SALES ANALYSIS

The Sales Analysis module collects information from the Jobs module and Sales Order module.

All sales are summarised into specific groupings - these groupings are then split into sales this month and year to date. Last year's sales can also be compared with sales made in the current year.

You can record up to seven groupings in this module. These can be switched on by:
<Tools> (button at the top of the screen)
<System setup>
<Sales analysis>
Make the selection from customer code, job type, industry type, area, grade and department tick boxes.

Sales analysis summarises sales into these groupings:

1. Department
Printcost departments are normally based on the "departments" involved in the production process. Refer to System Setup to see how departments have been set up in your system:
- <Tools> (at top of screen)
- <System Setup>
- <Department>

The Analysis code field updates to Sales Analysis: a sales code can be used for more than one department. This will group these sales.

2. Job Type
This is the same as product type. The Job type field in jobs and the sales code field in the Inventory Master file will be summarised.

NB for the sales code in stock to update in sales analysis you must put a code into the inventory sales field in Setup Departments, otherwise these sales from stock will be recorded in the "department" grouping.

- <Tools>
- <System Setup>
- <Department>
- <Inventory Sales> (enter code)

The option **must** be used if you want a product type analysis when using both the Jobs and Sales Order modules.

3. Industry Type
This will summarise by the industry type recorded against each customer. For this to work correctly all customers must have an industry type.

4. Salesperson
Each time you enter a Job or Sales order you can record which sales person made this sale. This information is expected to come from the customer file but can be changed for a particular job.

5. Customer Code
Summarises each sale made, by customer.
This is automatically taken from the customer code field in the customer file. NB this will make this file very large

6. Area
This will summarise by the areas recorded against each customer. The area is normally a geographic area, but it could be used for any purpose.

For this to work properly, all customers must have an area recorded. The areas are set up in Misc Data, Tag Maintenance, and will show in the area field as a drop down list.

7. Grade

This will summarise by the grades recorded against each customer. For this to work correctly all customers must have a grade recorded. The grades are set up in Misc Data, Tag Maintenance, and will show in the grade field as a drop down list.

Updating Sales Analysis

Sales Analysis is updated only when invoiced jobs or sales orders are posted. To get the month's sales information, reports must be done
after invoices are posted, but before they are aged. Sales are aged as part of the Accounts receivable ageing. (Refer pg 18)

Sales Analysis Problems and How To Correct Them

There are three main reasons for the analysis to be wrong. These are:
1) The groupings are not created correctly in the Customer, Job and Inventory Master File.
2) Credits are created without care being taken to reverse all groupings. Using "Reverse Charge" in Jobs eliminates this.
3) It is critical that data entry operators are careful when creating jobs where groupings like Job Type are used. If the grouping is left out, or entered incorrectly, the job type analysis will be incorrect even though the total sales are correct.

Corrections must be made from the source (module) of the original record. So if a job was invoiced incorrectly a "credit" job must be raised and then re-invoiced. ("How to Credit an Invoiced Job", pg 42)

All parts of the original sale must be reversed - sales person, department and job type.

The easiest way to do this and make sure all information is added correctly is to find and copy the original job - just hold the Control key down and click the Copy Job button. Go to the invoice screen, use the "Reverse Charge" button, then select from Reverse charge, or reverse first delivery

NB a correction made by a credit or invoice journal entered through "Accounts Receivable" will not reverse the sales groupings and your sales figures are likely to be incorrect.