# SALES HISTORY

Sometimes you just need to see the big picture.    You don't need to see the detail of individual orders or invoices or items.   You just want to see what the company as a whole has sold or how much a particular customer has bought.    The Sales History module was designed for this purpose.

You can access the data 3 ways:

- Display - You can display data for the company, a single salesman, a single customer, etc.         You can also display customer analysis data.

- Print - You can print data on multiple customers, etc.

- Export - You can export most forms of sales history data to Excel.

Data is available for the following:

- Company overall
- Salesman
- Master salesman
- Customer
- Salesman/customer
- Customer types
- Sales report categories
- Items—including by inventory type or vendor
- Item report categories
- Program

If your salesmen are set up with restrictions on what customers they can see, then the sales reports will have the same restrictions.

The following features are new for Version 12.


## Sales Targets

You can now set up sales targets for the following levels:

- Company
- Customer
- Salesman
- Salesman/Customer
- Program

When you print these sales reports, you will have the option of including the target numbers.


Several new functions have been added to help you load the sales target data.


### *Update sales targets*

You can load it directly by entering data for the company, customer, etc.

Pick the file, the year and the type of data.   If you are entering data for customers, you will be prompted for the customer number you want to load.    You will also be prompted for the salesman or program number when loading those types of data.
You can enter as much or as little data as you like.    For example, you can load sales but not profit or count numbers.    You can load an annual target in January or spread it out over the year.    If your sales are seasonal, you may just prefer to enter a single number for the year.   If your sales are spread out rather evenly over the year, you may prefer to split your sales accordingly.

If you want to load a single number and then have it spread equally through out the year, then enter your January numbers then click on the "Split January values evenly among 12 months" link to have the values spread through the year.

You can use the "Delete" button to delete sales loaded for an entity.

## Generate Target S/S from Existing data

If you already have existing data in Lakeshore and want to base your new targets on the previous year's activity, you can create your target data by copying last year's data to a spreadsheet to use as a starting point in your target calculations.

You can program in an increase or decrease in your targets by entering an appropriate percentage. For example, if you want to set a goal of sales at 5% more than the previous year, you would enter 5% increase.

The data will be exported to an Excel file that will be displayed on your screen. You may make whatever adjustments you wish and then import that data back into Lakeshore. The import function is a separate function described below.

## Load Sales Targets from spreadsheet file

You can work out your sales targets using a spreadsheet program like Excel. You can either start from scratch, export the data from Lakeshore using the function described above, or create the file from some other source.

When you are ready to load the data into Lakeshore, you can use this Load function.

The file can be in Excel format or you can use a tab-delimited file.

You can load targets for individual months, just a total for the year , or enter a total that will be spread among the 12 months.

You can load salesman, customer and company data all at once. The data for each salesman/customer number combination will be rolled up to the customer level and to the company data. If you are not loading targets for all customers, you may want to do the company data separately.

Check the Help file for the screen for additional instructions on how to specify the columns, etc.

## Generate Target S/S from existing data

| | |
|---|---|
| **Type of data:** | ⊙ Orders ○ Invoices |
| **Year used as basis (CCYY):** | 2012 |
| **Type data:** | ⊙ Company |
| | ○ Salesman |
| | ○ Customer |
| | ○ Salesman/Customer |
| | ○ Program |

| | | |
|---|---|---|
| **% increase/decrease** | 5 | **Blank if no increase; negative for decrease** |
| **Type selection:** | ○ Annual  ⊙ Individual months | |

( Excel )          ( Reset )          ( Exit )

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## Load Sales Targets from File

| | |
|---|---|
| **File Name** (full path) | /laketrans/tmp/mybudget.xls |
| **Type File** | ⊙ Excel  ○ Tab-delimited |
| **Number of heading lines** | 1 |
| **Type of data:** | ⊙ Orders ○ Invoices |
| **Year being loaded (CCYY):** | 2012 |
| **Type data to load:** | ☑ Company |
| | ☐ Salesman |
| | ☐ Customer |
| | ☐ Salesman/Customer |
| | ☐ Program |

**Are you only loading annual targets?**       ☐

**If you are loading annual targets, put it into the January row.**

| Month | Column for Sales | Column for Profit | Column for Count | |
|---|---|---|---|---|
| January | A | | | **Enter column as A, B, C....AA, AB, etc.** |
| February | B | | | |
| March | C | | | |
| April | D | | | |
| May | E | | | |

( Submit )          ( Reset )          ( Exit )

## Sales Charts

The second new feature is the addition of bar charts.    We are utilizing Google's free charting routines.

