MYOB EXO BUSINESS WHITE PAPER

Sales Analysis Matrix

EXO
BUSINESS

MYOB ENTERPRISE SOLUTIONS

Contents

Overview

The MYOB EXO Business Sales Analysis Matrix module is a powerful sales analysis tool that allows you to quickly create over 700 combinations of sales reports on the fly, with no technical report-writing skills required.

The Sales Analysis Matrix uses a combination of preset report formats, common groupings and custom filters to let you quickly and accurately analyse your sales. Sales staff can define their own requirements by experimentation, and then share the results with colleagues by email, the web or spreadsheet.

The selection criteria you create are saved as report definitions, so you or your business partner can copy and refine them later. You can also run these search criteria from the Clarity command line, allowing you to schedule the reports you create to run at preset times, such as overnight.

When you've created your favourite sales analysis reports, save them, then add them to your menu using the Menu Designer so you can re-run them any time without having to re-configure them.

Building a Sales Analysis Matrix Report

To open the Sales Analysis Matrix, log in to EXO Business, go to the Reports menu and choose **Sales Reports > Sales Analysis Designer**. The Sales Analysis window appears:
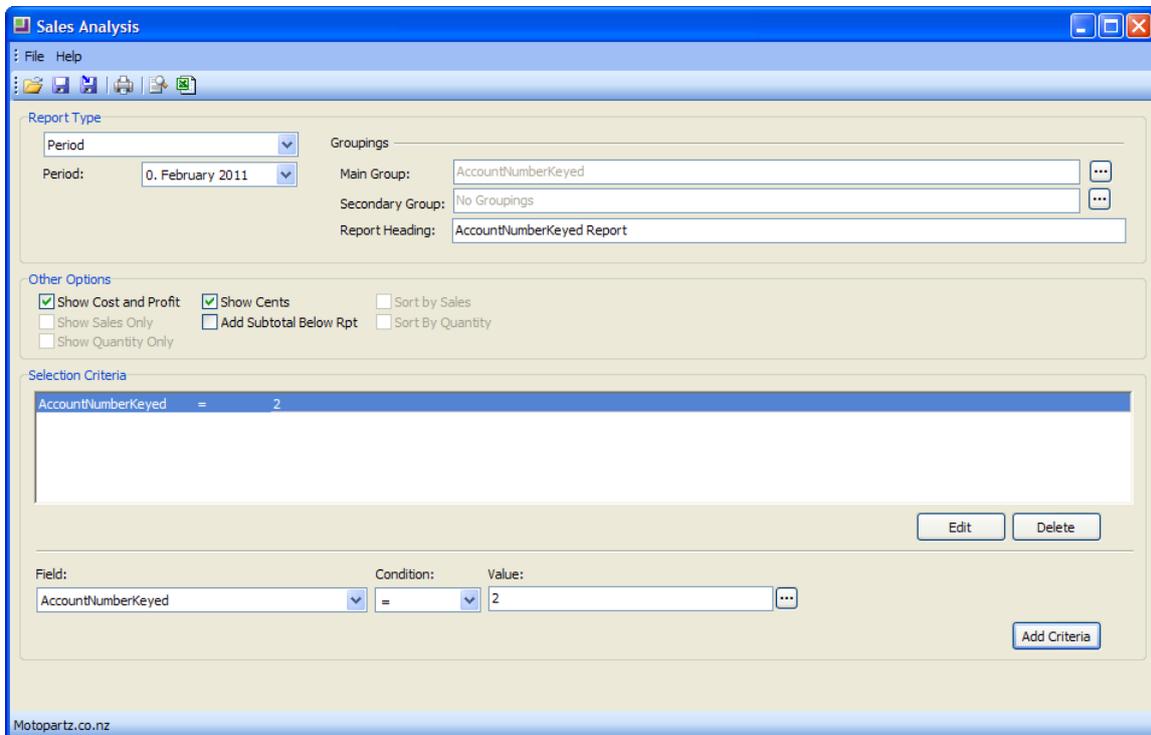
Report Types

There are a number of Clarity reports which form the basis of the Sales Analysis Reports. These CLR reports, along with jpg thumbnail images and PDF samples, are stored in the Clarity masters folder.

