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## INTRODUCTION

CounterPoint is a complete retail management solution that gives you power and control over every aspect of your business—point of sale, inventory, customer loyalty, purchasing, management reporting, and much more.

CounterPoint includes an extensive library of built-in reports.

Each report is designed to give you all the information you need to run your business efficiently and profitably.

All CounterPoint reports are designed using the industry-leading Crystal Reports® engine. You can customize or add information to any CounterPoint report—without having to create a new report from scratch. Report customization requires the Crystal Reports Designer, purchased separately.

## KEY REPORTS

This report guide includes an overview of CounterPoint’s key reports as well as Dashboard.

Key reports provide in-depth analysis and “big picture” overviews of your business. They provide the information you need to stay on top of sales trends and inventory.

Dashboard is a powerful reporting tool that provides graphical snapshots of your entire business operation, thresholds, and key performance indicators.

## COUNTERPOINT REPORTS

### POINT OF SALE REPORTS

- Closed Gift Certificates
- Closed Layaway Journal
- Closed Store Credits
- Drawer Reading
- Drawer Summary
- Gift Certificate List
- Holds
- Layaway Activity
- Layaways
- Open Customer-Specific Purchases
- Order Activity
- Orders
- Pre-Settlement List
- Price Exceptions
- Purge Settlement History
- Quotes
- Reprint Tickets
- Settlement
- Store Credit List
- Ticket Journal
- X-Tape
- Z-Tape

### INVENTORY REPORTS

- Adjustments
- Committed Inventory
- Customer Price List
- **Historical Valuation\***
- **Inventory Analysis\***
- Inventory History
- **Inventory Snapshot\***
- Inventory Status
- Item Price List
- Item Price-1 List
- Items
- Items on Sale
- Markdowns
- **Merchandise Analysis\***
- Physical Count
- Physical Count Worksheet
- Planned Promotions
- Price Rules
- Prices
- Purge Inactive Items
- Quick Transfer Summary
- Quick Transfers
- Recalc Item Quantities
- Reconcile
- **Serial Numbers\***
- **Six Week Item History\***
- Stock Status
- Transfer Advice
- Transfer In
- Transfer Out
- Transfer Status
- **Twelve Month Item History\***
- Valuation

### CUSTOMER REPORTS

- Adjustments
- Aging
- Calculate Finance Charges
- Cash Receipts
- Customers
- Finance Charges
- Loyalty Points
- Open and Unposted Documents
- Point Adjustments
- Point History
- Point Redemptions
- Purge Inactive Customers
- Recalc Customer Balances
- Statements

### PURCHASING REPORTS

- Customer-specific Purchases
- Purchase Adjustments
- Purchase Orders
- Purchase Requests
- **Purchasing Advice\***
- Quick Receiving
- Receiving
- Returns to Vendor
- Vendors

### SALES HISTORY REPORTS

- Commissions Due
- **Flash Sales\***
- Management History
- Price Exceptions History
- Purge Ticket History
- Return Tickets
- **Sales Analysis by Group\***
- **Sales History by Customer by Item\***
- Sales History by Item by Customer
- Sales History by Sales Rep
- **Sales Rep Productivity\***
- Tax History
- Tax Exceptions
- Voided Tickets

### TIMECARD REPORTS

- Export Timecards
- Purge Timecards
- Timecards Report

### SYSTEM REPORTS

- Distributions Report
- Closed Gift Certificates
- Closed Store Credits
- Gift Certificate List
- Interface Distributions
- Purge Distributions
- Store Credit List
- Unvouchered Receiving
- Vouchered Receiving

\* Key report

## FLASH SALES

- High-level view of store operations
- Time period comparisons
- Pie charts for at-a-glance synopsis

### OVERVIEW

The **Flash Sales Report** provides a brief, one-page synopsis of sales activity for a specified period of time. It summarizes the total sales, number of tickets, average sales amount per ticket, and the gross profit for each store during the reported period and can be used to compare two different time periods.

You can also show percent of total values (e.g., Corporate Office was 39% of total sales), or include a pie chart for an at-a-glance understanding of the data.

### REPORT PARAMETERS

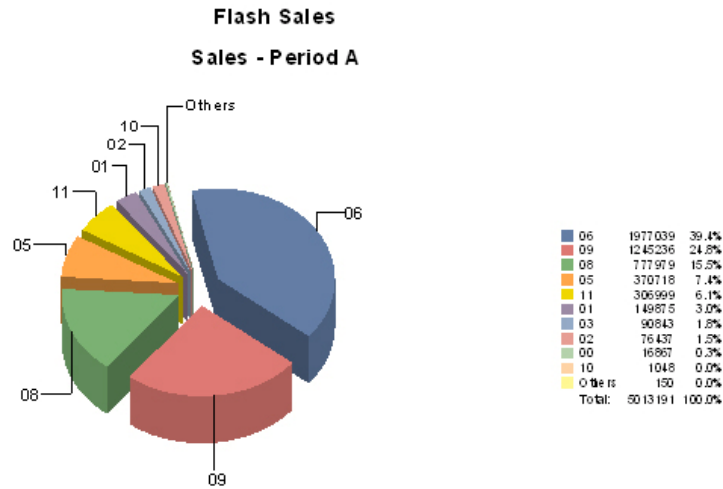
Flash Sales is a powerful reporting and analysis tool that lets you define and present your own analysis of store operations. You can rank sales, profits, number of tickets, number of returns, etc.

## SAMPLE REPORT

### All Stores in a One Month Period Ordered by Retail Sales

Date 3/9/2007 Time 2:26:33PM

Page 1



Period A: From 01/01/2007 thru 01/31/2007

Order by Sales (Retail) in period A  
Store: All  
Dollar amounts are rounded to the nearest dollar.  
Quantities are rounded to the nearest integer.  
Percents of total are shown for each value

Store	Period	Sales % Tot	Profit \$ % Tot	Profit %	# of tickets % Tot	Average ticket
Corporate Office	A	1,977,039 39.4	284,112 35.3	14.4	789 20.7	2,506
Mall of Memphis	A	1,245,236 24.8	153,491 19.1	12.3	987 25.9	1,262
Wolfchase Mall	A	777,979 15.5	133,919 16.7	17.2	856 22.4	909
Hickory Ridge Mall	A	370,718 7.4	77,110 9.6	20.8	317 8.3	1,169
Southgate	A	306,999 6.1	73,162 9.1	23.8	392 10.3	783
Saddle Creek	A	149,875 3.0	34,291 4.3	22.9	217 5.7	691
Cordova	A	90,843 1.8	22,206 2.8	24.4	101 2.6	899
Montclair	A	76,437 1.5	22,900 2.8	30.0	122 3.2	627
Corporate	A	16,867 0.3	2,825 0.4	16.8	19 0.5	888
Griffon Court	A	1,048 0.0	184 0.0	17.6	2 0.1	524
East Warehouse	A	150 0.0	28 0.0	18.7	16 0.4	9
Report totals						
11 store(s)	A	5,013,191	804,228	16.0	3,818	1,313

-- End of report --

## HISTORICAL VALUATION

- Inventory value on a particular date
- Pie charts provide at-a-glance synopsis

### OVERVIEW

The **Historical Valuation Report** lets you see the value of your inventory on a specific date. It also allows you to review on-hand quantities, estimated costs, and total retail value for each item, as well as the percentage-to-total ratios for these values.

### REPORT PARAMETERS

Analyze inventory at the group level (by category, primary vendor, etc.) or include item-level detail

Display pie charts

Specify the valuation date

Identify the best or worst performers (e.g., top 10 categories or bottom 5 vendors), or include all groups

Analyze individual items or groups of inventory. For individual items, the report indicates retail values as well as the corresponding markup percentages. For groups of items, the report includes quantities, costs, and retail value.

Include all items on the report, or focus the report on the strongest or weakest products in each group. For example, you could identify the top ten categories or the bottom five vendors.

Use item and inventory filters to specify additional criteria for your report—view the value of all items, items from one vendor, or items in a specific category that are stocked at one particular location or all locations.

Analyze inventory at the group level (by category, primary vendor, etc.) or include item-level detail

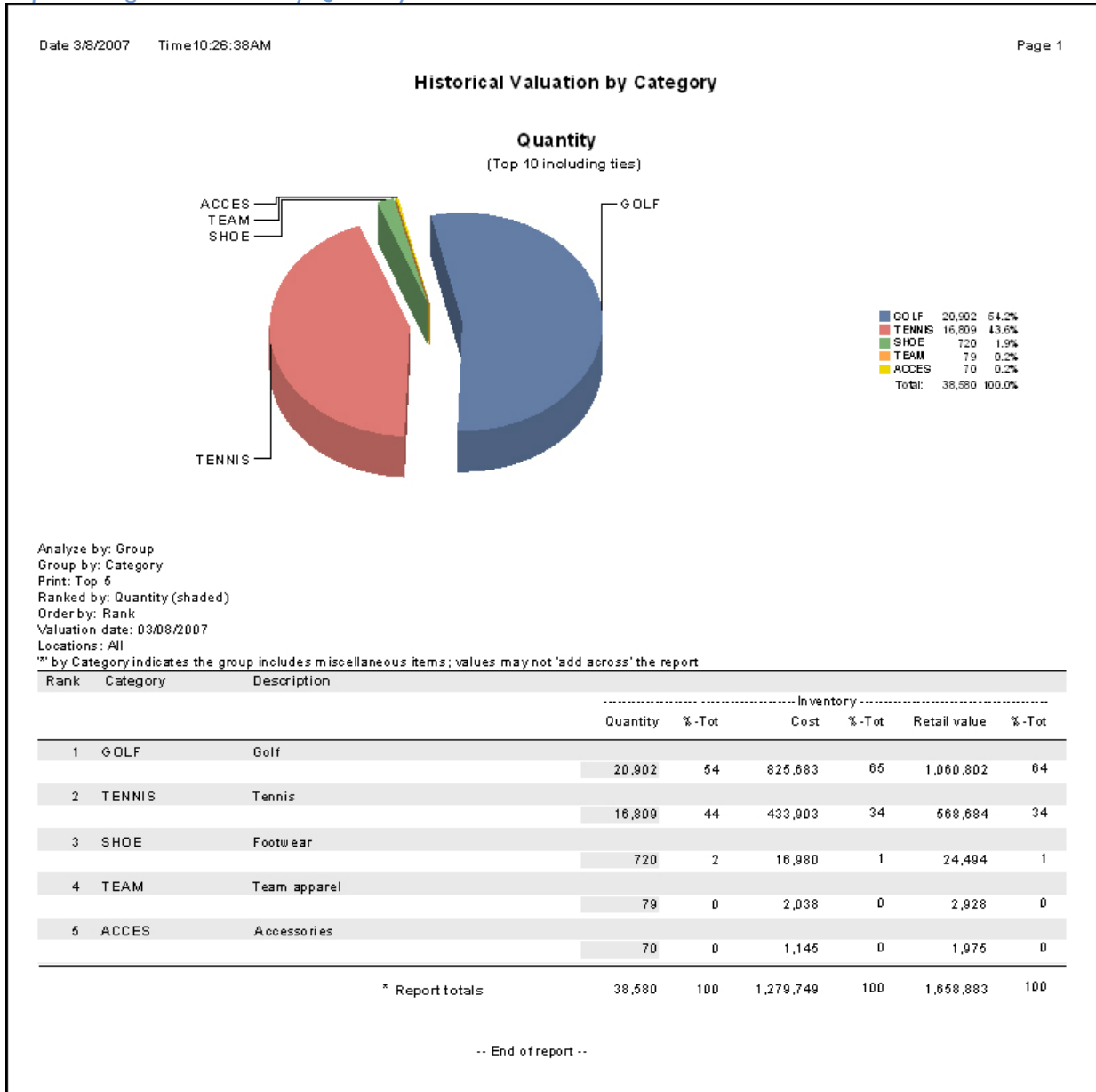
Display pie charts

Specify the valuation date

Identify the best or worst performers (e.g., top 10 categories or bottom 5 vendors), or include all groups

## SAMPLE REPORT

### Top 5 Categories Ranked by Quantity



## INVENTORY ANALYSIS

- Analyze performance and stocking conditions
- Determine reorders and markdowns

### OVERVIEW

The **Inventory Analysis Report** lets you view inventory activity at the category or item level over a specific date range. Use this report to determine which items should be reordered, marked down, or discontinued.