When you request a display of sales data, you will have an additional box you can check to display the sales chart. It does take a bit longer to display the chart, so you may not want to show the charts every time you look at sales.

Here is an example showing the chart and the sales targets.
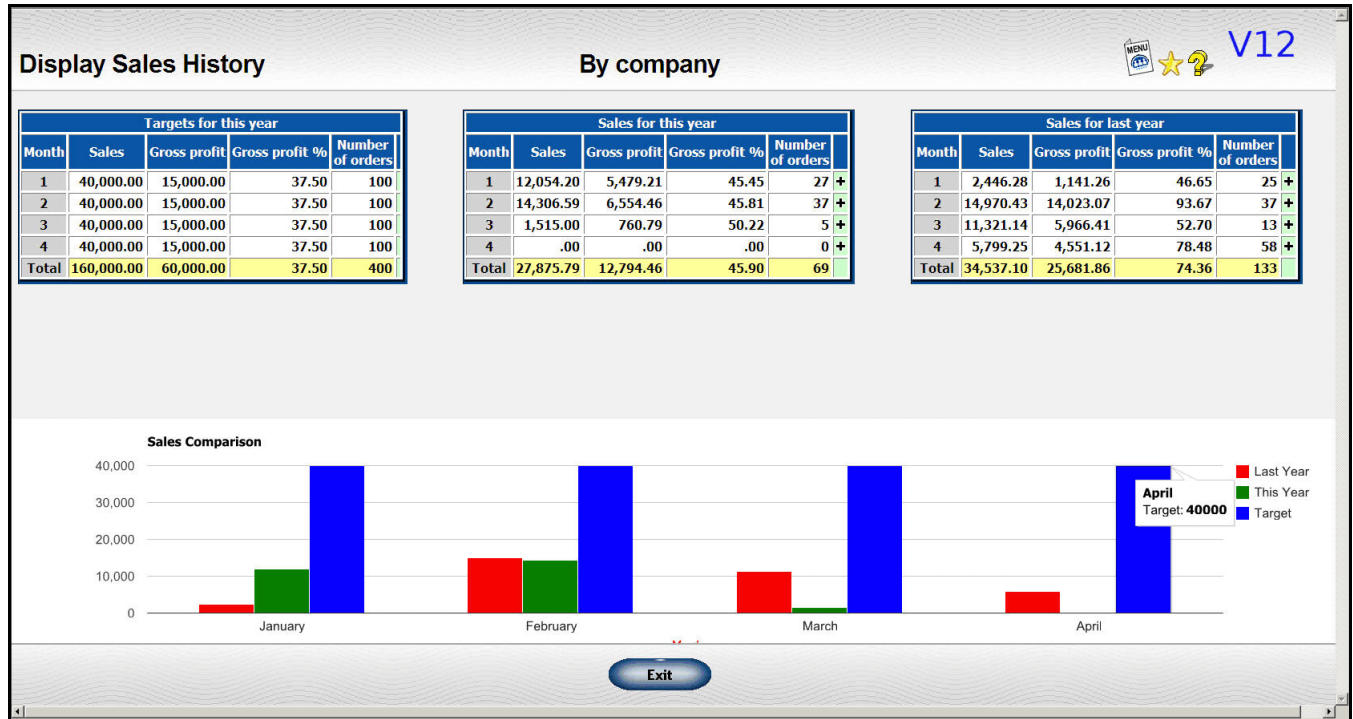