The reports are:

- SalesAnalysis5Weeks.clr
- SalesAnalysisDateRange.clr
- SalesAnalysisDateRangeCustom1.clr
- SalesAnalysisDateRangeCustom2.clr
- SalesAnalysisDateRangeNoGP.clr
- SalesAnalysisDateRangeNoGPCustom1.clr
- SalesAnalysisDateRangeNoGPCustom2.clr
- SalesAnalysisDiscount.clr
- SalesAnalysisGP.clr
- SalesAnalysisGroupPercentages.clr
- SalesAnalysisMonthly.clr
- SalesAnalysisMonthlyPortrait.clr
- SalesAnalysisNoGP.clr

Sales Analysis Matrix Report Types

Period

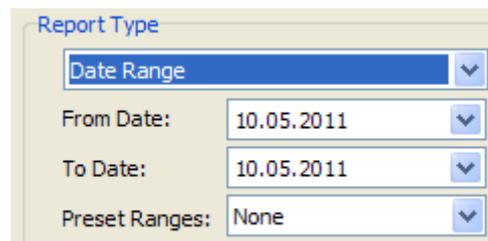The periods here are your GL periods, as set up in EXO Business Config, in Essential > Business Essentials > Financial Year.
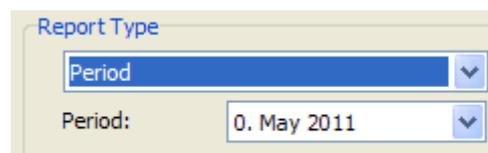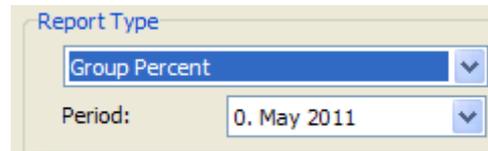

Date Range

In addition to being able to specify your own date range, you can also choose one of the preset date ranges.

Group Percent

The Group Percent reports give This Year, Last Year, Year to date, last year to date and variance percentages for the selected groupings and criteria.

Discounts

The Discounts reports give discount percentage, dollar value and average dollar value, for the selected report grouping and selection criteria.
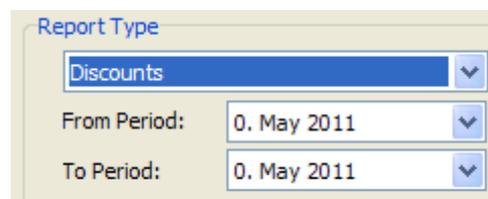
12 Month Quantity

The 12 month Quantity reports give monthly quantity sold totals for the 12 months before the selected Period date. Due to the number of columns in this report, you also have the option of printing the report in landscape or portrait format.
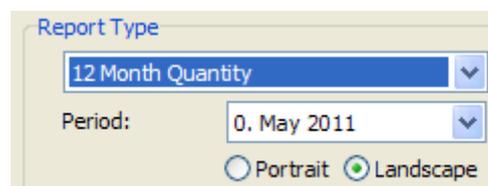
12 Month Sales

The 12 month Sales reports give monthly sales totals for the 12 months before the selected Period date. Due to the number of columns in this report, you also have the option of printing the report in landscape or portrait format.
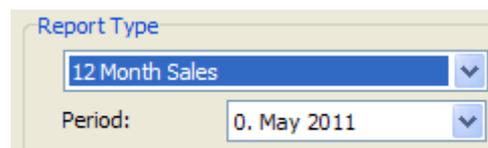
5 Weeks Qty

The 5 Weeks Qty report gives weekly quantity sold totals for the 5 weeks before the selected Period date. You can specify a start date for the report, or select one of the preset range dates as your

starting date. For example, choosing 'Last Month' as the Preset Range will report on the 5 weeks immediately following the 1st of the last month.
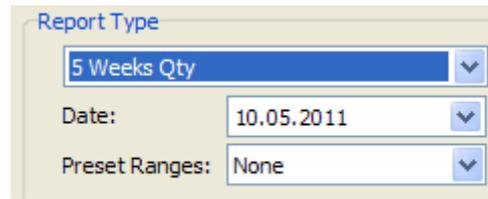
5 Weeks Sales

