

SALES ANALYSIS GENERATOR

Description:

The Sales Analysis Report Generator is a report writer which compiles sales in units, dollars and cost with many subtotal and grand total options. Reports may be printed with or without profit, with detail or in summary. They can be used to calculate commissions if careful attention is paid to correct cost when sales invoices are updated. The only way to completely understand this powerful tool is to experiment with it.

There are two report options: **Detail** sales analysis which has the DETAIL option as well as two subtotal options. **Summary** which has more subtotal and grand total fields from which to select.

F7 - Start Over and **F8 - Quit** are available during option selection.

Menu Select:

From the The Complete Jobber Main Menu, select - *Sales Analysis Generator*.

Sales Analysis Generator

- Summary Sales Analysis
- Detail Sales Analysis

Sect Summary Sales Analysis (Sales Analysis Generator)

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Display report on screen

Enter todays date 01/18/2013

1. Salesman    2. Driver        3. Territory    4. Industry    5. Customer
6. Location    7. Department    8. GL code      9. Category    10. Item
Select field number for Grand Totals 7      Sort: 1 Numeric 2 Alpha 2
Select field number for Subtotals 6      Sort: 1 Numeric 2 Alpha 2

C Current files  H History files  B Both C

Select range: 1 Dates  2 Batches  3 Both 1
Date range 12/01/2012 12/31/2012  Batch range

Print misc items? N      Selection criteria?

Profit option: 1 Gm%  2 Roi%  3 Profit/Gal  4 No profit 3
Cost option: 1 Gross cost  2 Net cost  3 Recalc Rack 1

Include freight per gallon in cost of sales? (Y/N) N
Is everything ok? (Y/N/P=Printer/Q=Quit) Y
    
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Options for Sales Analysis by Location and Department with Profit per gallon

LOC	9	Terminal	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
DEPTNO	1	GASOLINE	1284791.70	2813961.27	2729324.56	84636.71	0.0659
DEPTNO	2	DIESEL	128176.60	272100.29	265150.23	6950.06	0.0542
Totals for Terminal			1412968.30	3086061.56	2994474.79	91586.77	0.0648
Grand Totals			1412968.30	3086061.56	2994474.79	91586.77	0.0648

Report by Department (subtotals) and Location (grand totals) with profit per gallon

Printer. Enter **S** to print the report on the screen. Enter **P** to print to the printer and select the desired printer. Enter **F** to print to a Text File and enter the full path and desired file name. Enter **Q** to return to the menu without printing.

Enter The Date. The current system date displays. Press *enter* to accept the date or enter a report date. This date has no affect on the report.

Select field number for Grand Totals.

Select field number for Subtotals.

Note: The field values are captured at invoice update time.

Enter **C** to search Current Files - current period dates or batches

Enter **H** to search History Files - previous period dates or batches

Enter **B** to search both Current and History-batches or dates from both current and history

Enter **1** to enter a range of Dates

Enter **2** to enter a range of Batches

Enter **3** to enter a range of Dates AND a range of Batches

Print misc items?

Enter **N** to exclude misc items such as freight, surcharge, loadfee, CC fees, etc. from the report. Grand total profit amounts will be more accurate if misc items are excluded.

Enter **Y** to include items with department 9999 and stock code M. This will distort the overall profit percent because Misc items do not have any direct cost.

Selection Criteria?

Enter **N** to print the report without selecting a filtering criteria.

Enter **Y** to select a filtering criteria to narrow the report to specific customers, department, items, etc.

Profit Option:

Enter **1** to print the profit in **GM%** (Gross Margin percent) format.

Enter **2** to print the profit in **ROI%** (Return on Investment percent) format.

Enter **3** to print the profit in **Profit/Gal** (Profit per Gallon or unit) format.

Enter **4** to print with **NO Profit**. The report will print without Cost or profit calculation. This is a good option to use if you have to send the report to a customer.

Cost Option:

Enter **1** to use **Gross Cost** (Gross rack prices).

Enter **2** to use **Net Cost** (Net rack prices if different from gross).

Enter **3** to **Recalc Rack** (Recalculate the rack prices before printing the report).

Include freight per gallon in cost of sales? (Y/N)

Enter **N** to print the report without freight.

Enter **Y** to include freight calculated in the BOL module but NOT included in the price of the fuel. Also, if freight is entered in the freight bill module and attached to BOLs, it can be included in the cost for reporting purposes only, for profit calculation.

Is Everything Ok? (Y/N/P=Printer/Q=Quit). To print the report using the selected printer or screen, press **Y**. To change to a different printer or print option, press **P**. To quit without printing enter **N** or **Q**.