### REPORT PARAMETERS

You can report on overstocked or under stocked items and analyze retail value and on-hand profit potential.

Use item filters to specify additional report criteria.

## SAMPLE REPORTS

### Top 10 Items Ranked by Inventory Value

Date 3/9/2007 Time 3:33:52PM Page 1

Inventory Analysis by Item

Select top: 10  
Location: Wolfchase Mall  
Ranked by: Inventory value (shaded)

Rank	Item # Description	Qty on hand	Qty committed	Qty on P O	Retail value	Profit value	Profit %	Inv value
1	1995431 Adidas A3 3-Stripe Golf Shoe	65	0	0	2,738.00	562.00	20.16	2,186.00
2	1998332 Cleveland HiBore Irons 3-PW	8	1	0	1,918.00	386.00	20.13	1,532.00
3	8712325 Diamond D-17 19pc Package Set	7	0	0	1,269.00	257.00	20.25	1,012.00
4	7788995 Ogio Vaporlite Carry Bag	13	3	0	1,316.00	360.00	27.36	956.00
5	7789920 Maxfli PowerMax Fairway Wood	11	0	0	1,091.00	152.00	13.93	939.00
6	2145512 Taylor Made Miscela 7 Piece Set	0	0	0	0.00	-808.00	0.00	808.00
7	9984711 Jack Nicklaus Q4 Fairway Wood	15	0	0	969.00	257.00	26.52	712.00
8	3041152 Golf Pride Pro Putter Replacement Grip	146	2	0	878.00	170.00	19.36	708.00
9	4600155 TaylorMade Divot Repair Tool	74	0	0	889.00	252.00	28.35	637.00
10	0045774 Top Flite XL Plus Distance Golf Balls	49	1	0	839.00	217.00	25.86	622.00
Report totals		390	7	0	11,907.00	1,796.00	15.08	10,112.00

-- End of report --

### Top 5 Categories Ranked by Quantity on Hand

Date 3/9/2007 Time 11:24:42AM Page 1

Inventory Analysis by Category (Summary)

Select: Top : 5  
Location: MAIN  
Ranked by: Category Inventory value

Rank	Category Description	Qty on hand	Qty committed	Qty on P O	Retail value	Profit value	Profit %	Inv value
1	GOLF Golf	20,902	12	32	1,060,802.1800	235,118.84	22.16	825,683.34
2	TENNIS Tennis	16,809	9	439	568,683.9800	134,781.32	23.70	433,902.66
3	SHOE Footwear	1,720	0	0	24,494.0000	7,513.75	30.68	16,980.25
4	TEAM Team apparel	379	0	0	2,928.0500	890.15	30.40	2,037.90
5	ACCES Accessories	170	0	0	1,975.1900	830.36	42.04	1,144.83
Report totals		39,980	21	471	1,658,883.40	379,134.42	22.85	1,279,748.98

-- End of report --

# INVENTORY SNAPSHOT

- Summary of what you sold, owned, and ordered
- Quickly review quantities for items and locations

## OVERVIEW

The **Inventory Snapshot Report** lets you see either a detailed or summarized list of ‘What I sold,’ ‘What I own,’ and ‘What I have on order.’ This report allows you to quickly review the quantity on hand, quantity on PO, and quantity sold values for your items and locations. It provides a simple snapshot of the current status and sales history of your inventory.

## REPORT PARAMETERS

Choose from several different report formats: Item Summary, Item-Location Detail, or Location-Item Detail.

Use the item and inventory filters to limit the items that appear on the report.

## SAMPLE REPORTS

### Summary of All Items in the Golf Category Ordered by Inventory Value

Date 3/12/2007 Time 10:19:43AM Page 1

Inventory Snapshot (Item Summary)

Report period: 01/01/2006 to 01/31/2006 (31 days)  
 Item: Item category between GOLF and GOLF  
 Location: Wolfchase Mall  
 Inventory: Location is (exactly) 01CR and  
 G/L value not equal to 0.00  
 Order by: Inv value, Item #

Item #	Description	Inv-val	Qty on hand	Qty on PO	Qty sld	% Sld	Wks OH
FED106788	Diamond D-17 19pc Package Set	4,590.40	16	0	1	5.9	34.3
GEA101499	Golden Bear 460 11pc Set with Bag	3,975.00	15	0	0	0.0	0.0
GEA100598	TaylorMade ACGB Lambeau 7 Putter	3,090.00	30	0	0	0.0	0.0
DAC353085	Wilson Pro Staff Performance Glove	2,990.00	111	10	1	50.0	52.1
AMA100105	Bridgestone E5 Golf Balls	2,652.00	217	0	3	15.0	95.5
GEA101899	TaylorMade R580 XD Driver	2,646.00	9	0	1	10.0	69.3
GEA101099	TaylorMade r7 Ti Fairway Woods	2,576.00	24	0	1	6.7	30.0
FRI103364	Adidas a3 3-Stripe Mens Golf Shoe	2,560.00	15	0	0	0.0	8.2
AIR101399	Oakland Raiders Bucket of Golf Balls	2,492.88	24	0	0	0.0	2.1
FRI102147	Cougar Ti Cat 12 Piece Package Set	2,120.00	20	0	0	0.0	60.7
FRI108558	Mitsushiba Rising Star Golf Set - Yellow	1,980.00	15	0	0	0.0	60.7
AMA100799	Bushnell Yardage Trophy Rangefinder	1,832.00	8	20	2	20.0	28.6
AMA104876	X Line Replacement Grips - 13 Pack	1,680.00	14	0	1	6.7	30.0
FRI101875	Burton Scout Carry Bag	1,656.00	9	0	6	40.0	78.2
GEA101299	Cougar X-Cat II Dual Stand Bag	1,624.00	28	0	8	50.0	52.1
AMA107403	Diamond D-17 19pc Package Set	1,600.00	5	0	1	16.7	60.7
GEA100898	Adidas Powerband Golf Shoe	1,470.00	10	0	2	16.7	60.7

### Location-Item Detail for Items from a Specific Vendor

Date 3/12/2007 Time 1:47:56PM Page 1

Inventory Snapshot (Location-Item Detail)

Report period: 01/01/2006 to 01/31/2006 (31 days)  
 Item: Primary vendor between NIKE and NIKE  
 Location: All  
 Inventory: G/L value not equal to 0 or  
 Qty on PO's not equal to 0.0000 or  
 Qty on hand not equal to 0  
 Order by: Location, Item #

Location	Atlanta	Item #	Description	Inv-val	Qty on hand	Qty on PO	Qty sld	% Sld	Wks OH
		UN001706	Nike Hammer Camo- Men's	125.58	0	1	0	0.0	0.0
Location	Birmingham	Item #	Description	Inv-val	Qty on hand	Qty on PO	Qty sld	% Sld	Wks OH
		AG A35385	Air Force 25 Premium - Men's	2,685.00	21	0	0	0.0	0.0
		WH1126275	Nike Team Training Lacrosse Duffel	608.91	11	0	0	0.0	0.0
Birmingham totals				3,293.91	32	0	0	0.0	0.0
Location	Charleston	Item #	Description	Inv-val	Qty on hand	Qty on PO	Qty sld	% Sld	Wks OH
		AIR101399	Nike Air Max 95 iD	2,492.88	24	0	0	0.0	0.0
		AIR104290	Nike Air Max 360	1,694.76	14	0	0	0.0	0.0
		AIR107772	Nike Air Max Groove	1,242.00	26	0	1	11.1	26.6

## MERCHANDISE ANALYSIS

- Hot/Cold analysis
- Determine buying opportunities and markdowns
- More than 180 fields to choose from

### OVERVIEW

The **Merchandise Analysis Report** lets you see the current state and the past performance of your inventory. Use this report to determine when to take advantage of opportunistic buys and which items to mark down.

### REPORT PARAMETERS

The report allows ranking of categories, items, or vendors and can be based on a variety of figures, including retail calculations such as turn rate and gross margin return on investment.

Analyze merchandise at the item or group level

Identify the best or worst performers (e.g., top 10 categories or bottom 5 vendors)

Choose a pre-defined group of columns to display in the report, or choose any of over 180 columns

Select which columns to display from over 180 available choices. Use the Item and Inventory tabs to filter the information that appears on the report.

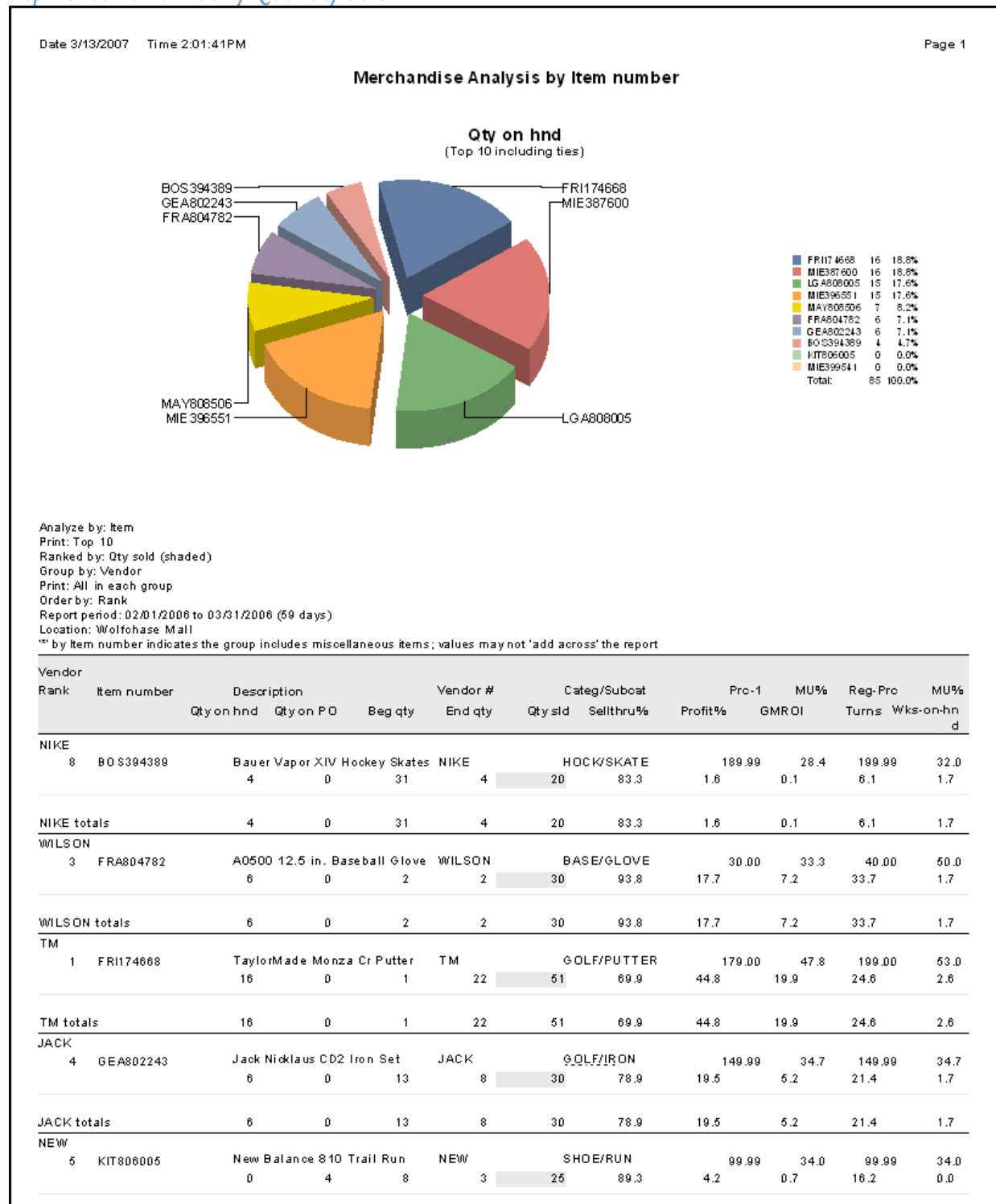
Analyze merchandise at the item or group level

Identify the best or worst performers (e.g., top 10 categories or bottom 5 vendors)

Choose a pre-defined group of columns to display in the report, or choose any of over 180 columns