The 5 Weeks Sales report gives weekly sales totals for the 5 weeks before the selected Period date. You can specify a start date for the report, or select one of the preset range dates as your starting date. For example, choosing 'Last Month' as the Preset Range will report on the 5 weeks immediately following the 1st of the last month.
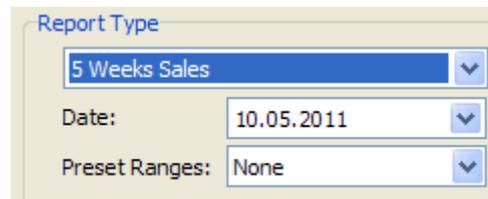
Report Options

Once you have chosen the type of report you want to run, you can filter the report by **Main Group** and then **Secondary Group**. For example, reporting on Location and then Sales Rep will group sales by location and for each location by sales rep. Reporting on Primary Group and then Location will give sales of the given stock group for each location, and so on.

A lookup window is used for selecting groupings. Clicking the edit button at the end of each grouping field opens a window where all available groupings are displayed:
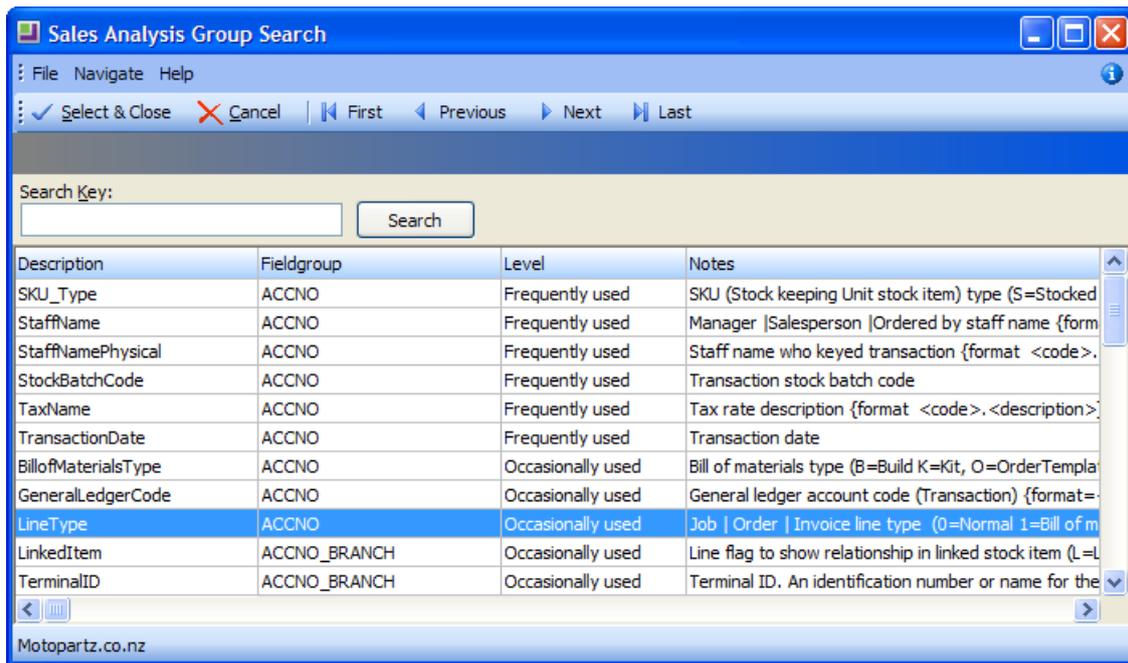
> **Note:** The information on each group that is displayed on this window is stored in the FACT_GLOSSARY table.

You can also choose to report on the Main Group and not use the Secondary Group by selecting the "No Groupings" option for the **Secondary Group** field.

The Other Options that are available for the report and relevant to are determined by the Report Type you have chosen for the report. Also, as you select options here, other options may become available or unavailable as appropriate. For example, for a date range report, selecting **Show Cost & Profit** logically makes **Show Sales Only** and **Show Quantity Only** options unavailable.

Report Selection Criteria Filters

The Report Selection Criteria Filter gives you an even greater level of analysis in your SAM reports. These criteria mimic common SQL statements, but let you build your filter from simple drop-down menus.

Using Selection Criteria, you can report on a single Debtor account, Stock Group, Debtor Account Group, sales person, location or branch. Clicking the ⋯ button next to the **Value** property opens a search window offering all relevant values for the selected field.

