margin	I-S-D Sales	Total Sales
01 Archie Tucker	.00	.00	.00	.00	.00	.00
02 Bruce Bennett	412.01	37.04	375.01	91.01%	1,402.27	1,264.22
03 James Stanton	224.00	41.00	183.00	82.14%	861.00	1,011.00
Report Total:	636.01	78.04	557.97	87.73%	2,263.27	2,275.22

Salesperson Weekly Detail Report

Overview

The Salesperson Weekly Detail Report can be printed by a salesperson or a group of salespersons for specific weeks within a specific year. Totals are by product categories with an option to include invoices with zero commissions.

Minshara Development Company
 S/A Salesperson Weekly Detail Sales Report

11/30/2012
 12:12 PM

First Salesperson: [2-] Archie Tucker
 Last Salesperson: [J5] Joanne Simmons

Sales Year: [2012]

First Week Number: [01]
 Last Week Number: [49]

Zero Commissions: [N]

Product Category: []

Used: 57

Enter first salesperson code to print, ? = salespersons
 F4 = Return to menu

Anzio Lite Version 16.2p

Procedure

1. Choose Salesperson Weekly Detail Report on the Sales Analysis Report Menu.
2. First Salesperson:
Type a valid salesperson code and **Enter** or type **?** to display the Salesperson Code Selection window.
Press **F4** to return to the Sales Analysis Report Menu.
3. Last Salesperson:
Type a valid salesperson code and **Enter** or type **?** to display the Salesperson Code Selection window.
Press **F2** to return to the previous input field.
4. Sales Year:
Press the Enter key to accept the default year displayed or type the year to print in YYYY format and **Enter**.

Sales Analysis Reporting Menu

5. First Week Number:

Press the **Enter** key to accept the default week displayed or type the first week to print and **Enter**.

6. Last Week Number:

Press the **Enter** key to accept the default week displayed or type the first week to print and **Enter**.

7. Zero Commissions:

Type **Y+** the **Enter** key to include sales with zero commission amounts.

Type **N+** the **Enter** key not to list zero commission amounts.

8. Product Category:

Type the product category to highlight on this report and **Enter** or type **?+** the **Enter** key to display the Product Category Selection window.

