
Product Reports Sales Analysis Report

Pharmacy Technology Solutions — Issued July 2014

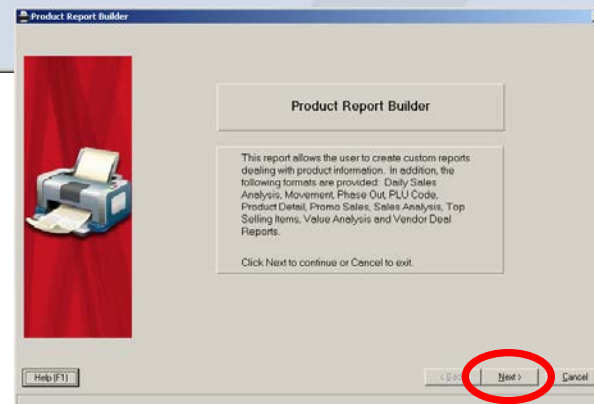
Report Builder: Sales Analysis Report

- 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

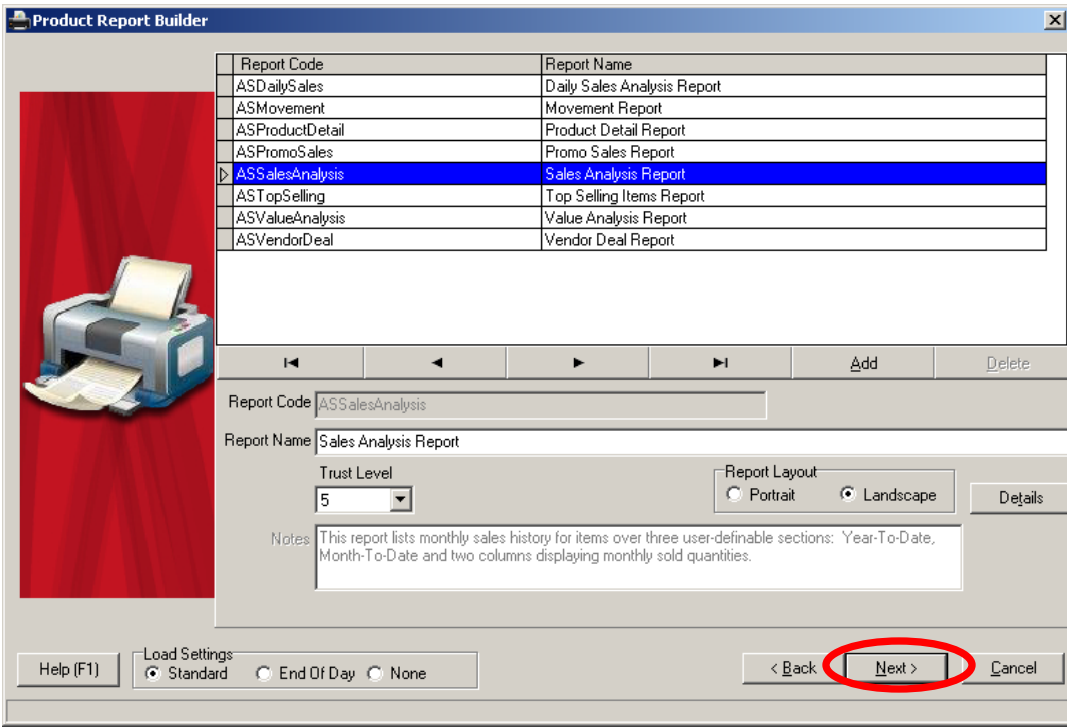


4. Click the **Next** button



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
- ☐ Bin Location
- ☐ Product Filter
- ☐ Category
- ☐ Department
- ☐ GL Account
- ☐ Price Group
- ☐ Equivalent Group
- ☐ Purchase Order
- ☐ Promo Event

Select Vendors

- ☒ All
- ☐ Selected

Select Finelines

- ☐ All
- ☒ Selected

Code Selections

Code Type: Start Range: End Range:

Item Selections

Selection Type

- ☐ Report Descriptions
- ☐ P.O.S. Descriptions
- ☐ Bar Code

Restriction

- ☐ Starts With
- ☐ 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.

