

# **Product Reports Sales Analysis Report**

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Pharmacy Technology Solutions — Issued July 2014

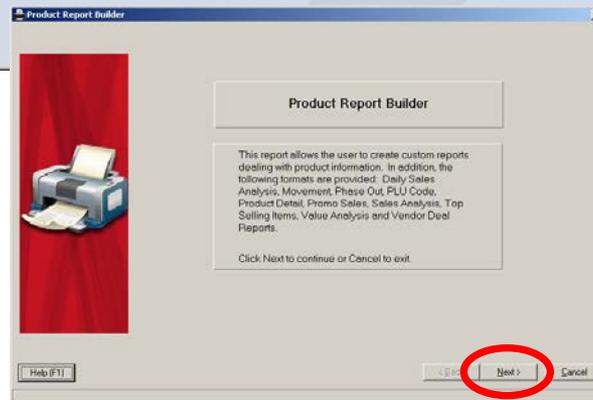
## Report Builder: Sales Analysis Report

- The Sales Analysis Report provides summary or detailed information by Vendor or Fineline
- The report includes Year-to-Date, Month-to-Date sales history in addition to the number of units sold for the previous two months

1. Click the **Reports** icon
2. Click the **General Reports** icon
3. Double-click the **Report Builder** function button

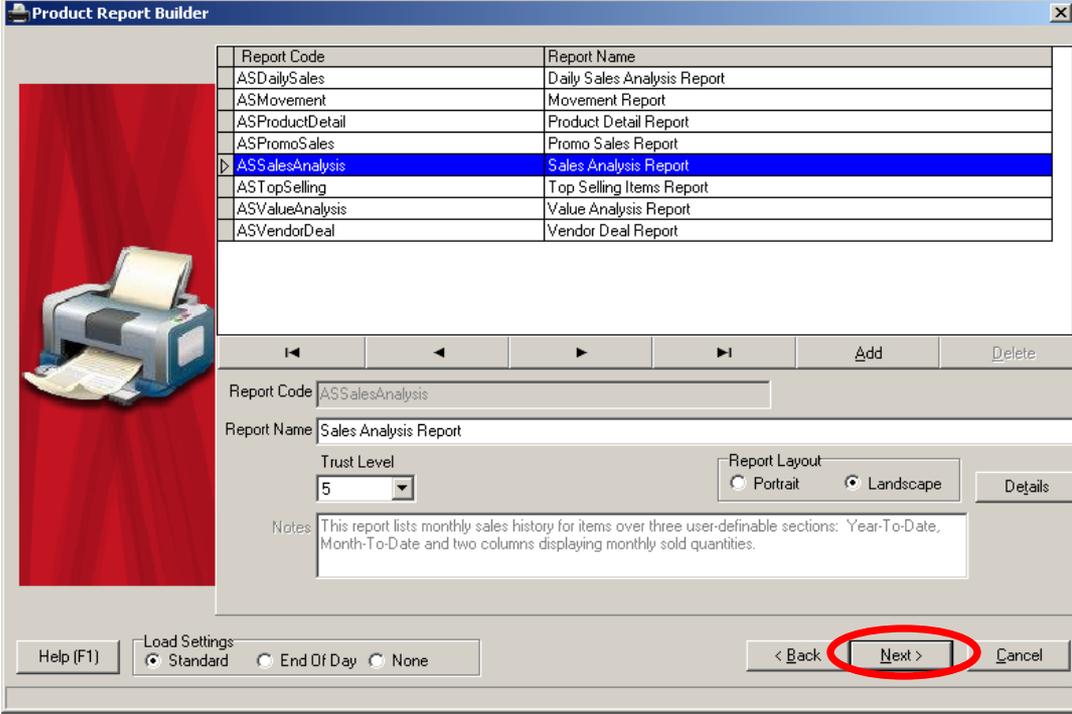


4. Click the **Next** button



**Report Builder: Sales Analysis Report (cont'd)**

- 5. Click the **Sales Analysis** report
- 6. Click the **Next** button



## Report Builder: Sales Analysis Report (cont'd)

7. Click the appropriate radio button in the **Select Criteria** section

- *It is best practice to select either **Vendor/FineLine** or **Category***
- *When **Vendor/FineLine** is selected, the **Selected Vendor** and **Selected FineLine** options become available*

