

Sales Analysis Reports-Examples

File these instructions in the MACS Software User's Manual

Requirements

Operating System: Any
 MACS Version: 5.0 or higher

Situation

Sales analysis reports from MACS play an important role in helping you analyze and manage your agency. The unique report generator prints information according to your specific needs. Nine sample reports on the following pages illustrate a variety of sales analysis reporting, all derived from the single entry of data using the MACS Basic System.

Manufacturer Sales Analysis

Format G2, Sort MØ

"What percentage of my agency's commission income does each manufacturer contribute?"

G2 /MØ SA\11.1		ANY SALES AGENCY, INC.					PAGE 1			
11/15/13		S/A REPORT: MFG					SALES 10/13			
MANUFACTURER	LAST* ACTVY	YEAR-TO-DATE** CURR	COMPARISON * LAST	\$	%	TOTAL ** LAST YR	COMMISSION Y-T-D	******** LYTOT	YTD	LYT
LEE JACOB MFG	10/13	887159	752740	134419	+18%	910039	59511	46240	27	19
H. F. KRAUSE	10/13	542443	350350	192093	+55%	415831	33510	24430	15	10
MNC COMPANY	10/13	801641	684284	117357	+17%	926747	29644	52173	14	22
APCAL ALLOY	10/13	281333	134833	146500	+109%	153785	18151	8220	8	3
ISLE REST. CO.	10/13	143207	97652	45555	+47%	119738	12666	7829	6	3
SIMPLEX MFG	9/13	484283	84283			11851			5	0
B.C. INDUST.	10/13	79468	119873	40405-	-34%	157278	7664	6186	4	3
SIMPSON PART	10/13	68694	26145	42549	+163%	34577	7103	2023	3	1
ROLLINS/COMP.	10/13	103385	50251	53134	+106%	67717	5169	3262	2	1
ROLLINS/PARTS	10/13	131331	107661	23670	+22%	129751	4548	7717	2	3
SACLIA SUPPLY	10/13	38678	94909	56231-	-59%	116017	1962	5163	1	2
ROLLINS/CAPITA	10/13	23851	69433	45582-	-66%	78704	1093	5193	1	2
S P & P INC.	12/12<		1108542	1108542	--100%	1188794		51376	0	22
*REPORT TOTAL*10/13		4088738	3810673	278065	+7%	4580810	218118	238562	100	100
(DESC COMM-THISYTD)										

Customer Sales Analysis

Format G1, Sort C1

"Who are my largest customers, and what percent of the agency volume does each generate?"

G1 /C1 SA\11.1		Any Sales Agency, Inc.						PAGE 1		
11/15/13		S/A REPORT: Cst						Sales 10/13		
SMN	CUSTOMER	LAST ACTVY	CURR MONTH	*YEAR-TO-DATE CURR	*COMPARISON* LAST	TOTAL \$	%	LAST YR	%/TOT YTD	LYT
4	Amer Air Prod Toledo OH	10/13	65163	488480	362137	126343	+35%	520743	12	11
4	Akland Ft Wayne IN	10/13	527	251033	405958	154925-	-38%	452751	6	10
2	Adel's/Cinci Cinci, OH	10/13	14784	185548	237671	52123-	-22%	278975	5	6
1	A&G Metals Co Cleve OH	10/13	30932	158709	207107	48398-	-23%	243561	4	5
4	Adel's/Toledo Toledo, Oh	10/13	81832	414916	157828	257088	+163%	197230	10	4
2	Antenna Dev S Bend IN	10/13	5476	87368	161709	74341-	-46%	194486	2	4
1	Am Distri Cleveland OH	10/13	5970	101344	154842	53498-	-35%	193715	2	4
2	Aero Cool S Bend IN	10/13	13604	102983	132831	29848-	-22%	170131	3	4
3	Achin Weld Co Flint MI	10/13	16225	197507	125965	71542	+57%	154475	5	3
4	Am Lab Indianapolis In	10/13	34134	237017	97261	139756	+144%	143940	6	3
1	Al Mold Spci Dayton OH	1/12<			1412731	41273-	-100%	141273	0	3
2	Abb Hlth Prod Louisv KY	10/13	18560	243793	114155	129638	+114%	126615	6	3
3	Al Fit Mfg Kalamazoo MI	10/13	17539	132665	99107	33558	+34%	122758	3	3
2	Baker Tub Louisville KY	10/13	9772	106542	10068	5860	+6%	119315	3	3
2	Aiken SandingAshland KY	10/13	1105	59750	105171	45421-	-43%	111710	1	2
3	Abra Tool Co Detroit MI	10/13	19382	97291	107562	10271-	-10%	99568	2	2
3	Am Indust Detroit MI	10/13	3154	15023	67596	47427	+70%	88054	3	2
3	Air Plate Co Lansing MI	9/13	18020	78856		60836-	-77%	87548	0	2
1	Albright Ctrl Akron OH	10/13	8825	126598	65876	60722	+92%	85142	3	2
1	Atlas Cast Co Akron OH	10/13	11511	67190	72032	4842-	-7%	84268	2	2
1	Abbey Elect Co.Cleve Oh	10/13	3991	80920	63746	17174	+27%	84232	2	2
REPORT TOTAL		10/13	362486	3272697	3059365	2133	+7%	3700490	80	81
(Desc Sales-LastYrTtl		, range 80000 :1000000)								

