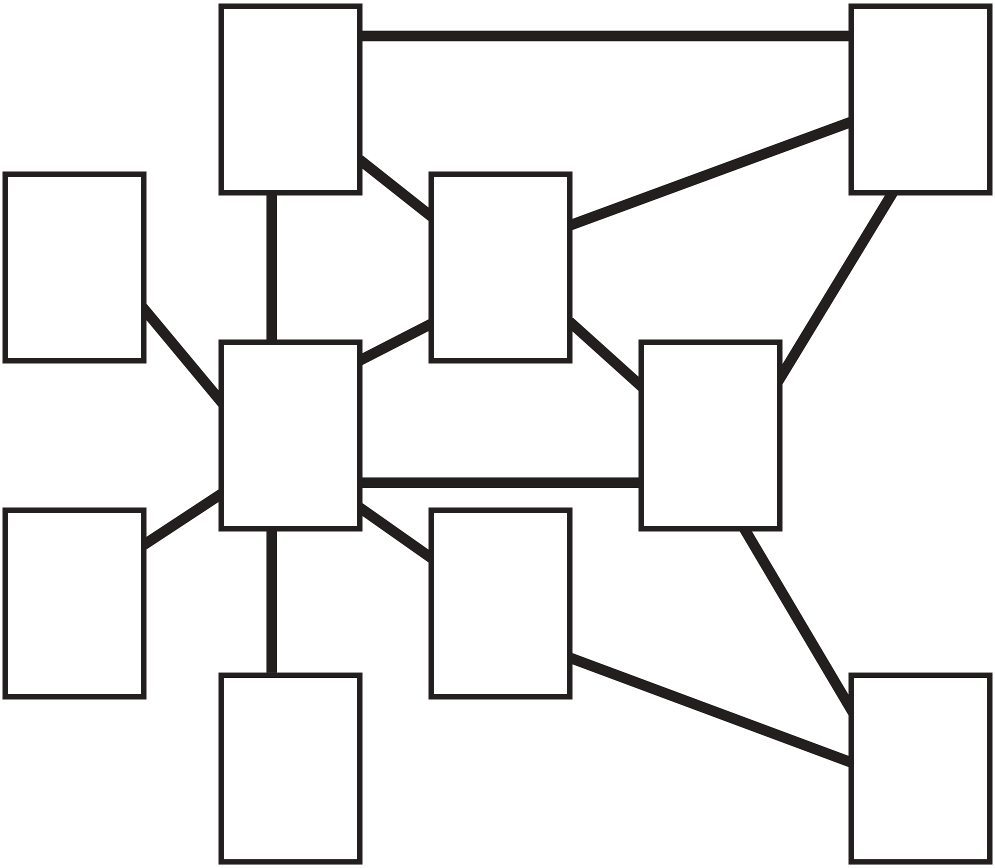
Total Order Plus
Integrated Accounting Series
Sales Analysis

Mindware Corporation
Of America

Integrated Accounting Series



Total Order Plus Sales Analysis User Guide

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Printed in the United States of America

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INTRODUCING THE SALES ANALYSIS SYSTEM

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

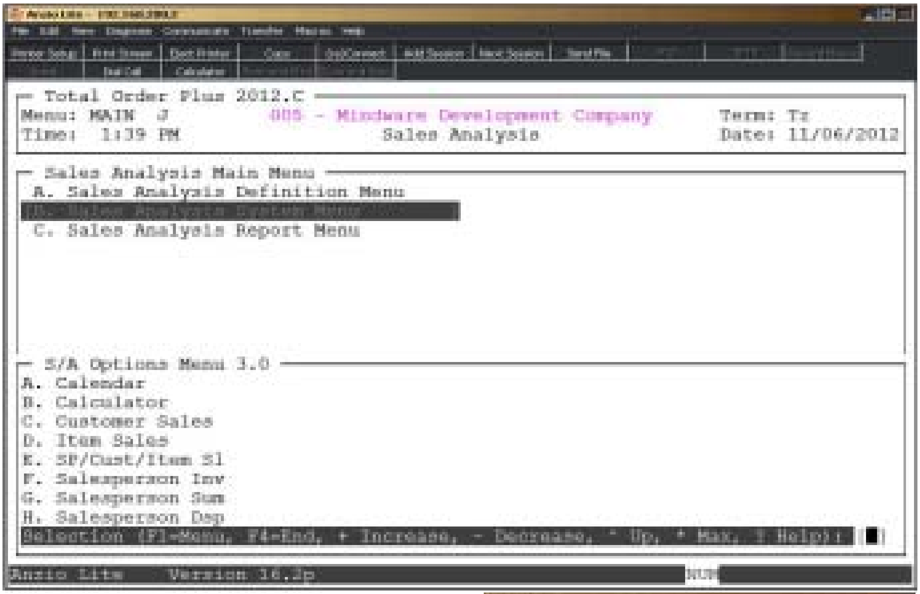
The Sales Analysis reporting system provides management reporting by salespersons, customers and inventory items in detailed and summary format. The reporting offers visual tracking of production month-to-date and year-to-date, along with customer sales dollars and profit margins and lists inventory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

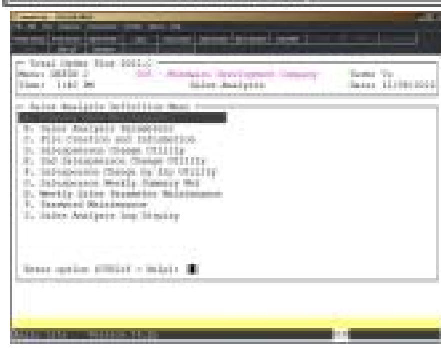
The month-to-date and year-to-date sales information can also be viewed in the Inventory module. See 'Item Balance & Sales Display' on the Inventory Masterfile Sub-Menu. You can also add a new salesperson or edit salespersons information using Salesperson Maintenance.

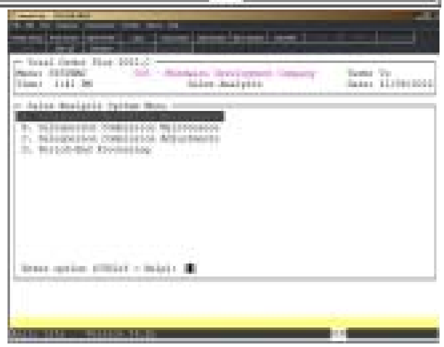
Part 5: Sales Analysis Options Menu

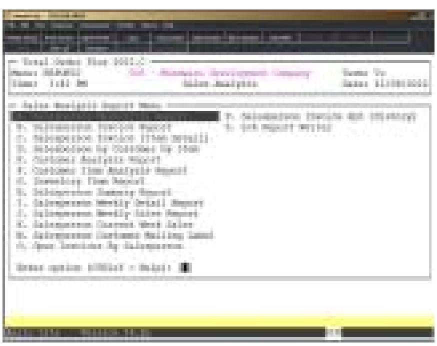
The options menu allows you to view customer sales, item sales, salesperson by customer by item sales, salespersons invoices and salespersons sales summary. You can maintain salesperson commission levels or add new salespersons from the options menu.

Sales Analysis Menu Structure









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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.

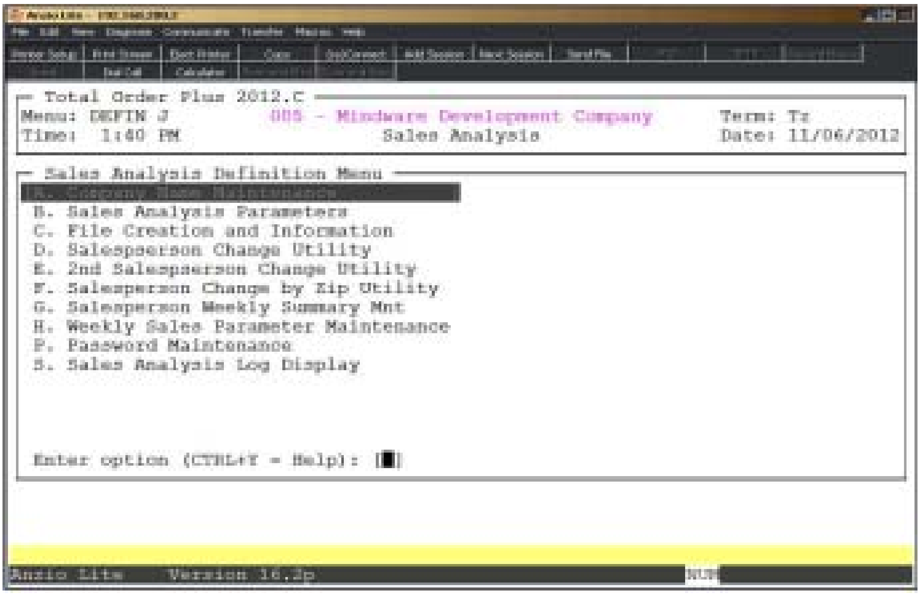
Order Entry Parameters and Inventory File Sizing have an effect on the Sales Analysis system. The following can help you set correct parameters:

- 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**.

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.

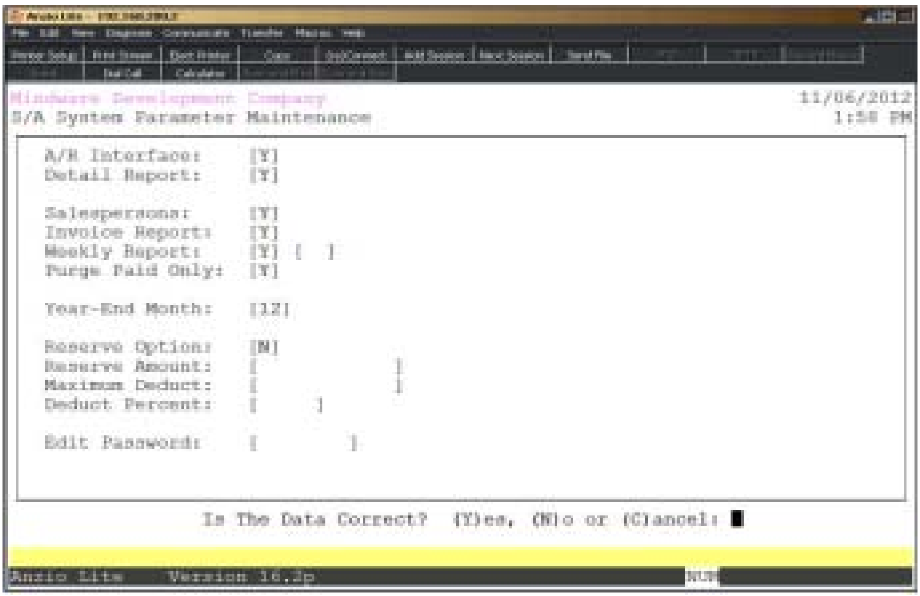
Type **D** to delete the company information.

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.

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.*

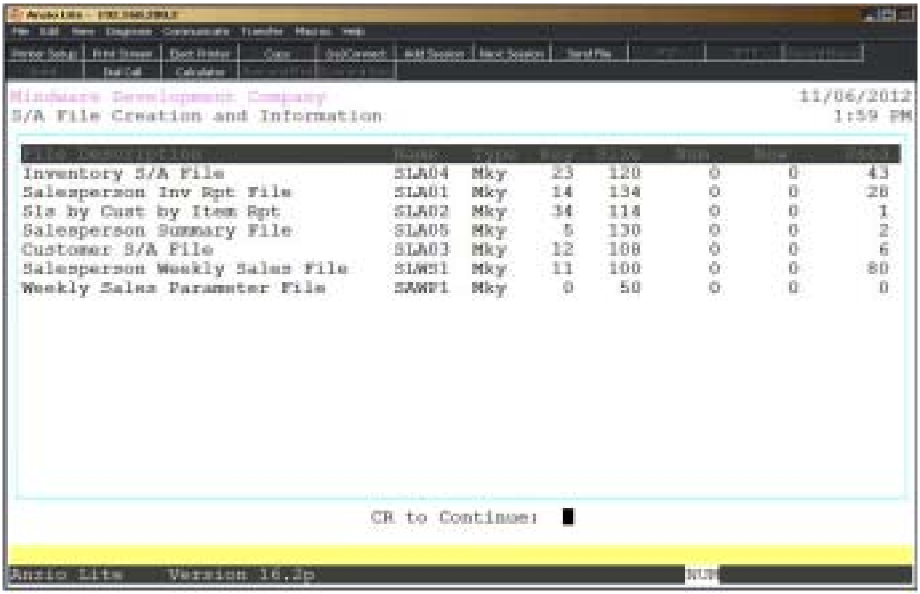
*Type **N** to return to the General Ledger Definition Menu without saving any changes.*

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.

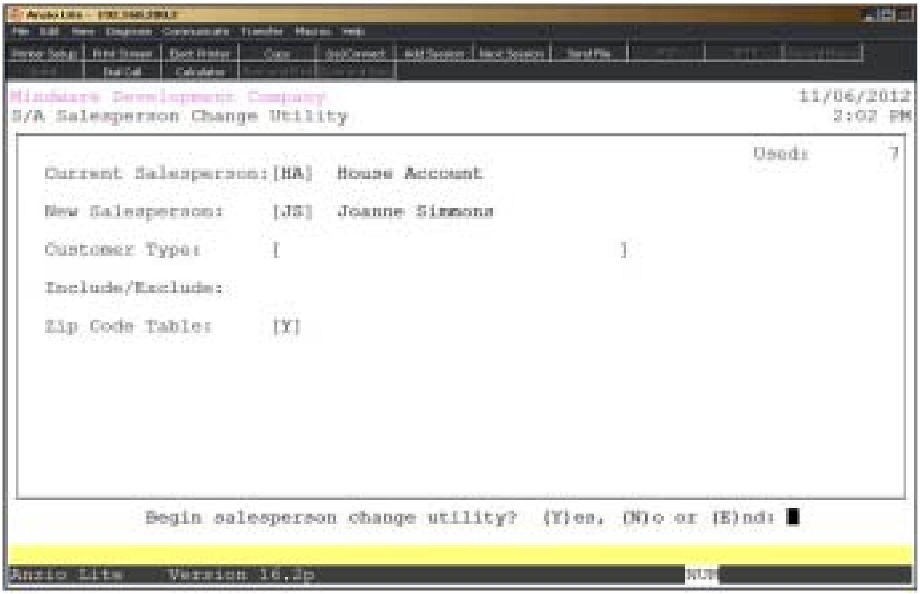


Salesperson Change Utility

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.