8. Click the radio button in the **Selected Vendor** section

- *It is best practice to select **All Vendors***

9. Click the radio button in the **Selected FineLine** section

- **All Finelines:** *Includes a information for all vendors*
- **Selected Finelines:** *Allows you to select from a list of FineLine (list is available after you click the **Next** button)*

Product Report Builder - Sales Analysis Report

Item Selection | Include/Skip | Sales Info

Select Criteria

Vendor/FineLine  GL Account

Bin Location  Price Group

Product Filter  Equivalent Group

Category  Purchase Order

Department  Promo Event

Select Vendors

All  Selected

Select Finelines

All  Selected

Code Selections

Code Type  Start Range

End Range

Item Selections

Selection Type

Report Descriptions  Restriction

P.O.S. Descriptions  Starts With

Bar Code  Contains

Description

Help (F1) < Back Next > Cancel



*To make the report more manageable, run the report by **Selected Finelines** and only choose the finelines you want to report on.*

## Report Builder: Sales Analysis Report (cont'd)

10. Click the **Include/Skip** tab

11. Click the check box(es) in the **Skip Items** section for items you want excluded

- *Skipping items will filter out information that you do not want displayed on the report, and allow the report to generate faster*



*It is best practice to select Inactive and Zero On Hands, Negative On Hand and Open Departments. This will make the report generate faster by excluding these options from the calculation.*

Product Report Builder - Sales Analysis Report

Item Selection | **Include/Skip** | Sales Info

**Skip Items**

<input type="checkbox"/> WIC	<input checked="" type="checkbox"/> Zero On Hand
<input type="checkbox"/> WIC CVV	<input type="checkbox"/> Core Item
<input type="checkbox"/> Food Stamp	<input checked="" type="checkbox"/> Negative On Hand
<input type="checkbox"/> FSA Items	<input type="checkbox"/> PLU Code
<input type="checkbox"/> Phase Out Items	<input checked="" type="checkbox"/> Open Departments
<input checked="" type="checkbox"/> Inactive Items	<input type="checkbox"/> Expiry Date
<input type="checkbox"/> House Brand Items	<input type="checkbox"/> Zero Sale

**Report Only**

<input type="checkbox"/> WIC	<input type="checkbox"/> Zero On Hand
<input type="checkbox"/> WIC CVV	<input type="checkbox"/> Core Item
<input type="checkbox"/> Food Stamp	<input type="checkbox"/> Negative On Hand
<input type="checkbox"/> FSA Items	<input type="checkbox"/> PLU Code
<input type="checkbox"/> Phase Out Items	<input type="checkbox"/> Open Departments
<input type="checkbox"/> Inactive Items	<input type="checkbox"/> Expiry Date
<input type="checkbox"/> House Brand Items	

Help (F1) < Back Next > Cancel

## Report Builder: Sales Analysis Report (cont'd)

12. Click the **Sales Info** tab
13. Select how many months to include on the report in the **For the Last 'X' months** field
  - *For example, 0 = current month, 1= current month and last month*
14. Click the **Next** button