You can use the following conditions to indicate the relationship between the field and the value:

Selection Criteria	Description
=	Selects all records that are equal to the value you specify.
<>	Selects all records that are not equal to the value you specify.
<	Selects all records that are less than the value you specify.
<=	Selects all records that are less than or equal to the value you specify.
>	Selects all records that are greater than the value you specify.

=	Selects all records that are greater than or equal to the value you specify.
Like Not Like	Selects all records that are like the value you enter, for example, **Debtor Acc Like Jo** would return a list including account names like Johnson, Jones, and so on.
Between Not Between	Selecting either of these criteria enables both value fields, allowing you to select all records that are inside (Between) or outside (Not Between) the specified To and From values.
In List Not In List	Selects multiple records that match (In List) or don't match (Not In List) a comma-separated list of values, e.g. **Debtor Account In list 1,2,3** returns only Debtor account numbers 1, 2 and 3.
Blank Not Blank	Selects all records where the selected field is are either blank or not blank.

Note: The conditions are generic conditions and may not apply to all reports in the Sales Analysis Designer.

Saving Sales Analysis Matrix Reports

You can save Sales Analysis Matrix reports for re-use later. When you save a Sales Analysis Matrix report, it is saved with a .SAM file extension.

As with any Clarity report, using the Clarity Report Designer you can customise these Clarity reports and save them to your Custom folder, as specified by the **Directory location for custom Clarity forms (.CLR, .CLF and .FMT)** Computer-level profile setting.

The .SAM file only stores the parameters you specify in the Sales Analysis Matrix window; if you customise the base Clarity form of a .SAM report you have created, your .SAM report will include those customisations.

A Sales Analysis Report is transferable in the same way as a clarity report file. A .SAM file can be accessed by multiple users from a server, or emailed to a branch.

Adding Sales Analysis Matrix Reports to a Menu

You can use the EXO Business Config menu designer to add your SAM reports to a menu.

In EXO Business Config, click on Staff and then on the Dropdown Menu. Open your Dropdown menu from list on the right. Drag the **Run Sales Analysis Report** procedure onto the required menu.
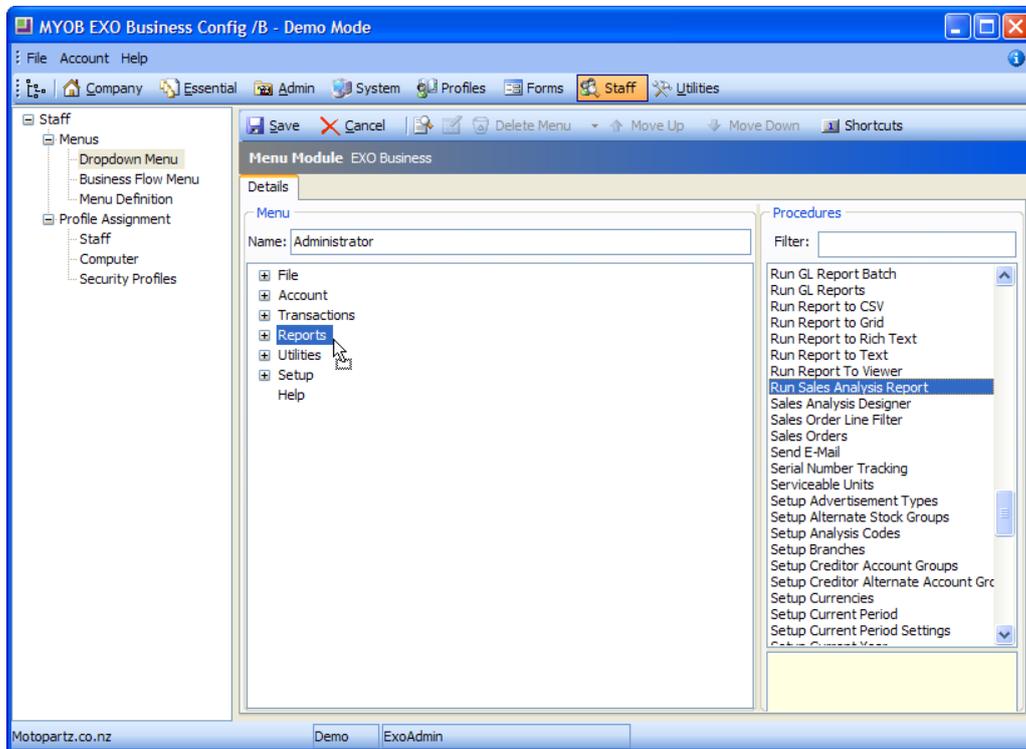
The Menu Item window appears:
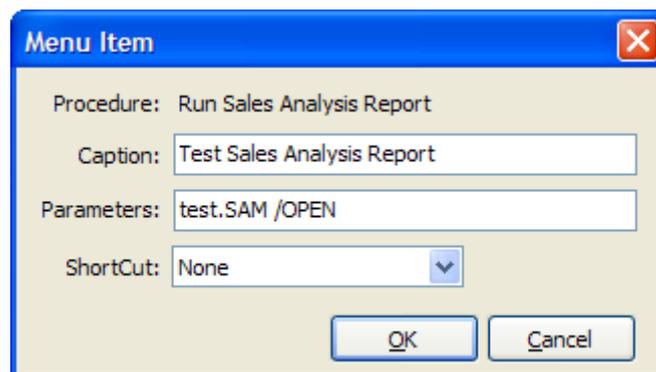
Enter the name of your report in the Caption field, and the filename of the report in the Parameters field. If you want to open the Sales Analysis Designer window each time you run the report from the menu, append '/OPEN' to the report filename, as shown in the example above.

