Report Generator

Creating Reports

The report generator is a very powerful tool allowing you to pull your own reports based on the data available. However, this power comes with increased complexity. Although this documentation may seem long, it aims to unlock your ability to generate your own reports and pull information that otherwise isn't currently accessible to you in a meaningful way.

Report Type

The first option in the report generator is the report type. There are currently two types of reports available:

- Sales
- Inventory

These different types of reports change the available data you can pull from when building your report.

Static Columns

Once you've selected a report type lists of column names will appear, depending on which report type you selected. Each column will have a different title, based on the data associated with the report type.

These columns represent the **unique** values you want to appear in your query. For example, if you were to select *Account Number* from the customer columns for a sales report, you would get one row for each account number. However, if you select both *Account Number* from the customer columns and *Category* from the item columns, you'll get one row for each category each customer has sales for.

Aggregate Columns

Aggregate columns are the values that require calculations to be made. This is where most of the information you'll come looking for lives.

Currently there are 4 types of aggregate columns:

- SUM( ) - The sum of all the values in the rows of the data, that make up one row of your report
- AVG( ) - The average of all the values in the rows of the data, that make up one row of your report.
- COUNT( ) - The number of values in the rows of the data, that make up one row of your report.
- CALC( ) - Special values that are calculated based on predetermined formulas.

Date Range

The date range allows you to specify a date range for the data in your report, if applicable.

For inventory reports these fields are still present, however the inventory data has no date associated with it. Therefore changing these values will have no effect.

Static Column Filters

Static column filters allow you to filter your results based on the static columns. For example, if you wanted all the categories that customer '123456' has sold, you would select both the *Account Number* and the *Categories* columns, and then filter based on *Account Number is equal to 123456*.

Note that in order to have a column show up in a filter, the filter must be created after the column is selected. If you don't see the column you wish to filter on and you are sure its selected, remove the filter and add a new one.

Prebuilt Reports

Prebuilt reports offer additional reporting options that do not fit into the capabilities of the standard report generator. These reports are typically requested by one customer, and then made available to everyone.

Currently, the following prebuilt reports are available:

- Sales Table
- Historic Sales
- Historic Inventory

Sales Table

The sales table report used to be featured on the FlightDeck Dashboard. However, the report takes considerable time to load properly, and was slowing down the performance for everyone as the FlightDeck Dashboard is a main landing point for many users.

The Sales Summary By Filter Table allows you to drill down into your sales for the past month, offering monthly and yearly comparisons across your sales.

Columns

The following columns are present in every table under this panel:

MTD Sales

The total value of all sales for this row so far this month.

MTD $ Difference ($ Diff.)

he difference in sales so far this month compared to last month.

MTD % Difference (% Diff.)

The difference in sales so far this month compared to last month, as a percent value.

MTD GP%

The gross profit so far this month, as a percent value

MTD GP% Difference (Diff.)

The difference in gross profit so far this month compared to last month, as a percent value.

MTD% Returns ($ Ret.)

The number of items that have been returned this month compared to the number of items that have been bought this month, as a percent value

YTD Sales

The total value of all sales for this row so far this year.

YTD $ Difference ($ Diff.)

The difference in sales so far this year compared to last year.

YTD % Difference (% Diff.)

The difference in sales so far this year compared to last year, as a percent value.

YTD GP%

The gross profit so far this year, as a percent value

YTD GP% Difference (Diff.)

The difference in gross profit so far this year compared to last year, as a percent value.

YTD% Returns (% Ret.)

The number of items that have been returned this year compared to the number of items that have been bought this year, as a percent value

Tables

The following tables are available within this Sales Summary By Filter panel

Customer

A listing of each customer you have sold a product to in the current time frames, with their account number and name available. Drills down on the "Account" column.

Customer > Category

A listing of each category that has been sold to the parent customer with the category and description available. Drills down on the "Category" column.

Customer > Category > Part

A listing of each part that belongs to the parent category, that has been sold to the parent customer with the item code and description available.

Item Category

A listing of all the item categories you have sold within the current time frames, with their category and description available. Drills down on the "Category" column.

Customer Territory

A listing of all the territory values for which you've sold to a related customer within the current time frames, with the territory value available. Drills down on the "Territory" column.

Territory > Customer

A listing of all the customers for which you've sold a product in the current time frame belonging to the parent territory value, with the account number and name available.

Industry Code

A listing of all the industry code values for which you've sold to a related customer within the current time frames, with the industry code available. Drills down on the "Industry Code" column.

Discount Group

A listing of all the discount group values for which you've sold to a related customer within the current time frames, with the discount group value available. Drills down on the "Discount Code" column.

Discount Group > Customer

A listing of all the customers for which you've sold a product in the current time frame belonging to the parent discount group value, with the account number and name available.

ACA Category

A listing of all the available ACA categories for which you've sold a product within the current time frames, with the category and description being available. Drills down on the "Category" column.

