

# 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.