

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 3879 RAILWAY AVE		Ship Via		GERRY JONES	
VANCOUVER		Notify		Salesman	
V5X 2P2		Salesman		FOB	
Phone (780) 888-3244		GST Lic #		PO #	
BC		PST Lic #		Clerk #	
ON FILE		12345678		LOST SALE	
3 CLERK #3				Invoice	

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		

Sub Total	
------------------	--

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

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

Revision #1

Created 19 May 2022 21:59:30 by Jim

Updated 19 May 2022 22:00:51 by Jim