ACA Category > ACA Subcategory

A listing of all the available ACA subcategories related to the parent ACA category for which you've sold a product to a customer within the current time frames, with the SubCategoryID and SubCategory Name available. Drills down on the "SubCategoryID" column.

ACA Category > Category

A listing of all your product categories for which you have a sold aproduct that matches the parent ACA Category within the current time frame.

ACA Category > ACA Subcategory > Products

A listing of all the products associated with the parent ACA subcategory for which you've sold to a customer within the current time frames, with the item code and description available.

Class

A listing of all the classes for which you've sold a product to a customer within the current time frames, with the class ID and class name available.

Class > Subclass

A listing of all the subclasses related to the parent class for which you've sold a product to a customer within the current time frames, with the subclass name available.

Historic Sales

The historic sales report focuses on a particular branch, and offers an overview of sales performance for the past 2-3 years. This includes gross income, net income, and GP% broken down by year and by month.

This double breakdown of by year by month isn't available via the standard report generator, and doesn't play nicely with data coming from multiple branches. Therefore it is available as a prebuilt report with a single branch limitation.

Historic Inventory

The historic inventory report features a by year by month breakdown like the historic sales table, however this chart focuses on the value of the inventory for the selected branches over time. Each month, the Counterpoint Cloud Platform takes a snapshot of your inventory on the 1st and saves it for the purpose of this graph. This allows us to offer a historical representation of your inventory to draw comparisons and trends from.

Additionally, a month by month graph is available to better visualize trends in inventory value over time.

In some scenarios, it may be possible to import additional historical data from outside the Counterpoint Cloud Platform on a one-time basis. For inquiries, contact AMS.

Detailed Sales History

The detailed sales history report gives you a month over month comparison of both sales figures and GP values on a per category basis, for one of more branches.

Detailed Inventory History

The detailed inventory history report gives you a month over month comparison of inventory values and changes on a per category basis, for one or more branches.

Day of Week Sales

Invoice count analysis broken down by day of week, and represented in a bar graph. You can modify the time range used in order to evaluate your busiest days and hours

There are also a number of additional metrics included, by day.

Detailed Sales History

A breakdown of sales based on clerk and based on the group of clerks that represents in-store vs online sales, with some extrapolated data on clerk performance mixed in.

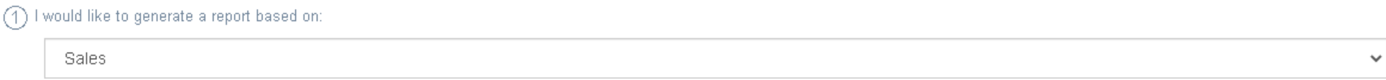
Detailed Sales History

A searchable, per-line breakdown of sales history for the entirety of the dataset available.

