## 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

Report Categories	Search:			Report Parameters	
I Reports	Curtomer Saler Summany	12 Months Custon	mer Sales Summary		
HR Module	Customer sales summary	 			
Expense Claim Reports	Customer Sales Margin Summary	shows monthly sa	ales summary transacted for a given	period of time grouped by c	
Accounts Module					
Financial Reports	12 Months Customer Sales Summary				
Business Partner Reports		 Group By:	< No Grouping >	~	
A/c Receivable Reports	Customer Sales Fulfillment				
A/c Payable Reports		Branch:	< Select All >	~	
Analytical Group Reports	Customer Sales - 2 Months Comparison				
Cost Center Reports	Curtamor Salar 2 Quarters Comparison	Partner Group	< Select All >	✓ ⊕	
Comparison Reports	Customer sales - 2 Quarters Companison				
Group Financial Reports	Open Sales Order by Customer	Representative:	< Select All >	*	
Asset Reports	open sales order by customer	 Dead and Dead	C. Colort All a		
Budget Reports	Product Sales Summary	Product Brand	< Select All >	▼ 101	
Audit Reports		 Market Category	< Select All >		
Accounts Charts	Product Sales Margin Summary	market category	( Successive		
Sales Module		Product Group	< Select From All Groups >	<ul><li></li></ul>	
Customer Analysis	Product Sales Details				
Product Analysis		Product	< Select All Products >	4 中	
General Reports	12 Months Product Sales Summary				
Purchase Module	Deaduct Calco F. Willing and Commence	Warehouse:	< Select All Warehouses >	v	
Vendor Analysis	Froduct sales Fulliment Summary	From	Vear 2015	~	
Product Analysis	Product Sales Fulfillment Details		(Tear 2015 - ) (Suly 2015		
General Reports		 Show:	Value	¥	
Inventory Module	Product Sales Cost Summary Report		d		
General Reports			M Include Credit Note transaction	IS	
Analysis Reports	Product Sales Cost Details Report				
Supply Chain Module					
Sales Forecast	Product Sales - 2 Months Comparison		Generate Report		
Supply Forecast	Product Sales - 2 Quarters Comparison				
	Top % Mix & Highest Sales Charts				
	This Versus Last Vers Companies Chart				

## 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

Reports Navigator			
Report Categories	Search:		Report Parameters
All Reports	Customer Sales Summers	N	12 Months Customer Sales Summary
HR Module	Customer sales summary		
Expense Claim Reports	Customer Sales Margin Summary	Search Engine	Shows monthly sales summary transacted for a given period of time grouped by customer.
Accounts Module	customer sures margin summary	Comment and	
Financial Reports	12 Months Customer Sales Summary		
Business Partner Reports			Group By: < No Grouping >
A/c Receivable Reports	Customer Sales Fulfillment		
A/c Payable Reports			Durante of Calcut All S
Apphdical Group Paparts	Customer Sales - 2 Months Comparison		branch: K Select All X

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

		CO Application Dialog	×
	Report Parameters	Multiple Entry Selection	
12 Months Custor	mer Sales Summary		
Shows monthly sa	ales summary transacted for a given period of time grouped by customer.	Analytical Groups	<b>臣</b>
Group By:	Partner Group 🗸	BD02 - Korres BD03 - Lancaster BD04 - Mathelline	
Branch: Partner Group Representative:	< Select All >	B005 - L'Oreal Paris     B005 - L'Oreal Paris     B006 - Vichy     B007 - SK II     B008 - Argentum Apothecary     B009 - Calvin Klein	
Product Brand Market Category Product Group Product Warehouse:	< Select All > Iff < Select All > Iff < Select From All Groups > Iff < Select All Products > Iff < Select All Warehouses > V	BD10 - Bulgar     BD11 - Kate     BR01 - Bruno's finest     LG01 - LEGO     LG0 - LOacker     L0A - Loacker     L0A-801 - Loacker Biscuits     L0A-601 - Loacker Chocolates     NES - Nextle	
<u>F</u> rom: Show:	Year 2015     July 2015       Value     V       Include Credit Note transactions	SC01 - Services & Charges VK01 - Yankee Candles	
	Generate Report	Ø	E E

