



Infor System21 Style Sales Analysis

Product Guide

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About this guide

The purpose of this document is to describe the functions that can be used within the Style Sales Analysis Module.

Intended audience

The guide is intended for any users of the STSA Style Sales Analysis business module.

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at www.infor.com/inforxtreme.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Introduction

In today's increasingly competitive markets, the availability of clearly presented and easily manipulated sales information is of paramount importance in directing the efforts of the business.

The Style Sales Analysis application enables you to produce your own views of sales information, to help you to make comparisons and identify trends which are vital to strategic planning.

One of the great strengths of Sales Analysis is the extent to which individual users are able to tailor the system to their own requirements without the need for any programming. This flexibility starts with the Sales History [Database](#) which is defined by the user, along with the level at which Sales History is held. The formats of enquiry are chosen by the user, and a new view of the information may be created quickly and easily without the need for data processing personnel.

Reports may be created via a simple series of prompts, and may be requested on a regular basis, or may be simple ad-hoc enquiries to answer a pressing question.

Relationship to Other Style Applications

The Sales Analysis application makes use of primary data held in the Inventory Management and Sales Order Processing applications within Style.

It is within Inventory Management that details of items are held, including data such as [item](#) type, [item](#) group, division and sub-division.

Inventory Management also contains a [database](#) of codes and descriptions, used to maintain an abbreviated code for such details as [item](#) group, or salesman, together with a meaningful description. The great benefit of the description [database](#) is that it enables a consistent and easily validated use of codes, and also provides for a meaningful description at report or enquiry time.

Customer details are held within the Style Sales Order Processing application, including data such as salesman, territory, and customer class.

Company Profile

As with all Style products, Sales Analysis may be used by a number of companies, each with differing requirements. A profile of each company using the system is maintained, which details such things as the name of the company and the level at which sales history is to be held.

Calendar

To maintain independence from financial or manufacturing time periods, Sales Analysis has its own calendar, which holds the dates on which sales weeks or periods end. This enables Sales Analysis to allocate each sale to the appropriate period, according to its date.

Budgets

[Budgets](#) may be defined within Sales Analysis, and have two main characteristics, a type and a format.

The type is an overall classification, such as [Budget](#), Target or Forecast. The format describes the [attribute](#) or [attributes](#) to which the [budget](#) relates, for example, it is possible to have a Target for Salesman, salesman being a possible [item](#) on the Sales History [Database](#), or a Forecast for Customer Account by [Item](#) Group.

[Budgets](#) are entered by Sales History Period for a type and format previously defined. Spread profiles may be used to aid the creation of [budgets](#), allowing an annual total to be spread over the year's sales periods according to a known pattern.

Sales Analysis reports enable the comparison of [budgeted values](#) with actual sales.

The Sales History Database

Fundamental to Sales Analysis is the Sales History [database](#), designed to enable a high level of tailoring to individual requirements, without programming changes.

When the system is installed, you are able to choose the customer and [item data elements](#) which you wish to hold on the [database](#). In addition to the [item](#) code, customer code and sales period, you may choose six [data elements](#) relating to the Inventory Management [Item](#) Master file, and six relating to the Sales Order Processing Customer Master file. Quantity, cost and sales [value](#) are also held, with provision for four further [values](#).

You may also choose to change the window and report headings for the [data elements](#) held on the [database](#). For example, if you use [item](#) type, to indicate whether an [item](#) is made in or bought out, you can change the heading to say just that. This change is then fully incorporated within the [database](#) itself, allowing full use of utilities, which will print your chosen column headings.

The Sales Analysis [database](#) is held at style level rather than full product (style/colour/size/fit).

Updates and Processing

Sales History Update

Actual sales history is drawn from the Sales Order Processing invoice data. The Sales History Update task takes this data and adds it to the Sales History [database](#), using the calendar to determine the appropriate sales period.

This may be run as often as required, the actual frequency depending upon how up-to-date the sales history needs to be.

Sales history is maintained at style level. A full product Sales History [database](#) is available for creation of your own query reports.

Sales History Refresh

Sales Analysis enables you to refresh customer or [item](#) data on the [database](#) selectively in the event of a change.

For example, if sales regions are re-organised so that customers fall into different regions after the customer data in Sales Order Processing has been updated, it is possible to use the Sales History Refresh task to bring the Sales History [database](#) into line with this re-organisation, and allow analysis to show past sales to customers, within their new regions.

Periodic Updates

Whilst Sales Analysis has no pre-defined month end reports, tasks are provided to allow you to run whatever regular reporting is required.

As you create your own reports, you are prompted to specify that they should be run on a regular basis, for example daily, or at month end. The daily, weekly, period end and year end update tasks select those reports you have requested, and produce them at the appropriate time.

These regular updates also maintain the current period and year, held on the Company Profile.

Enquiries

Sales Analysis provides a powerful enquiry function, which enables you to create a view of any [data element](#) on the [database](#), analysed in terms of any other data [item](#). The [values](#) displayed may also be chosen from the [values](#) on the [database](#), and the time periods may be defined in a variety of different ways.

A new view may be created simply by asking for an analysis which has not previously been used, and the application will then offer to create it.

The Sales Enquiry provides you with four columns of [values](#), chosen by means of a number of formats, created at installation time.

A format specifies the time periods to be displayed, together with the particular [value](#) to be displayed.

For example:

- This period
- Last period
- 3 periods ago
- 4 periods ago
- Value to be shown = Sales Value

Or

- This period
- Last period
- This year
- Last year
- Value to be shown = Quantity

To enquire on sales history, in a chosen format, you must enter two [items](#):

- The data element on which to enquire
- The data element by which to analyse

For example, enquiring on salesman 01 by [item](#) group would show a breakdown by [item](#) group of salesman 01's sales. The enquiry could then be advanced to show the next salesman's sales by [item](#) group, and so forth.

Options are provided to invert the display, in order to show the sales of a selected [item](#) group by all salesmen.

A bar chart function is also provided to provide a graphical representation of the data.

Reports

Sales Analysis contains report generator functions, which enable you to specify your own reports simply and quickly. You can produce summaries at several levels, for example, a report showing [item](#) sales, summarised by salesman; or produce a [ranking](#) of the bestselling [item](#) groups comparing one sales period with another.

A report may be created to run on a regular basis, perhaps at month end, or a report may be used once to answer an ad-hoc enquiry.

In addition to this, there are a number of standard Housekeeping type reports.

Item File Print

This provides a listing of the [items](#) defined within Style Inventory Management, together with their [attributes](#) chosen for inclusion on the Sales History [database](#).

Customer File Print

This provides a listing of the customers defined within Style Sales Order Processing, together with their [attributes](#) chosen for inclusion on the Sales History [database](#).

Report Specification Print

This provides a listing of the specifications of reports defined within Style Sales Analysis.

Sales Report

The Sales Analysis system provides tasks which enable you to run an existing sales report, or to create and optionally run a new or ad-hoc report.

Such is the ease of creating a report that Sales Analysis is particularly adept at providing reports for ad-hoc queries.

A report is created using a series of prompts by means of which you specify the report's sequence, selection and content, and when the report is to be run.

The report specification may be saved, and is then available to be run regularly, or on request.

Ranking Analysis

The [Ranking](#) Analysis task within Sales Analysis is used to sequence or rank elements by the results of a summarised [value](#) and, optionally, make comparisons between one period and another.

Thus you could, for example, choose to rank salesmen by sales [value](#), which would summarise their sales [values](#) in order. You might choose to make a comparison and compare this month's [ranking](#) with last month's, to see what changes have taken place.

The [ranking](#) function may also be made to work at a second level, and rank one element within another, for example, [item](#) group within region, showing the bestselling [item](#) groups for each region.

Utilities

Sales Analysis contains a set of utility functions which are intended for use at system installation time, or under certain special circumstances.

These utilities enable ease of software installation, and continued maintenance.

Prerequisites

This section deals with the steps involved in implementing Style Sales Analysis, from the initial installation to the production of the first enquiries and reports.

Sales Analysis may be installed as an additional module within an existing Style environment, or may be part of a new installation.

The logical prerequisites are the same in both cases.

As with other products, Sales Analysis is supported by System Manager, which must be installed first.

Sales Analysis also requires that Style Inventory Management and Style Sales Order Processing be installed. From Inventory Management it obtains details about the [items](#) which are sold and from Sales Order Processing it obtains details of customers, and invoice details representing sales. Inventory and Sales Order Processing are part of your standard Style application.

In order for Sales Analysis to extract information about sales, the [item](#) details within Inventory Management must be maintained in such a way that the information for analysis is present, for example [item](#) group. Likewise, the customer details required for analysis must also be present within Sales Order Processing, and some invoices must have been printed.

Basic Data

Before any processing can take place within Sales Analysis, some basic details must be set up within the application.

Company Profile

A Company Profile must be created for each company which is to use the application. This contains processing details specific to each company, and also the current year and period, maintained by period end routines.

Calendars

Sales Analysis provides information grouped by sales period, whereas invoices are created as individual dates. In order for invoices to be placed in the appropriate period, a calendar is used.

Calendars must be created before processing starts. If you choose to hold history at a weekly level, calendars should be created for both week and period for all years which you intend to process.

Sales History Time Period Selection

The information shown on the Sales Analysis enquiry is determined by the creation of formats.

These define the time periods and the [values](#) which will be shown, and must be created before any attempt is made to use the enquiry function of Sales Analysis.

A default format 1 is used by the application and therefore this at least must be created.

Database

Central to the Sales Analysis application is its [database](#), which must be defined before processing is to start.

Change Initial Field Descriptions

Within Sales Analysis, [data elements](#) or fields have internal names, which cannot be altered, but also external names by which they are identified to users of the system. The Change Initial Field Descriptions task may be used to step through the [data elements](#), and change the names or descriptions of these in order to suit a particular installation.