## SAMPLE REPORTS

### Top 10 Items Ranked by Quantity Sold



### Top 10 Vendors Ranked by Number of Transactions

Date 3/12/2007 Time 4:00:43PM Page 1

Merchandise Analysis by Primary vendor  
Quantities

Analyze by: Group  
Group by: Primary vendor  
Print: Top 10  
Ranked by: # of trx (shaded)  
Order by: Rank  
Report period: 01/01/2006 to 02/28/2006 (59 days)  
Locations: All  
\* by Primary vendor indicates the group includes miscellaneous items; values may not 'add across' the report

Rank	Primary vendor	Vendor name	# of trx	Qty sld	Sales	Cost of sales	Profit	Profit%
1	NIKE	Nike	105,227	2,388	1,385,714	1,234,847	150,867	10.9
2	ADIDAS	Adidas	47,032	1,235	562,084	446,352	115,732	20.6
3	CALL	Callaway Golf	36,578	809	465,464	351,676	113,788	24.4
4	TITLE	Titleist	29,254	568	749,642	637,172	112,470	15.0
5	TM	TaylorMade	29,207	515	802,862	736,650	66,212	8.2
6	NEW	New Balance	29,011	1,078	549,458	452,730	96,728	17.6
7	SAUCO	Saucony	17,275	225	396,543	334,600	61,943	15.6
8	DUN	Dunlop	17,173	151	192,886	163,611	29,075	15.1
9	FJ	FootJoy	16,045	32	20,167	16,465	3,703	18.4
10	WILSON	Wilson	15,229	192	136,308	107,987	28,320	20.8
* Report totals			342,031	7,193	5,260,927	4,482,090	778,838	14.8

-- End of report --

### Historical Retail Value by Category

Date 3/13/2007 Time 3:50:35PM Page 1

Merchandise Analysis by Category  
Retail Value History - Brief

Analyze by: Group  
Group by: Category  
Print: All  
Ranked by: Retail of sales (shaded)  
Order by: Group (Category)  
Report period: 01/01/2006 to 02/01/2006 (32 days)  
Location: 06CR  
\* by Category indicates the group includes miscellaneous items; values may not 'add across' the report

Rank	Category	Description	Beg retl	Retail recvd	Retl of sts	Retl of adjs	Retail transferred	End retl
11	SKI	Ski	13,490	0	0	-1,025	0	12,114
8	ACCES	Accessories	13,097	0	0	-920	-640	11,538
2	GOLF	Golf	3,449	0	1,329	29	2,838	4,987
7	BASE	Baseball	0	0	429	0	1,848	1,420
1	BKB	Basketball	3,629	0	1,780	-699	1,250	2,400
10	FOOT	Football	650	0	0	-300	350	700
5	* SOCCR	Soccer	7,487	0	1,178	-4,367	848	2,790
4	* SWIM	Swimming	6,863	0	1,229	1,640	2,298	9,602
3	EXER	Exercise	2,190	0	1,240	190	340	1,480
6	APPAR	Apparel	5,815	0	1,000	-429	3,230	9,915
12	VB	Volleyball	549	0	0	0	0	549
9	* DIVE	Dive	0	0	0	0	0	0
* Report totals			57,219	0	8,185	-5,882	12,362	57,495

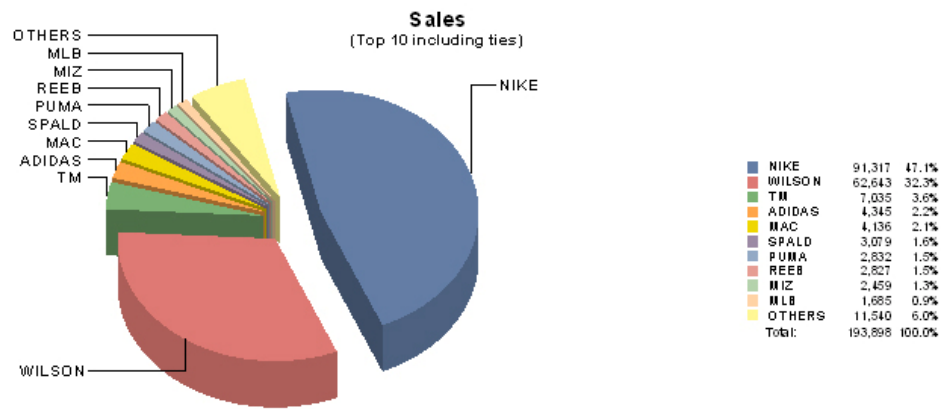
-- End of report --

Vendor Comparison Ranked by Sales with Store Details

Date 3/14/2007 Time 4:55:09PM

Page 1

Merchandise Analysis by Primary vendor



Analyze by: Group  
Group by: Primary vendor  
Print: All  
Ranked by: Sales (shaded)  
Order by: Rank  
Report period: 01/01/2004 to 07/14/2004 (196 days)  
Locations: All  
Show location detail

\* by Primary vendor indicates the group includes miscellaneous items; values may not 'add across' the report

Rank	Primary vendor	Vendor name	Location	Sales	Avg balance (cost)	Profit	Profit%	GMROI	Turns
1	* NIKE	Nike	DISTRIB	2,384	938	2,230	93.5	4.4	0.3
			LONG	81	18	81	100.0	8.6	0.0
			SPRINGS	753	34	543	72.1	30.0	11.6
			STORE	86,703	16,205	81,509	94.0	9.4	0.6
			TRAVEL	1,382	157	1,271	92.0	15.1	1.3
			WHO USE	0	11,603	0	0.0	0.0	0.0
			YOUTH	13	0	13	100.0	0.0	0.0
			<b>NIKE totals</b>	<b>91,317</b>	<b>28,955</b>	<b>85,647</b>	<b>93.8</b>	<b>5.5</b>	<b>0.4</b>
2	* WILSON	Wilson Sporting Goods	DISTRIB	9,299	6,479	8,629	92.8	2.5	0.2
			LONG	35	29	33	92.9	2.1	0.2
			SPRINGS	729	27	597	81.9	41.1	9.1
			STORE	34,731	2,860	29,879	86.0	19.5	3.2
			TRAVEL	17,653	-964	15,182	86.0	-29.3	-4.8
			WHO USE	0	154,340	0	0.0	0.0	0.0
			YOUTH	196	0	196	100.0	0.0	0.0
			<b>WILSON totals</b>	<b>62,643</b>	<b>162,771</b>	<b>54,515</b>	<b>87.0</b>	<b>0.6</b>	<b>0.1</b>
3	TM	TaylorMade	DISTRIB	297	66	71	24.0	2.0	6.4
			LONG	78	68	32	40.2	0.9	1.3
			SPRINGS	353	41	144	40.8	6.5	9.5
			STORE	6,141	7,345	2,429	39.5	0.6	0.9
			TRAVEL	85	14	34	40.3	4.5	6.6
			WHO USE	0	0	0	0.0	0.0	0.0
			YOUTH	82	7	34	41.0	9.0	13.0
			<b>TM totals</b>	<b>7,035</b>	<b>7,541</b>	<b>2,743</b>	<b>39.0</b>	<b>0.7</b>	<b>1.1</b>
4	ADIDAS	Adidas	DISTRIB	0	11	0	0.0	0.0	0.0
			LONG	0	6	0	0.0	0.0	0.0
			SPRINGS	130	27	62	47.3	4.2	4.7
			STORE	3,857	2,805	1,847	47.9	1.2	1.3
			TRAVEL	358	88	160	44.9	3.4	4.2

## PURCHASING ADVICE

- ⌘ Automatically calculates and creates restocking orders
- ⌘ Based on Min/Max or Replenishment method
- ⌘ Create one PO for all locations or separate PO's for each location

### OVERVIEW

The **Purchasing Advice Report** calculates quantities to reorder based on current inventory levels, commitments, backorders, in-transit merchandise, open PO's, desired stocking levels, vendor multiples, and/or vendor minimum order requirements.

**Purchasing Advice** calculates reorder quantities using one of the following methods:

- **Maximum**—Orders an item up to its desired maximum stocking level when it falls to or below its minimum (reorder) level. Minimum and maximum levels are defined for each item at each location. For gridded items, levels can be defined for each cell (color/size/pattern levels).
- **Replenishment**—Orders enough of an item to replace what was sold during a specified time period.

### REPORT PARAMETERS

Automatically calculate and create restocking orders for one or more locations.

The screenshot shows the 'Purchasing Advice' window with the following configuration and callouts:

- Report:** Replenishment
- Order by:** Item #, Location (Callout: Order by item number then location, or by location then item number)
- Parameters:** Item, Inventory
- Locations:** All (selected), Single location: MAIN, Location group: (empty)
- Adjust suggested qty for:** Purchase requests (unchecked), Open PO's (unchecked), Vendor minimum (unchecked), Vendor multiple: Round to nearest multiple
- Report:** Print cell detail: Grid view (selected), Print cell qty: Suggested, Show all qtys (unchecked)
- Replenish based on:** Sales from: 03/31/2006, To: 03/31/2007, History factor: 1.00 (Callout: Optionally enter a history factor to order, for example, 20% more or 5% less)
- Buttons:** Preview, Print, Generate (Callout: Automatically generate the Purchase Request), Options >>, Close, Help

Additional callouts:

- Enter a single purchase request for multiple stocking locations and create either a single merged PO for all locations or a separate PO for each location (points to the 'All' radio button)
- Include color/size details for gridded items (points to the 'Grid view' radio button)

## SAMPLE REPORT

### Replenishment Calculation Method Featuring Gridded Item Details

Date 4/10/2007 Time 2:56:47PM

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Purchasing Advice Report - Replenishment

All locations  
Qty sold from 03/31/2006 to 03/31/2007  
Cell detail in Grid view - Suggested qty  
Suggested quantity is rounded to nearest vendor multiple. (Gridded items are not adjusted.)  
History factor 1.00  
Order by Item #, Location  
Item: Item category is (exactly) APPAREL and  
Status is (exactly) Active

Item #	Description	Vendor #		Vendor's item #				
APL-HAT	Golf hat with logo - 1 size	** None **						
Location	Avg unit cost	Qty on PO	Min qty	Qty slt	Adjusted quantity	Unit	Ext last cost	Margin %
	Last cost	Qty on PR's	Max qty		Quantity needed		Ext vend cost	
	Vendor unit cost	Qty on order	Qty on hand				Retail value	
MAIN	4.2724	0	10	1	1	EACH	5.20	59.97 %
	5.1960	0	50					
		0	17				12.99	

Item #	Description	Vendor #		Vendor's item #				
SHIRT	Men's Polo 100% cotton	IZOD		SHIRT				
Location	Avg unit cost	Qty on PO	Min qty	Qty slt	Adjusted quantity	Unit	Ext last cost	Margin %
	Last cost	Qty on PR's	Max qty		Quantity needed		Ext vend cost	
	Vendor unit cost	Qty on order	Qty on hand				Retail value	
MAIN	12.9900	0	27	3	3	EACH	38.97	48.02 %
	12.9900	0	135				38.97	
	12.9900	0	159				74.97	

	Small	Medium	Total
Blue	1	2	3
Total	1	2	3

Item #	Description	Vendor #		Vendor's item #				
SHOES	Women's golf shoes	FOOTJOY		SHOES				
Location	Avg unit cost	Qty on PO	Min qty	Qty slt	Adjusted quantity	Unit	Ext last cost	Margin %
	Last cost	Qty on PR's	Max qty		Quantity needed		Ext vend cost	
	Vendor unit cost	Qty on order	Qty on hand				Retail value	
MAIN	34.2933	0	16	4	4	EACH	130.00	56.66 %
	32.5000	0	96				139.96	
	34.9900	1	21				299.96	

	Narrow	Wide	Total
Blue	0	1	1
Multi	1	0	1
White	0	1	1
	0	1	1
Total	1	3	4

Item #	Description	Vendor #		Vendor's item #				
SHORTS	Shorts - Men's Twill Pleated	IZOD		SHORTS				
Location	Avg unit cost	Qty on PO	Min qty	Qty slt	Adjusted quantity	Unit	Ext last cost	Margin %
	Last cost	Qty on PR's	Max qty		Quantity needed		Ext vend cost	
	Vendor unit cost	Qty on order	Qty on hand				Retail value	
MAIN	14.9900	0	42	1	1	EACH	14.99	46.45 %
	14.9900	0	252				14.99	
	14.9900	0	79				27.99	

	34	Total
Blue	1	1
Total	1	1

## SALES ANALYSIS BY GROUP

- Define your own analysis of store operations
- Choose from over 120 different groupings
- Analyze historical or theoretical sales

### OVERVIEW

The **Sales Analysis by Group Report** is a powerful reporting and analysis tool that lets you define and present dozens of different analyses of historical ticket sales—with or without pie charts.