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 | Include | 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

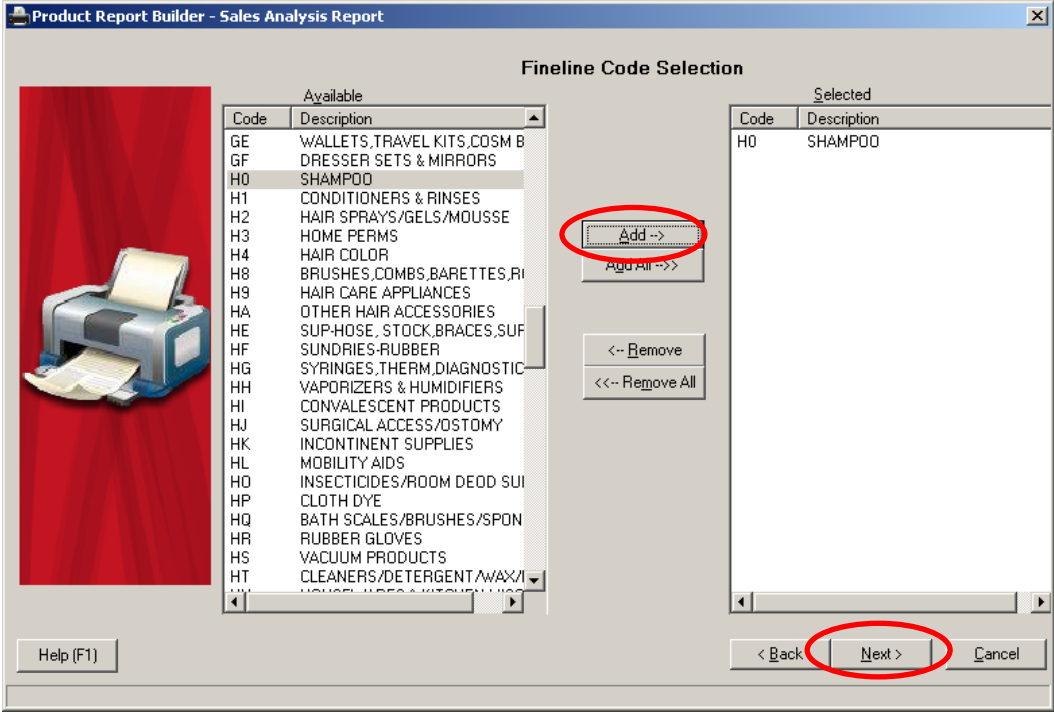
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Report Builder: Sales Analysis Report (cont'd)

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



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



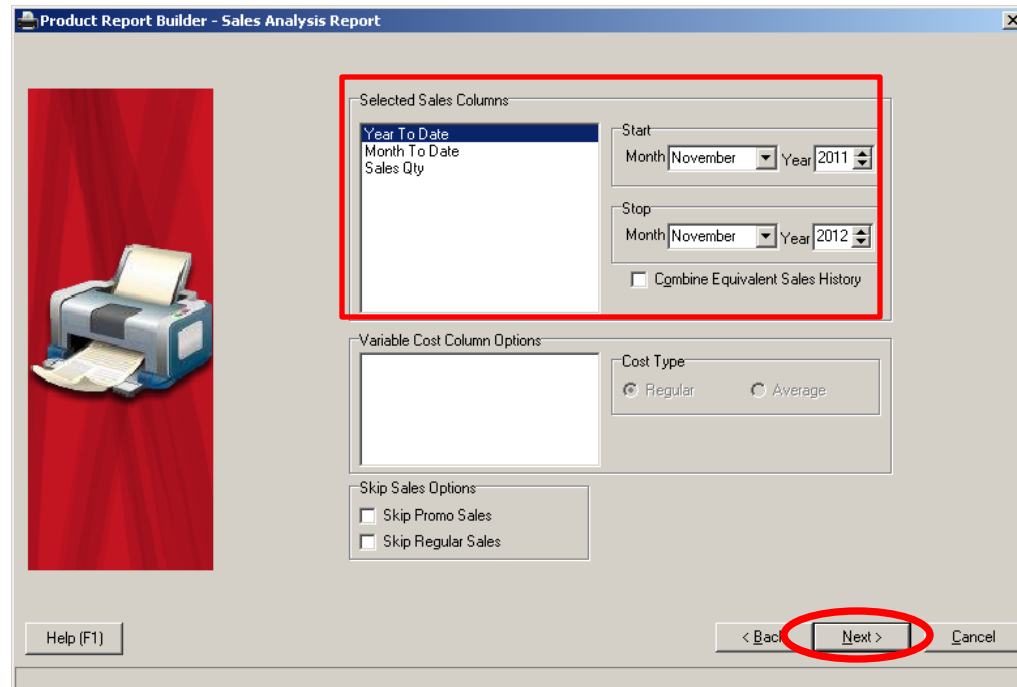
Report Builder: Sales Analysis Report (cont'd)

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



Product Report Builder - Sales Analysis Report

Selected Sales Columns

- Year To Date
- Month To Date
- Sales Qty

Start

Month: November Year: 2011

Stop

Month: November Year: 2012

☐ Combine Equivalent Sales History

Variable Cost Column Options

Cost Type

☒ Regular ☐ Average

Skip Sales Options

☐ Skip Promo Sales

☐ Skip Regular Sales

Help (F1) < Back Next > Cancel

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

Product Report Builder - Sales Analysis Report

Primary Sort Options:

- ☒ None
- ☐ Product Filter
- ☐ Price Group
- ☐ Vendor
- ☐ Category
- ☐ Equivalent Group
- ☐ Fineline
- ☐ Department
- ☐ Purchase Order
- ☐ Bin Location
- ☐ GL Account

Secondary Sort Options:

- ☒ Bar Code
- ☐ CODE 1
- ☐ Equivalent Group
- ☐ Quantity
- ☐ V.I.N.
- ☐ CODE 2
- ☐ Expected Profit
- ☐ Extended Retail
- ☐ Description
- ☐ DIN
- ☐ Profit
- ☐ Extended Cost
- ☐ Bin Location
- ☐ Price Group
- ☐ Sales

Report Selection:

- ☒ Report
- ☐ Export To Delimited File

Report Type:

- ☒ Detail
- ☐ Summary

Report Options:

Report Presentation:

Output Options:

- ☒ 1 Preview
- ☐ 2 Print

Preview

Printer Setup

Help (F1) Save Settings ☒ Standard ☐ End Of Day ☐ Save As Save Settings Reset Settings < Back Next Report > 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:



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

OR

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

28. Click the OK button in the Print options window



29. Click the Exit icon button when complete

Zoom % 140.00Page # 1Page 1 of 2

(04:4) 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	
00166670072	PLANTUR 25 ZHP FINE	010460	2	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.000	0.000
00166670073	PLANTUR 25 ZHP COL H	010429	2	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.000	0.000
00166670074	PLANTUR 25 THE CAFFE	010427	2	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.00	0.000	0.000
01159901550	SCALPITIN ANTI-ITCH	400613	3	64.19	57.030	16.46	11.39	64.19	57.030	16.46	11.39	13.00	13.00	13.00
02179633061	OBXZ INEADUTT INAMP0	561569	1	13.50	9.240	4.04	24.62	13.50	9.240	4.04	24.62	2.000	2.000	2.000
02179633065	OBXZ COCOBUT INAMP00	561571	1	13.57	14.360	5.11	16.62	13.57	14.360	5.11	16.62	2.000	2.000	2.000
02179633010	OBXZ VANILLA INAMP00	561565	3	28.97	14.360	6.61	21.52	28.97	14.360	6.61	21.52	3.000	3.000	3.000
03700006232	N41 CLASSIC CLEAN SH	911254	3	64.12	42.500	21.62	33.72	64.12	42.500	21.62	33.72	6.000	6.000	6.000
03700006233	N41 CITRUS SWEET SH	911004	3	5.99	5.200	0.71	11.05	5.99	5.200	0.71	11.05	1.000	1.000	1.000
03700006235	N41 XTR VOLUME SHMP	911092	3	23.37	16.060	7.31	21.20	23.37	16.060	7.31	21.20	3.000	3.000	3.000
03700006236	N41 REFRESH SHMP 410	911147	3	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.000	0.000	0.000
03700006237	N41 DRY SCALP CARE 1	911026	3	31.66	11.300	11.10	24.54	31.66	11.300	11.10	24.54	4.000	4.000	4.000
03700006239	N41 DRY CARE SHMP	911007	3	5.99	5.200	0.71	11.05	5.99	5.200	0.71	11.05	1.000	1.000	1.000
03700006239	N41 CLASSIC CLEAN 1	911121	3	40.75	17.590	12.16	21.29	40.75	17.590	12.16	21.29	5.000	5.000	5.000
03700006240	N41 SHW & SILKY 1 I	911139	3	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.000	0.000	0.000
03700006241	N41 DRY SCALP CARE 1	911140	3	46.74	11.757	14.90	31.06	46.74	11.757	14.90	31.06	6.000	6.000	6.000
03700006242	N41 DRY CARE 1 IN 1	911155	3	23.37	16.013	7.36	21.40	23.37	16.013	7.36	21.40	3.000	3.000	3.000
03700006246	N41 SHW & SILKY 1 I	911106	3	14.60	11.037	3.64	24.62	14.60	11.037	3.64	24.62	2.000	2.000	2.000
03700006247	N41 OCEAN LIFT 1 IN	911114	3	14.60	11.030	3.59	24.46	14.60	11.030	3.59	24.46	2.000	2.000	2.000
03700006246	N41 OCEAN LIFT 1 IN	911163	3	17.30	11.400	5.90	33.95	17.30	11.400	5.90	33.95	2.000	2.000	2.000
03700006249	N41 REFRESH 1 IN 1 4	911171	3	14.60	11.030	3.59	24.46	14.60	11.030	3.59	24.46	2.000	2.000	2.000
03700006262	GILLETTE SHAMP00 - D	410976	1	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.000	0.000	0.000
03700006270	GILLETTE SHAMP00 - C	410956	1	0.00	0.000	0.00	0.00	0.00	0.000	0.00	0.00	0.000	0.000	0.000
0550060741	DOVE THERAPY SHMP 355	004600	5	24.95	12.046	11.90	24.06	24.95	12.046	11.90	24.06	5.000	5.000	5.000