

Sales Reports

In Sales Reports view, user is able to generate general and analysis sales reports of customers and products. The user can generate and print the list of the sales reports based on the selected Criteria. The following are the available reports:-

Report Description	Explanations
Customer Analysis	
Customer Sales Summary	Shows the summary transacted for a given period of time grouped per customer
Customer Sales Margin Summary	Shows margin summary transacted for a given period of time grouped per customer
12 Months Customer Sales Summary	Shows monthly sales summary transacted for a given period of time grouped per customer
Customer Sales Fulfillment	Shows sales fulfillment transacted for a given period of time grouped per customer
Customer Sales – 2 Months Comparison	Shows sales details per customer transacted during 2 different months
Customer Sales – 2 Quarters Comparison	Shows sales details transacted during the different Quarter of the selected period
Open Sales Order by Customer	Shows Approved Sales orders that are not delivered
Product Analysis	
Product Sales Summary	Shows sales summary transacted for a given period of time grouped per product
Product Sales Margin Summary	Shows margin summary transacted for a given period of time grouped per product
Product Sales Details	Shows product sales details with full invoice details for a given period of time
12 Months Product Sales Summary	Shows monthly sales summary transacted for a given period of time grouped per product
Product Sales Fulfillment Summary	Shows sales fulfillment transacted for a given period of time grouped per product
Product Sales Fulfillment Details	Shows sales fulfillment details for a given period of time grouped per product
Product Sales Cost Summary Report	Shows the Product Sales Cost Summary with transport and duty costs for the selected period
Product Sales Cost Details Report	Shows the Details of Product Sales Cost with transport and duty costs for the selected period
Product Sales – 2 Months Comparison	Shows sales details transacted during 2 different months
Product Sales – 2 Quarters Comparison	Shows sales details transacted during 2 different Quarters of the selected period
Top % Mix & Highest Sales Charts	Shows Top % Mix & Highest Sales Charts
This Year vs Last Year Comparison Chart	Shows This Year vs Last Year Comparison Chart

Open Sales Order by Product	Shows Approved Sales Order that are not delivered
Open Sales Order Details	Shows Approved Sales Order that are not delivered
Sell Out Analysis	
Daily Sell Out Store Sales Summary	Shows daily sell out store sales summary with a given period of time
Store Product Movement	Shows store product movement
Store Product Sales Details	Shows store product sales details
General Reports	
Sales Documents Listing	Shows sales documents list transacted in a given period of time
Sales Documents Margin Report	Shows sales documents margin transacted in a given period of time
Monthly Sales Document Count Report	Shows 12 month sales documents count from the selected fiscal period
Sales Price List	Display Product Price details of all products under the given category, as defined in the sales price list
Trading Term Report	Shows Trading Term Report
Inactive Customers Report	Shows the inactive Customers for a period
Inactive Products Report	Shows the inactive Products for a period
Payment Term Changes Report	Shows payment term changes
Customer Credit Summary	Shows credit summary for a customer
Wholesale Margin Report	Shows Wholesale Margin Details
Cash On Delivery Report	Shows Cash On Delivery Report
Daily Sales Order On Hold Report	Shows Daily Sales Order On Hold Report
Customer Payment Receipt Detail Report	Show the details of receipts collected from the customers

Below actions are available under ***“Sales Reports”***:



View and search reports for Sales module

The screenshot shows the 'Reports Navigator' window. On the left, a tree view under 'Sales Module' has '12 Months Customer Sales Summary' selected. The central pane displays a list of reports, with '12 Months Customer Sales Summary' highlighted. The right pane, titled 'Report Parameters', shows configuration for the selected report. It includes a description: 'Shows monthly sales summary transacted for a given period of time grouped by customer.' Below this are several dropdown menus: 'Group By' (set to '< No Grouping >'), 'Branch' (set to '< Select All >'), 'Partner Group' (set to '< Select All >'), 'Representative' (set to '< Select All >'), 'Product Brand' (set to '< Select All >'), 'Market Category' (set to '< Select All >'), 'Product Group' (set to '< Select From All Groups >'), 'Product' (set to '< Select All Products >'), and 'Warehouse' (set to '< Select All Warehouses >'). There are also date pickers for 'From' (Year 2015) and 'To' (July 2015), a 'Show' dropdown (set to 'Value'), and a checked checkbox for 'Include Credit Note transactions'. A 'Generate Report' button is at the bottom.


View and Search Reports for Sales Module

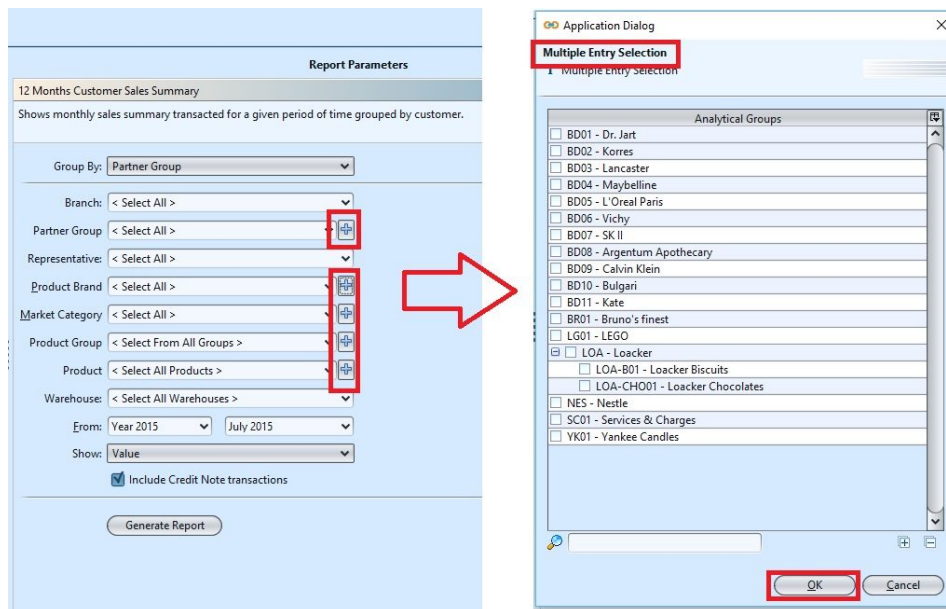
1. Enter search parameter to filter the result, i.e. type in the report name in the search textfield box at the top of the screen

This screenshot is similar to the first one but highlights the search functionality. A red circle with the text 'Search Engine' points to a button located next to the search textfield at the top of the report list. The '12 Months Customer Sales Summary' report remains selected in the list.

2. Select a report from the list of reports available

3. Select the parameters to filter the report, i.e. by specific "Product Brand", time period

4. Click  button next to drop-down list to select multiple items (i.e. certain product brands). On the pop-up window, tick the box(es) of items to be included in the report, then click **"OK"** button



5. Click **“Generate Report”** button at the bottom right of the screen to generate the report; it will open a new tab with the selected report

Report Parameters

12 Months Customer Sales Summary

Shows monthly sales summary transacted for a given period of time grouped by customer.

Group By: Partner Group

Branch: HQ - Head Office

Partner Group: PG01-02 - North West

Representative: < Select All >

Product Brand: BD09 - Calvin Klein

Market Category: CT01/0111 - Woman Bleach

Product Group: PG-001-02 - From 20 S\$ to 29 S\$

Product: 50 - Ctrl-A Sensitive Sun Protector 40ml

Warehouse: < Select All Warehouses >

From: Year 2015 July 2015

Show: Value

☒ Include Credit Note transactions

Generate Report

6. On the selected report tab, some records are clickable – in this case the mouse pointer will