Choose from more than 120 different groupings, including item number, item category, customer zip code, customer category, customer profile fields, user, store, vendor, hour of the day, and many more. For gridded items, you can track sales by cell (color/size/pattern) within categories/subcategories or for specific item numbers.

Display up to three reporting periods for each group. You can print all members of a group or, for example, just the top 10 members. You can run the report for one or more days, for one or more stores, and for a multitude of other criteria. You can even view theoretical sales—as if all goods had been sold at the retail price.

### REPORT PARAMETERS

**Sales Analysis by Group** lets you define and present your own analysis of store operations.

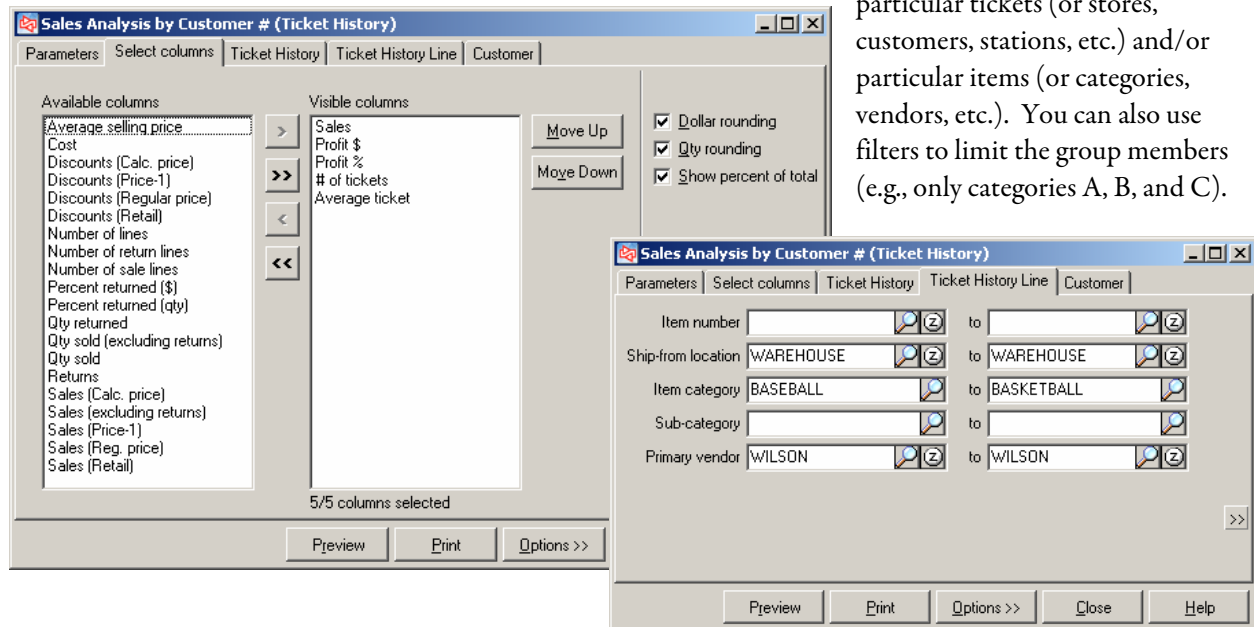
The screenshot shows the 'Sales Analysis by Customer # (Ticket History)' dialog box. It has several tabs: Parameters, Select columns, Ticket History, Ticket History Line, and Customer. The 'Parameters' tab is active. Callouts point to various fields:

- Group by:** (Ticket History) Customer #. Callout: "Choose from over 120 different groupings".
- Print:** Top. Callout: "Identify the best or worst performers in the group (e.g., top 10 customers or the worst hour of the day)".
- Print in order by:** By customer #.
- Report periods:** Three periods are selected (A, B, C) with dates from 2005 to 2007. Callout: "Display up to three reporting periods for each group".
- Rank period:** A radio button is selected for the first period (2007).
- Include groups with no history:** Unchecked. Callout: "Include groups with no history so you can show, for example, all your sales reps whether or not they had sales".
- Show pie chart:** Checked.
- Store:** 00 Corporate. Callout: "Store-level groupings summarize a store's activity, including ticket lines, sale amounts, and profitability".

Buttons at the bottom: Preview, Print, Options >>, Close, Help.

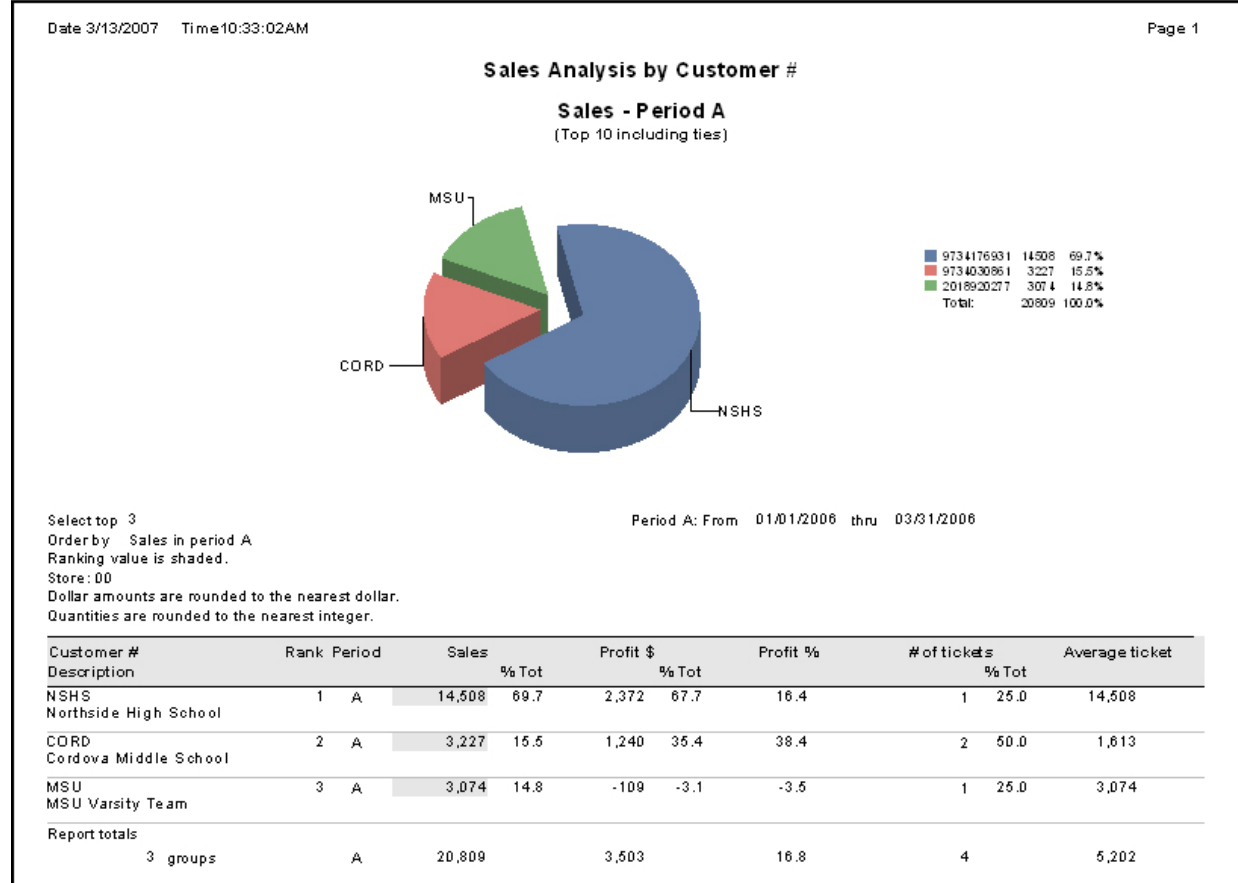
Use the standard columns, or select to print up to eleven analysis columns from a list that includes sales, cost, profit, profit percent, quantity sold, number of lines, average ticket amount, etc. Use filters to limit the report to

particular tickets (or stores, customers, stations, etc.) and/or particular items (or categories, vendors, etc.). You can also use filters to limit the group members (e.g., only categories A, B, and C).



## SAMPLE REPORTS

### Top Three Customers Ranked by Sales



### Sales Analysis by Cell Ranked by Profit

Date 3/13/2007 Time 11:13:39AM

Page 1

Sales Analysis by Cell (Cat-Subcat-Cell)

Select all

Period A: From 01/01/2006 thru 03/13/2007

Order by Profit \$ in period A

Ranking value is shaded.

Store: 11

Dollar amounts are rounded to the nearest dollar.

Quantities are rounded to the nearest integer.

Cell (Cat-Subcat-Cell) Description	Rank	Period	Sales	% Tot	Profit \$	% Tot	Profit %	# of tickets	Average ticket
950-9505 N/A	1	A	76,173	3.5	76,173	21.1	100.0	360	212
130-1305 N/A	2	A	150,667	7.0	33,179	9.2	22.0	258	584
110-1120 N/A	3	A	95,099	4.4	27,002	7.5	28.4	179	531
110-1140 N/A	4	A	83,786	3.9	26,677	7.4	31.8	98	855
120-1205 N/A	5	A	86,767	4.0	19,892	5.5	22.7	181	479
150-1510 N/A	6	A	90,034	4.2	15,617	4.3	17.3	116	776
160-1640 N/A	7	A	149,653	7.0	15,434	4.3	10.3	123	1,217
330-3305 N/A	8	A	69,471	3.2	11,908	3.3	17.1	66	1,053
120-1210 N/A	9	A	49,977	2.3	11,638	3.2	23.3	101	495
160-1625 N/A	10	A	49,611	2.3	9,320	2.6	18.8	105	472
180-1805 N/A	11	A	42,496	2.0	7,486	2.1	17.6	122	348
150-1515 N/A	12	A	45,272	2.1	5,902	1.6	13.0	34	1,332
340-3475 N/A	13	A	75,639	3.5	5,539	1.5	7.3	16	4,727
340-3450 N/A	14	A	58,358	2.7	5,336	1.5	9.1	25	2,334
140-1450 N/A	15	A	38,506	1.8	5,038	1.4	13.1	23	1,674
392-3926 N/A	16	A	38,252	1.8	4,868	1.3	12.7	14	2,732
360-3675 N/A	17	A	64,328	3.0	4,825	1.3	7.5	16	4,021
150-1505 N/A	18	A	32,887	1.5	4,639	1.3	14.1	74	444
250-2510 N/A	19	A	12,225	0.6	4,492	1.2	36.7	28	437
800-8005 N/A	20	A	13,787	0.6	4,026	1.1	29.2	159	87
350-3570 N/A	21	A	27,125	1.3	3,816	1.1	14.1	20	1,356
140-1410 N/A	22	A	23,125	1.1	3,815	1.1	16.5	32	723
399-3996 N/A	23	A	19,061	0.9	3,781	1.0	19.8	60	318
360-3670 N/A	24	A	17,992	0.8	3,748	1.0	20.8	4	4,498
160-1620 N/A	25	A	18,523	0.9	3,633	1.0	19.6	50	370
385-3853 N/A	26	A	21,620	1.0	3,557	1.0	16.5	28	772

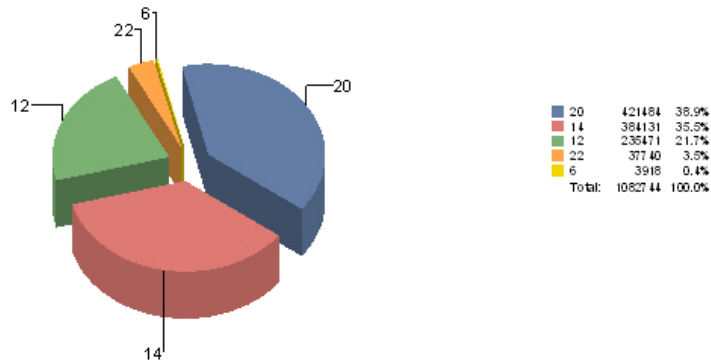
### Most Profitable Hours of the Day

Date 3/13/2007 Time 10:53:35AM

Page 1

#### Sales Analysis by Hour of day

Sales - Period A  
(Top 10 including ties)



Select top 5  
Order by Profit % in period A  
Ranking value is shaded.  
Store: 09  
Dollar amounts are rounded to the nearest dollar.  
Quantities are rounded to the nearest integer.

