

# **LOST SALES REPORTING**

User Manual

Published by Mascidon, LLC

November 2011

[www.mascidon.com](http://www.mascidon.com)

248-432-2676

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## Lost Sales Documentation

The lost sales functionality provides the opportunity to record a lost sales line or a complete sales order. This documents how to record these lost opportunities.

### Loss of a single sales order line

As you are entering a sales order, any line can be highlighted and the 'Lost Sales' button clicked. This is shown in Figure 1.1.

The screenshot shows the 'Sales Order' window for customer HMA. The window is divided into several sections:

- Customer Information:** Customer: HMA, Name: HMA Inc., Contact Person: (dropdown), Customer Ref. No.: 423434, BP Currency: \$.
- Order Details:** No.: Primary, 300014; Status: Open; Posting Date: 11/05/11; Delivery Date: 11/05/11; Document Date: 11/05/11.
- Contents Tab:** A table with columns: #, Type, Item No., Item Description, Quantity, Whse, Bin. The table contains 5 rows of items, all of which are '16 x 6.5 Aluminum'. Row 3 is highlighted in yellow. The 'Lost Sales' button at the bottom is also highlighted with a red box.
- Accounting Tab:** Summary Type: No Summary.
- Summary Section:** Total Before Discount, Discount, Rounding, Tax, Total.
- Buttons:** Add, Cancel, Lost Sales, Lost Full Order, Copy From, Copy To.

#	Type	Item No.	Item Description	Quantity	Whse	Bin
1		0ZX30DSLAD	16 x 6.5 Aluminum	100	01	SHIP
2		0ZX30DSLAE	16 x 6.5 Aluminum	10	01	SHIP
3		0ZX30PAKAC	16 x 6.5 Aluminum	24	01	SHIP
4		IAN31PAKAB	16 x 6.5 Aluminum		01	SHIP
5						SHIP

**Figure 1.1 Recording Loss of a Single Sales Order Line**

When you click on the 'Lost Sales' button, two additional screens are shown – as seen in Figures 1.2 and 1.3. For Figure 1.2, simply click on the 'Close' button. On the screen shown in Figure 1.3, you can simply click OK if the recorded lost sale is correct. You can change the quantity lost or the reason – as shown in Figure 1.4. Make the changes required and click the Update button.

This brings you back to the sales order. Proceed taking the order.

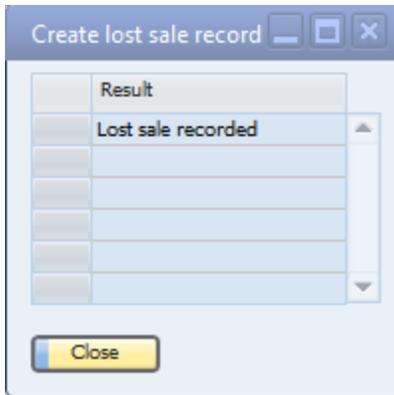


Figure 1.2 Message Showing the Lost Sales Record is Created

#	Code	Name	Item	Quantity	Custo...	Date	U.	Comment	Reason
28	00001027	00001027	1AN31PAKAB	1	CHRYSLER	11/04/11	1		
29	00001028	00001028	1FY10PAKAC	1	CHRYSLER	11/05/11	1		Out of stock
30	00001029	00001029	1FY09PAKAC	1	CHRYSLER	11/05/11	1		Quality issue
31	00001030	00001030	1FY09PAKAC	1	CHRYSLER	11/05/11	1		Price too high
32	00001031	00001031	1AN31PAKAD	4	SMC	11/05/11	1		Out of stock
33	00001032	00001032	1FY10PAKAC	12	CHRYSLER	11/05/11	1		Price too high
34	00001033	00001033	1FY09PAKAC	4	HMA	11/05/11	1		Lost
35	00001034	00001034	1FY10PAKAC	7	HMA	11/05/11	1		Lost
36	00001035	00001035	1AN31PAKAD	5	HMA	11/05/11	1		Lost
37	00001036	00001036	1AN31PAKAC	1	HMA	11/05/11	1		Price too high
38	00001037	00001037	0PC17000	4	CHRYSLER	11/05/11	1		Lost
39	00001038	00001038	0ZX30PAKAC	24	HMA	11/05/11	1		Lost
40									

