SMP User Manual

Sales, Marketing and Information Services

Product Information—www.gosmp.com
Tutorial Videos & Training—www.gosmp.com
Customer Support—949-258-0410 or support@gosmp.com

Advanced Reporting

Overview

The software engineers at SMP have designed an innovative way to write customized reports using the same easy-to-use framework found within the rest of the Sales Management Plus application. Advanced Reporting pulls all the raw data passed to us each month in your POS and Customer Master files and allows users to create their own reports. SMP has added the ability to filter those reports and run reports against a specific Customer List.

Opening Advanced Reporting

Click on the “Advanced Reporting” Navigation button

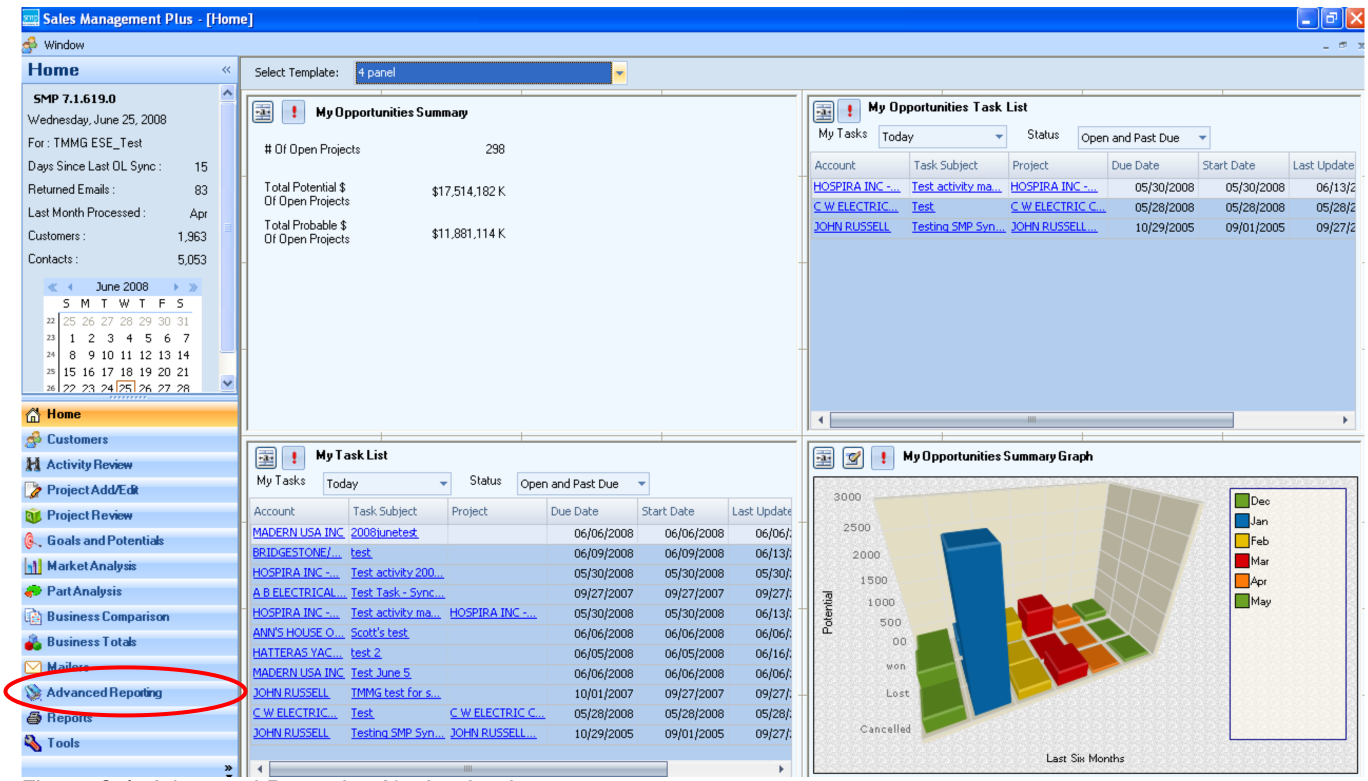

Figure 0-1: Advanced Reporting Navigation button

Create New Report

1. Select “Create New”
2. Select Report Type – “Personal” or “Shared”
3. Enter the name in the “Report Name” field
4. Click Next