Period A: From 01/01/2006 thru 03/13/2007

Hour of day Description	Rank	Period	Sales	% Tot	Profit \$	% Tot	Profit %	# of tickets	% Tot	Average ticket
6 6:00	1	A	3,918	0.4	2,132	1.1	54.4	2	0.2	1,959
22 22:00	2	A	37,740	3.5	8,001	4.3	21.2	28	2.9	1,348
20 20:00	3	A	421,484	38.9	78,938	42.4	18.7	344	35.5	1,225
14 14:00	4	A	384,131	35.5	60,525	32.5	15.8	356	36.7	1,079
12 12:00	5	A	235,471	21.7	36,860	19.7	15.6	239	24.7	985
<b>Report totals</b>										
	5 groups	A	1,082,744		186,256		17.2	969		1,117

-- End of report --

## SALES HISTORY BY CUSTOMER BY ITEM

- Analyze sales based on customers
- Identify items sold to customers

### OVERVIEW

The *Sales History by Customer by Item Report* shows selected customers and the items that they purchased, along with the applicable sales, quantities, profitability, and percent-of-totals figures. Run the report for a selected range of items, customers, stores, dates, categories, or any other reportable criteria.

### REPORT PARAMETERS

Analyze what merchandise is being sold and who is purchasing that merchandise.

Use the ticket history and item filters to limit which tickets and items appear on the report.

## SAMPLE REPORT

### Sales History by Customer by Item Ordered by Customer Name

Date 3/16/2007		Time 11:28:55AM		Page 1 of 25									
Sales History by Customer by Item													
Orderby: Name, Item #, Ticket #													
Customer: Customer # between 1000 and 10490													
Customer #	Name	Description	Qty sold	Qty sold in stk-units	Sales	Grp pft	Grp pft %	Percent of total					
Item #								Qty	Sales	Grp pft			
10062	Avery Middle School												
100013		Catalog	1	1.00	0.00	0.00	0.0						
100032		Sports Pass	1	1.00	0.00	0.00	0.0						
1067		Advanced Golf Lessons DVD	1	1.00	36.00	36.00	100.0						
1139		Intermediate Golf Lessons DVD	1	1.00	36.00	36.00	100.0						
138		Beginner Golf Lessons DVD	6	6.00	240.00	240.00	100.0						
80194		Drymax Sport Sock Crew	1	1.00	12.98	12.98	100.0						
Totals for customer 10062			6 items	11	11.00	324.98	324.98	100.0	0.4	0.5	0.6		
10429	Birmingham Sports Center												
10108		NBA Logoman Shooter Sleeve	1	1.00	15.00	7.83	52.2						
10151		Bike Rattler Shoulder Pad w/ Sternum	1	1.00	39.95	15.98	40.0						
139		Douglas AD Series Football Back Plate	6	6.00	240.00	240.00	100.0						
150		Jazzercise 1-Day Pass	2	2.00	0.00	0.00	0.0						
152		Sports Arena Day Pass	1	1.00	0.00	0.00	0.0						
25052		Louisville Slugger 11" Baseball Glove	1	1.00	30.00	12.03	40.1						
80137		Bridgestone E5 Golf Balls	1	1.00	20.00	10.00	50.0						
80138		Maxfli Powermax Distance Golf Balls	1	1.00	20.00	10.00	50.0						
90001		SPRI Yoga Ball Program	1	1.00	19.99	7.99	40.0						
90014		Cory Everson Blue Yoga Mat	1	1.00	19.99	9.95	49.8						
99300		Rawlings Renegade 30" Catcher's Mitt	1	1.00	39.98	39.98	100.0						
99400		Top Flite XL Plus Personalize Golf Balls	1	3.00	39.98	28.73	71.9						
COMB-DVD		Complete Golf Training DVD Set	9	9.00	900.00	900.00	100.0						
D040710		Body Wisdom Yoga DVD	1	1.00	15.00	15.00	100.0						
V2004		Rawlings Rush Gold Adult Baseball Bat	1	1.00	300.00	300.00	100.0						
Totals for customer 10429			15 items	29	31.50	1,699.89	1,597.49	94.0	1.0	2.4	2.9		
10052	Cordova Middle School												
100000		Mitsubishi HES Driver - Graphite Shaft	1	1.00	120.00	120.00	100.0						
Totals for customer 10052			1 items	1	1.00	120.00	120.00	100.0	0.0	0.2	0.2		
10095	Daniel Mooney												
100071		Gymboree 1-Day Pass	1	1.00	0.00	0.00	0.0						
100186		Club Champ Combo Pack	1	1.00	10.00	10.00	100.0						
100187		Youth Mediumweight Baseball Pants	1	1.00	10.00	10.00	100.0						
100188		Mens Mediumweight Baseball Pants	2	2.00	20.00	20.00	100.0						
100189		Woodland Hills Country Club Day Pass	1	1.00	0.00	0.00	0.0						
15000		Maxfli PowerMax Driver	1	1.00	125.00	85.00	68.0						
156		Body By Bonnie 3-Day Pass	3	3.00	0.00	0.00	0.0						
158		Free Consultation	2	2.00	0.00	0.00	0.0						
53		Custom Embroidery	1	1.00	18.00	18.00	100.0						
80169		Silk Screen	1	1.00	17.00	17.00	100.0						
90008		adidas Baseball Short Sleeve Tee Mens	1	1.00	19.99	9.99	50.0						
99300		Everlast Ultra Compression Ankle Brace	2	2.00	19.99	17.14	85.7						
99400		Chicago Bears Team Jersey	1	1.00	39.98	36.23	90.6						

## SALES REP PRODUCTIVITY

- Motivate and reward employee performance
- Identify profitable time periods

### OVERVIEW

The **Sales Rep Productivity Report** allows managers to monitor the productivity of sales reps in units and dollars sold per hour. This report is useful for identifying and motivating sales reps with poor performance or for rewarding superior performance.

### REPORT PARAMETERS

You can generate the report for a particular sales rep or for an entire store. You can also specify one or two date ranges for the report, allowing you to compare sales rep productivity during specific periods.

Use the user and ticket history filters to limit which users and tickets are included on the report.

## SAMPLE REPORTS

### Productivity Ordered by Sales Rep Name

Date 3/15/2007 Time 10:50:57AM Page 1

Sales Rep Productivity

Report period- A 01/01/2006 to 12/31/2006  
Print sales rep Name  
Order by: Sls rep

Sales Rep	Sales	%-of-tot-\$	Qty sold	%-of-tot-units	Hrs wrkd	%-of-tot-hrs	Sales/hr	Qty/hr
Amanda Jones	3,906.16	0.7	468.0	1.3	0.00	0.0	0.00	0.0
Beverly Jones	14,193.96	2.5	2,130.0	5.7	0.00	0.0	0.00	0.0
Brandy Daniels	624.26	0.1	58.0	0.2	0.00	0.0	0.00	0.0
Christina Tigress	46.95	0.0	11.0	0.0	0.00	0.0	0.00	0.0
Dave Waters	3,595.90	0.6	563.0	1.5	0.00	0.0	0.00	0.0
Gary Douglas	4,943.69	0.9	1,036.0	2.8	0.00	0.0	0.00	0.0
Hall Franken	75,459.72	13.3	7,713.0	20.8	0.00	0.0	0.00	0.0
Hank Smith	67,870.64	12.0	3,113.0	8.4	0.00	0.0	0.00	0.0
Hilliary Hall	149,478.37	26.4	6,139.0	16.5	0.00	0.0	0.00	0.0
House	537.00	0.1	10.0	0.0	0.00	0.0	0.00	0.0
Howard Manis	62,071.13	11.0	8,809.0	23.7	0.00	0.0	0.00	0.0
Jo Carelton	147,635.48	26.1	4,708.0	12.7	0.00	0.0	0.00	0.0
Internet	2,109.48	0.4	159.0	0.4	0.00	0.0	0.00	0.0
Larry Crump	1,705.58	0.3	222.0	0.6	0.00	0.0	0.00	0.0
Maria Hightower	587.03	0.1	77.0	0.2	0.00	0.0	0.00	0.0
Sara Barnes	230.93	0.0	40.0	0.1	0.00	0.0	0.00	0.0
Travel Station 1	10,375.97	1.8	388.0	1.0	0.00	0.0	0.00	0.0
Travel Station 2	12,387.00	2.2	494.0	1.3	0.00	0.0	0.00	0.0
Vince Aims	8,037.65	1.4	959.0	2.6	0.00	0.0	0.00	0.0
<b>Report totals</b>	<b>565,796.90</b>	<b>100.0</b>	<b>37,097.0</b>	<b>100.0</b>	<b>0.00</b>	<b>0.0</b>	<b>0.00</b>	<b>0.0</b>

-- End of report --

### Productivity Grouped by Store with Store Totals Only

Date 3/16/2007 Time 12:24:06PM Page 1

Sales Rep Productivity

Report period- A 01/01/2007 to 03/16/2007  
Group by store  
Show store totals only  
Order by: Sls rep

Store	Sales Rep	Sales	%-of-tot-\$	Qty sold	%-of-tot-units	Hrs wrkd	%-of-tot-hrs	Sales/hr	Qty/hr
<b>MALL</b>									
		116,940.69	35.0	11,271.0	42.1	0.00	0.0	0.00	0.0
<b>DISTR</b>									
		173,359.61	51.8	13,267.0	49.7	0.00	0.0	0.00	0.0
<b>WEB</b>									
		43,792.39	13.2	2,212.0	8.2	0.00	0.0	0.00	0.0
<b>Report totals</b>		<b>334,092.69</b>	<b>100.0</b>	<b>26,750.00</b>	<b>100.0</b>	<b>0.00</b>	<b>100.0</b>	<b>0.00</b>	<b>0.0</b>

-- End of report --

## SERIAL NUMBERS

- List serial numbers by item, customer, or vendor
- View available, sold, returned, or missing serial numbers

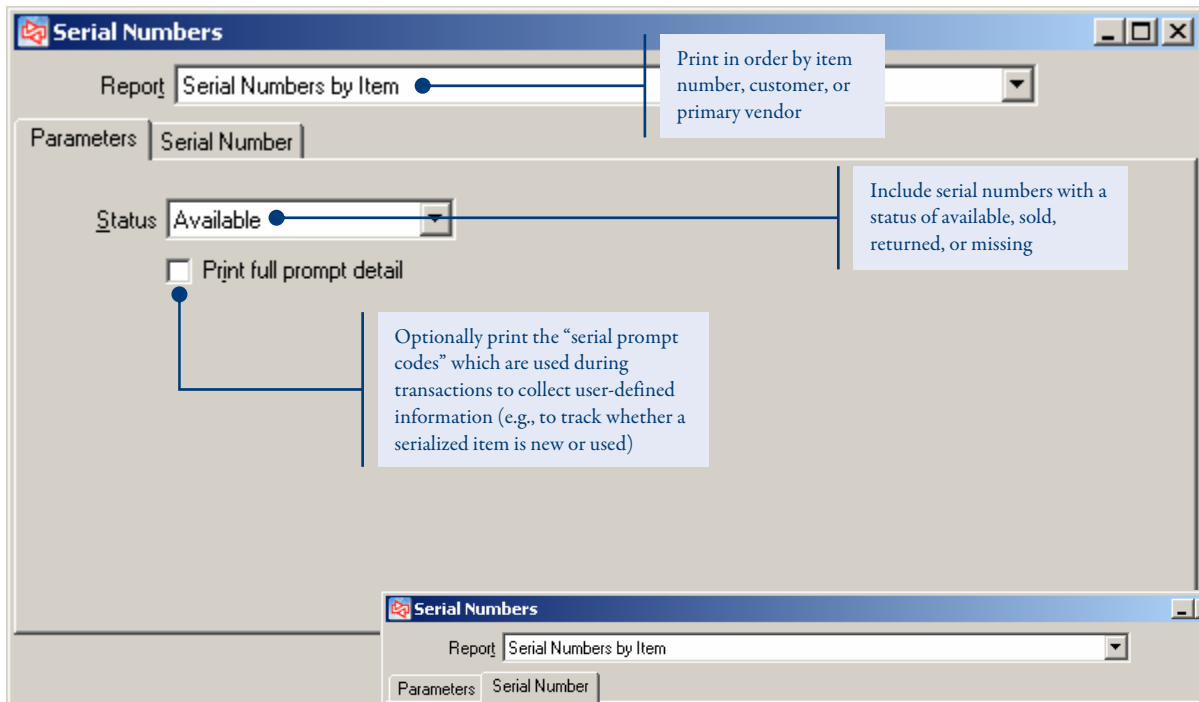
### OVERVIEW

The **Serial Numbers Report** lists the serial numbers used in your store.

