salesFLEX™ for BusinessVision®

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salesFLEX™ Overview

salesFLEX enables you to produce powerful, dynamic sales reports with ease. *salesFLEX* is easy to install and set up, and offers full support for multi-user environments. (*salesFLEX* is licensed on a per workstation basis.)

- Generate reports by customer, product, city, province/state, area code, ship-to, product code, salesperson, and more
- Analyse data by any period - day, week, month, quarter, year, year-to-date or more
- Display up to twelve date periods per report, for a comprehensive comparative analysis
- Examine data by sales dollar amount, shipped quantity, gross profit or cost amount
- Run Detail Reports using two criteria, such as customer and product, or territory and product
- Top/Bottom N capabilities (such as Top 10 customers)
- Numerous Report Combinations with Powerful Filters
- Save commonly used report options and criteria as report templates
- Multiple Currency supported

salesFLEX Options

The window is divided into two main sections - Report Format and Filters. The Report Format section enables you to easily select the type of report you wish to produce from the available drop-down lists. The optional Filters section enables you to define the report further by specifying additional criteria.

Report Format

Date Range

Enter the start and end dates for the report. Either enter the dates directly, or click the down arrows to invoke the calendar.

Report Type

Two report formats are available: Summary or Detail. The Summary report provides a summary report based on the "Report by" criteria. The Detail report provides a detail report based on the “Report By” and “Then By” criterion.

Report By

Specify the "Report By" criteria. Available options are:

- Customer Name
- Customer Number
- Part Description
- Part Number
- Product Code
- Territory
- Salesperson
- Warehouse
- City
- State/Province
- Country
- Area Code
- Ship-to
- Ship-to Name
- Ship-to City
- Ship-to State/Province
- Ship-to Country
- Ship-to Area Code

Then By

Specify the secondary criteria for the Detail Report. Available options are:

- Customer Name
- Customer Number
- Part Description
- Part Number
- Product Code
- Territory
- Salesperson
- Warehouse
- City
- State/Province
- Country
- Area Code
- Ship-to
- Ship-to Name
- Ship-to City
- Ship-to State/Province
- Ship-to Country
- Ship-to Area Code

Show Me

Specify the "Show Me" criteria. Available options are:

- Sales (sales less discounts)
- Quantity (quantity shipped)
- Gross Profit (sales less cost)
- Cost

Analyse By

Specify the comparative analysis required. Available options are:

- Monthly Comparison – rolling month totals
- Quarterly Comparison – rolling quarterly totals
- Weekly Comparison – rolling weekly totals
- Yearly Comparison – rolling yearly totals
- Daily Comparison – rolling daily totals
- Monthly Year over Year – specific month totals by year (e.g. May 2001, May 2002, May 2003)
- Quarterly Year over Year – specific quarterly totals by year (e.g. Jan-Mar 2001, Jan-Mar 2002)
- Month Year over Year – specific six-month totals by year (e.g. Jan-Jun 2001, Jan-Jun 2002)
- Month Year over Year – specific nine-month totals by year (e.g. Jan-Sep 2001, Jan-Sep 2002)
- YTD Year over Year – Specific year-to-date totals by year (e.g. Jan 1-Apr 15 2001, Jan 1-Apr 15 2002)
- 4 Weeks Comparison – rolling four weeks totals

Calculate Costs On

Specify the method for calculating costs. Available options are:

- Current Cost
- Average Cost

Top / Bottom N

Specify the required ranking criteria. Available options are:

• All - displays all records in descending order
• Top N - displays the first N records in descending order
• Bottom N - displays the last N records in ascending order

% Calculation

Specify the percentage calculation. Available options are:

• Gross Profit – Available if “Sales" is selected as the "Show Me” criteria
• Percentage of - based on the "Show Me" criteria
• None – Suppress percentage calculation on report

Round to $

Specify the rounding criteria. Available options are:

• Yes - round to the nearest dollar
• No - no rounding

Multi-Currency

(Only available on systems with the optional BusinessVision Multiple Currency Manager installed)

Specify the currencies to display and how the values are displayed. Available options are:

- All Currencies in foreign
- All Currencies in base
- One Currency (optional lookup window will appear allowing you to select the applicable currency code)

Filters

Field

Specify the required Field filter. Available options are:

• Customer Name
• Customer Number
• Part Description
• Part Number
• Product Code
• Territory
• Salesperson
• Warehouse
• City
• State/province
• Zip/Postal Code
• Country
• Area Code
• Invoice Number
• Order Number
• Reference Number
• Customer PO Number
• Ship-to
• Ship-to Name
• Ship-to City
• Ship-to State /Province
• Ship-to Zip/Postal Code
• Ship-to Country
• Ship-to Area Code

Operator

Specify the operator. Available options are:

- = - is equal to
- <> - is not equal to
- >= - is greater than, or equal to
- <= - is less than, or equal to
- is between - specify the range in the Value fields)
- is not between - specify the range in the Value fields)
- is like - '*' and '?' can be used as wildcards in the Value fields
- is not like - '*' and '?' can be used as wildcards in the Value fields

Value

Enter the required value(s) or click the Browse icon to select from the browse window.

And/Or

The And/Or fields enable you to specify up to two additional filter criterion, further defining your report.

Report Templates

salesFLEX includes the option to save commonly-used report options and criteria as templates, enabling the same reports to be re-run as required.

Saving a template

After defining your report options and criteria, click the Save icon (or File->Save on the Main Menu). You will be prompted for the location and filename of the template.

Opening a previously saved template

Click the Open Report Template icon (or File->Open on the Main Menu). You will be prompted for the location and filename of the report template you wish to open.

Purchasing *salesFLEX*

Initially, *salesFLEX* can be run in "trial" mode for a period of fifteen days. To purchase *salesFLEX*, follow the instructions below to receive a License Key.

Logon to *salesFLEX* and click the Purchase button on the Trial Status screen. Select the company from the Company Selection List and enter your User Name and Password. Click Print. Complete the printed Registration Form, with payment method, and fax to Gemini Logic Inc. at 905-625-9644. Your License Key will be e-mailed/faxed to you within two business days.

Entering Your License Key

Logon to *salesFLEX*, and click the License Key button. Enter the Registered Name and License Key that was provided to you, and click OK. (Note that this information is case-sensitive and should be entered exactly as detailed.) This completes the registration process.

Transferring Your License to Another Workstation

salesFLEX is licensed on a per workstation basis. Should you need to transfer an existing license to a new workstation, follow the steps below. Note that once these steps are completed, *salesFLEX* will be disabled on the original workstation.

1. Go to www.geminilogic.com and download *salesFLEX* to the new workstation.

2. Launch *salesFLEX* and note down the new product Registration Number from the Trial Status screen or print the registration form.

3. On the workstation where *salesFLEX* was originally registered, go to a Windows command line prompt: Start→Run→Cmd, then click OK.

4. Change directory to the folder where salesFLEX was installed (e.g. CD C:\programfiles\geminilogic\salesFLEX).

5. Type `salesFLEX /TRANSFER XXXX-XXXX-XX` (where XXXX-XXXX-XX is the Registration Number noted in Step 2 above).

6. A file called "TRANSFER.TXT" is written to the original program directory, and NotePad displays the Registered Name and License Key that can be used to license the new workstation.

7. Launch *salesFLEX* on the new workstation, click the License Key button, and enter the Registered Name and License Key. Click OK. This completes the license transfer process.

For assistance on any registration or licensing issue, please call us at 905-625-7212.

System Requirements

- BusinessVision Limited, Small Business, Standard or Client-Server SQL Edition, Version 7 or higher
- Windows 2000 or Windows XP operating system
- 20 MB of free disk space