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:

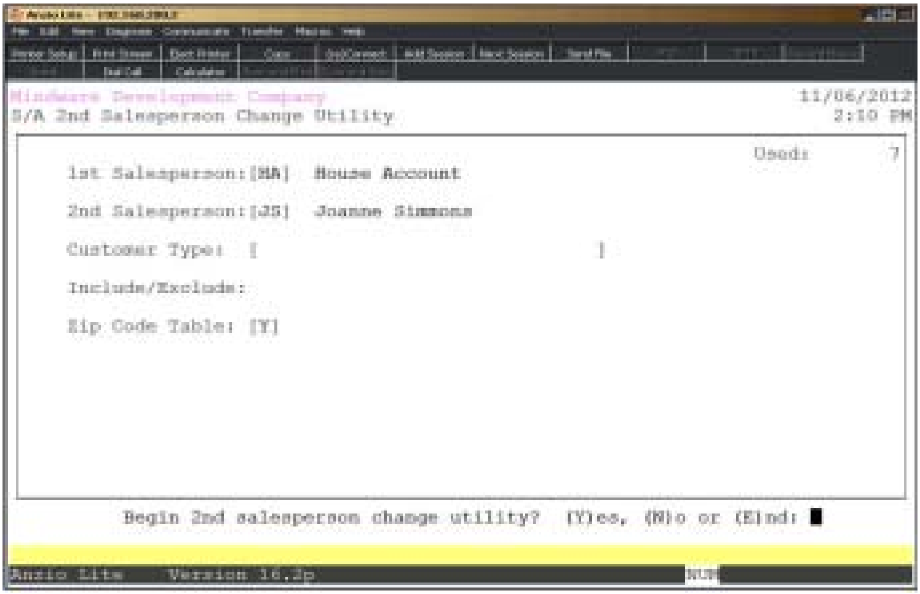
Press the **Enter** key to return to the Sales Analysis Definition Menu.

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.

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.

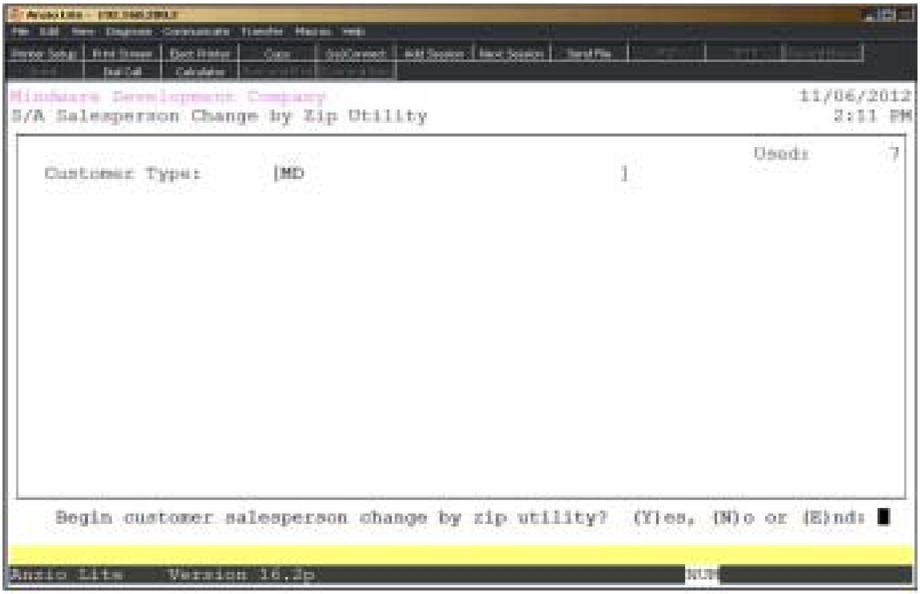
8. 2nd salesperson change utility completed, CR to continue:

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.

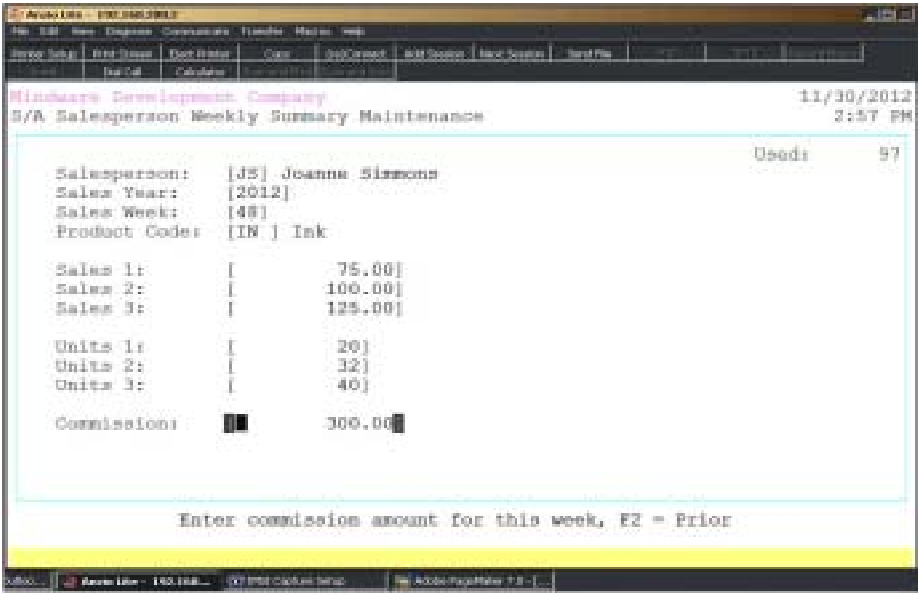
Type **N** to edit the customer types. Return to Step 2.

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.

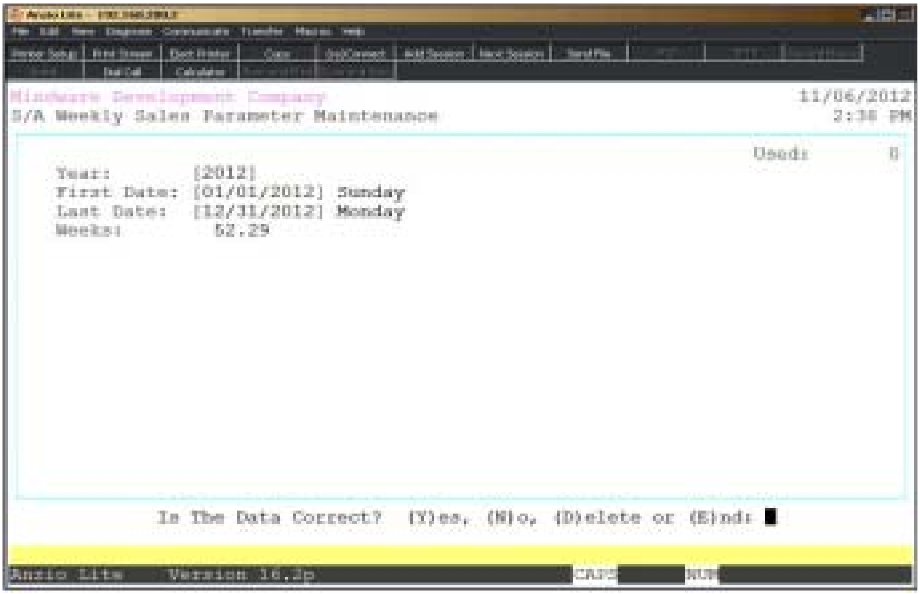
Type **D** to remove this record completely and go to Step 2.

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 salea analysis reports.



Procedure

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

2. Year:

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

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

Press **F4** to return to the Sales Analysis Defintion 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:

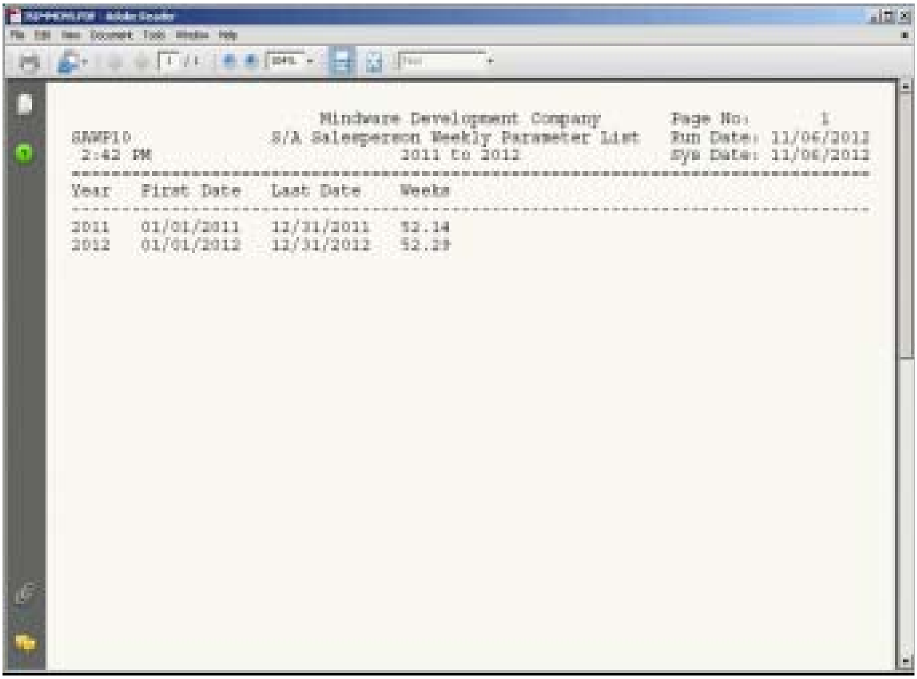
Type **Y** if the data is correct. Return to Step 2.