Define Database

The [database](#) must be created before processing can begin. You should consider the [data elements](#) which you wish to hold before you create the [database](#).

Budgets

Within Sales Analysis you may choose to maintain [budgets](#), and in reports, compare [budgets](#) with actual sales. You may choose to run the application without [budgets](#) initially and introduce them later. A [budget](#) is defined in terms of a [budget](#) format, and a [budget](#) type.

You may also create spread profiles, which aid [budget](#) entry, if sales fall into a known pattern.

Definition

In order to describe the [data element](#)(s) to which a [budget](#) applies, a format must be created. This also determines the kind of [value](#) to be held, for example, cost [value](#) or sales [value](#).

The [Budget](#) Format task should be used to create the formats you require.

Spread Profiles

The Spread Profiles task enables you to define the pattern of sales over a year, by period. A number of profiles may be created and used to aid [budget](#) entry.

Budget Entry

[Budgets](#) may be entered for a year, against the [data elements](#) defined by the [budget](#) format, for the [values](#) also specified by the format.

Spread profiles may be used to spread an annual total over all the periods in a year.

Sales History

Invoices

Sales Analysis draws its information on sales from data within Sales Order Processing. For processing to start, invoices must have been printed within Sales Order Processing.

Updating Sales Analysis

The Sales History Update task takes printed invoice data and posts the information to the Sales History [database](#). Once posted, the invoices are marked as such and will not be included in subsequent updates. If large volumes of data are involved, this function may take some time to complete.

Enquiry

The Sales Enquiry task will prompt you to enter a [data element](#) on which to enquire, and to select a [data element](#) by which to analyse. The first time a new enquiry combination is selected, the system will build summary data but thereafter the enquiry will be performed straight away.

Reporting

Sales Analysis enables you to create your own Sales reports and [Ranking](#) Analysis reports.

The Reports Specifications and [Ranking](#) Analysis Specification tasks allow you to define reports quickly and easily. They may be created and run as part of the specification maintenance, or they may be selected by name at a later time, or included in the regular update runs.

Miscellaneous

Library for User-created Objects

Sales Analysis creates the system program and file objects during its execution. These must be directed to a specific [library](#). A data area called SAUSRLIB contains the name of the [library](#) in which these objects will be placed. The default supplied by the system will be the Sales Analysis files [library](#).

Bar Chart Characters and Colours

The characters to be used in the Enquiry bar chart are contained in the data area SABARCHARS, in hexadecimal form, and the display [attributes](#) are held in the data area SABARCHCOL. These both contain default [values](#), which you may change to tailor the bar chart display.

Sales Analysis Setup and Maintenance

Sales Analysis draws on data contained in other applications, in addition to data defined within Sales Analysis itself.

From Inventory Management, Sales Analysis uses data from the [Item](#) Master file, and the [Descriptions file](#).

From Sales Order Processing, Sales Analysis uses data from the Customer Master file.

The following data is set up within the Sales Analysis application:

- Company Profile, which holds specific details about each Sales Analysis company
- Calendars, to convert dates to Sales Analysis periods
- Budget Formats and Budgets
- Report and Ranking Analysis Specifications
- Spread Profiles
- Sales History Time Periods

Relationship to Other Applications

Sales Analysis uses primary data held in Inventory Management and Sales Order Processing.

You can use Sales Analysis data in the Forecasting module. Forecasting takes the sales quantities as demand on which to base the generated yearly forecasts. If you are going to implement Forecasting and use Sales Analysis for demand, you should take the following points into account:

- Forecasting uses three user-defined data elements for each item: stockroom code, minor item group and quantity.
- Sales Analysis can hold quantities in the Inventory item master issue unit of measure or the item stockroom issue unit of measure. Distribution Requirements Planning processes forecasts in the Inventory item master issue unit. If you plan to transfer the generated forecasts to the Distribution Requirements Planning module, you should hold Sales Analysis demand quantities in the Inventory item master issue unit.

Prerequisites

The modules that are prerequisite for the operation of Sales Analysis are:

- Inventory Management
- Sales Order Processing
- System Manager

You can install Sales Analysis as an additional module within an existing environment, or as part of a new installation. The logical prerequisites are the same in both cases.

As with other System21 products, Sales Analysis is supported by System Manager, which must be installed first.

You need to install both Inventory Management and Sales Order Processing before Sales Analysis. Sales Analysis uses details from Inventory about [items](#) and customer and invoice details (which represent sales) from Sales Order Processing.

In order for Sales Analysis to extract sales information, the [item](#) details from Inventory must be maintained so that the information for analysis is present. The customer details required for analysis must be present within Sales Order Processing and some invoices must have been printed.

To print some of the reports contained in Sales Analysis, you need to use printers that support 198 character line widths.

Application Configuration

Before you can use Sales Analysis, you have to configure the application by providing the software with information on your business procedures.

These details can be split into five areas:

- Basic data
- Database
- Budgets
- Sales history
- Technical configuration

Entering Basic Data

To initialise the module, you must enter the following basic data:

- Company profile

You must create a company profile for each company that will use Sales Analysis. This contains processing details specific to each company, and the current year and period, maintained by period end routines.

- Calendars

Sales Analysis provides information grouped by sales period, whereas invoices are created for individual dates. In order for invoices to be placed in the appropriate period, a calendar is used.

You must create calendars before you start processing. If you choose to hold history at a weekly level, you should create both weekly and period calendars for all years that you want to process.

Caution: We strongly recommend that you align your Sales Analysis, Inventory Management and Forecasting periods, as failure to do so will affect the accuracy of any reports and forecasts produced.

Sales history time period selection

The information shown on the Sales Analysis enquiry is determined by formats.

- **Formats**

Formats define the time periods and the values that will be shown, and must be created before you attempt to use the enquiry task in Sales Analysis. The module uses the default format 1, and therefore you must create this at least.

Database

The Sales History [database](#) is central to Sales Analysis. You must define this before you begin processing.

- **Change initial field descriptions**

Within Sales Analysis, data elements or fields have internal names which cannot be altered, and external names by which they are identified to the user. You can use the Change Initial Field Descriptions task to step through the data elements, and change the external names or descriptions of these in order to suit your business and your users.

- **Define database**

You should consider the data elements that you want to hold before you create the database.

Budgets

You maintain budgets in Sales Analysis, and compare planned and actual sales in your reports. You can run Sales Analysis without budgets initially and introduce them later, if you want. A budget is defined with a budget format and a budget type.

- **Definition**

To describe the data elements to which a budget applies, you must create a format. This also determines the kind of value to be held, for example, cost value or sales value. A budget type allows you to create several sets of values against the same budget format. Set up budget types in the Inventory Descriptions file.

- **Spread Profiles**

Spread profiles help you define the pattern of sales over a year, by period. You can create a number of profiles to aid budget entry.

- **Budget Entry**

You can enter budgets for a year, against the data elements defined by the budget format.

Sales History

Sales Analysis uses sales data from Sales Order Processing. To begin processing in Sales Analysis you must already have printed sales invoices.

- **Updating Sales Analysis**

The Sales History Update task takes printed invoice data and posts the information to the Sales History database. Once posted, the invoices are marked so that they are not included in subsequent updates. If large volumes of data are involved, this task may take some time to complete.

- **Enquiry**

The Sales Enquiry task will prompt you to enter a data element on which to enquire, and a data element by which to analyse it. The first time you select a new enquiry combination, the software will build summary data, but after that, the enquiry will be performed straight away.

- **Reporting**

You can create your own sales reports and ranking analysis reports. You can use the Reports Specifications and Ranking Analysis Specification tasks to define reports.

Technical Configuration

- Sales Analysis creates program and file objects during its execution. These must be directed to a specific library. A data area called SAUSRLIB contains the name of the library in which these objects will be placed. The default supplied with the software is the files library containing the Sales Analysis files.
- The characters to be used in the enquiry bar chart are contained in the data area SABARCHARS, in hexadecimal, and the display attributes are held in the data area SABARCHCOL. These both contain default values, which you can change to tailor the bar chart display.

Sales Analysis Company Profile [4/STCO]

Use this task to set up some of the default values used in Sales Analysis reports and enquiries.

Maintain Company Profile Amendment Window

To display this window, select the Sales Analysis Company Profile task.

Use this window to maintain company specific processing options. If you are maintaining an existing company, the current details will be displayed. For a new company, default [values](#) will be shown.

If you are creating a new Sales Analysis company and a Sales Order Processing company of the same name already exists, the Sales Analysis company name defaults to the name of the existing Sales Order Processing company.

Fields

Company Code

This field displays the company code in which you are currently working. You must set the software to use the company you want to maintain before you select the task.

Company Name

The company name is displayed, but can be amended.

SOP System

Select one of the following:

JBA (1) - To use System21 Sales Order Processing

MAAPICS (2) - To use MAAPICS

Other (3) - If you use another Sales Order Processing application

SOP Company

Enter the Sales Order Processing company with which you want this Sales Analysis company to interface. The software will extract data from this company, to create reports.

This field defaults to the Sales Analysis company but can be overridden.

Inventory System

Select one of the following:

JBA (1) - To use System21 Inventory Management

MAAPICS (2) - To use MAAPICS

Other (3) - If you use another Inventory Management application

Inventory Company

Enter the Inventory Management company with which you want this Sales Analysis company to interface. The software will extract data from this company, to create reports.

This field defaults to the Sales Analysis company but can be overridden.

Current Year

Enter the current year. This should be entered at system installation time, but will be maintained by the software during the last Period Update run of the year.

Current Period

Enter the current sales period. This should be entered at system installation time, but will be maintained by the Period Update task.

Current Week

Enter the current week. This should be entered at system installation time, but will be maintained by the Weekly Update task.