Product Report Builder - Sales Analysis Report

Item Selection | Includes Skip | **Sales Info**

Sales Info

Sales/Movement Selection

Unused  Bottom  Top

Top/Bottom 10 items

Unused  Equal To  Less Than  More Than

Qty Sold  Profit  Sales

Value 0.000

For the last 11 months

Margin Variance %

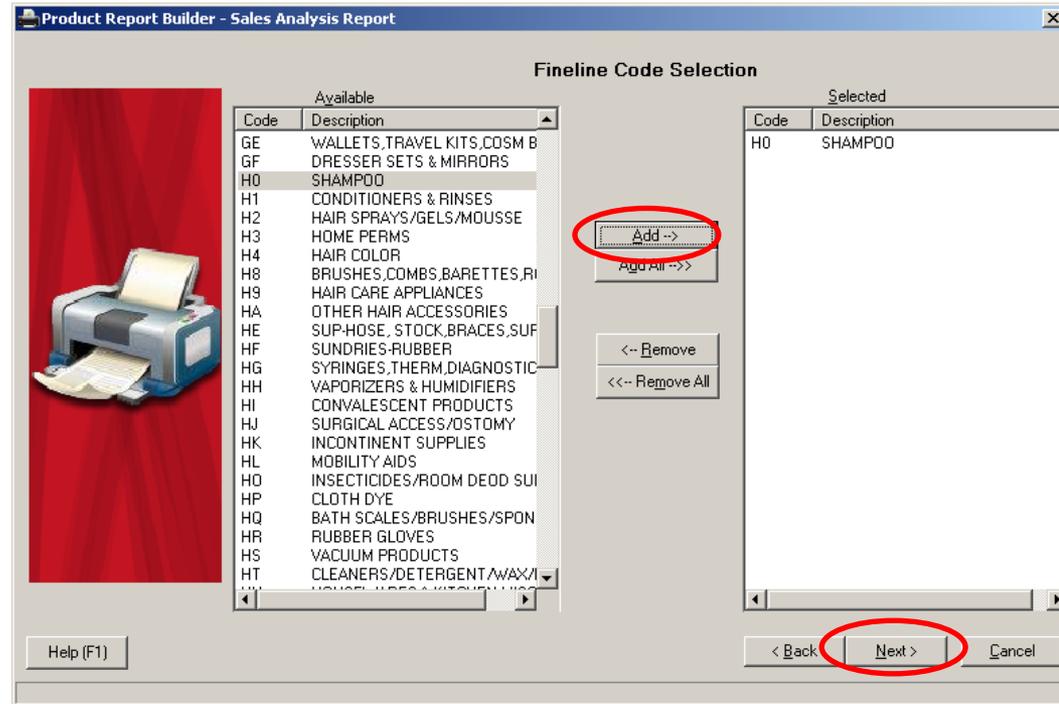
Above  Below  Both

0.00

Help (F1) < Back **Next >** Cancel

## Report Builder: Sales Analysis Report (cont'd)

- In the **Available** column, **highlight** a code/description to be included in the report
  - Only the criteria in the Slected section will appear on the report
- Click the **Add** button
- Repeat Steps 15 and 16 for all items to be included in the report
- Click the **Next** button



Helpful  
Tips

Click the  button to move all Available criteria to the Selected section

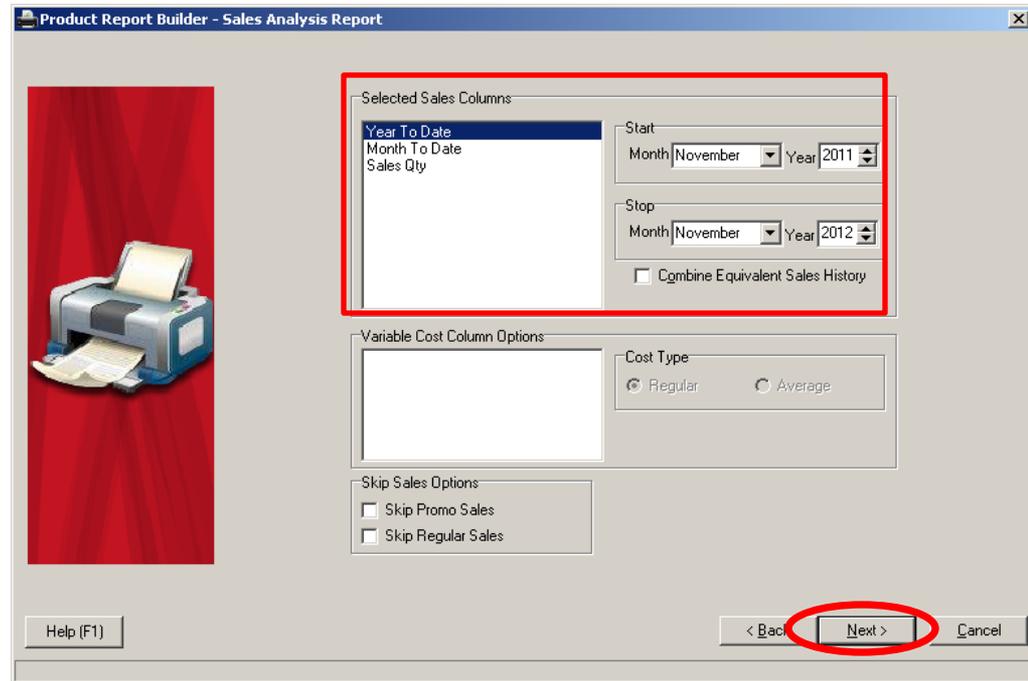
## Report Builder: Sales Analysis Report (cont'd)