Scheduling Reports

You can set up Windows to schedule a report to be run at a specified time in the future, in the same way you can schedule a Clarity report to be run. Create a Scheduled Task in Windows to run the report at the desired time.

In Windows XP, tasks are scheduled at Control Panel > Scheduled Tasks; in Windows 7, tasks are scheduled at Control Panel > Administrative Tools > Task Scheduler. Consult the Windows Help and Support information for guidance on setting up Scheduled Tasks.

When setting up the Scheduled Task, you will be able to specify the parameters for creating your report. You can print the report in a variety of ways including to a printer or to a PDF.

- To print to PDF, use the following parameter string format: Clarity.exe connectionname userid password MyReport.sam /d=File /f=c:\locationofpdffile\test.pdf /m=PDFFile

In the above example, the server name, login and password immediately follow the Clarity executable, the name of your Sales Analysis Matrix report, and then the location and filename of your report.

- To print directly to a printer, use the following parameter string format: Clarity.exe connectionname userid password MyReport.sam /d=Printer /P=Default /c=2

In this second example, the server name, login and password immediately follow the Clarity executable, and then the name of your Sales Analysis Matrix report.

We recommend you refer to the Clarity Reporting Advanced training manual, available from the MYOB EXO Business partner website, for detailed information about these command line report parameters.

Report Examples

PDFs of all base Clarity reports used by the Sales Analysis Matrix can be found in the Clarity folder in your EXO Business folder.

Sales Analysis Stock Item by Sales Person

The following report was generated with these settings:

- Report Type – Date Range
- Main Group –StaffName
- Secondary Group – SKU_Name
- Preset Ranges – This Year

Sales Analysis   Stock Item by Sales Person Report
Range: 01.01.2011 to 10.05.2011