9. Select the appropriate printer for this report.

Salesperson Weekly Detail Report Sample

WinVista Development Company

Page No: 1

12-12-08 0/N Salesperson Weekly Detail Sales Report Run Date: 11/27/2011

Salesperson: 07 to 08, Year: 2012, Week: 16 to 20 App Date: 11/24/2011

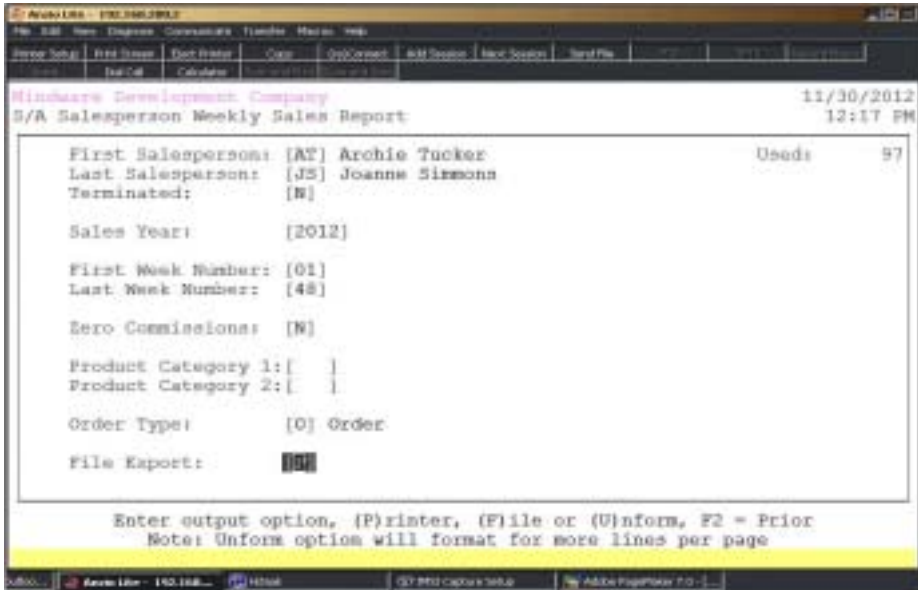
30 Journal Entries

Week	WC	Sales		Order		Totals	Y.T.D. Sales	Y.T.D. Order	Yariance		
		Sales	Order	Sales	Order						
41	08	.00	0.0	.00	0.0	20.00	0.	20.00	10.00	.00	10.00
41	08	.00	0.0	.00	0.0	.00	0.	.00	20.00	.00	20.00
39	08	.00	0.0	.00	0.0	21.00	7.	21.00	10.10	.00	10.10
34	08	.00	0.0	.00	0.0	22.00	0.	22.00	70.10	.00	70.10
41	08	.00	0.0	.00	0.0	22.00	2.	22.00	94.20	.00	94.20
40	08	40.00	10.0	.00	0.0	.00	0.	40.00	116.20	.00	116.20
Totals:		40.00	10.0	.00	0.0	84.00	10.0	104.00			
Averages:		8.00	2.0	.00	0.0	16.80	2.0	20.80	Y.T.D. Commission:		0.10
									Y.T.D. Order Year:		.00

Salesperson Weekly Sales Report

Overview

The Salesperson Weekly Sales Report lists units and sales for each week specified, prior year sales and units and a salesperson summary by week showing minimum and maximum variances.



Procedure

1. Choose Salesperson Weekly Sales Report on the Sales Analysis Report Menu.
2. First Salesperson:
Type a valid salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.
Press **F4** to return to the Sales Analysis Report Menu.
3. Last Salesperson:
Type a valid salesperson code and **Enter** or type ? to display the Salesperson Code Selection window.
Press **F2** to return to the previous input field.
4. Terminated:
Type **Y+** the **Enter** key to include terminated salespersons on this report.

Type **N+** the **Enter** key to exclude terminated salespersons on this report.

5. Sales Year:

Press the **Enter** key to accept the default year displayed or type the year to print in YYYY format and **Enter**.

6. First Week Number:

Press the **Enter** key to accept the default week displayed or type the first week to print and **Enter**.

7. Last Week Number:

Press the **Enter** key to accept the default week displayed or type the first week to print and **Enter**.

8. Zero Commissions:

Type **Y+** the **Enter** key to include sales with zero commission amounts.

Type **N+** the **Enter** key not to list zero commission amounts.

9. Product Category 1:

Type the first product category to print and **Enter** or type **?** to display the Product Category Selection window.

10. Product Category 2:

Type the second product category to print and **Enter** or type **?** to display the Product Category Selection window.

11. Order Type:

Type a valid order type and **Enter** or type **?** to display the Order Type Selection window.

Note: Order type must be set in 'Sales Analysis Parameters' on the Sales Analysis Definition Menu.

12. File Export:

Type **P+** the **Enter** key to print this report to a printer.

Type **F+** the **Enter** key to export this report to a file (SAWS41.TXT) in the /TOP/EXPORT directory.

Type **U+** the **Enter** key to use UnForm to format more lines per page on this report.

13. Select the appropriate printer for this report.

Salesperson Weekly Sales Report Sample

Print Preview

File Page View Help

Page: 1 of 1

Your Company name
 1/1 Salesperson Weekly Sales Report
 Salesperson: 05 to 05, Year: 2005, Weeks: 01.00 to 05

Page no: 1
 Run Date: 05/05/2005
 Sys Date: 05/05/2005

05 Bob Smith

Week	PC	Order		Quote		Order		Totals	Y-T-D Sales	Y-T-D Prior	Variance
		Sales	units	Sales	units	Sales	units				
01	00	.00	0	.00	0	11.95	1	11.95	11.95	.00	11.95
02	00	.00	0	.00	0	.00	0	.00	11.95	.00	11.95
03	00	.00	0	.00	0	140.18	30	140.18	151.13	.00	151.13
04	00	.00	0	.00	0	37.00	50	37.00	188.13	.00	188.13
05	00	.00	0	.00	0	11.00	1	11.00	207.93	.00	207.93
05	05	500.00	100	400.00	75	300.00	50	1,200.00	1,407.93	.00	1,407.93
Totals:		500.00	100	400.00	75	507.93	131	1,407.93			
Averages:		100.00	20	80.00	15	101.58	26	281.58	Y-T-D Commission: 207.84	Y-T-D Prior Year: .00	

Salesperson Current Week Sales Report

Overview

The Salesperson Current Week Sales Report can be printed by a salesperson or a group of salespersons for a specific week within a given year. Totals are by product categories, with an option to include invoices with zero commissions and specific order types.

