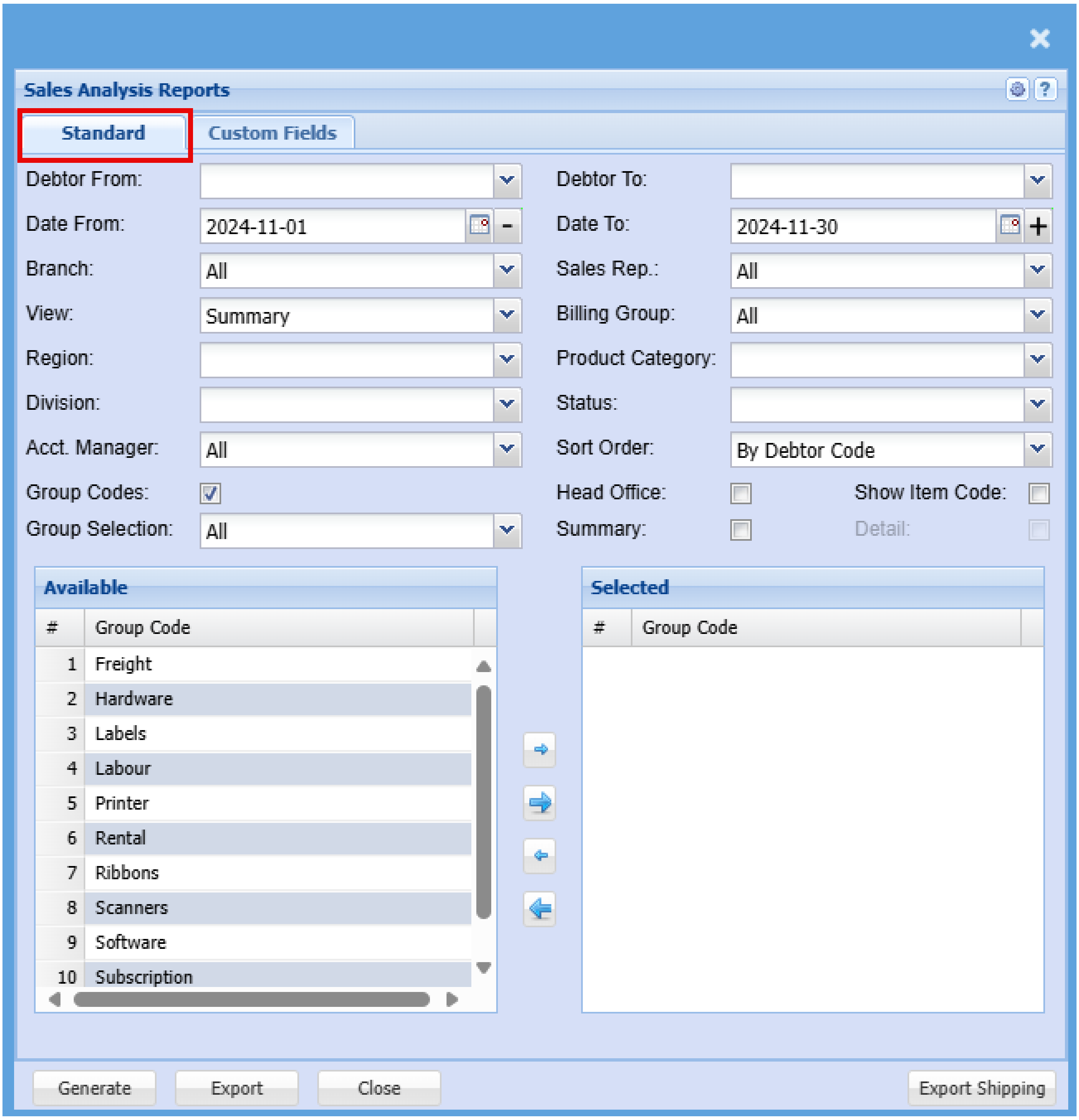
Sales Analysis Report

Debtors >Reports >Report list

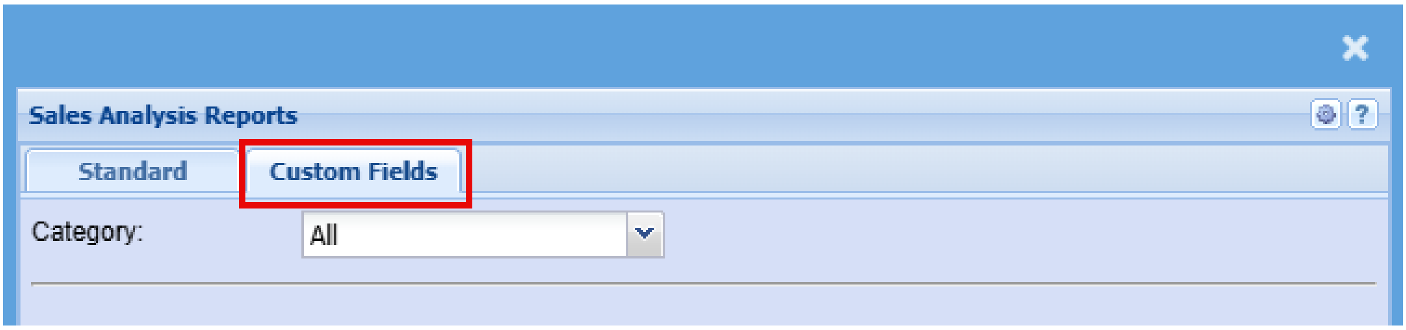
This report is broken down per Debtor per item sold with profits made on each item and percentage.



Standard Tab

Debtor From / Debtor To	Select a Customer/Debtor you wish to view the report from. Select the Customer/Debtor you wish to see up to in the report.
Date From / Date To	Choose the date range for which you want to view the report from / Select a date range of when you want to see up to on the report.
Branch	When working with multiple branches this drop-down allows the user to select a specific branch to pull a report for.
View	Select how you want to view the report, either in a summary view or a Cutt off version.
Region	You can pull the report for all your debtors, or you can select a specific Region from the drop-down menu if you have set up Regions for your debtors.
Division	If you have set up divisions for your debtors, you can pull the report for all your debtors or you can select a specific Division from the drop-down menu.
Acct. Manager	You can pull the report for all your debtors, or you can select a specific Account manager from the drop-down menu if you have set up Account Managers for your debtors.
Group Codes	If you have set up Group Codes for your inventory you can select a group code from the drop-down menu to define your search to a specific group. Leave unticked if you want a report for all Groups.
Group Selection	When Group Codes is ticked you will be able to Select specific inventory Groups to pull a report for.
Sales Rep	If you want to run a report by a specific sales rep, then you will need to select the sales rep on the drop-down menu. If you leave the sales rep on all the report will run by all sales rep.
Billing Group	If you have billing groups like, Subscriptions, you can pull a report for these specific groups, or you can pull a report that will include all transactions.
Status	If you select all the report will pull all statuses. If you want to view report by status, select the status on the drop-down menu
Sort Order	Choose from the drop-down menu how you would like your report sorted, your options are by Debtor Code, Debtor Name or Item Code
Head Office	by ticking the Head Office box, the report will include a column for head office sales analysis
Summary	If you put the tick on the report will only pull limited information

Detail	Selecting Detail will include all the columns available for this report



Custom Fields

Category	Select a Category from the drop-down menu

Revision #7
Created 10 May 2023 23:02:22 by Paige
Updated 25 November 2024 23:02:05 by Pamela