How to use Sales Analysis Designer

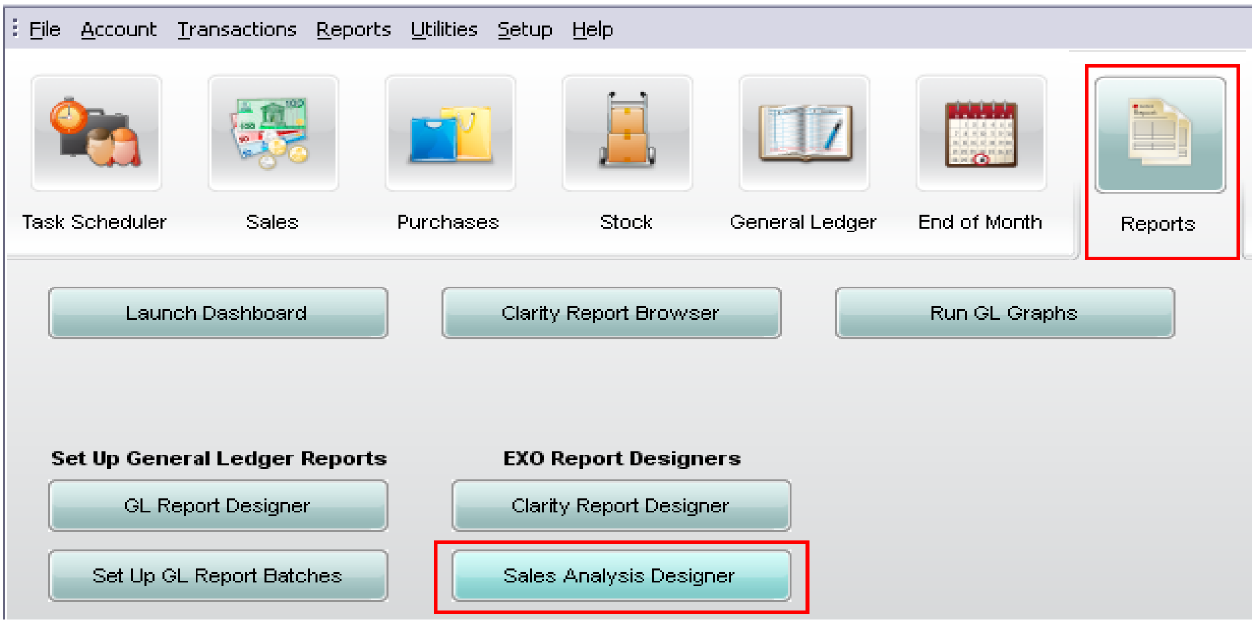
What is Sales Analysis Designer?

