Overview
Convert your raw sales data into meaningful information effortlessly. The Sales Analysis Report Generator enables you to generate summary and/or detailed reports using pre-defined formats (column headings) and sort sequences with user-defined filters and customization options. This powerful feature of dynaMACS provides you with virtually limitless possibilities for generating vital sales and commission reports.

This document is intended to help you maximize the benefits of Sales Analysis Reports.

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Overview:
Most sales analysis reports should be printed using Shipment as the source.

If your agency does not utilize the optional Commission Reconciliation Module:

♦ Shipment is your ONLY available option.

If your agency does utilize the optional Commission Reconciliation Module:

♦ Commission Received is an available option for Source of Data.

♦ Generally, Shipment reports will reflect sales and commission amounts based on shipment information entered from invoices.

  o These reports will accurately reflect true sales figures and should be used on reports that may be discussed with a customer or manufacturer

♦ Commission Received reports will reflect sales and commission amounts based on actual commissions posted.

♦ These reports reflect when an agency was paid on previous sales. These reports are typically used for payroll, budgeting and accounting purposes.
### Step 2: Column Set (Headings)

**Overview:**

Step 2 of generating a Sales Analysis Report in dynaMACS requires the user to select a “Column Set (Headings).” The format determines what column headings and associated data fields will appear on the report. The chart below lists each of the available formats in dynaMACS. For each format, the type of data included on the report is listed along with special features and which example reports use that format.

<table>
<thead>
<tr>
<th>Format Group</th>
<th>Format</th>
<th>Information Included on Report</th>
<th>Special Features</th>
<th>Example Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Only</td>
<td>J</td>
<td>Sales</td>
<td>Simple, Basic Sales Analysis</td>
<td>J X - Simple, Basic Sales Analysis</td>
</tr>
<tr>
<td></td>
<td>K</td>
<td>Sales</td>
<td>Current, Last &amp; Previous Year-to-Dates</td>
<td>K X - Current, Last &amp; Previous Year-to-Dates</td>
</tr>
<tr>
<td></td>
<td>G1</td>
<td>Sales</td>
<td>Includes Percent of Total Sales</td>
<td>G1 X - Includes Percent of Total Sales</td>
</tr>
<tr>
<td></td>
<td>3Y</td>
<td>Sales</td>
<td>Individual Months for 3 Years</td>
<td>3Y X - Individual Months for 3 Years</td>
</tr>
<tr>
<td></td>
<td>R</td>
<td>Sales &amp; Agency Commission</td>
<td>Sales with comparison &amp; Commission</td>
<td>R X X - Sales with comparison &amp; Commission</td>
</tr>
<tr>
<td></td>
<td>X</td>
<td>Sales</td>
<td>Includes Average Commission Rates</td>
<td>X X X - Includes Average Commission Rates</td>
</tr>
<tr>
<td></td>
<td>G2</td>
<td>Sales</td>
<td>Includes Percent of Total Commission</td>
<td>G2 X X - Includes Percent of Total Commission</td>
</tr>
<tr>
<td></td>
<td>KA</td>
<td>Agency Commission</td>
<td>Current, Last &amp; Previous Year-to-Dates</td>
<td>KA X - Current, Last &amp; Previous Year-to-Dates</td>
</tr>
<tr>
<td></td>
<td>G3</td>
<td>Agency Commission</td>
<td>Includes Percent of Total Commission</td>
<td>G3 X - Includes Percent of Total Commission</td>
</tr>
<tr>
<td></td>
<td>3YA</td>
<td>Agency Commission</td>
<td>Individual Months for 3 Years</td>
<td>3YA X X - Individual Months for 3 Years</td>
</tr>
<tr>
<td>SalesRep Commission</td>
<td>R3</td>
<td>SalesRep</td>
<td>Simple Sales &amp; Sales RepCommission</td>
<td>R3 X X - Simple Sales &amp; Sales RepCommission</td>
</tr>
<tr>
<td></td>
<td>JR</td>
<td>SalesRep</td>
<td>SalesRep Commission Only</td>
<td>JR X - SalesRep Commission Only</td>
</tr>
<tr>
<td></td>
<td>KR</td>
<td>SalesRep</td>
<td>Current, Last &amp; Previous Year-to-Dates</td>
<td>KR X - Current, Last &amp; Previous Year-to-Dates</td>
</tr>
<tr>
<td></td>
<td>3YR</td>
<td>SalesRep</td>
<td>Individual Months for 3 Years</td>
<td>3YR X X - Individual Months for 3 Years</td>
</tr>
<tr>
<td>Goal Tracking</td>
<td>Z1</td>
<td>Goal</td>
<td>Worksheet for Sales</td>
<td>Z1 X X - Worksheet for Sales</td>
</tr>
<tr>
<td></td>
<td>Z1C</td>
<td>Goal</td>
<td>Worksheet for Sales &amp; Commission</td>
<td>Z1C X X - Worksheet for Sales &amp; Commission</td>
</tr>
<tr>
<td></td>
<td>Z2</td>
<td>Goal</td>
<td>Year-to-Date Sales Goal</td>
<td>Z2 X X - Year-to-Date Sales Goal</td>
</tr>
<tr>
<td></td>
<td>Z3</td>
<td>Goal</td>
<td>Annual Sales Goal</td>
<td>Z3 X X - Annual Sales Goal</td>
</tr>
<tr>
<td></td>
<td>Z4</td>
<td>Goal</td>
<td>Year-to-Date Sales &amp; Commission Goal</td>
<td>Z4 X X X - Year-to-Date Sales &amp; Commission Goal</td>
</tr>
<tr>
<td></td>
<td>Z5</td>
<td>Goal</td>
<td>Annual Sales &amp; Commission Goal</td>
<td>Z5 X X - Annual Sales &amp; Commission Goal</td>
</tr>
</tbody>
</table>
Sales Analysis Reports

