Infor Distribution A+ Sales Analysis Overview

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Sales Analysis Overview

The Sales Analysis module allows you to analyze the sales performance of your customers, items, corporate groups, and sales representatives, using inquiries and reports.

Interfaces

This section describes how Sales Analysis interfaces with other Infor Distribution A+ modules.

Sales Analysis is installed with the following base modules:

- Order Entry
- Accounts Receivable
- Inventory Accounting

The Bill of Material module may also be installed as an add-on module for sales of bill of material items.

Order Entry

When Sales Analysis is set to interface with Order Entry, every order you create updates Sales Analysis. Infor Distribution A+ assigns to each order a primary sales representative, customer and, optionally, a ship-to address.

Sales Analysis reports and inquiries access data files that retain item information, number of orders for each customer and ship-to address, total sales, profit, and total cost of goods sold. Infor Distribution A+ updates these files daily during Day-End Processing (MENU XAMAST).

The Sales Recap Inquiry (MENU OEINQY) menu option of Order Entry has the ability to calculate a projection of sales data for stock orders, drop ship orders, special orders, and warehouse transfer orders for a sales period that is not yet complete, (i.e., for a sales period in which sales have not yet been recorded for the entire period).

The projection calculation uses three fields defined in SA/PO Fiscal Calendar Maintenance (MENU SAFILE):

- the number of business days contained in the entire incomplete period, as defined in the Business Days Per Period field on the SA/PO Fiscal Calendar Screen
- the number of business days specified in a sub-period of the incomplete period, as defined in the
- Business Days field on the Business Day Distribution Pop-up Window
- the percent of the period’s sales that are expected to occur during the specified sub-period of the incomplete period, as defined in the Percent of Period Sales field on the Business Day Distribution Pop-up Window

Refer to the Sales Recap Projection topic in the Overview section of the Order Entry User Guide for an explanation of the projection calculation.

Accounts Receivable

All customer information is maintained through the Accounts Receivable module. MENU SAMAIN displays customer information for a company that includes the number of orders for each customer, corporate group and, optionally, ship-to. This information includes total sales, profit, and total cost of goods sold for each customer, corporate group, ship-to or alternate ship-to address. Through Sales Analysis Options Maintenance (MENU XAFILE), you can save detailed sales analysis data, and do so at the ship-to level, if you desire. The Detail Item Sales Analysis File (**DETSA**) retains sales history for an item, company, customer, corporate group and, optionally, ship-to address for each period of a fiscal year. Total drop shipment sales and quantities are similarly retained.

Corporate groups are customers organized into blocs according to their like attributes. For example, customers may be grouped on the basis of a common geographic location or, perhaps, because they demonstrate similar sales volumes. Like company, customer, ship-to and sold-to address, corporate groups constitute an organizational level on which sales analyses can be performed.

Corporate Groups are created and maintained through Corporate Group Maintenance (MENU ARFILE and MENU SAFILE). Customers are associated with specific groups through Customer/Ship to Master Maintenance (MENU ARFILE).

Inventory Accounting

Based on the items that have been ordered, the total sales amount, total cost amount, and total quantity of items ordered are maintained for each item in a warehouse. This information is stored with item balance information. This allows you to inquire and report on the performance of an item in a single warehouse, or in all warehouses. Drop shipment sales information is also retained.

Bill of Material

If Bill of Material is installed, Sales Analysis is updated for sales of bill of material items. It is updated differently for each parent type:

- Manufactured items: Sales are posted for the parent item
- Assortments: Sales are posted for the component item
- Kits: Sales are posted for the parent item

File Maintenance

The following file maintenance options are available through Sales Analysis:

- Sales Representatives
- Sales Representative Budgets
- Territories
- SA/PO Fiscal Calendar
- Corporate Groups

For each file maintenance option, listings are available.

The file maintenance options (and listings) for these files are explained in detail in the MENU SAFILE section of this user guide.

Sales Representatives

Sales Representative Maintenance (MENU SAFILE) contains one record for each sales representative defined for a company. Sales representatives are identified by a unique sales representative number. For each sales representative number, you indicate the sales representative’s name and commission percentage.

Sales representatives are assigned to customers and are used as the primary sales representative for any order placed by that customer. Sales Analysis provides several inquiries that allow you to analyze the performance of your primary sales representatives.

The Salesrep Comparison (MENU SAMAIN) menu option allows you to analyze a sales representative’s performance where the representative was credited with the sale of an order. The first sales representative listed on the Second Order Header Screen receives credit for that sale (Enter, Change & Ship Orders, MENU OEMAIN).

Sales Representative Budgets

The use of Sales Representative Budgets (MENU SAFILE) is optional. This file contains one record for each sales representative and fiscal year. Each record contains the monthly budget for each period of the fiscal year for each sales representative. This budget can be compared to the actual sales performance information for a single sales representative through Sales Representative Comparison (MENU SAMAIN).

Territories

Territories Maintenance (MENU SAFILE) contains one record for each sales territory that is used in Infor Distribution A+. When customers are defined in Accounts Receivable, a sales territory must be assigned to the customer definition. You can print reports and use inquiries throughout Infor Distribution A+ for a single sales representative territory. Sales representative territories are represented by a three-character code and are defined for each company.