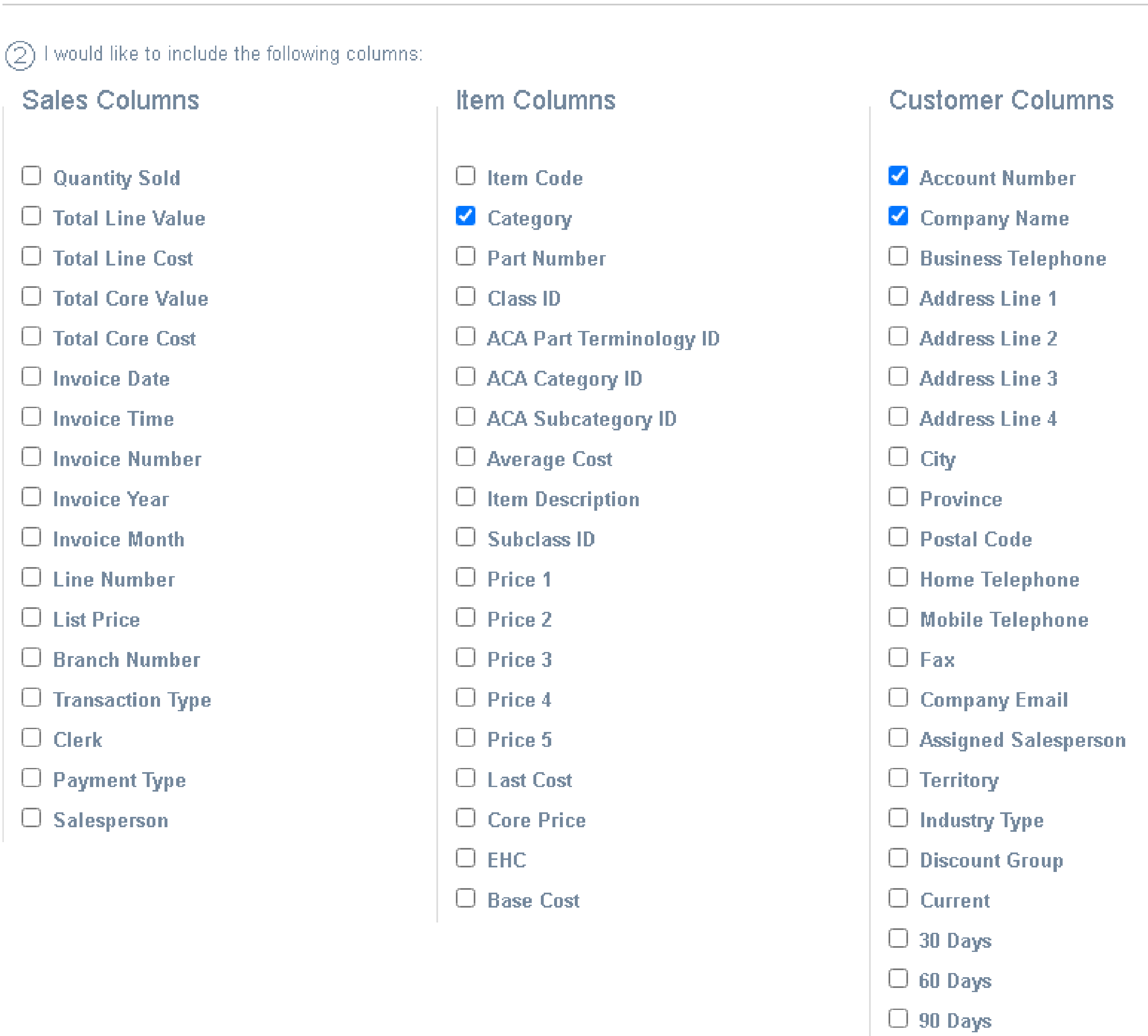
Sample Report

Below are the steps for creating a basic report of sales by customer/category

In Section 1, you will want to select Sales:



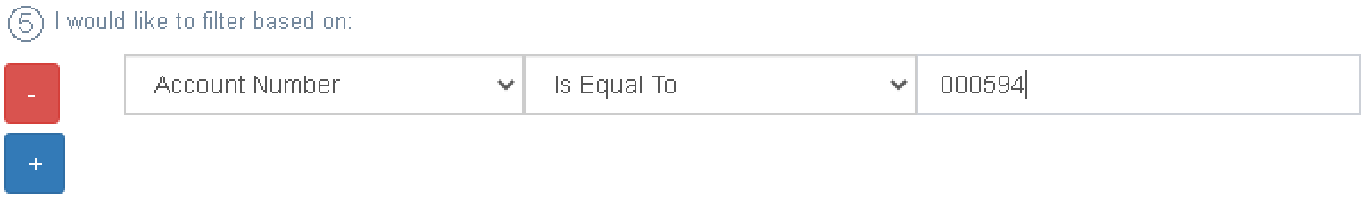
In Section 2, this is where you would select the pieces which you want detail on, and what the sales will be totaled by. In this case, Account Number, Company Name and Category. This means we will get a report by Account Number, Company Name and possibly Category



In Section 3, you pick what totals you want by Account Number, Company Name and Category. In this case, I am going to select SUM(Total Line Value) to get sales dollars and SUM(Total Line Cost) to get cost of sales. This means I will get a report on total sales and cost of sales by Account Number, Company Name, and Category.

Section 4 I'm going to pick a date range. In this case, I'm just selecting last month. Clicking on the calendar in the input field will bring up the calendar date picker.

Finally, in section 5, you can filter the data that will show. As of right now, I have a full report on Sales and Cost of Sales by Customer, Company Name, and Category. If I want to just return info on Brinks, this is where I would make that call-out by selecting to filter on Account Number.



Then, I just need to click the Generate report button and I will get a table below with the information I asked for.

If there are multiple pages, there will be page navigation at the bottom, and if you want to pull it out to excel you just need to press one of the export buttons at the top right of the table.

This is just a quick sample, dates can easily be adjusted and extra detail like category could be left off to get a more summarized total of the customer's sale, but it is a good idea of what you can get from the report generator.

Web Reports

Overview

Web reports allow for the management and distribution of custom reports where the necessary information may not be maintained within the Cloud Platform.

Web reports also allow for the tracking of 'signatures' on reports. Asking the reader to sign a report as read and keeping track of which reports have been read by whom.

Setup and Maintenance

The setup of the report portion of a web report is primarily done by AMS. A user would call AMS and request that a specific report be added to the Counterpoint Cloud web report feed and we would ensure that the report was set up and available for maintenance in the Cloud Platform

Once a report is set up, a user would define which other users are to receive the new report. This maintenance is done in **CP2 Admin > WebReport Management**

Reviewing Reports

When a report is sent, all users set up to receive the report will receive an email from the system indicating that a new report is available. A link within that report will take the user to the report for review.

The report, as viewed in the WebReport viewer is presented in a table format that can be downloaded with a single click of the large blue **Download** button in the top right of the screen.

When viewing the report, the user will be presented with the option to sign the report at the bottom. Once a user signs a report, that signature is tallied and shown when browsing the WebReport listing page.