Format Examples

Sales Only
These formats present sales information only. Because they contain NO commission information, they are ideally suited for use with Customers and Manufacturers. These formats also work well with agencies that do not share commission information with Sales Reps.

Format: J

Last *************** S A L E S ***************
Actvy CurMo LYCurMo CurYTD LstYTD $ Variance % LYTtl
10/11 433,526 336,726 4088,738 3810,670 278,068 +7% 4580,807

Format: K

Last ************************************** S A L E S **************************************
Actvy CurMo CURYTD (L)stYTD (P)rvYTD (C)vs(L) Variance (C)vs(P) LYTtl
10/11 433,526 4088,738 3810,670 2981,895 278,068 +7% 1106,843 +37% 4580,807

Format: G1

Last ************************** S A L E S ***************************************************
Actvy CurMo LYCurMo CurYTD LstYTD $ Variance % LYTtl YTY LYT
10/11 433,526 336,726 4088,738 3810,670 278,068 +7% 4580,807 100 100

Format: 3Y

------------------------------- MONTHLY S A L E S -------------------------------
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec YTD/ Total
2011 298,963 368,923 382,449 518,270 426,222 420,858 357,558 476,111 503,396 331,328 433,526 4088,738
2010 179,732 322,896 279,082 367,221 335,759 440,226 624,293 583,819 342,614 336,726 484,755 4580,807
Sales & Agency Commission

These formats present sales and agency commission information. Because they DO contain commission information, they should be used with some discretion. These formats should NOT be used on reports that are likely to be viewed by Customers.

