



Sales Analysis

OneOffice 3000 Sales Analysis integrates with Sales Order Processing to provide you with analysis facilities of a power and flexibility typically found in custom-built applications.

Key Features at a Glance

Sales Analysis is designed to store all the information you want to keep while filtering out the non-essential. Up to 3 separate databases can be defined - one for invoice line details and two summary databases for rapid access where that level of details isn't required - and the content of each database is entirely up to you. You might choose, for example, to keep three years' worth of figures for turnover, costs, discounts and units, or opt for four years of units and turnover and four years of cost and discount.

The result is that enquiries can be as general or particular as you like, without impacting on system performance. Whether you want to examine year to date sales of a particular product in a range of territories or display a replica of an invoice from five years ago, the

response is rapid and the figures meaningful.

Sales Analysis reporting options are equally impressive. Reports can be sequenced by up to 4 keys (product group within delivery address within customer within salesperson, to take one example), and the data selected for printing restricted by up to 6 separate ranges. Then you have the choice between 8 different report layouts (including the option to extract the data for further processing via Global Reporter), plus options to sort alphabetically or by turnover. There's also the facility to restrict the report to a chosen number of top performers, for example your top ten (or whatever) customers, products or sales people.

Benefits

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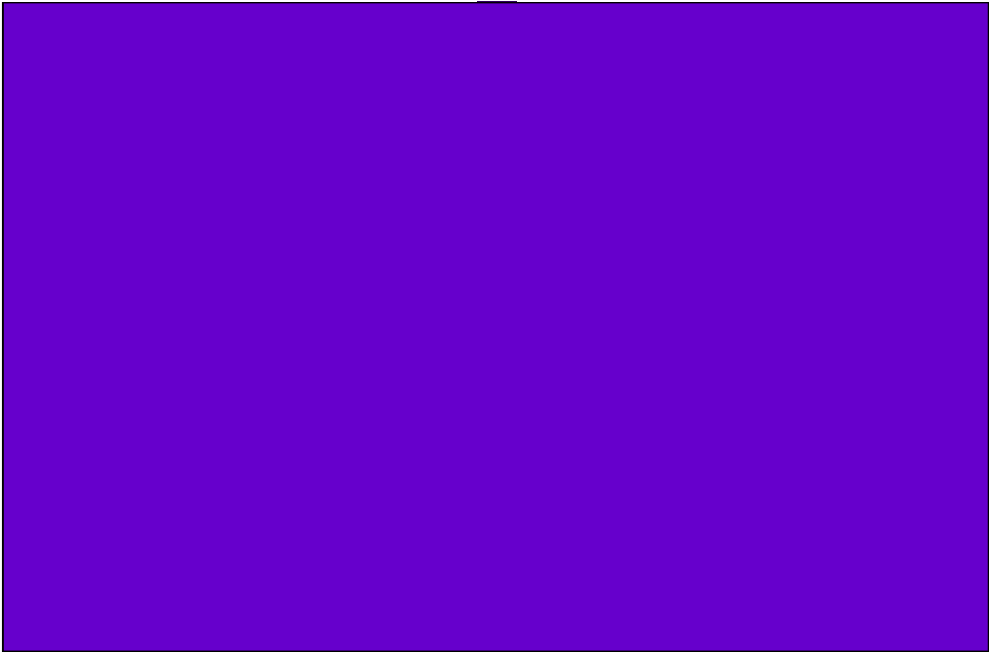


Figure 1. Copy



Specification

Integration

Global Sales Analysis integrates with:

- Global 2000 Sales Order Processing
- Global 2000 Invoicing
- OneOffice 3000 Sales Order Processing
- Global Reporter

Backup Procedures

Depending on the posting method chosen (see below), Sales Analysis data may be backed up separately or as part of the backup procedures for Sales Order Processing or Invoicing.

Databases

- Up to 3 separate databases can be maintained and the level of detail within each one is fully parameterisable
- One database holds summary of invoice lines; two summary databases allow fast enquiries where invoice level detail is not required
- Up to 12 annual sets of data may be kept, divided between four types: turnover, cost, discount, units, to a maximum of 9 years' data of any one type

Postings

Postings to the Sales Analysis databases from Global 2000 Sales Order Processing/ Invoicing or OneOffice 3000 Sales Order Processing may be made either directly, at end of session in the posting module, or at user-determined intervals, via an intermediate file. The former ensures that sales analysis information is accurate to the end of the last session; the latter enables you to back up the sales analysis data less frequently.

Budgets

Sales targets can be set for any field (e.g. salesperson, territory, product, product

group, customer, customer type, warehouse) or any combination of fields and for each accounting period in the current year. Two sets of budgets may be defined.

Journal Transactions

Journal transactions allow you to correct details on the sales analysis database which have been entered incorrectly, without the need to enter a credit note or corrected invoice. 'Reclassification' journals allow you to change the salesperson, territory etc for an invoice. 'Singlesided' journals enable you to revise incorrect invoice history.

Product Enquiries

- Enquiries can be restricted to one or more of the following: customer, salesperson, territory, customer classification, warehouse or delivery address
- Summary window shows monthly figures for turnover, units, cost, discount %, profit % plus year to date totals. Previous periods can also be shown
- You can list all customers to whom a product has been sold in the current year to date, with year to date sales totals for the customer/product combination, plus the option to examine individual sales down to invoice line details
- Further option to display full invoice details for any individual customer/product sale (i.e. including lines for other products, profit margins and header details)

Customer Enquiries

- Enquiries can be restricted to one or more of the following: product, product group, warehouse, delivery address
- Summary window shows monthly figures for turnover, units, cost, discount %,



profit % plus year to date totals. Previous periods can also be shown

- You can list all products sold to this customer in the current year to date, with year to date totals for each product, and list invoices, with a summary of the item line involved
- Further option to display full invoice details (i.e. including lines for other products, profit margins and header details)

Invoice Enquiries

- Individual invoices can be selected for display by invoice number or by defining one or more of these selection criteria: customer, product, salesperson, customer classification, territory, product group, delivery address, warehouse

- Invoice display shows invoice number, invoice date, customer details (name, number, order reference number, classification code and description, delivery address code), salesperson name and code, and territory name and code.

Each line shows invoice line number, product code, product description, invoice page number, quantity, warehouse code, cost discount, net, profit, discount %, profit % • Items not recorded (and hence not shown) include currency information, VAT, non-standard product descriptions, comments, transaction numbers, 2-unit information, weight, order type and non-standard invoice addresses, delivery and special instructions

Reporting

Sales Analysis provides complete flexibility as to the content and format of reports. You can choose up to 4 keys for sequencing the report from the following list:-

- Customer
- Product
- Salesperson
- Territory

- Classification
- Delivery address
- Product group
- Warehouse
- Invoice/credit note

Data can be restricted to up to 6 ranges within the above keys. The ranges can be applied to fields not chosen for report sequencing and more than one range can be applied to the same key. You can choose between eight layouts, determining the type of information displayed:-

- Turnover, discount %, profit %, units - current period and year to date
- Turnover - last n periods and total
- Unit sales - last n periods and total
- Turnover, budget, variance, variance % - current period and year to date
- Budgets - each period of current year and total for year
- Turnover, last year, variance, variance % - current period and year to date
- Individual invoice line details Reporter interface extraction (for further processing via Global Reporter)

The order of the report can be:-

- Alphabetic
- By turnover (current period or year to date)
- Unsorted

If you choose turnover, the order can be ascending or descending, and you can restrict the report to a chosen number of top performers.

Help

On-screen help is available at a number of level. At any point the user can get help on keyboard usage or the current program, and browse valid responses for data entry.



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