# Sales

**Introduction**

The Sales report topics focus on reports associated with all types of sales information located in CMS.

Items found in the Sales section include:

- → Sales Recap
- → Dollars Shipped
- → Trended Gross Shipments
- → Sales Activity
- → Sales Comparison
- → Customers
- → Products Ordered
- → Prod Line Sales Comparison
- → Product Exception
- → Cust Sales By Prod Line(s)
- → Bank R & T
- → Rep Report
- → Universal Sales Report

**Sales**

This is an example of the Sales option list:

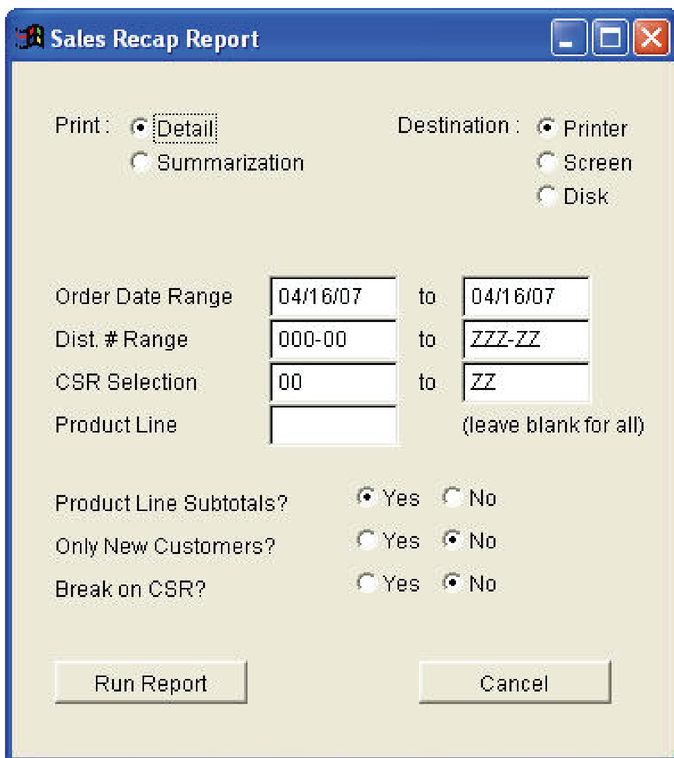

*Continued on next page*

# Sales Recap

**Sales Recap**

Sales Recap lists the sales of Distributors, Associates and CSR's with subtotals for New, Add and Repeat business within the date range selected.

NOTE: It is **recommended** to print this report **daily**, **weekly** or **monthly** to track sales in your office.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Sales Recap from the Reports menu in CMS by clicking on the Sub-menu title Sales.</td></tr>
<tr><td>2</td><td>Click the Sales Recap link.</td></tr>
<tr><td>3</td><td>The Sales Recap Report Screen will appear:<br>

</td></tr>
</table>

*Continued on next page*

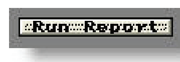
# Sales Recap, cont.

| Step | Action |
|---|---|
| 3, cont. | Select the report option based on the report you would like to generate.<br><br>➢ **Detail** – includes order detail (CSR, Order #, Customer, Product line, New, Add, or Repeat) with subtotals by product line<br>➢ **Summarized** – gives you subtotals by product line only. |
| 4 | ***Destination:***<br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Selection:*** Check the CMS Manual for additional field descriptions.<br><br>➢ ***Order date range –*** Enter a date range to locate sales totals for orders within that range.<br>➢ ***Dist # range –*** Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers.<br>➢ ***CSR Selection –*** Enter the CSR number/code range you would like to appear on the report.<br>➢ ***Product Line –*** Enter the specific product line you would like to see orders for. NOTE: Leave this field blank if you are looking for ALL product lines to appear on the report. |

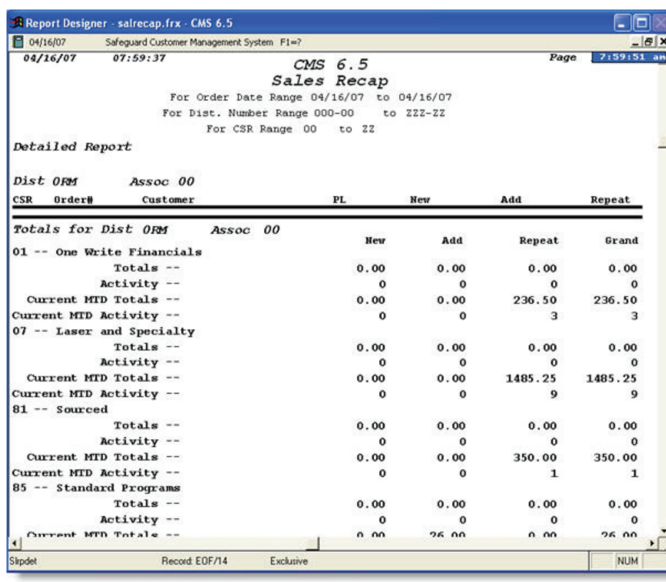
*Continued on next page*

# Sales Recap, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5, cont.</td><td>
Selection, cont:
<ul>
<li>Product Line Subtotals – Using the mouse, select YES if you would like the product lines subtotaled, NO if you don’t.</li>
</ul>
NOTE: Default is set to YES.
<ul>
<li>Only New Customers – Using the mouse, select YES if you want the report to only show order dollars associated with NEW customers, NO if you want all customers.</li>
</ul>
NOTE: Default is set to NO.
<ul>
<li>Break on CSR – Using the mouse, select YES if you want to show a break for each CSR, NO if you don’t.</li>
</ul>
NOTE: Default is set to NO.
</td></tr>
<tr><td>6</td><td>
Run Report:




Click the Run Report button.
</td></tr>
<tr><td>7</td><td>
This is a sample of the Sales Recap Detail report:



</td></tr>
</table>

*Continued on next page*

# Sales Recap, cont.

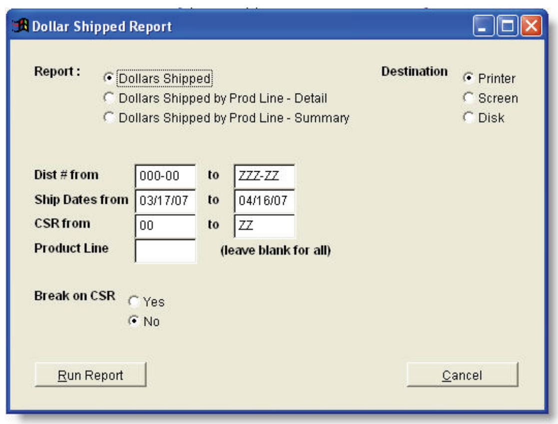
| Step | Action |
|---|---|
| 8 | ***Field Descriptions:***<br><br>→ **Dist** – reflects the Distributor number selected<br>→ **Assoc** – reflects the Associate number selected<br>→ **CSR** – reflects the CSR number/code selected<br>→ **Order #** - reflects the specific order numbers<br>→ **Customer** – displays the customer's name<br>→ **PL** – reflects the Product Lines<br>→ **New** – reflects the dollars associated with New orders<br>→ **Add** – reflects the dollars associated with Add-on orders<br>→ **Repeat** – reflects the dollars associated with Repeat orders<br>→ **Totals** – reflects the dollar amount associated with each category (New, Add, and Repeat) and distributor/associate.<br>→ **Activity** – reflects the number of orders within each category (New, Add, and Repeat).<br>→ **Current MTD Totals** – Displays the current Month to Date totals for each category (New, Add, and Repeat) and distributor/associate.<br>→ **Current MTD Activity** – Displays the current Month to Date activity for the number of orders within each category (New, Add, and Repeat).<br><br>NOTE: MTD totals and activity only shows on the report when running the report for the current month. |
| 9 | To exit or print the report if destination selected was "screen", select the appropriate icon from the taskbar.<br><br>➢ **Door** - Exit<br>➢ **Printer** - Print<br><br><br>Click on the option to select it. |
| 10 | Press the ESC key to exit completely out of reports. |

# Dollars Shipped

**Dollars Shipped** Dollars Shipped report is based on actual ship dates.

It lists all shipped line items in a given date range and Distributor number range.

NOTE: It is recommended to print this report weekly or monthly to track shipped orders in your office.

| Step | Action |
|---|---|
| 1 | Navigate to Dollars Shipped from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Dollars Shipped link. |
| 3 | The Dollars Shipped Report Screen will appear:<br><br>Select the report option based on the report you would like to generate.<br>➢ **Dollars Shipped** – Total dollars shipped, not sub-totaled by product line.<br>➢ **Dollars Shipped by Prod Line** - Detail – Total dollars shipped, sub-totaled by product line, including individual order detail.<br>➢ **Dollars Shipped by Prod Line** – Summary - Total dollars shipped, sub-totaled by product line, summary totals. |



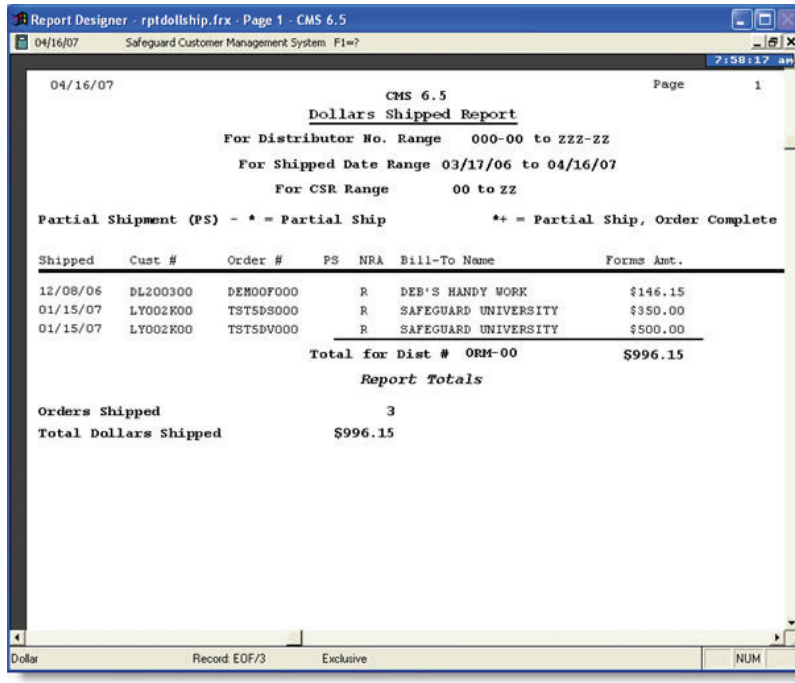
*Continued on next page*

# Dollars Shipped, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 6 | ***Selection:*** Check the CMS Manual for additional field descriptions.<br><br>➢ ***Dist # from/to –*** Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers.<br>➢ ***Ship Dates from/to -*** Enter a date range to locate sales totals for orders within that range.<br>➢ ***CSR from/to –*** Enter the CSR number/code range you would like to appear on the report.<br>➢ ***Product Line –*** Enter the specific product line you would like to see orders for. NOTE: Leave this field blank if you are looking for ALL product lines to appear on the report.<br>➢ ***Break on CSR –*** Using the mouse, select YES if you want to show a break for each CSR, NO if you don't.<br>NOTE: Default is set to NO. |
| 7 | ***Run Report:***<br><br><br>Click the Run Report button. |