ANALYSIS - PRELIMINARY

File Edit View Database Commands Transfer Macro Help

Print Setup Print Screen Data Printer Copy Copy/Overwrite Full Screen Next Screen First Page

Winchare Development Company 11/30/2012
S/A Salesperson Current Week Sales Report 12:42 PM

Usage: 97

First Salesperson: [F2] Archie Tucker
Last Salesperson: [J5] Joanne Simmons
Sales Year: [2012]
Week Number: [48]
Managers: [N]
Zero Commissions: [N]
Product Category 1: []
Product Category 2: []
Order Type: [0] Order

Enter first salesperson code to print, ? = salespersons
F4 = Return to menu

Procedure

1. Choose Salesperson Current Week Sales Report on the Sales Analysis Report Menu.
2. First Salesperson:
Type a valid salesperson code and **Enter** or type **?** to display the Salesperson Code Selection window.
Press **F4** to return to the Sales Analysis Report Menu.
3. Last Salesperson:
Type a valid salesperson code and **Enter** or type **?** to display the Salesperson Code Selection window.
Press **F2** to return to the previous input field.
4. Sales Year:

Sales Analysis Reporting Menu

Press the Enter key to accept the default year displayed or type the year to print in YYYY format and **Enter**.

5. Week Number:

Type the week number to print and press the Enter key.

6. Managers:

Type **Y+** the Enter key to include manager sales on the weekly report.

Type **N+** the Enter key not to include manager sales.

7. Zero Commissions:

Type **Y+** the **Enter** key to include sales with zero commission amounts.

Type **N+** the **Enter** key not to list zero commission amounts.

8. Product Category 1:

Type the first product category to print and **Enter** or type **?** to display the Product Category Selection window.

9. Product Category 2:

Type the second product category to print and **Enter** or type **?** to display the Product Category Selection window.

10. Order Type:

Type a valid order type and **Enter** or type **?** to display the Order Type Selection window.

Note: Order type must be set in 'Sales Analysis Parameters' on the Sales Analysis Definition Menu.

11. Select the appropriate printer for this report.

Salesperson Current Week Sales Report Sample

Print Preview

File Page View Help

Page: 1 of 1

3000 J Net Company Name Page No: 1
 14041 10th Salesperson Current Week Sales Report Run Date: 04/04/2000
 1:01 PM Salesperson: SA to W, Year: 1999, week: 31 Sys Date: 02/04/2000

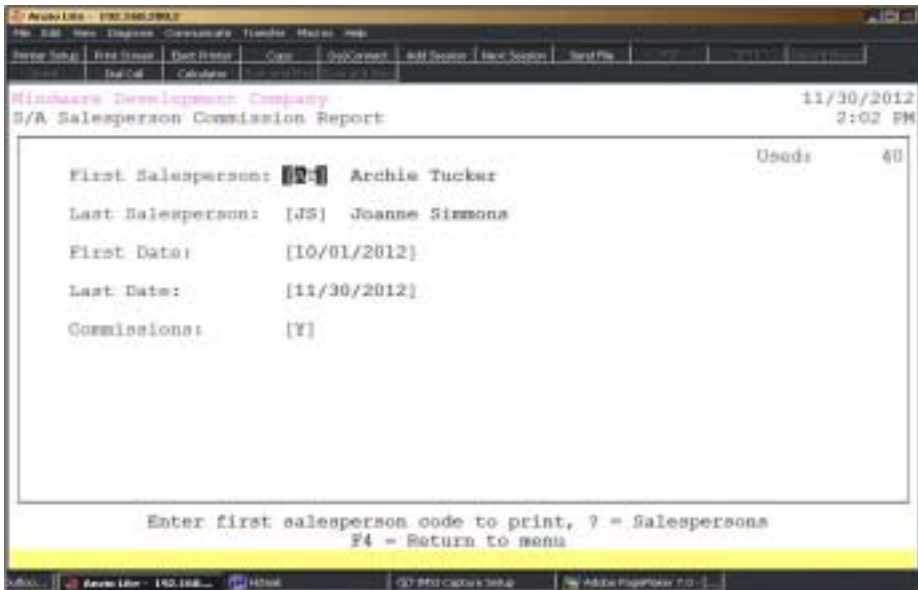
Salesperson name	ART RUBBER STAMPS			X-STAMPER			OTHER PRODUCTS			Carriage overage	
	Order	Other	Total	Order	Other	Total	Order	Other	Total		
Bill Adams	0	45	45	1	0	0	0	0	40	40	1
Bob Smith	0	0	0	0	0	0	0	0	29	29	0
Robert Adams	0	0	0	0	0	0	0	0	26	26	0
Report Totals:	0	45	45	1	0	0	0	0	95	95	

Salesperson Commission Report

Overview

The Salesperson Commission Report lists totals for each salesperson selected for this report. The information includes the invoice number and date, the ship-to name, address and telephone number, the product category of the items sold, the sales dollar amount and the amount of commission calculated for this category.