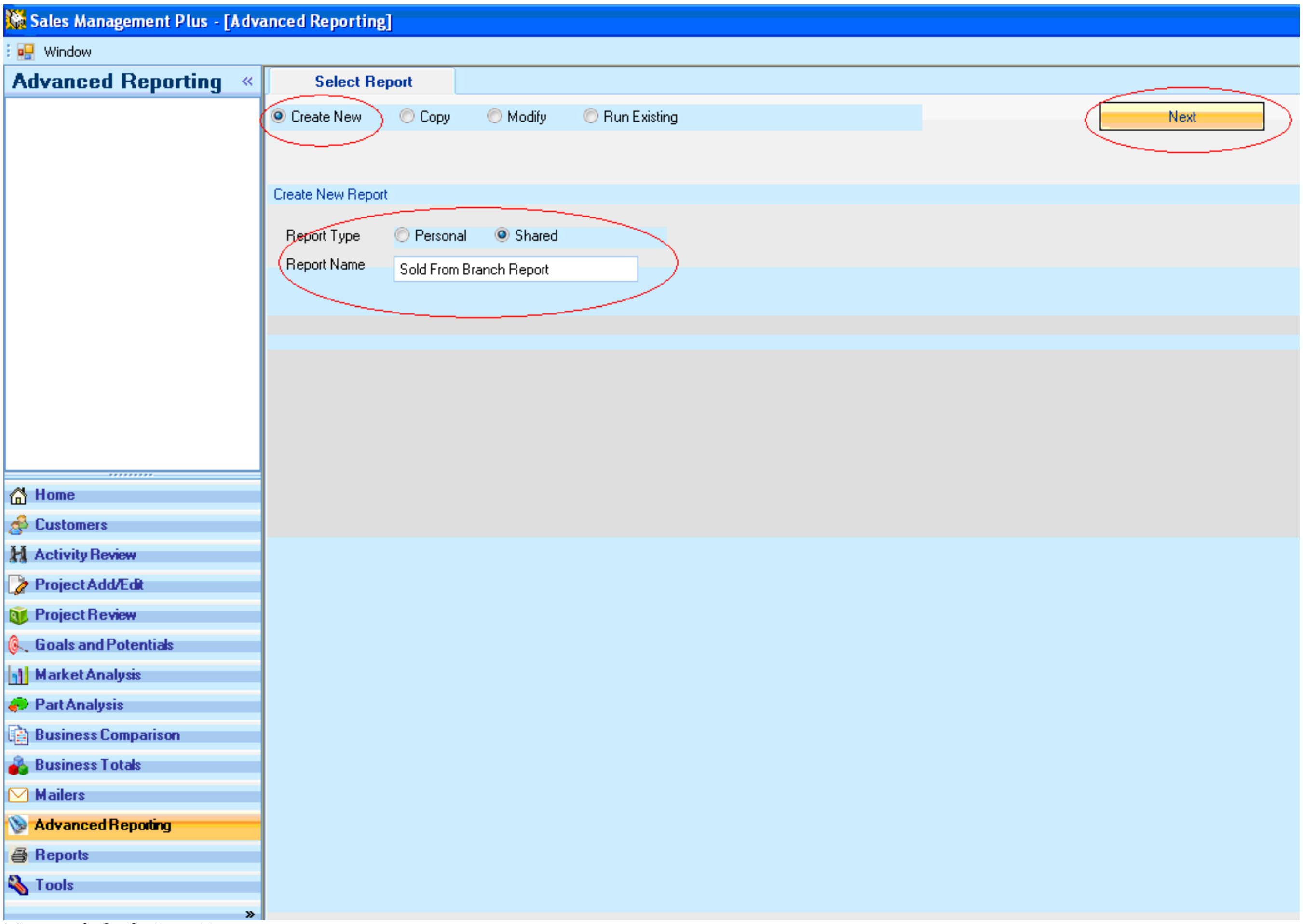

Figure 0-2: Select Report

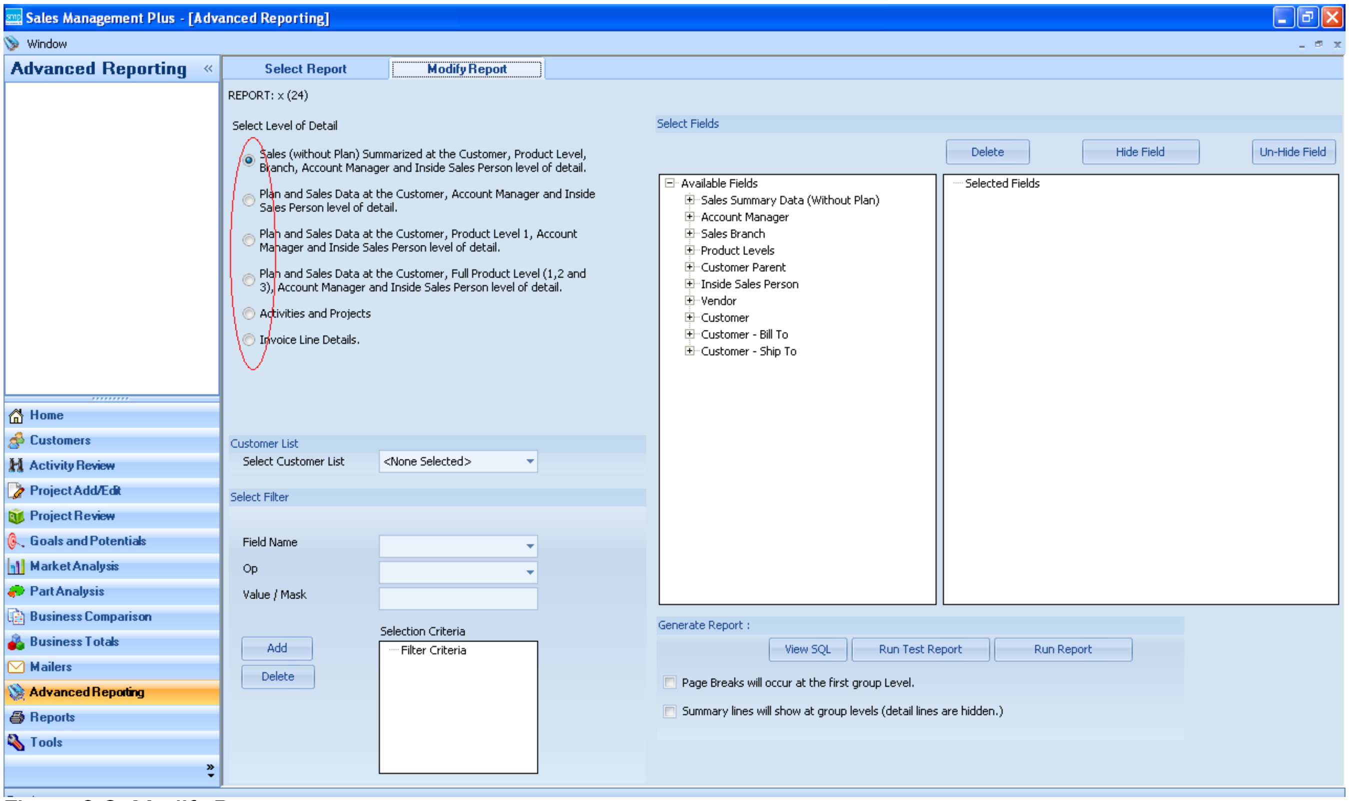

Figure 0-3: Modify Report

Modify New Report

Users will make their selections from 4 parts of this form.

1. First: “Select Level of Detail”
    a. The levels of detail have been set up in the order you should attempt to obtain, from the most general to the most specific, in terms of available data.
    b. First, attempt to use the canned reports within the main framework of SMP to produce the desired information.
    c. Second, attempt to use the summarized sales detail
    d. Third, attempt to use the plan detail
    e. Fourth, attempt to use activities and project detail
    f. Finally, attempt to use invoice detail

2. Second: “Select Fields”
    a. Expand each of the available fields and select the report criteria
    b. Once the available field is selected, users have the option to choose the “Hide Field” function. This option is helpful because the field will not show up in the report; however, users can still apply the field as a filter.
