
Sales History Report Enhancement

IM-1089

Overview

This Extended Solution to the Inventory Management module modifies the Inventory Sales History Report to print Year-To-Date Total Quantity, Total Dollars, Total Profits and Total Profit Percent. A 'super sort' by Salesperson is available.

Installation

Before installing this Extended Solution, please verify that the version level(s) printed on the CD label are the same as the version level(s) of the MAS 90 MAS 200 module(s) you are using. For further information, please see the Upgrades and Compatibility section below. Check your Shipping Manifest for a complete list of Extended Solutions shipped.

For detailed installation instructions, please refer to the Sage website at:

http://support.sagesoftwareonline.com/mas/extended_solutions/main.cfm

Installing Your Extended Solutions under Windows

From a CD

If you have the *autorun* function turned on for your PC, the installation program will start up automatically. If not, find the **autorun.exe** file on your CD-ROM drive and double-click it to start the installation program. Follow the on-screen instructions.

From the Sage FTP site

When your Extended Solution is ready to be downloaded, you will receive an email from 'extendedsolutions.na@sage.com' telling you that it is ready. The email will contain the Customer Name, Cross Reference, a case-sensitive Password, a link via which you can download your Extended Solution, instructions and a Shipping Manifest. If you have any problems with this order, please email extendedsolutions.na@sage.com and we will assist you during normal business hours.

Extended Solutions Control Center

Installing any Extended Solution will add an Extended Solutions Control Center to the MAS 90 MAS 200 Library Master Utilities menu. When you open the Control Center, the following options will be available:

- Extended Solutions Manuals
- Remove Extended Solutions
- Unlock Extended Solutions
- Merge Installation Files
- Extended Solutions Setup options

Custom Office

If you customize your MAS 90 MAS 200, then you must run the Update Utility *every time* you install this Extended Solution.

Setup

Once the disk is installed, you will need to access the Inventory Management Setup menu option screen. After the option screens have been displayed, a Setup screen for this Extended Solution will appear. Check the 'Enable Extended Solution' box to activate this Extended Solution (Figure 1). The manual for this Extended Solution, if it has been installed, can be viewed by clicking the 'Manual' button next to the 'Enable Extended Solution' check box. It can also be viewed via the Extended Solutions Control Center (see Installation, above).

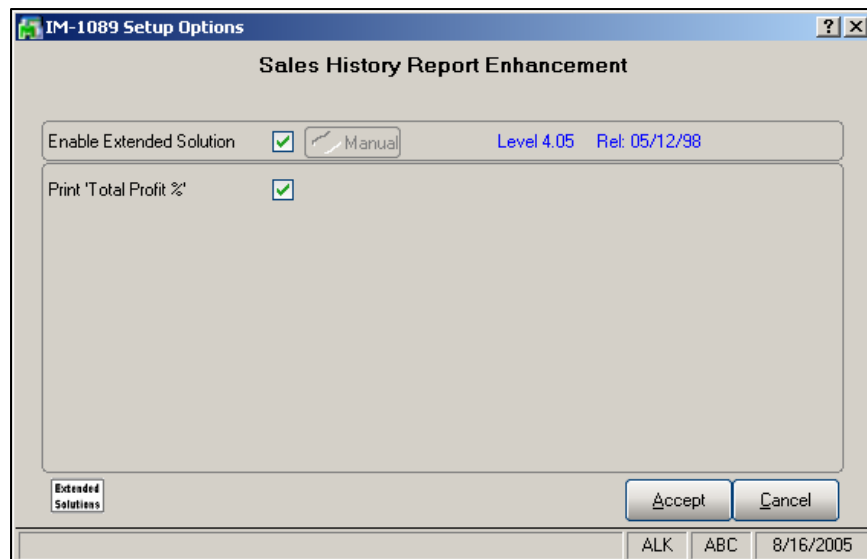


Figure 1

Answer the following prompt:

PRINT TOTAL PROFIT %: Check this box to Print Total Profit Percent on the report.

You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Operation

The Inventory Sales History Report, Warehouse Detail sorted by Item Number, Customer Detail sorted by Customer Number and Item Summary sorted by Item Number will print one blank line then two Totals lines for each item included on the report. The Totals lines will print the YTD Total Quantity, YTD Total Dollars, and if specified on the Setup screen, Total Profit Percent for Year-To-Date (Figure 2).

