

Sales Pattern Analysis User Guide

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Sales Pattern Analysis

The Trinity Sales Pattern Analysis module provides functionality for analyzing and reporting on sales patterns.

You can define periods on which sales analysis will be based, updating data as and when required. You can then compare sales patterns for periods on screen or print out a report.

The key features of the Sales Pattern Analysis module are:

- The facility to define the periods that will be used to analyse sales
- The facility to update sales analysis data as and when required
- The facility to enquire and report on sales patterns
- The facility to warn of sales anomalies

What is Sales Pattern Analysis?

Sales patterns are based on yearly cycles, which are set up using the Sales Pattern Maintenance window. After the first sales pattern year has been set up, subsequent years must be created on a sequential basis. For example, if the first year created is 2002, the next year created must be either 2001 or 2003.

Within each sales pattern year, sales periods are set up based on a calendar monthly, four weekly, or weekly basis. When you update the sales analysis data using the Sales Pattern Analysis Update window, all customer sales for given periods can be analyzed based on items sold, customers sold to, and the sites and addresses from which items were sold and bought.

Sales analysis data is derived from sales orders, backorders, and both posted and unposted invoices. Data is created so that it does not overrun related documents; for example, if you have a sales order for 20 item X's, but have so far invoiced only 10, sales pattern analysis will display this information. You can view sales pattern data in the Sales Pattern Inquiry window or produce reports using the Sales Pattern Analysis Report window.

The Inquiry and report will display warnings on certain data. You can define your reason for when the warning symbol will be displayed by amending the SQL script; `tcsSOPSP00050_SetSalesPattern AnalysisWarningFlag`. By default, the script is set to display the warning symbol on a line where the current quantity is less than 50% of the average sales quantity for the previous 6 periods.

Note that when you update sales pattern analysis data, any previous sales analysis data will be overwritten. Large quantities of data are processed when you run the update, and as such, it is recommended to run the update during a quiet period on your system.

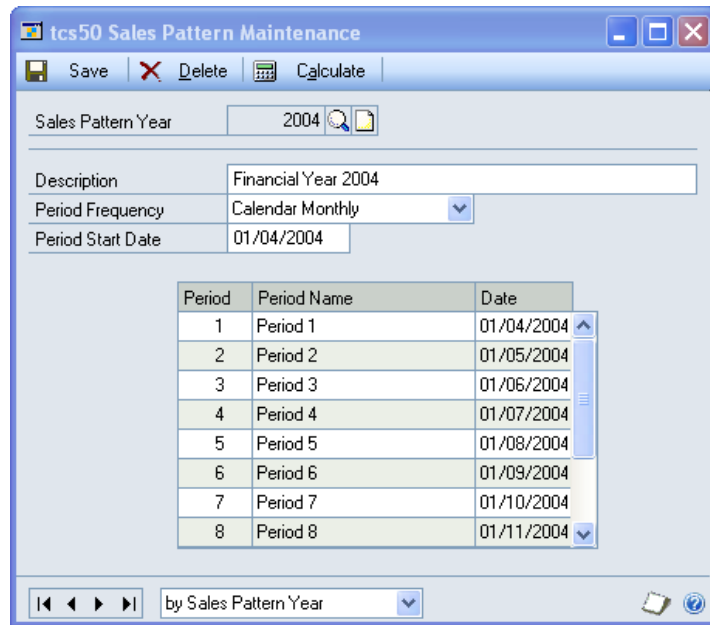
If you are using the Trinity Catalogue Based Sales module, then additional functionality is available. See Sales Pattern Analysis with the Catalogue Based Sales Module for further details.

1. Sales Pattern Maintenance Window

*Tools >> Setup >> Trinity
>> Sales Pattern Analysis
>> Setup*

Use the Sales Pattern Maintenance window to:

- Set up sales pattern years



1.1 Setting Up Sales Pattern Years

To set up sales pattern years in the Sales Pattern Maintenance window:

1. In the Sales Pattern Year field, enter the year that you want to be enabled for sales pattern analysis, or select one using the lookup.

Note that it is recommended to set up sales pattern years for all years that history has been retained on your system.

Once you have created a sales pattern year, other sales pattern years you create must be run sequentially to the ones that have already been created. For example, if you have set up the year 2002, you cannot set up the year 2004 until you have set up the year 2003. You would not be able to set up the year 2000 until you had set up the year 2001.

2. Enter a description for the sales pattern year.
3. From the Period Frequency drop-down menu, select Calendar Monthly, Four Weekly, or Weekly. This selection establishes how sales patterns will be analyzed.

Calendar Monthly	Sales pattern analysis will be based on 12 periods per sales pattern year
Four Weekly	Sales pattern analysis will be based on 13 periods per sales pattern year
Weekly	Sales pattern analysis will be based on 52 periods per sales pattern year

The period frequency can be changed if required. If you change the period frequency for a sales pattern year, you should click the Calculate button to reset the periods (see step 5).

4. The first time you create a sales pattern year, you should enter a date in the Period Start Date field. Any date may be entered, though generally, it will be the start of the financial or calendar year.