Salesman Sales Analysis

Format G2, Sort S0

"What volume does each salesperson generate, and what percent of the agency total is it?"

G2 /S0 SA\11.1		Any Sales Agency, Inc.						PAGE 1			
11/15/13		S/A REPORT: Smn						Sales 10/13			
SALESMAN	LAST ACTVY	*YEAR-TO-DATE CURR	**COMPARISON* LAST	TOTAL \$	** COMMISSION** Y-T-D	LYTOT	***%* YTD	LYT			
Rick White	10/13	155764	1253299	304347	+24%	1596913	70545	78507	32	33	
Jim Black	10/13	988589	1011953	23364-	-2%	1177014	47987	56534	22	24	
Bill Grey	10/13	774194	644565	129629	+20%	744109	48466	47711	22	20	
Tom Green	10/13	768309	900856	132547-	-15%	1062774	51120	55810	23	23	
REPORT TOTAL		10/13	4088738	3810673	278065	+7%	4580810	218118	238562	100	100
(Desc Sales-ThisYTD)									

Geographic Sales Analysis

Format G1, Sort LØ

"When it's time to add a new salesperson, how should I redefine territories?"

G1 /L0 SA\11.1 11/15/13		Any Sales Agency, Inc. S/A REPORT: State / Reg					PAGE 1 Sales 10/13		
STATE REGION	LAST ACTVY	CURR MONTH	*YEAR-TO-DATE CURR	LAST	* COMPARISON \$	%	* TOTAL LAST YR	%/TOT YTD	LYT
INDIANA									
IN, Indianapolis	10/13	41329	285793	163854	121939	+74%	233281	7	5
IN, Gary-Hammond	8/13		2754	40158	37404-	-93%	43920	0	1
IN, So Bend-Elkha	10/13	19080	190351	294540	104189-	-35%	364617	5	8
IN, Fort Wayne	10/13	5211	289954	438918	148964-	-34%	490378	7	11
IN, Evansville	10/13	8260	60146	90404	30258-	-33%	111361	1	2
* Total State *IN	10/13	73880	828998	1027874	198876-	-19%	1243557	20	27
KENTUCKY									
KY, Louisville	10/13	38648	423215	264671	158544	+60%	303432	10	7
KY, Ashland	10/13	1105	59927	105254	45327-	-43%	111849	1	2
KY, Owensboro	8/13		11481	59081	47600-	-81%	59081	0	1
* Total State *KY*	10/13	39753	494623	429006	65617	+15%	474362	12	10
MICHIGAN									
MI, Detroit	10/13	22536	212330	175158	37172	+21%	187622	5	4
MI, Flint	10/13	24863	245523	157304	88219	+56%	193066	6	4
MI, Grand Rapids	10/13	9801	108827	49966	58861	+118%	64970	3	1
MI, Lansing	10/13	407	33752	106332	72580-	-68%	124585	1	3
MI, Kalamazoo	10/13	17539	172038	155805	16233	+10%	173866	4	4
* Total State *MI*	10/13	75146	772470	644565	127905	+20%	744109	19	16
OHIO									
OH, Cleveland	10/13	40893	340973	425695	84722-	-20%	521508	8	11
OH, Cincinnati	10/13	22164	303615	288407	15208	+5%	338035	7	7
OH, Columbus	10/13	7824	116799	95127	21672	+23%	107369	3	2
OH, Dayton-Springf	10/13	6047	116749	242126	125377-	-52%	264487	3	6
OH, Akron/Canton	10/13	20336	193788	137908	55880	+41%	169410	5	4
OH, Toledo	10/13	147483	920723	519965	400758	+77%	717973	23	16
* Total State *OH*	10/13	244747	1992647	1709228	283419	+17%	2118782	49	46
REPORT TOTAL	10/13	433526	4088738	3810673	278065	+7%	4580810	100	100

Manufacturer by Salesman Sales Analysis

Format Z, Sort M2

"How well does each salesperson sell a particular manufacturer?"