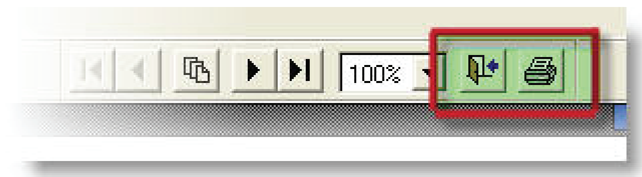
*Continued on next page*

# Dollars Shipped, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>This is a sample of the Dollars Shipped report:<br><br>
</td></tr>
<tr><td>9</td><td>Field Descriptions:<br><br>
→ Shipped – reflects the Distributor number selected<br>
→ Cust # – reflects the customer number<br>
→ Order # – reflects the order number<br>
→ PS – indicates if that particular order was shipped as a partial order, vs. shipped in full – this field denotes an asterisk if partial shipment<br>
→ NRA – reflects if the order was a New, Repeat or Add<br>
→ Bill-To Name – Customer's name located in the Bill-To field on the customer record<br>
→ Forms Amt – reflects the dollars associated with the order<br>
→ Order Shipped – total order count<br>
→ Total Dollars Shipped – reflects the total for all orders that appear on the report</td></tr>
</table>

*Continued on next page*

# Dollars Shipped cont.

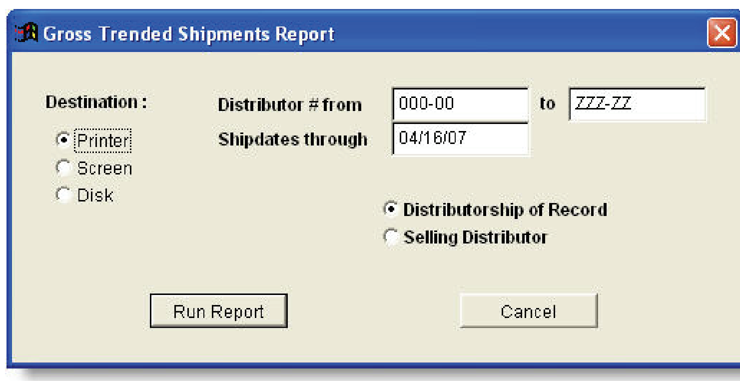
| Step | Action |
|---|---|
| 10 | To exit or print the report if destination selected was "screen", select the appropriate icon from the taskbar.<br><br>➢ **Door** - Exit<br>➢ **Printer** - Print<br><br><br><br>Click on the option to select it. |
| 11 | Press the ESC key to exit completely out of reports. |

# Trended Gross Shipments

**Trended Gross Shipments**

Trended Gross Shipments report compares actual monthly sales figures for shipped orders of a specific period in the present year to figures of the same period in the previous year. The report also shows the percentage of growth as compared to previous year when utilizing the "Set-up Plan" option located in the maintenance menu.

The report breaks down the figures according to each Distributor's/Associate's New/Add, Repeat and total business by month within each product line.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Trended Gross Shipments from the Reports menu in CMS by clicking on the Sub-menu title Sales.</td></tr>
<tr><td>2</td><td>Click the Trended Gross Shipments link.</td></tr>
<tr><td>3</td><td>The Trended Gross Shipments Report Screen will appear:<br>

<br>
Select the report option based on the report you would like to generate.<br>
<ul>
<li>Distributorship of Record – select this option if you are looking for information at the distributorship level. Displays order totals based on the distributor number on the customer screen.</li>
<li>Selling Distributor – select this option if you want the information separated by Associate number. Displays order totals based on the distributor number on the order header.</li>
</ul></td></tr>
</table>

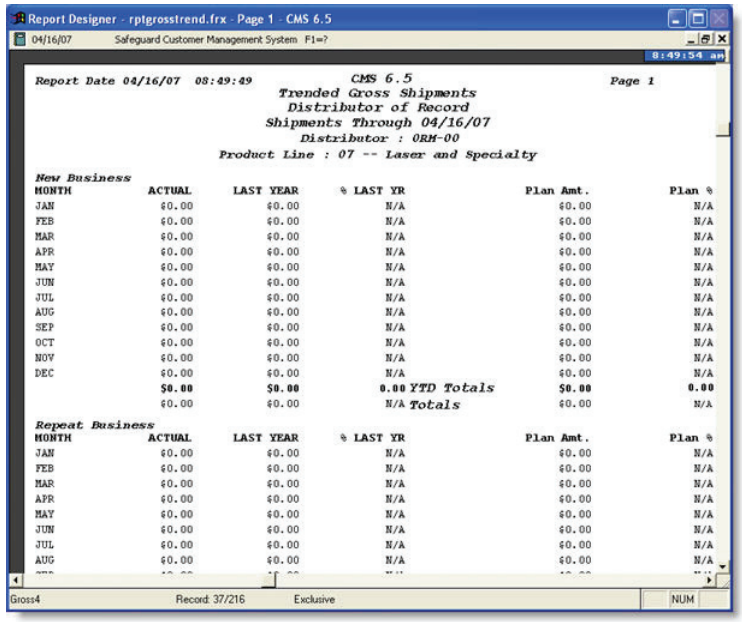
*Continued on next page*

# Trended Gross Shipments, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 6 | ***Selection:*** Check the CMS Manual for additional field descriptions.<br>➢ ***Distributor # from/to –*** Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers.<br>➢ ***Shipdates through -*** Enter a date range to locate sales totals for orders within that range. |
| 7 | ***Run Report:***<br><br><br>Click the Run Report button. |

*Continued on next page*

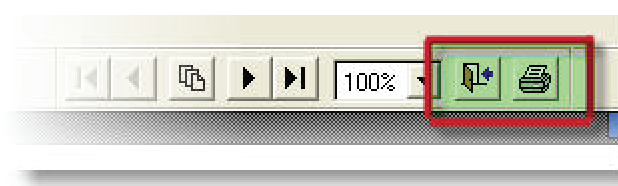
# Trended Gross Shipments, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>This is a sample of the Trended Gross Shipments report:<br>


<table>
<tr><td colspan="7">New Business</td></tr>
<tr><th>MONTH</th><th>ACTUAL</th><th>LAST YEAR</th><th>% LAST YR</th><th></th><th>Plan Amt.</th><th>Plan %</th></tr>
<tr><td>JAN</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>FEB</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>MAR</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>APR</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>MAY</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>JUN</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>JUL</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>AUG</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>SEP</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>OCT</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>NOV</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>DEC</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td></td><td>$0.00</td><td>$0.00</td><td>0.00</td><td>YTD Totals</td><td>$0.00</td><td>0.00</td></tr>
<tr><td></td><td>$0.00</td><td>$0.00</td><td>N/A</td><td>Totals</td><td>$0.00</td><td>N/A</td></tr>
<tr><td colspan="7">Repeat Business</td></tr>
<tr><th>MONTH</th><th>ACTUAL</th><th>LAST YEAR</th><th>% LAST YR</th><th></th><th>Plan Amt.</th><th>Plan %</th></tr>
<tr><td>JAN</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>FEB</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>MAR</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>APR</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>MAY</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>JUN</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>JUL</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
<tr><td>AUG</td><td>$0.00</td><td>$0.00</td><td>N/A</td><td></td><td>$0.00</td><td>N/A</td></tr>
</table>
</td></tr>
<tr><td>9</td><td>Field Descriptions: The output for this report is broken down by product line, with a total for ALL product lines located at the end of the report.<br><br>
→ New Business – reflects the dollars associated with New and Add-on orders<br>
—— Month – reflects the month<br>
—— Actual – reflects the actual sales dollars by a specific month<br>
—— Last Year – reflects prior year sales dollars by a specific month<br>
—— % Last Year – reflects the prior months percentage of growth over this month<br>
—— Plan Amount – reflects the sales dollars that were projected for the year<br>
—— Plan % - reflects the variance between actual and plan</td></tr>
</table>

*Continued on next page*

# Trended Gross Shipments cont.

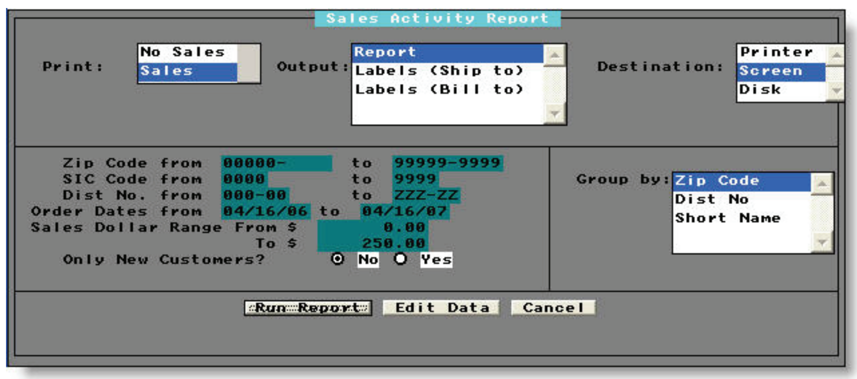
| Step | Action |
|---|---|
| 9, cont. | ***Field Descriptions, cont.:***<br><br>→ **Repeat Business**– reflects the dollars associated with Repeat orders<br>—— *Month* – reflects the month<br>—— *Actual* – reflects the actual sales dollars by a specific month<br>—— *Last Year* – reflects prior year sales dollars by a specific month<br>—— *% Last Year* – reflects the prior months percentage of growth over this month<br>—— *Plan Amount* – reflects the sales dollars that were projected for the year<br>—— *Plan %* - reflects the variance between actual and plan<br>→ **Totals for both New and Repeat** –<br>—— *Month* – reflects the month<br>—— *Actual* – reflects the actual sales dollars by a specific month<br>—— *Last Year* – reflects prior year sales dollars by a specific month<br>—— *% Last Year* – reflects the prior months percentage of growth over this month<br>—— *Plan Amount* – reflects the sales dollars that were projected for the year<br>—— *Plan %* - reflects the variance between actual and plan |
| 10 | To exit or print the report if destination selected was "screen", select the appropriate icon from the taskbar.<br><br>➢ **Door** - Exit<br>➢ **Printer** - Print<br><br><br><br>Click on the option to select it. |
| 11 | Press the ESC key to exit completely out of reports. |

# Sales Activity

**Sales Activity**

The Sales Activity report allows you to retain and generate business from "stale" customers.