    c. If you inadvertently select a field you would like to remove, use the “Delete” button to remove it.

Figure 0-4: Delete, Hide Field, Un-Hide Field

d. Users MUST include the Customer ID ("Cust ID" found under the "Customer" available field tree) if they have selected "Customer Name" because that customer name may be duplicated in Sales Management Plus. Since Sales Management Plus is a *Customer Centric* database, adding this field will ensure the report runs correctly. Users can hide this field if they do not want to see the data as part of their report in Excel.

e. Drag and drop from the "Available Fields" column to the "Selected Fields" column.

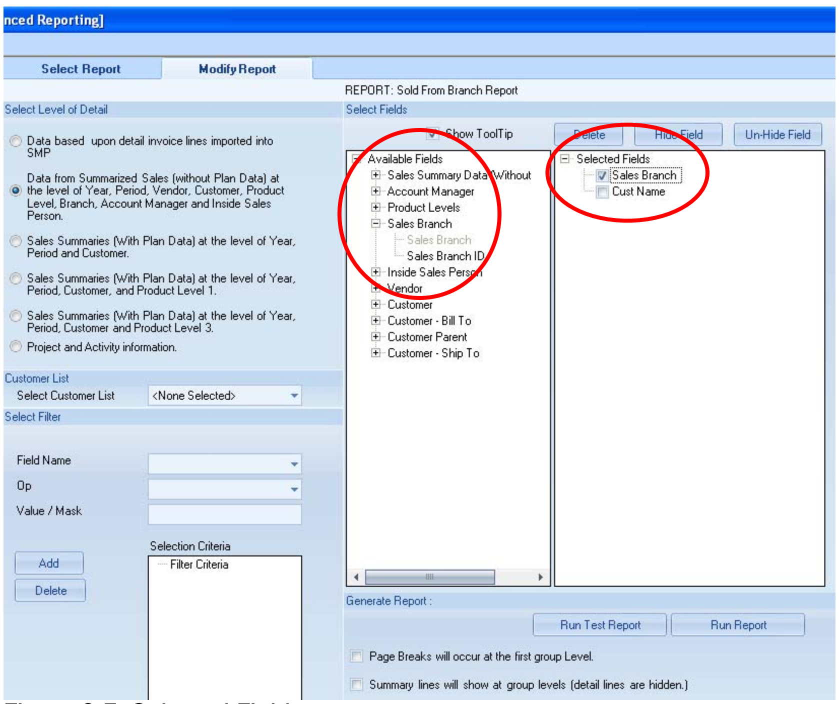

Figure 0-5: Selected Fields

f. Check the box next to any value in order to show the field's "total" in the report. For example, using Figure 13-5, the report would show a total for each "Sales Branch" group

g. Once all the chosen fields are selected, users can sort them by simply dragging and dropping them either ahead of – or below another field.