SA/PO Fiscal Calendar

Use of the SA/PO fiscal calendar is required for each company that you establish through Company Name Maintenance (MENU XAFILE). These fiscal calendars are used to effectively capture and organize certain sales and purchasing values for use in future analysis. The values related to certain dated transactions and activities (manual and system generated) are separated into “periods” according to how the SA/PO fiscal calendar is defined through SA/PO Fiscal Calendar Maintenance (MENU SAFILE).

The SA/PO Fiscal Calendar File contains one record for each company for each fiscal year. Date ranges defining the 12 or 13 periods for each company’s fiscal year are maintained and are then used to determine which values are to be captured in which period, based upon the date of the transaction or activity. For example:

- SA/PO fiscal calendars are used by the demand update process to convert an Order Entry requested ship date to a Sales Analysis (SA) fiscal period so that an adjustment is made in the correct period
- SA/PO fiscal calendars are used by the buyer budget process to convert a Purchase Order print date to a Purchasing (PO) fiscal period so that the PO amount is credited to the correct period in the buyer’s budget

Once stored in the correct periods, values can then be reviewed and utilized in reporting and analysis functions. For example:

- The Buyer Analysis Report (MENU POREPT) can then be run to compare the PO values extracted and retained based on the specified fiscal calendar to the expected budget values which are defined through Buyer Budget Maintenance (MENU POFIL2).

Once an SA/PO fiscal calendar is defined, it may also be used for Order Entry measurement functionality. This is done by first breaking down each defined fiscal calendar period into actual business days per sub-period and then associating that number of business days with a percentage of the expected monthly sales. With this information, projections of expected sales for periods not yet completed and closed may be generated through the Sales Recap Inquiry (MENU OEINQY).

Corporate Groups

The Corporate Grouping feature allows you to organize your customers into groups having a common attribute. You can then view sales, profit, total orders, gross profit, and gross profit percentage for each group through Customer Comparison (MENU SAMAIN) and Customer/ Item Analysis (MENU SAMAIN), and Item/Customer Analysis (MENU SAMAIN).

You define corporate groups through Corporate Groups Maintenance (MENU SAFILE). After defining a group, you can assign a customer to it by specifying the corporate group name in Customer/Ship-to Master Maintenance (MENU ARFILE).

Sales Analysis Inquiries

The following types of inquiries are included in Sales Analysis: Graphic and Standard.

Inquiries provide access and analysis of sales performance information for sales representatives, customers, corporate groups, and items.

Graphic Inquiries

Sales Analysis consists of three graphic inquiries: Salesrep Comparison, Customer Comparison, Item Comparison. These inquiries display sales information in a bar graph. Standard (non-graphic) screens are also provided so you can determine the actual numbers that comprise the graph. For additional information refer to the CHAPTER 2: Using Sales Analysis.

Salesrep Comparison

The Salesrep Comparison compares the performance of a single sales representative for any two fiscal years, or for the actual sales to the sales representative’s sales budget. Performance is measured in terms of the number of orders, total monetary amount, total cost amount, and gross profit percentage of orders for the sales representative. The values are based on the sales information where the sales representative is the first primary sales representative listed on the Second Order Header Screen (Enter, Change & Ship Orders, MENU OEMAIN).

Customer Comparison

The Customer Comparison compares the purchasing pattern of a single customer (or customer ship-to, alternate ship-to, or corporate group) for any two fiscal years. Buying patterns are reported in terms of the number of orders placed, total monetary amount of purchases, total cost amount of items sold, and the gross profit percentage for the customer or group.

Item Comparison

The Item Comparison compares the sales history of a single item for any two fiscal years. Sales performance is measured in terms of the quantity of items sold, total monetary amount of sales, total cost amount of items sold, and the gross profit percentage for the item.

Standard Inquiries

The standard inquiries available in Sales Analysis are similar to most Infor Distribution A+ inquiries. They are different from the graphic inquires in that they do not provide a visual bar graph representation of the data being inquired upon.

The standard inquiries available in Sales Analysis are: Customer/Item Analysis and Item/ Customer Analysis.

Sales Analysis Reports

Two types of reports are available in Sales Analysis: Variable format and Standard format.

In addition, cost and profit information will only print on a Sales Analysis report from MENU SAREPT if the user has authority to the **Display OE Cost and Profit (OE, SA, AR, some PO)** and/or **Display GL Cost and Profit (OE, SA, AR, some PO)** application actions in Application Action Authority Maintenance (MENU XASCTY).

Variable Format Reports

Variable format reports allow you to select the sequence, lowest level of detail, and selection criteria of items to print on the report. The Sales Analysis reports in this category are:

- MTD/YTD Sales Analysis
- Comparative Sales Analysis
- Six Month History

Standard Format Reports

Standard format reports available in Sales Analysis are always printed in the same format regardless of your selection criteria. These reports are:

- Customer Ranking Report
- Item Ranking Report

- Customer Drop Shipment Analysis
- Item Drop Shipment Analysis