

# *DAC*

## *User Guide*

### **Sales Analysis Reports**

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# Working With Sales Analysis Reports

The Sales Analysis Reports application (option 8 of the Reports screen) is used to print the following reports:

- Customer PTD/YTD Sales
- Company Profile
- Salesman Profile
- Customer Profit Analysis
- Customer Monthly Movement

The Work With Customer/Class Analysis application (option 7 of the Sales Analysis screen) is used to display weekly sales activity for a designated customer.

Refer to Working With Customer Reports of the Customer File Maintenance document for information about printing the Customer Weekly Movement, Customer Account Analysis and Monthly Cigarette Sales reports.

Refer to Working With Item Analysis Reports of the Item File Maintenance document for information about printing lists of the best selling and worst selling items, the No Sale Item List, the Vendor Weekly Movement report and the Item Sales List By Percentage report.

## Printing A Customer PTD/YTD Sales Report

The Customer PTD/YTD Sales report lists total sales, base cost and lost sales, and total number of invoices and credits of active customers for the current period and year.

This period to date report *must be printed before* using the End Of Period Processing application to close a period. To print the report based on an entire year of sales data, it *must be printed before* using the End Of Year Processing application to close the year.

1. Select option 6 (Reports Menu) from the Main Operations Menu screen. The Reports screen appears.

```
User: JEANNINE          Menu: RPCV1          Date: 1/23/08

===== > R E P O R T S < =====
=====
|||||||
THE  ||          1. Customer Reports
DAC  ||          2. Item Reports
SYSTEM ||        3. A/R Reports
|||||||          4. Billing Reports
|||              5. Inventory Reports
|||              6. Purchasing Reports
|||              7. Tax Reports
|||              8. Sales Analysis Reports
|||              9. Labels
|||              10. Order Books

                        M E N U   C A L L S
19. Credit Reports      20. Salesman Reports      21.
22.                    23. Dac Main Menu          90. Sign Off

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2. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JEANNINE          Menu: SARCV1          Date: 1/23/08

===== > S A L E S   A N A L Y S I S < =====
=====
||||||| 1. Customer Sales/Cost PTD & YTD  11. Cust Monthly Sales Report
THE  ||  2. WTD/YTD Company Profile        12. Cust Monthly Unit Sales
DAC  ||  3. DAILY/PTD Company Profile      13. Vendor Monthly Analysis
SYSTEM || 4. WTD/YTD Salesman Profile      14. Delivery Route Profitability
||||||| 5. DAILY/PTD Salesman Profile
|||      6. Customer Profitability
|||      7. Work with Customer/Class Analysis
|||      8. Customer/Category Sales by Date
|||      9. Customer Monthly Movement
|||     10. Customer Ranking Report

                        M E N U   C A L L S
19.                    20.                    21. Reports
22.                    23. Dac Main Menu        90. Sign Off

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3. Select option 1 (Customer Sales/Cost PTD & YTD) from the Sales Analysis screen. The Customer PTD/YTD Sales report is spooled for printing without any additional prompts.

## Customer PTD/YTD Sales

Creative Data Research, Inc.		Customer PTD/YTD Sales		JEANNINE	DSYLPFR	12/31/07	8:18:33	Page	1
Customer Number	Customer Name	City	State	Zip	Zip-Ext	Last Pay Date	Last Order Date		
771230	B & D FOOD STORE	HOUSTON	TX	77061		12/28/07	11/29/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	50770.13	Base Cost YTD	48121.58	Invoices YTD	21 Credits YTD	0 Lost Sales YTD	79.79		
100801	BARON EXPRESS #2 BP	MANDEVILLE	LA	70472		12/28/07	12/28/07		
Sales PTD	6433.28	Base Cost PTD	5840.07	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	47457.02	Base Cost YTD	43536.68	Invoices YTD	25 Credits YTD	2 Lost Sales YTD	137.62		
320001	BIG P MINI MART	LONGBEACH	MS	39560		12/28/07	11/29/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	26315.34	Base Cost YTD	23945.02	Invoices YTD	18 Credits YTD	4 Lost Sales YTD	9.04		
100003	BOB'S SHELL	COVINGTON	LA	70433		12/28/07	12/28/07		
Sales PTD	3542.24	Base Cost PTD	3205.83	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	39629.56	Base Cost YTD	35947.03	Invoices YTD	23 Credits YTD	5 Lost Sales YTD	1396.53		
100802	CRANKY CORNER QUICK STOP	FOLSOM	LA	70444		12/28/07	12/28/07		
Sales PTD	5147.12	Base Cost PTD	4693.51	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	17882.97	Base Cost YTD	15647.32	Invoices YTD	18 Credits YTD	1 Lost Sales YTD	3085.74		
800237	DANNY & CLYDE'S FOOD STORE #20	COVINGTON	LA	70445		12/28/07	12/26/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	25174.81	Base Cost YTD	22823.91	Invoices YTD	14 Credits YTD	1 Lost Sales YTD	916.25		
100002	DIANNE'S GROCERY	COVINGTON	LA	70435		12/28/07	11/29/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	46159.01	Base Cost YTD	42493.84	Invoices YTD	25 Credits YTD	4 Lost Sales YTD	300.51		
100850	EXPRESS WAY FOOD MART	FOLSOM	LA	70555		12/28/07	12/28/07		
Sales PTD	4955.78	Base Cost PTD	4493.39	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	45954.75	Base Cost YTD	41874.87	Invoices YTD	19 Credits YTD	2 Lost Sales YTD	939.83		
100855	GAS-N-SHOP #6	ABITA SPRINGS	LA	70555		12/28/07	11/05/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	40480.93	Base Cost YTD	36573.90	Invoices YTD	18 Credits YTD	1 Lost Sales YTD	377.15		
100900	JR FOOD MART - ABITA	ABITA SPRINGS	LA	70541		12/28/07	11/09/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	50324.00	Base Cost YTD	46159.11	Invoices YTD	18 Credits YTD	5 Lost Sales YTD	.00		
100857	JR FOOD MART - FOLSOM	FOLSOM	LA	75151		12/28/07	12/26/07		
Sales PTD	6118.85	Base Cost PTD	5579.83	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	39042.73	Base Cost YTD	35160.91	Invoices YTD	13 Credits YTD	0 Lost Sales YTD	1020.10		
800333	KINGS FOREST EXXON	COVINGTON	LA	70433		12/28/07	9/21/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	22389.87	Base Cost YTD	20661.49	Invoices YTD	11 Credits YTD	0 Lost Sales YTD	516.80		
320033	KINGS GROCERY	BILOXI	MS	39350		12/28/07	11/29/07		
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00		
Sales YTD	51571.78	Base Cost YTD	46490.70	Invoices YTD	23 Credits YTD	0 Lost Sales YTD	702.08		

## Customer PTD/YTD Sales (continued)

Creative Data Research, Inc.			Customer PTD/YTD Sales			JEANNINE	DSYLPFR	12/31/07	8:18:33	Page	2
Customer Number	Customer Name	City	State	Zip	Zip-Ext	Last Pay Date	Last Order Date				
700180	L & M GROCERY	FOLSOM	LA	70666		12/28/07	12/28/07				
Sales PTD	3622.43	Base Cost PTD	3262.80	Invoices PTD	1 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	40213.96	Base Cost YTD	36566.24	Invoices YTD	14 Credits YTD	1 Lost Sales YTD					632.70
320092	LIL SHORT STOP - OCEAN SPRINGS	OCEAN SPRINGS	MS	39564		12/28/07	12/28/07				
Sales PTD	3636.55	Base Cost PTD	3313.64	Invoices PTD	1 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	59128.53	Base Cost YTD	53825.02	Invoices YTD	22 Credits YTD	0 Lost Sales YTD					266.63
320091	LIL SHORT STOP - VANCLEVE	VANCLEVE	MS	39565		12/28/07	12/28/07				
Sales PTD	6159.82	Base Cost PTD	5566.61	Invoices PTD	1 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	45814.49	Base Cost YTD	41492.78	Invoices YTD	15 Credits YTD	1 Lost Sales YTD					314.15
320055	OCEAN SPRINGS QUICK STOP	OCEAN SPRINGS	MS	39564		12/28/07	12/28/07				
Sales PTD	770.80	Base Cost PTD	676.72	Invoices PTD	1 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	45823.58	Base Cost YTD	41531.91	Invoices YTD	18 Credits YTD	0 Lost Sales YTD					.00
770060	PACKS FOOD STORE	HOUSTON	TX	77045		12/28/07	12/28/07				
Sales PTD	1935.85	Base Cost PTD	1632.51	Invoices PTD	2 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	47141.56	Base Cost YTD	43220.51	Invoices YTD	16 Credits YTD	2 Lost Sales YTD					354.57
770005	PARK IT MARKET	HOUSTON	TX	77056		12/28/07	12/28/07				
Sales PTD	1026.50	Base Cost PTD	986.00	Invoices PTD	1 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	45589.15	Base Cost YTD	42368.79	Invoices YTD	17 Credits YTD	1 Lost Sales YTD					77.40
300133	SAIA'S SUPERMARKET	FOLSOM	LA	70796		12/28/07	11/05/07				
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	19857.51	Base Cost YTD	17695.56	Invoices YTD	8 Credits YTD	0 Lost Sales YTD					.00
100004	SNYDER'S STOP & GO	MANDEVILLE	LA	70471		12/28/07	11/02/07				
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	36518.92	Base Cost YTD	32874.80	Invoices YTD	13 Credits YTD	0 Lost Sales YTD					875.97
100001	STOP 'N SHOP	COVINGTON	LA	70433		12/28/07	12/26/07				
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	46651.17	Base Cost YTD	41761.24	Invoices YTD	16 Credits YTD	0 Lost Sales YTD					1766.60
770031	TAYLOR'S MINI MART	HOUSTON	TX	77077		12/28/07	12/28/07				
Sales PTD	7329.41	Base Cost PTD	6706.28	Invoices PTD	2 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	55223.51	Base Cost YTD	50402.58	Invoices YTD	20 Credits YTD	0 Lost Sales YTD					1658.33
770001	TEXAS TRUCK STOP	HOUSTON	TX	77029		12/28/07	12/28/07				
Sales PTD	2422.80	Base Cost PTD	2328.30	Invoices PTD	2 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	68130.17	Base Cost YTD	62598.61	Invoices YTD	21 Credits YTD	0 Lost Sales YTD					1110.32
100301	THREE RIVERS CHEVRON	COVINGTON	LA	70471		12/28/07	12/28/07				
Sales PTD	111.71	Base Cost PTD	102.03	Invoices PTD	1 Credits PTD	0 Lost Sales PTD					.00
Sales YTD	23488.04	Base Cost YTD	21190.51	Invoices YTD	10 Credits YTD	1 Lost Sales YTD					73.24
Creative Data Research, Inc.			Customer PTD/YTD Sales			JEANNINE	DSYLPFR	12/31/07	8:18:33	Page	3

## Customer PTD/YTD Sales (continued)

Customer Number	Customer Name	City	State	Zip	Zip-Ext	Last Pay Date	Last Order Date
100222	TODD'S COUNTRY CORNER	COVINGTON	LA	70435		12/28/07	12/26/07
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	21678.49	Base Cost YTD	19530.83	Invoices YTD	12 Credits YTD	0 Lost Sales YTD	.00
500101	UNION GROVE GROCERY	COVINGTON	LA	70435		12/28/07	12/28/07
Sales PTD	3753.58	Base Cost PTD	3485.28	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	19335.81	Base Cost YTD	17743.05	Invoices YTD	10 Credits YTD	0 Lost Sales YTD	49.88
900200	USA CONVENIENCE STORE #200	METAIRIE	LA	70001	9999	12/28/07	10/19/07
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	23053.01	Base Cost YTD	22033.79	Invoices YTD	14 Credits YTD	4 Lost Sales YTD	478.45
900300	USA CONVENIENCE STORE #300	COVINGTON	LA	70433		12/28/07	10/19/07
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	13300.22	Base Cost YTD	12649.64	Invoices YTD	10 Credits YTD	1 Lost Sales YTD	468.50
900400	USA CONVENIENCE STORE #400	LACOMBE	LA	70445		12/28/07	11/02/07
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	11682.64	Base Cost YTD	11078.19	Invoices YTD	9 Credits YTD	2 Lost Sales YTD	.00
900500	USA CONVENIENCE STORE #500	COVINGTON	LA	70433		12/28/07	10/19/07
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	8025.21	Base Cost YTD	7603.25	Invoices YTD	7 Credits YTD	0 Lost Sales YTD	.00
900600	USA CONVENIENCE STORE #600	COVINGTON	LA	70477		12/28/07	10/22/07
Sales PTD	.00	Base Cost PTD	.00	Invoices PTD	0 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	6049.42	Base Cost YTD	5726.96	Invoices YTD	6 Credits YTD	1 Lost Sales YTD	.00
99000	99 MART PLUS	HOUSTON	TX	77036		12/28/07	12/28/07
Sales PTD	2379.29	Base Cost PTD	2050.42	Invoices PTD	1 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	16124.17	Base Cost YTD	14510.16	Invoices YTD	6 Credits YTD	0 Lost Sales YTD	128.14
** Final totals **							
Sales PTD	59346.01	Base Cost PTD	53923.22	Invoices PTD	19 Credits PTD	0 Lost Sales PTD	.00
Sales YTD	1155982.46	Base Cost YTD	1055840.78	Invoices YTD	510 Credits YTD	39 Lost Sales YTD	17736.32
** END OF REPORT **							

## Displaying Weekly Customer Sales

The Work With Customer/Class Analysis application is used to display total weekly sales activity, base costs and net costs for all the items of a designated sales class.

1. Select option 6 (Reports Menu) from the Main Operations Menu screen. The Reports screen appears.

```
User: JEANNINE          Menu: RPCV1          Date: 5/08/06

===== > R E P O R T S < =====
=====
||||||| 1. Customer Reports
THE  || 2. Item Reports
DAC  || 3. A/R Reports
SYSTEM || 4. Billing Reports
||||||| 5. Inventory Reports
||||||| 6. Purchasing Reports
||||||| 7. Tax Reports
||||||| 8. Sales Analysis Reports
||||||| 9. Labels
||||||| 10. Order Books

M E N U   C A L L S
19. Credit Reports      20. Salesman Reports      21.
22.                    23. Dac Main Menu        90. Sign Off

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2. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JEANNINE          Menu: SARCV1          Date: 5/08/06

===== > S A L E S   A N A L Y S I S < =====
=====
||||||| 1. Customer Sales/Cost PTD & YTD  11. Cust Monthly Sales Report
THE  || 2. WTD/YTD Company Profile        12. Cust Monthly Unit Sales
DAC  || 3. DAILY/PTD Company Profile      13. Vendor Monthly Analysis
SYSTEM || 4. WTD/YTD Salesman Profile    14. Delivery Route Profitability
||||||| 5. DAILY/PTD Salesman Profile
||||||| 6. Customer Profitability
||||||| 7. Work with Customer/Class Analysis
||||||| 8. Customer/Category Sales by Date
||||||| 9. Customer Monthly Movement
||||||| 10. Customer Ranking Report

M E N U   C A L L S
19.                    20.                    21. Reports
22.                    23. Dac Main Menu        90. Sign Off

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3. Select option 7 (Work With Customer/Class Analysis) from the Sales Analysis screen. The Work With Analysis File screen appears.



BSCIDFR	DISPLAY Creative Data Research	5/08/06 14:21:44
	Work With Analysis File	
Cust#	Salesman Class Whs Year	
Type options, press Enter.		
5=Display		
? Cust#	Customer Name	Slsman Class Cat. Whs Year
100035	ABC	050568 2 3 1 4
100035	ABC	050568 2 3 1 5
100035	ABC	050568 2 3 1 6
100035	ABC	050568 700 4 1 4
100035	ABC	050568 700 4 1 5
100035	ABC	050568 700 4 1 6
100035	ABC	050568 100 4 1 4
100035	ABC	050568 100 4 1 5
100035	ABC	050568 100 4 1 6
100035	ABC	050568 1 1 1 4
100035	ABC	050568 1 1 1 5
100035	ABC	050568 1 1 1 6
100035	ABC	050568 2 1 1 4 +

4. Press <Page Down> or use one or more of the restrictor fields at the top of the screen to locate the desired customer in the screen's list. If necessary, move the cursor to the following restrictor fields and press <F4> to locate the desired customer's sales analysis record:

- **Cust#** - to select a customer name from the Select Customer Master screen.
- **Salesman** - to select an employee code from the Select Employee Master screen.
- **Class** - to select a sales class number from the Select Sales Class Master screen.

BSCIDFR	DISPLAY Creative Data Research	5/08/06 14:21:56
	Work With Analysis File	
Cust#	Salesman Class Whs Year	
100815		1
Type options, press Enter.		
5=Display		
? Cust#	Customer Name	Slsman Class Cat. Whs Year
100815	CASEY'S STOP	02 1 1 1 4
100815	CASEY'S STOP	02 1 1 1 5
100815	CASEY'S STOP	02 1 1 1 6
100815	CASEY'S STOP	02 5 1 1 4
100815	CASEY'S STOP	02 5 1 1 5
100815	CASEY'S STOP	02 5 1 1 6
100815	CASEY'S STOP	02 10 1 1 4
100815	CASEY'S STOP	02 10 1 1 5
100815	CASEY'S STOP	02 10 1 1 6
100815	CASEY'S STOP	02 30 1 1 4
100815	CASEY'S STOP	02 30 1 1 5
100815	CASEY'S STOP	02 30 1 1 6

5. Enter 5 (Display) in the selection column next to the customer's number and press <Enter>. The Display Analysis Record Page 1 screen appears with sales activity.

BSCLD3R	DISPLAY Creative Data Research				5/08/06 14:22:50	
Display Analysis Record Page 1						
Customer Number	100815	CASEY'S STOP				
Account Rep. :	02	JAMES PATTON				
Sales Class :	1	FULL PRICE BRANDED CIGARETTES			Category:	1
Warehouse Code	1	MAIN WAREHOUSE			Year	1
Sales 1 - 13		Sales 14 - 26		Sales 27 - 39		Sales 40 - 52
1.	505.20	14.	.00	27.	.00	.00
2.	664.25	15.	.00	28.	.00	.00
3.	692.35	16.	.00	29.	.00	.00
4.	734.95	17.	.00	30.	.00	.00
5.	950.90	18.	.00	31.	.00	.00
6.	436.90	19.	.00	32.	.00	.00
7.	668.20	20.	.00	33.	.00	.00
8.	886.65	21.	.00	34.	.00	.00
9.	.00	22.	.00	35.	.00	.00
10.	.00	23.	.00	36.	.00	.00
11.	.00	24.	.00	37.	.00	.00
12.	.00	25.	.00	38.	.00	.00
13.	.00	26.	.00	39.	.00	.00
F3=Exit		F12=Key screen				

6. Press <Page Down>. The Display Analysis Record Page 2 screen appears with base costs.

BSCLD3R	DISPLAY Creative Data Research		5/08/06 14:22:50	
Display Analysis Record Page 2				
Customer Number	100815	CASEY'S STOP		
Account Rep. :	02	JAMES PATTON		
Sales Class :	1	FULL PRICE BRANDED CIGARETTES		Category: 1
Warehouse :	1	MAIN WAREHOUSE		Year 1
Base Cost 1 - 13	Base Cost 14 - 26	Base Cost 27 - 39	Base Cost 40 - 52	
1. 477.75	14. .00	27. .00	40. .00	
2. 627.15	15. .00	28. .00	41. .00	
3. 653.85	16. .00	29. .00	42. .00	
4. 693.65	17. .00	30. .00	43. .00	
5. 899.10	18. .00	31. .00	44. .00	
6. 413.10	19. .00	32. .00	45. .00	
7. 631.80	20. .00	33. .00	46. .00	
8. 838.35	21. .00	34. .00	47. .00	
9. .00	22. .00	35. .00	48. .00	
10. .00	23. .00	36. .00	49. .00	
11. .00	24. .00	37. .00	50. .00	
12. .00	25. .00	38. .00	51. .00	
13. .00	26. .00	39. .00	52. .00	
F3=Exit F12=Key screen				

7. Press <Page Down>. The Display Analysis Record Page 3 screen appears with net costs.

BSCLD3R	DISPLAY Creative Data Research			5/08/06 14:22:50	
Display Analysis Record Page 3					
Customer Number	100815	CASEY'S STOP			
Account Rep. :	02	JAMES PATTON			
Sales Class :	1	FULL PRICE BRANDED CIGARETTES			Category: 1
Warehouse :	1	MAIN WAREHOUSE			Year 1
Net Cost 1 - 13	Net Cost 14 - 26	Net Cost 27 - 39	Net Cost 40 - 52		
1. 378.82	14. .00	27. .00	40. .00		
2. 481.41	15. .00	28. .00	41. .00		
3. 512.91	16. .00	29. .00	42. .00		
4. 541.20	17. .00	30. .00	43. .00		
5. 707.94	18. .00	31. .00	44. .00		
6. 326.25	19. .00	32. .00	45. .00		
7. 498.94	20. .00	33. .00	46. .00		
8. 659.92	21. .00	34. .00	47. .00		
9. .00	22. .00	35. .00	48. .00		
10. .00	23. .00	36. .00	49. .00		
11. .00	24. .00	37. .00	50. .00		
12. .00	25. .00	38. .00	51. .00		
13. .00	26. .00	39. .00	52. .00		
F3=Exit F12=Key screen					

8. Press <F3> to exit. The Work With Analysis File screen appears.

9. Press <F3> to exit. The Sales Analysis screen appears.

## Printing Company Profile Reports

The WTD/YTD Company Profile application is used to list week to date and year to date category sales, costs, profit margins, profit percentages, percentage of total sales, and percentage of total profit.

The Daily/PTD Company Profile application is used to list daily and period to date category sales, costs, profit margins, profit percentages, percentage of total sales, and percentage of total profit.

1. Select option 6 (Reports Menu) from the Main Operations Menu screen. The Reports screen appears.

```
User: JTIPPIN           Menu: RPCV1           Date: 9/12/01

===== > R E P O R T S < =====
|||||
THE  ||
DAC CV1||
SYSTEM ||
|||||
1. Customer Reports
2. Item Reports
3. A/R Reports
4. Billing Reports
5. Inventory Reports
6. Purchasing Reports
7. Tax Reports
8. Sales Analysis Reports
9. Labels
10. Order Books

M E N U   C A L L S
19. Credit Reports    20. Salesman Reports    21.
22.                  23. Dac Main Menu    90. Sign Off

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```

2. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JTIPPIN           Menu: SARCV1           Date: 9/12/01

===== > S A L E S   A N A L Y S I S < =====
|||||
THE  ||
DAC CV1||
SYSTEM ||
|||||
1. Customer Sales/Cost PTD & YTD
2. WTD/YTD Company Profile
3. DAILY/PTD Company Profile
4. WTD/YTD Salesman Profile
5. DAILY/PTD Salesman Profile
6. Customer Profitability
7. Work with Customer/Class Analysis
8. Customer/Category Sales by Date
9. Customer Monthly Movement

M E N U   C A L L
19          20          21 Reports
22          23. Dac Main Men    90. Sign Of

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```

## Week To Date and Year To Date Company Profile Report

1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```

User: JTIPPIN                      Menu: SARCV1                      Date: 9/12/01

===== > S A L E S   A N A L Y S I S < =====
=====
|||||||      1. Customer Sales/Cost PTD & YTD
THE  ||      2. WTD/YTD Company Profile
DAC CV1||    3. DAILY/PTD Company Profile
SYSTEM ||    4. WTD/YTD Salesman Profile
|||||||      5. DAILY/PTD Salesman Profile
|||          6. Customer Profitability
|||          7. Work with Customer/Class Analysis
|||          8. Customer/Category Sales by Date
|||          9. Customer Monthly Movement

                                M E N U   C A L L
19                                20                                21 Reports
22                                23. Dac Main Men                    90. Sign Of

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```

2. Select option 2 (WTD/YTD Company Profile) from the Sales Analysis screen.

## Company Profile Report (Week To Date and Year To Date)

Creative Data Research		Company Profile Report-W		JTIPPIN	DSXNPFPR	9/12/01 10:56:13	Page 1
Cat. No.	Description Name	WEEK TO DATE					
		Sales	Cost	Margin	Pct.	%TS	%TP
1	CIGARETTES	1873.86	1734.55	139.31	7.43	62.41	44.09
2	TOBACCO/SNUFF/CIGARS	119.90	107.62	12.28	10.24	3.99	3.89
3	SNACK ITEMS	117.98	100.26	17.72	15.02	3.93	5.61
4	CANDY/GUM	42.20	36.87	5.33	12.63	1.41	1.69
6	GROCERY	848.52	707.19	141.33	16.66	28.26	44.73
Totals:		3002.46	2686.49	315.97	10.52		
Cat. No.	Description Name	YEAR TO DATE					
		Sales	Cost	Margin	Pct.	%TS	%TP
1	CIGARETTES	14618116.40	14046704.98	571411.42	3.91	72.42	54.81
2	TOBACCO/SNUFF/CIGARS	2287275.02	2178012.58	109262.44	4.78	11.33	10.48
3	SNACK ITEMS	312909.95	272022.39	40887.56	13.07	1.55	3.92
4	CANDY/GUM	928570.29	861411.08	67159.21	7.23	4.60	6.44
5	GENERAL MERCHANDISE	185935.47	158870.54	27064.93	14.56	.92	2.60
6	GROCERY	961494.62	872860.23	88634.39	9.22	4.76	8.50
7	DRUGS/HBC	342834.66	288519.85	54314.81	15.84	1.70	5.21
8	SPECIALTY ITEMS FOR OUTLETS	143237.99	123445.65	19792.34	13.82	.71	1.90
9	AUTO SUPPLIES	59927.19	45351.84	14575.35	24.32	.30	1.40
10	OIL AND LUBE ITEMS	57159.05	49238.29	7920.76	13.86	.28	.76
11	CLOSE OUT ITEMS & TAX STAMPS	103462.67	101535.99	1926.68	1.86	.51	.18
12	DELI ITEMS	99062.11	78238.79	20823.32	21.02	.49	2.00
14	STORE SUPPLIES	84904.56	65043.93	19860.63	23.39	.42	1.90
15	SNAPPLE	741.35	617.35	124.00	16.73	.00	.01
18	HAWAIIAN JULEP	102.00	84.50	17.50	17.16	.00	.00
20	TELXON & DEL. CHARGES	1402.50	144.36	1258.14	89.71	.01	.12
30	EXPORT ITEMS	2628.76CR	210.00CR	2418.76CR	92.01	.01	.23
Totals:		20184507.07	19141892.35	1042614.72	5.17		
** END OF REPORT **							

## Daily and Period To Date Company Profile Report

1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```

User: JTIPPIN          Menu: SARCV1          Date: 9/12/01

===== > S A L E S   A N A L Y S I S < =====
=====
|||||
THE      ||          1. Customer Sales/Cost PTD & YTD
DAC CV1 ||          2. WTD/YTD Company Profile
SYSTEM ||          3. DAILY/PTD Company Profile
|||||          4. WTD/YTD Salesman Profile
          5. DAILY/PTD Salesman Profile
          6. Customer Profitability
          7. Work with Customer/Class Analysis
          8. Customer/Category Sales by Date
          9. Customer Monthly Movement

          M E N U   C A L L

19              20              21 Reports
22              23. Dac Main Men      90. Sign Of

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```

2. Select option 3 (Daily/PTD Company Profile) from the Sales Analysis screen.

Refer to the DAC Closing Procedures document for information about printing the Daily Company Profile Report during end of day processing.

## Company Profile Report (Daily and Period To Date)

Creative Data Research		Company Profile Report-D		JTIPPIN	DSPIFFR	9/12/01 10:49:29	Page 1
Cat.	Description	-- TODAY --					
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP
1	CIGARETTES	1873.86	1734.55	139.31	7.43	62.41	44.09
2	TOBACCO/SNUFF/CIGARS	119.90	107.62	12.28	10.24	3.99	3.89
3	SNACK ITEMS	117.98	100.26	17.72	15.02	3.93	5.61
4	CANDY/GUM	42.20	36.87	5.33	12.63	1.41	1.69
6	GROCERY	848.52	707.19	141.33	16.66	28.26	44.73
Totals:		3002.46	2686.49	315.97	10.52		
Cat.	Description	-- PERIOD TO DATE --					
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP
1	CIGARETTES	6178.38	5378.05	800.33	12.95	41.65	36.54
2	TOBACCO/SNUFF/CIGARS	320.30	293.92	26.38	8.24	2.16	1.20
3	SNACK ITEMS	491.46	419.04	72.42	14.74	3.31	3.31
4	CANDY/GUM	2249.84	2083.17	166.67	7.41	15.17	7.61
5	GENERAL MERCHANDISE	617.85	597.30	20.55	3.33	4.17	.94
6	GROCERY	1627.38	1397.98	229.40	14.10	10.97	10.47
7	DRUGS/HBC	3263.93	2459.68	804.25	24.64	22.00	36.72
9	AUTO SUPPLIES	19.31	14.03	5.28	27.34	.13	.24
20	TELXON & DEL. CHARGES	65.00	.00	65.00	100.00	.44	2.97
Totals:		14833.45	12643.17	2190.28	14.77		
** END OF REPORT **							

## Printing Salesman Profile Reports

The WTD/YTD Salesman Profile application is used to list week to date and year to date category sales, costs, profit margins, profit percentages, percentage of total sales, percentage of total profit, commissions and promotion dollars.

The Daily/PTD Salesman Profile application is used to list daily and period to date category sales, costs, profit margins, profit percentages, percentage of total sales, percentage of total profit, commissions and promotions.

1. Select option 6 (Reports Menu) from the Main Operations Menu screen. The Reports screen appears.

```
User: JTIPPIN           Menu: RPCV1           Date: 9/12/01

===== > R E P O R T S <=====
=====
|||||||
THE    ||
DAC CV1||
SYSTEM ||
|||||||
1. Customer Reports
2. Item Reports
3. A/R Reports
4. Billing Reports
5. Inventory Reports
6. Purchasing Reports
7. Tax Reports
8. Sales Analysis Reports
9. Labels
10. Order Books

M E N U   C A L L S
19. Credit Reports    20. Salesman Reports    21.
22.                  23. Dac Main Menu    90. Sign Off

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```

2. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JTIPPIN           Menu: SARCV1           Date: 9/12/01

===== > S A L E S   A N A L Y S I S <=====
=====
|||||||
THE    ||
DAC CV1||
SYSTEM ||
|||||||
1. Customer Sales/Cost PTD & YTD
2. WTD/YTD Company Profile
3. DAILY/PTD Company Profile
4. WTD/YTD Salesman Profile
5. DAILY/PTD Salesman Profile
6. Customer Profitability
7. Work with Customer/Class Analysis
8. Customer/Category Sales by Date
9. Customer Monthly Movement

M E N U   C A L L
19          20          21 Reports
22          23. Dac Main Men    90. Sign Of

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```

## Week To Date and Year To Date Salesman Profile Report

1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```

User: JTIPPIN           Menu: SARCV1           Date: 9/12/01

===== > S A L E S   A N A L Y S I S < =====
=====
|||||||      1. Customer Sales/Cost PTD & YTD
THE      ||      2. WTD/YTD Company Profile
DAC CV1||      3. DAILY/PTD Company Profile
SYSTEM ||      4. WTD/YTD Salesman Profile
|||||||      5. DAILY/PTD Salesman Profile
|||||||      6. Customer Profitability
|||||||      7. Work with Customer/Class Analysis
|||||||      8. Customer/Category Sales by Date
|||||||      9. Customer Monthly Movement

                                M E N U   C A L L

19                                20                                21 Reports
22                                23. Dac Main Men                      90. Sign Of

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2. Select option 4 (WTD/YTD Salesman Profile) from the Sales Analysis screen.

## Salesman Profile Report (Week To Date and Year To Date)

Creative Data Research		Salesman Profile Report-W		JTIPPIN	DSXOPFR	9/12/01 10:56:08	Page	1
03 - RAYMOND WESTAVER								
		-----WEEK TO DATE-----						
Cat.	Description	Sales	Cost	Margin	Pct.	%TS	%TP	
No.	Name							
1	CIGARETTES	1814.18	1677.85	136.33	7.51	61.65	43.56	
2	TOBACCO/SNUFF/CIGARS	119.90	107.62	12.28	10.24	4.07	3.92	
3	SNACK ITEMS	117.98	100.26	17.72	15.02	4.01	5.66	
4	CANDY/GUM	42.20	36.87	5.33	12.63	1.43	1.70	
6	GROCERY	848.52	707.19	141.33	16.66	28.83	45.15	
	Totals:	2942.78	2629.79	312.99	10.64			
		-----YEAR TO DATE-----						
Cat.	Description	Sales	Cost	Margin	Pct.	%TS	%TP	
No.	Name							
1	CIGARETTES	163375.35	152079.38	11295.97	6.91	64.65	53.52	
2	TOBACCO/SNUFF/CIGARS	34645.34	31910.37	2734.97	7.89	13.71	12.96	
3	SNACK ITEMS	3643.95	3139.08	504.87	13.86	1.44	2.39	
4	CANDY/GUM	21764.55	19581.90	2182.65	10.03	8.61	10.34	
5	GENERAL MERCHANDISE	2738.13	2327.44	410.69	15.00	1.08	1.95	
6	GROCERY	16258.83	14431.21	1827.62	11.24	6.43	8.66	
7	DRUGS/HBC	5758.72	4603.26	1155.46	20.06	2.28	5.47	
8	SPECIALTY ITEMS FOR OUTLETS	250.70	211.22	39.48	15.75	.10	.19	
9	AUTO SUPPLIES	757.82	555.98	201.84	26.63	.30	.96	
10	OIL AND LUBE ITEMS	594.02	483.96	110.06	18.53	.24	.52	
11	CLOSE OUT ITEMS & TAX STAMPS	14.46CR	6.00CR	8.46CR	58.51	.01	.04	
12	DELI ITEMS	1828.94	1484.70	344.24	18.82	.72	1.63	
14	STORE SUPPLIES	1081.21	801.86	279.35	25.84	.43	1.32	
15	SNAPPLE	9.75	7.65	2.10	21.54	.00	.01	
20	TELXON & DEL. CHARGES	25.00	.00	25.00	100.00	.01	.12	
	Totals:	252717.85	231612.01	21105.84	8.35			
Commission WTD :		34.07	Promo Dollars WTD:	.00				
Commission YTD :		2560.03	Promo Dollars YTD:	167.60				

## Salesman Profile Report (Week To Date and Year To Date continued)

Creative Data Research		Salesman Profile Report-W		JTIPPIN	DSXOPFR	9/12/01 10:56:08	Page 2
06 - BUD CONNORS							
Cat.	Description	WEEK TO DATE					
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP
	Totals:	.00	.00	.00	.00		
Cat.	Description	YEAR TO DATE					
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP
1	CIGARETTES	1478174.83	1405553.27	72621.56	4.91	65.63	50.36
2	TOBACCO/SNUFF/CIGARS	309972.53	293972.32	16000.21	5.16	13.76	11.10
3	SNACK ITEMS	44464.53	38454.99	6009.54	13.52	1.97	4.17
4	CANDY/GUM	134898.00	124439.64	10458.36	7.75	5.99	7.25
5	GENERAL MERCHANDISE	25639.10	21774.83	3864.27	15.07	1.14	2.68
6	GROCERY	165204.01	148722.30	16481.71	9.98	7.33	11.43
7	DRUGS/HBC	54132.25	43963.59	10168.66	18.78	2.40	7.05
8	SPECIALTY ITEMS FOR OUTLETS	293.22	258.81	34.41	11.74	.01	.02
9	AUTO SUPPLIES	11149.61	8249.68	2899.93	26.01	.50	2.01
10	OIL AND LUBE ITEMS	6128.09	4968.42	1159.67	18.92	.27	.80
11	CLOSE OUT ITEMS & TAX STAMPS	534.67CR	20.40CR	514.27CR	96.18	.02	.36
12	DELI ITEMS	9930.48	8059.68	1870.80	18.84	.44	1.30
14	STORE SUPPLIES	12639.40	9560.74	3078.66	24.36	.56	2.14
15	SNAPPLE	139.10	113.30	25.80	18.55	.01	.02
20	TELXON & DEL. CHARGES	40.00	.08	39.92	99.80	.00	.03
	Totals:	2252270.48	2108071.25	144199.23	6.40		
Commission WTD :		.00	Promo Dollars WTD:	.00			
Commission YTD :		23306.55	Promo Dollars YTD:	593.25			



## Daily and Period To Date Salesman Profile Report

1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```

User: JTIPPIN           Menu: SARCV1           Date: 9/12/01

===== > S A L E S   A N A L Y S I S < =====
=====
|||||      1. Customer Sales/Cost PTD & YTD
THE      ||      2. WTD/YTD Company Profile
DAC CV1  ||      3. DAILY/PTD Company Profile
SYSTEM  ||      4. WTD/YTD Salesman Profile
|||||      5. DAILY/PTD Salesman Profile
|||||      6. Customer Profitability
|||||      7. Work with Customer/Class Analysis
|||||      8. Customer/Category Sales by Date
|||||      9. Customer Monthly Movement

                                M E N U   C A L L
19                                20                                21 Reports
22                                23. Dac Main Men                    90. Sign Of

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2. Select option 5 (Daily/PTD Salesman Profile) from the Sales Analysis screen. screen.

## Salesman Profile Report (Daily and Period To Date)

Creative Data Research-SUPPORT		Salesman Profile Report-D		JTIPPIN	DSOYPFR	8/17/99 15:59:37 Page		1
03 - RAYMOND WESTAVER								
Cat.	Description	TODAY						
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP	
Totals:		.00	.00	.00	.00			
Cat.	Description	PERIOD TO DATE						
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP	
1	CIGARETTES	416.47	379.56	36.91	8.86	67.36	47.39	
2	TOBACCO/SNUFF/CIGARS	68.04	62.10	5.94	8.73	11.01	7.63	
3	SNACK ITEMS	13.09	11.44	1.65	12.61	2.12	2.12	
4	CANDY/GUM	42.90	38.38	4.52	10.54	6.94	5.80	
6	GROCERY	52.60	45.16	7.44	14.14	8.51	9.55	
9	AUTO SUPPLIES	5.13	3.71	1.42	27.68	.83	1.82	
20	TELXON & DEL. CHARGES	20.00	.00	20.00	100.00	3.24	25.68	
Totals:		618.23	540.35	77.88	12.60			
Commission Today:		.00						
Commission PTD :		6.52	Promo Dollars PTD:	.00				

Creative Data Research-SUPPORT		Salesman Profile Report-D		JTIPPIN	DSOYPFR	8/17/99 15:59:37	Page	5
04 - LAWRENCE KELLER								
Cat.	Description	-----TODAY-----						
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP	
Totals:		.00	.00	.00	.00			
Cat.	Description	-----PERIOD TO DATE-----						
No.	Name	Sales	Cost	Margin	Pct.	%TS	%TP	
1	CIGARETTES	72.15	68.06	4.09	5.67	40.65	32.90	
2	TOBACCO/SNUFF/CIGARS	66.69	62.10	4.59	6.88	37.57	36.93	
4	CANDY/GUM	33.63	31.20	2.43	7.23	18.95	19.55	
9	AUTO SUPPLIES	5.03	3.71	1.32	26.24	2.83	10.62	
Totals:		177.50	165.07	12.43	7.00			
Commission Today:		.00						
Commission PTD :		2.00	Promo Dollars PTD:	.00				
** END OF REPORT **								