Code	Description	Qty	Sales	Cost	GP$	GP%
No Manager						
ALARM01	REMOTE CAR START SECURITY	2	168.68	145.12	23.56	14.0 %
ANTROL01	ANTIROLL BARS	1	308.40	231.32	77.08	25.0 %
		3	477.08	376.44	100.64	21.1 %
1. BRIDGET FAIRWEATHER						
AIRFIL01	OVALCHROME AIR FILTER	6	403.24	299.93	103.31	25.6 %
AIRFIL05	PRO-STLYE AIR FILTER	2	58.42	37.08	21.34	36.5 %
AIRPRE01	AIR PRESSURE GAUGE	1	5.19	4.55	0.64	12.3 %
AIRSUS01	AIR SUSPENSION	1	248.10	184.55	63.55	25.6 %
ALARM01	REMOTE CAR START SECURITY	3	295.18	217.68	77.50	26.3 %
ALARM05	SECURITY ALARM	2	156.03	116.00	40.03	25.7 %
ALLOY10114X6	ALLOY WHEELS STYLE 101 14X6.0	5	1,922.50	1,502.46	420.04	21.8 %
BAT127HD	CHAMPION SILVER BATTERY - 127HD	1	68.85	45.32	23.53	34.2 %
BATCHA01	BATTERY CHARGER	1	88.00	55.24	32.76	37.2 %
CAMADJ01	ADJUSTABLE CAM SHAFT	1	215.97	158.37	57.60	26.7 %
DEF BOM OUTPUT	DEFAULT BOM OUTPUT ITEM	1	0.00	0.00	0.00	0.0 %
DVDVCDCDPLR01	ALPINE DVA-5205 DVD/VCD/CD PLAYER	2	3,178.44	2,648.69	529.75	16.7 %
EXHSTFLOMSTR01	FLOW MASTER 80 SERIES CROSSFLOW PERFORM	4	1,066.00	866.77	199.23	18.7 %
EXHSTMANFLD01	BUSCHUR RACING EXHUAST MANIFOLD	3	2,280.00	1,947.62	332.38	14.6 %
	FREIGHT	1	10.00	0.00	10.00	100.0 %
MOTOIL01	MOTOR OIL	1	4.45	2.91	1.54	34.6 %
MSTRCYLNDR	AFCO ALUMINIUM MASTER CYLINDER	5	843.75	663.50	180.25	21.4 %
MUFFLE01	MUFFLER	5	549.22	366.25	182.97	33.3 %
NGKSPKCABL01	SPARK PLUG CABLES	5	217.81	163.30	54.51	25.0 %
NGKSPRK4PK	NGK EXTENDED REACH SPARK PLUGS - 4 PACK	1	53.17	35.44	17.73	33.3 %
PWRSTRNG01	POWER STEERING PUMP	5	3,316.72	2,267.23	1,049.49	31.6 %
RACK&PINION01	RACK AND PINION INSTALLATION KIT	5	3,750.00	2,914.60	835.40	22.3 %
SEACOV01	SEAT COVER VINYL - KNIT BACK	10	810.68	480.00	330.68	40.8 %
SEACOV05	SEAT COVER SHEEPSKIN	10	462.54	220.00	242.54	52.4 %
SEACOV10	STANDARD SEAT COVER	10	286.58	150.00	136.58	47.7 %

Motopartz.co.nz
SalesAnalysisDateRange.CLR

Page 1 of 4
10.05.2011 2:03:02 PM

Sales Analysis Debtor by Stock Group

The following report was generated with these settings:

- Report Type – Group Percent
- Main Group – PLU_PrimaryStockGroupName
- Secondary Group – AccountNameKeyed
- Period – July 2010

Sales Analysis Debtor by Stock Group Report
Group Percent for Period July 2010

	TY	%	LY	Var%	TYTD	%	LYTD	Var%
-1.No Stock Group								
CASH SALES	0.00	0.0 %	0.00	0.0 %	0.00	0.0 %	0.00	0.0 %
Total	0.00		0.00	0.0 %	0.00		0.00	0.0 %
1.ENGINE								
CASH SALES	201.40	11.8 %	0.00	0.0 %	455.39	13.4 %	0.00	0.0 %
NIGEL EMERSON	0.00	0.0 %	0.00	0.0 %	280.00	8.2 %	0.00	0.0 %
ALL CAR PARTS	146.05	8.6 %	0.00	0.0 %	292.10	8.6 %	0.00	0.0 %
THE CAR JUNCTION	0.00	0.0 %	0.00	0.0 %	58.34	1.7 %	0.00	0.0 %
D & C PANELBEATERS	0.00	0.0 %	0.00	0.0 %	315.48	9.3 %	0.00	0.0 %
SYMONDS ST CENTRAL SERVICE	0.00	0.0 %	0.00	0.0 %	632.90	18.6 %	0.00	0.0 %
MARKET PARTS	1,360.00	79.7 %	0.00	0.0 %	1,360.00	40.1 %	0.00	0.0 %
Total	1,707.45		0.00	0.0 %	3,394.21		0.00	0.0 %
10.OIL & LUBE								
CASH SALES	8.90	10.4 %	0.00	0.0 %	33.30	3.9 %	0.00	0.0 %
KNIGHT NICOL AUTOS	0.00	0.0 %	0.00	0.0 %	81.75	9.7 %	0.00	0.0 %
PAUL HOLLAND MOTORS	0.00	0.0 %	0.00	0.0 %	44.50	5.3 %	0.00	0.0 %
AUSSIE SPARES	76.88	89.6 %	0.00	0.0 %	76.88	9.1 %	0.00	0.0 %
THE CAR JUNCTION	0.00	0.0 %	0.00	0.0 %	89.72	10.6 %	0.00	0.0 %
D & C PANELBEATERS	0.00	0.0 %	0.00	0.0 %	299.40	35.4 %	0.00	0.0 %
SYMONDS ST CENTRAL SERVICE	0.00	0.0 %	0.00	0.0 %	219.50	26.0 %	0.00	0.0 %
Total	85.78		0.00	0.0 %	845.05		0.00	0.0 %
11.BRAKES								
KNIGHT NICOL AUTOS	1,111.00	100.0 %	0.00	0.0 %	1,111.00	41.7 %	0.00	0.0 %
AUSSIE SPARES	0.00	0.0 %	0.00	0.0 %	1,554.75	58.3 %	0.00	0.0 %
Total	1,111.00		0.00	0.0 %	2,665.75		0.00	0.0 %
12.FUEL SYSTEM								
COMFORT AUTOMOTIVE	0.00	0.0 %	0.00	0.0 %	489.25	100.0 %	0.00	0.0 %
Total	0.00		0.00	0.0 %	489.25		0.00	0.0 %
13.HEATING & COOLING SYSTEM								
KNIGHT NICOL AUTOS	0.00	0.0 %	0.00	0.0 %	1,215.97	100.0 %	0.00	0.0 %
Total	0.00		0.00	0.0 %	1,215.97		0.00	0.0 %