This report helps you identify your AA, A, B, C and D customers for follow-up.

| Step | Action |
|---|---|
| 1 | Navigate to Sales Activity from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Sales Activity link. |
| 3 | The Sales Activity Report Screen will appear:<br><br>Select the report option based on the report you would like to generate.<br><br>➢ **No Sales** – select this option when the output is a list of customers who have NOT ordered during a specific period of time.<br>➢ **Sales** – select this option to locate customers who HAVE ordered, and typically to specifically locate who the AA, A, etc customers are. |

*Continued on next page*

# Sales Activity, cont.

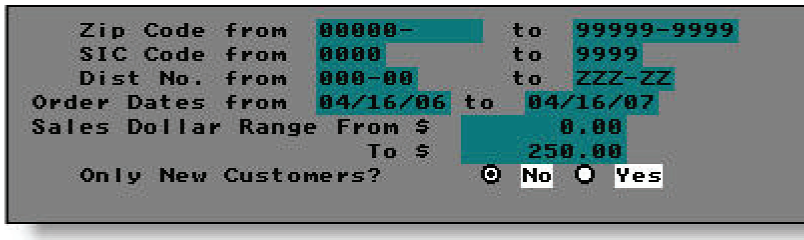
| Step | Action |
|---|---|
| 4 | ***Output:***<br><br>➢ **Report** – select this option if a report onscreen or hardcopy is required<br>➢ **Labels (Ship to)** – select this option if the output will print labels using the customer's ship to address located on the customer record<br>➢ **Labels (Bill to)** – select this option if the output will print labels using the customer's bill to address located on the customer record |
| 5 | ***Destination:***<br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |

*Continued on next page*

# Sales Activity, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

***Select from the following criteria:*** The criteria shown in the picture below is what appears when selecting *Sales* as the output option.




- **Zip Code from/to** – Enter the desired zip code range for the report.
- **SIC Code from/to** – Enter the desired SIC code range for the report. NOTE: this information is pulled using the SICs selected on the customer record.
- **Dist No. from/to** – Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers.
- **Order Dates from/to** – Enter a date range to locate sales totals for orders within that range.
- **Only New Customers** – Using the mouse, select either YES if you want only the new customers sales/no sales to appear, or NO if you want all on the report.

**No Sales Report** – these fields are specific to the *No Sales* output report.

- **No Sales Since** – Enter a start date of when the customer[s] placed their last order. The report will pull all information starting from that date and ending with today's date.

**Sales Report** – these fields are specific to the *Sales* output report.

- **Sales Dollar Range From $** - Enter a starting sales dollar range to locate sales totals for orders within that range.
- **To $** - Enter a starting sales dollar range to locate sales totals for orders within that range.

</td></tr>
</table>

*Continued on next page*

# Sales Activity, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

***Group by:***


- **Zip Code** – allows you to group the report by zip code
- **Dist No** – allows you to group the report by distributor number
- **Short Name** – allows you to group the report by CMS short name that is located on the customer record

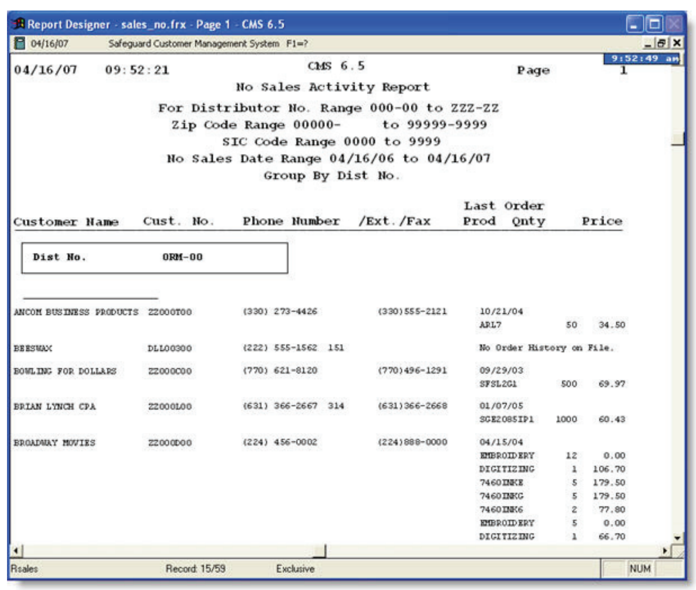
</td></tr>
<tr><td>8</td><td>

***Run Report:***


Click the Run Report button.

</td></tr>
<tr><td>9</td><td>

This is a sample of the Sales Activity report using *Sales* as the desired output:




</td></tr>
</table>

*Continued on next page*

# Sales Activity, cont.

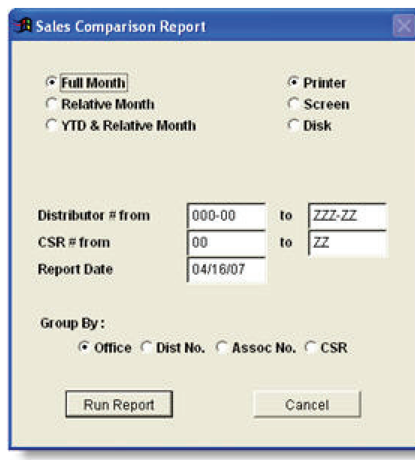
| Step | Action |
|---|---|
| 10 | ***Field Descriptions:*** These fields relate to the Sales report output – check the CMS Manual for additional field descriptions.<br><br>→ **Customer Name** – reflects the customer's name located on the customer record<br>→ **Cust. No.** – reflects the customer number CMS creates for each customer<br>→ **Phone Number /Ext./ Fax** – reflects the phone, fax and extension that resides on the customer record<br>→ **Last Prod** – reflects the last product ordered<br>→ **Order Qnty** – reflects the order quantity<br>→ **Price** – reflects the total forms amount for the order |
| 11 | To exit or print the report if destination selected was "screen", select the appropriate icon from the taskbar.<br><br>➢ **Door** - Exit<br>➢ **Printer** - Print<br><br><br><br><br>Click on the option to select it. |
| 12 | Press the ESC key to exit completely out of reports. |

# Sales Comparison

**Sales Comparison**

The Sales Comparison report compares one month's sale figures to the same month in the prior year.

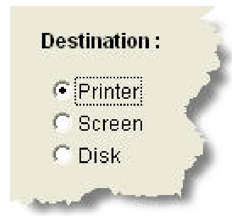
The report shows how sales are doing in comparison to last year and gives the percentage of growth.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Sales Comparison from the Reports menu in CMS by clicking on the Sub-menu title Sales.</td></tr>
<tr><td>2</td><td>Click the Sales Comparison link.</td></tr>
<tr><td>3</td><td>The Sales Comparison Report Screen will appear:<br>


<br>Select the report option based on the report you would like to generate.<br>
<ul>
<li>Full Month – select this option to view sales for an entire month. Displays the entire month and the entire month from the previous year.</li>
<li>Relative Month – select this option to view sales for the current month and the same month from the prior year</li>
<li>YTD & Relative Month – select this option to view Relative month sales as well as the year-to-date sales</li>
</ul></td></tr>
</table>

*Continued on next page*

# Sales Comparison, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Selection:*** Check the CMS Manual for additional field descriptions.<br><br>➢ ***Distributor # from/to -*** Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers.<br>➢ ***CSR # from/to -*** Enter the CSR number/code range you would like to appear on the report.<br>➢ ***Report Date –*** Enter the starting date for the report comparison. The ending date will be today's date. |
| 6 | ***Group By:*** Allows you to specify how the report output will be grouped.<br><br>→ **Office –** allows you to group the report by distributorship<br>→ **Dist No. -** allows you to group the report by distributor number<br>→ **Assoc. No. –** allows you to group the report by associate number<br>→ **CSR –** allows you to group the report by CSR number |

*Continued on next page*

# Sales Comparison, cont.

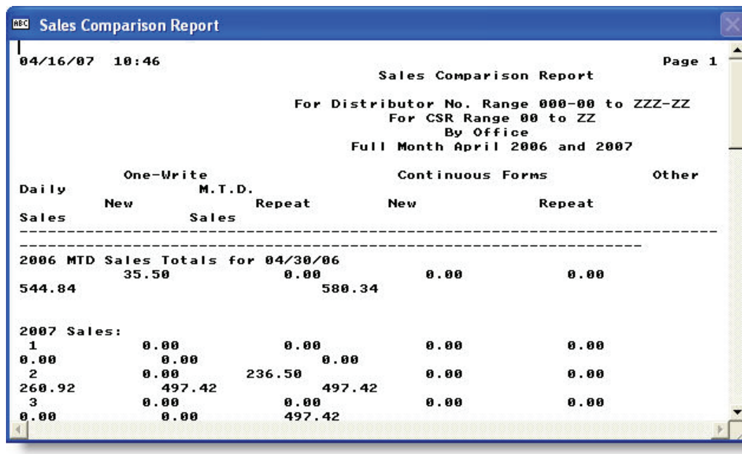
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

***Run Report:***


Click the Run Report button.