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 Custon	ner Sales Summary
Shows monthly sa	les 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 >
<u>P</u> roduct 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 V 다
Warehouse:	< Select All Warehouses >
<u>F</u> rom:	Year 2015 V July 2015 V
Show:	Value 🗸
	M Include Credit Note transactions
	Generate Report

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

change to a hand pointer  $\checkmark$  – it is possible to click on these hyperlink records to open another report for that particular record or show transaction details of the record (see pictures below for an example of sales reports' hyperlinks)

		Sa	mooha De	mo Distribut	ion Pte Ltd				
		Ci	ustomer - Gro	oss To Net Sal	es Summary				
From Date : 01-Jan-2016,	To Date : 31-Dec-2016 Currency :	SGD Branch : HQ - Head Off	ice Type : Base	Currency No. Of Pro	tucts : All				
Customer Custom	er Name	Sales Qty	Return Qty	Gross Sales	Sales Returns	Cust Discount	Inv Discount	Price Change	Net Inv Sale
4110.011/CO001 Cold Sta 4110.011/GU001 Guardia	orage - HQ	72	(1,659)	1,337.50	(1,774.12)	(109.23)	(24.81)	(285.60)	(831.4)
4110.011/ME001 Metro	-114	20	(6)	1,154.20	(334.10)	(545.2.1)	(24.01)	(24.00)	820.1
4110.011/MU001 Mustafa		Maure To Aposther Percent 2	1-1		(/	0.21			432.5
4110.011/SA001 Sasa - H	HQ.	Move to Another Report :				(2.98)	(10.00)		1.5
4110.011/SA002 Sasa - 0	Sateway	Clicking on hyper l	ink will take you to	an another report.Wo	uld you like to contin	(9.87) ue?			39.4
4110.011/SE002 7-11 - H	Q Descartment Store					(0.90)		3.00	17.2
4110.011/TA002 Takashi	mava		(Yes)			(10.04)		3.00	194.7
4110.011/WA001 Watson	s - HQ	124	(22)	5,043.82	(53.10)	(93.39)	(24.49)	(17.30)	4,855.5
PR-BGD Prime S	tores Bangladesh	643	(19)	35,881.64	(4,193.59)		2010	6.87	31,694.5
	Gr	and Total : 1,213	(1,719)	46,052.04	(6,371.23)	(575.41)	(59.30)	(317.71)	38,728.3
	/								
No. in the Columb									
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		Sa	imooha De	mo Distribut	ion Pte Ltd				
		F	Product - Gro	ss To Net Sale	s Summary				
From Date : 01-Jan-2016,	To Date : 31-Dec-2016 Currency :	SGD Branch : HQ - Head Off	ice Customer : 4	110.011/CO001 - Col	d Storage - HQ Typ	e : BaseCurrency	No. Of Documents :	AI	
Product Product	t Name	Sales Qty	Return Qty	Gross Sales	Sales Returns	Cust Discount	Inv Discount	Price Change	Net Inv Sale
BD01-003145 Ctrl-A B	eauty Balm 40ml	11		323.84		(32.34)		(291.50)	
BD01-003146 Black La	abel Nourishing Beauty Balm SPF 25 (5	50ml) 30		967.20		(96.60)			870.6
Loa01 Loacker	Chocolate	Move To Another Report ?			)	<			44.4
Loa02 Loacker	Vanilla ER MOCHA CHOCOLATE BAR 12 X 1							(1.01)	
Loa06 50GRAM	MS	Clicking on hyper link	will take you to an	another report.Would	l you like to continue	7		5.05	(626.2
Loa07 LOACKI 100GR/	ER DARK CHOCOLATE BAR 10 X 15 AMS		(Var)	No		9.00			(172.8
Loa10 LOACK	ER CHOCOLATE CHIP COOKIES 12		C TO	TÃO		10.71			(203.4
LOACKI	ER MINI DARK CHOCOLATE BITES 1	0 X 20 X	(802)		(745.86)			1.86	(744.0
25GRAJ	ws / or	rand Total : 72	(1.659)	1 337 50	(1 774 12)	(109.23)		(285.60)	(831.4
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Navigator 🍸 Product Sales	Details × Product Sales Summary	Customer Sales Summary	1						
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7. At the bottom of the report tab, the following options are available:

