Faye Business Systems Group

Welcome to the software you've always wanted....

SAGE 100

SALES INTELLIGENCE REPORTS OPERATING MANUAL

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http://fayebsg.com/sage-sales-intelligence-reports/

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Overview

The **Sales Intelligence Reports** package provides management with all the tools they need to gain detailed access to critical system data. There are many options for custom reporting in Sage 100. However, FBSG's Sales Intelligence Reports are **fast**, **intuitive**, and provide an almost unlimited approach to slicing and dicing data however you need to see it. In addition, our programmers are available to quickly add new sorts, sub-sorts, or selection criteria as you need it.   And, best of all, the reports are available from within your Sage 100 menu structure…there's no need for external databases, synchronizations, expensive add-on servers, etc.

Key Features & Functions

- Print sales reports by customer, item, product line, and a variety of other criteria (7 possible sorts)

- Sort reports alphabetically or in convenient Top 10 or Top 20 lists

- Reports print fast and are easy to read

- No external databases, no special integration or synchronization required

- Reports print current month, current year, and last year for easy comparisons

1. Launch Sage 100.

2. Select **Sales Order** from the *Sage 100 Modules Menu*.

3. Select **Sales Intelligence Reports** from the *Sales Order Custom Reports Menu*.

Sales Intelligence Reports		
	Primary Sort	**Sub-Sort**
Sort Options	Customer	Inventory Item
Order By	Descending Order by Sales Quantity Shipped YTD	Descending Order by Sales Quantity Shipped YTD
Records to Print	Top 10 Only	Top 20 Only

Selection	All	Starting	Ending
Year		2010	
Period		2 February 2010	
Inventory Item	✓		
Customer	✓	00-	99-ZZZZZZ

CutePDF Writer   Recalculate History   Print   Preview   Printer Setup...

DF   JOR   02/03/2010

4. Make your **Sort** and **Sub-Sort** selections. Options are:

Options	Sort Options
Inventory Item	Customer / None
Product Line	Customer / Inventory Item / None
Customer	Inventory Item / Product Line
State	Customer / Inventory Item / Product Line
Salesperson	Customer / Inventory Item / Product Line
Customer Type	Customer / Inventory Item / Product Line
Customer Sort Field	Customer / Inventory Item / Product Line

Here are some common examples of selecting **Sub-Sorts**:

A.   If your primary sort is **Customer**, maybe you want a "sub-sort" by *Inventory Item* so that you can review what items your top customers are purchasing.

B.   If your primary sort is **Inventory Item**, maybe you want to "sub-sort" by *Customer* so that you can review which customers are buying your top selling items.

C.   If your primary sort is **State**, you can select a "sub-sort" of *Customer* and see your top customers in each state.

5.   Select **Order By** to control the order in which the sorts and sub-sorts print on your report.
Options are:

- Alphabetical
- Descending Order by Sales Quantity Shipped Year to Date
- Descending Order by Sales Dollars Year to Date

6.   Select the number of **Records to Print**. Options are:

- Top 10 Only
- Top 20 Only
- All

These apply to both the SORT and SUB-SORT records.

7.   Enter the **Year** and **Period** for which you want to print.

8.   Enter the range of selection criteria as needed. Leave these fields blank to see all records.

Customer Sales – Top 10 – Sorted by Year to Date Qty Shipped:
(no Sub Sort)

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Sales Intelligence Reports                                                                      ABC Company

Sales Intelligence Reports

                                         Product Line  to ZZZZ, Customer to ZZZZZZZ, Pd-Year 5-2009, by YTD Shipped
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CUSTOMER	MONTH TO DATE SHIPPED	SALES	GP %	YEAR TO DATE SHIPPED	SALES	GP %	LAST YEAR SHIPPED	SALES	GP %
0951214 - GREENFIELD DRUGS	656,651	481,046	36%	3639,896	2,697,845	38%	4705,346	2,902,193	35%
0200420 - JERRY SMITH	0	0	0%	1071,002	480,601	34%	2308,876	981,797	34%
0334707 - GIANT DRUGS	321,104	132,162	35%	747,360	329,465	37%	298,780	123,549	36%
0850489 - LAWRENCE BIRD	92,264	46,908	31%	696,998	326,712	35%	844,054	386,419	35%
0200688 - AXIOM PRODUCTS	126,714	70,569	29%	618,330	306,952	32%	1210,160	556,521	33%
0957118 - MVP INTERNATIONAL CORP.	10,080	4,334	34%	377,757	181,432	26%	445,367	214,834	32%
0850895 - GRANVILLE SPORTS	0	0	0%	289,555	147,193	19%	105,192	45,562	23%
0333524 - SAV-ON SUPERSTORES	47,574	29,303	44%	231,196	142,009	46%	311,462	185,692	45%
0957192 - BOULEVARD INTERNATIONAL	0	0	0%	229,889	106,688	28%	0	0	0%
0950180 - DOWNTOWN BEAUTY SUPPLY	28,080	16,757	34%	227,213	126,922	37%	473,080	234,831	37%
ALL OTHERS	1385,067	792,347	31%	6497,541	3,786,265	30%	5728,034	3,035,508	36%
REPORT TOTAL:	2667,534	1,573,426	33%	14626737	8,632,084	34%	16430351	8,666,906	35%

Product Line Sales – Top 10 – Sorted by Year to Date Sales Dollars:
(no Sub Sort)

Sales Intelligence Reports

ABC Company

Sales Intelligence Reports

Product Line to ZZZZ, Pd-Year 5-2009, by YTD Sales

PRODUCT LINE	MONTH TO DATE SHIPPED	SALES	GP %	YEAR TO DATE SHIPPED	SALES	GP %	LAST YEAR SHIPPED	SALES	GP %
EE - MECHANICAL	210,851	178,310	39%	1155,642	978,158	39%	1299,725	1,067,253	37%
NP - NAIL POLISH	267,521	144,476	35%	1540,774	808,853	31%	2058,707	950,719	29%
AJ - ALL JOINTS	266,581	111,049	41%	1812,176	791,735	42%	2994,920	1,221,663	39%
LS - LIPSTICK	270,742	124,094	38%	1229,246	579,434	40%	1382,071	617,981	38%
L - LIPLINER PENCILS	139,355	57,674	42%	1054,236	460,099	46%	1756,351	708,098	42%
GT - GREAT TEES	71,290	65,266	48%	446,608	407,942	48%	565,399	485,477	47%
EL - EXTENDED LEGS	86,235	72,646	38%	476,445	403,505	39%	623,359	502,602	36%
LG - LARGE GAPS	77,627	71,916	33%	380,780	353,802	34%	365,799	332,522	32%
TC - TOP CARS	68,939	64,083	34%	375,607	348,792	33%	452,370	410,520	29%
BP - BURIED POTS	91,777	64,223	32%	447,302	316,377	34%	502,484	338,799	36%
ALL OTHERS	1116,616	619,688	25%	5707,921	3,183,385	25%	8101,598	3,972,711	28%
REPORT TOTAL:	2667,534	1,573,426	33%	14626737	8,632,084	34%	20102783	10,608,344	33%

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