19. For every **Selected Sales Column**, highlight the column name and select the start and stop dates to be used for the report

- For example, to run the report for a year and the current month is November 2012 change the dates to the following:

- **Year to Date** – November 2011 to November 2012
- **Month to Date** – November 2012 to November 2012
- **Sales History Qty Month 0** – November 2012 to November 2012
- **Sales History Qty Month 1** – October 2012 to October 2012

20. Click the **Next** button



The screenshot shows the 'Product Report Builder - Sales Analysis Report' dialog box. On the left is a printer icon on a red background. The main area contains several sections:

- Selected Sales Columns:** A list box containing 'Year To Date', 'Month To Date', and 'Sales Qty'. 'Year To Date' is selected.
- Start:** Month: November, Year: 2011.
- Stop:** Month: November, Year: 2012.
- Combine Equivalent Sales History
- Variable Cost Column Options:** An empty list box.
- Cost Type:**  Regular,  Average.
- Skip Sales Options:**  Skip Promo Sales,  Skip Regular Sales.

At the bottom, there are buttons for 'Help (F1)', '< Back', 'Next >', and 'Cancel'. The 'Next >' button is circled in red.

## Report Builder: Sales Analysis Report (cont'd)

21. Select the appropriate radio button in the **Primary Sort Options** section

- Depending on what was selected on the **Item Selection** tab make your selection. For example, if you selected specific **Finelines** you may want to sort the report by **Fineline**