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

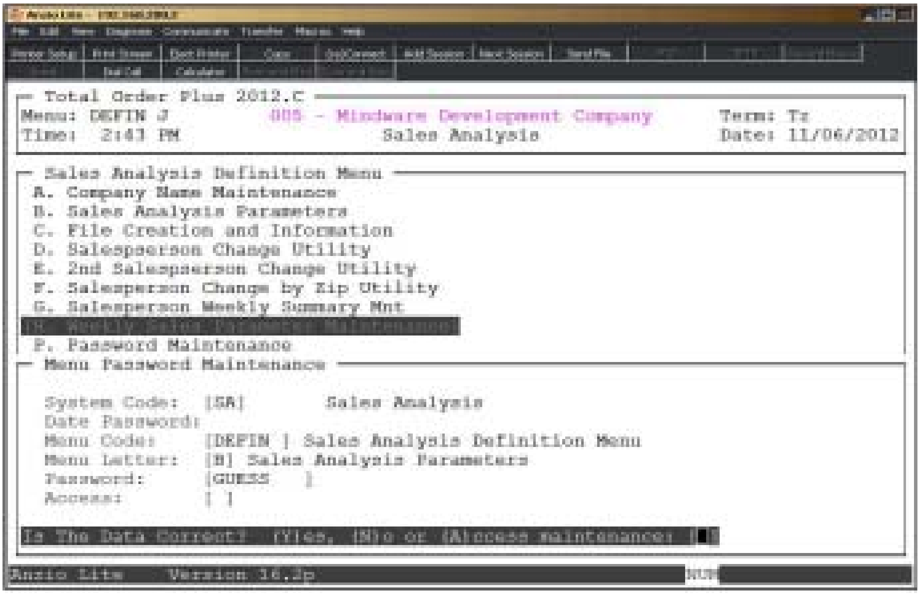


```
                         Mindware Development Company       Page No:        1
SAWP10                S/A Salesperson Weekly Parameter List  Run Date: 11/06/2012
 2:42 PM                            2011 to 2012             Sys Date: 11/06/2012
================================================================================
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:

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.

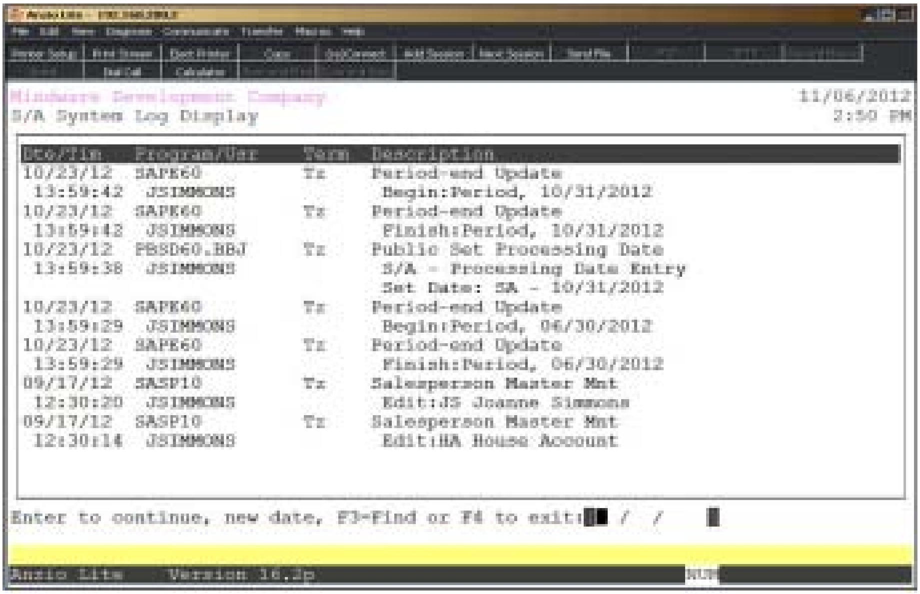
6. Is The Data Correct? (Y)es or (N)o:

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.



3

OPERATING THE SALES ANALYSIS SYSTEM

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

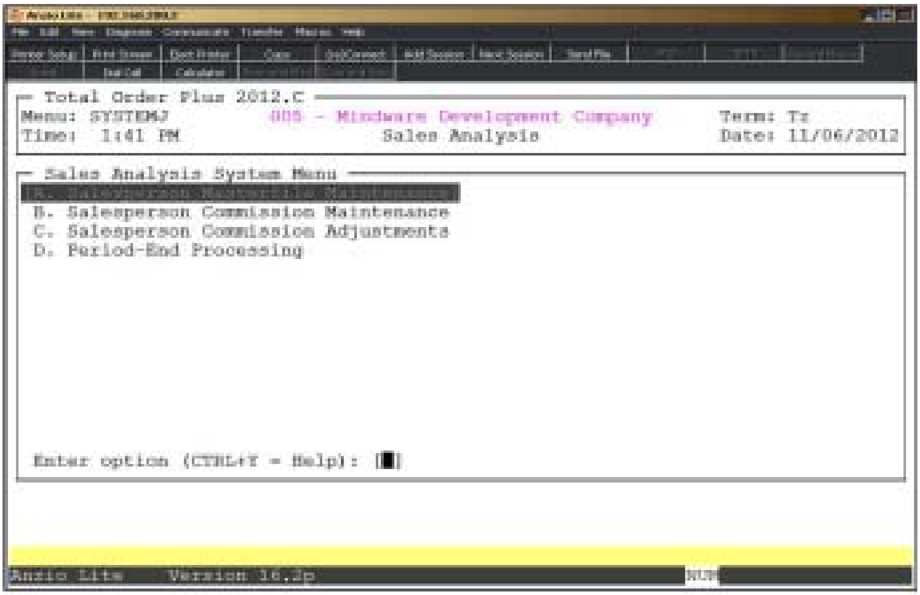
Sales Analysis System Menu

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.

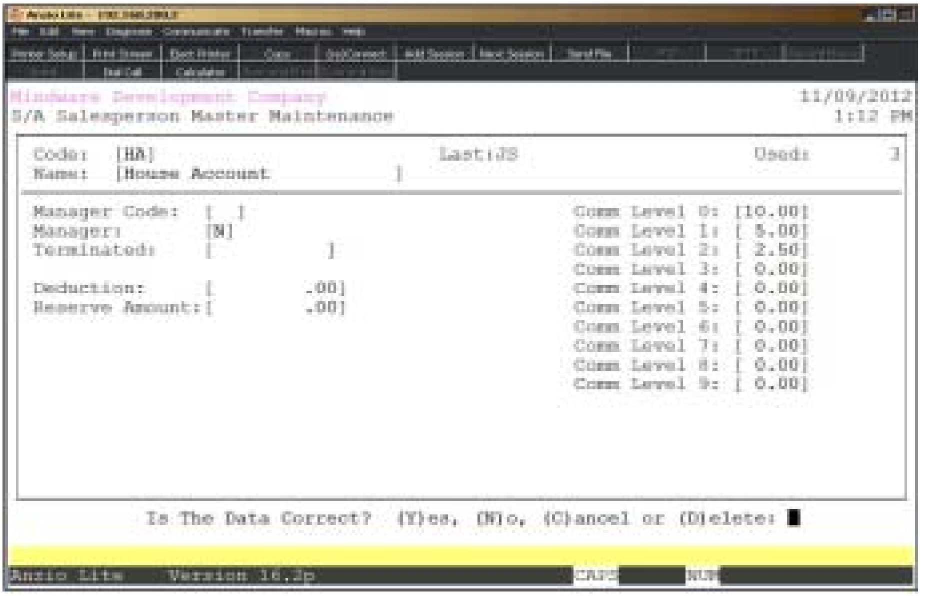
Period-End Processing removes period-to-date sales figures and paid invoices by salesperson, depending on the flag in the 'Sales Analysis Parameters' on the Sales Analysis Definition Menu.



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.

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.

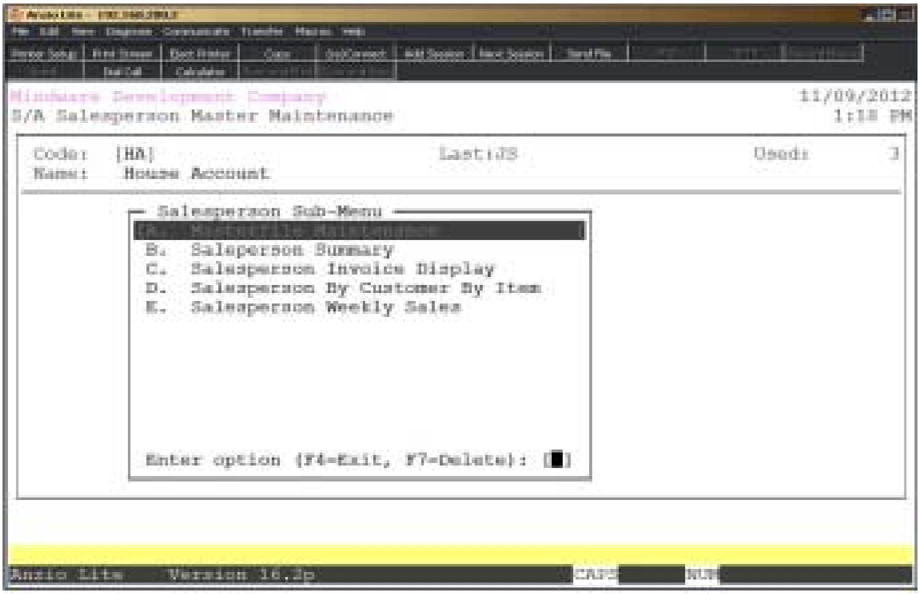
> *Note: Selecting (C)ancel will exit the program without saving any parameter changes that have been made. Save changes? (Y)es or (N)o:*
>
> *Type **Y** to save the parameter settings and return to the Salesperson Sub-Menu.*
>
> *Type **N** to **not** save changes and return to the Salesperson Sub-Menu.*

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

Salesperson Sub-Menu

Overview

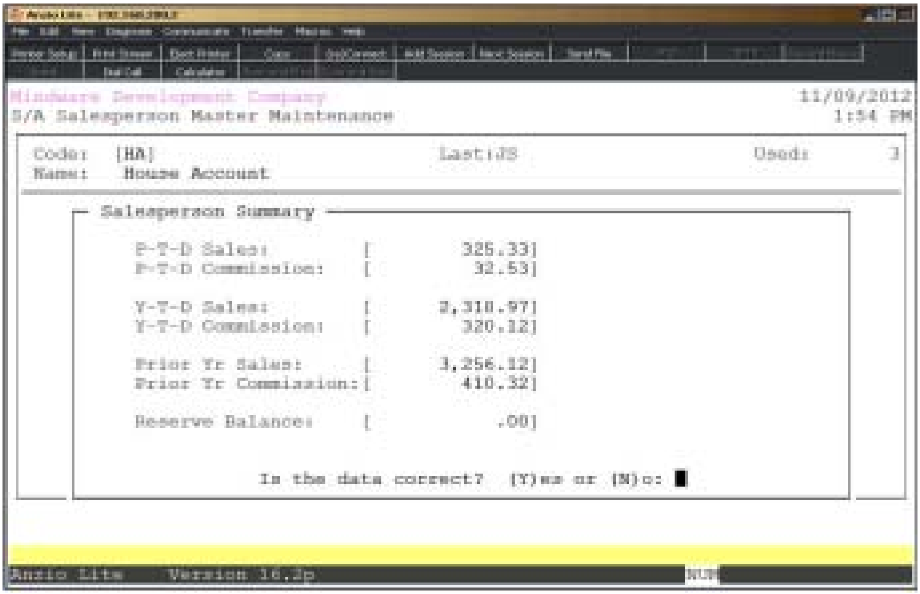