</td></tr>
<tr><td>8</td><td>

This is a sample of the Sales Comparison report using *Full Month* as the desired output:




</td></tr>
<tr><td>9</td><td>

***Field Description:*** These fields relate to the Sales report output – check the CMS Manual for additional field descriptions.

**One-Write** – reflects dollars associated with One-Write orders, New and Repeat.

- → **New** – Displays New and Add-On business
- → **Repeat** – Displays Repeat business

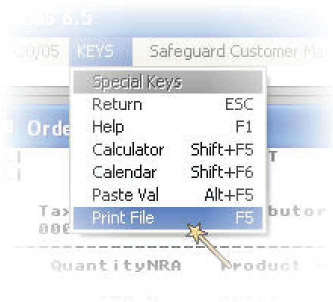
**Continuous** – reflects dollars associated with Continuous orders, New and Repeat.

- → **New** – Displays New and Add-On business
- → **Repeat** – displays Repeat business

</td></tr>
</table>

*Continued on next page*

# Sales Comparison, cont.

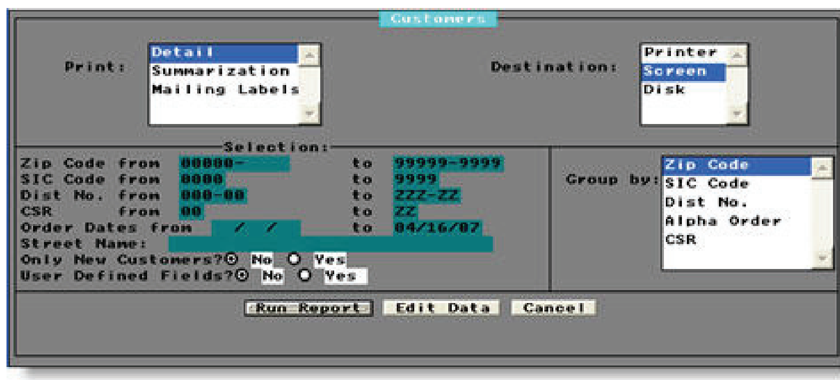
| Step | Action |
|---|---|
| 9, cont. | ***Field Description, cont.:***<br><br>**Other** – reflects dollars associated with all other products lines **except** One-Write orders, New and Repeat.<br>→ **New** – Displays New and Add-On business<br>→ **Repeat** –Displays Repeat business |
| 10 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br> |
| 11 | Press the ESC key to exit completely out of reports. |

# Customers

**Customers**

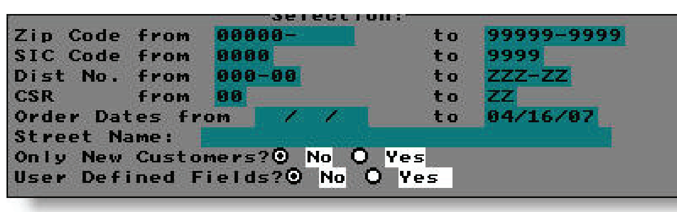
This detailed report lists sales totals in the selected ranges and includes all orders placed by individual customer.

The report lists sales totals but does not include order history when you select Summarization.

| Step | Action |
|---|---|
| 1 | Navigate to Customers from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Customers link. |
| 3 | The Customers Report Screen will appear:<br><br>Select the report option based on the report you would like to generate.<br>➢ **Detail** – select this option to view full details, including order history.<br>➢ **Summarization** – select this option to view a summary of the information [sales totals only].<br>➢ **Mailing Labels** - select this option to create a list of names to generate mailing labels. NOTE: This option offers a Bill-to and Ship-to field used to select the mailing address for the labels. |

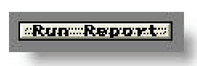
*Continued on next page*

# Customers, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Select from the following criteria:*** The criteria shown in the picture below is what appears when selecting *Sales* as the output option.<br><br><br>➢ **Zip Code from/to** – Enter the desired zip code range for the report<br>➢ **SIC Code from/to** – Enter the desired SIC code range for the report. NOTE: this information is pulled using the SICs selected on the customer record<br>➢ **Dist No. from/to** – Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers<br>➢ **CSR** – Enter the CSR number/code range you would like to appear on the report. |

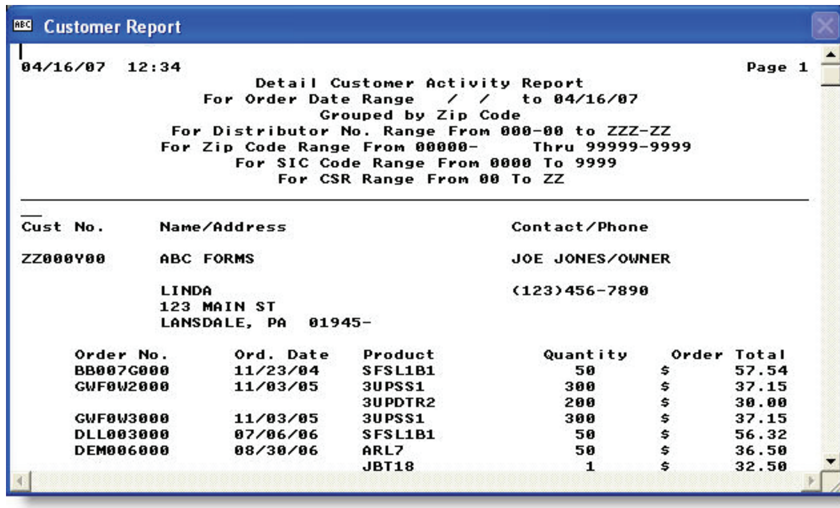
*Continued on next page*

# Customers, cont.

| Step | Action |
|---|---|
| 5, cont. | ***Select from the following criteria, cont.:***<br><br>➢ **Order Dates from/to –** Enter a date range to locate sales totals for orders within that range.<br>➢ **Street Name –** Use this field to locate specific customers on a street [i.e. all customers who are on Main Street].<br>➢ **Only New Customers –** Using the mouse, select either YES if you want only the new customers to appear, or NO if you want all on the report.<br>➢ **User Defined Fields –** Use this field in conjunction with previously defined UDFs specified on the customer record to locate customers with a specific UDF. |
| 6 | ***Group By:*** Allows you to specify how the report output will be grouped.<br><br>→ **Zip Code –** allows you to group the report by Zip Code<br>→ **SIC Code -** allows you to group the report by SIC code<br>→ **Dist No. -** allows you to group the report by distributor number<br>→ **Alpha Order – allows you to group the report by customer name**<br>→ **CSR –** allows you to group the report by CSR number |
| 7 | ***Run Report:***<br><br><br>Click the Run Report button. |

*Continued on next page*

# Customers, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>This is a sample of the Customers report using Detail as the desired output:<br><br>


</td></tr>
<tr><td>9</td><td>Field Description: These fields relate to the Sales report output – check the CMS Manual for additional field descriptions.<br><br>
→ Cust. No – reflects the customer number assigned to this customer by CMS.<br>
→ Name/Address – reflects the customer’s business name and address.<br>
→ Contact/Phone – reflects the customer’s contact name and phone number.<br>
→ Order No.- reflects the order associated with the customer.<br>
→ Order Date – reflects the corresponding order date.<br>
→ Product – reflects the corresponding product[s] by order<br>
→ Quantity – reflects the corresponding order quantity by order<br>
→ Order Total – reflects the total forms amount.</td></tr>
</table>

*Continued on next page*

# Customers, cont.

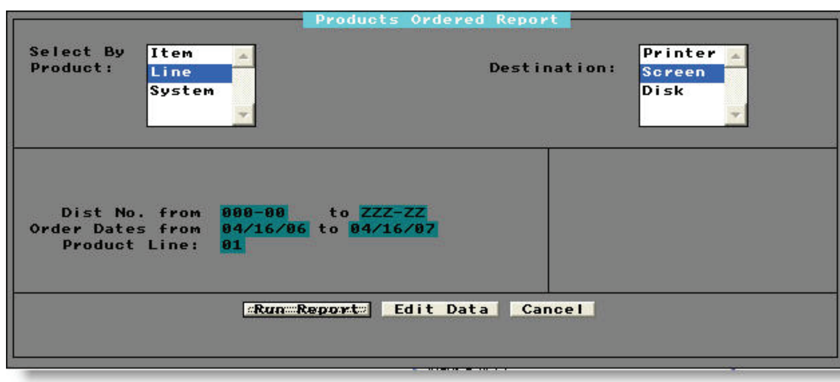
| Step | Action |
|---|---|
| 9, cont. | ***Field Description, cont.:***<br><br>→ **Totals –** reflects the grouped separation marker based on what was selected.<br>—— *Zip Code* – reflects the Zip Code if grouped by Zip Code<br>—— *SIC Code* **-** reflects the SIC Code if grouped by SIC Code<br>—— *Dist No.* **-** reflects the Distributor Number if grouped by distributor number<br>—— *Alpha Order* **–** reflects the customer name data in alphabetical order if grouped by Alpha Order<br>—— *CSR* **-** reflects the CSR code/number if grouped by CSR<br>➢ *Total Activity* – reflects the total forms amount by grouping<br>➢ *Total Customers* – reflects the total number of customers by grouping<br>➢ *Total Orders* – reflects the total number of orders by grouping |
| 10 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br> |
| 11 | Press the ESC key to exit completely out of reports. |

# Products Ordered

**Products Ordered**

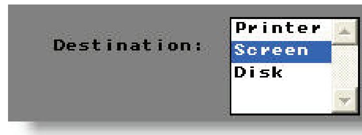
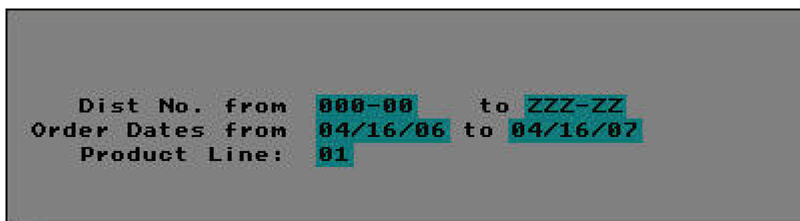
This report allows you to focus on sales by product. You can find order history and sales totals associated with a product at three different levels; Item [product code], Line [product line] or System [system code].