No. Periods This Year

Enter the number of periods in the current year.

Note: Enter **12** if your Sales Periods are calendar months or **13** if they are 4-week periods.

No. Weeks This Year

Enter the number of weeks in the current year (either **52** or **53**).

No. Weeks Last Year

Enter the number of weeks in the previous year (either **52** or **53**).

Lowest Level of History

Select one of the following:

Period (1) - To hold sales data at period level

Your sales reports will only show period end and year end update figures.

Week (2) - To hold sales data at a weekly level

Your sales reports will show weekly, period end and year end figures.

Margin

Select one of the following:

Sales (1) - To express margins as a percentage of sales [values](#)

Cost (2) - To express margins as a percentage of cost [values](#)

Invoice History Source

Select one of the following to use as the source of invoice history:

OE (1) - To base on the Sales Order Entry module, OE

AI (2) - To base on the EDI module, AI

Functions

Delete (F11)

Use this to delete the company profile information.

Press Enter to save the information and leave the task.

Styles [1/STSAM]

You use this task to maintain style information. This is the same task as **5/STINM**. Please refer to the Maintenance chapter of the Style Inventory Management product guide for further information.

Customer Maintenance [2/STSAM]

You use this task to maintain customer information. This is the same task as **2/STOEM**. Please refer to the Maintenance chapter of the Style Sales Order Processing product guide for further information.

Descriptions [3/STSAM]

You use this task to maintain the Inventory [Descriptions file](#). This is the same task as **1/STINM**. Please refer to the Maintenance chapter of the Style Inventory Management product guide for further information.

Calendar [4/STSAM]

Sales Analysis has its own calendar. You use this to maintain Sales Analysis periods that are independent from your Financial, Inventory and Manufacturing periods.

The Sales Analysis calendar translates a date into a sales year, period and week, so that you can allocate each sale to its appropriate Sales Analysis period.

You enter the year for which you want to maintain the calendar and choose whether you want to maintain weeks or periods for that year. If, on the Sales Analysis Company Profile, you defined the Lowest Level of History as Period, you need only maintain periods. If you defined the Lowest Level of History as Week, you need to maintain weeks and periods for this calendar.

Note: You can access Calendar Maintenance from the Sales History Update task. If you are using the Sales History Update task, a batch job updates the Sales History [database](#) with details of invoices from Sales Order Processing.

Note: You must enter a calendar that includes all dates you expect Sales Analysis to encounter. If you hold details at weekly level, you must create a calendar for both period and week end dates.

Calendar Maintenance Selection Window

To display this window, select the Calendar task.

Use this window to select the year and type for the calendar you want to maintain.

Fields

Year

Enter the year for which you want to maintain the calendar.

Type

Select one of the following:

Period (1) - To maintain end dates for periods

Week (2) - To maintain end dates for weeks

Press Enter to display the Number of Periods/Weeks to Maintain pop-up.

Number of Periods/Weeks to Maintain Pop-up

To display this pop-up, enter a year and type and press Enter on the Calendar Maintenance Selection window.

Use this pop-up to specify the number of periods or weeks. The default displayed is obtained from the company profile.

Fields

Enter the Number of Periods/Weeks for the Year You Are Maintaining

Enter the number required or leave the default [value](#) unchanged.

Press Enter to display the Calendar Maintenance Details window.

Calendar Maintenance Details Window

To display this window, press Enter on the Number of Periods/Weeks to Maintain pop-up.

Use this window to maintain the end dates for the selected year and calendar type. The number of periods or weeks displayed is obtained from the previous pop-up.

Fields

Year

The selected year is displayed and cannot be overridden.

Type

The selected type is displayed and cannot be overridden.

Period or Week

The period or week number is displayed.

End Date

Enter or select the calendar date on which the period or week ends.

If you are creating a new calendar, you can enter just the date on which the first period, or week, ends and press Enter; the software will generate the remaining end dates. You can accept these or change them if required.

Elapsed Days

Enter the number of elapsed days for each time period. This data is not updated by the software, and can be maintained manually for reference purposes.

Selling Days

Enter the number of selling days for each time period. This data is not maintained by the software, and can be maintained manually for reference purposes.

Select **Update (F8)** to update the calendar information.

Budget Formats [5/STSAM]

Use this task to choose which customer [attributes](#), [item attributes](#) and [budget values](#) to include in your sales [budgets](#).

You can create any number of [budget](#) formats and use them, along with [budget](#) types and spread profiles, to create sales [budgets](#).

You need to bear in mind that the level of detail you include in your [budget](#) formats has a bearing on the amount of data you will have to enter when you create sales [budgets](#).

If, for example, you create a [budget](#) format for salespeople and [item](#) class, and there are 10 salespeople in your organisation, and you classify your [items](#) in 10 [item](#) classes, you will potentially have to enter 100 sets of data to cover every salesperson and [item](#) class combination.

You should be aware that once a [budget](#) format has been used to create a [budget](#) it cannot be altered.

Sales Budget Definition Company Selection Window

To display this window, select the [Budget](#) Formats task.

Use this window to enter the company for which you want to maintain [budget](#) formats.

Fields

Company Number

Enter the Sales Analysis company for which you want to maintain [budget](#) formats.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Press Enter to display the Budget Format Definition Selection window.

Sales Budget Definition Format Selection Window

To display this window, enter or select a Sales Analysis company and then press Enter on the Sales Budget Definition Company Selection window.

Use this window to enter the [budget](#) format you want to maintain.

Fields

Format

Enter a two-character code for the [budget](#) format you want to create or maintain.

Alternatively, use the prompt facility to select from the Budget Format Selection pop-up.

Press Enter to display the Sales Budget Definition Budget Level window.

Sales Budget Definition Budget Level Window

To display this window, enter or select a [budget](#) code and then press Enter on the Sales Budget Definition Format Selection window.

Use this window to choose the customer-related and [item](#)-related [attributes](#) you want to include in the format. You can choose only one customer-related [attribute](#) and one [item](#)-related [attribute](#), but you do not have to choose from both groups of [attributes](#).

For example, you could select Salesman to create a [budget](#) format that will show the performance of your salespeople. If you were to select [Item](#) Class also, the format would show how your salespeople performed when selling [items](#) from a particular [item](#) class.

Fields

Format

The selected format is displayed.

Customer Related

Enter **1** against the [attribute](#) you want to include in this [budget](#) format. You can only select one.

Item Related

Enter **1** against the [attribute](#) you want to include in this [budget](#) format. You can only select one.

Press Enter to display the Sales Budget Definition Budget Values window.

Sales Budget Definition Budget Values Window

To display this window, select the customer and [item attributes](#) required and then press Enter on the Sales [Budget Attributes](#) Definition window.

Use this window to select up to four of the displayed [value](#)-related [attributes](#). These should be the [values](#) that you want to compare with actual sales [values](#) in your Sales Analysis reports.

So, for example, if you choose Quantity and Margin, any [budgets](#) you create using this format will show the profit margin for any given sales quantity.

Fields**Format**

The selected format is displayed.

Budgeted Items

Enter **1** against each [attribute](#) you want to use. You can select up to four.

Press Enter to create the [budget](#) format and to re-display the Sales Budget Definition Selection window.

Spread Profiles [6/STSAM]

Use this task to maintain spread profiles. Spread profiles are used to spread an annual sales [budget](#) over the periods of a year.

Spread profiles simplify data entry when you are setting up sales [budgets](#). They allow you to distribute annual sales figures automatically across the periods of a year, according to a pre-determined pattern.

Spread profiles are particularly useful if your sales are subject to seasonal variations. You can enter your total annual sales figures into a [budget](#) and the spread profile shows you at a glance what you need to achieve on a month-by-month basis.

Spread Profiles Maintenance Company Selection Window

To display this window, select the Spread Profiles task.

Use this window to enter the company for which you want to maintain spread profiles.

Fields

Company Number

Enter the Sales Analysis company for which you want to maintain spread profiles.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Press Enter to display the Spread Profiles Selection window.

Maintain Spread Profiles Selection Window

To display this window, enter or select a company and then press Enter on the Spread Profiles Maintenance Company Selection window.

Use this window to enter the spread profile to be created or maintained.

Fields

Profile Code

This field displays existing profile codes.

Description

The text description is displayed.

Enter the Code of the Profile to be Maintained

Enter code, using up to 3 characters, for the spread profile you want to create or maintain.

Press Enter to display the Maintain Spread Profiles Detail window.

Maintain Spread Profiles Detail Window

To display this window, enter a profile and then press Enter on the Maintain Spread Profiles Selection window.

Use this window to maintain the percentage of the total year's [budgeted](#) sales, for each period.

Fields

Profile Code

The profile code is displayed.

Period

The period is displayed.

Period %

Enter the percentage of total demand sales you want to [budget](#) for the period. The percentages for all the periods must add up to 100%.

Profile Description

You must enter a description of the profile, using up to 30 characters.

Functions**Delete (F11)**

Use this to delete the profile. No confirmation is required.

Press Enter to create or update the profile.

Budgets [7/STSAM]

Use this task to create sales [budgets](#). Sales [budgets](#) are used in Sales Analysis reports, to compare planned and actual sales figures.

You do not have to set up [budgets](#) when you first set up Sales Analysis. You can run Sales Analysis without [budgets](#) initially, and introduce them later, if required.

There are three stages to setting up a working [budget](#):

- Create budget formats to determine which customer and item attributes and which budget values are included.
- Create budget types, which allow you to create several sets of values against the same budget format. Budget types are set up in the Inventory Descriptions file, under major type BUDG.
- Create spread profiles, which allow you to define sales patterns for a year. These spread profiles can be used to spread the annual budget value across the year.