The Sales Analysis Salesperson Sub-Menu allows you to view or edit the percent of commission for multiple levels (0-9). You can view the period-to-date, year-to-date and prior year sales and amount of commission, all open invoices showing amount of commission per invoice and sales and units sold by customer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

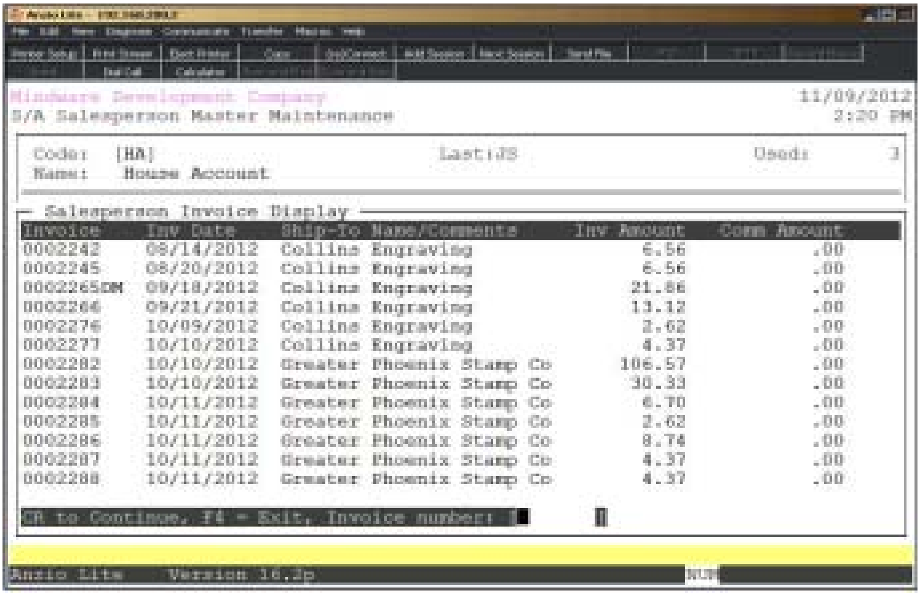
Type the reserve account amount for this salesperson and **Enter**. Return to Step 2.

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.

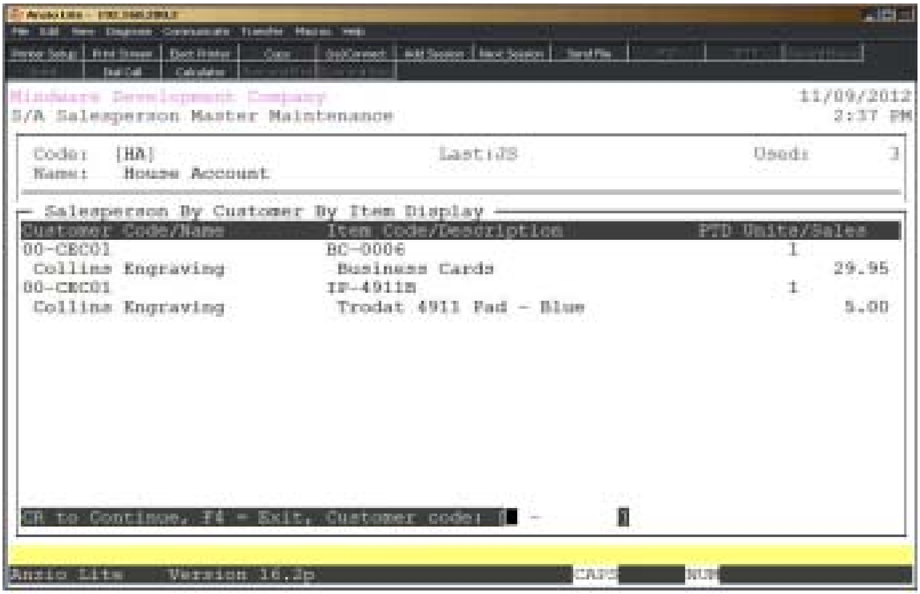
Press **F4** to return to the Salesperson Sub-Menu.

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.

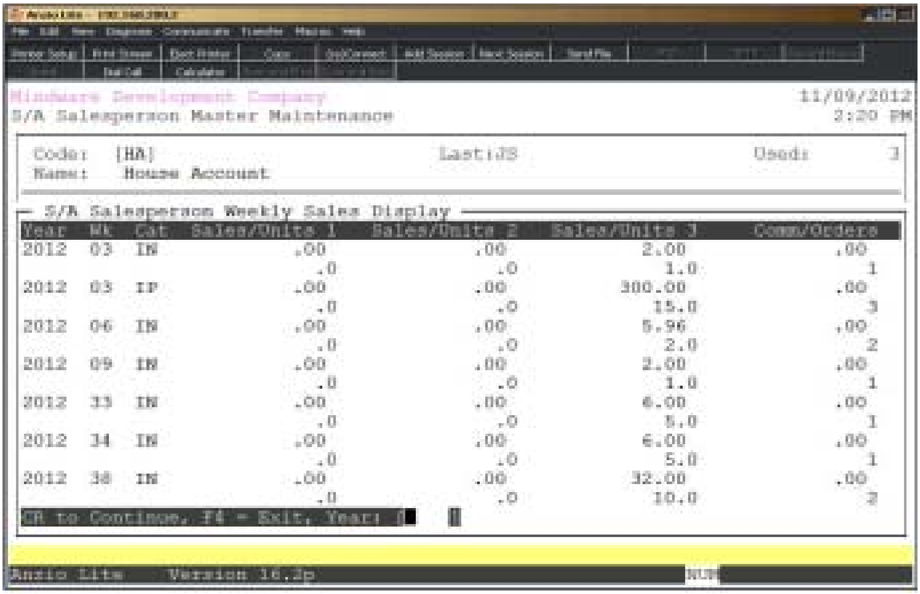
Press **F4** to return to the Salesperson Sub-Menu.

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

Salesperson Weekly Sales

Overview

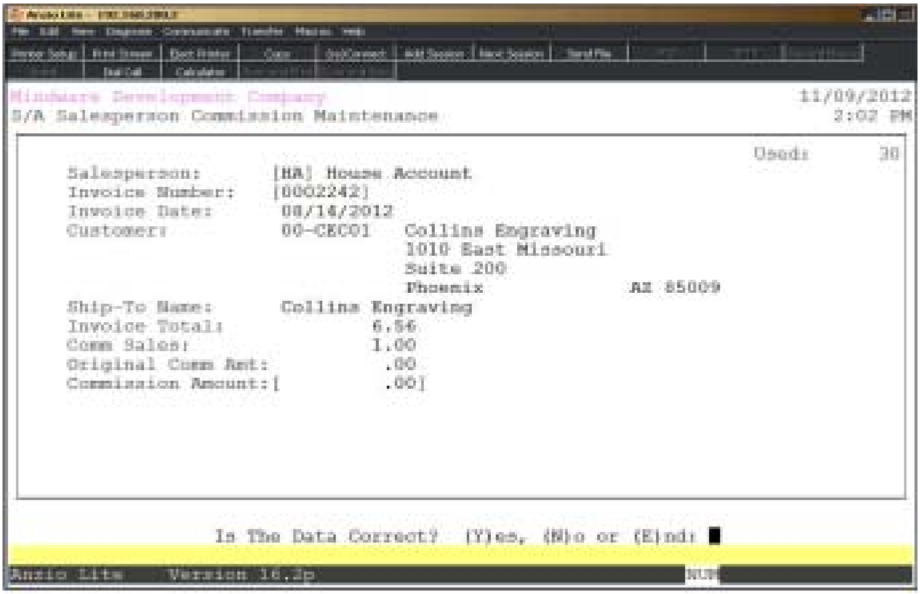
The Salesperson Weekly Sales displays the year, week of the year, product category, sales and units, commission amount and number of orders for the selected salesperson.



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.



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:

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.

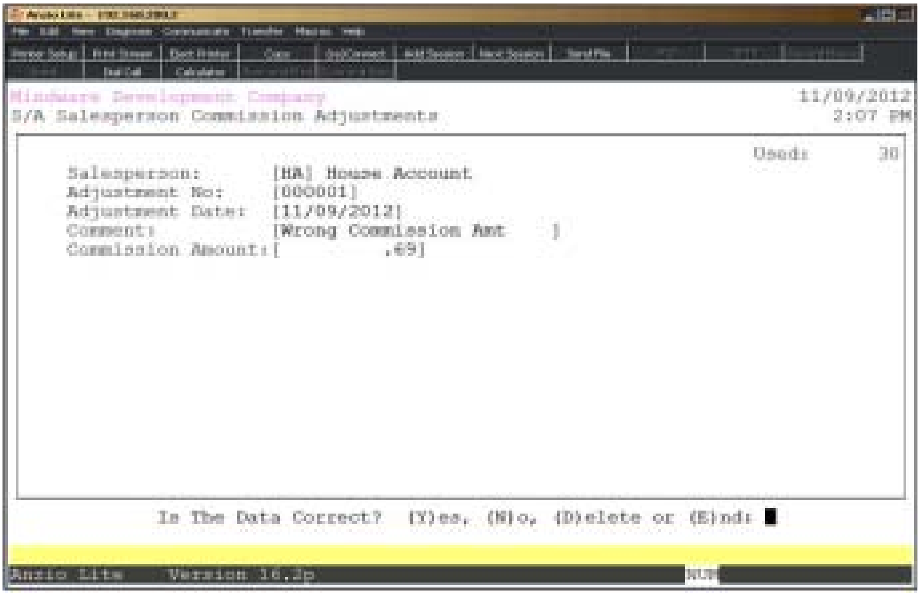
5. Commission Amount:

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.

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.

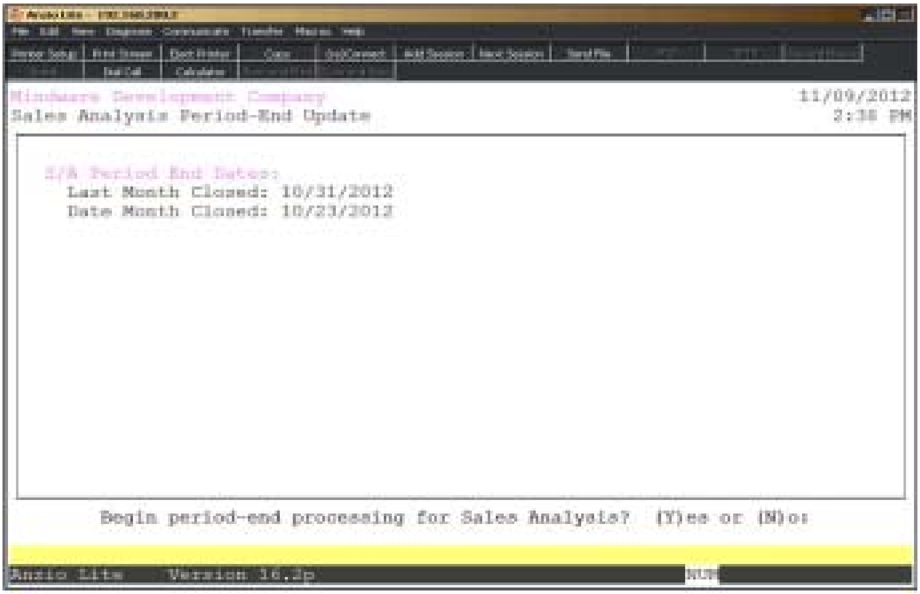
Type **E** to end the program and return to the Sales Analysis System Menu.

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 (No):

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

*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
- Custmer 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.