When running this report, you are limited to one result, so if multiple product lines are the desired outcome, you will need to run the report multiple times, changing the product line variable.

| Step | Action |
|---|---|
| 1 | Navigate to Products Ordered from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Product Ordered link. |
| 3 | The Products Ordered Report Screen will appear:   Select the report option based on the report you would like to generate.<br>➢ **Item** – select this option to view details associated with a specific product code.<br>➢ **Line** – select this option to view details associated with a specific product line.<br>➢ **System** - select this option to view details associated with a specific system code. |

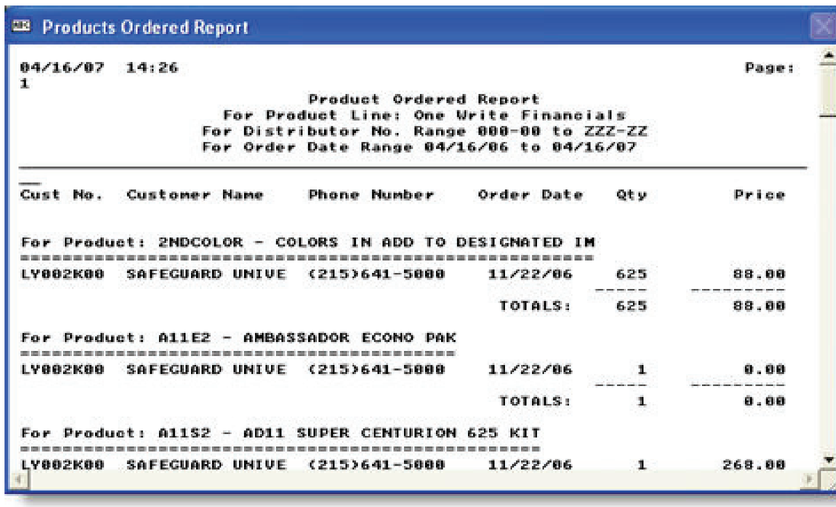
*Continued on next page*

# Products Ordered, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Select from the following criteria:*** The criteria shown in the picture below is what appears when selecting *Line* as the output option. Access the CMS Manual for additional options.<br><br><br>➢ **Dist No. from/to** – Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers<br>➢ **Order Dates from/to –** Enter a date range to locate sales totals for orders within that range.<br>➢ **Product Line –** Enter the two-digit product line<br>**Additional options:** Based on the initial selection<br>➢ **Product** – Enter the CMS product code<br>➢ **System** – Enter the five-digit system code located in the product file in CMS |

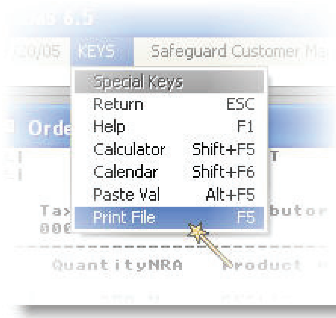
*Continued on next page*

# Products Ordered, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Run Report:<br><br><br>Click the Run Report button.</td></tr>
<tr><td>7</td><td>This is a sample of the Product Ordered report using Line as the desired output:<br><br>Products Ordered Report<br>04/16/07 14:26 Page: 1<br>Product Ordered Report<br>For Product Line: One Write Financials<br>For Distributor No. Range 000-00 to ZZZ-ZZ<br>For Order Date Range 04/16/06 to 04/16/07<br>Cust No. Customer Name Phone Number Order Date Qty Price<br>For Product: 2NDCOLOR - COLORS IN ADD TO DESIGNATED IM<br>LY002K00 SAFEGUARD UNIVE (215)641-5000 11/22/06 625 88.00<br>TOTALS: 625 88.00<br>For Product: A11E2 - AMBASSADOR ECONO PAK<br>LY002K00 SAFEGUARD UNIVE (215)641-5000 11/22/06 1 0.00<br>TOTALS: 1 0.00<br>For Product: A11S2 - AD11 SUPER CENTURION 625 KIT<br>LY002K00 SAFEGUARD UNIVE (215)641-5000 11/22/06 1 268.00</td></tr>
<tr><td>8</td><td>Field Description: These fields relate to the Line report output – check the CMS Manual for additional field descriptions.<br><br>→ Cust. No – reflects the customer number assigned to this customer by CMS.<br>→ Customer Name – reflects the customer’s business name<br>→ Phone Number – reflects the customer’s phone number<br>→ Order Date – reflects the date associated with the order<br>→ Qty – reflects the order quantity<br>→ Price – reflects the total forms amount by order<br>→ For Product – reflects the product code and description</td></tr>
</table>

*Continued on next page*

# Products Ordered, cont.

| Step | Action |
|---|---|
| 9 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br> |
| 10 | Press the ESC key to exit completely out of reports. |

# Prod Line Sales Comparison

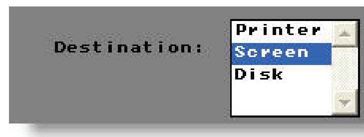
**Prod Line Sales Comparison**

The Prod Line Sales Comparison, or Product Line Sales Comparison, report creates an output showing what the overall sales are by product line. Results reflect either YTD or Monthly comparison for each product line.

| Step | Action |
|---|---|
| 1 | Navigate to Prod Line Sales Comparison from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Prod Line Sales Comparison link. |
| 3 | The Prod Line Sales Comparison Report Screen will appear:<br><br><br>Select the report option based on the report you would like to generate.<br>➢ **Y.T.D.** – select this option to view YTD sales totals that are compared to previous YTD sales.<br>➢ **Monthly** – select this option to view Monthly sales totals that are compared to previous year monthly sales. |

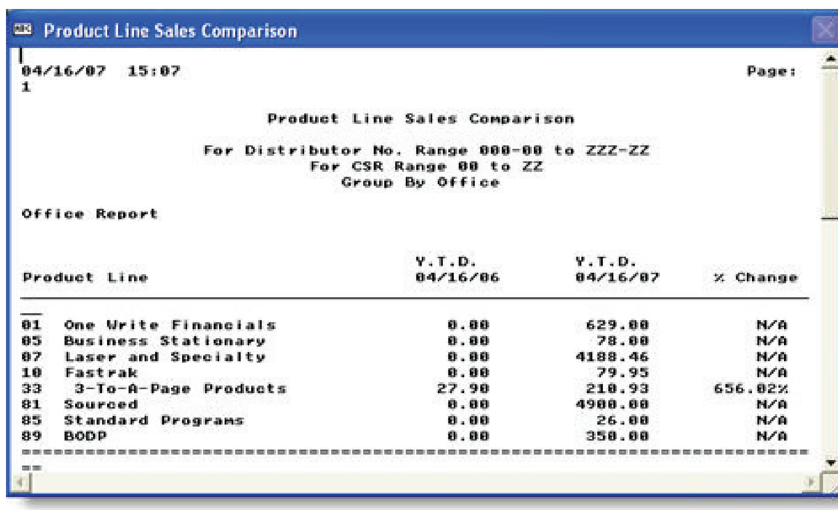
*Continued on next page*

# Prod Line Sales Comparison, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Select from the following criteria:*** The criteria shown in the picture below is what appears when selecting *YTD* as the output option. Access the CMS Manual for additional options.<br><br>➢ **Dist No. from/to** – Enter the Distributor number range you would like to appear on the report. This includes specific Associate numbers<br>➢ **Enter Date for Report –** Enter the date necessary to display the desired output<br>➢ **CSR –** Enter the two-digit CSR number/code<br>**Additional options:** Based on the initial selection<br>➢ **Enter Month/Year for Report** – Enter the date necessary to display the desired output |

*Continued on next page*

# Prod Line Sales Comparison, cont.

| Step | Action |
|---|---|
| 6 | ***Group By:*** Allows you to specify how the report output will be grouped.<br><br>→ **Office –** allows you to group the report by distributorship<br>→ **Dist # -** allows you to group the report by distributor number<br>→ **Assoc # –** allows you to group the report by associate number<br>→ **CSR –** allows you to group the report by CSR number |
| 7 | ***Run Report:***<br><br>Click the Run Report button. |
| 8 | This is a sample of the Prod Line Sales Comparison report using *YTD* as the desired output, grouped by Office:<br> |

Product Line Sales Comparison

04/16/07 15:07 Page: 1

Product Line Sales Comparison

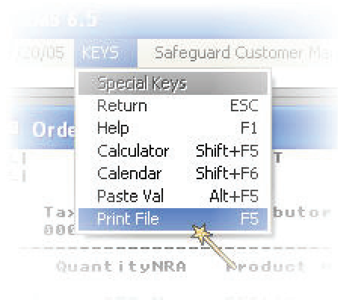
For Distributor No. Range 000-00 to ZZZ-ZZ
For CSR Range 00 to ZZ
Group By Office

Office Report

| Product Line | | Y.T.D. 04/16/06 | Y.T.D. 04/16/07 | % Change |
|---|---|---|---|---|
| 01 | One Write Financials | 0.00 | 629.00 | N/A |
| 05 | Business Stationary | 0.00 | 78.00 | N/A |
| 07 | Laser and Specialty | 0.00 | 4188.46 | N/A |
| 10 | Fastrak | 0.00 | 79.95 | N/A |
| 33 | 3-To-A-Page Products | 27.90 | 210.93 | 656.02% |
| 81 | Sourced | 0.00 | 4900.00 | N/A |
| 85 | Standard Programs | 0.00 | 26.00 | N/A |
| 89 | BODP | 0.00 | 350.00 | N/A |