The report summarizes the product categories, commissions and reserve amounts by salesperson.



Procedure

1. Choose Salesperson Commission Report on the Sales Analysis Report Menu.

2. First Salesperson:

Type the first salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

3. Last Salesperson:

Type the last salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

4. First Date:

Type the beginning invoice date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

Press the **Spacebar** to print all invoices.

5. Last Date:

Type the ending invoice date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

Press the **Spacebar** to print all invoices.

6. Commissions:

Type **Y+** the **Enter** key to list sales with zero commissions.

Type **N+** the **Enter** key not to include zero commissions.

7. Select the appropriate printer for this report.

Salesperson Commission Report Sample

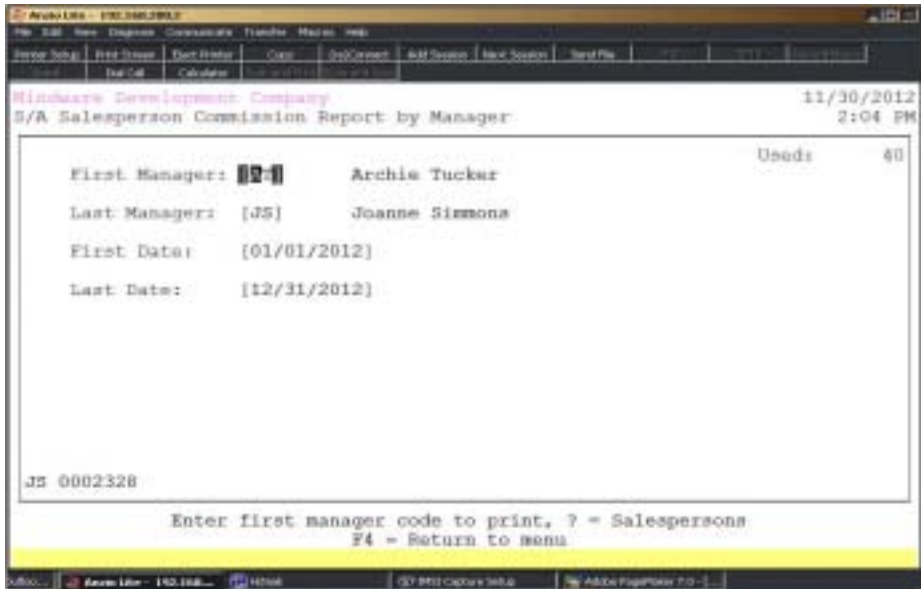
The screenshot shows a software application window with a menu bar (File, Edit, View, Document, Tools, Window, Help) and a toolbar. The main content area displays a report for 'Wizards Development Company' for salesperson 'Jill'. The report includes a header with the salesperson's name, company, and report type, followed by a table of commission entries. The table has columns for Invoice Number, Invoice Date, Description, Invoice Number, Description, Credit Amount, Date Entered, and Commission Total.

Invoice Number	Invoice Date	Description	Invoice Number	Description	Credit Amount	Date Entered	Commission Total
004276	0 10/19/11	OnSite Engineering 150 East Wacker JULIE 200 WHEELS 02 01111	001-01-0-12	Tab	2.00		.00
004277	0 10/19/11	OnSite Engineering 150 East Wacker JULIE 200 WHEELS 02 01111	001-01-0-12	Tab	4.00		.00
004280	0 10/19/11	Greater Wabaco Stamp Co 200 North Central WHEELS 02 01111	001-01-0-03	Business Card Tab	80.00 7.00		.00
004281	0 10/19/11	Greater Wabaco Stamp Co 200 North Central WHEELS 02 01111	001-01-0-03	Business Card Tab	24.00 1.75		.00
004284	0 10/19/11	Greater Wabaco Stamp Co 200 North Central WHEELS 02 01111	001-01-0-03	Business Card Expensed Stamp	.00 6.12		.00

Salesperson Commission Report By Manager

Overview

The Salesperson Commission Report By Manager list the invoices for each manager within a specified date range. Information listed includes each invoice number and date, ship-to name, address and telephone number, product category sales dollars and amount of commission for each invoice.