To create a [budget](#):

- Choose a budget format.
- Choose a budget type.
- Choose a spread profile (optional).
- Enter the required budget values.

You can also create a new [budget](#) by basing it on an existing one.

Maintain Sales Budgets Format Selection Window

To display this window, select the Budgets task.

Use this window to select the [budget](#) format and [budget](#) type for the [budget](#) you want to create or maintain.

Fields

Format

Enter a [budget](#) format. Budget formats are set up using the Budget Formats task.

Alternatively, use the prompt facility to select from the Budget Format Selection pop-up.

Type

Enter a [budget](#) type. Budget types are set up in the Inventory [Descriptions file](#), under major type BUDG.

Alternatively, use the prompt facility to select from the BUDG Budget Types pop-up.

Press Enter to display Maintain Sales Budgets Year Selection window.

Maintain Sales Budgets Year Selection Window

To display this window, enter or select a [budget](#) format and budget type and then press Enter on the Maintain Sales Budgets Format Selection window.

Use this window to enter the year to which the budget relates, and to enter [values](#) for the customer-related and [item](#)-related [attributes](#) of the budget format.

Note: *The fields displayed depend on the attributes selected for this budget format.*

Fields

Year

Enter the year to which the [budget](#) relates.

Customer-related Attribute

Note: *The field heading depends on the [attribute](#) selected for this [budget](#) format.*

Enter a [value](#) for the customer-related [attribute](#) of the [budget](#) format.

You can use the prompt facility on this field.

Item-related Attribute

Note: *The field heading depends on the [attribute](#) selected for this [budget](#) format.*

Enter a [value](#) for the [item](#)-related [attribute](#) of the [budget](#) format.

You can use the prompt facility on this field.

Press Enter to display Maintain Sales Budgets Detail window.

Maintain Sales Budgets Detail Window

To display this window, press Enter on the Maintain Sales Budgets Year Selection window.

Use this window to enter [values](#) for the [budget](#) you are maintaining.

There are two different ways you can enter data on this window:

- 1 Manually enter [values](#) in all of the Budgeted Item fields, for each period. When you press Enter, the software calculates the totals for the year.
- 2 Use a spread profile. You enter the spread profile you want to use and the expected total quantities of your [budgeted items](#) for the year. When you press Enter, the software calculates the quantities for each individual period, based on the spread in the spread profile.

Note: *The fields displayed are determined by the selected [budget](#) format.*

Fields

Year

The selected year is displayed.

Customer Attribute

The selected customer [attribute value](#) is displayed.

Item Attribute

The selected [item attribute value](#) is displayed.

Spread Profile (Untitled)

Enter the spread profile if required.

Total (Untitled)

Enter the total, if you are using a spread profile.

Cost Value

Enter the cost [value](#) for each period. Enter these fields manually if you are not using a spread profile.

Select **Update (F8)** to update the values on the Budget file.

Report Specifications [8/STSAM]

Use this task to set up Sales Analysis reports and define the format in which they are printed. You choose what to include in the report from the [attributes](#) in your Sales History [database](#). You can select up to five from the customer-related and [item](#)-related attributes, and four invoice [values](#).

The invoice [values](#) can be totalled for either of the following:

- Current Week and Period to Date
- Current Period and Year to Date

For example, a typical Sales Analysis report might contain invoice [values](#) such as Quantity, Cost Value, Goods Value and Percentage Margin. These could be listed, for example, for the Current Period and Year to Date, for each [item](#), sold by each salesperson.

You can also include pre-defined [budgets](#) for the same time span, to compare your planned and actual sales figures.

The report will show totals for each invoice [value](#) and finally a grand total for the whole report.

There are three stages to producing a Sales Analysis report:

- Create a report specification.
- System21 compiles a program from the specification.
- System21 runs the program to produce the report.

System21 performs the last two stages when you produce the report for the first time.

You can produce Sales Analysis reports:

- At the time you create the report specification
- During day end, week end, period end and year end processing updates
- On an ad-hoc basis

Maintain Report Specifications Selection Window

To display this window, select the Report Specifications task.

Use this window to enter the reference for the report you want to maintain.

Fields

Report Reference

Enter the name of the existing report you want to maintain, or a new report you want to create. The name of a new report must begin with an alphabetic character, and must be no longer than eight characters.

Alternatively, use the prompt facility to select an existing report from the Report Selection pop-up.

You can base a new report on an existing one. Enter a report reference for the new report and then select **Based On (F10)** to display a list of existing reports.

Functions

Based On (F10)

Use this to select an existing report from which to create a new report.

Press Enter to display the Maintain Report Specifications Sequence window.

Maintain Report Specifications Sequence Window

To display this window, enter or select a report reference and then press Enter on the Maintain Report Specifications Selection window.

You use this window to:

- Enter a name for the report
- Specify which attributes to include in the report
- Decide how these attributes are sequenced
- Decide how the data is printed on the report
- Include any budgets you require

You will need to use **Page Up** and **Page Down** to display all of the fields available for selection.

Fields

Report Reference

The selected report reference is displayed.

Report Name

You can enter up to 50 characters of text for the report description.

Sequence

The report sequence determines which [attributes](#) are included in the report. You can select up to five by entering a number from 1 to 5 against them.

1 - Identifies the lowest level of detail in the report.

2 to 5 - Identify four levels of sub-totals.

If you want to generate a report with several levels, which shows, for example, totals for each [item](#) sold by each salesman, you need to enter **1** in the Item Sequence field, and **2** in the Salesman Sequence field.

Descend

Check this to sort [attributes](#) into descending order. By default, the attributes are sorted in ascending order.

New Page

Check this to indicate that you want a page break in your report when a particular [attribute value](#) changes.

Budget

Check this to include [budget](#) figures for the [attribute](#) and compare them to your actual sales figures.

***Note:** You can include [budget](#) figures for any [attribute](#), as long as a valid budget exists for that attribute, for the current year.*

Functions**Budget Search (F4)**

Use this to display a list of budgets already defined. Select an existing [budget](#) to fill the [attributes](#) selected in that budget automatically.

Delete Specification (F11)

Use this to delete a specification.

Press Enter to display the Maintain Report Specifications Records window.

Maintain Report Specifications Records Window

To display this window, enter the sequence details and then press Enter on the Maintain Report Specifications Sequence window.

Use this window to set the selection criteria to be used when printing the report. If you leave all of the fields blank, all records that satisfy the report criteria will be printed.

You will need to use **Page Up** and **Page Down** to display all of the fields available for selection.

Fields**Report Reference**

The selected report reference is displayed.

Report Name

The name of the selected report is displayed.

No. Records to Print

Enter the number of records you want to print or enter **0** to print all records.

From

Enter a From [value](#) from which to print. Leave this field blank to print all records.

To

Enter a To [value](#) to which to print. Leave this field blank to print all records.

Press Enter to display the Maintain Report Specifications Exit window.

Maintain Report Specifications Exit Window

To display this window, press Enter on the Maintain Report Specifications Records window.

Use this window to select the [values](#) to print on the Sales Analysis report, and when to print the report.

Fields

Save Specifications or Delete after Next Print

Select one of the following:

Save (1) - To save the report specification after it has been printed

Delete (2) - To delete the report specification after it has been printed

Produce at End Of

Use this group of fields to determine when the report will be printed. The report is then submitted when the appropriate periodic update is run.

Use these checkboxes as follows:

Day

Unchecked - Not to produce this report when day end processing is performed

Checked - To produce this report each time day end processing is performed

Week

Unchecked - Not to produce this report when week end processing is performed

Checked - To produce this report each time week end processing is performed

Period

Unchecked - Not to produce this report when period end processing is performed

Checked - To produce this report each time period end processing is performed

Year

Unchecked - Not to produce this report when year end processing is performed

Checked - To produce this report each time year end processing is performed

OR Ad-hoc

Unchecked - Not to produce the report on an ad-hoc basis

Checked - To produce the report on an ad-hoc basis (as and when required)

Format (Untitled)

Select one of the following for each of the above:

YTD (1) - To include only Year to Date figures

PTD (2) - To include only Period to Date figures

Both (3) - To include both Year to Date and Period to Date figures

Note: You will only be able to include Period to Date figures in your Reports if you defined your Lowest Level of History as Week on your Sales Analysis company profile.

Submit Report Now

Use this checkbox as follows:

Unchecked - To print the report later

Checked - To submit the report for printing immediately

Budget Type

Note: This field will only be displayed if you check a [budget](#) field on the Maintain Report Specifications Sequence window.

The [budget](#) type associated with the customer or [item attributes](#) selected is displayed, but can be overridden.

Budget Format

Note: This field will only be displayed if you check a [budget](#) field on the Maintain Report Specifications Sequence window.

The [budget](#) format associated with the customer or [item attributes](#) selected is displayed.

Value Selection

Select up to four [values](#) for inclusion in the report by entering 1 to 4 against the following [values](#):

Cost Value

Quantity

Goods Value

Margin

Margin %

Note: The number you place in the field determines the column in which that [value](#) is printed on the report.

Print Details

In the fields below, if you are not using budgets, enter 1 against the relevant field to print actuals for this year, last year or both. If you are using budget values, variance and variance percentage, values are included by entering 1 against them. You must choose at least one value.

