



## Sales Analysis

### Objective

To provide accurate management information relating to sales activity in order to improve sales profitability and provide facilities for sales forecasting and planning at customer and product class levels.

### The Value of Sales Analysis

- Identify the most profitable customers
- Know which products are selling
- Analyze market trends and geographic buying patterns
- Calculate the profit generated by each product
- Determine which divisions of business are selling
- Identify which salespeople are performing
- Instantly display sales performance for presentations and reports with business graphics
- Improve sales forecasting
- Measure actual performance against quantity or revenue forecasts
- Analyze tax collections
- Set targets against customers and/or products
- Compare against budgets per product group and/or sales person

### Matching Sales Analysis to your business

- Choose the data to analyze with user-defined sales history options
- Retain analysis against sub-accounts (branches) while invoicing the master account (head office)
- Create budgets (expected sales or quotas) for salespeople, customers and product lines utilizing user-defined time period for analysis (day, week, etc.)
- Retain up to 24 months of sales history online
- Protect the bottom line by checking that a minimum profit is realized on all sales
- Update sales analysis statistical files at anytime
- Correct sales transactions without interrupting invoicing
- Update invoice and detail line data online as invoices are printed
- Update statistical values separately to allow control of the contents of the Sales Analysis database

### Integration

- Integrates with the following modules:
  - Accounts Receivable
  - Inventory
  - Sales Orders

### Audit trails and reporting

- Provide user-defined selection criteria for flexible reporting
- Sales Profitability Analysis reports line item gross profit
- Provides daily and monthly sales turnover reports
- Allow actual to budget comparisons and profitability analysis by salesperson and product type
- Highlight missing invoice numbers
- Document all minimum profitability overrides
- Generate extensive reports such as:
  - Sales by salesperson
  - Customer
  - Product type
  - Branch
  - Geographic area
  - Profit by invoice, etc.
- Provides sales tax reporting in detail or summary
- Allow commission calculation and reporting