Procedure

1. Choose Salesperson Commission Report By Manager on the Sales Analysis Report Menu.

2. First Manager:

Type the first salesperson manager code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

3. Last Salesperson:

Type the last salesperson manager code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

4. First Date:

Sales Analysis Reporting Menu

Type the beginning date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

5. Last Date:

Type the ending date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

Salesperson Commission By Manager Report Sample

Print Preview

File Page View Help

Page: 1 of 2

Your Company name
 1/6 Salesperson Commission Report by Manager
 Managers: SA to SA, 02/01/1999 to 11/30/1999

Page no: 1
 Run Date: 11/31/1999
 Sys Date: 11/31/1999

Manager: SA - Bill Adams Salesperson: SA - Bob Smith

Invoice number	Invoice Date	Description	Phone number	Description	Product Category	Sales Amount	Commission Total
000460	04/30/99	Scar Hologr 300 Main Street Las Vegas NV 89004	SA 702-894-3023	Art Rubber Stamps		0.00	.00
000467	01/31/99	Scar Hologr 300 Main Street Las Vegas NV 89004	SA 702-894-3023	Art Rubber Stamps		0.00	.00
000461	01/31/99	3 Times cost for preparation	SA - -	Art Rubber Stamps		250.00	.00

Product Summary

	Items	Unit	Fee	Phone	Order	Total
Art Rubber Stamps	.00	.00	.00	.00	250.00	250.00
Summary:	.00	.00	.00	.00	250.00	250.00