Figure 1.3 Display of the Lost Sale Recorded

#	Code	Name	Item	Quantity	Custo...	Date	U.	Comment	Reason
28	00001027	00001027	1AN31PAKAB	1	CHRYSLER	11/04/11	1		
29	00001028	00001028	1FY10PAKAC	1	CHRYSLER	11/05/11	1		Out of stock
30	00001029	00001029	1FY09PAKAC	1	CHRYSLER	11/05/11	1		Quality issue
31	00001030	00001030	1FY09PAKAC	1	CHRYSLER	11/05/11	1		Price too high
32	00001031	00001031	1AN31PAKAD	4	SMC	11/05/11	1		Out of stock
33	00001032	00001032	1FY10PAKAC	12	CHRYSLER	11/05/11	1		Price too high
34	00001033	00001033	1FY09PAKAC	4	HMA	11/05/11	1		Lost
35	00001034	00001034	1FY10PAKAC	7	HMA	11/05/11	1		Lost
36	00001035	00001035	1AN31PAKAD	5	HMA	11/05/11	1		Lost
37	00001036	00001036	1AN31PAKAC	1	HMA	11/05/11	1		Price too high
38	00001037	00001037	0PC17000	4	CHRYSLER	11/05/11	1		Lost
39	00001038	00001038	OZX30PAKAC	5	HMA	11/05/11	1		Out of stock
40									

**Figure 1.4 Altering a Lost Sale Record**

### Loss of a Complete Sales Order

In some instances you will record a full sales order and the customer will not place the order. In these instances, the process is to Add the sales order as if it were a normal order, and then retrieve the sales order and right click to 'Cancel' the sales order. Then click on the 'Lost Full Order' button and the system will record each of the items on this sales order as having been lost. The popup window shown in Figure 1.5 will be displayed. Enter the reason for the loss of this order and click ok to process and OK.

**Figure 1.5 Reason for Loss of an Order**

A message will be displayed showing the number of lost sales items that have been created. That's it – the complete sales order loss has been recorded.

### Lost Sales Report

The lost sales can be reported. Any reports or queries can be created against the file '@DCMLOSTSALES'. One report has been created and provided. Click on the 'Lost Sales Report'. The

popup shown in Figure 1.6 is displayed. You have a choice of how to sort the report – by item (by item – date), by customer (by customer – item – date), or by reason (by reason – item – date). The next choice is what starting date to use for displaying the lost sales. For instance, to see all of the lost sales after October, enter 10/31 as the date. Clicking ‘OK’ will display the report shown in Figure 1.7. The contents of this report can be exported to Excel (normal SAP function) for further analysis.

Define survey variables

Sort by item? Y

Sort by customer? N

Sort by reason? N

After date 10/31/11

Ok to process Y

OK Cancel

**Figure 1.6 Lost Sales Report Selections**

Item	Quantity	Customer	Date	Reason	Comment
00000EXP	1	HMA	11/04/11		
00000EXP	2	SMC	11/04/11		
0PC16000	1	HMA	11/04/11		
0PC17000	4	CHRYSLER	11/05/11	Lost	
0YW39ZDJAB	1	ALINK	11/04/11	Testing reason er	
0YW39ZDJAB	10	CHRYSLER	11/03/11		
0ZX30DSLAD	1	ALINK	11/04/11	Testing reason er	
0ZX30DSLAF	1	ALINK	11/04/11	Testing reason er	
0ZX30DSLAF	1	CHRYSLER	11/04/11		
0ZX30PAKAC	6	HMA	11/05/11	Out of stock	
1AN31PAKAB	1	CHRYSLER	11/04/11		
1AN31PAKAC	1	CHRYSLER	11/04/11		
1AN31PAKAC	1	CHRYSLER	11/04/11		
1AN31PAKAC	1	CHRYSLER	11/04/11		
1AN31PAKAC	1	CHRYSLER	11/04/11		
1AN31PAKAC	1	HMA	11/05/11	Price too high	
1AN31PAKAD	5	HMA	11/05/11	Lost	
1AN31PAKAD	4	SMC	11/05/11	Out of stock	
1FY09PAKAC	1	CHRYSLER	11/05/11	Quality issue	
1FY09PAKAC	1	CHRYSLER	11/05/11	Price too high	
1FY09PAKAC	4	HMA	11/05/11	Lost	
1FY09PAKAC	10	SMC	11/05/11	Out of stock	

**Figure 1.7 Lost Sales Report**