## Printing Customer Profitability Reports

The Customer Profitability application is used to generate a report of the distributor's profit amount and percentage for one or more customer accounts based on the calendar (not fiscal) year. Profit can be calculated using net cost or base cost, and the report displays the sales and cost amounts used calculate the profit.

```
User: JEANNINE          Menu: RPCV1          Date: 5/09/06

===== > R E P O R T S < =====
=====
||||||| 1. Customer Reports
THE  || 2. Item Reports
DAC  || 3. A/R Reports
SYSTEM || 4. Billing Reports
||||||| 5. Inventory Reports
||||||| 6. Purchasing Reports
||||||| 7. Tax Reports
||||||| 8. Sales Analysis Reports
||||||| 9. Labels
||||||| 10. Order Books

M E N U   C A L L S
19. Credit Reports  20. Salesman Reports  21.
22.                23. Dac Main Menu    90. Sign Off

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1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JEANNINE          Menu: SARCV1          Date: 5/09/06

===== > S A L E S   A N A L Y S I S < =====
=====
||||||| 1. Customer Sales/Cost PTD & YTD  11. Cust Monthly Sales Report
THE  || 2. WTD/YTD Company Profile        12. Cust Monthly Unit Sales
DAC  || 3. DAILY/PTD Company Profile      13. Vendor Monthly Analysis
SYSTEM || 4. WTD/YTD Salesman Profile     14. Delivery Route Profitability
||||||| 5. DAILY/PTD Salesman Profile
||||||| 6. Customer Profitability
||||||| 7. Work with Customer/Class Analysis
||||||| 8. Customer/Category Sales by Date
||||||| 9. Customer Monthly Movement
||||||| 10. Customer Ranking Report

M E N U   C A L L S
19.                20.                21. Reports
22.                23. Dac Main Menu    90. Sign Off

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2. Select option 6 (Customer Profitability) from the Sales Analysis screen. The Customer Profitability Report screen appears.

GSR9PVR	ENTER	Creative Data Research	5/09/06	8:24:53
Customer Profitability Report				
Enter Only 1 Selection Criteria:				
Customer Number	. . . .			
Corporate number	. . . .			
Route	. . . . .			
Marketing Rep	. . . . .			
Sales Group	. . . . .			
Billing Matrix	. . . . .			
From week	of year	to week	of year	
Breakdown Option 1 (1=Category, 2=Class, 3=Invoice)				
Cost Type B B=Base Cost; N=Net Cost				
Version 1 (1 or 2) {Version 1 Has Qty, Version 2 Has Last Year Data}				
F3=Exit	F4=Search	F6=Print		

3. Enter data for one of the following fields:
  - **Customer Number** (6,n) - a customer number limits the report to an individual customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
  - **Corporate Number** (6,n) - a corporate number limits the report to a corporate customer. If necessary, press <F4> to select a number from the Select Corporate Master screen.
  - **Route** (6,a) - a route code limits the report to a group of customers of a sales route. If necessary, press <F4> to select a route code from the Select Route Description screen.
  - **Marketing Rep** (6,a) - an employee code of a sales representative limits the report to the group of customers of the marketing rep. If necessary, press <F4> to select an employee code from the Select Employee Master screen.
  - **Sales Group** (6,a) - a sales group code limits the report to the customers of a sales group. If necessary, press <F4> to select a sales group code from the Select Sales Group Master screen.
  - **Billing Matrix Number** (6,n) - a billing matrix number limits the report to a the customers of a billing matrix. If necessary, press <F4> to select a number from the Select Billing Matrix screen.
  
4. Enter data for the following fields:
  - **From week** (2,n) and **of year** (4,n) - a week and year, such as *14* and *2005*, to designate the starting date of the report.
  - **To week** (2,n) and **of year** (4,n) - a week and year, such as *26* and *2005*, to designate the ending date of the report.

The starting and ending dates must fall within the same year if 2 is entered for the **Version** field (see below) to include the previous year's data in the report.
  
5. Enter one of the following values for the **Breakdown Option** (1,n) field to designate the report's level of detail:
  - *1* - category
  - *2* - class
  - *3* - invoice.

6. Enter one of the following values for the **Cost Type** (1,a) field to designate the cost used for calculating profit for the report:
  - *B* - base cost
  - *N* - net cost.
7. Enter one of the following values for the **Version** (1,n) field to designate other data that can be included in the report if *1* (category) or *2* (class) is entered for the **Breakdown Option** field (see above) to designate the report's level of detail:
  - *1* - the quantities sold appears in the *Qty Shipments* column of the report.
  - *2* - the profitability data for the previous year appears under the *LAST YEAR* heading of the report. The starting and ending dates must fall within the same year (see the date fields above) to include the previous year's data in the report.
8. Press <F6> (Print) when data entry is complete.
9. Press <Enter> when prompted to confirm.
10. Press <F3> to exit. The Sales Analysis screen appears.

**Sales Analysis Reports (Rev. 8/01/12)**21

# Customer Profit Analysis - Version 2

Creative Data Research, Inc.      Customer Profit Analysis (Net Cost)JEANNINE    DCCUPFR    2/21/08 12:46:07 Page    1

From week   1 of year 2008 to week 52 of year 2008    Selection: 010022    TODD'S COUNTRY CORNER

A/R Balance    20318.03

Terms Code    020 2% 10 NET 30

Salesman    10    SAM CARRINGTON

Start Date    1/31/07

Customer 100222 TODD'S COUNTRY CORNER

79056 HWY 40

COVINGTON    LA    70435

\*\*\*\*\* L A S T   Y E A R   \*\*\*\*\*

	Sales	Net Cost	Profit	Profit%	Sales	Net Cost	Profit	Profit %
Cat. 1 CIGARETTES	7,017.46	6,619.93	397.53	5.66	13,031.11	12,235.21	795.90	6.11
Cat. 2 TORACCO	229.44	187.52	41.92	18.27	473.44	386.84	86.60	18.29
Cat. 4 CANDY/GUM	5,679.22	4,488.67	1,190.55	20.96	4,120.28	3,244.45	875.83	21.26
Cat. 5 GROCERY	1,027.85	904.83	123.02	11.97	1,496.37	1,342.46	153.91	10.29
Cat. 9 LIGHTERS	680.99	494.97	186.02	27.32	884.93	645.09	239.84	27.10
Cat. 10 MISC	.00	.00	.00	.00	10.00	.00	10.00	100.00
	14,634.96	12,695.92	1,939.04	13.25	20,016.13	17,854.05	2,162.08	10.80
Salesman Employee Number 10	14,634.96	12,695.92	1,939.04	13.25	20,016.13	17,854.05	2,162.08	10.80
Final totals	14,634.96	12,695.92	1,939.04	13.24	20,016.13	17,854.05	2,162.08	10.80

\*\* END OF REPORT \*\*

## Printing A Customer Sales By Date Range Report

The Customer Sales By Date Range report details the total sales to specific customers for a given date range. It displays total sales amounts and total units sold by category, with totals per customer, and category totals at the end of the report. Users have the option of printing this report for an individual customer, for all customers, or the customers of a single sales representative or billing matrix.

The Customer Sales By Date Range report (CVQYPFR\$) is based on the data contained in the Order Detail History file (ODHIST) of the DACDATA library.

```
User: JEANNINE          Menu: RPCV1          Date: 5/14/08

===== > R E P O R T S <=====
|||||||
THE  || 1. Customer Reports
DAC  || 2. Item Reports
SYSTEM || 3. A/R Reports
||||||| 4. Billing Reports
      5. Inventory Reports
      6. Purchasing Reports
      7. Tax Reports
      8. Sales Analysis Reports
      9. Labels
     10. Order Books

      M E N U   C A L L S
19. Credit Reports      20. Salesman Reports      21.
22.                    23. Dac Main Menu          90. Sign Off

=====
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```

1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JEANNINE          Menu: SARCV1          Date: 5/14/08

===== > S A L E S   A N A L Y S I S <=====
||||||| 1. Customer Sales/Cost PTD & YTD  11. Cust Monthly Sales Report
THE  || 2. WTD/YTD Company Profile        12. Cust Monthly Unit Sales
DAC  || 3. DAILY/PTD Company Profile      13. Vendor Monthly Analysis
SYSTEM || 4. WTD/YTD Salesman Profile    14. Delivery Route Profitability
||||||| 5. DAILY/PTD Salesman Profile
      6. Customer Profitability
      7. Work with Customer/Class Analysis
      8. Customer/Category Sales by Date
      9. Customer Monthly Movement
     10. Customer Ranking Report

      M E N U   C A L L S
19.                    20.                    21. Reports
22.                    23. Dac Main Menu      90. Sign Off

=====
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```

2. Select option 8 (Customer/Category Sales by Date) from the Sales Analysis screen. The Customer Sales By Date Selection screen appears.