This Year

Actual

Enter one of the following:

0 - Not to include actual sales figures for this year

1 - To include actual sales figures for this year

Budget

Enter one of the following:

0 - Not to include [budget](#) figures for this year

1 - To include [budget](#) figures for this year

Variance

Enter one of the following:

0 - Not to print any variance between actual and [budget](#) figures as a [value](#) for this year

1 - To print any variance between actual and [budget](#) figures as a [value](#) for this year

Var %

Enter one of the following:

0 - Not to print any variance between actual and [budget](#) figures as a percentage for this year

1 - To print any variance between actual and [budget](#) figures as a percentage for this year

Last Year

Actual

Enter one of the following:

0 - Not to include actual sales figures for last year

1 - To include actual sales figures for last year

Budget

Enter one of the following:

0 - Not to include [budget](#) figures for last year

1 - To include [budget](#) figures for last year

Variance

Enter one of the following:

0 - Not to print any variance between actual and [budget](#) figures as a [value](#) for last year

1 - To print any variance between actual and [budget](#) figures as a [value](#) for last year

Var %

Enter one of the following:

0 - Not to print any variance between actual and [budget](#) figures as a percentage for last year

1 - To print any variance between actual and [budget](#) figures as a percentage for last year

Press Enter to confirm the entries, create the report and re-display the Maintain Report Specifications Selection window.

Ranking Analysis Specification [9/STSAM]

Use this task to set up your [Ranking](#) Analysis reports and define the format in which they are printed.

[Ranking](#) Analysis reports are used to rank a selected customer or [item attribute](#) based on a summarised invoice [value](#), over a selected time period.

For example, a simple [Ranking](#) Analysis report might:

- Rank all salespeople
- On the basis of sales quantity
- Over the first six months of the year

You can create more sophisticated [Ranking](#) Analysis reports by selecting a second customer or [item attribute](#), which is ranked within the first.

This type of report could show, for example:

- The best five items
- For each salesperson
- Ranked in terms of sales quantity
- Over the first six months of the year

In both types of report, you can choose to compare the results of the analysis with the same time period from last year. If you do this, the invoice [value](#) is totalled over both time periods and the selected customer or [item attribute](#) is ranked on the difference between the two figures.

There are three stages to producing a Ranking Analysis report:

- Create a report specification.
- System21 compiles a program from the specification.
- System21 runs the program to produce the report.

System21 performs the last two stages when you produce the report for the first time.

You can produce Ranking Analysis reports:

- At the time you create the report specification
- During day end, week end, period end and year end processing updates
- On an ad-hoc basis

Maintain Ranking Analysis Specifications Selection Window

To display this window, select the Ranking Analysis Specification task.

Use this window to select the name of the report you want to create or maintain.

Fields

Report Reference

Enter the name of the report you want to create or maintain. A report name must start with an alphabetic character, and be a maximum of eight characters long, and may contain numbers after the initial letter.

Alternatively, use the prompt facility to select from the Ranking Analysis Specification Selection pop-up.

If you are creating a new report, you can select **Based On (F10)** to display a list of existing reports on which to base the new one.

Functions

Based On (F10)

Use this to select an existing report on which to base a new one.

Press Enter to display the Maintain Ranking Analysis Major and Minor Level window.

Maintain Ranking Analysis Major and Minor Level Window

To display this window, enter or select a report reference and then press Enter on the Maintain Ranking Analysis Selection window.

Use this window to enter a name for the report specification and choose what customer and [item](#) information to include in the report.

If you only specify a major level, the report will rank that [attribute](#) according to the invoice [value](#) you select on the next window.

If you select a minor level, the report ranks this minor level attribute according to the chosen invoice value, within the major level attribute.

For example, you could create a report that ranks all items sold by each sales representative according to the goods value of sales made. To do this, select Salesman as the major level and select Item as the minor level.

Note: *The selection criteria available on this window depend on those chosen when you define your Sales History [database](#).*

Fields

Report Reference

The selected report reference is displayed.

Report Name

You must enter up to 50 characters of text for the report description.

Major Level

Enter **1** against an [attribute](#) to select it as the major level for [ranking](#).

No. Records to Print

Enter the number of records to print. Leave this field blank to print all records.

Major Level Selection From/To

Enter the range of major levels to include.

Where available, you can use the prompt facility on these fields.

Minor Level

Enter **1** against an [attribute](#) to select it as the minor level. This field will then be ranked within the major level.

Press Enter to display the Maintain Ranking Analysis Specifications Time Period and Ranking window.

Maintain Ranking Analysis Specifications Time Period and Ranking Window

To display this window, select the required level details and then press Enter on the Maintain Ranking Analysis Major and Minor Level window.

Use this window to specify the time periods for which the report is to be produced, and the invoice [value](#) to be used for [ranking](#).

Fields**Report Reference**

The selected report reference is displayed.

Report Name

The name of the selected report is displayed.

Time Period**FROM/TO Year**

Enter the year range for the report.

FROM/TO Period

Enter the period range for the report.

FROM/TO Week

Enter the period range for the report.

Note: *If history is held at weekly level, enter the year, period and week,*

Compared With**FROM/TO Year**

Enter the year range with which to compare the time period.

If no comparison is being made, leave these fields blank.

FROM/TO Period

Enter the period range with which to compare the time period.

If no comparison is being made, leave these fields blank.

FROM/TO Week

Enter the week range with which to compare the time period.

If no comparison is being made, leave these fields blank.

Ranking On

You can rank the following:

- Cost Value
- Quantity
- Goods Value
- Margin

Use this group of fields to make selections for the invoice [value](#). This invoice value will be totalled for the selected time period.

Asc/Dsc

Enter one of the following:

- 1 - To rank the results in ascending order
- 2 - To rank the results in descending order

Selection From/To

Enter the range of upper and lower [ranking](#) limits.

Difference % Or Value

Enter one of the following:

- 1 - To express the difference between compared time periods as a percentage
- 2 - To express the difference between compared time periods as a [value](#)

Print

Enter 1 to print the result on the report.

Press Enter to display the Maintain Ranking Analysis Specifications Exit window.

Maintain Ranking Analysis Specifications Exit Window

To display this window, press Enter on the Maintain Ranking Analysis Specifications Time Period and Ranking window.

Use this window to specify when a Ranking Analysis report is to be produced.

Fields

Save Specifications

Select one of the following:

Save (1) - To save the report specification for further use

Delete after next print (2) - To delete the specification after the report is printed

Produce at End Of

Use this group of fields to determine when the report will be printed. The report is then submitted when the appropriate periodic update is run.

Use these checkboxes as follows:

Day

Unchecked - Not to produce this report when day end processing is performed

Checked - To produce this report each time day end processing is performed

Week

Unchecked - Not to produce this report when week end processing is performed

Checked - To produce this report each time week end processing is performed

Period

Unchecked - Not to produce this report when period end processing is performed

Checked - To produce this report each time period end processing is performed

Year

Unchecked - Not to produce this report when year end processing is performed

Checked - To produce this report each time year end processing is performed

OR Ad-hoc

Unchecked - Not to produce the report on an ad-hoc basis

Checked - To produce the report on an ad-hoc basis (as and when required)

Submit Report Now

Use this checkbox as follows:

Unchecked - Not to submit the report now

Checked - To submit the report for printing now

Press Enter to save the report and to re-display the Maintain [Ranking](#) Analysis Selection window.

Sales History Time Period Selection [10/STSAM]

Use this task to maintain the formats used by your Sales Analysis enquiries. You define the time intervals, and the invoice [value](#) displayed by the enquiry.

Sales Analysis enquiries display sales figures, for four time intervals, for a selected customer or [item attribute](#), analysed by a second customer or item attribute. You can also display any invoice value on the enquiry.

The customer and item attributes and invoice value are chosen from those included in the Sales History [Database](#).

You can create up to 36 enquiry formats for each Sales Analysis company.

Sales History Time Period Company Selection Window

To display this window, select the Sales History Time Period Sel. task.

Use this window to select the company for which you want to set up or maintain enquiry formats.

Fields

Company Number

Enter the company for which you want to maintain enquiry formats.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Press Enter to display the Sales History Enquiry Time Periods Selection window.

Sales History Time Periods Selection Window

To display this window, enter or select a company and then press Enter on the Sales History Time Period Company Selection window.

Use this window to enter the enquiry format to be created or maintained.

Fields

Enquiry Format

Enter a single character code for the enquiry format.

Alternatively, use the prompt facility to select from the Time Period Format Selection pop-up.

Note: Format 1 is mandatory; other format codes must be in the range 1-9 or A-Z.

Press Enter to display the Sales History Enquiry Time Period Details window.

Sales History Enquiry Time Period Details Window

To display this window, enter or select an enquiry format and then press Enter on the Sales History Enquiry Time Periods Selection window.

Use this window to define the time periods and the invoice [value](#) for the enquiry.

Example

If you want to create an enquiry format to display sales quantities for the current calendar period, and the previous three periods:

- Enter **4** in each of the Period Type fields to indicate sales calendar periods.
- Leave Ago Column 1 **blank** to signify the current calendar period. Sales figures for the current period will then be displayed in column 1 of the enquiry.
- Enter **01** in Ago Column 2 to signify the previous calendar period.
- Enter **02** in Ago Column 3.
- Enter **03** in Ago Column 4.
- Enter **1** in the Quantity field to display sales quantities for the specified calendar periods.

Sales Analysis enquiries produced with this format will display total sales quantities for the current calendar period and the previous three calendar periods.

Fields

Enquiry Format

The selected enquiry format is displayed.

Ago

Enter a [value](#) to define the period lag for values displayed in each column.

If you leave a column **blank**, this column on the report will display figures for the current period.

If you enter **01**, the column will display figures for one period ago. **02** will indicate two periods ago and so on.

Period Type

Select one of the following:

Year (1) - For the enquiry to show sales quantities for the current year and the previous three years

Moving Annual (2) - For the enquiry to show a moving annual total for the current year and the preceding three years

A moving annual total is the total for the year from the current period of the previous year, to the current period of this year. For example, if the current period is eight and the current year is 2006, Column 1 will display sales figures from period eight of 2003, to period seven of 2006. Column 2 will display sales figures from period eight of 2002, to period seven of 2003, and so

on. If you were to run this enquiry again in period nine, Column 1 would display sales figures from period nine of 2003, to period eight of 2006.