The end date for the period will always default to 12 months from the entered start date.

Subsequently created sales pattern years will have the period start date set automatically as the start date for the entered sales pattern year. The start date for all entered sales pattern years will always be the same as that entered for the first created sales pattern year. For example, if you set the period start date for sales pattern year 2002 to be 01/04/02, then the period start date for sales pattern year 2003 would, by default, be 01/04/03.

- Click the Calculate button. Period details (period number, period name, and period start date) will be generated in the scrolling window. The period name and sales pattern year description can be manually amended as required.

To reset the period details back to the original defaults, click the Calculate button.

- Click Save.

Click the Delete button to delete sales pattern years. Note that you can only delete a sales pattern year that is at one end of a cycle. For example, if you have up sales pattern years from 2000 to 2004, you could not delete 2003 until 2004 has been deleted.

2. Sales Pattern Analysis Update Window

*Tools >> Routines >>
Trinity >> Sales Pattern
Analysis >> Sales Patt.
Update*

Use the Sales Pattern Analysis Update window to:

- Update sales pattern analysis data

Sales Pattern Year	Period	Start Date	End Date	Period Name
2003	12	01/03/2004	12/03/2004	Period 12
2003	11	01/02/2004	12/02/2004	Period 11
2003	10	01/01/2004	12/01/2004	Period 10
2003	9	01/12/2003	12/12/2003	Period 9
2003	8	01/11/2003	12/11/2003	Period 8
2003	7	01/10/2003	12/10/2003	Period 7

2.1 Updating Sales Pattern Analysis Data

Updating sales pattern analysis data in the Sales Pattern Analysis Update window:

- The window will open with the current date displayed. Sales pattern details for this date will also be displayed. The previous six periods will be displayed in the scrolling window.

All end dates will be set to the date displayed in the Current (or the closest possible) date within that period. The sales pattern analysis functionality examines sales for up to the same date within each period. If you want to analyse sales for entire periods, you should set the date in the Current Date field to the end of a period.

In the Current Date field, enter the date through which you want to view sales pattern analysis. All end dates for periods in the scrolling window will be updated to match as closely as possible the entered date.

2. Select a Period end calculation method from the drop-down menu:

Period Start + Days in Current Period	Compares the number of days sales in the current period with the same number of days sales for previous periods
Use Period End Date	Compares the number of days sales for this period with the total sales of previous periods

3. Click the Update button. Sales pattern analysis data for the date specified will be created. This data can be viewed in the Sales Pattern Inquiry window or the Item Catalogue and Search window (see Sales Pattern Analysis with the Catalogue Based Sales Module) or reported on using the Sales Pattern Analysis Report window.

Note that any previous sales analysis data will be overwritten. Large quantities of data are processed when you run the update, and as such, it is recommended to run the update during a quiet period on your system.

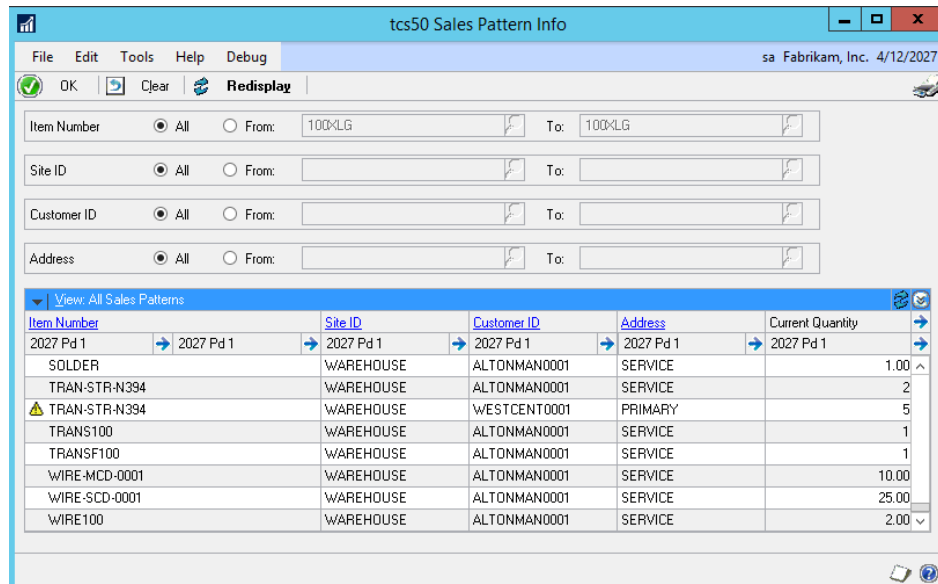
4. Click OK to close the window.

3. Sales Pattern Inquiry Window

Inquiry >> Trinity >> Sales Pattern Analysis >> Sales Patt. Inquiry

Use the Sales Pattern Inquiry window to:


- View sales pattern analysis data




3.1 Viewing Sales Pattern Analysis Data

To view sales pattern analysis data in the Sales Pattern Inquiry window:

1. All item numbers, site IDs, Customer IDs, and addresses will be selected for analysis by default. To view by range, click the From option required and enter the required range or select it using the lookups.
2. Click the Redisplay button. Sales quantities for the selected range for the current period and the previous six periods will be displayed in the scrolling window.