*Continued on next page*

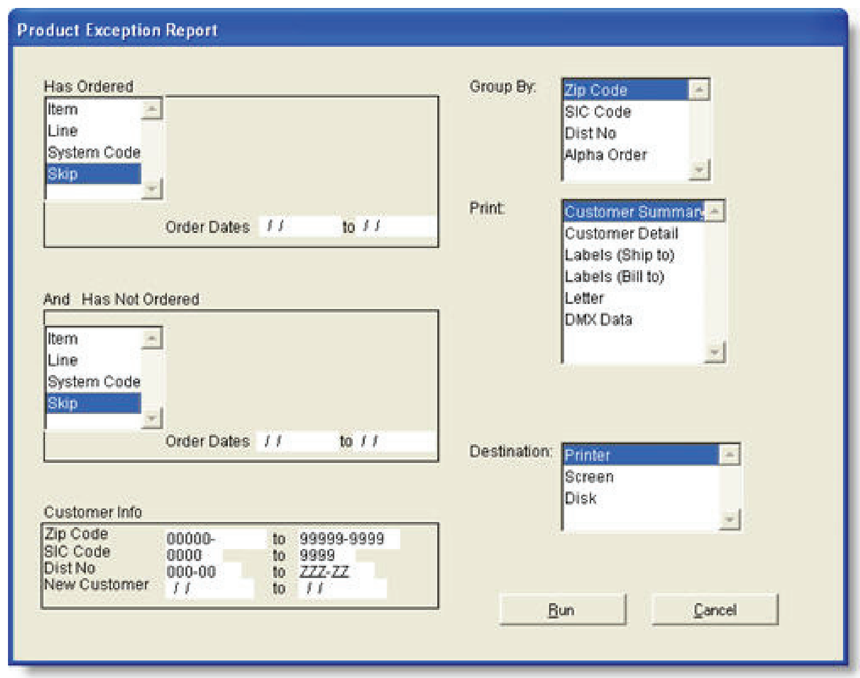
# Prod Line Sales Comparison, cont.

| Step | Action |
|---|---|
| 9 | ***Field Description:*** These fields relate to the *Line* report output – check the CMS Manual for additional field descriptions.<br><br>→ **Product Line** – reflects the product line with a description of what the two-digit code represents<br>→ **Y.T.D [includes specific date]**– reflects the previous YTD sales<br>→ **Y.T.D [includes specific date]**– reflects the current date sales by product line based on the selection in the criteria section<br>→ **% Change** – reflects the variance percentage between this year and last year<br>→ **Totals** – reflects the total forms amount |
| 10 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br><br> |
| 11 | Press the ESC key to exit completely out of reports. |

# Product Exception

**Product Exception**

The Product Exception report can list customers who have ordered X product(s0 but have not ordered Y product(s). For example, customers who have ordered checks, but not deposit tickets.

| Step | Action |
|---|---|
| 1 | Navigate to Product Exception from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Product Exception link. |
| 3 | The Product Exception Report Screen will appear:   Select the report option[s] based on the report you would like to generate. |

*Continued on next page*

# Product Exception, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

***Has Ordered –*** Use this option to locate information about what the customer HAS purchased.

***Query options:***

- **Item** – used to locate what product code[s] have been purchased by customers
- **Line** – used to locate what product line[s] have been purchased by customers
- **System Code** – used to locate what customers have purchased using the system codes
- **Skip** – used if you are will not pull information on what customers have purchased

</td></tr>
<tr><td>5</td><td>

Double-click on the Option to access the Data Selection pop-up.

This is an example of the Data Selection pop-up that appears.

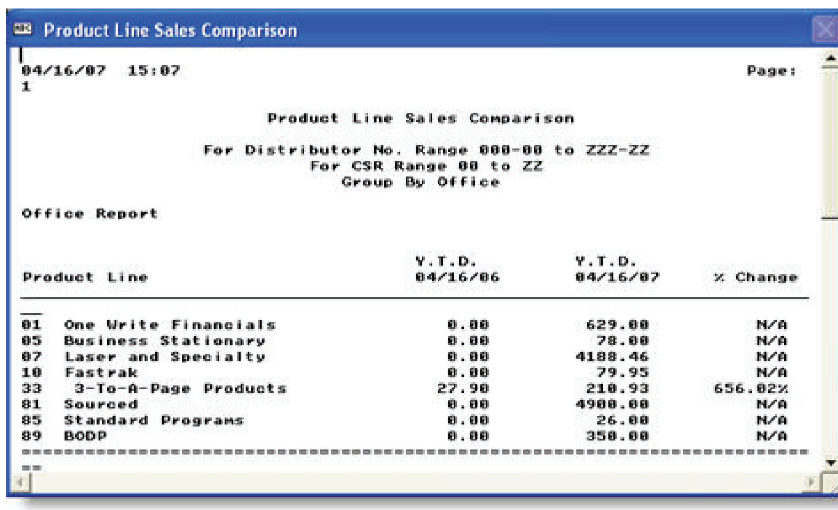

Select one, or up to five per category. You'll need to use an asterisk wild card when using just the product prefix [i.e. SFSL1, SFSL2, tc.]

- **"="** – click the radio button next to this option when only one item is desired.
- **List** - click the radio button next to this option when more than one item is desired. You can enter up to five.

</td></tr>
</table>

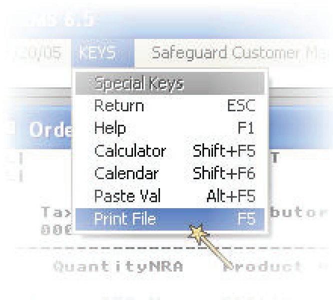
*Continued on next page*

# Product Exception, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>Group By: Allows you to specify how the report output will be grouped.<br><br>➢ Office – allows you to group the report by distributorship<br>➢ Dist # - allows you to group the report by distributor number<br>➢ Assoc # – allows you to group the report by associate number<br>➢ CSR – allows you to group the report by CSR number</td></tr>
<tr><td>7</td><td>Run Report:<br>
<br>Click the Run Report button.</td></tr>
<tr><td>8</td><td>This is a sample of the Prod Line Sales Comparison report using YTD as the desired output, grouped by Office:<br>
</td></tr>
</table>

*Continued on next page*

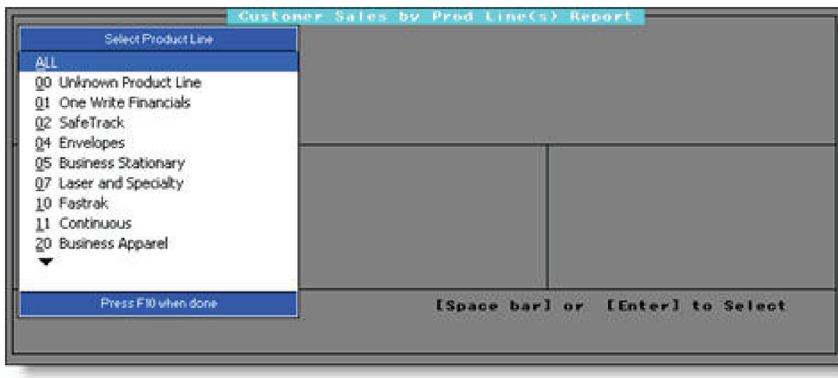
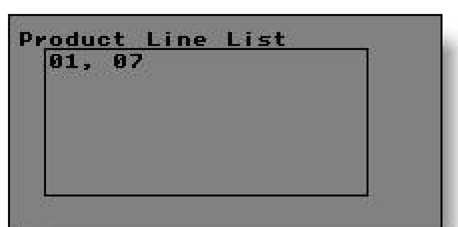
# Product Exception, cont.

| Step | Action |
|---|---|
| 9 | ***Field Description:*** These fields relate to the *Line* report output – check the CMS Manual for additional field descriptions.<br><br>→ **Product Line** – reflects the product line with a description of what the two-digit code represents<br>→ **Y.T.D [includes specific date]**– reflects the previous YTD sales<br>→ **Y.T.D [includes specific date]**– reflects the current date sales by product line based on the selection in the criteria section<br>→ **% Change** – reflects the variance percentage between this year and last year<br>→ **Totals** – reflects the total forms amount |
| 10 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br><br> |
| 11 | Press the ESC key to exit completely out of reports. |

# Cust Sales By Prod Line[s]

**Cust Sales By Prod Line[s]**

Select one, two or all of the product lines to view a report that shows customer's total sales sorted by a product line.

| Step | Action |
|---|---|
| 1 | Navigate to Cust Sales By Prod Line[s] from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Cust Sales By Prod Line[s] link. |
| 3 | The Cust Sales By Prod Line[s] Report Screen will appear:<br><br><br>Select the report option based on the report you would like to generate.<br>➢ **Product Lines** – using the mouse, click on one or all that apply. If selecting 00, that will show results for ALL. Press F10 to accept and continue.<br>The following results will appear based on the items selected:<br><br> |

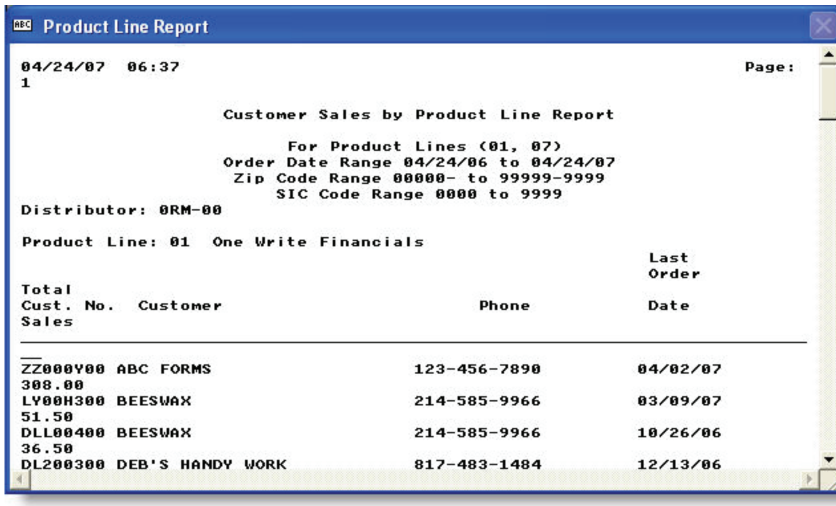
*Continued on next page*

# Cust Sales By Prod Line[s], cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Select from the following criteria:***<br><br><br>➢ **Zip Code from/to** – Enter the desired zip code range for the report.<br>➢ **SIC Code** - The Standard Industry Code entered in the customer's contact screen.<br>➢ ***Order Dates -*** Enter the Order Date range you would like to show on the report. |
| 6 | ***Run Report:***<br><br><br>Click the Run Report button. |