Week (3) - For the enquiry to show sales quantities for the current week and the previous three weeks

Period (4) - For the enquiry to show sales quantities for the current period and the previous three periods

You can mix these [values](#) if you want to. For example, you could create an enquiry format that shows sales figures for the current year, the current week and the previous two periods.

Default Value

Enter **1** in one of the following to select it as the enquiry default:

Cost Value

Quantity

Goods Value

Margin

Press Enter to save the enquiry format and to re-display the Sales History Time Periods Selection window.

Create New Budget [11/STSAM]

Use this task to create a new [budget](#) based on an existing one. You can incorporate a percentage change by which to increase, or decrease, the old budget. In this way, you can incorporate all of the details of the old budget without the need for lengthy re-calculations.

Create New Budget Company Selection Window

To display this window, select the Create New Budget task.

Use this window to select the company for which you want to create the new [budget](#).

Fields

Company Number

Enter the company for which you want to set up a new [budget](#).

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Enter or select a company and then press Enter to display the Create New Budget Format Selection window.

Create New Budget Format Selection Window

To display this window, enter or select a company and then press Enter on the Create New Budget Company Selection window.

Use this window to define the new [budget](#) in terms of the existing budget on which you want to base it.

Fields

Old Format

Enter the [budget](#) format on which you want to base the new one.

Year

Enter the year of the old [budget](#).

Type

Enter the type of the old [budget](#).

New Format

Enter the code for the new [budget](#) format.

Year

Enter the year of the new [budget](#).

Type

Enter the new [budget](#) type.

Factor %

Enter the percentage change for the new [budget](#). The [values](#) in the old [budget](#) will be increased or decreased by this percentage. If you want to specify a decrease, enter the number followed by a minus sign.

Press Enter to validate the information and then select **Update (F8)** to confirm creation of the new [budget](#).

About Sales Analysis Processing and Updates

The Sales Analysis Processing and Updates tasks are used to:

- Produce Sales Analysis reports at regular intervals
- Manage the data in the Sales History Database

Regular Updates

When you create Report Specifications and Ranking Analysis Specifications, you specify when you want them to be printed.

You use the Daily, Weekly, Period and Year End Update tasks to produce Sales reports and Ranking Analysis reports at regular intervals:

- The Daily Update task prints the reports you decide to produce daily.
- The Weekly Update task prints the reports you decide to produce weekly.
- The Period End Update task prints the reports you decide to produce at period end.
- The Year End Update prints the reports you want to produce at the end of the year.

Each update task submits a batch job, which performs all the necessary processing to create and print any Sales Analysis reports flagged for production at that time.

Caution: You should run the Year End Update before using the Period End Update. At the end of each year, the Period End Update will increment the year number by 1 and re-set the period number to 1.

Sales History Database Management

The following two processing tasks manage the data in the Sales History [database](#):

- The Refresh Sales History task is used to refresh the customer and item attributes in the Sales History database.
- The Sales History Update task is used to update the Sales History database with sales information from invoices.

Daily Update [1/STSAP]

Use this task to select and print reports that have been specified for production at the end of each day.

Select **Confirm Submit (F8)** to submit the batch job for processing.

Weekly Update [2/STSAP]

Use this task to select and print reports that have been specified for production at the end of each week.

The reports specified for Week End production will be printed, and the Week Number on the company profile will be incremented.

Select **Confirm Submit (F8)** to submit the batch job for processing.

Period Update [3/STSAP]

Use this task to select and print reports that have specified for production at the end of each period.

The reports specified for Period End production are printed, and the Period Number on the company profile is incremented.

Note: *If you perform a Period Update at the end of the last period in the year, the year number is incremented, and the period number is set to 1 on the Sales Analysis company profile.*

Select **Confirm Submit (F8)** to submit the batch job for processing.

Yearly Update [4/STSAP]

Use this task to select and print reports that have been specified for production at the end of each year.

Caution: You should run the Yearly Update before using the Period Update. At the end of each year, the Period Update will increment the year number by 1 and re-set the period number to 1.

Select **Confirm Submit (F8)** to submit the batch job for processing.

Refresh Sales History [5/STSAP]

Use this task to refresh the customer and [item attributes](#) in the Sales History [database](#).

When you set up your Sales History database, you select the customer and item attributes you want to include in your Sales Analysis reports and enquiries.

If any of these customer and item attributes is changed in Inventory Management or Sales Order Processing, you use this task to refresh the Sales History database with the new data.

If, for example, you have included sales regions in your Sales History database and your sales regions were to be re-organised, you could use this task to refresh the database with this new information. Any subsequent sales analysis will be performed with the sales regions in their new arrangement.

You can:

- Select the attributes you want to refresh.
- Choose to refresh your Sales History data starting from a specific year and period. Any Sales History data before this year and period is left unchanged.

Refresh Sales History Window

To display this window, select the Refresh Sales History task.

Note: You cannot refresh the invoice data in the Sales History [database](#).

Use this window to select the information you want to refresh and the period from which to refresh it.

Fields

Refresh From Date

Enter the year and period from which you want to refresh the Sales History data.

Refresh Fields

Note: The fields displayed on this window depend on the selections made when the [database](#) was created. (See the Create Database section in the Utilities chapter of this product guide for further information.)

Use these checkboxes as follows:

Unchecked - Not to refresh the Sales History data

Checked - To refresh the Sales History data

Select **Update (F8)** to submit the batch job for processing.

Sales History Update [6/STSAP]

Use this task to update the Sales History [database](#) with sales information from invoices.

The Sales Analysis Calendar Maintenance windows are displayed, so that you can be sure that the calendar required for the update exists.

If required, you can maintain the calendar before submitting the update.

Caution: We strongly recommend that you align your Sales Analysis, Inventory Management and Forecasting calendar periods. Failure to do this will affect the accuracy of any reports and forecasts you produce.

If, for example, the Sales Analysis calendar is not aligned with the Inventory calendar, the period recorded on an invoice, and its corresponding stock movement, will not align with the cost [values](#) and sales values recorded in Sales Analysis.

The frequency with which you run the Sales History Update depends on:

- How frequently you produce Sales reports
- Your requirement for up-to-date data in your Sales Analysis enquiries

You could benefit by including the Sales History Update as part of any automatic day end processing that you perform.

More regular updates can be scheduled with Machine Manager.

Note: *The time the Sales History Update takes to complete depends on the volume of data to be processed.*

Calendar Maintenance Selection Window

To display this window, select the Sales History Update task.

Use this window to select the calendar for the update period.

Fields

Year

Enter the year on which the update is to be based.

Type

Select one of the following:

Period (1) - To maintain end dates for periods

Week (2) - To maintain end dates for weeks

Functions

Confirm Update (F8)

Use this to submit a job to perform the sales history update.

Press Enter to display the Calendar Maintenance Number of Periods pop-up.

Calendar Maintenance Number of Periods Pop-up

To display this window, press Enter on the Calendar Maintenance Selection window.

Use this window to enter the number of periods for the year and type of calendar selected.

Fields

Enter the No. of Periods for the Year You Are Maintaining

Enter the number of periods, which will depend on whether you are performing weekly or period maintenance.

Press Enter to display the Calendar Maintenance Detail window.

Calendar Maintenance Detail Window

To display this window, enter the year and type and press Enter on the Calendar Maintenance Selection window.

The periods, or weeks, and end dates for the year are displayed on this window. If there are no end dates, you must enter them or the Sales History Update will not function correctly.

Fields

Year

The selected year is displayed and cannot be changed.

Type

The selected type is displayed and cannot be changed.

End Date

Enter or select the last date of the period.

If you are creating a new calendar, you can enter just the end date on which the first period, or week, ends and press Enter; the software will generate the remaining end dates. You can accept these or change them.

Elapsed Days

Enter the number of days that have elapsed in the selected period.

Selling Days

Enter the number of selling days in the period selected.

Select **Update (F8)** if period end dates have been changed or added. This will return you to the Calendar Maintenance Selection window, where you can select **Confirm Update (F8)** to submit the Sales History Update batch job for processing.

Sales Enquiry [1/STSAE]

Use this task to create and view your own Sales History enquiries. You create your own views by choosing an [attribute](#) on which to enquire and an [attribute](#) by which to analyse.

There are two stages to setting up a Sales Analysis enquiry:

- 1 Define the enquiry format.
- 2 Process the enquiry.

Sales History Enquiry Selection Window

To display this window, select the Sales Enquiry task.

Use this window to select the [attribute](#) on which to enquire, and to specify the [attribute](#) by which to analyse it.

Fields

Note: *The fields displayed will be those selected when the Sales Analysis [database](#) was created or modified.*

Enquire On

Choose one [attribute](#) on which to enquire, by entering a code for the attribute in the left-hand column.

You may use the prompt facility on fields where this is indicated.

Analysed By

Enter **1** against the [attribute](#) by which you want to analyse.

Press Enter to display either the Sales History Enquiry Creation window if the enquiry format does not yet exist or the Sales History Enquiry Details window if the format does already exist.

Sales History Enquiry Creation Window

To display this window, select [attributes](#) that have no format set up and press Enter on the Sales History Enquiry Selection window.

Use this window to create a new enquiry.

When you create the enquiry, the software generates summary files that provide the information for the enquiry. Once they have been created, these summary files will be updated during future Sales History Updates.

If you create the enquiry interactively, you will be returned to the [attribute](#) selection window on completion. Press Enter to use the enquiry. If you create the enquiry as a batch job, wait for the job to complete before using it.

Fields

Enquire On

This field displays the [attribute](#) you have selected for enquiry.

Analysed by

This field displays the [attribute](#) by which you have chosen to analyse the data.