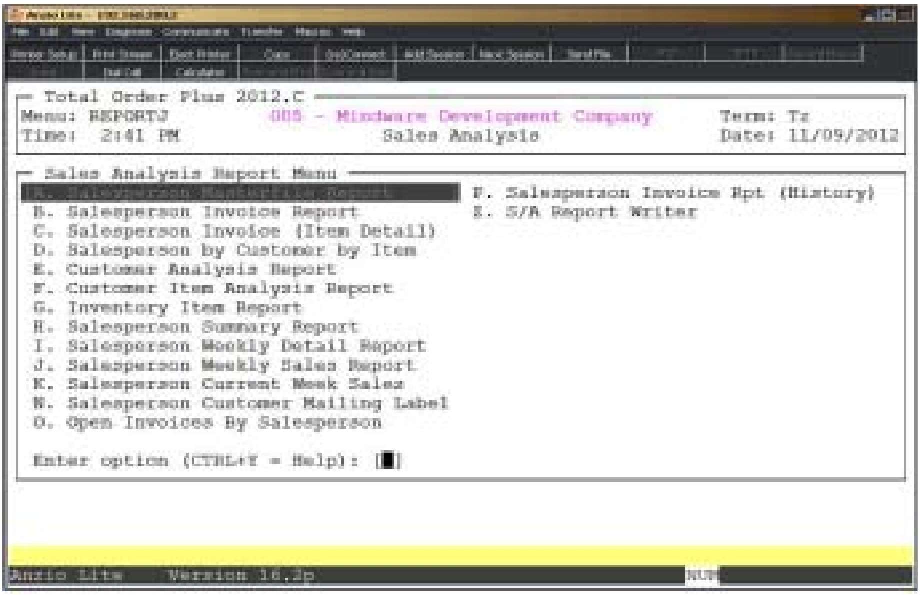
Sales data is transferred to the Sales Analysis system from the Order Entry system during the Daily Sales Journal & Update. After you print invoices, you must print the Sales Journal, the Salesperson Summary, Sales Tax Report and the Backorder Report. You must update the invoices before you can update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

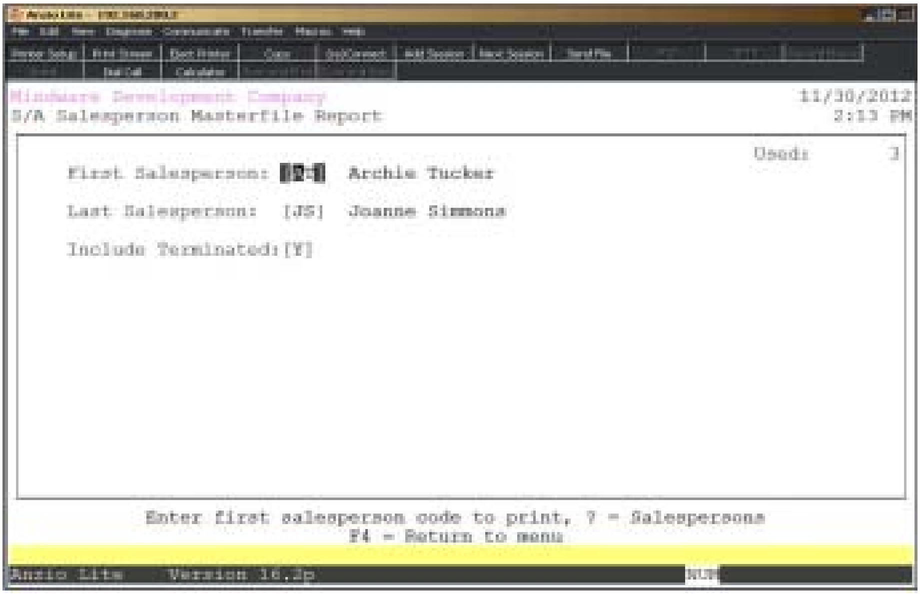
> *Note: The available and used in the upper right hand corner of each report screen reflects the number of records currently available in the analysis file and how many records have already been used.*



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.

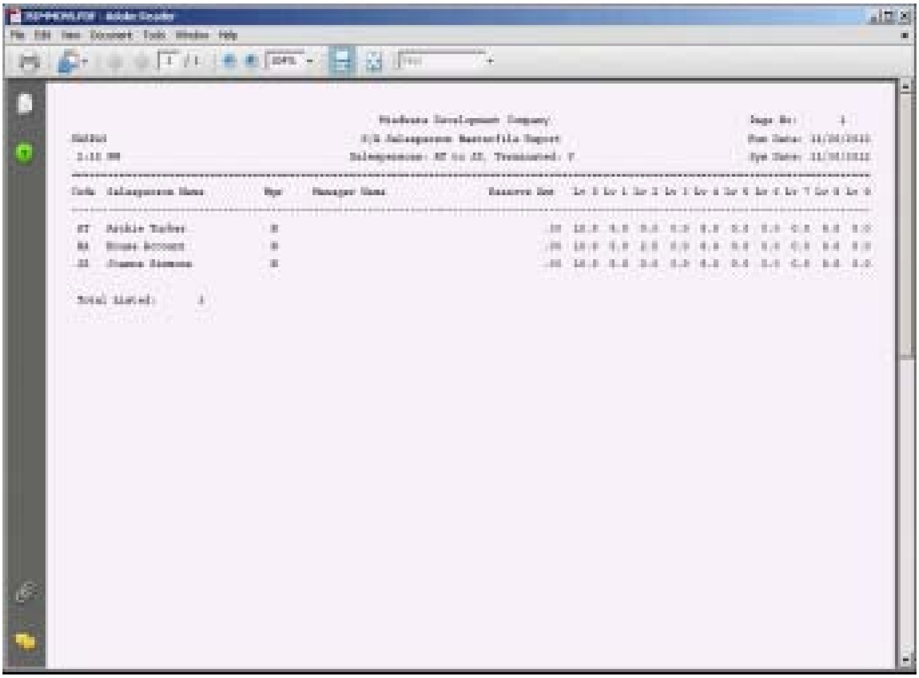
Press **F2** to return to the previous input field.

4. Include Terminated:

Type **Y+** the **Enter** key if you want to include terminated salespersons.

5. Select the appropriate printer for this report.

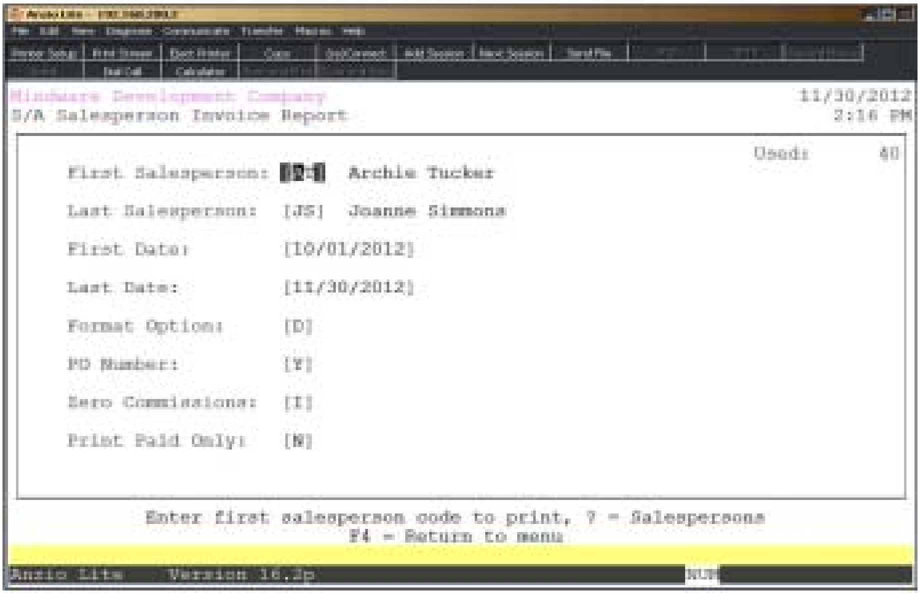
Salesperson Masterfile Report Sample



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?

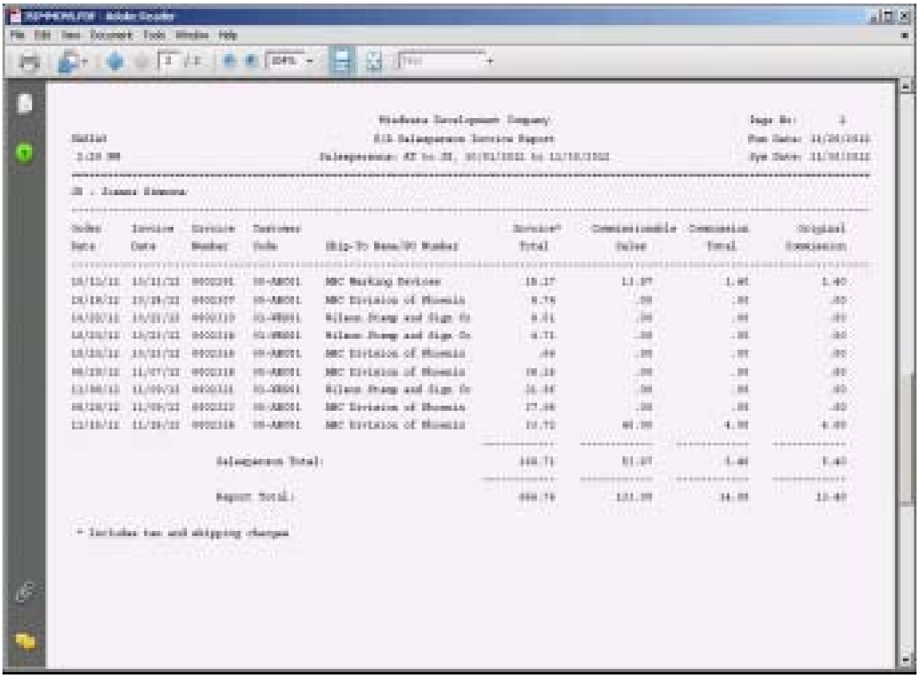
Type **Y+** the **Enter** key to list only paid invoices on this report.

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

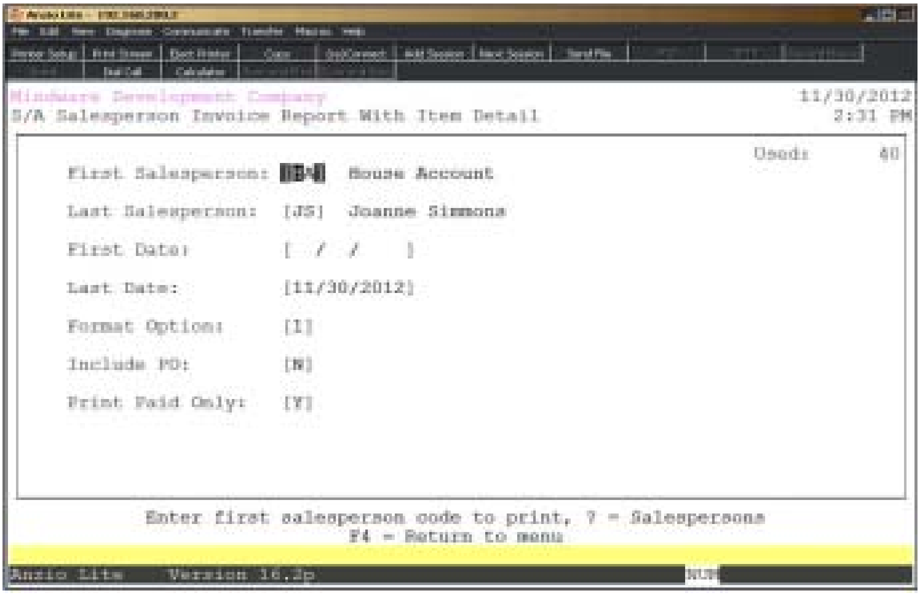


Salesperson Invoice Report (Item Detail)

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.



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.

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 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.

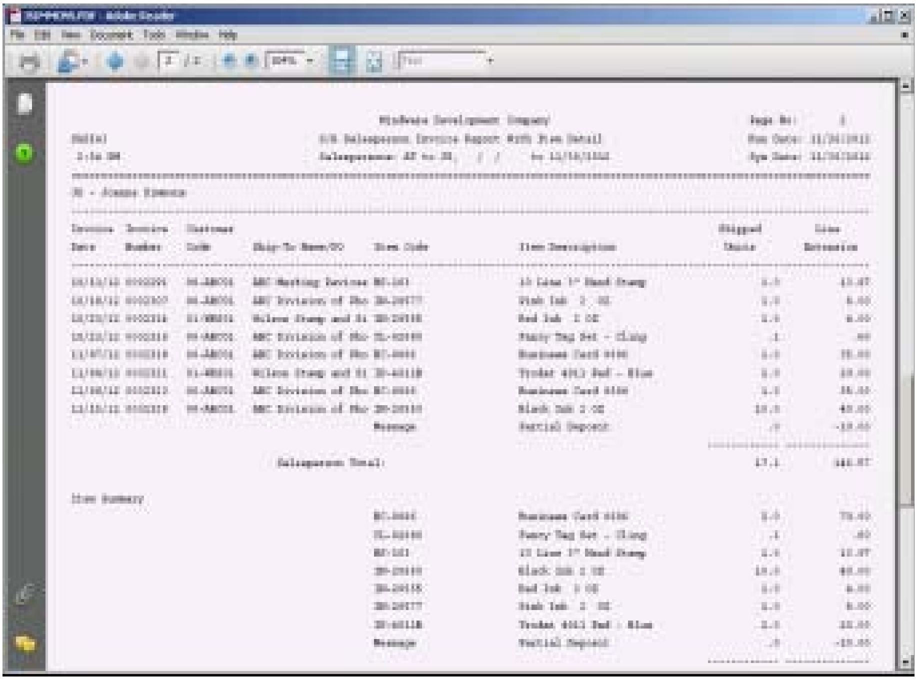
8. Print Paid Only:

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.

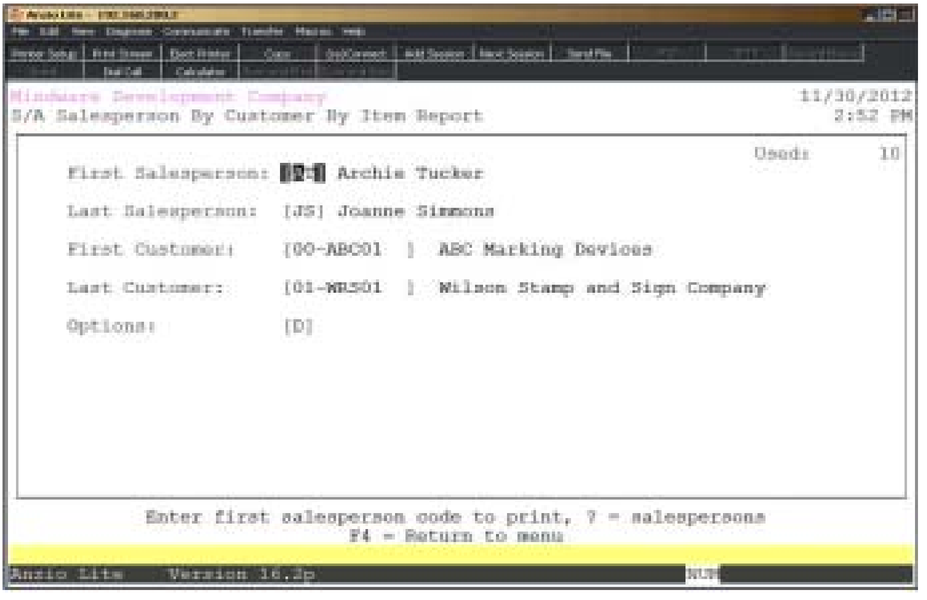
Salesperson Invoice Report (Item Detail) Sample