You can also display just the chart in a larger format without the sales information tables.
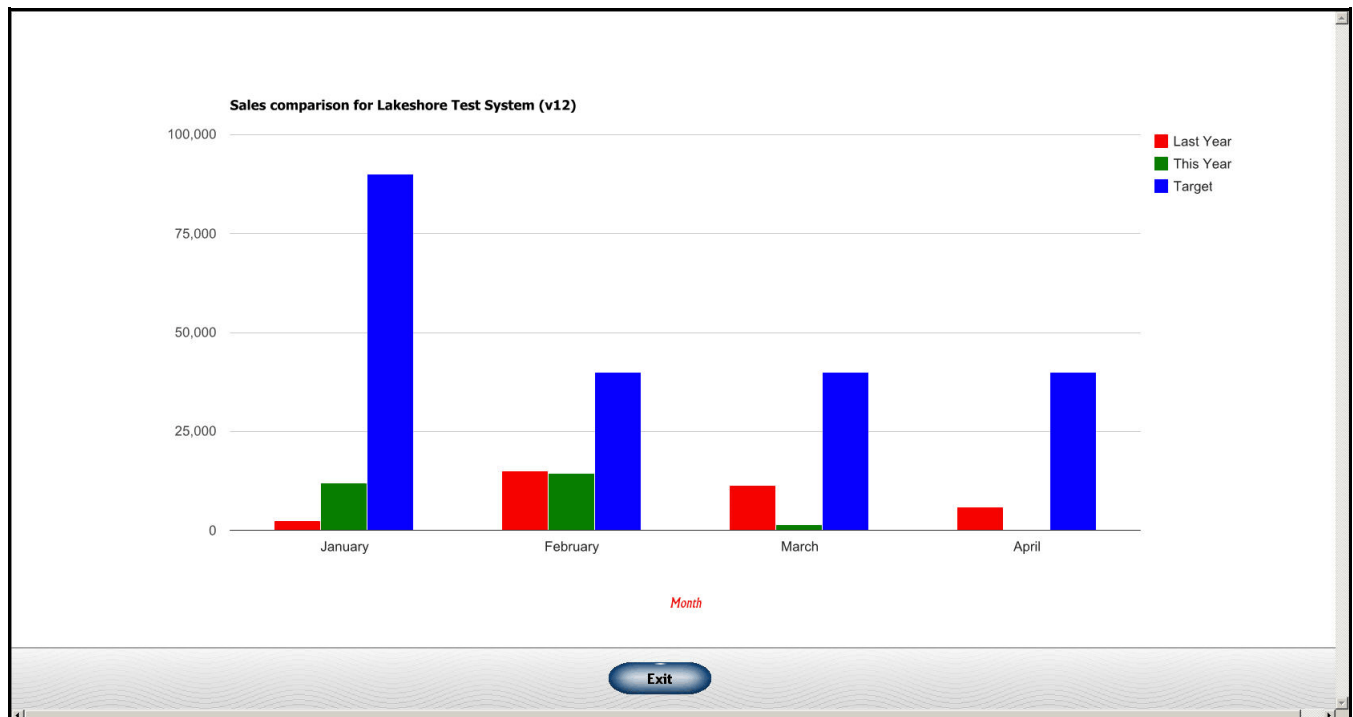
## *Export options*

For several of the more commonly used reports, you can also export the sales data to Excel or another spreadsheet program.

You can do the export for the following:

- Master Salesman
- Master Salesman/Customer
- Master Salesman/Contact
- Salesman
- Salesman/Customer
- Salesman/Contact
- Customer
- Customer Analysis
- Customer - 5-year sales figures
- Contact
- Contact Analysis
- Program
- Program/Customer
- Program/Contact

## Other Reporting options

There are many other reports in Lakeshore that can also be used for reporting, even at a summary level, for customer programs.

- Order Inventory Activity/Invoice Inventory Activity
- Order Item Detail/Invoice Item Detail
- Item Ranking (Customer invoice reports menu)