Batch/Interactive

Select one of the following:

Batch (1) - To create the enquiry as part of a batch process

Interactive (2) - To create the enquiry interactively

***Note:** If you are handling large amounts of sales history data, it is advisable to create the enquiry in batch. Creating the enquiry interactively could render your terminal inoperable for a long time.*

Select **Submit (F8)** to create the enquiry.

View Sales History Enquiry Details Window

To display this window, select the Enquire On and Analyse On attributes and press Enter on the Sales History Enquiry Selection window.

Use this window to view the detailed analysis produced by the enquiry. The actual data displayed is determined by a combination of factors.

The window displays a single [attribute](#) analysed by another attribute. For each attribute, there are four columns of data, the content of which is determined by the enquiry format. The current content of each column, in terms of time period and [value](#), is indicated on the window.

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Fields

Enquiry Attribute (Titled according to the current enquiry)

The [attribute](#) on which you are enquiring is displayed, but can be changed.

Note: Press Enter to step through the [values](#) in sequence. At the end, you will be returned to the Sales History Enquiry Selection window.

Fmt

Enter a valid format previously defined in the Sales History Time Period Selection task. The default is 1.

Displayed Values

The [value](#) selected using **Values (F8)** are displayed in the appropriate column depending on the format selected. The default [value](#) is **Cost Value**.

Options

Upside Down

Use this to select an enquiry line and turn the enquiry upside down.

Graph

Use this to select a line and display the data in graph format.

Functions

Values (F8)

Use this to display the Sales History Enquiry Display [Values](#) Selection window. You use this window to change the invoice [value](#) used in the Sales History Enquiry.

Press Enter to re-display the Sales History Enquiry Selection window.

Sales History Enquiry Display Values Selection Window

To display this window, select **Values (F8)** on the Sales History Enquiry Details window.

Use this window to change the invoice [value](#) used in the enquiry, while keeping the time periods the same.

You can also change the scaling factors for each of the invoice values. These scaling factors default to the values set up when you define the Sales History [database](#).

Options

Select

Use this to select the [value](#) to be displayed.

Select a [value](#) or press Enter to return to the View Sales History Enquiry Details window.

Chapter 5 Reports

5

About Sales Analysis Reports

Use the Sales Analysis Reports tasks to run previously defined reports.

There are three main types of Sales Analysis report:

- Sales report
- Ranking Analysis report
- Sales Totals by Period report

Sales Report

The Sales report contains the [attributes](#) selected from the Sales History [database](#). It can contain up to five customer-related and [item](#)-related attributes, and four invoice [values](#), which are analysed for a particular time period.

These reports are defined using the Report Specifications Maintenance task.

Ranking Analysis Reports

The Ranking Analysis report is used to rank a selected customer or [item attribute](#) based on a summarised invoice [value](#), over a specified time period.

For example, a Ranking Analysis report might:

- Rank all salesmen
- On the basis of sales quantity
- Over the first six months of the year

These reports are defined using the Ranking Analysis Specifications Maintenance task.

Sales Totals by Period Report

The Sales Totals by Period report is used to produce a list of all sales made during a single calendar period.

Printing File Lists

The following are additional reports:

- Item File Print - used to print a list of the items defined to Inventory
- Customer File Print - used to print a list of the customers defined to Sales Order Processing

- Report Specification Print - used to print a list of the Sales Analysis Report Specifications

Sales [1/STSAR]

Use this task to run a Sales report.

Sales Analysis reports are user-defined in terms of sequence, selection and content. The Sales Analysis report generator produces its own programs, and therefore creating a new report takes longer than running an existing one, since the software has to compile your report specifications into executable code. This should be taken into account if you need to create a large number of new reports.

Request Sales Report Selection Window

To display this window, select the Sales task.

Use this window to enter the report reference and the reporting level.

Fields

Report Reference

Enter the name of the report you want to run.

Alternatively, use the prompt facility to select from the Report Selection pop-up.

Reporting Level

Select one of the following.

Style (blank) - To produce a report containing style information only

Full product (F) - To produce a report containing full product information

Press Enter to confirm your selections and then select **Submit (F8)** to produce the report.

Ranking Analysis [2/STSAR]

Use this task to select and run a previously specified Ranking Analysis report.

Request Ranking Analysis Window

To display this window, select the Ranking Analysis task.

Use this window to select the report to run.

Fields

Report Reference

Enter the reference of the report you want to run.

Alternatively, use the prompt facility to select from the Ranking Analysis Specification Selection pop-up.

Press Enter to confirm the selection and then select **Submit (F8)** to produce the report.

Item File [3/STSAR]

Use this task to produce a list of the [items](#) defined within Inventory Management, together with their [attributes](#) chosen for inclusion on the Sales History [database](#).

This task submits a batch job that produces the list and sends it to the print queue.

Select **Confirm Submit (F8)** to submit the batch job for processing.

Customer File [4/STSAR]

Use this task to produce a listing of the customers defined within Sales Order Processing, together with their [attributes](#) chosen for inclusion on the Sales History [database](#).

This task submits a batch job that produces the list and sends it to the print queue.

Select **Confirm Submit (F8)** to submit the batch job for processing.

Report Specification [5/STSAR]

Use this task to produce a listing of the report specifications defined within Sales Analysis.

This task submits a batch job that produces the list and sends it to the print queue.

Select **Confirm Submit (F8)** to submit the batch job for processing.

Sales Totals by Period [6/STSAR]

Use this task to produce a listing of the sales totals held within the Sales History database. You can list the sales totals for a specific year and period, a specific year, or for all years and periods held on the [database](#).

Sales Totals by Period Selection Window

To display this window, select the Sales Totals by Period task.

Use this window to select the way in which periods are to be viewed on the report.

Fields

Select Report Type and Press Enter

Select one of the following:

Single year & period (1)

All periods for a single year (2)

Rolling periods (3)

All (4)

Press Enter to re-display the window with additional fields, which will depend upon the selection made.

Sales Totals by Period Selection Window A

To display this window, select Single year & period and then press Enter on the Sales Totals by Period Selection window.

Use this window to enter the year and period for the Sales Totals by Period report, and to specify the way in which sales figures for kits are displayed.

Fields

Year

Enter the year for which you want to produce the report.

Period

Enter the period for which you want to produce the report.

Exclusion Type

Select one of the following:

Exclude neither kit parent nor component (0) - To include both the kit parent and components, and therefore have possible double counting

Exclude component if you post the kit parent and component (1) - To exclude kit components from the report

Exclude kit parent if you post both (2) - To exclude the kit parents, if you post both parent and components

Note: *The Exclusion Type field is for use with kits only.*

Press Enter to validate the data and then select **Confirm (F8)** to submit the batch job for processing.

Sales Totals by Period Selection Window B

To display this window, select All periods for a single year and then press Enter on the Sales Totals by Period Selection window.

Use this window to enter the year for the Sales Totals by Period report, and to specify the way in which sales figures for kits are displayed.

Fields

Year

Enter the year for which you want to produce the report.

Exclusion Type

Select one of the following:

Exclude neither kit parent nor component (0) - To include both the kit parent and components, and therefore have possible double counting

Exclude component if you post the kit parent and component (1) - To exclude kit components from the report

Exclude kit parent if you post both (2) - To exclude the kit parents, if you post both parent and components

Note: *The Exclusion Type field is for use with kits only.*

Press Enter to validate the data and then select **Confirm (F8)** to submit the batch job for processing.

Sales Totals by Period Selection Window C

To display this window, select Rolling periods and then press Enter on the Sales Totals by Period Selection window.

Use this window to enter the year and period ranges for the Sales Totals by Period report, and to specify the way in which sales figures for kits are displayed.

Fields**Year/To Year**

Enter the year range for which you want to produce the report.

Period/To Period

Enter the period range for which you want to produce the report.

Exclusion Type

Select one of the following:

Exclude neither kit parent nor component (0) - To include both the kit parent and components, and therefore have possible double counting

Exclude component if you post the kit parent and component (1) - To exclude kit components from the report

Exclude kit parent if you post both (2) - To exclude the kit parents, if you post both parent and components

Note: *The Exclusion Type field is for use with kits only.*

Press Enter to validate the data and then select **Confirm (F8)** to submit the batch job for processing.

Sales Totals by Period Selection Window D

To display this window, select All and then press Enter on the Sales Totals by Period Selection window.

Use this window to specify the way in which sales figures for kits are displayed.

Fields**Exclusion Type**

Select one of the following:

Exclude neither kit parent nor component (0) - To include both the kit parent and components, and therefore have possible double counting

Exclude component if you post the kit parent and component (1) - To exclude kit components from the report

Exclude kit parent if you post both (2) - To exclude the kit parents, if you post both parent and components

Note: *The Exclusion Type field is for use with kits only.*

Press Enter to validate the data and then select **Confirm (F8)** to submit the batch job for processing.

Clear Database [1/STSAU]

Use this task to clear all user data held in the Sales Analysis [database](#). This can be useful if you want to clear test data at installation time, before running the system live.

Caution: This utility will clear ALL data held in Sales Analysis, not just the Sales History Database.

Note: Before you use this task, make sure the logical file SALESSUM (or physical file SALANALD) has not been created in the interactive [library](#) QTEMP. This will cause problems when you re-create the [database](#) later. In the event that the logical file SALESSUM has been created in QTEMP, sign off to clear QTEMP. You can now use the Clear Database task.

This task clears the following files:

- Calendar file
- Sales Analysis History file
- Sales Analysis Budget file
- Spread Profile Detail file
- Spread Profile Header file
- Budget Format file
- Sales History Format file
- Sales Enquiry Format file
- Ranking Analysis file
- Sales Analysis Report file
- Record Locking file
- Sales Analysis Report Select/Omit file

Clear Database Confirmation Window

To display this window, select the Clear [Database](#) task.

