



TakeStock Data Sheet: Sales Analysis

Sales Analysis allows users to design a wide variety of their own reports in cumulative, comparison or multi-period formats.

The comprehensive and accurate analysis of sales transactions is critical business information that companies need to maximize their sales efforts. TakeStock's Sales Analysis is a solution that provides complete and flexible sales reporting on key information that companies need to help them make strategic business decisions.

An extensive inquiry capability provides access to historical information through analysis tools that help identify sales trends, track profits by customer, detect slow-moving products and make stocking decisions. The sales commission interface enables users to calculate commissions on sales or gross profit, upon billing or payment and with commission rates based on customer, item or salesperson.

Warehouse Historical Data

- Stores sales analysis data by customer, item, salesperson, branch/warehouse, item/warehouse and vendor/item
- Maintains history for user-defined number of years for comparison reporting
- Allows customer data to be stored by ship-to and later summarized



focus on essentials

➔ CUSTOM MULTI-PERIOD:

- Customer
- Customer Name
- Alternate Sort
- Salesperson/Customer Name
- Category/Customer Name
- Zip/Postal Code/Customer

➔ CUSTOM MULTI-PERIOD:

- Customer/Item
- Customer/Item Category/Item
- Category/Customer/Item
- Salesperson/Customer/Item
- Categories/Item
- Zip/Customer/Item
- Item/Customer
- Item/Category/Item/Customer
- Item Category/Customer/Item

Reporting

- Includes sales, cost, gross margin, gross margin percent and units as report options
- Excludes history meeting user-defined criteria (ie. customers with sales for last period less than \$100.00)
- Ranks in ascending or descending order by sales, cost, units, gross margin or percent
- Prints based on user options for format, content, sort order and detail levels
- Formats data in three categories: Accumulated, Comparison, Multi-periods
- Provides on-screen inquiry against sales analysis tables
- Rounds based on user-defined cutoff

Commission Control

- Provides flexible commission rate determination by customer, item or salesperson for up to 5 salespeople including sales manager per order
- Initiates payment upon original posting or after invoice is paid
- Retains paid commissions for user-defined number of periods
- Calculates based on sales or gross margin
- Posts in summary or detail.

Warehouse / Item Multi-period

- Warehouse/Item
- Warehouse/Vendor/Item
- Warehouse/Major Category/Item
- Item/Warehouse
- Vendor/Item/Warehouse
- Vendor/Warehouse/Item
- Major Category/Item/Warehouse
- Major Category/Warehouse/Item
- Item/Warehouses (Combined)

Salesperson/Item Multi-period

- Salesperson/Item
- Salesperson/Major Category/Item
- Region/Salesperson/Item
- Region/Salesperson/Major Category/Item
- Item/Salesperson
- Major Category/Item/Salesperson
- Major Category/Salesperson/Item

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