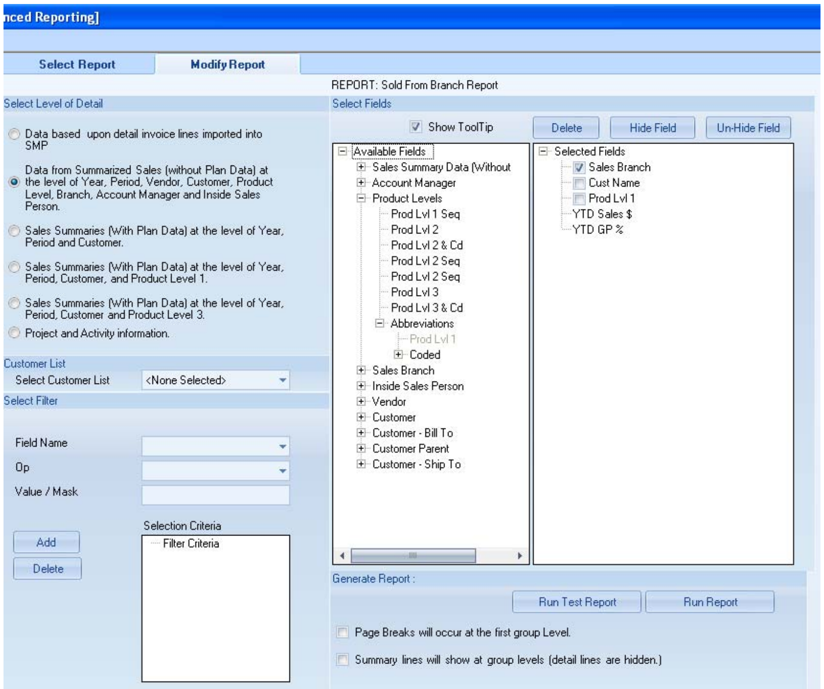

Figure 0-6: Selected Fields

3. **Third:** “Select Filter” allows users to filter the fields they have selected
    a. By Customer List
    b. By Name
    c. By Value

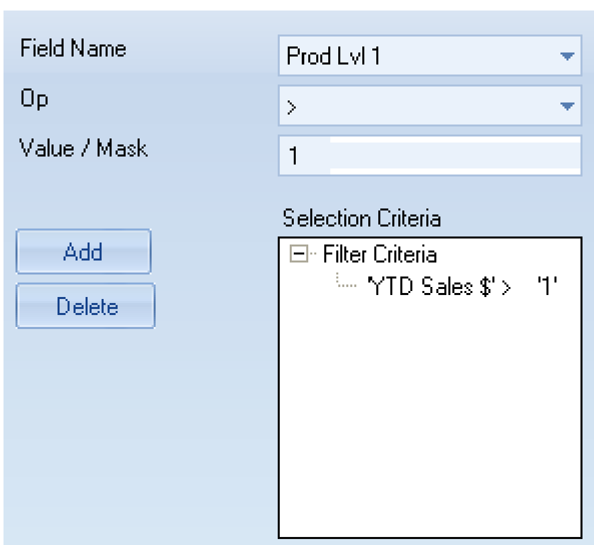

Figure 0-7: Selection Criteria

    d. This report will return results for customers who have purchased “Greater than $1” in YTD Sales.
    e. Users **must** hit the “Add” button to save the filter
    f. Symbols and their Meanings:
        i. = [Equal To]

ii. <> [Not Equal To]
iii. > [Greater Than]
iv. < [Less Than]
v. >= [Greater Than or Equal To]
vi. <= [Less Than or Equal To]
vii. Like [Looks Like] For example: Rock% or %Auto% would return “Rockwell Automation” **IMPORTANT:** The wildcard symbol (%) only works with the “Like” filter because this is the only filter criteria that assumes “something similar to” and allows use of the wildcard.
viii. In [In a List of] For example: Employee IDs not in sequential order in 1234;456;789; (note, semicolons separate the values, and there is a semicolon at the end of the value string)

4. **Fourth:** “Generate Report”
    a. SMP suggests running a test copy of the report first. A test copy will only return the first 100 rows of the report (you may not necessarily see 100 rows in Excel depending on the parameters of the report). This is a quick way to validate that the Test Report displays the desired results.
    b. There are two additional options for how the data is returned
        i. *Page Breaks will occur at the first group level*
            1. This will generate a separate worksheet for each change of value in the first field “checked” in the selected field list. For example: “Sales Branch” is checked in the “Selected Field” column in Figure 13-6. If you apply the Page Breaks option, it will generate a separate worksheet for *every* Sell Branch the customers purchased from.