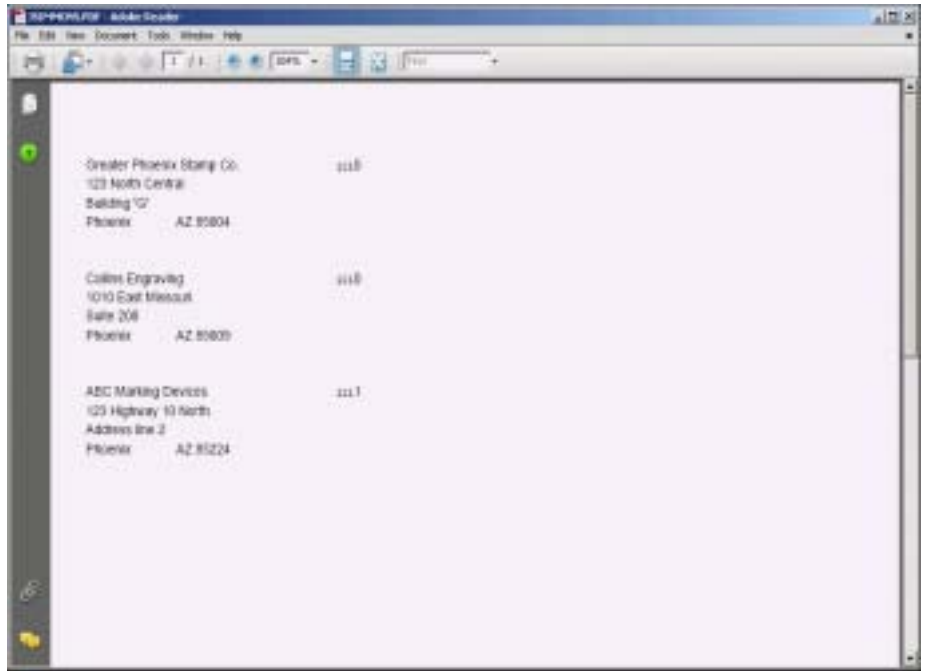
Reserve Account

Beginning Reserve:	5.00
Commission Deductible:	.00

Commission Summary

Commission Total:	.00
Adjustments:	.00

Salesperson Customer Mailing Labels Sample

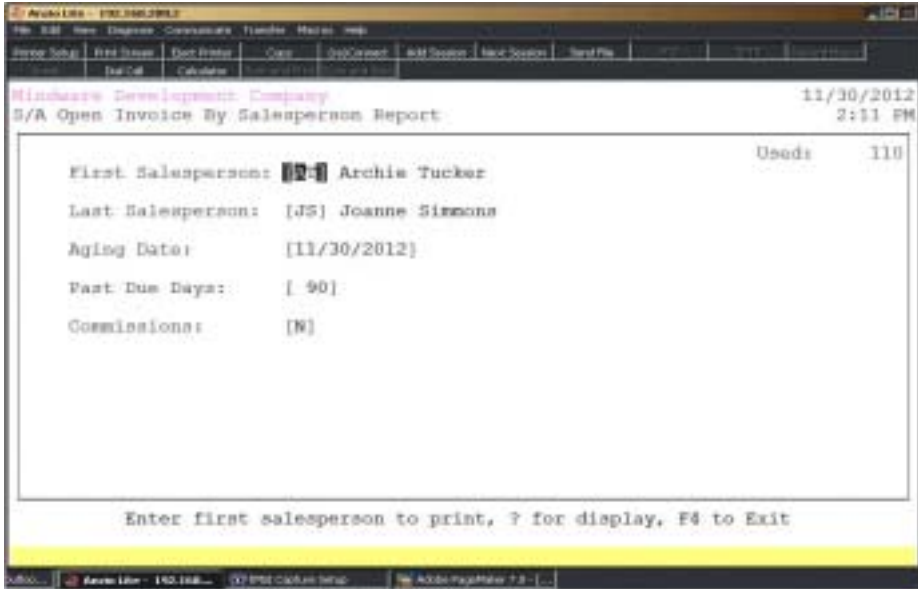


Open Invoices By Salesperson

Overview

The Open Invoices By Salesperson Report can be printed for one salesperson or a range of salespersons within a specified aging date with an option to include invoices only with a commission amount.

Listing includes invoice number and date, number of days to pay, ship-to name, address and telephone number, purchase order number, order type and invoice totals.



Procedure

1. Select Open Invoices By Salesperson on the Sales Analysis Report Menu.

2. First Salesperson:

Type the first salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F4** to abort the report and return to the Sales Analysis Report Menu.

3. Last Salesperson:

Type the last salesperson code to print and **Enter** or type **?** to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

4. Aging Date:

Type the date to age invoices from in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

5. Past Due Days:

Type the number of days past due that you want to age invoices from and **Enter**.

6. Commissions:

Type **Y+** the **Enter** key to only include invoices on this report that are associated with a commission.

Type **N+** the **Enter** key not to include invoices with commission only.

7. Select the appropriate printer for this report.

Open Invoices By Salesperson Report Sample

Windows Explorer - Salesperson

File Edit View Document Tools Window Help

Address: [Blank]

Windows Development Company
 Page: 1
 A/S Open Invoices By Salesperson Report
 Run Date: 11/01/2011
 2:12 PM Salesperson: ST - JE Aging Date: 11/01/2011 Past Due Date: 01. Commission: 0
 Sys Date: 11/01/2011

W - Salesperson

Inv No	Inv Date	Days	Ship-To Name & Address	Phone No	SI Number	Inv Amount	Inv Balance	Type
001001	07/16/2011	001	Greater Florida Stamp Co 210 North Central Florida JE 0100	901-898-8110		8.78	1.78	0
001002	07/16/2011	001	Greater Florida Stamp Co 210 North Central Florida JE 0100	901-898-8110		11.12	11.12	0
001003	10/06/2011	001	Collins Engineering 100 West Missouri Suite 310 Florida JE 0100	901-898-2112		28.10	28.10	0
001004	10/10/2011	007	AM Printing Center 111 Highway 19 North Florida JE 0100	901-898-7800		28.20	28.20	0
001005	11/15/2011	001	Greater Florida Stamp Co 210 North Central Florida JE 0100	901-898-8110		11.98	11.98	0
001006	11/15/2011	001	Collins Engineering Suite 310 Florida JE 0100	901-898-2112		26.12	26.12	0

Salesperson Invoice Report (History)

Overview

This report is designed to reflect a salesperson's invoice and payment history within specific date ranges. You have the option to print detailed and summary formats, to include purchase order numbers, to print paid invoices only and include cash receipts history.

The screenshot shows a terminal window titled "Mitsubashi Development Company" with the date "11/30/2012" and time "2:39 PM". The main title is "S/A Salesperson Invoice Report From Invoice History". The configuration fields are as follows:

First Salesperson:	[F2] Archie Tucker	Used:	122
Last Salesperson:	[J5] Joanne Simmons		
First Invoice Date:	[07/01/2012]	Last Invoice Date:	[11/30/2012]
First C/R Date:	[07/01/2012]	Last C/R Date:	[11/30/2012]
Format Option:	[2]		
Include PO:	[N]		
Paid Only:	[N]		
C/R Detail:Only:	[N]		
Include C/R Detail:			

At the bottom of the screen, there is a yellow bar with the text: "Enter first salesperson code to print, ? = Salespersons" and "F4 = Return to menu".