Motopartz.co.nz
SalesAnalysisGroupPercentages.CLR

Page 1 of 4
10.05.2011 2:16:38 PM

Sales Analysis Stock Items by Stock Group

The following report was generated with these settings:

- Report Type – 12 Month Quantity

- Main Group – PLU_PrimaryStockGroupName

- Secondary Group – SKU_Name

Sales Analysis Stock Items by Stock Group Report
Quantity Sales from Period July 2010

Code	Description							Jan10	Feb10	Mar10	Apr10	May10	Jun10	Jul10	Total
-1.No Stock Group															
DEF BOM OUTPUT	DEFAULT BOM OUTPUT ITEM	0	0	0	0	0	0	0	0	0	0	1	1	2
		0	0	0	0	0	0	0	0	0	0	1	1	2
1.ENGINE														
AIRFIL01	OVALCHROME AIR FILTER	0	0	0	0	0	0	1	8	5	1	2	2	19
AIRFIL012PK	OVALCHROME AIR FILTER	0	0	0	0	0	0	0	0	0	2	0	0	2
AIRFIL05	PRO-STLYE AIR FILTER	0	0	0	0	0	0	4	15	12	1	5	5	42
CAMADJ01	ADJUSTABLE CAM SHAFT	0	0	0	0	0	0	0	6	0	0	0	0	6
CYLNDRHD01	CAST IRON CYLINDER HEAD	0	0	0	0	0	0	0	0	0	0	0	1	1
OILFILCD29A4	OIL FILTER - PETROL - CD29A4	0	0	0	0	0	0	0	1	0	0	1	2	4
THERMO01	THERMOSTAT	0	0	0	0	0	0	0	5	6	0	0	0	11
		0	0	0	0	0	0	5	35	23	4	8	10	85
10.OIL & LUBE														
ANTSEI01	ANTISEIZE LUBRICATOR	0	0	0	0	0	0	0	23	10	1	0	0	34
DISBRA01	DISC BRAKE LUBRICATION	0	0	0	0	0	0	0	15	0	0	0	10	25
ENGTRE01	ENGINE TREATMENT LUBRICATION	0	0	0	0	0	0	0	15	19	0	0	0	34
MOTOIL01	MOTOR OIL	0	0	0	0	0	0	1	1	25	0	1	2	30
		0	0	0	0	0	0	1	54	54	1	1	12	123
11.BRAKES														
BRKCALPR	DISK BRAKE FRONT LFT & RGT CALIPER SET	0	0	0	0	0	0	0	0	0	5	0	5	10
BRPAD4SET	BRAKE PADS SET - REAR - REPLACEMENT S	0	0	0	0	0	0	0	0	0	5	0	0	5
		0	0	0	0	0	0	0	0	0	10	0	5	15