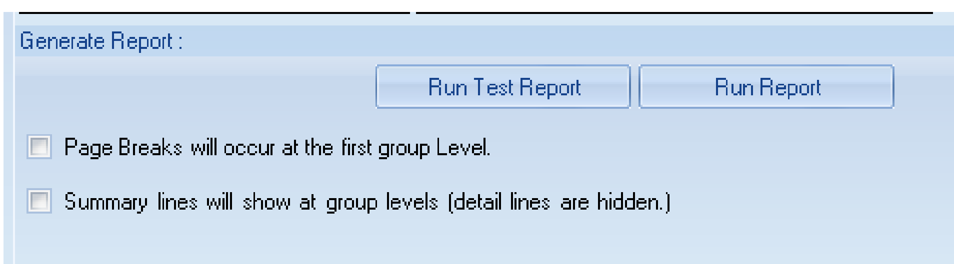

Figure 0-8: Two Options for how the data is generated in the Report

	A	B	C	D	E
1	Sold From Branch Report				
2	Report ID: 3				
3	Run By: Elizabeth (8ae16010-786e-4b6d-b714-705a5496e9aa)				
4	Run Date: 02/18/2008 11:04				
5					
6	**Sales Branch**	**Cust Name**	**Prod Lvl 1**	**YTD Sales $**	**YTD GP %**
7	SMP - JAX	LAMBDA TECHNOLOGIES INC	Lighting	$299.00	24.35%
8	SMP - JAX	LAMPE & MALPHRUS LUMBER	AB IC	$161.82	26.43%
9	SMP - JAX	LOUISIANA PACIFIC CORP	AB IC	$8,444.10	33.06%
10	SMP - JAX	LOUISIANA PACIFIC CORP	AB PLC/HMI	$3,054.25	34.73%
11	SMP - JAX	LOXCREEN CO INC	AB Sen/Saf/Con	$107.88	26.43%
12	SMP - JAX	LOXCREEN CO INC	AB Software	$1,240.00	22.98%
13	SMP - JAX	LUWA ENVIRONMENTAL	AB PLC/HMI	$2,478.75	19.13%
14	**SMP - JAX**			**$15,785.80**	**30.13%**
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SMP - JAX / SMP - GRE / SMP - NPTBCH / SMP - DEN / Report Total

Figure 0-9: Page Breaks sample report

ii. *Summary Lines will show at Group Levels (details are hidden)*

1. This will generate only the dollars associated with the checked field in the "Selected Field" column; in this case it was "Sales Branch".

	A	D	E	G	H
1	Sold From Branch Report				
2	Report ID: 3				
3	Run By: Elizabeth (8ae16010-786e-4b6d-b714-705a5496e9aa)				
4	Run Date: 02/18/2008 10:59				
5					
6	**Sales Branch**	**YTD Sales $**	**YTD GP %**		
7	SMP - JAX	$15,785.80	30.13%		
8	SMP - GRE	$17,471.17	31.92%		
9	SMP - NPTBCH	$7,467.11	28.02%		
10	SMP - DEN	$283.51	41.68%		
11	**REPORT TOTAL:**	**$41,007.59**	**30.59%**		
12					

Figure 0-10: Summary Lines sample report

iii. It is not necessary to check either of these boxes. SMP suggests experimenting with the report by checking and understanding these during report testing.

Sold From Branch Report

Report ID: 3

Run By: Elizabeth (8ae16010-786e-4b6d-b714-705a5496e9aa)

Run Date: 02/18/2008 11:13

Sales Branch	Cust Name	Prod Lvl 1	YTD Sales $	YTD GP %
SMP - JAX	SPECIALIZED TECHNOLOGIES INC	Lighting	$299.00	24.35%
SMP - JAX	87 LUMBER	AB IC	$161.82	26.43%
SMP - JAX	PACIFIC CORP	AB IC	$8,444.10	33.06%
SMP - JAX	PACIFIC CORP	AB PLC/HMI	$3,054.25	34.73%
SMP - JAX	NFS CO INC	AB Sen/Saf/Con	$107.88	26.43%
SMP - JAX	NFS CO INC	AB Software	$1,240.00	22.98%
SMP - JAX	LUWA INDUSTRIES	AB PLC/HMI	$2,478.75	19.13%
SMP - JAX			**$15,785.80**	**30.13%**
SMP - GRE	MILLER ELECTRIC	Encl/WW	$170.28	17.85%
SMP - GRE	CERTIFIED INDUSTRIAL	AB IC	$701.34	29.95%
SMP - GRE	CERTIFIED INDUSTRIAL	Encl/WW	$216.00	13.20%
SMP - GRE	CERTIFIED INDUSTRIAL	Fuses	$1,092.81	33.13%
SMP - GRE	CERTIFIED INDUSTRIAL	HiTech Misc	$616.00	35.00%
SMP - GRE	CERTIFIED INDUSTRIAL	Misc	$1,478.04	26.30%
SMP - GRE	CERTIFIED INDUSTRIAL	Wire/Conduit	$2,557.12	27.31%
SMP - GRE	CERTIFIED INDUSTRIAL	Wiring Devices	$104.00	25.00%
SMP - GRE	CERTIFIED INDUSTRIAL	Wirng Acc	$1,164.69	43.20%
SMP - GRE	BENSON CO	AB IC	$1,057.92	30.71%
SMP - GRE	BENSON CO	AB PLC/HMI	$356.70	28.73%
SMP - GRE	MACY INSTALLATION & SERVICE	AB PLC/HMI	$2,844.90	20.00%
SMP - GRE	BRADY SYSTEMS INC	AB IC	$319.74	14.99%
SMP - GRE	BRADY SYSTEMS INC	AB PLC/HMI	$173.25	17.33%
SMP - GRE	BRADY SYSTEMS INC	Wire/Conduit	$49.96	15.01%
SMP - GRE	VANDALAY LLC	AB IC	$171.13	27.58%
SMP - GRE	VANDALAY LLC	AB PLC/HMI	$240.12	32.80%
SMP - GRE	LINDSTROM INC.	AB IC	$1,272.80	26.43%
SMP - GRE	LINDSTROM INC.	AB Sen/Saf/Con	$265.01	31.91%
SMP - GRE	LINDSTROM INC.	[illegible]es	$151.06	33.37%