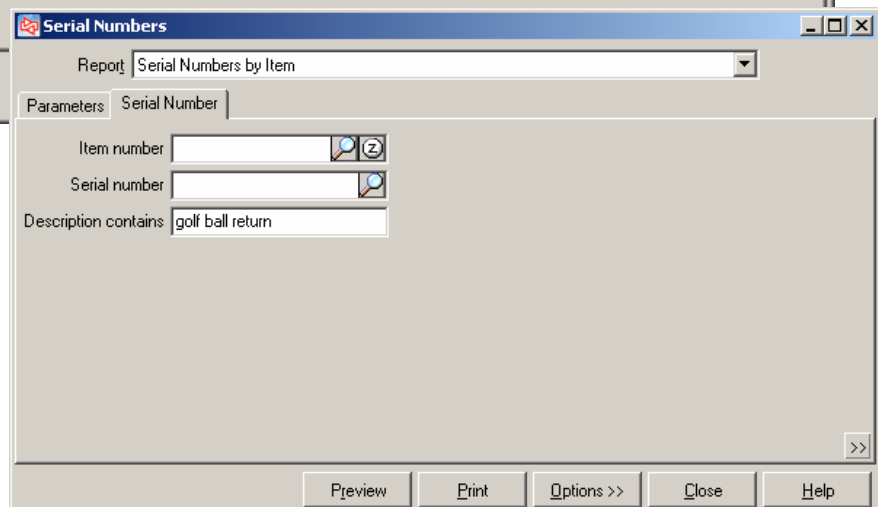
Serial number tracking provides a detailed record of each specific unit (serial number) of an inventory item. “Always serialized” items allow you to exercise tight management control over the movement of quantities for the item. “Sometimes serialized” tracking offers somewhat looser control and is useful for businesses that don't track in-stock serial numbers but want to record serial number information at the time of sale.

### REPORT PARAMETERS

Generate a list of available, sold, returned, or missing serial numbers.



Use the serial number filter to limit which items and serial numbers appear on the report.



## SAMPLE REPORTS

### Available Serial Numbers Ordered by Item Number

Date 4/10/2007 Time 1:22:21PM Page 1 of 1

Serial Numbers by Item

Status: Available  
 \* = Committed  
 \*\* = In transit

Activity codes: D=Adjustment Down, E=Return, I=Transfer In, O=Transfer Out, P=Purchasing Adjustment,  
 Q=Quick Receiving, R=Receiving, S=Sale, T=Quick Transfer, U=Adjustment Up, V=Return to  
 vendor, X=Transfer reconcile, C=Committed on Order, L=Committed on Layaway

Order by: Item #, Serial #

Item #	Serial #	Location	Recvg	Description	Age Vendor #	Cost	Prompt codes	Last activity	Event #
Ball Retum - Battery powered									
BALL-RET	800447-6652	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	800447-6653	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	800447-6654	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	800447-6655	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
BALL-RET totals:									
				4 serial numbers					
Ball Retum - PRO									
BALL-RET-PRO	11256	MAIN	05/24/2002	1,782 DUNLOP		35.0000		Q on 05/24/2002	700067
	11257	EAS T	05/24/2002	1,782 DUNLOP		35.0000		l on 03/14/2005	200005
	11258	EAS T	05/24/2002	1,782 DUNLOP		35.0000		l on 03/14/2005	200005
	* 14298	MAIN	09/30/2002	1,653 DUNLOP		35.0000		Q on 09/30/2002	700074
	* 14299	MAIN	09/30/2002	1,653 DUNLOP		35.0000		Q on 09/30/2002	700074
	900455-1006	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	900455-1007	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	900455-1008	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	900455-1009	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	900455-1010	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
	900455-1011	MAIN	04/10/2007	0 ADAMS				R on 04/10/2007	700186
BALL-RET-PRO totals:									
				11 serial numbers		175.0000			
			2 items		15 serial numbers		175.0000		

-- End of report --

### Serial Numbers Sold to a Particular Customer

Date 4/10/2007 Time 2:22:58PM Page 1 of 1

Serial Numbers by Customer

Status: Sold

Activity codes: D=Adjustment Down, E=Return, I=Transfer In, O=Transfer Out, P=Purchasing Adjustment,  
 Q=Quick Receiving, R=Receiving, S=Sale, T=Quick Transfer, U=Adjustment Up, V=Return to  
 vendor, X=Transfer reconcile, C=Committed on Order, L=Committed on Layaway

Order by: Customer #, Item #, Serial #  
 Serial Number: Item number is (exactly) BALL-RET

Item #	Serial #	Location	Recvg	Description	Age Vendor #	Cost	Prompt codes	Last activity	Event #
Ball Retum - Battery powered									
BALL-RET	24521	MAIN	05/24/2002	1,782		11.5000		S on 05/24/2002	700068
	50041-088	MAIN	04/10/2007	0		11.5000		S on 04/10/2007	
BALL-RET totals:									
				2 serial numbers		23.0000 59.98			
Customer CASH totals:									
			1 items		2 serial numbers		23.0000 59.98		

## SIX WEEK ITEM HISTORY

- Spot sales trends
- Evaluate item performance over six weeks

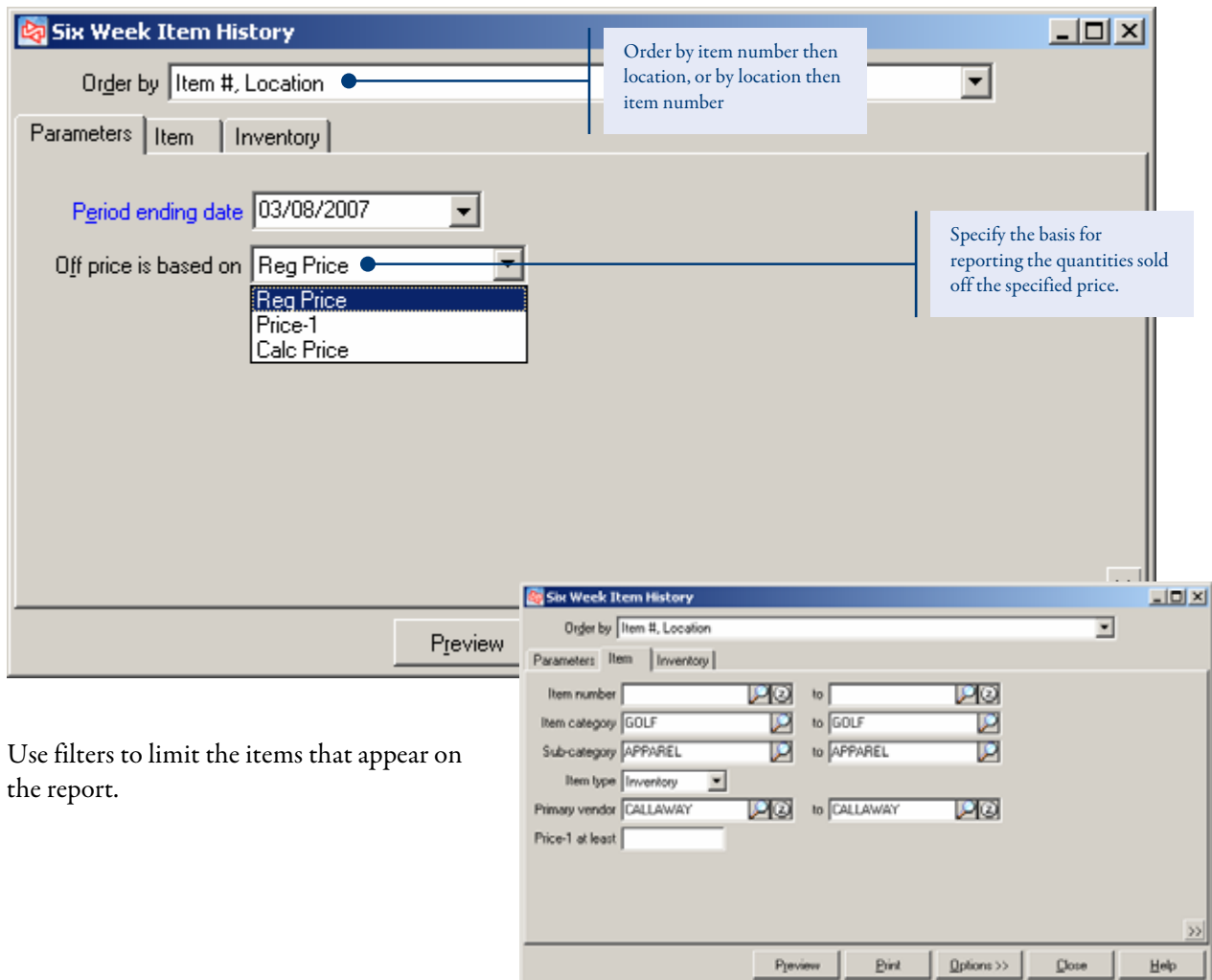
### OVERVIEW

The *Six Week Item History Report* lets you see item performance and sales trends for specific six week periods.

The report includes a useful summary of the past 26 weeks, including the date each item was first received, the quantity received, and the percentage of inventory sold during that period. Further, the report indicates the quantities sold at retail and off retail (or the basis you specify). Finally, the report indicates the current on-hand and on-order quantities, as well as the projected number of weeks of on-hand inventory, for each item.

### REPORT PARAMETERS

Specify the basis for reporting the quantities sold off the specified price.



## SAMPLE REPORT

### Six Week History Based on Regular Price

Date 3/16/2007 Time 9:11:02AM													Page 1			
Six Week Item History																
Reporting periods: Six weeks beginning 11/20/06 and ending 12/31/06 26 weeks beginning 7/3/06 and ending 12/31/06 Qty sold off price is based on Reg Price Rec'd = Qty-rec'd - RTV's + adj + xfer-in - xfer-out + xfer recon + phys count Inventory: Location is (exactly) STORE Order by: Item #, Location																
10222	Titelist DT Recycled Golf Balls				Titelist		GOLF/BALLS			7.99	62.5	7.99	62.5			
26 week receivings		Current qty		Qty sold in each of 6 weeks ending					26 week item performance							
STORE																
1st-rec'd	Rec'd	On-hand	On-order	12/3/06	12/10/06	12/17/06	12/24/06	12/31/06	Std@RegPr	Std@OffPr	% Std	Wks-OH	MMU %			
7/3/04	16	-2	30	0	1	0	0	1	2	2	24	-13.0	35.2			
10251	Bridgestone ES Golf Balls				Bridgestone		GOLF/BALLS			24.95	70.0	14.95	49.9			
26 week receivings		Current qty		Qty sold in each of 6 weeks ending					26 week item performance							
STORE																
1st-rec'd	Rec'd	On-hand	On-order	12/3/06	12/10/06	12/17/06	12/24/06	12/31/06	Std@RegPr	Std@OffPr	% Std	Wks-OH	MMU %			
7/4/04	6	0	24	0	1	1	0	0	4	1	71	0.0	38.2			
10252	Pelz Point 3 Practice Balls 36pk				Dave Pelz		GOLF/BALLS			29.97	42.0	29.97	42.0			
26 week receivings		Current qty		Qty sold in each of 6 weeks ending					26 week item performance							
STORE																
1st-rec'd	Rec'd	On-hand	On-order	12/3/06	12/10/06	12/17/06	12/24/06	12/31/06	Std@RegPr	Std@OffPr	% Std	Wks-OH	MMU %			
7/4/04	2	4	0	0	0	0	0	0	1	0	25	104.0	40.0			
10261	TaylorMade React Pro Golf Glove				TaylorMade		GOLF/GLOVE			12.99		12.99				
26 week receivings		Current qty		Qty sold in each of 6 weeks ending					26 week item performance							
STORE																
1st-rec'd	Rec'd	On-hand	On-order	12/3/06	12/10/06	12/17/06	12/24/06	12/31/06	Std@RegPr	Std@OffPr	% Std	Wks-OH	MMU %			
7/4/04	1	4	0	0	0	0	1	0	4	0	50	26.0	40.0			
10262	Tiger Shark GS-1 Speed Putter				Tiger Shark		GOLF/PUTT			59.99	40.0	59.99	40.0			
26 week receivings		Current qty		Qty sold in each of 6 weeks ending					26 week item performance							
STORE																
1st-rec'd	Rec'd	On-hand	On-order	12/3/06	12/10/06	12/17/06	12/24/06	12/31/06	Std@RegPr	Std@OffPr	% Std	Wks-OH	MMU %			
7/4/04	8	1	0	1	0	1	2	0	7	0	70	3.7	40.0			
10263	TaylorMade Old School Hat				TaylorMade		APPAR/HAT			14.99	41.0	14.99	41.0			
26 week receivings		Current qty		Qty sold in each of 6 weeks ending					26 week item performance							
STORE																
1st-rec'd	Rec'd	On-hand	On-order	12/3/06	12/10/06	12/17/06	12/24/06	12/31/06	Std@RegPr	Std@OffPr	% Std	Wks-OH	MMU %			
7/4/04	1	2	0	0	0	0	0	1	2	0	50	26.0	40.9			

