

Lost Sales Reason Code

Processing

The recording of lost sales now has a Reason Code attached; these reason codes are setup using the menu option **System Utilities > System Setup > Sales Desk > Lost Sale Reason Codes.**

Lost Sale Reason Code Maintenance

Change Mode

1	Reason Code	L	
2	Description	Lost Sale	
3	Include in Sales Total	N	(Y)es/(N)o

Any change? 2.

If the Include in Sales Total flag is set to Y any Lost Sales recorded through invoicing will be added to the Monthly and Weekly sales totals, increasing the demand for the part.

Invoicing

When recording a Lost Sale in the invoicing screen [using F6 after the quantity is entered] a list of the Lost Sale codes will be displayed to select the appropriate reason.

Customer # 000365		Bill To 000365 CANADIAN TRUCK		Tue May 10 2022 13:53:39	
CANADIAN TRUCK REPAIR		Ship Via		Payment Method	
3879 RAILWAY AVE		Notify		Account	
VANCOUVER		Salesman		Transaction Type	
V5X 2P2		GST Lic. #		Invoice	
Phone (780) 888-3244		PST Lic. #			
BC		ON FILE		FOB	
		12345678		PO #	
				Clerk #	
				3 CLERK #3	
				LOST SALE	

line	type	Part Number	Description	Quantity	Eco Fee	Core	plv	Net Price	+/-%	Extension	tax
1											
2											
3											
4											
5											
6											

Line	Type	Part Number	Quantity	Eco Fee	Core	plv	Unit Price	+/-%	Extension	gst/pst
1		BR5	2	.00	.00		21.65		.00	10

Lost Sales Tracking					
Line	Code	Reason for Lost Sale	Line	Code	Reason for Lost Sale
01	B	BRAND	06		
02	L	LOST SALE	07		
03	N	NON-STOCKED	08		
04	P	PRICE	09		
05			10		

Reason for Lost Sale - Please Select by Line # 1.

Sub Total

Reporting

The Lost Sales Detail report allows for the selection of one or all Categories, Customers or Reason Codes for a selected date range

Lost Sales Detail	
1	Category . . . All
3	Reason Code All reasons
5	Customer All customers
6	Start date 1901 / 1 / 12
9	End Date 2099 / 12 / 31

The menu option for this report is **Inventory > Lost Sales/Pickups > Lost Sales Detail Report.**

Running this report will also create an extract file that can be loaded into excel
Z:\html\b1\BLDRP.csv

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