**Format: E**

<table>
<thead>
<tr>
<th>Last</th>
<th>Actvy</th>
<th>CurMo</th>
<th>ThsYTD</th>
<th>LstYTD</th>
<th>LYTtl</th>
<th>Actvy</th>
<th>CurMo</th>
<th>ThsYTD</th>
<th>LstYTD</th>
<th>LYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>4088,738</td>
<td>3810,670</td>
<td>4580,807</td>
<td>25,019</td>
<td>218,118</td>
<td>194,941</td>
<td>238,562</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Format: R**

<table>
<thead>
<tr>
<th>Last</th>
<th>Actvy</th>
<th>CurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance</th>
<th>%</th>
<th>LYTtl</th>
<th>Actvy</th>
<th>CurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance</th>
<th>%</th>
<th>LYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>4088,738</td>
<td>3810,670</td>
<td>278,068</td>
<td>+7%</td>
<td>4580,807</td>
<td>25,019</td>
<td>218,118</td>
<td>238,562</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Format: X**

<table>
<thead>
<tr>
<th>CurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance</th>
<th>%</th>
<th>LYTtl</th>
<th>CurMo</th>
<th>CurYTD</th>
<th>Mo%</th>
<th>YTD%</th>
<th>LY%</th>
</tr>
</thead>
<tbody>
<tr>
<td>433,526</td>
<td>4088,738</td>
<td>3810,670</td>
<td>278,068</td>
<td>+7%</td>
<td>4580,807</td>
<td>25,019</td>
<td>218,118</td>
<td>5.77</td>
<td>5.33</td>
<td>5.21</td>
</tr>
</tbody>
</table>

**Format: G2**

<table>
<thead>
<tr>
<th>Last</th>
<th>Actvy</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>Var$</th>
<th>Var%</th>
<th>LYTtl</th>
<th>CurYTD</th>
<th>LYTtl</th>
<th>YTD</th>
<th>LYT</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>4088,738</td>
<td>3810,670</td>
<td>278,068</td>
<td>+7%</td>
<td>4580,807</td>
<td>218,118</td>
<td>238,562</td>
<td>100</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>
Agency Commission Only
These formats present agency commission information only. Because they contain ONLY commission information, they should be used with care. These formats are extremely helpful in evaluating the bottom line. After all, you don’t put sales dollars in the bank!

**Format: JA**

<table>
<thead>
<tr>
<th>Last</th>
<th>Actvy</th>
<th>CurMo</th>
<th>LYCurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance</th>
<th>%</th>
<th>LYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>18/11</td>
<td>25,019</td>
<td>17,499</td>
<td>218,118</td>
<td>194,941</td>
<td>23,177</td>
<td>+12%</td>
<td></td>
<td>238,562</td>
</tr>
</tbody>
</table>

**Format: KA**

<table>
<thead>
<tr>
<th>Last</th>
<th>Actvy</th>
<th>CurMo</th>
<th>(C)urYTD</th>
<th>(L)stYTD</th>
<th>(P)rvYTD</th>
<th>(C)vs(L) Variance</th>
<th>(C)vs(P)</th>
<th>LYTtl</th>
<th>%</th>
<th>YTD</th>
<th>LY</th>
</tr>
</thead>
<tbody>
<tr>
<td>18/11</td>
<td>25,019</td>
<td>218,118</td>
<td>194,941</td>
<td>161,879</td>
<td>23,177</td>
<td>+12%</td>
<td>56,239</td>
<td>238,562</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Format: G3**

<table>
<thead>
<tr>
<th>Last</th>
<th>Actvy</th>
<th>CurMo</th>
<th>LYCurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance</th>
<th>%</th>
<th>LYTtl</th>
<th>YTD</th>
<th>LY</th>
</tr>
</thead>
<tbody>
<tr>
<td>18/11</td>
<td>25,019</td>
<td>17,499</td>
<td>218,118</td>
<td>194,941</td>
<td>23,177</td>
<td>+12%</td>
<td></td>
<td>238,562</td>
<td>100</td>
<td>100</td>
</tr>
</tbody>
</table>