## TWELVE MONTH ITEM HISTORY

- Spot sales trends
- Evaluate item performance over 12 months

### OVERVIEW

The *Twelve Month Item History Report* is designed to help buyers evaluate item performance and spot sales trends over specific twelve-month periods.

### REPORT PARAMETERS

The report indicates the quantity sold for a twelve month period as well as a useful summary of the date each item was first received, the quantity received, and the percentage of inventory sold. The report also indicates quantities sold at retail and off retail (or the basis you specify). Finally, the report indicates the current on-hand and on-order quantities for each item, as well as the projected number of weeks of on-hand inventory.

Report: Twelve Month Item History - Full

Order by: Item #, Location

Parameters: Item | Inventory

12 month reporting period ending: Month: March Year: 2007

Off price is based on: Reg Price

Item filters:

- Item number: [ ] to [ ]
- Item category: TENNIS to TENNIS
- Sub-category: BALLS to RAQT
- Item type: Inventory
- Primary vendor: NIKE to NIKE
- Price-1 at least: [ ]

Buttons: Preview, Print, Options >>, Close, Help

Use item and inventory filters to limit which items, locations, categories, etc. appear on the report.

## SAMPLE REPORTS

### Full Details

Date 3/16/2007 Time 2:47:13PM Page 1

Twelve Month Item History - Full

Reporting period: Twelve months ending Mar 31 2007  
 Qty sold off price is based on Reg Price  
 Rec'd = Qty-rec'd - RTVs + adj + xfer-in - xfer-out + xfer recon + phys count  
 Order by: Item #, Location  
 Inventory: Item number is (exactly) 10173

Item #	Description	Vendorname	Category / Subcat	Item reg pro	MU-%	Item Pro 1	MU-%					
10173	Top Flite XL Distance Golf Balls	Top Flite	GOLF/BALLS	12.99	55.0	12.99	55.0					
----- Qty sold in each of 12 months -----												
	Apr 2006	May 2006	Jun 2006	Jul 2006	Aug 2006	Sep 2006	Oct 2006	Nov 2006	Dec 2006	Jan 2007	Feb 2007	Mar 2007
DISTRIB	0	0	0	3	0	0	2	3	20	3	6	4
MALL	0	0	0	1	0	0	0	0	1	1	0	1
WEB	0	0	2	1	3	4	3	3	3	2	1	3
	0	0	2	5	3	4	5	6	24	6	7	8
10173 Key Indicators												
First-rec'd	Rec'd	Qty on hand	Qty on PO	Slid@RegPro	Slid@OffPro	Total qty slid	%-Slid	Wks OH	MMU %			
5/26/06	84	42	0	48	22	70	87.5	31.3	51.4			
Report totals ----- Qty sold in each of 12 months -----												
	Apr 2004	May 2004	Jun 2004	Jul 2004	Aug 2004	Sep 2004	Oct 2004	Nov 2004	Dec 2004	Jan 2005	Feb 2005	Mar 2005
	0	0	2	5	3	4	5	6	24	6	7	8
Report key indicators												
	Qty rec'd	Qty on hand	Qty on PO	Slid@RegPro	Slid@OffPro	Total Qty Sold	%-Slid	MMU %				
	84	42	0	48	22	70.00	87.5	51.4				

-- End of report --

### Brief Format

Date 3/16/2007 Time 3:03:09PM Page 1

Twelve Month Item History - Brief

Reporting period: Twelve months ending Mar 31 2007  
 Qty sold off price is based on Reg Price  
 Rec'd = Qty-rec'd - RTVs + adj + xfer-in - xfer-out + xfer recon + phys count  
 Order by: Item #, Location  
 Inventory: Item number is (exactly) 10173

Item #	Description	Vendorname	Category / Subcat	Item reg pro	MU-%	Item Pro 1	MU-%					
10173	Top Flite XL Distance Golf Balls	Top Flite	GOLF/BALLS	12.99	55.0	12.99	55.0					
----- Qty sold in each of 12 months -----												
	Apr 2006	May 2006	Jun 2006	Jul 2006	Aug 2006	Sep 2006	Oct 2006	Nov 2006	Dec 2006	Jan 2007	Feb 2007	Mar 2007
DISTRIB	0	0	0	3	0	0	2	3	20	3	6	4
MALL	0	0	0	1	0	0	0	0	1	1	0	0
WEB	0	0	2	1	3	4	3	3	3	2	1	3
10173 totals	0	0	2	5	3	4	5	6	24	6	7	8
Report totals ----- Qty sold in each of 12 months -----												
	Apr 2006	May 2006	Jun 2006	Jul 2006	Aug 2006	Sep 2006	Oct 2006	Nov 2006	Dec 2006	Jan 2007	Feb 2007	Mar 2007
	0	0	2	5	3	4	5	6	24	6	7	8

-- End of report --

## DASHBOARD

- Bird's eye view of entire business operation
- Graphical snapshot of Key Performance Indicators
- Effectively measure, monitor, and manage performance

### OVERVIEW

**Dashboard** is an enhanced reporting tool that provides clear and concise graphical snapshots of your entire business operation. With **Dashboard**, you can monitor Key Performance Indicators (KPIs) so you can see how your business is performing.

**Dashboard** is available beginning with V8.3.6.

### DASHBOARD VIEWS

**Dashboard** includes at-a-glance views of the following areas:

- Day
- Period
- Company
- Store
- Vendor
- Product

Dashboard's views allow you to monitor your business by the time increments that are meaningful to you—hour, day, week-to-date, period-to-date, month-to-date, or year-to-date—and compare current time periods to previous periods. View trends based on raw numbers (e.g., number of tickets, sales dollars, etc.) or by calculated numbers (e.g., profit percent, average margin, average ticket sale). You can view your entire company, a particular store, or drill down to a specific category, vendor, or item.

### SAMPLE VIEWS

#### Day View

The Day View shows daily activity for the date selected.



#### Key Performance Indicators:

- Number of tickets
- Sales dollars
- Profit amount
- Profit percent
- Average ticket amount
- Discount percent
- Average number of items per ticket
- Sales trends by hour of the day for sales dollars and number of tickets

### Period View

The Period View shows performances for the week to date, month to date, period to date, season to date, and year to date for the periods ending on the selected date.

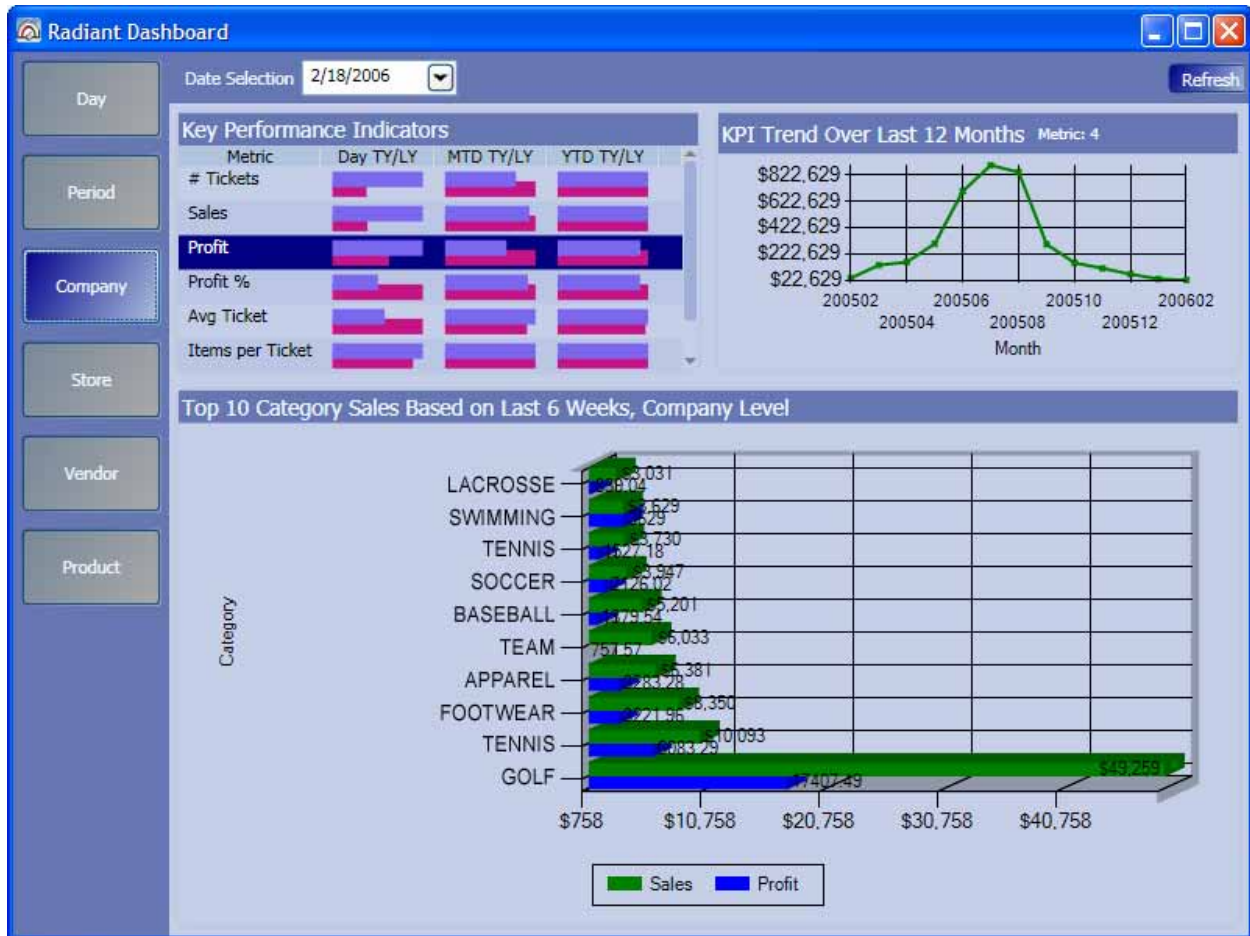


### Key Performance Indicators:

- Number of tickets
- Sales dollars
- Profit amount
- Average ticket amount
- Discount percent
- Performance by period (includes month-to-date, season-to-date, and year-to-date comparisons of sales dollars, number of tickets, and profit for this year and last year)
- Trend graph includes the sales dollars and profit amount for the selected period of time

### Company View

The Company View shows sales and profit for the entire company over a 12 month period.

