

How to use Sales Analysis Designer

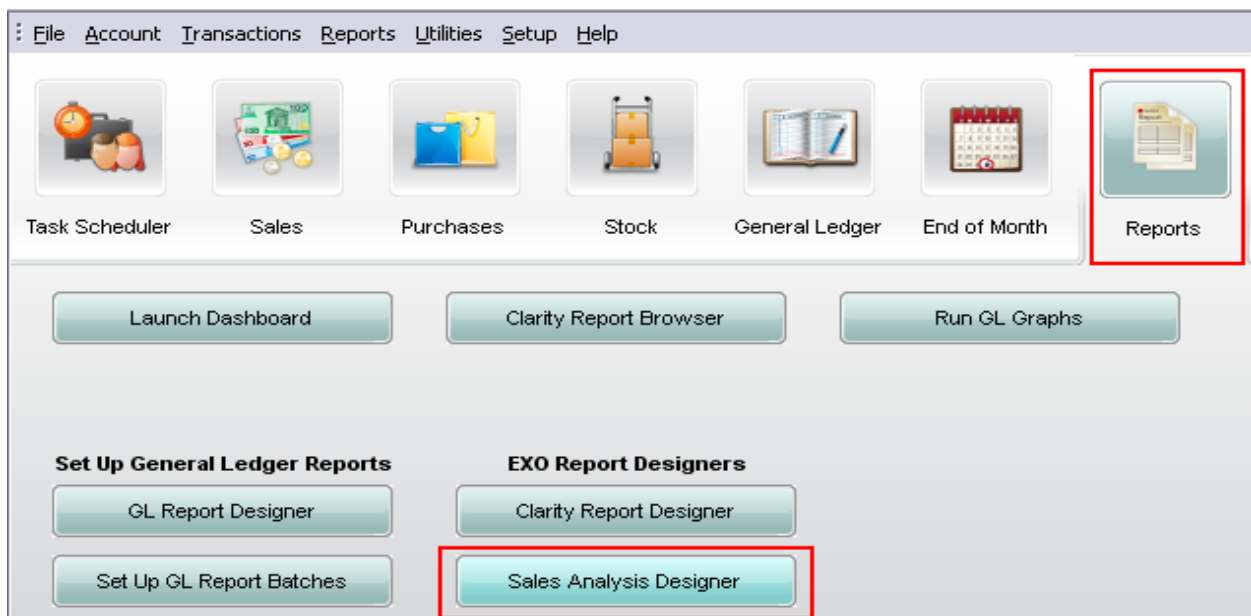
What is Sales Analysis Designer?

The Sales Analysis Designer uses a combination of preset report formats, common groupings and custom filters to let you quickly and accurately analyse your sales. A perfect tool for investigative analysis and for picking up on sales trends as they happen.

The combination of report types, common groupings, and custom filters mean you don't need any specialist report-writing expertise.

Where do I find it in the system?

Reports -> Sales Analysis Designer



Example

Sales Analysis Stock Item by Debtor Report Period March 2009

		MTD			YTD			LY MTD			LY YTD		
Code	Description	Sales	Cost	GP%	Sales	Cost	GP%	Sales	Cost	GP%	Sales	Cost	GP%
3. AUSSIE SPARES													
@		2,500.00	0.00	100.0 %	2,500.00	0.00	100.0 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
ACCOMM	ACCOMMODATION	453.73	450.00	0.8 %	453.73	450.00	0.8 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
AIRFIL01	OVALCHROME AIR FILTER	125.11	99.98	20.1 %	125.11	99.98	20.1 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
AIRFIL05	PRO-STLYE AIR FILTER	53.11	37.08	30.2 %	53.11	37.08	30.2 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
AIRSUS01	AIR SUSPENSION	250.30	177.23	29.2 %	250.30	177.23	29.2 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
ALARM01	REMOTE CAR START SECURITY	353.39	418.85	-18.5 %	353.39	418.85	-18.5 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
ALARM05	SECURITY ALARM	83.18	116.00	-39.5 %	83.18	116.00	-39.5 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %
ALLOY10114X6	ALLOY WHEELS STYLE 101 14X6.0	216.37	234.39	-8.3 %	3,292.37	3,242.03	1.5 %	0.00	0.00	0.0 %	0.00	0.00	0.0 %

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

How do I use it?

It's simple, just choose your report criteria from the options provided. Remember, you can't break it, just work through the options until you get the results you want to see.

The screenshot shows the 'Sales Analysis' window with the following sections:

- Report Type:** A dropdown menu set to 'Period'. Below it, a 'Period:' field shows '0. March 2009'.
- Groupings:** 'Main Group:' is set to 'Stock Item' and 'Secondary Group:' is set to 'No Groupings'.
- Other Options:**
 - ☒ Show Cost and Profit
 - ☐ Show Sales Only
 - ☐ Show Quantity Only
 - ☒ Show Cents
 - ☒ Show Sales to Branches (otherwise H/O)
 - ☐ Sort by Sales
 - ☐ Sort By Quantity
 - ☐ Hide Lookup Items
 - ☐ Add Subtotal Below Rpt
- Selection Criteria:** A large empty text area for defining criteria.
- Field/Condition/Value:** A section with dropdowns for 'Field:' (set to 'Debtor Acc'), 'Condition:' (set to '='), and 'Value:'. It includes an 'AND' button and an 'Add Criteria' button.

Report Type
Determines what the report will do

The 'Report Type' dropdown menu is open, showing the following options: Period, Date Range, Group Percent, Discounts, 12 Month Quantity, 12 Month Sales, 5 Weeks Qty, and 5 Weeks Sales.

Period / Date Range
Select the period or dates you want to report

The 'Period' dropdown menu is open, showing a list of periods: 0. March 2009, 1. February 2009, 2. January 2009, 3. December 2008, 4. November 2008, 5. October 2008, 6. September 2008, and 7. August 2008.

Date Range	
From Date:	23.03.2009
To Date:	23.03.2009
Preset Ranges:	None

Grouping of Report Results

Using the Group options you can create over 70 different combinations of Sales Reports. (Eg Sales and Margin by Sales Rep, then by Customer)

Grouping 1

Groupings	
Main Group:	Stock Item Primary Secondary Debtor Primary Group Secondary Group Location Branch Sales Rep

Grouping 2

Secondary Group:	Stock Item Primary Secondary Debtor Primary Group Secondary Group Location Branch Sales Rep
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Other options to tailor your Report

Other Options			
<input checked="" type="checkbox"/> Show Cost and Profit	<input checked="" type="checkbox"/> Show Cents	<input type="checkbox"/> Sort by Sales	<input type="checkbox"/> Hide Lookup Items
<input type="checkbox"/> Show Sales Only	<input checked="" type="checkbox"/> Show Sales to Branches (otherwise H/O)	<input type="checkbox"/> Sort By Quantity	<input type="checkbox"/> Add Subtotal Below Rpt
<input type="checkbox"/> Show Quantity Only			

Save your Reports

The selection criteria you create are saved as report definitions, so you or your business partner can copy and refine them later. You can also run these search criteria from the Clarity command line, so you can schedule the reports you create to run at preset times, such as overnight.

Add your Favourite Reports to a Menu

When you've created your favourite sales analysis reports, save them, then add them to your menu using the Menu Designer so you can re-run them any time.

F1 Help and MYOB EXO User Guide have more detailed instructions