**Format: 3YA**

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>15,971</td>
<td>20,144</td>
<td>21,175</td>
<td>29,509</td>
<td>23,909</td>
<td>13,598</td>
<td>24,094</td>
<td>25,197</td>
<td>19,502</td>
<td>25,019</td>
<td>218,118</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>9,492</td>
<td>16,536</td>
<td>15,645</td>
<td>20,361</td>
<td>18,257</td>
<td>20,593</td>
<td>32,248</td>
<td>27,728</td>
<td>16,582</td>
<td>17,499</td>
<td>22,922</td>
<td>20,699</td>
</tr>
<tr>
<td>2009</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
<td>16,221</td>
</tr>
</tbody>
</table>
**Sales Rep Commission**

These formats present Sales Rep commission information. The R3 Format also shows limited Sales Information. These formats are helpful for the Sales Rep to monitor what contributes to his/her bottom line. They typically are not used for printing the actual commission statement. A Posted Sales (or Commissions) Report should be used for that purpose because it lists individual invoices.

### Format: R3

<table>
<thead>
<tr>
<th>Last</th>
<th>Sales</th>
<th>REP Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actvy</td>
<td>CurMo</td>
<td>CurYTD</td>
</tr>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>4088,738</td>
</tr>
</tbody>
</table>

### Format: JR

<table>
<thead>
<tr>
<th>Last</th>
<th>Rep Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actvy</td>
<td>CurMo</td>
</tr>
<tr>
<td>10/11</td>
<td>10,990</td>
</tr>
</tbody>
</table>

### Format: KR

<table>
<thead>
<tr>
<th>Last</th>
<th>Rep Commission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actvy</td>
<td>CurMo</td>
</tr>
<tr>
<td>10/11</td>
<td>10,990</td>
</tr>
</tbody>
</table>

### Format: 3YR

<table>
<thead>
<tr>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>7,083</td>
<td>8,843</td>
<td>9,244</td>
<td>12,848</td>
<td>10,498</td>
<td>5,972</td>
<td>10,482</td>
<td>10,892</td>
<td>8,424</td>
<td>10,990</td>
<td>95,276</td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>4,123</td>
<td>7,241</td>
<td>6,777</td>
<td>8,894</td>
<td>7,942</td>
<td>9,078</td>
<td>14,012</td>
<td>11,972</td>
<td>7,198</td>
<td>7,712</td>
<td>10,157</td>
<td>104,106</td>
</tr>
<tr>
<td>2009</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>7,057</td>
<td>6,981</td>
<td>6,718</td>
<td>6,073</td>
</tr>
</tbody>
</table>
Goal Tracking
These formats are used exclusively with the Optional Goal Tracking Module.

### Format: Z1

<table>
<thead>
<tr>
<th>SalesRep</th>
<th>Manufacturer Customer</th>
<th>Name</th>
<th>City</th>
<th>StaActv</th>
<th>NextTtl</th>
<th>CurTtl</th>
<th>CurYTD</th>
<th>LYTtl</th>
<th>PYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>02 LJM</td>
<td>ABBH00-</td>
<td>Abbott Health</td>
<td>Louisville</td>
<td>10/11</td>
<td>_______</td>
<td>25,366</td>
<td>23,840</td>
<td>17,592</td>
<td></td>
</tr>
</tbody>
</table>

### Format: Z1C

<table>
<thead>
<tr>
<th>SalesRep</th>
<th>Manufacturer Customer</th>
<th>Name</th>
<th>City</th>
<th>StaActv</th>
<th>NextTtl</th>
<th>Comm%</th>
<th>CurYTD</th>
<th>LYTtl</th>
<th>PYTtl</th>
<th>CurYTD</th>
<th>LYTtl</th>
<th>AvgComm%</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>02 LJM</td>
<td>ABBH00-</td>
<td>Abbott Health</td>
<td>Louisville</td>
<td>10/11</td>
<td>_______</td>
<td>8.74</td>
<td>25,366</td>
<td>23,840</td>
<td>17,592</td>
<td>5.23</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Format: Z2