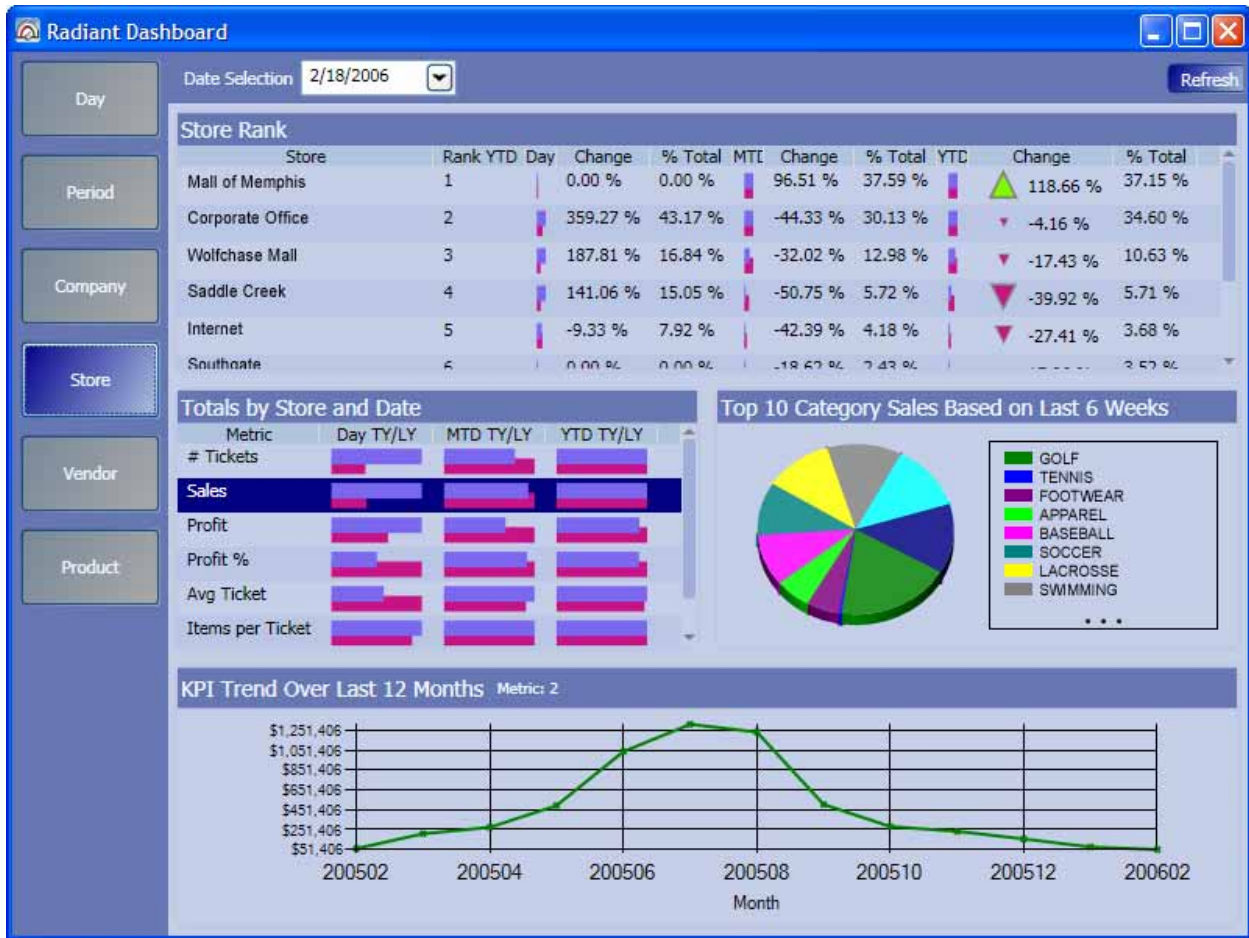


#### Key Performance Indicators:

- Day, month-to-date, and year-to-date comparisons for this year and last year for the number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket
- 12 month trend graph for each KPI (number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket)
- Top ten categories based on sales dollars and profit for the last six weeks

### Store View

The Store View compares sales and profit performance at the store level.

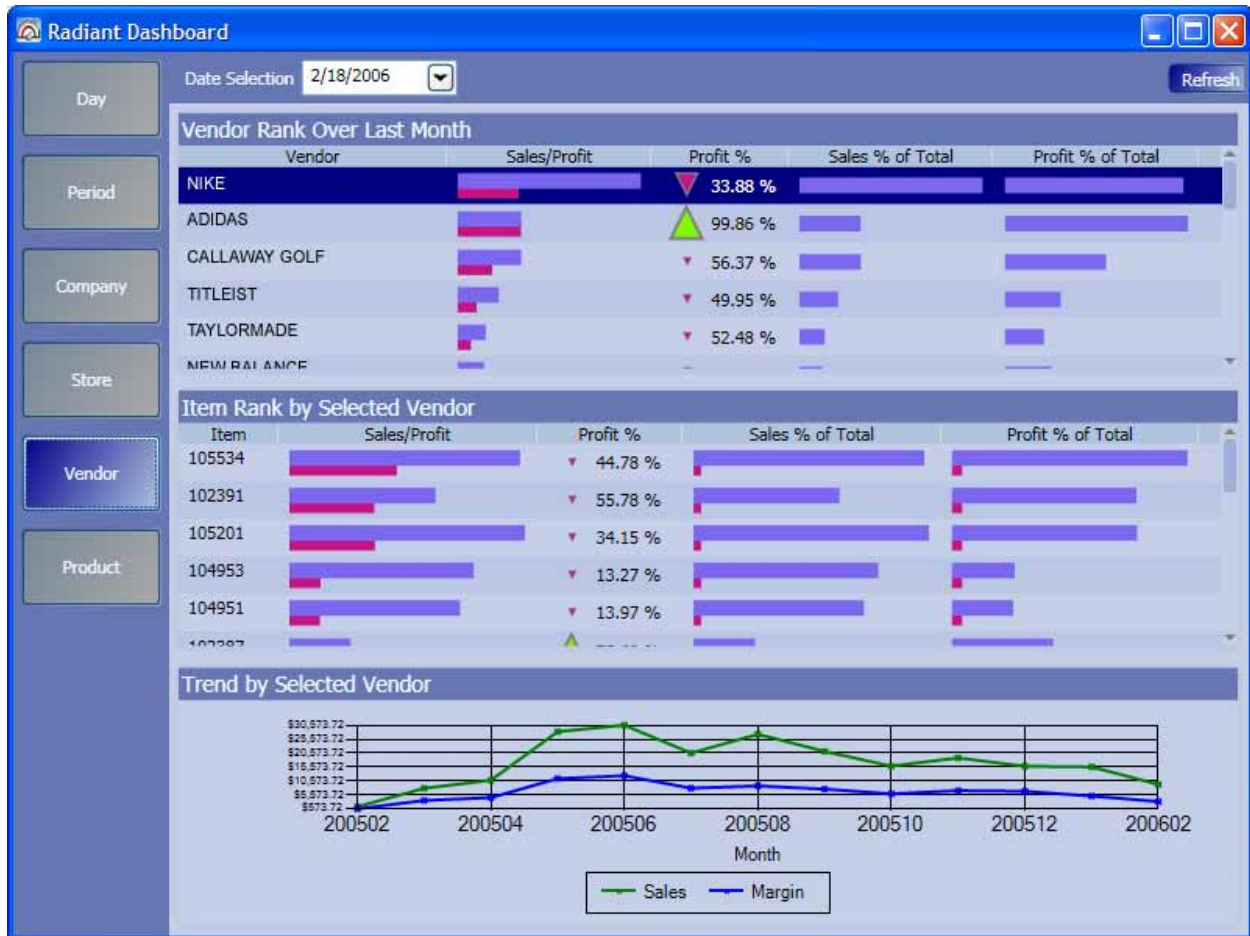


### Key Performance Indicators:

- Store rankings for the day, month, and year based on how it changed compared to the previous year
- For each store, drill down to view the number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket for this year and last year
- Top ten categories for each store for the last six weeks
- 12 month trend graph for each KPI (number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket)

### Vendor View

The Vendor View compares vendor performance and graphs sales trends.

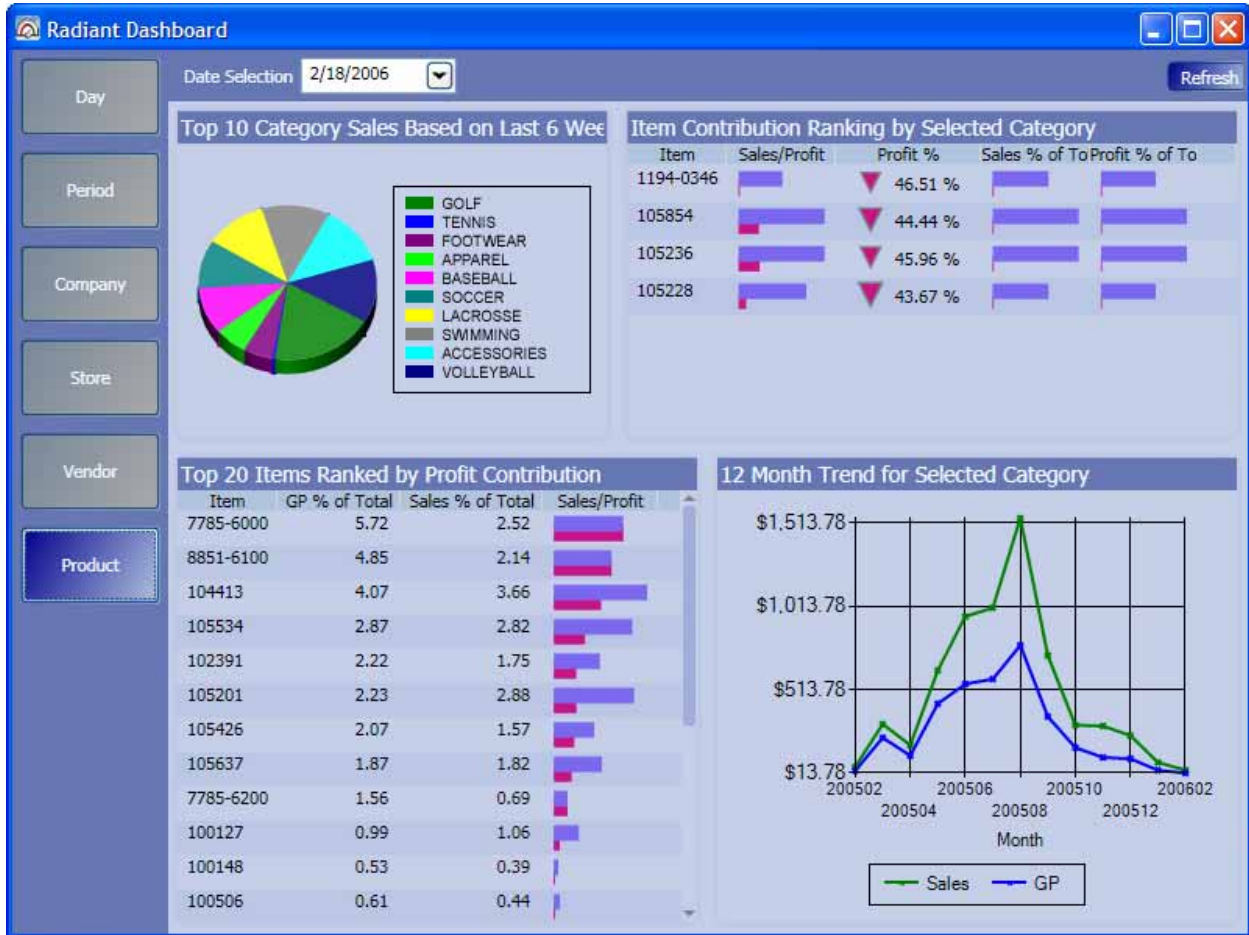


### Key Performance Indicators:

- Vendor rankings by sales and profit for the last month
- For each vendor, drill down to view that vendor's best selling and most profitable items
- 12 month trend graph based on sales and profit margin

### Product View

The Product View includes the best selling items and how they contribute to gross profits.



### Key Performance Indicators:

- Top ten categories for each store for the last six weeks
- Individual items that contributed to the top ten categories
- Top 20 items ranked by profit contribution
- 12 month trend graph based on sales and gross profit