Procedure

1. Select Salesperson Invoice Report From Invoice History on the Sales Analysis Report Menu.

2. First Salesperson:

Type the first salesperson for this report and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F4** to return to the Sales Analysis Definition Menu.

3. Last Salesperson:

Type the last salesperson for this report and **Enter** or type ? to display the Salesperson Code Selection window.

Press **F2** to return to the previous input field.

Sales Analysis Reporting Menu

4. First Inv Date:

Type the first invoice date to include on this report in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

5. Last Inv Date:

Type the last invoice date to include on this report in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

6. First C/R Date:

Type the first cash receipt date to include on this report in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

7. Last C/R Date:

Type the last cash receipt date to include on this report in MMDD format and **Enter**. No dashes or slashes are required. The system will insert the current century and year.

8. Format:

Type **1+** the **Enter** key to print the report in detail format.

Type **2+** the **Enter** key to print the report in detail and summary format.

Type **3+** the **Enter** key to print the report in summary format only.

Type **4+** the **Enter** key to print the invoice header information only. Go to Step 8.

7. Include PO:

Type **Y+** the **Enter** key to print the purchase order number on this report.

Type **N+** the **Enter** key not to print the purchase order number.

8. Print Paid Only:

Type **Y+** the **Enter** key to print paid invoices only.

Type **N+** the **Enter** key to list all invoices on this report.

9. Include C/R Detail:

Type **Y+** the **Enter** key to include cash receipt payment detail on this report.

Type **N+** the **Enter** key to exclude cash receipt information.

10. Select the appropriate printer for this report.

Salesperson Invoice Report Sample

Windows Developer Company Page No: 1

Malik All Salesperson Invoice Report From Invoice History Run Date: 11/30/2012

2:14 PM Salesperson: AT to BE, 01/01/2002 to 11/30/2012 Sys Date: 11/30/2012

W - Bonus Amount

Invoice Date	Invoice Number	Customer Code	Item Code	Item Description	Shipped Qty	Unit Price
06/18/12	0002268	00-CB001	00 Colliac Engineering IP-01100	Black Ink 1 00	3.0	10.00
06/22/12	0002268	00-CB001	00 Colliac Engineering IP-01100	Red Ink 2 00	3.0	12.00
10/06/12	0002270	00-CB001	00 Colliac Engineering IP-01100	Black Ink 1 00	2.0	4.00
10/06/12	0002270	00-CB001	00 Colliac Engineering IP-01100	Red Ink 2 00	3.0	15.00
10/06/12	0002270	00-CB001	00 Colliac Engineering IP-01100	Red Ink 2 00	2.0	8.00
10/06/12	0002270	00-CB001	00 Colliac Engineering IP-01100	Black Ink 1 00	1.0	10.00
10/06/12	0002270	00-CB001	00 Colliac Engineering IP-01100	Black Ink 1 00	1.0	0.00
10/06/12	0002270	00-CB001	00 Colliac Engineering IP-01100	Red Ink 2 00	1.0	2.40
10/10/12	0002277	00-CB001	00 Colliac Engineering IP-01100	Blue Ink 1 00	1.0	8.00
10/10/12	0002279	00-CB001	00 Colliac Engineering IP-01100	Trouser 1001 Pant - Black	1.0	10.00
10/10/12	0002280	00-CB001	00 Colliac Engineering IP-01100	Trouser 4001 Pant - Blue	2.0	10.00
10/10/12	0002281	00-CB001	00 Colliac Engineering IP-01100	Trouser 5001 Pant - Black	2.0	10.00
10/10/12	0002282	00-CB001	00 Colliac Engineering IP-01100	Black Ink	1.0	1.75
			IP-01100	Black Ink	1.0	1.75
			BC-0100	Business Card Style Number 01	1.0	10.00
			BC-0100	Business Card Style Number 01	2.0	60.00
10/10/12	0002283	00-CB001	00 Colliac Engineering IP-01100	Business Card Style Number 01	1.0	10.00
			IP-01100	Black Ink	1.0	1.75
10/11/12	0002284	00-CB001	00 Colliac Engineering IP-01100	Business Card Style Number 01	0	0.00
			00-C-1000	L X E 10 Engraved Sign	1.0	6.25
10/11/12	0002285	00-CB001	00 Colliac Engineering IP-01100	Blue Ink 1 00	1.0	2.40
10/11/12	0002286	00-CB001	00 Colliac Engineering IP-01100	Red Ink 2 00	4.0	8.00