Sold From Branch Report

Figure 0-11: Sold From Branch Report

iv. The above report shows branch sales. Since we checked the box in front of “Sales Branch” in the “Selected Field” column, the branch sales totals are displayed at the bottom of each group.

v. If errors exist within a report the standard “Processing Errors” tab that is created with all reports will remain the visible tab. See Figure 13-12

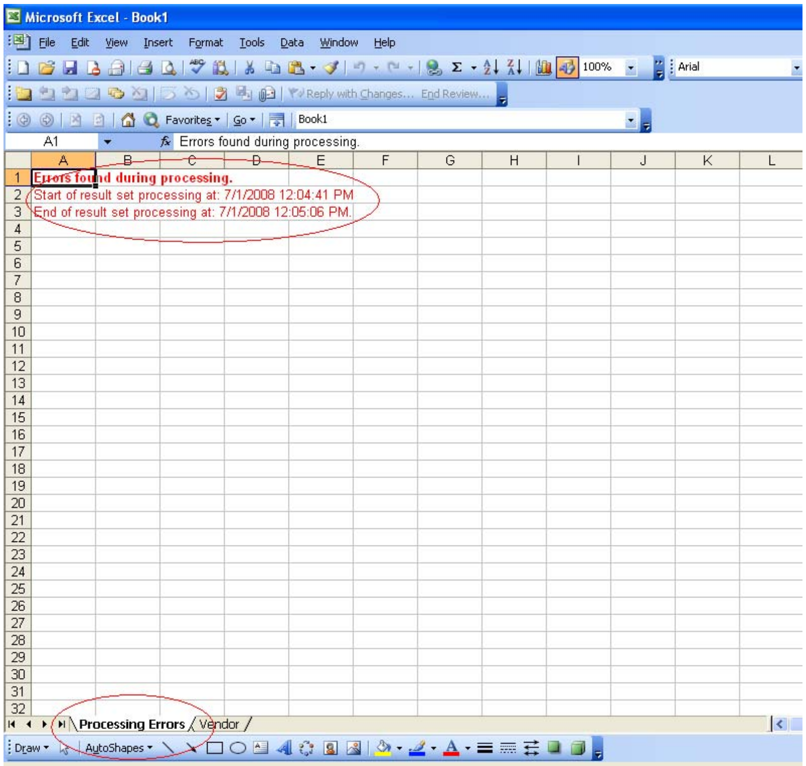

Figure 0-12: Errors found during processing

Modify Existing Report

Users have the ability to modify reports that they have created.

To Rename an Existing Report,

1. Select the Copy feature
2. Enter the new report name
3. Now, inactivate the old report (keep the copied report with new name)

To Modify an Existing Report,

1. Select the "Modify" feature and highlight the report to be modified
2. Hit Next (or double click on the report name) and continue creating the report using the same steps used to create a "New" report