Z /M2 SA\11.1		Any Sales Agency, Inc.							PAGE 1	
11/15/13		S/A REPORT: Mfg / Smn *LJM* Lee Jacob Mfg Sales							10/13	
SALESMAN	LAST	CURR	YEAR-TO-DATE			THIS-VS-LAST		THIS-VS-PREV		TOT
	ACTVY	MONTH	THIS-YR	LAST-YR	PREV-YR	\$	%	\$	%	LAST YR
Tom Green	10/13	17115	214537	163106	125835	51431	+32%	88702	+70%	208135
Jim Black	10/13	31984	303784	340300	268757	36516-	-11%	35027	+13%	394120
Bill Grey	10/13	19034	267515	189703	146075	77812	+41%	121440	+83%	225273
Rick White	10/13	11858	101323	59631	45675	41692	+70%	55648	+122%	82511
*Tot Mfg*LJM*	10/13	79991	887159	752740	586342	134419	+18%	300817	+51%	910039

Manufacturer by Salesman and Customer Sales Analysis

Format Z, Sort M1

"Who are the customers in a territory that buy from a particular manufacturer?"

Z /M1 SA\11.1		Any Sales Agency, Inc.							PAGE 1	
11/15/13		S/A REPORT: Mfg / Smn / Cst *LJM* Lee Jacob Mfg Sales							10/13	
SALESMAN CUSTOMER	LAST	CURR	YEAR - TO - DATE			THIS-VS-LAST		THIS-VS-PREV		TOT
	ACTVY	MON	THIS-YR	LAST-YR	PREV-YR	\$	%	\$	%	LAST YR
Jim Black										
Adel's/ Cincin	10/13	11471	166203	222819	177454	56616-	-25%	11251-	-6%	257314
Am Inst Louisv	10/13	10316	66400	49834	38619	16566	+33%	27781	+72%	57502
Aiken Ashlan	10/13	1105	20389	27583	21550	7194-	-26%	1161-	-5%	31408
AbbProd Louisv	10/13	4147	25366	18488	14381	6878	+37%	10985	+76%	23840
Alc EntIOwensb	8/13		11481	11960	9070	479-	-4%	2411	+27%	11960
Am Tool Cincin	10/13	168	12168	9382	7496	2786	+30%	4672	+62%	11862
Ant Dev South	7/12<			234	187	234--	-100%	187--	-100%	234
Acme Sign Cin	10/13*	1777	1777			1777		1777		
*tot Slsmn*2	10/13	31984	303784	340300	268757	36516-	-11%	35027	+13	394120
(Desc Sales-LastYrTtl)										

Manufacturer's Fiscal Year Sales Analysis

Format J, Sort M3

"Using the manufacturer's fiscal year, how is our performance and who are the top customers?"

J, /M3 SA\11.1		Any Sales Agency, Inc.						PAGE 1	
11/15/13		S/A REPORT: Mfg / Cst *LJM* Lee Jacob Mfg Sales 10/13						As of 9/13 Mth YE 9	
SMN	CUSTOMER	LAST ACTVY	CURR * MONTH	YEAR-TO-DATE * CURR	YEAR-TO-DATE * LAST	COMPARISON \$	COMPARISON %	TOTAL * LAST YR	
2	Adel's/Cinci Cinci	10/13	17,660	200,376	249,135	48,759-	-20%	249,135	
3	Ac Weld Co Flint MI	10/13	19,062	200,665	95,666	104,999	+110%	95,666	
1	Agora Met Columb OH	10/13	4,922	71,683	60,827	10,856	+18%	60,827	
2	Am Inst Louisville	10/13	5,332	69,952	51,836	18,116	+35%	51,836	
1	Adel's/ Dayton, OH	10/13	12,138	77,494	46,786	30,708	+66%	46,786	
4	Babs Tool Evnsville	9/13	6,780	44,765	40,417	4,348	+11%	40,417	
3	AviaTech Kalamazoo M	9/13	1,275	31,582	36,019	4,437-	-12%	36,019	
3	Abras Tool Detroit MI	9/13	5,200	31,076	33,255	2,179-	-7%	33,255	
2	Aiken Sand Ashland KY	10/13	1,895	25,659	29,315	3,656-	-12%	29,315	
1	Atlas Cast Co Akron	9/13	4,248	57,868	29,242	28,626	+98%	29,242	
1	Apex Sheet Colum OH	10/13		31,762	26,103	5,659	+22%	26,103	
2	Antenna Deve S Bend	7/12<			250	250-	-100%	250	
4	Alrt Al Dsgn Evanvil	4/13<		415	240	175	+73%	240	
3	Air Pl Co Lansing MI	3/12<			29	29-	-100%	29	
4	Baka Steel Co Toledo	10/13		1,281		1,281			
* Total Mfg *LJM* 10/13			94,606	1,050,069	818,490	231,579	+28%	818,490	
(Desc Sales-LastYrTtl)									