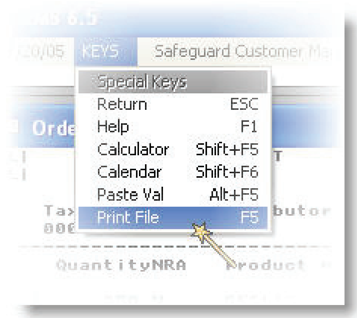
*Continued on next page*

# Cust Sales By Prod Line[s], cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>This is a sample of the Cust Sales By Prod Line[s] report using Laser and One-Write as the desired output:<br><br><br>Product Line Report<br>04/24/07 06:37 Page: 1<br>Customer Sales by Product Line Report<br>For Product Lines (01, 07)<br>Order Date Range 04/24/06 to 04/24/07<br>Zip Code Range 00000- to 99999-9999<br>SIC Code Range 0000 to 9999<br>Distributor: 0RM-00<br>Product Line: 01 One Write Financials<br>Total Cust. No. Sales | Customer | Phone | Last Order Date<br>ZZ000Y00 308.00 | ABC FORMS | 123-456-7890 | 04/02/07<br>LY00H300 51.50 | BEESWAX | 214-585-9966 | 03/09/07<br>DLL00400 36.50 | BEESWAX | 214-585-9966 | 10/26/06<br>DL200300 | DEB'S HANDY WORK | 817-483-1484 | 12/13/06</td></tr>
<tr><td>8</td><td>Field Description: check the CMS Manual for additional field descriptions.<br><br>→ Distributor – reflects the distributor number for these customers<br>→ Product Line – reflects the product line for the results. The report is grouped by product line; therefore you will need to scroll to see additional product line results.<br>→ Total Cust. No Sales– reflects the customer number and the total sales for this product line for that specific customer.<br>→ Customer – reflects the customer name<br>→ Phone – reflects the phone number on record for this customer<br>→ Last Order Date – reflects the last order date for each customer listed.<br>→ Product Line * Totals – reflects the product line sales total.<br>→ Number of Customers – reflects the total number of customers purchasing this product line.</td></tr>
</table>

*Continued on next page*

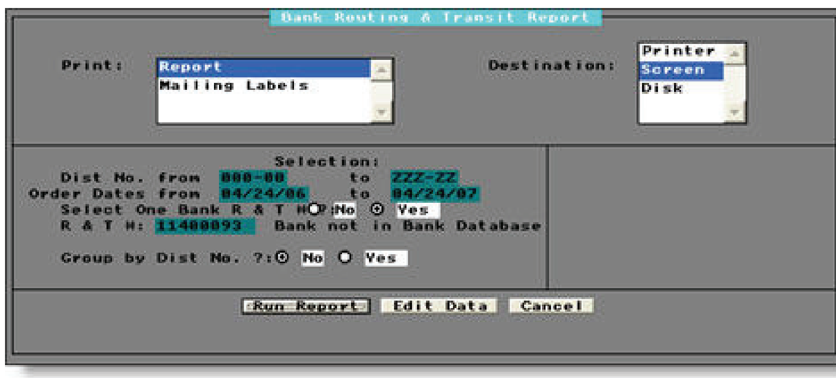
# Cust Sales By Prod Line[s], cont.

| Step | Action |
|---|---|
| 9 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br> |
| 10 | Press the ESC key to exit completely out of reports. |

# Bank R&T

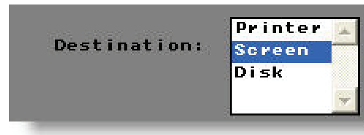
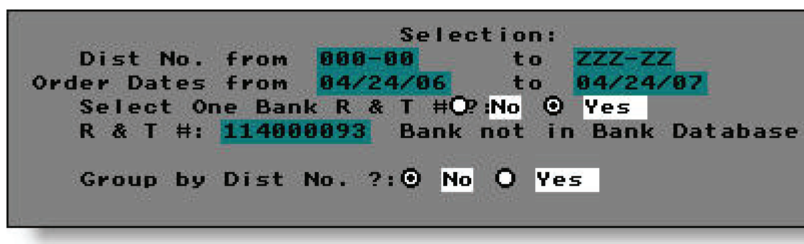
**Bank R&T**

This report is used to view customer order history based on the Design Form information when used in conjunction with the Customer Bank Database. The bank's routing and transit number is used to locate the desired results.  You can create a hardcopy report, or send the information to the printer to print labels once you've selected either the customers Bill To or Ship Too address.

| Step | Action |
|---|---|
| 1 | Navigate to Bank R&T from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Bank R&T link. |
| 3 | The Bank R&T Report Screen will appear:<br><br>Select the report option based on the report you would like to generate.<br><br>➢ **Report** – allows you to view a report of the customer information.<br>➢ **Mailing Labels** – allows you to print mailing labels by selecting either the Bill To, or Ship to address for the customers. |

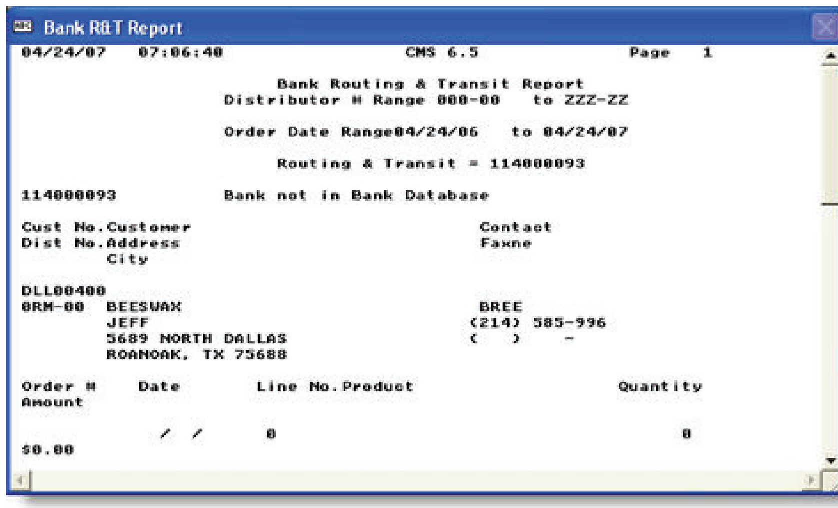
*Continued on next page*

# Bank R&T, cont.

| Step | Action |
|---|---|
| 4 | ***Destination:***<br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Select from the following criteria:*** The criteria shown in the picture below is what appears when selecting *One R&T number* as the output option. Access the CMS Manual for additional options.<br><br>➢ ***Dist No -*** Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers.<br>➢ ***Order Dates -*** Enter the Order Date range you would like to show on the report.<br>➢ ***Select One Bank R & T # -*** Default is NO, click in the YES radio button to enter an R & T number for a specific bank.<br>➢ ***R & T # -*** Enter the routing and transit number for the specific bank.<br>➢ ***Group by Dist No.*** – Default is NO, click in the YES radio button to separate the report by Distributor Number. |

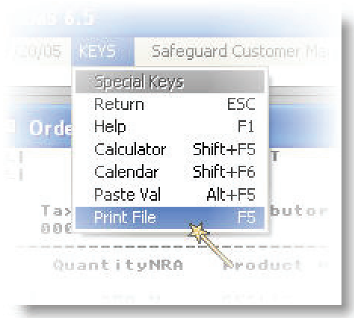
*Continued on next page*

# Bank R&T, cont.

| Step | Action |
|---|---|
| 6 | ***Run Report:***<br><br>Click the Run Report button. |
| 7 | This is a sample of the Bank R&T report using a specific *R&T number* as the desired output:<br> |
| 8 | ***Field Description:*** check the CMS Manual for additional field descriptions.<br><br>→ **Routing and Transit** - reflects the R&T number<br>→ **Customer No.** – reflects the customer number<br>→ **Distributor No.** – reflects the distributor number for these customers<br>→ **Customer Address** – reflects the customer name and address<br>→ **Contact** – reflects the contact name and phone number located on the customer record.<br>→ **Order # and Amount** – reflects the order number and sales for the order<br>→ **Date** – reflects the last order date for each customer listed. |

*Continued on next page*

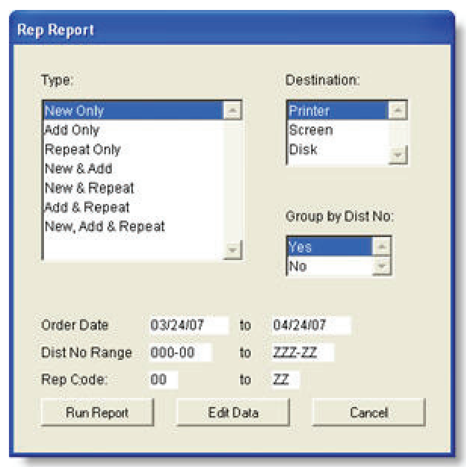
# Bank R&T, cont.

| Step | Action |
|---|---|
| 8, cont. | ***Field Description, cont:***<br><br>→ **Line No. – reflects the product line**<br>→ **Product** – reflects the product code<br>→ **Quantity** – reflects the total quantity for the order.<br>→ **Total Customers** – reflect the total number of customers for a specific R&T number. |
| 9 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br> |
| 10 | Press the ESC key to exit completely out of reports. |

# Rep Report

**Rep Report**

This report will show you a list of orders related to the Rep field on the order. The Rep Report is very useful for tracking results of sales promotions by telemarketers in the office. The report displays the number of orders and sales dollars in the specified ranges.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Navigate to Rep Report from the Reports menu in CMS by clicking on the Sub-menu title Sales.</td></tr>
<tr><td>2</td><td>Click the Rep Report link.</td></tr>
<tr><td>3</td><td>The Rep Report Screen will appear:<br>

<br>
Select the report option based on the report you would like to generate.<br><br>
➢ New Only – view only New orders<br>
➢ Add Only – view only Add orders<br>
➢ Repeat Only – view only Repeat orders<br>
➢ New & Add – view New AND Add orders<br>
➢ New & Repeat – view New AND Repeat orders<br>
➢ Add & Repeat – view Add AND Repeat orders<br>
➢ New, Add & Repeat – view ALL orders</td></tr>
</table>

