

Sales Analysis

- Customer Sales Reporting

Customer Sales Reporting

As a normal part of working with your customer base there will be times when you need to understand a customers buying habits by category. Counterpoint provides a report specifically for this purpose. The report is accessed via the following menu path.

5. **Sales Analysis...**-> 3. **Sales/Core Reports...**-> 4. **Customer Reporting...**-> 2. **Customer Sales_Returns**

Which brings up the following screen.

COUNTERPOINT

File Edit View Session Config Special Help

Customer Sales/Returns Report

1 Start Date 1901/../.
4 End Date/./.
7 Report Type (D)etail, (S)ummary, (C)ustomer
8 Page Per Customer (Y/N)
9 Report On (\$) Sales Value, (U)nits of Inventory(B)oth
10 Use Actual or Jobber? (A)ctual selling price, (J)obber reference price.
12 Category
14 Counterman
15 Counterman Detail? (Y/N)
16 Stores 01 Y 02 Y

Customers To Select

36	.....	56	.....
38	.....	58	.....
40	.....	60	.....
42	.....	62	.....
44	.....	64	.....
46	.....	66	.....
48	.....	68	.....
50	.....	70	.....
52	.....	72	.....
54	.....	74	.....

Start [Taskbar Icons] Desktop 10:47 AM

Enter data into fields as follows.

1 Start Date – Enter date you would like analysis to begin –hit Enter to include all customer purchases.

4 End Date – Enter date of last day you wish to include in the analysis – hit enter to include all data.

7 Report Type – Enter one of the displayed options as appropriate to your need for this report.

8 Page - Per Customer – Enter **Y** or **N** as appropriate.

9 Report On – Enter One of the displayed options as appropriate to your needs.

10 Use Actual or Jobber – Enter as appropriate to your needs.

12 Category – Enter category to be reported or hit [Enter] to report on all categories.

14 Counterman – Enter Counterman number to report or hit [Enter] to report on all Counterman sales.

15 Counterman Detail – Enter **Y** or **N** as appropriate to your needs.

16 Stores – Prompt will list the stores on your system by branch number. All will have default value of Y change to N as appropriate to your needs.

Fields 36 thru 74 – Enter customer account numbers of all customers you wish to see reported. Hit [Enter] to see all customers reported. Use the Tab key to launch a customer account search if you are unsure of the account number.

When you have entered all fields hit [F1] to run the program.

Report can be displayed on screen or printed out as appropriate to your intended usage.