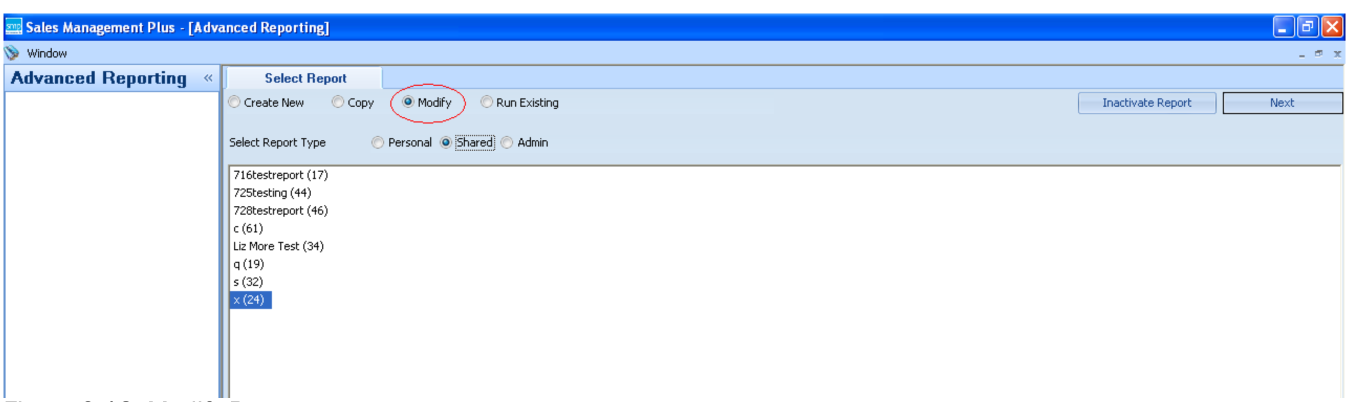

Figure 0-13: Modify Report

To Remove an Existing Report,

1. Select the “Modify” feature
2. Click the “Inactivate Report” button
3. NOTE: Users can only inactivate reports that they personally created (whether they are shared or personal)

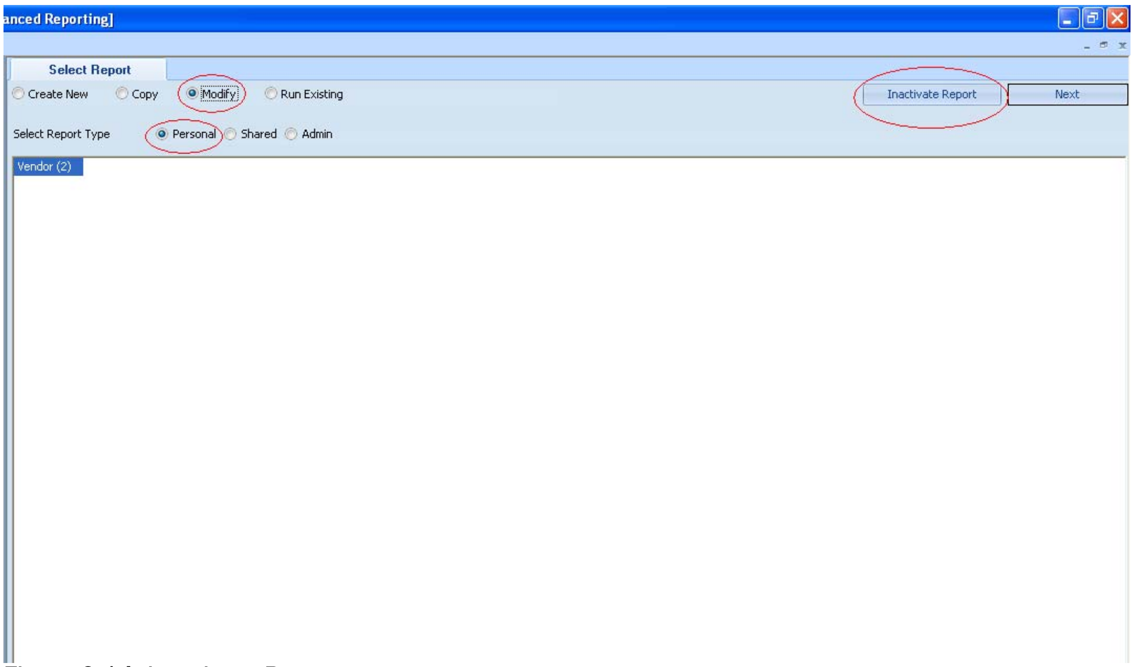

Figure 0-14: Inactivate Report

3. If you inadvertently made a report “Shared” and intended the report to be “Personal” (or vice versa), you can correct the report to the proper sharing options.
    a. Select “Copy” for the report in question
    b. Rename the report
    c. Change the sharing permissions to the correct choice
    d. Click “Next” to save the report
    e. Go back to the Select Report tab
    f. Inactivate the report with the incorrect permissions

Copy Existing Report

To Copy an Existing Report,

1. Select the “Copy” feature and highlight the report to be copied
2. Rename the report
3. Select the Report Type: “Personal”, “Shared” or “Admin”
4. Click the "Next" button to continue creating the report using the same steps as used to create a “New” report. Users may completely change the copy of the report to meet their needs.