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:

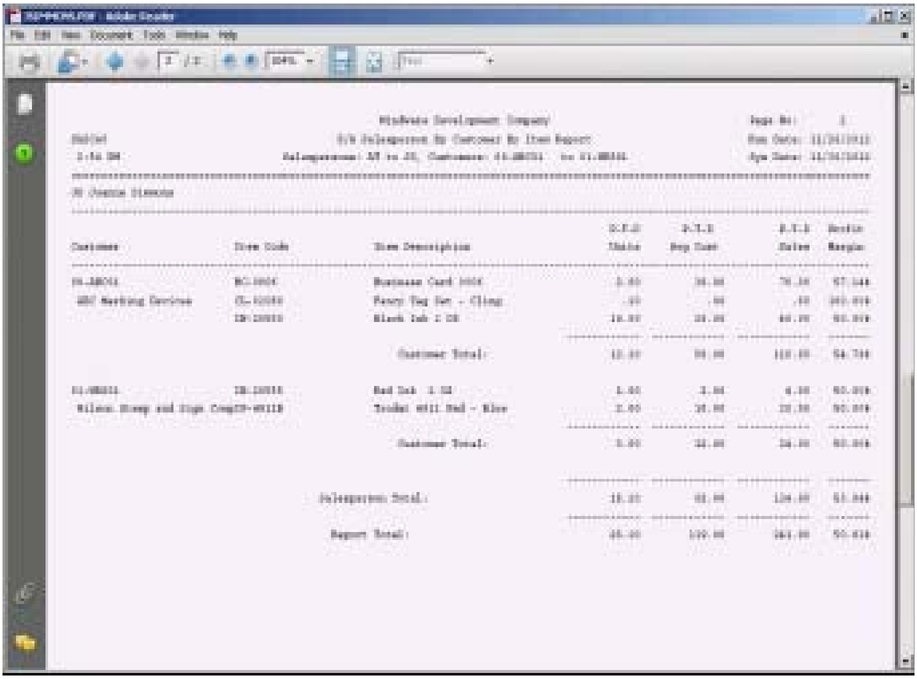
Type the last customer to print and **Enter** or type **?** to display the Customer Code Selection window.

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

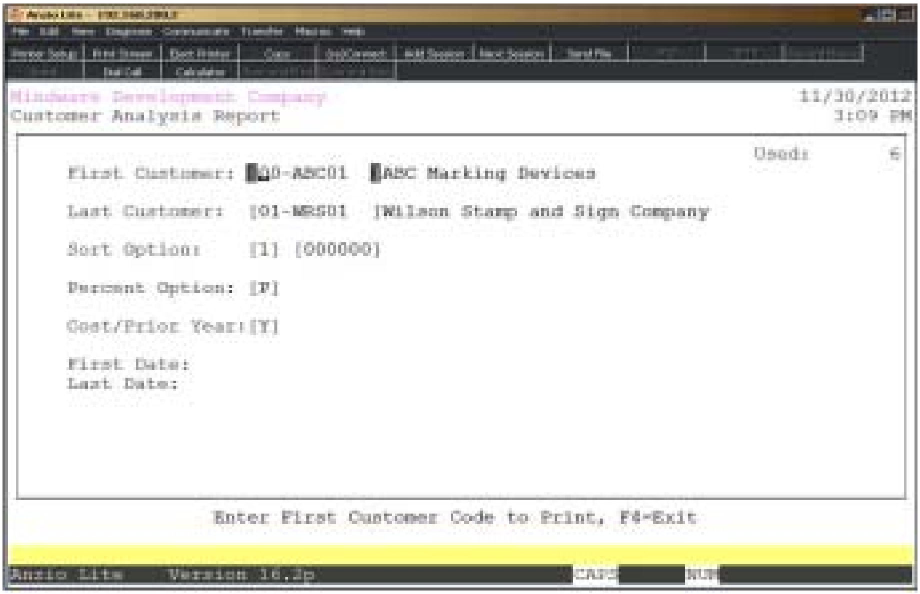


Customer Analysis Report

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.



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:

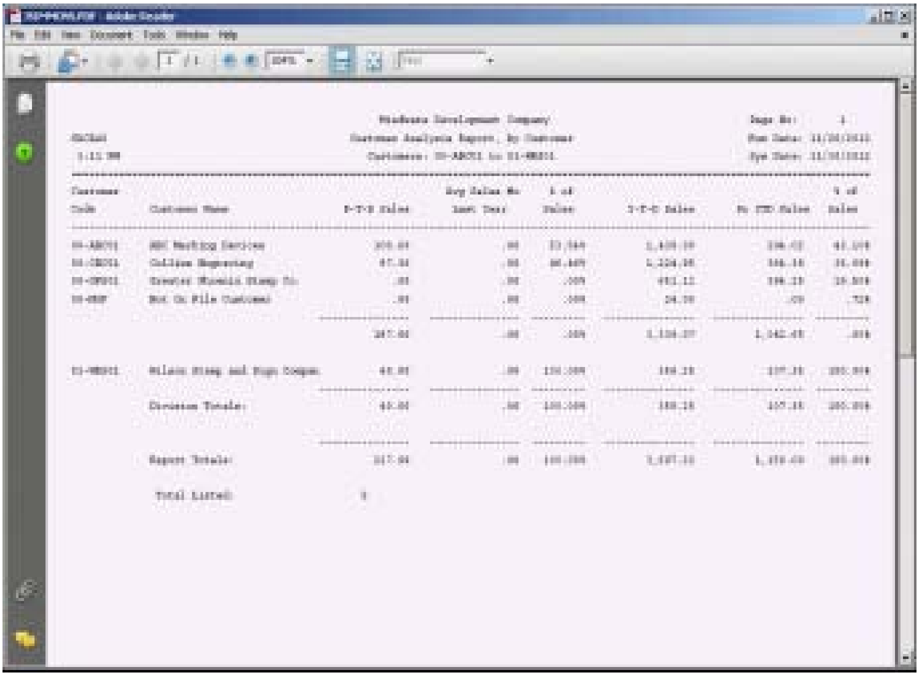
Type the first date in MMDD format and **Enter**. No dashes or slashes are required. The system will automatically insert the current century and year.

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

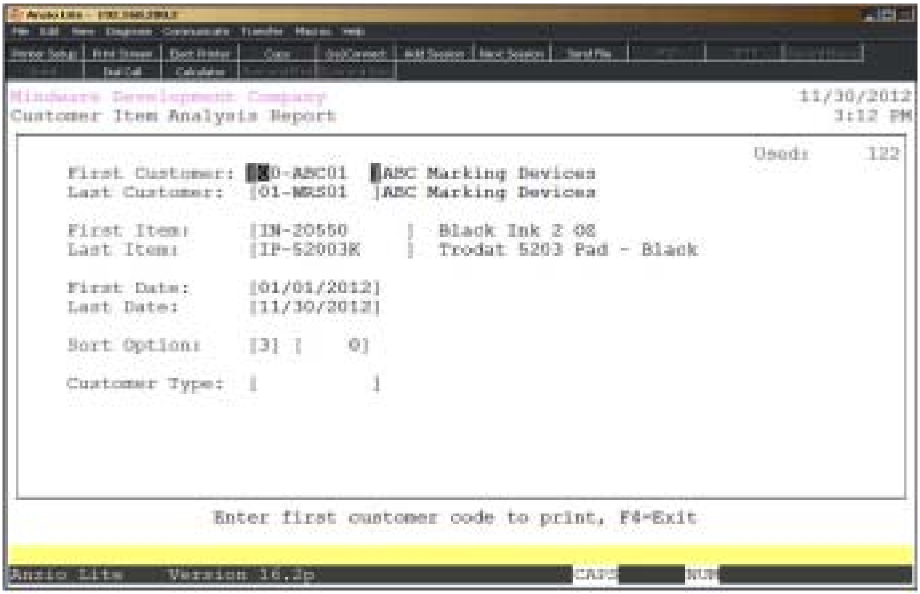


Customer Item Analysis Report

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.

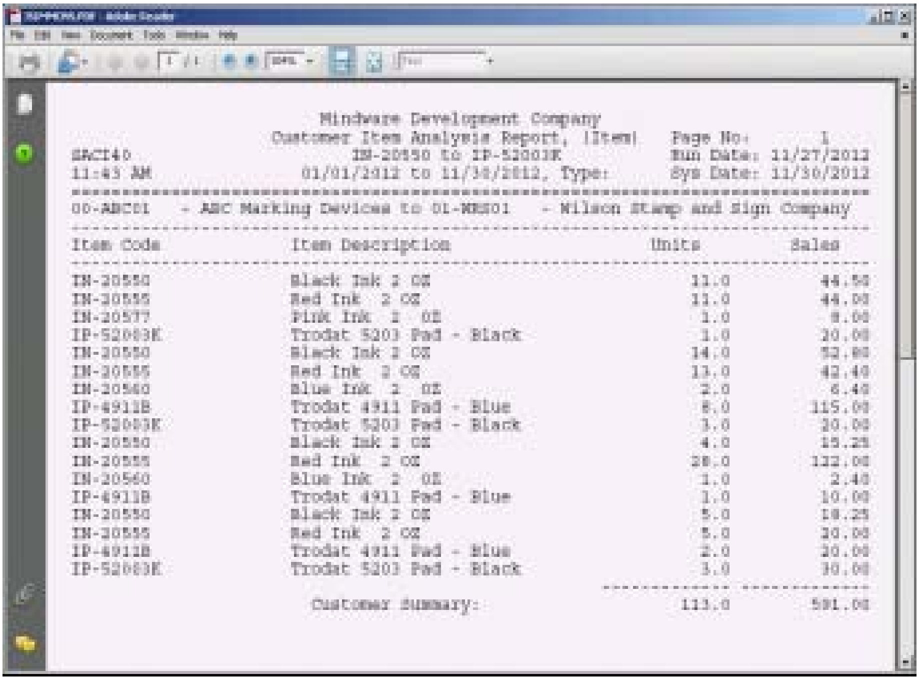
Note: The system will prompt you for the number of items to print per customer or enter zero to list all.

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
SACI40 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

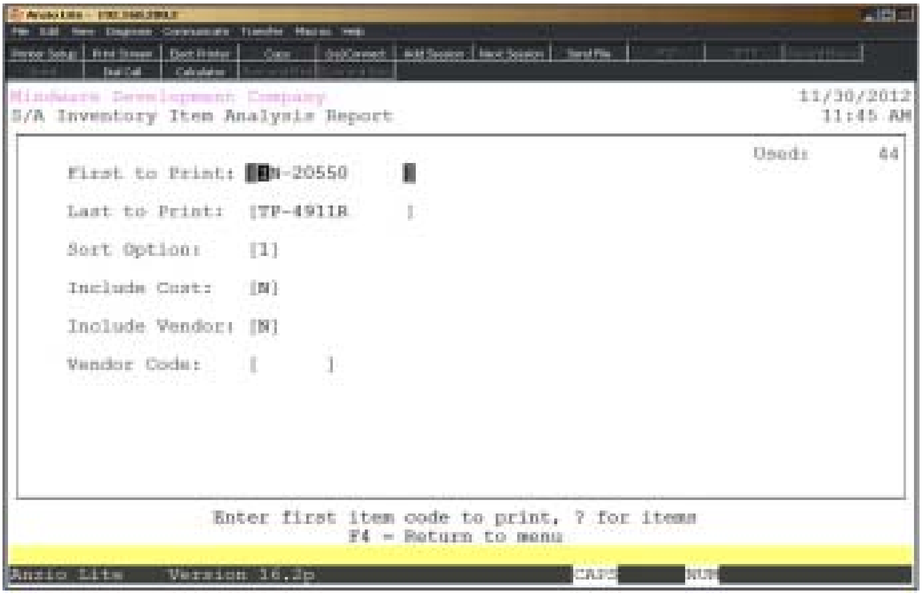
00-ABC01 - ABC Marking Devices to 01-WSS01 - Wilson Stamp and Sign Company

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	15.25
IN-20555	Red Ink 2 OZ	28.0	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.



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:

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.

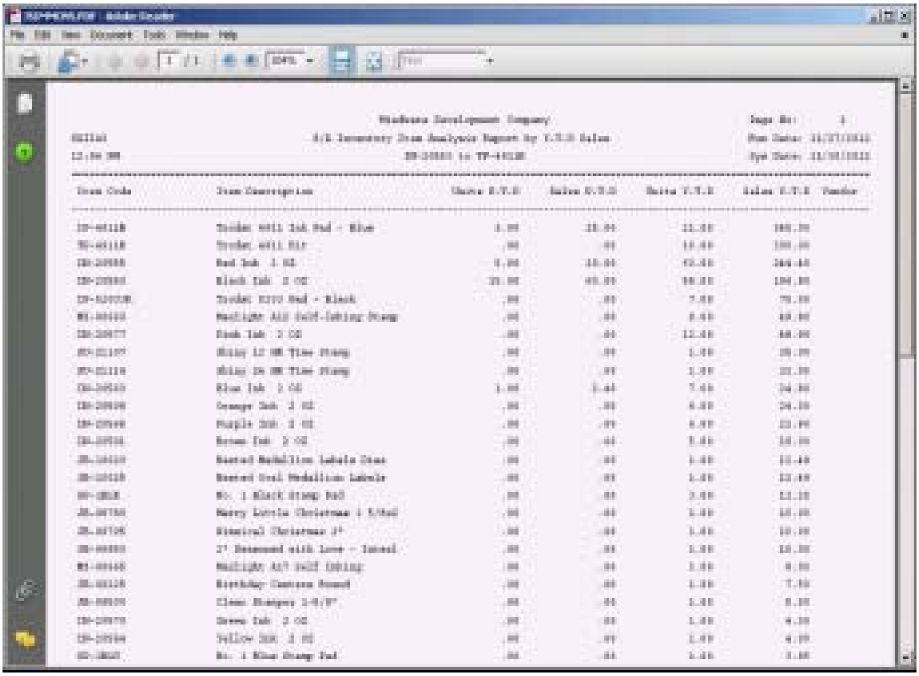
Type **N+** the **Enter** key to exclude the royalty vendor. Go to Step 8.

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.

Inventory Item Report Sample

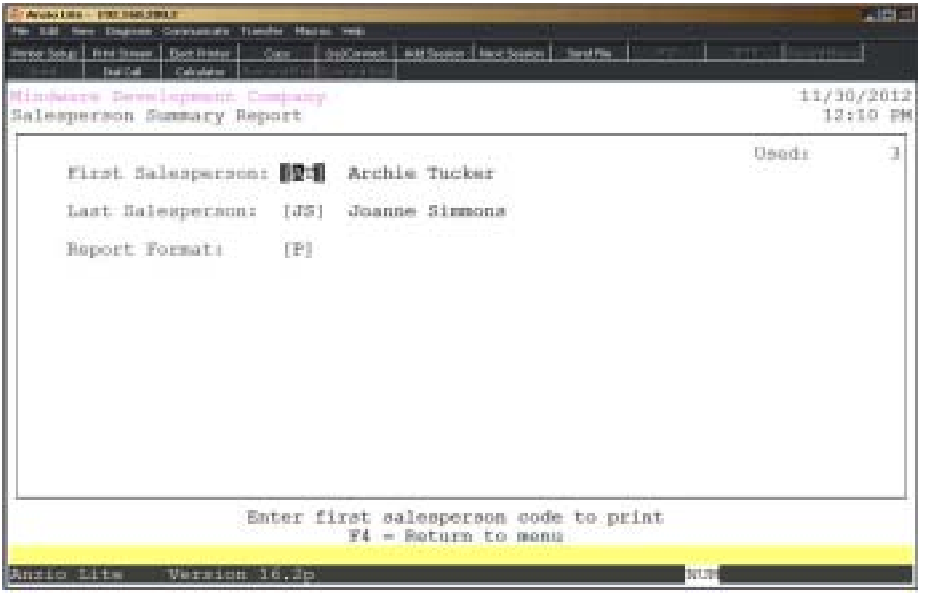


Salesperson Summary Report