*Continued on next page*

# Rep Report, cont.

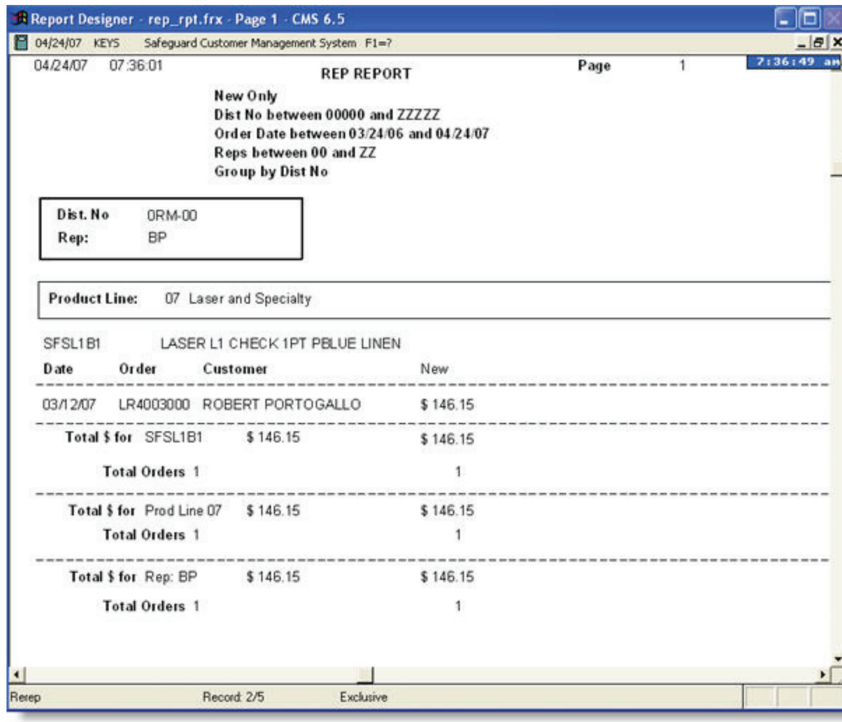
| Step | Action |
| --- | --- |
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |
| 5 | ***Group by Dist No. –*** Default is set to No, click YES if the desired grouping for the report is YES. |
| 6 | ***Selection:*** Check the CMS Manual for additional field descriptions.<br>➢ ***Order Date - -*** Enter the Order Date range you would like to show on the report.<br>➢ ***Distributor No Range --*** Enter the Distributor Number range you would like to show on the report. This includes specific Associate numbers.<br>➢ ***Rep Code -*** Enter the Rep Code range you would like to show on the report. |
| 7 | ***Run Report:***<br><br><br>Click the Run Report button. |

*Continued on next page*

# Rep Report, cont.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>

This is a sample of the Rep Report using *New Orders* as the desired output:




</td></tr>
<tr><td>9</td><td>

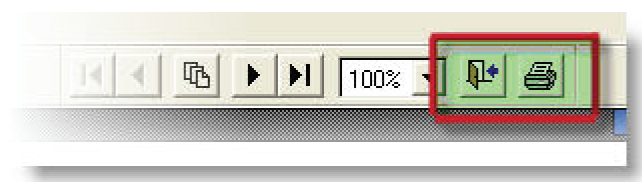
***Field Description:*** check the CMS Manual for additional field descriptions.

- **Distributor No.** – reflects the distributor number for these customers
- **Rep –** reflects the Rep Code
- **Product Line –** reflects the product line name and number, to include the product code and description
- **Date** – reflects the date of the order
- **Order** – reflects the order number for the item ordered.
- **Customer** – reflects the customer name
- **New** – reflects the sales for new orders

</td></tr>
</table>

*Continued on next page*

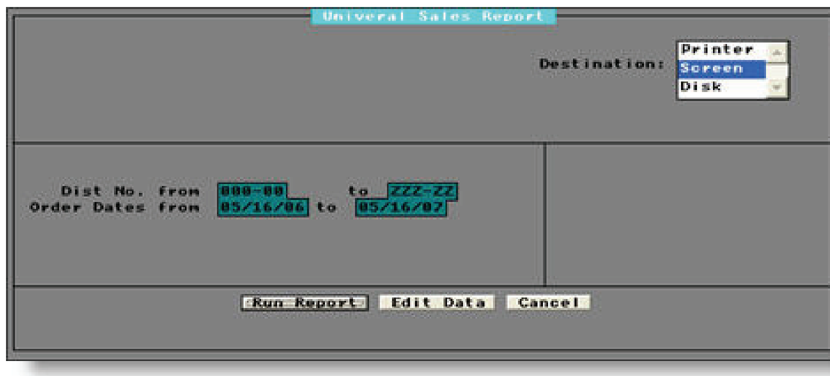
# Rep Report, cont.

| Step | Action |
|---|---|
| 9, cont. | ***Field Description, cont:***<br><br>→ **Total $ for** – reflects the total dollars associated with that specific product code<br>→ **Total $ for Product Line** - reflects the total dollars associated with that specific product line<br>→ **Total $ for Rep** - reflects the total dollars associated with that specific rep code<br>→ **Total Orders** – reflects the total order count for the report |
| 10 | To exit or print the report if destination selected was "screen", select the appropriate icon from the taskbar.<br><br>➢ **Door** - Exit<br>➢ **Printer** - Print<br><br><br><br>Click on the option to select it. |
| 11 | Press the ESC key to exit completely out of reports. |

# Universal Sales Report

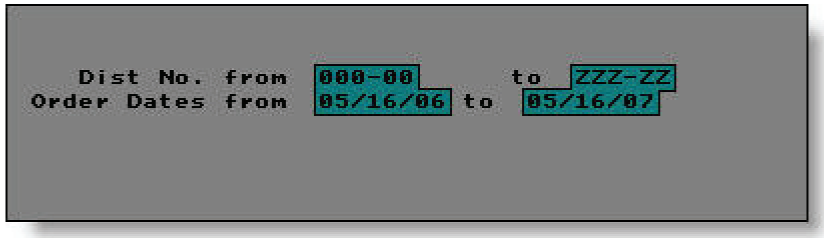
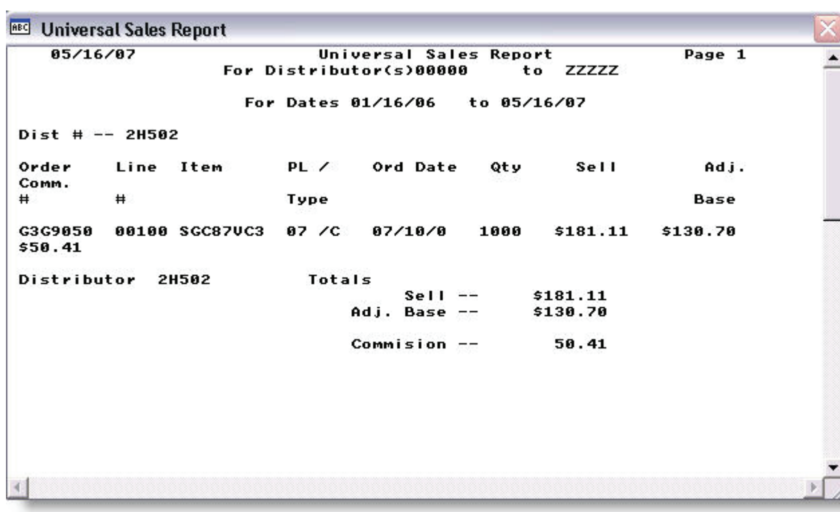
**Universal Sales Report**

The Universal Sales Report generates a list of orders that contain the U override code.

| Step | Action |
|---|---|
| 1 | Navigate to Universal Sales Report from the Reports menu in CMS by clicking on the Sub-menu title Sales. |
| 2 | Click the Universal Sales Report link. |
| 3 | The Universal Sales Report Screen will appear:<br><br> |
| 4 | ***Destination:***<br><br><br>➢ ***Printer*** - Sends the report straight to the Printer.<br>➢ ***Screen*** - Allows you to view the report on Screen.<br>➢ ***Disk*** - Allows you to create a .txt version of the report.<br>—— You can then use an application like Microsoft® Excel to manipulate the data and create a mail merge for labels.<br>—— A Select File Name pop-up box will appear.<br>—— Type the name and press Enter. |

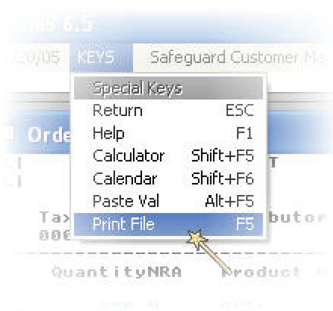
*Continued on next page*

# Universal Sales Report, cont.

| Step | Action |
|---|---|
| 5 | ***Select from the following criteria:***<br><br><br>➢ **Dist No. from/to** – Enter the desired Distributor number range for the report.<br>➢ **Order Dates from/to** – Enter a date range to locate sales totals for orders within that range. |
| 6 | ***Run Report:***<br><br><br>Click the Run Report button. |
| 7 | This is a sample of the Universal Sales Report:<br><br> |

*Continued on next page*

# Universal Sales Report, cont.

| Step | Action |
|---|---|
| 8 | ***Field Description:*** check the CMS Manual for additional field descriptions.<br><br>→ **Order #** - reflects the order number.<br>→ **Line #** - reflects the line number the product is on in the order.<br>→ **Item** – reflects the product code.<br>→ **PL Type** – reflects the product line type.<br>→ **Order Date** - reflects the date the order was entered.<br>→ **Qty** - reflects the quantity ordered.<br>→ **Sell** - reflects the sell price.<br>→ **Adj. Base** - reflects the adjusted base price.<br>→ **Comm.** - reflects the commission amount. |
| 9 | To exit or print the report if destination selected was "screen", select the appropriate option from the keys menu.<br><br>Click on the option to select it.<br><br> |
| 10 | Press the ESC key to exit completely out of reports. |