<table>
<thead>
<tr>
<th>Actvy</th>
<th>CurMo</th>
<th>LYCurMo</th>
<th>Var%-GOAL-YTD</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance %</th>
<th>LYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>336,726</td>
<td>4088,738</td>
<td>3810,670</td>
<td>278,068</td>
<td>+7%</td>
<td>4580,807</td>
</tr>
</tbody>
</table>

### Format: Z3

<table>
<thead>
<tr>
<th>Actvy</th>
<th>CurMo</th>
<th>LYCurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance %</th>
<th>LYTtl</th>
<th>CurTtl</th>
<th>Rel%</th>
<th>CurTtl</th>
<th>Rel%</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>336,726</td>
<td>4088,738</td>
<td>3810,670</td>
<td>278,068</td>
<td>+7%</td>
<td>4580,807</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Format: Z4

<table>
<thead>
<tr>
<th>Actvy</th>
<th>CurMo</th>
<th>CurYTD</th>
<th>GoalYTD</th>
<th>$ Variance %</th>
<th>CurMo</th>
<th>CurYTD</th>
<th>GoalYTD</th>
<th>Var$</th>
<th>Var%</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>4088,738</td>
<td>4088,738</td>
<td>25,019</td>
<td>218,118</td>
<td>218,118</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Format: Z5

<table>
<thead>
<tr>
<th>Actvy</th>
<th>CurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance %</th>
<th>LYTtl</th>
<th>CurTtl</th>
<th>ReL%</th>
<th>CurTtl</th>
<th>ReL%</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11</td>
<td>433,526</td>
<td>4088,738</td>
<td>3810,670</td>
<td>278,068</td>
<td>+7%</td>
<td>4580,807</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Overview

Step 3 of generating a Sales Analysis Report involves selecting the sequence the report should be printed. There are numerous pre-defined sequences built-in to dynaMACS.

For example: SortBy:  S2  SalesRep / Customer / Manufacturer

S2 is an arbitrary code assigned to this report sequence. The description identifies how the report will be sequenced and what sub-totals to expect. This report will:

♦   Skip to a new page for each SalesRep
♦   Print the customers within the SalesRep territory
♦   Print totals for each manufacturer the customer buys from
♦   Print the total for all manufacturers for each customer
♦   Print the total for all customers for each Sales Rep
♦   All reports print an Agency Total on the final page

### Step 3: SortBy

#### SalesRep / Customer / Manufacturer Report

*Sales as of 10/2011*

<table>
<thead>
<tr>
<th>Customer</th>
<th>Actvy</th>
<th>CurMo</th>
<th>LYCurMo</th>
<th>CurYTD</th>
<th>LstYTD</th>
<th>$ Variance %</th>
<th>LYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adel's Dist / Cinci</td>
<td>10/11</td>
<td>11,471</td>
<td>166,203</td>
<td>222,816</td>
<td>177,454</td>
<td>-25%</td>
<td>257,311</td>
</tr>
<tr>
<td>Apical Alloy Company</td>
<td>12/10</td>
<td>11,471</td>
<td>11,149</td>
<td>166,203</td>
<td>222,816</td>
<td>-25%</td>
<td>257,311</td>
</tr>
<tr>
<td>Lee Jacob Mfg</td>
<td>10/11</td>
<td>11,471</td>
<td>11,149</td>
<td>166,203</td>
<td>222,816</td>
<td>-25%</td>
<td>257,311</td>
</tr>
<tr>
<td>MNC Company</td>
<td>10/11</td>
<td>11,471</td>
<td>11,149</td>
<td>166,203</td>
<td>222,816</td>
<td>-25%</td>
<td>257,311</td>
</tr>
<tr>
<td>Simpsons Part Supply</td>
<td>10/11</td>
<td>11,471</td>
<td>11,149</td>
<td>166,203</td>
<td>222,816</td>
<td>-25%</td>
<td>257,311</td>
</tr>
</tbody>
</table>