Date: 03/05/2007 Time: 12:39:53		Demo Company Sales Analysis - (BY DEPTNO AND ITEM) Date Range: 01/01/2000 to 12/31/2005		Page No. 1			
DEPTNO	1	GASOLINE	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	SNL	SUPER UNLEADED	104192.34	241466.26	229842.47	11623.79	0.1116
ITEM	UNL	UNLEADED GASOLINE	1180599.35	2572495.01	2499482.09	73012.92	0.0618
Totals for		GASOLINE	1284791.70	2813961.27	2729324.56	84636.71	0.0659
DEPTNO	2	DIESEL	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	128176.60	272100.29	265150.23	6950.06	0.0542
Totals for		DIESEL	128176.60	272100.29	265150.23	6950.06	0.0542
Grand Totals			1412968.30	3086061.56	2994474.79	91586.77	0.0648

Report by Item (subtotals) and Department (grand totals) with profit per gallon

Date: 03/05/2007		Demo Company		Page No.			
Time: 12:43:30		Sales Analysis - (BY CUSTNO AND ITEM)				1	
Date Range: 01/01/2005 to 12/31/2005							
CUSTNO	KATCO	Katco Inc.	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	6925.00	14617.53	14442.47	175.06	0.0253
ITEM	SNL	SUPER UNLEADED	10618.00	23182.78	23242.59	-59.81	-0.0056
ITEM	UNL	UNLEADED GASOLINE	196540.00	414351.89	413620.28	731.61	0.0037
Totals for Katco Inc.			214083.00	452152.20	451305.34	846.86	0.0040
CUSTNO	LARCO	Larco Enterprises	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	4202.00	8661.24	8619.22	42.02	0.0100
ITEM	SNL	SUPER UNLEADED	19709.00	46025.01	45827.92	197.09	0.0100
ITEM	UNL	UNLEADED GASOLINE	200710.00	444316.99	442309.89	2007.10	0.0100
Totals for Larco Enterprises			224621.00	499003.24	496757.03	2246.21	0.0100
CUSTNO	NEWCO	Newco Limited	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	24200.00	51347.49	51161.68	185.81	0.0077
ITEM	SNL	SUPER UNLEADED	14063.00	33206.74	32995.79	210.95	0.0150
ITEM	UNL	UNLEADED GASOLINE	96312.00	212707.91	211263.23	1444.68	0.0150
Totals for Newco Limited			134575.00	297262.14	295420.70	1841.44	0.0137
CUSTNO	PM1	Petro-Market #1	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	7028.60	17225.82	11388.36	5837.46	0.8305
ITEM	SNL	SUPER UNLEADED	11322.34	29677.67	19040.72	10636.95	0.9395
ITEM	UNL	UNLEADED GASOLINE	83785.35	206517.43	144105.60	62411.83	0.7449
Totals for Petro-Market #1			102136.30	253420.92	174534.68	78886.24	0.7724
CUSTNO	PM2	Petro-Market #2	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	69322.00	145741.05	145008.79	732.26	0.0106
ITEM	SNL	SUPER UNLEADED	9671.00	22357.72	22212.63	145.09	0.0150
ITEM	UNL	UNLEADED GASOLINE	94651.00	205827.26	204407.49	1419.77	0.0150
Totals for Petro-Market #2			173644.00	373926.03	371628.91	2297.12	0.0132
CUSTNO	PM3	Petro-Market #3	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	8197.00	17274.96	17106.66	168.30	0.0205
ITEM	SNL	SUPER UNLEADED	17301.00	39396.32	39136.81	259.51	0.0150
ITEM	UNL	UNLEADED GASOLINE	176863.00	388109.27	385289.40	2819.87	0.0159
Totals for Petro-Market #3			202361.00	444780.55	441532.87	3247.68	0.0160
CUSTNO	PM4	Petro-Market #4	Units	Sales in Dollars	Cost of Sales	Profit Dollars	Profit Per Gal
ITEM	LSD	LOW SULPHUR DIESEL	8302.00	17232.20	17423.05	-190.85	-0.0230
ITEM	SNL	SUPER UNLEADED	21508.00	47620.02	47386.01	234.01	0.0109
ITEM	UNL	UNLEADED GASOLINE	331738.00	700664.26	698486.20	2178.06	0.0066
Totals for Petro-Market #4			361548.00	765516.48	763295.26	2221.22	0.0061
Grand Totals			1412968.30	3086061.56	2994474.79	91586.77	0.0648

Report by Item (subtotals) and Customer (grand totals) with profit per gallon