5

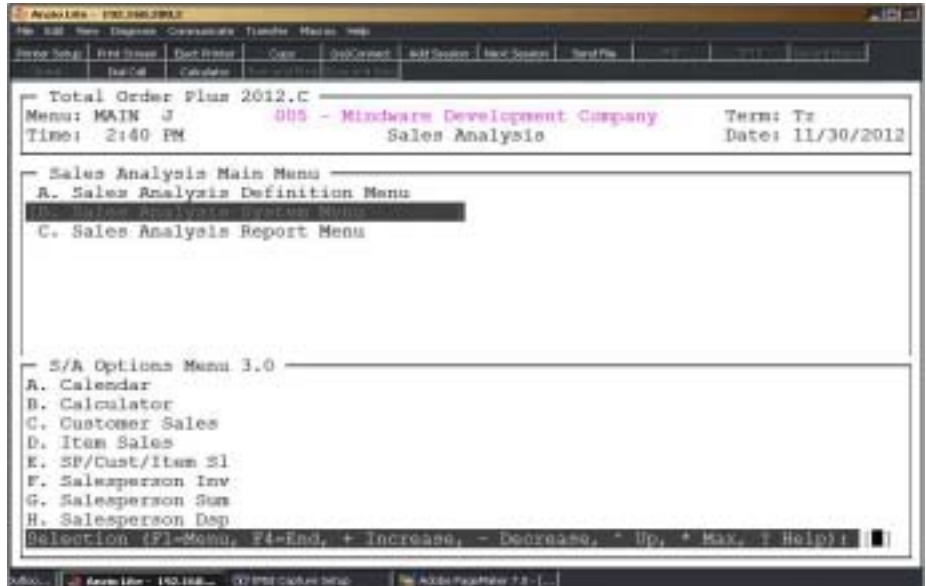
SALES ANALYSIS OPTIONS MENU

- Calendar**
- Calculator**
- Customer Sales**
- Item Sales**
- Salesperson/Customer/Item**
- Salesperson Invoices**
- Salesperson Summary**
- Salesperson Display**

Sales Analysis Options Menu

Overview

The Sales Analysis Options Menu allows you to view customer sales, item sales, salesperson by customer by item sales, salespersons invoices and salespersons sales summary. You can maintain salesperson percentages or add new salespersons from the options menu. See how to access an options menu in the 'TOP Introduction' section elsewhere in this manual.



Calendar

The calendar display three months at a time, beginning with the current month, highlighting today's date. You have the option to enter another month and year (MMYY format) you want to view or press the **Enter** key to the next two months. Press **F4** to return to the Sales Analysis Options Menu.

Note: See the 'TOP Introduction' section elsewhere in this manual.

Calculator

The calculator allows the user to add, subtract, multiply or divide numeric functions. Each function key has its own specific instruction to perform. The calculator can be displayed from several places in the system. Press **F9** to exit the calculator program and return to the Sales Analysis Options Menu.

Note: See the 'TOP Introduction' section elsewhere in this manual.

Customer Sales

Period-To-Date and Year-To-Date cost and sales dollars display in customer code order. Press the **Enter** key to continue the display or enter a valid customer code to advance the display forward or backward. Press **F4** to return to the Sales Analysis Options Menu.

Item Sales

Period-To-Date and Year-To-Date units and sales dollars display in item code order. Press the **Enter** key to continue the display or enter a valid item code to advance the display forward or backward. Press **F4** to return to the Sales Analysis Options Menu.

Salesperson by Customer by Item

Period-To-Date units, cost and sales dollars display in salesperson code order. Press the **Enter** key to continue the display or enter a valid salesperson code to advance the display forward or backward. Press **F4** to return to the Sales Analysis Options Menu.

Salesperson Invoices

All invoices for the current period display in salesperson code order. Information includes invoice number, customer code and name, total amount of each invoice, total amount of sales with commission and the amount of commission calculated. Press the **Enter** key to continue the display or enter a valid salesperson code to advance the display forward or backward. Press **F4** to return to the Sales Analysis Options Menu

Salesperson Summary

Total sales for each salesperson processed during this period is summarized into sales and commission Period-to-date and Year-To-Date. Press the **Enter** key to continue the display or enter a valid salesperson code to advance the display forward or backward. Press **F4** to return to the Sales Analysis Options Menu

Salesperson Display

You can view existing salespersons in salesperson display. See 'Salesperson Maintenance' located elsewhere in this section.