*Total Cust ADED00CI*  10/11  14,784  13,518  185,548  237,668  52,120-  -22%  278,972

#### Manufacturer / Customer Report

*Sales as of 10/2011*

<table>
<thead>
<tr>
<th>SalesRep Customer</th>
<th>Actvy</th>
<th>CurMo</th>
<th>(C)urYTD</th>
<th>(L)stYTD</th>
<th>(P)rvYTD</th>
<th>(C)vs(L) Variance (C)vs(P)</th>
<th>LYTtl</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adel's Dist / Cinci</td>
<td>10/11</td>
<td>11,471</td>
<td>166,203</td>
<td>222,816</td>
<td>177,454</td>
<td>-25%</td>
<td>257,311</td>
</tr>
<tr>
<td>Achin Welding Co</td>
<td>10/11</td>
<td>13,367</td>
<td>173,702</td>
<td>93,353</td>
<td>71,853</td>
<td>+86%</td>
<td>115,611</td>
</tr>
<tr>
<td>Agora Metals</td>
<td>10/11</td>
<td>3,391</td>
<td>67,187</td>
<td>55,975</td>
<td>44,286</td>
<td>+20%</td>
<td>61,460</td>
</tr>
<tr>
<td>Adel’s Dist / Dayton</td>
<td>10/11</td>
<td>1,381</td>
<td>53,715</td>
<td>42,716</td>
<td>32,345</td>
<td>+26%</td>
<td>58,796</td>
</tr>
<tr>
<td>American Instruments</td>
<td>10/11</td>
<td>10,316</td>
<td>66,400</td>
<td>49,834</td>
<td>38,619</td>
<td>+86%</td>
<td>57,502</td>
</tr>
<tr>
<td>Babson Tooling</td>
<td>10/11</td>
<td>5,070</td>
<td>35,261</td>
<td>35,261</td>
<td>27,671</td>
<td>-1%</td>
<td>45,981</td>
</tr>
<tr>
<td>Antenna Development</td>
<td>09/10</td>
<td>234</td>
<td>187</td>
<td>234</td>
<td>187</td>
<td>-100%</td>
<td>234</td>
</tr>
<tr>
<td>Alert Alarm Design C</td>
<td>08/11</td>
<td>415</td>
<td>225</td>
<td>177</td>
<td>190</td>
<td>+84%</td>
<td>225</td>
</tr>
<tr>
<td>Air Plating Co</td>
<td>09/10</td>
<td>27</td>
<td>21</td>
<td>27-100%</td>
<td>21-100%</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Acme Sign Company</td>
<td>10/11</td>
<td>1,777</td>
<td>1,777</td>
<td>1,777</td>
<td>1,777</td>
<td>1,777</td>
<td></td>
</tr>
<tr>
<td>Baka Steel Company</td>
<td>10/11</td>
<td>488</td>
<td>1,769</td>
<td>1,769</td>
<td>1,769</td>
<td>1,769</td>
<td></td>
</tr>
<tr>
<td>Total Mfg <em>LJM</em></td>
<td>10/11</td>
<td>79,991</td>
<td>887,159</td>
<td>752,737</td>
<td>586,342</td>
<td>+18%</td>
<td>910,036</td>
</tr>
</tbody>
</table>

*Another example: SortBy:  M3  Manufacturer / Customer*

Again, M3 is an arbitrary code assigned to this report sequence. This report will:

♦   Skip to a new page for Manufacturer
♦   Print totals for each customer the manufacturer sells to
♦   Print the total for all customers for each manufacturer
♦   All reports print an Agency Total on the final page
Listed below are all the pre-defined SortBy options available:

**SalesRep Reports**

S0  SalesRep
SA1 SalesRep / Customer
S2  SalesRep / Customer / Manufacturer
SC1 SalesRep / Customer / MfgRel / Mfg
SL4 SalesRep / Customer(State-Cty) / Mfg
SL6 SalesRep / Customer(Zip) / Mfg
SD  SalesRep / Division / Manufacturer
S3  SalesRep / Manufacturer
S1  SalesRep / Manufacturer / Customer
Z1  SalesRep / Manufacturer / Customer
SR  SalesRep / MfgRel / Customer
SR1 SalesRep / MfgRel / Mfg / Customer
SL5 SalesRep / State / Customer(Cty) / Mfg

**Reports based on SalesRep Classifications**

B1  Branch
BS3 Branch / SalesRep

**Manufacturer Reports**

M0  Manufacturer
M3  Manufacturer / Customer
MC1 Manufacturer / CustomerType / Customer
MD0 Manufacturer / Division
MD2 Manufacturer / Division / Customer
MD1 Manufacturer / Division / SalesRep
M2  Manufacturer / SalesRep
M1  Manufacturer / SalesRep / Customer
ML0 Manufacturer / State / SalesRep

**Reports based on Manufacturer Classifications**

R1  MfgRel
RC  MfgRel / Customer
RM  MfgRel / Manufacturer
RM2 MfgRel / Manufacturer
RM1 MfgRel / Manufacturer / Customer
RMS MfgRel / Manufacturer / SalesRep
RSM MfgRel / SalesRep / Manufacturer

T1  MfgType
TMC MfgType / Customer
TM  MfgType / Manufacturer
TM0 MfgType / Manufacturer / Customer
TMS MfgType / SalesRep / Mfg / Customer
TML MfgType / State
Customer Reports

- C1 Customer
- C2 Customer / Manufacturer
- CM Customer / MfgRel / Manufacturer
- CX Customer Alpha

Reports based on Customer Classifications

- A1 CustomerABC
- AC CustomerABC / Customer
- AC1 CustomerABC / Customer / Mfg

- CR CustomerRel

- CT CustomerType
- CT2 CustomerType / SalesRep

- D1 Division
- DC Division / Customer

- LS State
- LS1 State / City
- LS2 State / City / Customer / Manufacturer
- LS3 State / Manufacturer
- L0 State / Region
- L1 State / Region / City
- L3 State / Region / City / Customer
- L2 State / Region / City / Manufacturer
- LS4 State / SalesRep

- LR StateRegion
- LR1 StateRegion / Customer
- LR2 StateRegion / Customer / Manufacturer

- LG Region
- LG1 Region / Customer
- LG2 Region / Customer / Manufacturer

Mfg/Customer Cross Reference Reports

- XS X-Ref Source
- XC X-Ref Source / Customer
- XM X-Ref Source / Manufacturer
- XM1 X-Ref Source / Manufacturer / Customer
Overview
The options feature in Sales Analysis Reports, enable the user to customize a report to fit specific agency requirements.

Filters / Range
This option enables the user to filter the report to include (or exclude) certain sales and commission records.

Up to four of the following fields may be combined to filter the contents of any Sales Analysis Report:

3  Mfg Code
4  Cust Code
5  Cust Location
6  Rep Code
7  Cust Lookup
8  Cust ABC
9  Cust Type
10 Cust Divison
11 Cust State/Reg
12 Cust State
13 Cust Region
14 Cust ZipCode
16 Cust City
17 Cust Related
18 Cust Status
19 Rep Branch
20 Rep Status
21 Mfg Type
22 Mfg Related
23 Mfg Status
24 Xrf Source
26 L.Act yyyyymmdd
27 Cust Lists
Step 4: Options (continued)

Sub-Total By:
This option enables the user modify the selected Sort By. Selecting any one of the following fields will add an additional sub-total to the report for the field:

0  Standard Sort
1  SalesRep
2  SalesRep Branch
3  Manufacturer
4  Mfg Related
5  Mfg Type
6  CustomerDivisn
7  Customer Type
8  Customer ABC
9  Customer State
10  Customer StReg
11  CustomerRelated
12  X-Ref Source

Example: An agency has classified all customers as either OEM or Distribution using the Customer Division. The agency wants to evaluate sales and commissions for all manufacturers within each Division. There is no pre-defined Division / Manufacturer Sort By. However, the exact same result is obtained by selecting the M0 Manufacturer Sort By and then Sub-Total By: Field #6 - Customer Division.