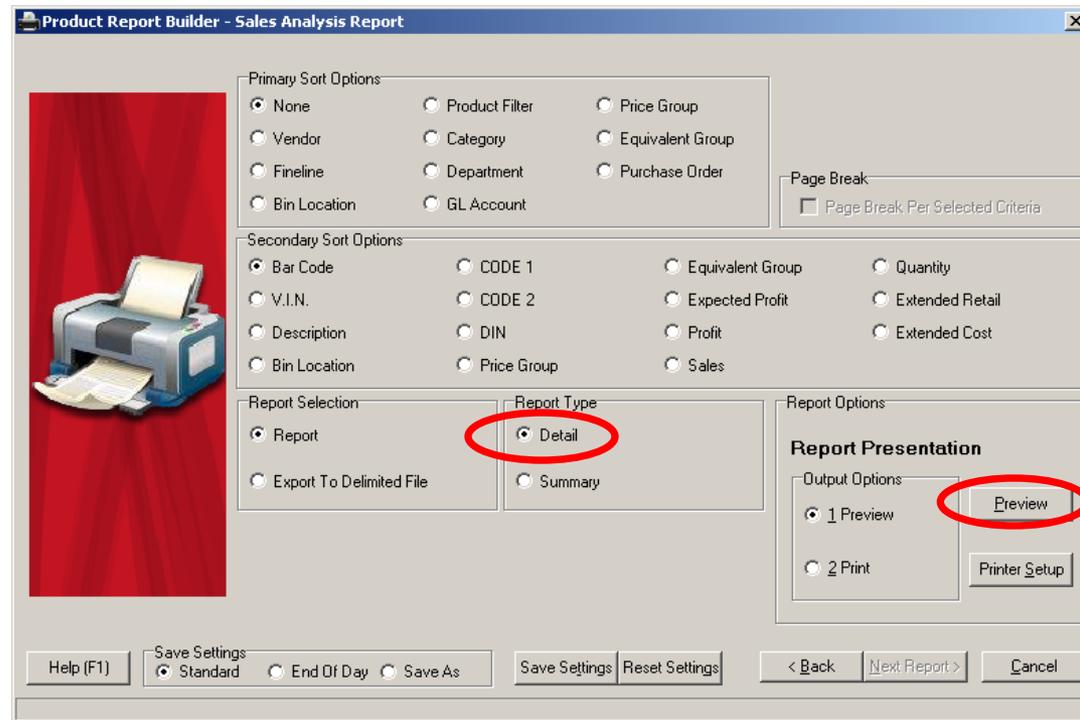
22. Select the **Report Type**

- **Detail**: Will report a value for each bar code with the **Fineline/Category/Department** selected
- **Summary**: Will report a total value for each **Fineline/Category/Department**

23. Click the **Preview** button in the **Output Options** section

- It is best practice to preview all reports to ensure they contain the information you need before printing

24. Click the **Preview** button



The screenshot shows the 'Product Report Builder - Sales Analysis Report' dialog box. It is divided into several sections:

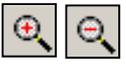
- Primary Sort Options:** Includes radio buttons for None, Vendor, Fineline, Bin Location, Product Filter, Category, Department, GL Account, Price Group, Equivalent Group, and Purchase Order.
- Secondary Sort Options:** Includes radio buttons for Bar Code, V.I.N., Description, Bin Location, CODE 1, CODE 2, DIN, Price Group, Equivalent Group, Expected Profit, Profit, Sales, Quantity, Extended Retail, and Extended Cost.
- Report Selection:** Includes radio buttons for Report and Export To Delimited File.
- Report Type:** Includes radio buttons for Detail (circled in red) and Summary.
- Report Options:** Includes a 'Page Break' checkbox for 'Page Break Per Selected Criteria'.
- Report Presentation:** Includes a section for 'Output Options' with radio buttons for '1 Preview' (circled in red) and '2 Print', and a 'Printer Setup' button.

At the bottom, there are buttons for 'Help (F1)', 'Save Settings' (with 'Standard', 'End Of Day', and 'Save As' options), 'Reset Settings', '< Back', 'Next Report >', and 'Cancel'.

# Report Builder: Sales Analysis Report (cont'd)

- The report will take a few minutes to generate
- The preview screen allows you to view the report without/prior to printing

25. Click the **preview icons** to view the report:



**Zoom In and Zoom Out**



**Previous Page and Next Page**

26. Click the **Exit**  to close the preview without printing

OR

27. Click the **Print**  button to print a copy of the report

28. Click the **OK** button in the **Print options window**



29. Click the **Exit**  button when complete

Zoom %  Page #  Page 1 of 2

(04) Nov 14/2012 15:05:14 Sales Analysis Report  
From: DRUG STORE Page: 1

Select Criteria: By All Vendor Codes and Selected Finesline Codes  
Sort By: Bar Code  
Skip: Open Departments; Negative On Hand; Zero On Hand; Inactive Items  
History Range:  
Sales History - Date Range: From (Tue) Nov 1/2011 To (Fri) Nov 30/2012  
Cost - Date Range: From (Tue) Nov 1/2011 To (Fri) Nov 30/2012  
Sales History - Date Range: From (Tue) Nov 1/2011 To (Fri) Nov 30/2012  
Cost - Date Range: From (Tue) Nov 1/2011 To (Fri) Nov 30/2012  
Month 0 - Date Range: From (Tue) Nov 1/2011 To (Fri) Nov 30/2012  
Month 1 - Date Range: From (Tue) Nov 1/2011 To (Fri) Nov 30/2012