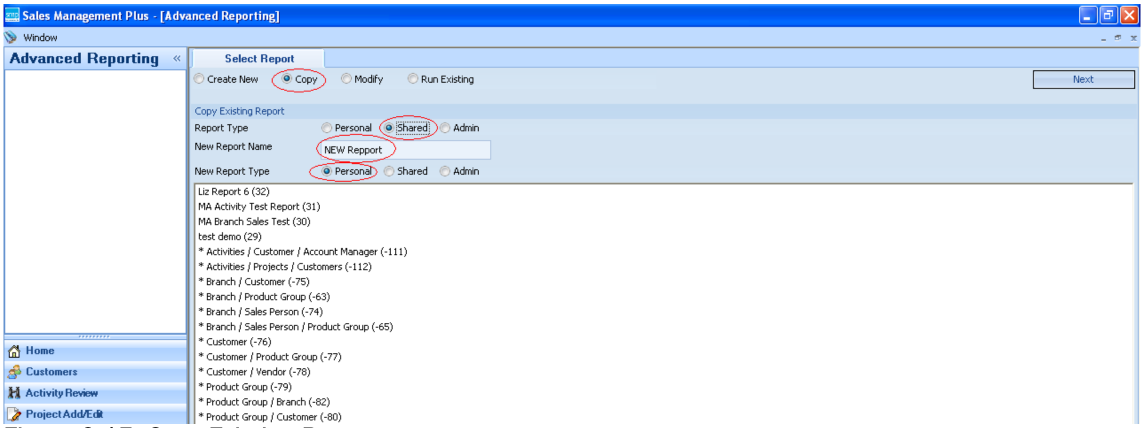

Figure 0-15: Copy Existing Report

Tips and Troubleshooting

- IMPORTANT: Do not click within the Excel sheet as it is being created because Excel will stop loading the spreadsheet with data. You will have to re-run the report.

- When using the Filter in Advanced Reporting, the wildcard symbol (%) only works with the ‘Like’ filter because this is the only filter criteria that assumes “something similar to” and allows use of the wildcard.

- The “Processing Results” tab will go away once a report has been successfully built; if there were any problems building the report, the tab will remain and the error will be noted.

- Users will know when a report (or test report) has completed building because the worksheets at the bottom of the Excel Workbook, Sheets 1, 2 and 3, will go away.

  

  Figure 0-16: Excel Worksheets 1 through 3

- If you run a report and would like to terminate the process, close the open instance of Excel by using the red close button  in the upper right hand corner of the workbook.

- When running a report that includes Customer Name, you must include the Customer ID number in your report – this will keep customers with the exact same div/ref name from having incorrect results calculated and it will not affect the total on the report. If you do not want the Customer ID field to be visible on the report, you can hide it by using the “Hide” field function before running the report.

  

  Figure 0-17: Hide Field Feature

- If running Advanced Reporting at the “Plan Data and Sales”, make sure your SMP Administrator has saved the current goals for reporting. This can be accomplished through the SMP Administration Utility: Select the Goals Management tab and click the “Save Current SMP Goals” button.

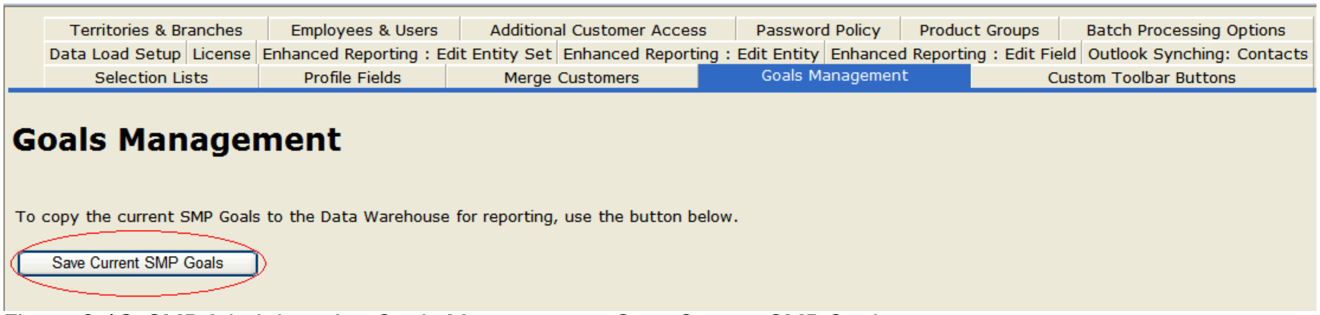

Figure 0-18: SMP Administration Goals Management - Save Current SMP Goals

- If you run a report and select “Summary Lines” you MUST remember to check one of the categories in your selected fields list or the report will not run correctly.

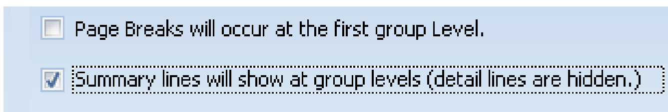

Figure 0-19: Summary Lines

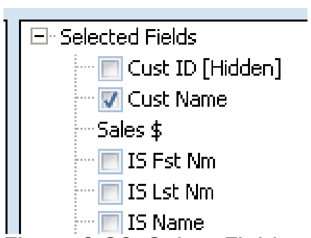

Figure 0-20: Select Fields - Cust Name

- If you run a report based on Invoice Line Details, user should be especially cautious. This level of detail is designed to capture ALL data rows from your POS Data that has been supplied to SMP and, therefore, it is entirely possible that you could create a report with **over a million rows** – this will take an EXTREMELY LONG TIME to produce.

  Here are some helpful tips to avoid creating a LARGE report:

  - Use “Summary Lines” and filter criteria to isolate only the data you really want from the invoice detail
  - Determine if the information you want is available at a “higher level of detail” than invoice lines
  - voice lines