Customer by Manufacturer Sales Analysis

Format A, Sort S2

"Can I give my salespeople a simple report showing a particular customer's sales for each manufacturer?"

A /S2 SA\11.1		Any Sales Agency, Inc.						PAGE 1			
11/15/13		S/A REPORT: Smn / Cst / Mfg * 2* Jim Black Sales 10/13									
CUSTOMER	LAST	**** MONTHLY SALES ****	*YEAR-TO-DATE*	COMPARISON	TOTAL						
MANUFACTURER	ACTVY	THIS MO	CUR MO	CUR-1	CUR-2	CURR	LAST	\$	%	LST YR	
Adel's Dist / Cinci Cincinnati, OH	**Mr. Wm Shelton P O Box 9812	**** C*B *****OH102*****Fax:513-442-8876 17 Alpha Drive 45122-1234 513-442-9600 General Mgr: John Ballanger x613 (Sue) W/H Mgr: Fred Shelton x642 (Ann) Bill's Secretary: Ellen Sullivan x602 Bill's Wife: Lindsey; Kids: Robin, Katie ORDERS: (800)321-1788									
Isle Restor Co	10/09<					887		887-	-100%	459	
MNC Company	10/13	810		540		8303	3004	5299	+176%	248	
Simpso Part Su	10/13	45	2165	1300	66	10221	10767	546-	-5%	12711	
*Ttl Cust *ADED00CI*		10/13	2838	14784	18960	17816	185548	237671	52123-	-22%	278975

Customer by Manufacturer 24 Month Sales Analysis

Format 24A, Sort S2

"Will I be able to give my salespeople a report that shows monthly sales for each manufacturer and customer?"

24A/S2 SA\11.1	MACS Development												PAGE	1
10/15/2013 13:27 T0	24	MoHst:	Smn / Cst / Mfg	Cst* 2* Jim Black					Sales	10/2013				
CUSTOMER *****	M O N T H L Y S A L E S *****												YTD/	
MANUFACT	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	
Adel's Dist / Cinci	**Mr. Wm Shelton**** C * B *****OH102***** Fax: 513-442-8876 *****													
Cincinnati, OH	P O Box 9812		717 Alpha Drive			45122-1234		513-442-9600						
	Gen Mgr: John Ballanger x613 (Sue)													
	W/H Mgr: Fred Shelton x642 (Ann)													
	Bill's Secty: Ellen Sullivan x602													
	Bill's Wife:Lindsey; Kids:Robin, Katie													
	FAX: 513-472-9482 ORDERS: 800-321-1788													
Apcal Alloy Company														
2013	0	0	0	0	483	0	0	0	0	338			821	
2012	26	21	21	21	21	21	21	21	21	0	0	8049	8243	
2011									415	0	4829	4980		
Isle Restoring Co.														
2012	32	24	24	24	24	24	24	24	24	663	0	428-	459	
2011										26	0	256-	313	
Simpso Part Supply														
2013	308	1420	38	2067	1458	77	1322	66	1300	2165			10221	
2012	434	1765	420	1766	1765	421	16	420	16	4	1376	568	12711	
2011								806	825	340	9674			
*Ttl Cust *ADED00CI*														
2013	21022	19569	19973	19912	22444	13411	17657	17816	18960	14784			185548	
2012	30568	19728	19694	31234	25830	19124	24170	23787	30015	13518	13102	282022	3214139	
2011	0	0	0	0	0	0	0	0	0	17820	7983	17038	213853	



Could you restore from a back-up today if you had to?

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