Descend By:
This option enables the user rank the lowest level of sub-totals on the selected Sort By based on any of the following fields:

0  Turn off Descending
1  Sales-CurrMo
2  Sales-ThisYTD
3  Sales-LastYTD
4  Sales-LastYrTtl
5  Comm -CurrMo
6  Comm -ThisYTD
7  Comm -LstYrTtl
8  Forecast-ThisYear
9  Sales-Comp YTDs

Example: An agency wants to rank all the customers that buy from each manufacturer based on Year-to-Date Sales. They would select Sort By: M3 Manufacturer / Customer and then Descend By: Field #2 Sales –This YTD.
Descend By: (continued)

Select Range or Top / Bottom

If the Descend By: option is activated, the following screen appears after selecting a field:

![Screen Capture](image)

This enables the user to print records based on a range of values for the selected field, just the Top and/or Bottom records or All records or both.

Print As-of-Month/Year
This option enables the user to print the report based on any previous or future point in time. By default, the Month and Year is set to 1 month prior to the current Process Month.

End-of-Year Month:
This option enables the user to base all the amounts on the report on any Fiscal Year, determined by the month selected with this option. By default, the End-of-Year Month is set to 12 (December).

Summarize Related Manufacturers?
This option enables users with multiple manufacturers related to a single manufacturer to summarize the multiple manufacturers into a single total.

Customer Print Name/Address?
This option is available on reports where the customer has subtotals printed below. The Sort By: S2 SalesRep / Customer / Manufacturer is an example. When this box is checked, the full name and address will print. If the box is unchecked, only the customer name will print.

Summarize Locations?
This option is available on reports with customer subtotals. When this box is checked, locations will be summarized and just the total for the Headquarters will print. This option is particularly helpful when ranking customers…the individual locations may appear numerous times on the report without this option checked.
Sales Analysis Reports
Worksheet

Report Description: ____________________________________________

Frequency: _____________________________ Distribution: _____________________________

Prepared By: _____________________________ Date: _____________________________

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Step 1. Source:  
☐ Shipments  ☐ Commission Recd
Notes: ____________________________________________

Step 2. Format: _______ Notes: ____________________________________________

Step 3. Sort By:_______ Notes: ____________________________________________

Step 4. (Optional)

General:

☐ Filters/Range:  
Field From  Thru  Include/Exclude And/Or
☐ /☐  ☐ /☐  ☐ /☐  ☐ /☐
☐ /☐  ☐ /☐  ☐ /☐  ☐ /☐
☐ /☐  ☐ /☐  ☐ /☐  ☐ /☐
☐ /☐  ☐ /☐  ☐ /☐  ☐ /☐

Notes: ____________________________________________

☐ Additional Sort/Sub-Total By: _____________
Notes: ____________________________________________

☐ Sort Report Descending By: _____________
☐ Filter?  ☐ Range_ _____________
☐ Top/Bottom _____________
Notes: ____________________________________________

☐ Print As of Month/Year:____ / ____  End of Year Month: _____
Notes: ____________________________________________

☐ Replace Current Month with________________________________________

☐ Skip Page________________________________________

Manufacturer Options

☐ Replace Manufacturer with Related Manufacturer?
Notes: ____________________________________________

Customer Options

☐ Print Customer Name/Address?
Notes: ____________________________________________

☐ Summarize Customer Locations?
Notes: ____________________________________________