CVQYPVR	ENTER	Creative Data Research, Inc.	5/14/08 14:11:59
Customer Sales by Date Selection			
Type choices, press Enter.			
From Date .			
Through Date			
Customer #		(Optional)	
Salesman .		(Optional)	
Billing Matrix		(Optional)	
Job Queue BOOK			
F3=Exit	F4=Search	F6=Submit Print	

3. Enter the range of invoice posting dates for the **From Date** and **Through Date** (6,n) fields to limit the sales data included in the report. If the date range entered crosses two years, such as 12/01/07 through 02/29/08, the current year to date sales data is also included in the report.
4. Enter data for the following fields:
  - Optional: **Customer #** (6,n) - a customer number limits the report to an individual customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
  - Optional: **Salesman** (6,a) - an employee code of a sales representative limits the report to the group of customers of the marketing rep. If necessary, press <F4> to select an employee code from the Select Employee Master screen.
  - Optional: **Billing Matrix** (6,n) - a billing matrix number limits the report to a the customers of a billing matrix. If necessary, press <F4> to select a number from the Select Billing Matrix screen.
5. If necessary, enter another job queue for the **Job Queue** (10,a) field.
6. Press <F6> (Submit Print) when data entry is complete.
7. Press <Enter> when prompted to confirm.
8. Press <F3> to exit. The Sales Analysis screen appears.



## Customer Sales By Date Range

Creative Data Research, Inc.		Customer Sales by Date Range		JEANNINE	CVPZPFR	5/19/08 14:18:21 Page		1
Activity From 12/01/07 - 2/29/08								
Cust #	Name	Sales Dollars	Units	YTD \$Dollars	YTD Units			
771230 B & D FOOD STORE								
1	CIGARETTES	4,443.78	113	44,230.11	1149			
2	TOBACCO	98.34	6	1,745.88	105			
4	CANDY/GUM	1,508.46	34	6,557.97	171			
5	GROCERY	201.94	33	1,714.85	194			
9	LIGHTERS	282.04	32	2,193.46	267			
10	MISC	.00		90.00	8			
Customer Total 771230		6,534.56	218	56,532.27	1894			
100801 BARON EXPRESS #2 BP								
1	CIGARETTES	12,906.42	438	44,250.01	1188			
2	TOBACCO	337.10	23	1,806.84	126			
4	CANDY/GUM	7,491.66	152	11,829.22	260			
5	GROCERY	2,101.45	209	3,300.71	328			
9	LIGHTERS	1,313.85	165	3,117.04	381			
10	MISC	.00		130.00	11			
Customer Total 100801		24,150.48	987	64,433.82	2294			
320001 BIG P MINI MART								
1	CIGARETTES	10,008.31	368	28,063.23	1042			
2	TOBACCO	166.20	12	2,399.20	158			
4	CANDY/GUM	9,078.42	192	11,789.76	263			
5	GROCERY	1,569.85	162	3,474.96	340			
9	LIGHTERS	1,496.61	179	2,597.78	309			
10	MISC	.00		30.00	6			
Customer Total 320001		22,319.39	913	48,354.93	2118			
100003 BOB'S SHELL								
1	CIGARETTES	10,251.94	349	35,367.01	1238			
2	TOBACCO	358.72	24	1,879.64	126			
4	CANDY/GUM	7,132.34	152	12,266.24	275			
5	GROCERY	1,228.10	126	2,907.59	290			
9	LIGHTERS	1,012.21	123	2,982.67	334			
10	MISC	.00		340.00	26			
Customer Total 100003		19,983.31	774	55,743.15	2289			
100802 CRANKY CORNER QUICK STOP								
1	CIGARETTES	5,201.28	170	10,014.19	338			
2	TOBACCO	172.08	12	336.66	25			
4	CANDY/GUM	2,334.08	52	8,480.16	180			
5	GROCERY	537.30	54	904.87	91			
9	LIGHTERS	207.10	25	472.01	57			
10	MISC	.00		10.00	6			
Customer Total 100802		8,451.84	313	20,217.89	697			

## Printing Customer Monthly Movement Reports

The Customer Monthly Movement application is used to detail the sales activity of an individual customer or a corporate customer for one or more months within a year.

```
User: JEANNINE          Menu: RPCV1          Date: 5/12/06

===== > R E P O R T S <=====
=====
||||||| 1. Customer Reports
THE  || 2. Item Reports
DAC  || 3. A/R Reports
SYSTEM || 4. Billing Reports
||||||| 5. Inventory Reports
||||||| 6. Purchasing Reports
||||||| 7. Tax Reports
||||||| 8. Sales Analysis Reports
||||||| 9. Labels
||||||| 10. Order Books

                                M E N U   C A L L S
19. Credit Reports              20. Salesman Reports          21.
22.                             23. Dac Main Menu             90. Sign Off

=====
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```

1. Select option 8 (Sales Analysis Reports) from the Reports screen. The Sales Analysis screen appears.

```
User: JEANNINE          Menu: SARCV1          Date: 5/12/06

===== > S A L E S   A N A L Y S I S <=====
=====
||||||| 1. Customer Sales/Cost PTD & YTD  11. Cust Monthly Sales Report
THE  || 2. WTD/YTD Company Profile         12. Cust Monthly Unit Sales
DAC  || 3. DAILY/PTD Company Profile       13. Vendor Monthly Analysis
SYSTEM || 4. WTD/YTD Salesman Profile     14. Delivery Route Profitability
||||||| 5. DAILY/PTD Salesman Profile
||||||| 6. Customer Profitability
||||||| 7. Work with Customer/Class Analysis
||||||| 8. Customer/Category Sales by Date
||||||| 9. Customer Monthly Movement
||||||| 10. Customer Ranking Report

                                M E N U   C A L L S
19.                             20.                             21. Reports
22.                             23. Dac Main Menu             90. Sign Off

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```

2. Select option 9 (Customer Monthly Movement) from the Sales Analysis screen. The Customer Monthly Movement screen appears.

CVVWPVR	ENTER	Creative Data Research	5/12/06	9:29:59
Customer Monthly Movement				
Type choices, press Enter.				
Year (20xx)		2006		
Period (1-12)				
Corporate Number				
** OR **				
Customer Number				
F3=Exit F4=Search F6=Print				

3. Enter data for the following fields:
  - **Year** (4,n) - the year in which the sales activity occurred.
  - **Period** (2,n) - the last month of the year for which the sales activity appears in the report. For example, if *11* is entered, sales activity for January through November will appear in the report.
4. Enter data for one of the following fields:
  - **Corporate Number** (6,n) - a corporate number limits the report to a corporate customer. If necessary, press <F4> to select a number from the Select Corporate Master screen.
  - **Customer Number** (6,n) - a customer number limits the report to an individual customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
5. Press <F6> (Print) when data entry is complete.
6. Press <Enter> when prompted to confirm.
7. Press <F3> to exit. The Sales Analysis screen appears.

