SYSPRO™

SANTA CLARITA CONSULTANTS EnterpriseWise™

800-742-4868

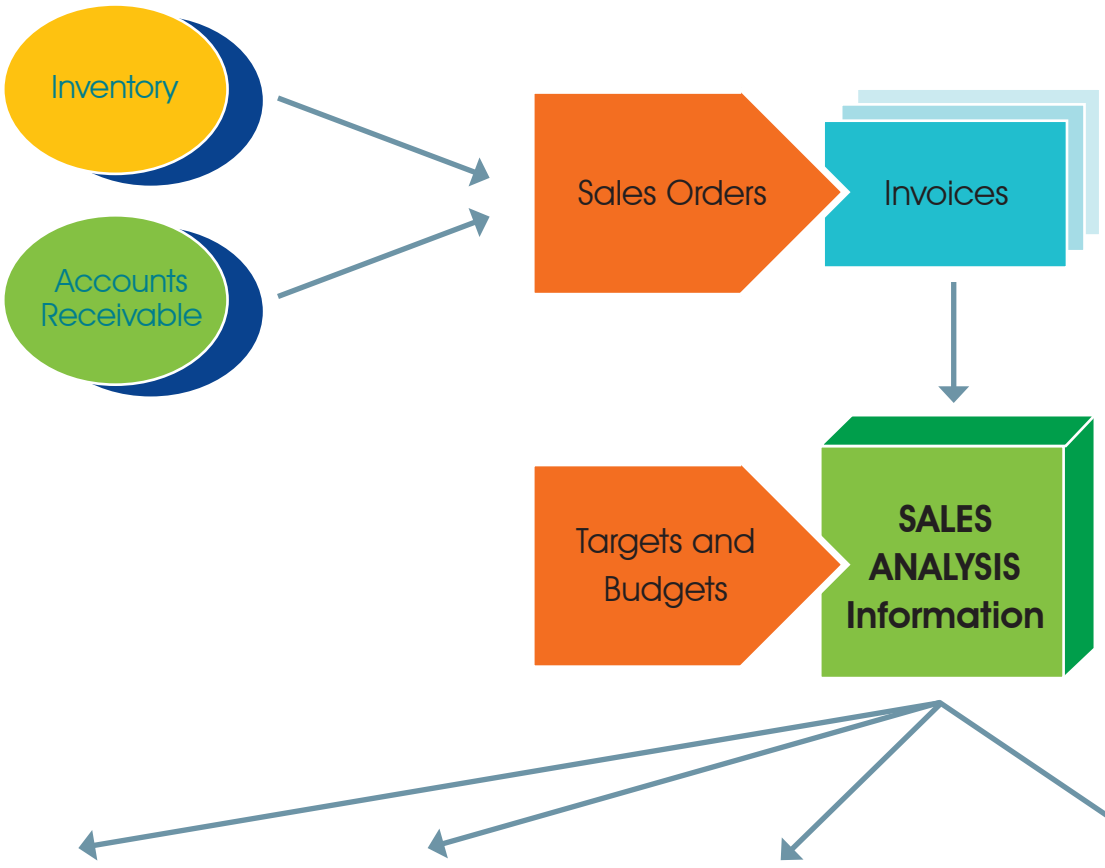
Sales Analysis

Fact Sheet

SYSPRO Sales Analysis provides 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.

SYSPRO Sales Analysis also assists in determining the extent to which a sales force has met its sales objectives through the provision of analysis on how well Sales people and product groups are performing compared to budgets available.

The Sales Analysis system is the focal point for the accumulation of sales data generated from other modules. Sales history is accumulated in a wide variety of user-defined formats such as: salesperson, product class, customer, warehouse, geographic area, customer class, stock code, order type and branch. Information can be displayed in bar charts or reports. Various budgets and targets can be entered based on user-defined groupings. In addition Tax and Commission reporting can be performed.



Sales Query

- By Branch - Salesperson / Product Class)
- Quantity / Value
- Actual vs Budgets

Lost Sales Review

- By Reason Code

Sales Target Reports

- By Customer, Product Class, History Keys
- Performance / Achievement
- Profit Figures / Quantity / Mass / Volume

Sales Analysis Reports

- Sales Turnover
- Sales Profitability
- Sales Commission
- Sales Tax
- EC Intrastat

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The Facts

Fact Sheet

The Benefits 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
- Protect the bottom line by checking that a minimum profit is realized on all sales

Sales Analysis Features

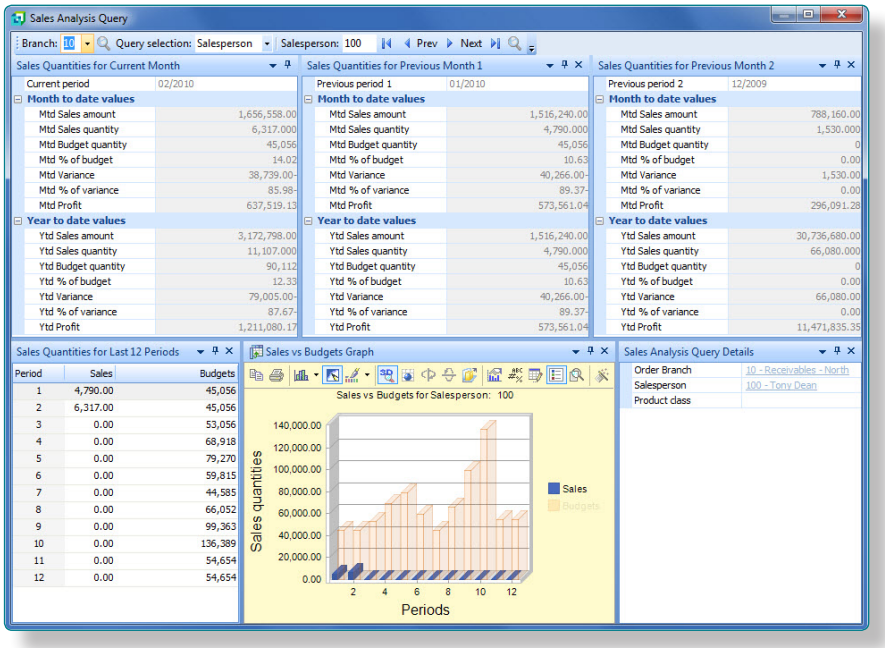
- Choose the data to analyze with user-defined sales history options
- Retain analysis against sub-accounts (branches) while invoicing the master account (head office)
- Create budgets (expected sales or quotas) for salespeople, customers and product lines utilizing user-defined time period for analysis (day, week, etc.)
- Retain up to 24 months of sales history online
- 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 with SYSPRO

- 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
- Consolidated reporting of sales tax



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