Extended Solutions

NDC												
INVENTORY SALES HISTORY REPORT												
WAREHOUSE DETAIL SORTED BY ITEM NUMBER												
FOR YEAR 2003												
ITEM NUM.	JAN	FEB	MARCH	APRIL	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
1001-HON-H252 HON 2 DRAWER LETTER FLE W/O LK PROD LN: WF&A PROD TYP: FINISHED GOOD U/M: EACH												
WAREHOUSE: 000 CENTRAL WAREHOUSE												
QTY SOLD:	375	540	370	413	350	0	0	0	0	0	0	0
\$ SOLD:	3,527	4,520	2,960	3,304	2,919	0	0	0	0	0	0	0
PROFIT %:	32.52 %	29.20 %	28.21 %	29.18 %	33.54 %	00 %	00 %	00 %	00 %	00 %	00 %	00 %
COG SOLD:	2,380	3,200	2,125	2,340	1,940	0	0	0	0	0	0	0
QTY RTRN:	0	0	0	0	0	0	0	0	0	0	0	0
YTD TOTAL QTY:	2,048		YTD TOTAL \$:		17,230		TOTAL PROFIT %:		30.44			
WAREHOUSE: 001 EAST WAREHOUSE												
QTY SOLD:	14	8	5	9	206	0	0	4	0	0	0	0
\$ SOLD:	1,088	661	377	745	9,916	0	0	336	0	0	0	0
PROFIT %:	62.51 %	62.50 %	62.54 %	62.51 %	53.30 %	00 %	00 %	62.96 %	00 %	00 %	00 %	00 %
COG SOLD:	408	248	141	279	4,631	0	0	124	0	0	0	0
QTY RTRN:	0	0	0	0	60	0	0	0	0	0	0	0
YTD TOTAL QTY:	246		YTD TOTAL \$:		13,123		TOTAL PROFIT %:		55.56			

Figure 2

The Total Profit Percent is calculated by subtracting the total Cost of Goods Sold (COGS, not printed on the report) from the Total Dollars amount, divided by Total Dollars. The Total amounts represent the sum of each warehouse amount for each listed item for January through December. In addition to the standard MAS 90 MAS 200 information printed on the report, report total and subtotal lines for each element included on the report also print.

Super Sort By Salesperson

When the standard report is run sorted by Customer Number, an additional option of 'Salesperson' will be available on the selection screen (Figure 3) by clicking the 'More...' button (Figure 3a). When this additional sort is chosen, a range of Salesperson Codes may be entered. The report will then be sorted by Salesperson Code/Customer Number. The Salesperson Code and Name will print at each sort break (Figure 2). Other than the addition of the Salesperson 'super sort', no new data elements or reformatting will be made.

Figure 3a

Figure 3

Note that the Salesperson Code used will be the Salesperson Code **currently** referenced in the Customer Masterfile of customers included on the report, thus the Salesperson may not necessarily be the Salesperson Code referenced during the sales transactions.

Helpful Hints

- On the Inventory Setup screen, if you specify 'C' for calendar year, the Totals line on the report will reflect year-to-date totals. If you specify 'F' for fiscal year, the Totals line reflects the total quantity and dollars from January through December as shown on the report.
- This report pulls information from the IM9 file. If there are no existing records that include the Customer Number, any report sorted by Customer Number will not find any data.

Upgrades and Compatibility

The installation CD is labeled with the version of the MAS 90 MAS 200 module for which this Extended Solution was prepared. This Extended Solution will check its compatibility with the appropriate MAS 90 MAS 200 modules and will be disabled if an incompatibility is found. If you upgrade your MAS 90 MAS 200 modules, this Extended Solution must be upgraded as well. Your MAS 90 MAS 200 dealer can supply this upgrade.

Documentation

Only changes made to the standard operation of MAS 90 MAS 200 have been documented in this manual. Operations not documented in this manual are standard procedures of MAS 90 MAS 200 processing. Standard MAS 90 MAS 200 processes, data entry screens, inquiry screens, reports, updates, etc., have not been changed unless addressed in this document.

Parts of this document may refer to the *Specific Purpose Rule*. When referenced, the described feature was developed for a specific client to its specifications and may not conform to generally accepted MAS 90 MAS 200 standards and procedures. These features may or may not benefit you in your application of MAS 90 MAS 200.

Acknowledgments

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