Bar Code	Description	VIN	On Hand	Year To Date				Month To Date				Sales History Qty			
				Sales	Cost	Profit	Margin	Sales	Cost	Profit	Margin	Month 0	Month 1		
0066670072	FLAMUR 25 ZIP FINE	020460	2	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0066670073	FLAMUR 25 ZIP COL H	020429	2	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0066670074	FLAMUR 25 ZIP CATTE	020427	2	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0115090250	SCALPICIN AMTI-17CH	400613	3	64.29	57.026	26.46	21.29	64.29	57.026	26.46	21.29	13.29	13.00	13.00	13.000
0279630041	OSOX INCAJOUT SHMPO	561569	2	13.30	9.260	4.04	24.62	13.30	9.260	4.04	24.62	2.00	2.00	2.00	2.000
0279630045	OSOX COCOURT SHMPO	561571	2	13.57	14.260	5.21	26.62	13.57	14.260	5.21	26.62	2.00	2.00	2.00	2.000
0279630043	OSOX USILLA SHMPO	561265	3	28.57	14.260	6.61	31.52	28.57	14.260	6.61	31.52	2.00	2.00	2.00	2.000
0370000232	NCS CLASSIC CLEAN SH	911254	3	64.12	42.500	21.62	33.72	64.12	42.500	21.62	33.72	6.00	6.00	6.00	6.000
0370000233	NCS CITRUS SWEETE SH	910894	3	5.59	5.200	0.71	11.45	5.59	5.200	0.71	11.45	1.00	1.00	1.00	1.000
0370000235	NCS XTR VOLUME SHMP	910892	3	22.57	16.000	7.21	21.20	22.57	16.000	7.21	21.20	2.00	2.00	2.00	2.000
0370000236	NCS REFFRESH SHMP 420	911140	3	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0370000237	NCS DRY SCALP CARE 1	910926	3	21.66	11.200	11.20	24.54	21.66	11.200	11.20	24.54	4.00	4.00	4.00	4.000
0370000239	NCS SHM CARE SHMP	911807	3	5.59	5.200	0.71	11.45	5.59	5.200	0.71	11.45	1.00	1.00	1.00	1.000
0370000239	NCS CLASSIC CLEAN 1	911182	3	40.75	17.590	23.16	21.29	40.75	17.590	23.16	21.29	5.00	5.00	5.00	5.000
0370000240	NCS SHM & SILKY 1 I	911139	3	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0370000241	NCS DRY SCALP CARE 1	911140	3	46.74	21.757	14.90	21.06	46.74	21.757	14.90	21.06	6.00	6.00	6.00	6.000
0370000242	NCS SHM CARE 1 IN 1	911155	3	23.27	16.013	7.26	21.40	23.27	16.013	7.26	21.40	2.00	2.00	2.00	2.000
0370000246	NCS SHM & SILKY 1 I	911206	3	14.64	11.037	3.64	24.62	14.64	11.037	3.64	24.62	2.00	2.00	2.00	2.000
0370000247	NCS OUDAR LIFT 1 IN	911114	3	14.64	11.030	3.59	24.46	14.64	11.030	3.59	24.46	2.00	2.00	2.00	2.000
0370000248	NCS OUDAR LIFT 1 IN	911167	3	17.20	11.400	5.90	23.95	17.20	11.400	5.90	23.95	2.00	2.00	2.00	2.000
0370000249	NCS REFFRESH 2 IN 1 4	911171	3	14.60	11.030	3.59	24.46	14.60	11.030	3.59	24.46	2.00	2.00	2.00	2.000
0370001062	GILLETTE SHMPO - D	430974	1	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0370001070	GILLETTE SHMPO - C	430956	1	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.00	0.00	0.000
0500660741	DOVE THERAPY SHMP 255	004600	5	24.95	12.046	11.90	24.06	24.95	12.046	11.90	24.06	5.00	5.00	5.00	5.000