

# 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.

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