# Customer Monthly Movement Report

Creative Data Research			Customer Monthly Movement			CDR1	CVWVFFR	9/19/02 16:02:49 Page 37			U S A G E P E R P E R I O D					*****				
Item Number	Description	Sell U/M Retail Unit Pft % Avg. Usage	01	02	03			04	05	06	07	08	09	10	11	12				
Corporate # 711000 7-ELEVEN																				
Period 8 2002																				
Total 1312 MISCELLANEOUS SANDWICHES			18	12920	10395	9563	10367	12839	15117	14053	15513	15504	0	0	0	0	0			
800910	BAR-S SLICED BACON 24/12 OZ.	24 CSE 31.89	57	54	58	53	55	50	60	67	0	0	0	0	0	0	0			
808378	O/M LUNCHABLE HAM&SWISS 16/4.5 OZ.	16 CSE 25.64	230	208	238	240	287	219	222	242	0	219	0	232	0	0	0			
808402	O/M LUNCHABLE TKY/CHEDDAR 16/4.5 OZ	16 CSE 25.66	297	248	283	321	372	285	319	306	0	319	0	306	0	0	0			
809723	O/M ALL MEAT BOLOGNA 12/8 OZ.	12 CSE 34.94	36	28	36	31	47	37	39	36	0	37	0	36	0	0	0			
809730	O/M BEEF BOLOGNA 12/8 OZ.	12 CSE 27.44	30	25	26	25	36	34	41	30	0	34	0	41	0	30	0			
809947	O/M SLICED CHOPPED HAM 12/8 OZ.	12 CSE 37.24	41	31	53	35	48	38	46	39	0	46	0	39	0	40	0			
809970	O/M SLICED COTTO SALAMI 12/8 OZ.	12 CSE 24.56	35	26	31	32	36	37	35	40	0	37	0	40	0	40	0			
809988	O/M SMOKED COOKED HAM 15/6 OZ.	15 CSE 34.77	47	36	41	47	48	58	46	53	0	46	0	48	0	46	0			
810700	DECKER MEAT BOLOGNA 24/12OZ.	24 CSE .00	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0			
810990	BAR-S MEAT BOLOGNA 16/12 OZ.	16 CSE 38.07	50	46	47	46	45	56	39	58	0	39	0	59	0	0	0			
811307	BAR-S JUMBO MEAT FRANKS 12/1#	12 CSE 32.90	115	99	106	112	105	125	129	124	0	124	0	123	0	0	0			
816680	BUDDIG SLICED BEEF 24/2.5 OZ. BAGS	24 BOX 36.71	29	37	22	18	19	41	18	27	0	18	0	46	0	0	0			
816682	BUDDIG SLICED CHICKEN 24/2.5OZBAGS	24 BOX 36.68	32	32	22	25	27	44	24	35	0	24	0	47	0	0	0			
816684	BUDDIG SLICED HAM 24/2.5 OZ. BAGS	24 BOX 36.70	32	33	25	26	24	42	31	32	0	31	0	45	0	0	0			
816686	BUDDIG SLICED TURKEY 24/2.5OZ BAGS	24 BOX 36.64	33	29	27	27	21	47	30	34	0	30	0	47	0	0	0			
816688	BUDDIG SLI OV/RST TURKEY 24/2.5OZ	24 BOX 36.71	30	25	26	23	24	46	23	33	0	23	0	40	0	40	0			
865058	SCHWAB'S SMOKED HOT LINKS 10/12 OZ.	10 CSE 28.28	139	162	139	133	131	158	115	135	0	131	0	136	0	0	0			
Total 1320 LUNCH MEAT * RETAIL PACKS			17	1233	1119	1096	1165	1499	1153	1298	1341	0	0	0	0	0	0			
602710	PINATA CORN TORTILLAS 6.5" 12/9OZ.	12 CSE .00	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0			
602715	PINATA FLOUR TORTILLAS 8" 12/12.5OZ	12 CSE .00	0	1	0	2	0	0	0	0	0	0	0	0	0	0	0			
608463	P/B BIG CNTRY BM BISC 12/10CT 85370	12 CSE 40.25	77	75	68	92	55	71	55	100	0	100	0	100	0	0	0			
Total 1325 BISCUITS/TORTILLAS			3	77	77	68	95	71	55	100	100	0	0	0	0	0	0			
600627	KR PARKAY OLEO QUARTERS 30/1LB	30 CSE 41.14	16	13	17	17	15	15	12	19	16	0	0	0	0	0	0			
600690	SHEDD'S MINI CROCK 18/2-8 OZ.	18 CSE 37.17	57	59	56	53	56	61	52	65	55	0	0	55	0	0	0			
603423	KRAFT FRENCH ONION DIP 12/8 OZ.	12 CSE 40.25	51	49	47	51	46	61	52	51	50	0	0	51	0	0	0			
604074	KRAFT CHEEZ WHIZ 12/15 OZ.	12 CSE 34.17	9	8	7	7	9	9	10	13	8	0	0	13	0	0	0			
604210	KRAFT PHIL CREAM CHEESE 6/3 OZ.	6 BOX 33.96	64	56	33	64	80	73	88	70	49	0	0	88	0	0	0			
604350	PHILLY STRAW/CHEESECAKE BAR 6/1.5OZ	6 BOX 35.99	354	0	0	409	480	583	399	503	454	0	0	454	0	0	0			
604355	PHILLY CLSC CHEESECAKE BAR 6/1.5OZ.	6 BOX 35.99	272	0	0	422	378	415	282	341	338	0	0	341	0	338	0			
604365	PHILLY WHITE-CHOC RASP BAR 6/1.5OZ.	6 BOX 35.99	266	0	0	410	379	396	271	338	333	0	0	338	0	333	0			
904384	PHILLY SNACK BAR HI-VIS RACK#904384	1 EA .00	26	0	0	206	0	0	0	0	0	0	0	0	0	0	0			
604611	KRAFT VELVEETA CHEESE 12/8 OZ.	12 CSE 34.50	19	19	17	18	18	22	16	24	19	0	0	24	0	0	0			
605022	KRAFT I/W AMERICAN SINGLES 12/8 OZ.	12 CSE 34.41	67	58	59	68	77	71	69	74	63	0	0	74	0	0	0			
605240	KRAFT DLX SLICED AMERICAN 12/8 OZ.	12 CSE 31.93	24	24	20	18	22	29	24	26	25	0	0	26	0	25	0			
605400	KRAFT MILD CHEDDAR CUBES 12/1.5OZ.	12 BOX 33.95	27	0	0	0	0	1	102	53	60	0	0	53	0	60	0			
605850	KRAFT MILD CHEDDAR CUBES 12/8 OZ.	12 CSE .00	13	18	19	26	20	23	0	0	0	0	0	0	0	0	0			
605860	KRAFT NAT MILD CHEDDAR 12/8OZ #194	12 CSE 32.93	33	29	30	37	35	38	31	33	34	0	0	33	0	34	0			
605865	KRAFT HALFMOON CHEDDAR 12/10OZ #205	12 CSE 35.14	33	34	31	35	26	40	26	32	40	0	0	26	0	32	0			
606236	KRAFT GRATED PARMESAN 24/3 OZ	24 CSE 34.65	6	5	5	4	6	7	5	4	8	0	0	4	0	8	0			
Total 1330 PACKAGED CHEESE/DIPS/OLEO/DAIRY			17	1337	372	341	1845	1647	1844	1439	1646	1552	0	0	0	0	0			

# Customer Monthly Movement Report (continued)

Creative Data Research		Customer Monthly Movement				CDRI	CVVPFR	9/19/02 16:02:49 Page 38									
		Period 8 2002															
Corporate # 711000 7-ELEVEN																	
Item Number	Description	Sell U/M	Retail Pft %	Avg. Usage	01	02	03	04	05	06	07	08	09	10	11	12	
*****																	
630810	TROP PURE PREM ORANGE JUICE 12/13OZ	12 CSE	.00	68	224	209	114	0	0	0	0	0	0	0	0	0	
630811	TROP P/PREM O.J.NO PULP 12/14OZ PET	12 CSE	30.23	262	0	0	212	283	418	357	437	388	0	0	0	0	
630812	TROP P/PREM O.J. W/PULP 12/14OZ PET	12 CSE	30.23	166	0	0	207	238	246	184	247	207	0	0	0	0	
Total 1340 REFRIGERATED BEVERAGES		3		496	224	209	533	521	664	541	684	595	0	0	0	0	
Final totals		1495		224890	204183	187831	216415	218117	250413	212823	275619	232978	0	0	0	0	