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.

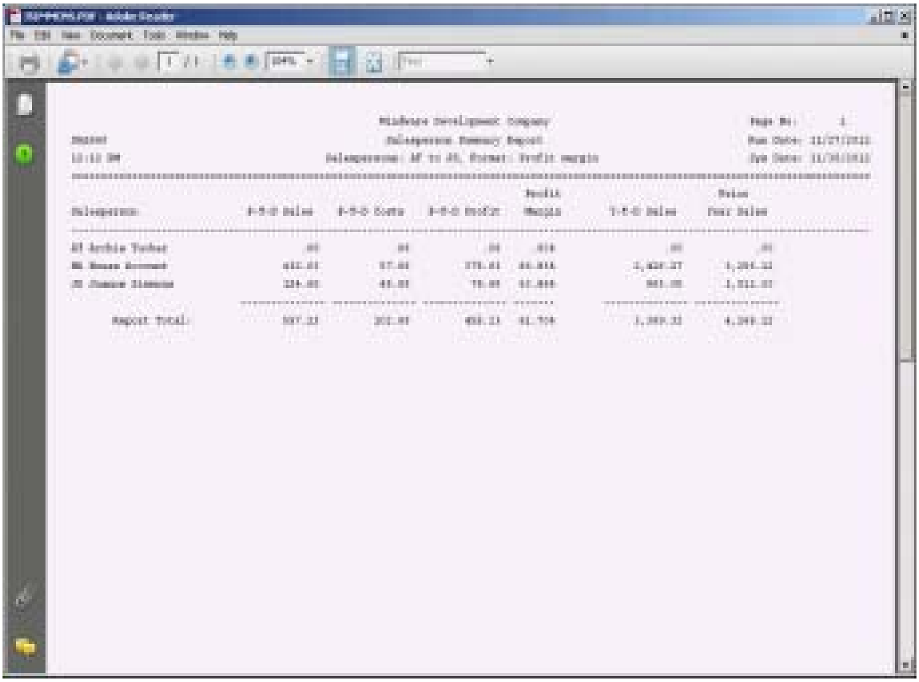
5. Report Format:

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.

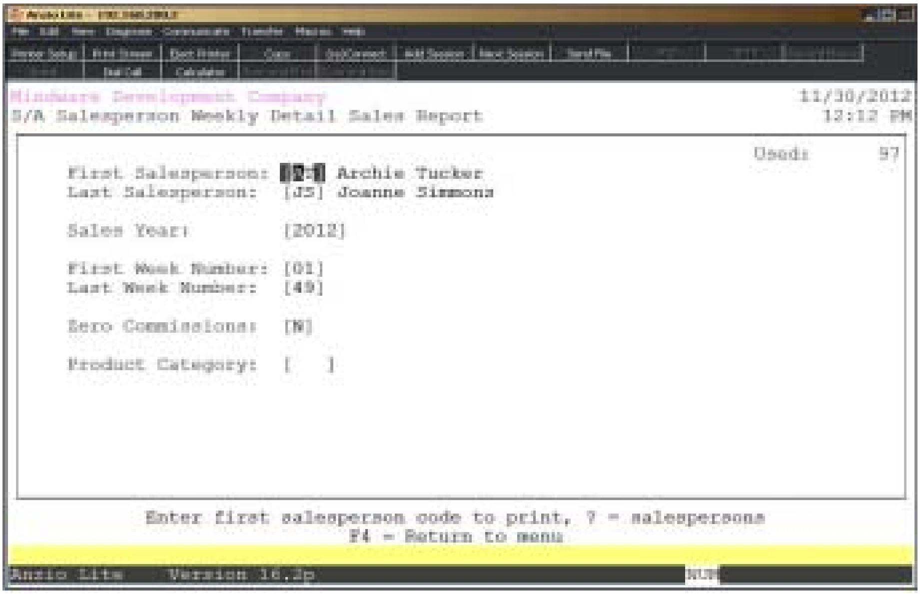
Salesperson Summary Report Sample



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.



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**.

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.

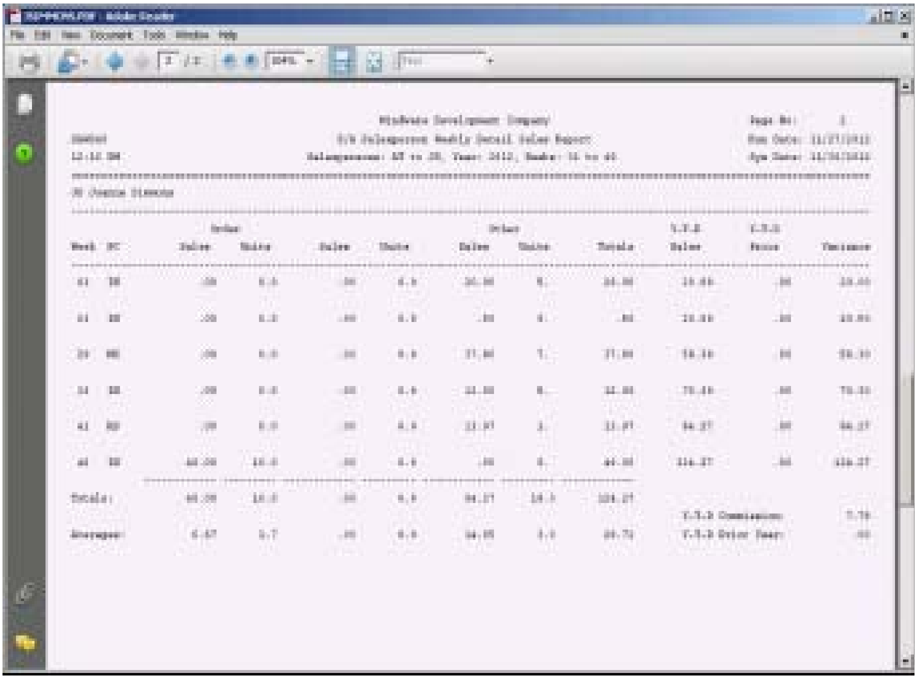
Type **N+** the **Enter** key not to list zero commission amounts.

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.

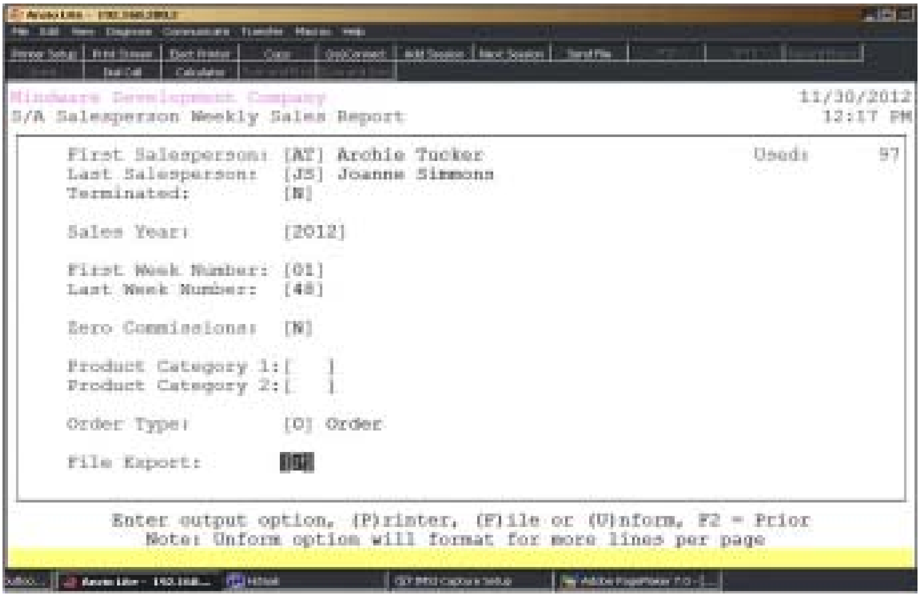
Salesperson Weekly Detail Report Sample



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:

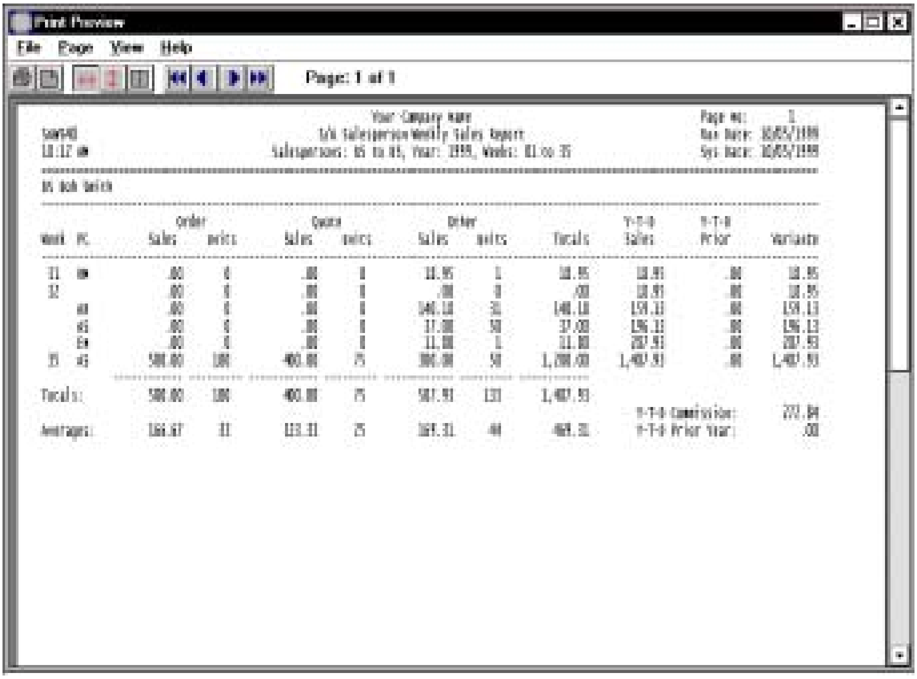
Type **P+** the **Enter** key to print this report to a printer.

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.

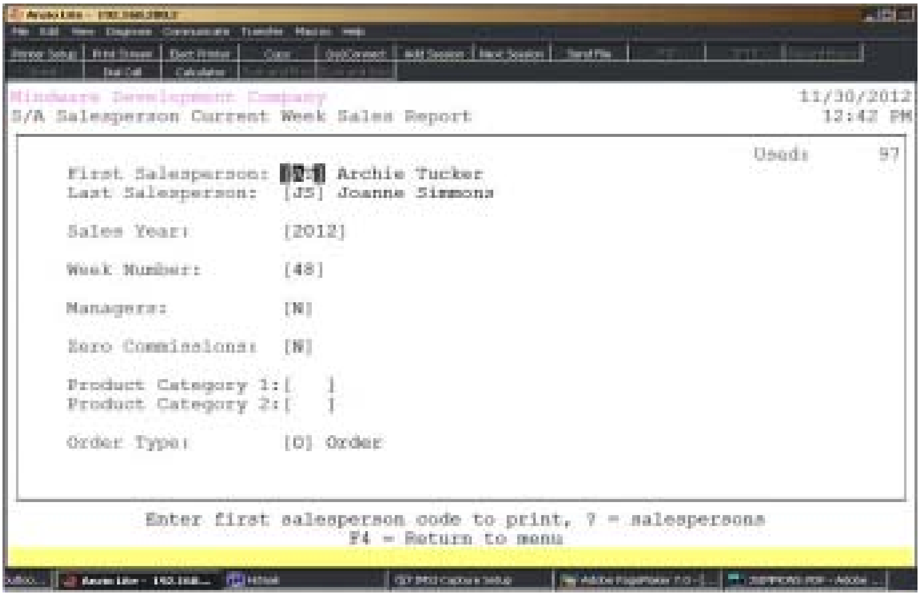
Salesperson Weekly Sales Report Sample



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.



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:

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.

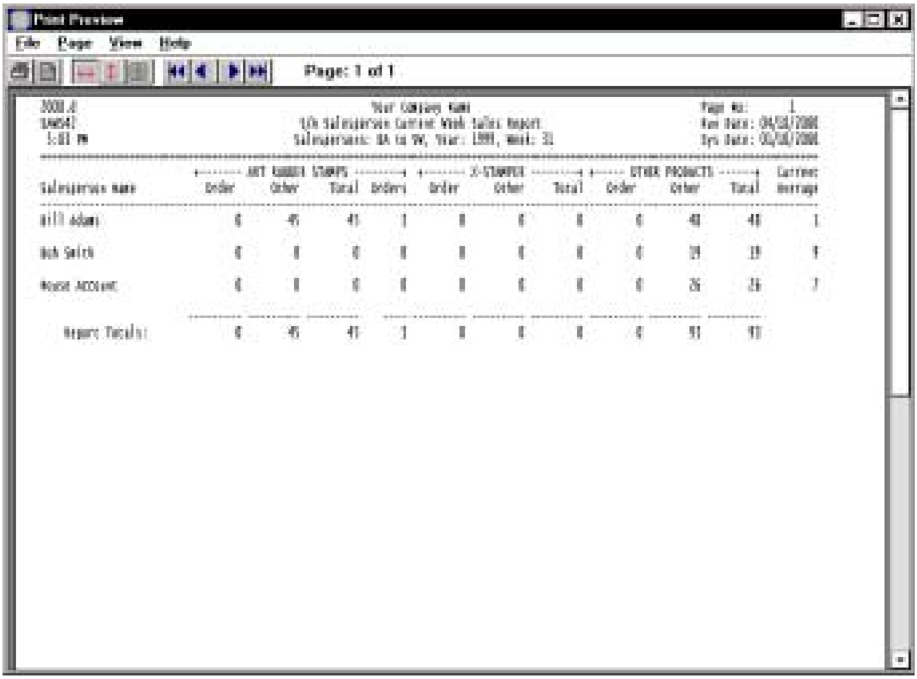
10. Order Type:

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

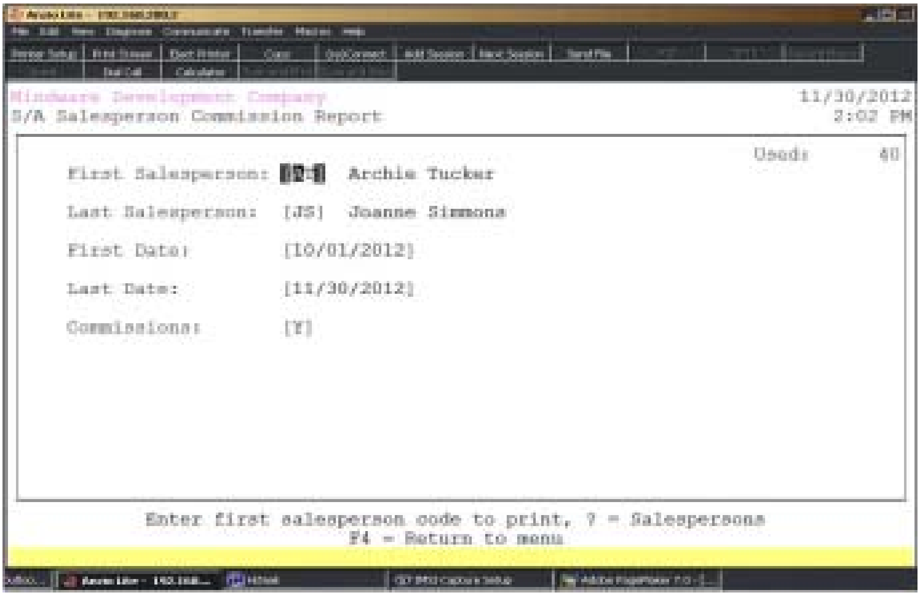


Salesperson Commission Report

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.

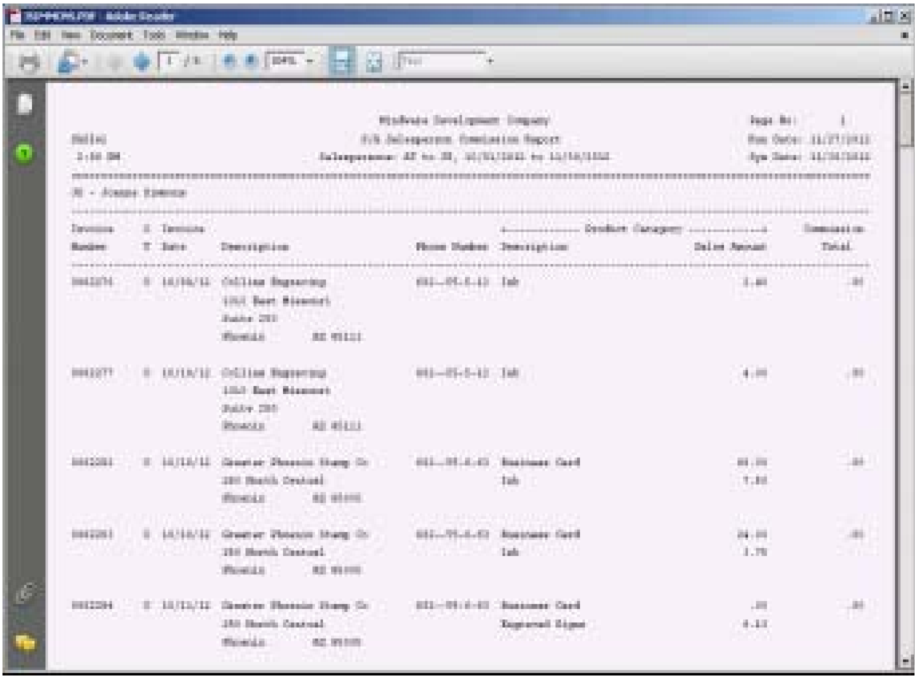
6. Commissions:

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.

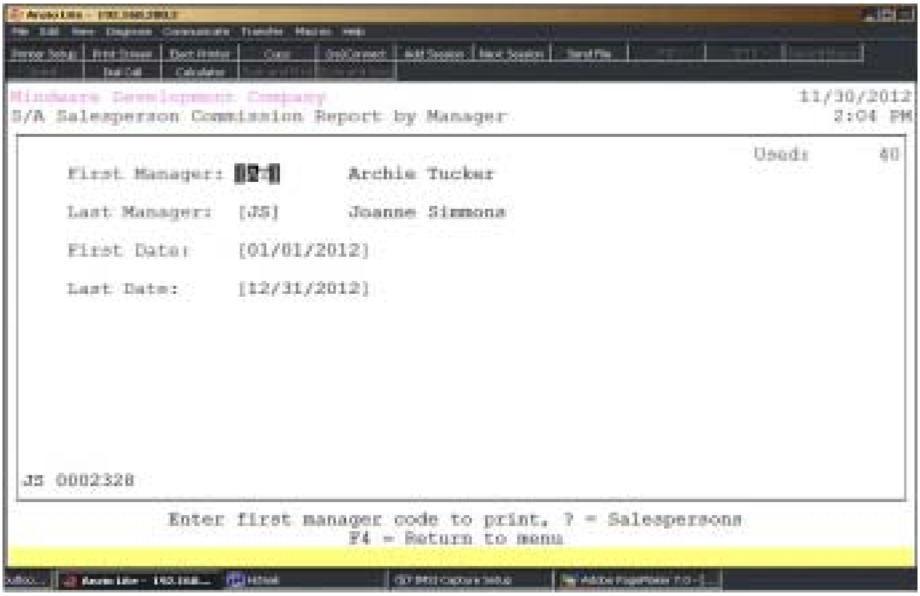
Salesperson Commission Report Sample



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 cagegory 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.

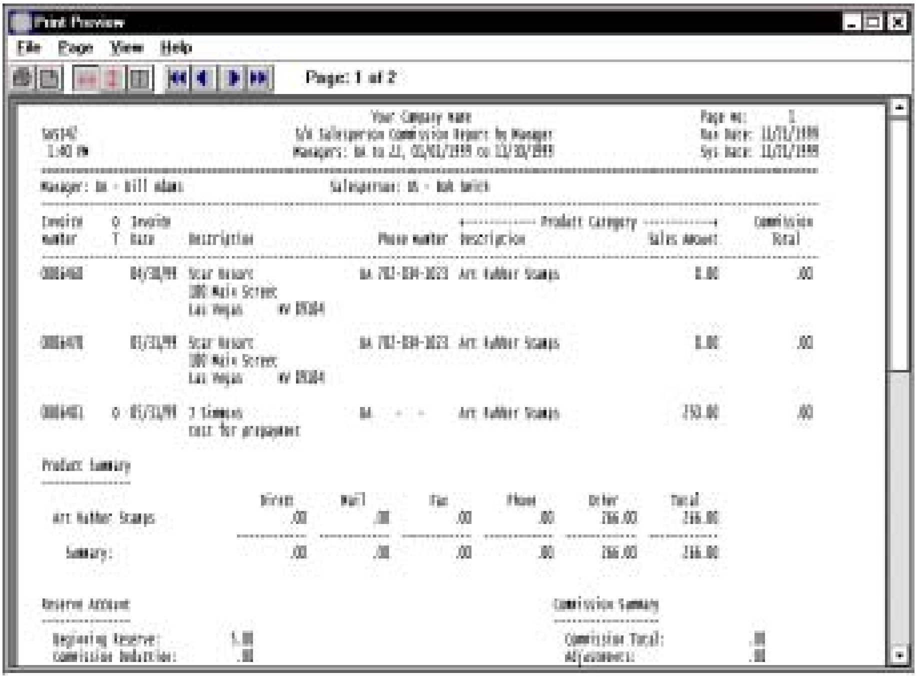
4. First Date:

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.

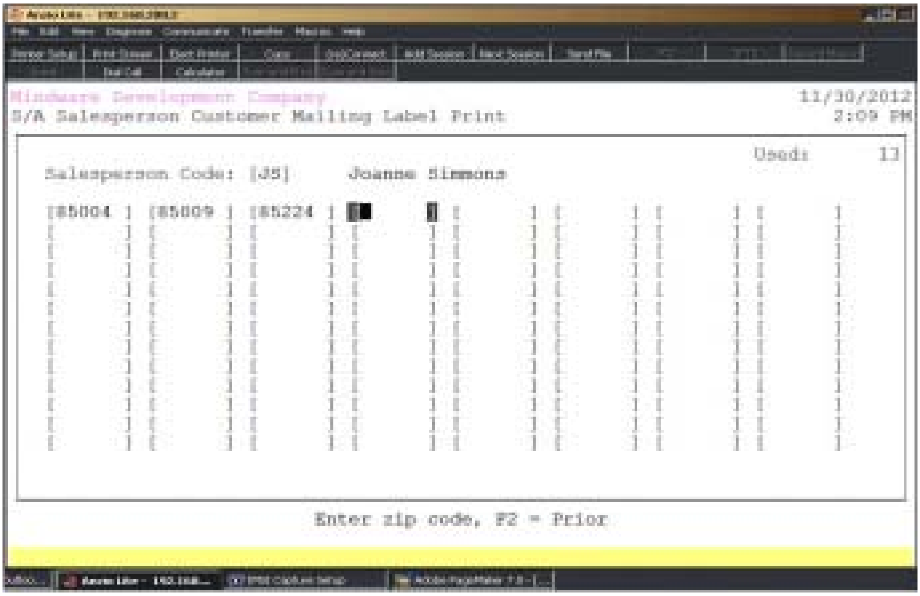
Salesperson Commission By Manager Report Sample



Salesperson Customer Mailing Labels

Overview

The Salesperson Customer Mailing Labels allows you to print one inch labels for a salesperson for territories within specified zip codes. The labels print the customer name and address and the date last sold month and year.



Procedure

1. Choose Salesperson Customer Mailing Labels on the Sales Analysis Report Menu.

2. Salesperson Code:

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

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

3. Zip Code:

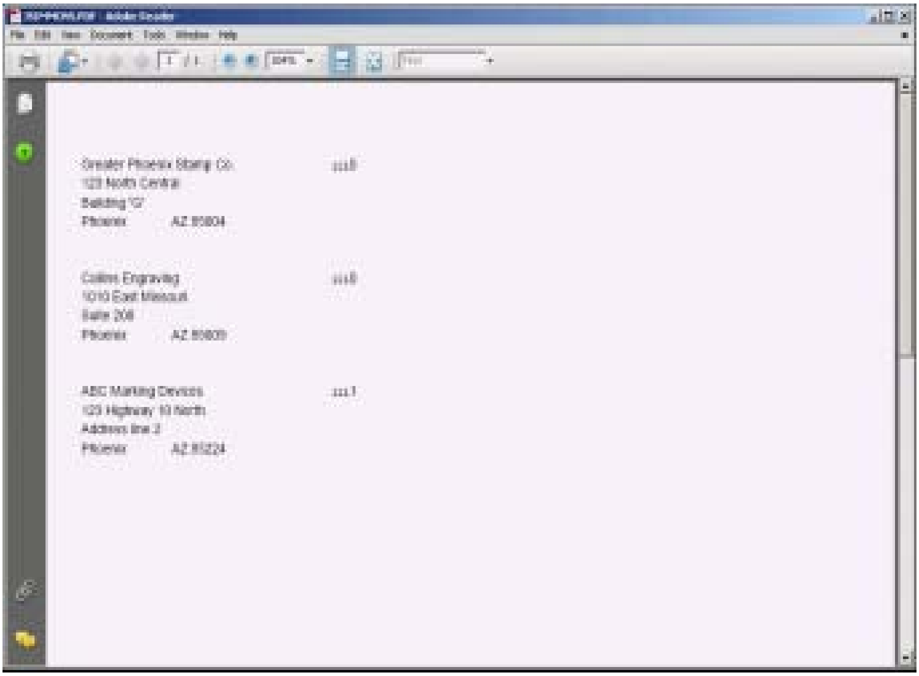
Type the zip code numbers that you want to print labels for and **Enter** after each selection.

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

Note: There are one-hundred-four (104) zip code selections.

4. Select the appropriate printer for this report.

Salesperson Customer Mailing Labels Sample

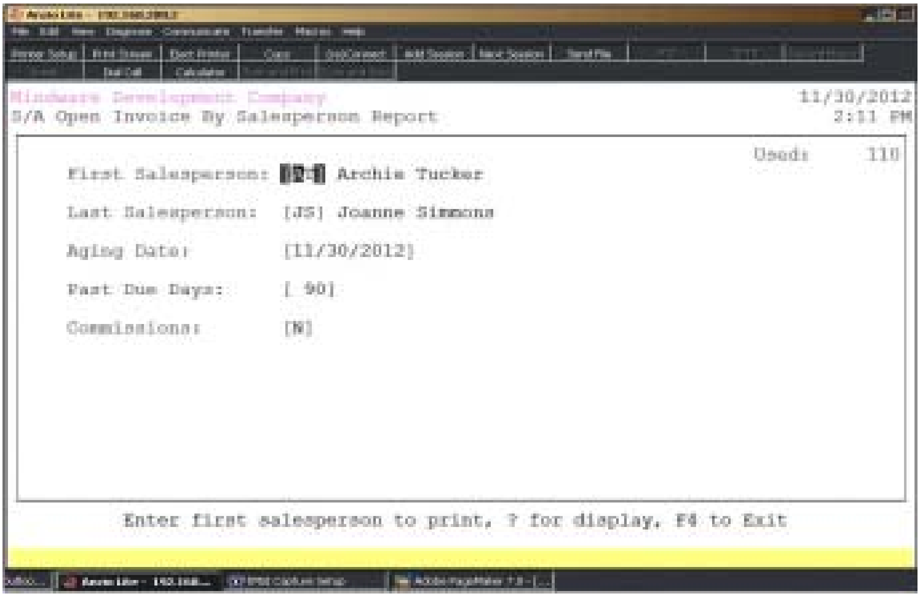


Open Invoices By Salesperson

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.

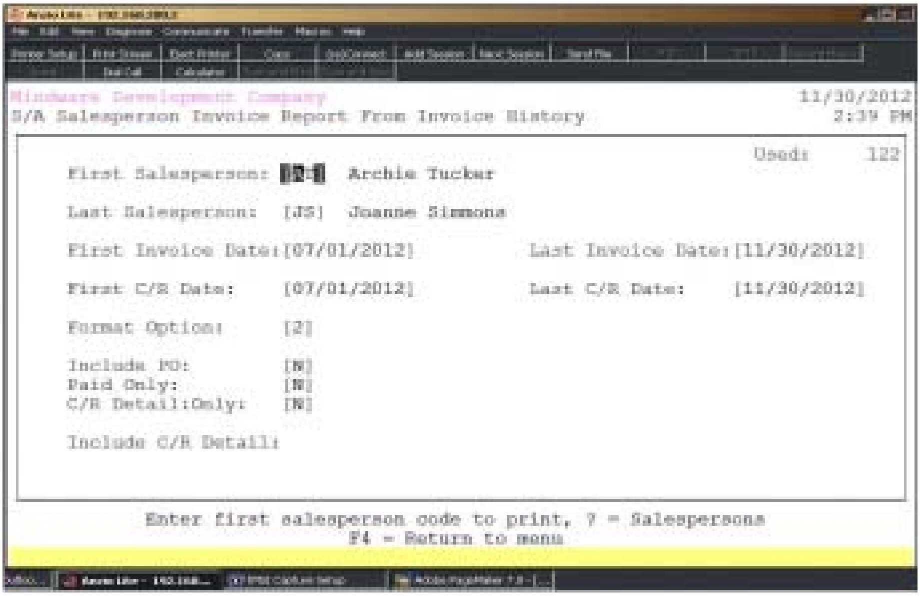
7. Select the appropriate printer for this report.

Open Invoices By Salesperson Report Sample

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.



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.

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 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.

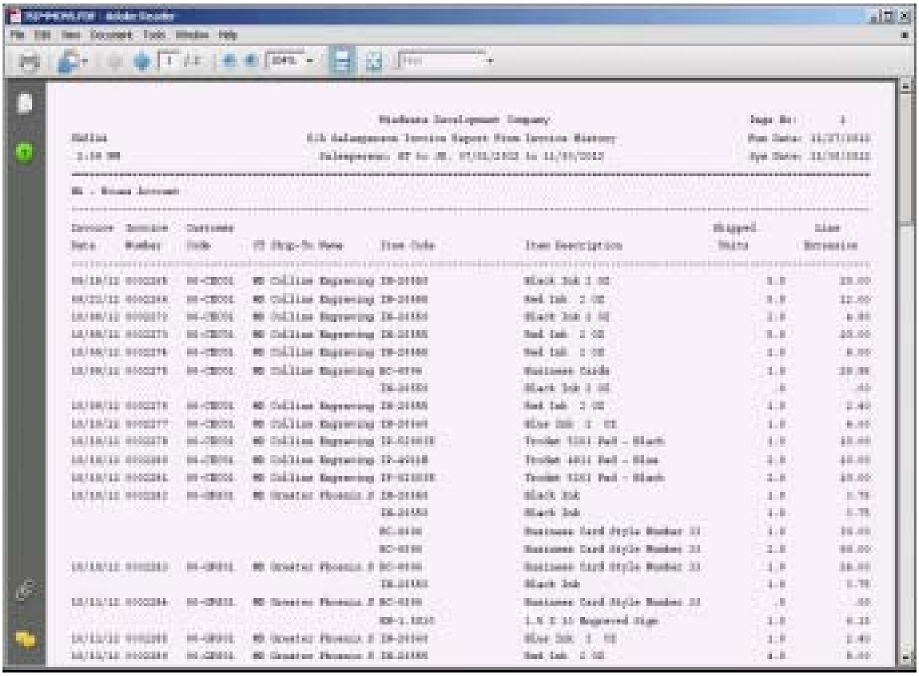
9. Include C/R Detail:

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



5

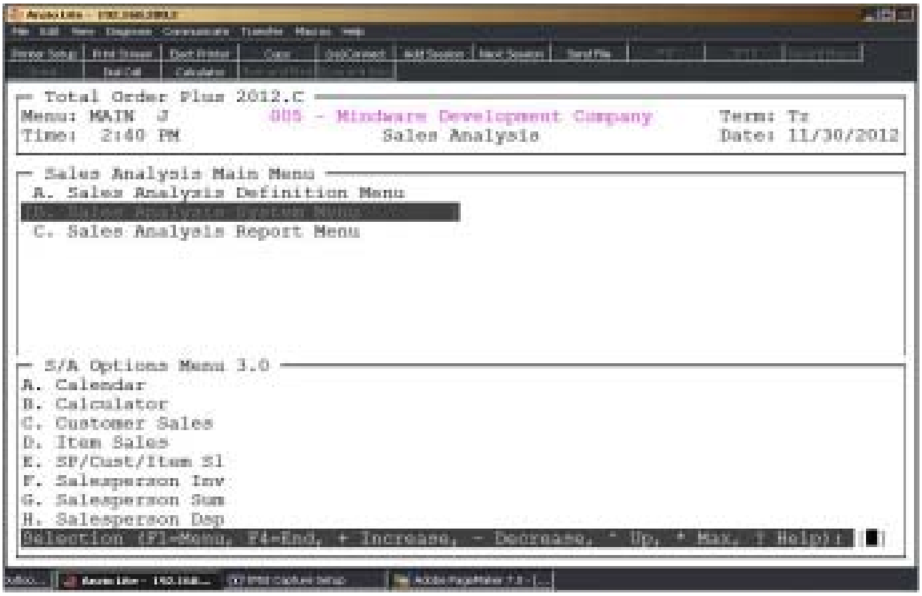
SALES ANALYSIS OPTIONS MENU

- 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.