Use this window to confirm the clearance of the [database](#).

Press Enter to continue with the process to clear the [database](#).

Reset Invoice Posted Flag for a Company [2/STSAU]

Use this task to reset the Invoice Posted flag on the Invoice Details file for a selected company.

This flag indicates whether invoices have been posted to Sales Analysis.

Note: You can use this task before running the Sales History Update task for a second time with the same invoice data, when, for example, the Sales History [database](#) has been re-defined.

Note: This task requires exclusive use of the system.

Reset Invoice Posted Flag Selection Window

To display this window, select the Reset Inv. Posted Flag - Comp. task.

Use this window to select the company for which you want to re-set the Invoice Posted flag.

Fields

Company Number

Enter the company for which you want to re-set the Invoice Posted flag.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Press Enter and then select **Confirm (F8)** to submit the batch job for processing.

Reset Invoice Posted Flag within Dates [3/STSAU]

Use this task to re-set the Invoice Posted flag for a company, with the option of restricting the time period.

Reset Invoice Posted Flag within Dates Selection Window

To display this window, select the Reset Inv. Posted Flag - Date task.

Use this window to select the company for which you want to re-set the Invoice Posted flag and the date range.

Fields**Company Number**

Enter the company for which you want to re-set the Invoice Posted flag.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Dates From/To

Enter or select the required date range.

Press Enter and then select **Confirm (F8)** to submit the batch job for processing.

Flag All Invoices As Posted for a Company [4/STSAU]

Use this task to flag invoice details as having been posted to Sales Analysis for a particular company.

Flag All Invoices As Posted for a Company Selection Window

To display this window, select the Flag All Inv. As Posted - Comp. task.

Use this window to select the company for which you want to flag the invoices as posted.

Fields**Company Number**

Enter the company for which you want to flag all invoices as posted.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Press Enter and then select **Confirm (F8)** to submit the batch job for processing.

Zeroise Sales Analysis Values for a Period/Company [5/STSAU]

Use this task to zeroise sales history data on the Sales History [database](#) for a specified company and period.

Zeroise Sales Analysis Values for a Period/Company Selection Window

To display this window, select the Zeroise SA Values - Per/Comp. task.

Use this window to select the company and date range for which you want to re-set the sales analysis [values](#).

Note: *You can re-set data for a company or simply re-set any unnecessary test data.*

Fields

Company Number

Enter the company code for which you want to zeroise the sales history data.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Date: Year/Period

Enter the year and the period for which you want to zeroise the sales history data.

The following files will have some fields cleared by this task:

Sales Analysis History file

Sales History Summary file

Press Enter to validate the entries and then select **Confirm (F8)** to submit the batch job to delete the data.

Delete Sales Analysis Data for a Year/Company [6/STSAU]

Use this task to delete data from the Sales History [database](#) for a selected company and year.

The following files are purged by this task:

- Sales Analysis History file
- Sales Analysis Summary file

Delete Sales Analysis Data for a Year/Company Selection Window

To display this window, select the Delete SA Data for Year/Comp. task.

Use this window to select the company and date for which you want to delete sales analysis data.

Note: You could use this task to delete old data that is no longer of interest, or simply to remove unwanted test data.

Fields

Company Number

Enter the company for which you want to delete Sales Analysis data.

Alternatively, use the prompt facility to select from the Company Selection pop-up.

Date: Year

Enter the year for which to delete data.

Press Enter to validate the entries and then select **Confirm (F8)** to submit the batch job to delete the data.

Change Initial Field Descriptions [7/STSAU]

Use this task to change the descriptions of fields known to Sales Analysis. For this to be effective, you must do it before creating the Sales History [database](#). The names of the fields shown on displays and enquiries are defined in this task.

You can step through the fields in sequence and overwrite the descriptions of the fields where required.

Changes made using this task are incorporated into the Sales History [database](#) when it is created and are available through IBM utilities such as DFU and QUERY.

Change Initial Field Descriptions Selection Window

To display this window, select the Change Initial Field Desc. task.

Use this window to change the selected field description.

Fields

Field Type

The field type is displayed. Possible [values](#) are:

X - Essential key field

1 - Essential key field

2 - Calculated field

3 - Customer-based field

4 - [Item](#)-based field

5 - Invoice-based field

Field Name

The field name is displayed.

Description

The description for the field is displayed.

Short Name

You can enter or amend the short name given to the field.

Note: *The short name is used for headings of columns or rows in reports and enquiries.*

Press Enter to update the data with any changes you have made and to display the next field. Select **Exit (F3)** to leave the task.

Change Database Field Descriptions [8/STSAU]

Use this task to change the descriptions of fields chosen for incorporation in the Sales History [database](#). It can only be used after the Sales History [database](#) has been created.

You can step through the fields in sequence and overtype the descriptions of fields where required.

Changes made using this task are only apparent within the Sales Analysis application, and will not be accessible to IBM utilities, such as DFU and QUERY.

Change Database Field Descriptions Selection Window

To display this window, select the Change [Database](#) Field Desc. task.

Use this window to change the selected field description.

Fields**Field Name**

The field name of the Sales Analysis [database](#) field into which data will be written is displayed.

From

The field name from which the data will be retrieved is displayed.

File

The [Item](#), Customer or Invoice file containing the From field is displayed.

Short Name

You can change the short name of the field, which can be different from the original System21 name.

Note: *The short name is used for headings of columns or rows in reports and enquiries.*

Press Enter to update the data with any changes you have made and to display the next field. Select **Exit (F3)** to leave the task.

Create Database [9/STSAU]

Use this task at the time of installation to define the contents of the Sales History [database](#).

You can choose up to six customer-related fields, up to six [item](#)-related fields, and up to five [values](#) or invoice-related fields.

The submitted batch job deletes the existing Sales History [database](#), and creates a new version according to your definition.

The Sales History [database](#) uses information from both Inventory Management and Sales Order Processing. This structure allows easy manipulation and analysis of the available information.

Selection of Data Elements

Use this task to define a [database](#) containing those [data elements](#) that are important or relevant to you.

You may be looking for trends, such as the changes in sales volumes across regions, or the relative performance of members of your sales force; or you may want to analyse the sales performance of different [item](#) groups, and so on.

The nature of the analysis you want to perform, together with the information held for [items](#) and customers, should serve as a guide when defining the [database](#).

If you group your customers by region, and you want to analyse the sales performance by region, you should choose the region from the customer related information for inclusion on the [database](#). If the performance of your salespeople is important, you should use this [data element](#). Similarly, if the [item](#) group from the [item](#) related information is important, this should be included.

The Sales Analysis application itself incorporates the customer code and delivery sequence, the [item](#) code and the [value](#) fields cost, quantity and sales [value](#).

Values

When you define the [database](#), consider the sales volumes that you expect to handle, as it is possible for particularly high [values](#) to be too large to display on the enquiry, if they are in excess of nine digits. In this event, use scaling factors to scale [values](#) into 10s, 100s, 1000s or 10,000s.

The default is a factor of 01, which will display standard units. 02 will scale in 10s, 03 in 100s, 04 in 1000s and 05 in 10,000s.

Defining the Time Period

Whilst this is not a part of the Create [Database](#) function, you should also consider the level of analysis you require in terms of the time period.

This is defined on the company profile, and can be by week or by period. If you hold information at a weekly level, more information is stored than if it is held by period. This [value](#) should not be changed during the normal operation of the system.

Note: *There is only one [database](#) definition for all companies in an installation of Sales Analysis. All companies can use this definition independently, once created.*

Re-naming Data Elements

It is possible, within Sales Analysis, to alter the names of [data elements](#) or fields that are displayed by the software.

For example, if you use the customer-related field Territory to mean County, you can change the name used in Sales Analysis. This can be done in two ways, which have slightly differing effects.

- You can use the Change Initial Field Descriptions task to change the names of fields before database creation. The changed names are available in views of the database external to Sales Analysis, for example, IBM utilities such as QUERY.
- Once the database has been created, you can use the Change Database Field Descriptions task, which only change the names held within Sales Analysis.

Create Sales History Database Selection Window

To display this window, select the Create [Database](#) task.

Use this window to select the attributes you want to include in the database. Use **Page Up** or **Page Down** to see all of the attributes.

Fields

Select (Untitled)

Enter **1** to select [attributes](#) for inclusion in the [database](#). You can choose up to six customer-related fields, six [item](#)-related fields, and five [value](#) or invoice-related fields.

Short Name

Enter the short name you want to use for the [attribute](#). These names will be incorporated into the [database](#) definition of Sales Analysis, and will therefore be available to IBM utilities.

Line 1 + 2

Enter an additional line of description of the [attribute](#) if required.

Select Confirm **Update (F8)** to update the files.

Appendix A Glossary

A**Attribute**

In Sales Analysis, a characteristic of either a customer or an [item](#)

Budget

A forecast or estimate expressed in a [value](#), against [attributes](#) of [items](#) or customers

Database

The collection of Sales History information used for enquiries and reports

Data Element

A discrete piece of information in the [database](#)

Descriptions File

This is a file maintained within Inventory Management which defines a number of parameter codes and their descriptions.

Item

The single term used to determine an element of stock identified by a unique number

Library

Means of grouping programs, files and so on, on the [database](#)

Ranking

This is sequencing by [value](#), for example, cost or quantity. It is used in Sales Analysis as a means of report sequencing.

SKU

The SKU (Stock Keeping Unit) represents the lowest level of definition for a style, whether it is a simple one-dimensional or a four-dimensional product. For example, an [item](#) with an assigned style with colours, fittings and sizes is a four-dimensional product. Together, these dimensions constitute the SKU and differentiate it from other items.

Value

This is a numeric [data element](#), usually representing money or a quantity. In Sales Analysis, the values used are those associated with invoices.