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 %

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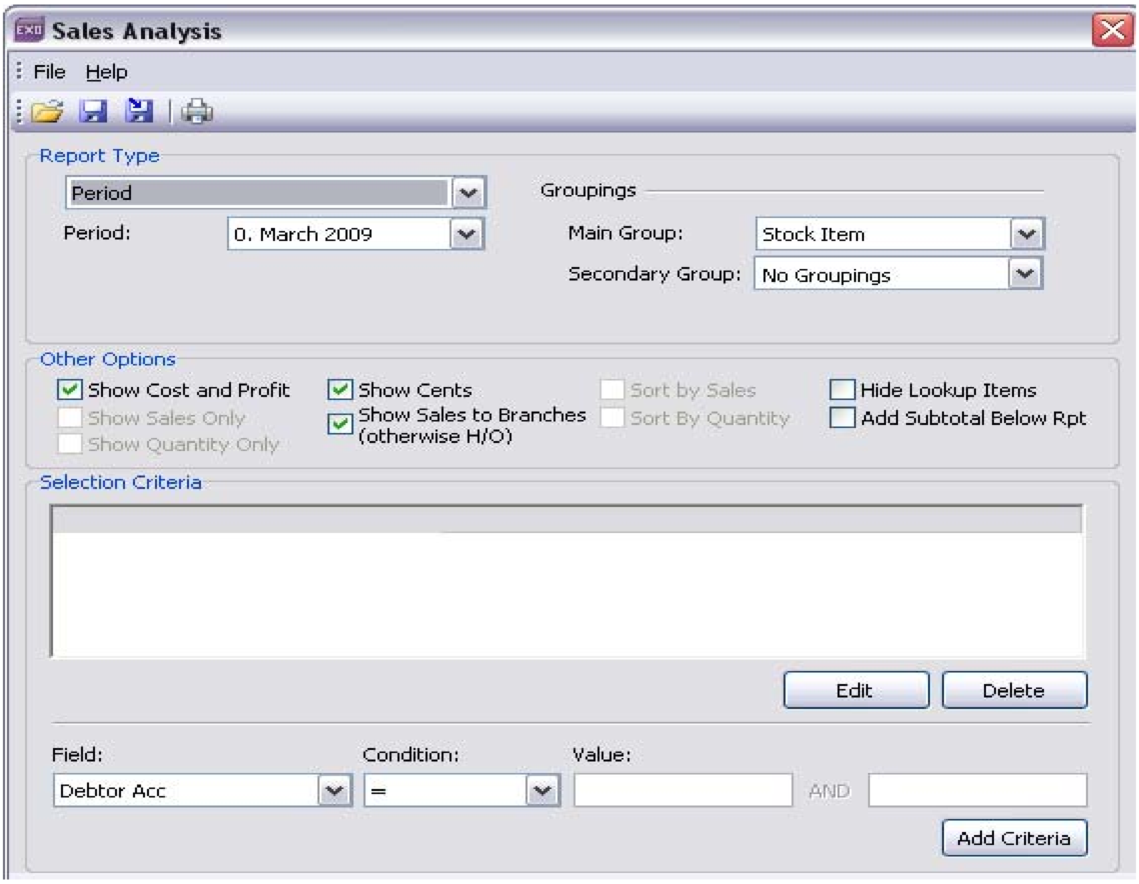
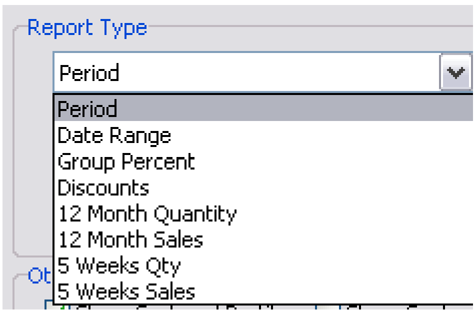
How do I use it?

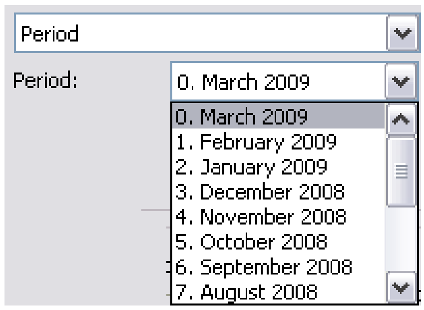
It's simple, just choose your report criteria from the options provided. Remember, you can't break it, just work through the options until you get the results you want to see.

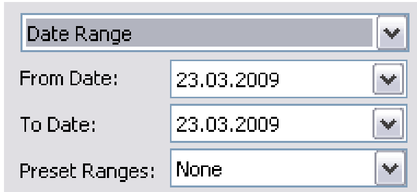


Report Type
Determines what the report will do



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

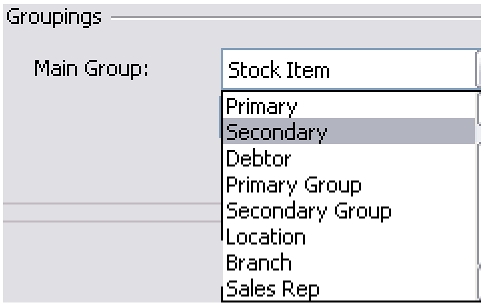




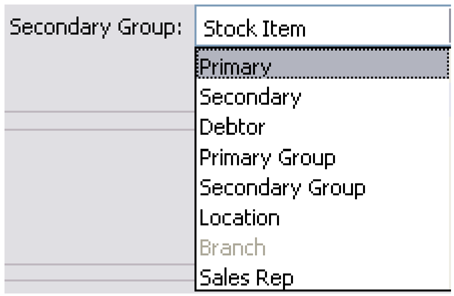
Grouping of Report Results

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

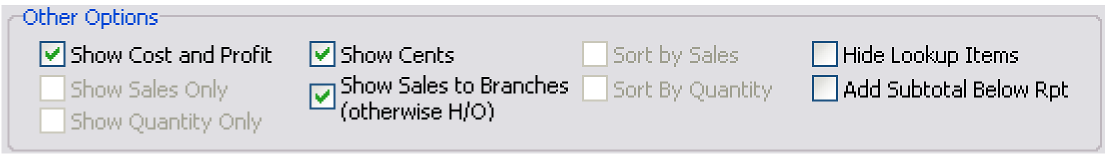
Grouping 1



Grouping 2



Other options to tailor your Report



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