-  The previous period details are displayed in the scrolling window. Click the Show button to view period sales quantities.

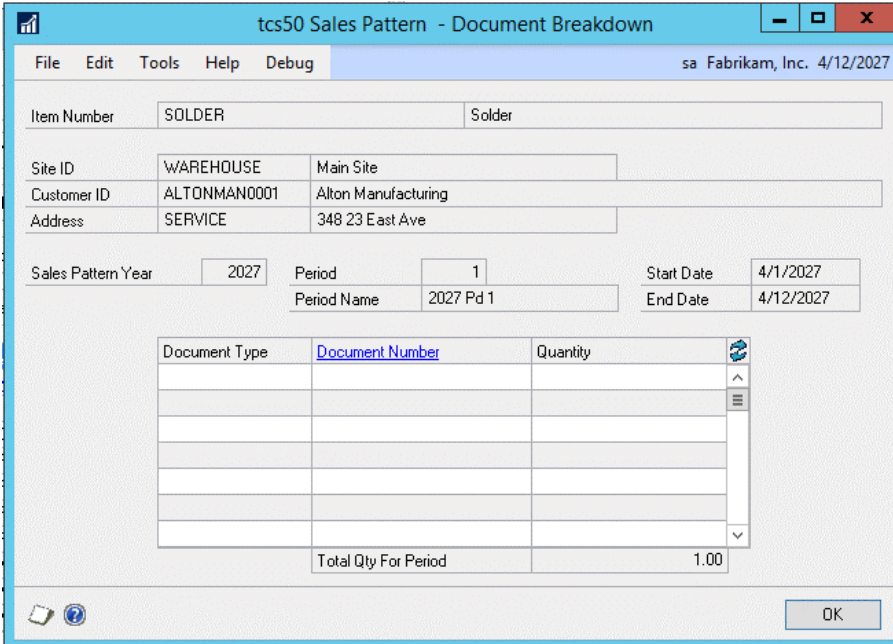
Note that the facility is available to display warnings for line items.

-  You can define your reason for when the warning symbol will be displayed by amending the SQL script; tcsSOPSP00050_SetSalesPattern AnalysisWarningFlag. By default, the script is set to display the warning symbol on a line where the current quantity is less than 50% of the average sales quantity for the previous 6 periods.

3. To further define the sales patterns you view, click the View drop-down menu and select an option.

Note that if you select the Show Site ID Summary option, the Site ID range fields will be disabled, and the scrolling window will display accumulated quantities for all sites.

4. To view further details, click on a line then click the expansion button for the required quantity field. This will display a document breakdown of the sales in the Sales Pattern Inquiry - Document Breakdown window.



Document Type	Document Number	Quantity
Total Qty For Period		1.00

All documents that have sales quantities for the selected range and period will be displayed in the scrolling window. Posted invoices are denoted by an **H** symbol. Only document types of a back order, order, and invoice are included in the sales quantity. To view full document details, click on a document line in the scrolling window then click the Document Number link to display the Sales Transaction Inquiry Zoom window.

Click OK to close the Sales Pattern Inquiry - Document Breakdown window and return to the Sales Pattern Inquiry window.

5. Click OK to close the window.

Note that you can click the Print icon to display the Sales Pattern Analysis Report window.

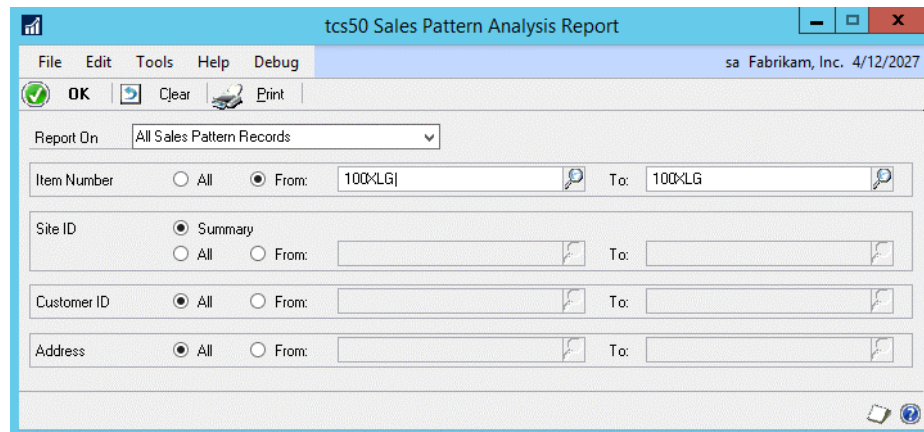
Also, note that you can clear your selected range at any point by clicking the Clear button.

4. Sales Pattern Analysis Report Window

*Reports >> Trinity
>> Sales Pattern
Analysis >> Sales
Patt. Report*

Use the Sales
Pattern Analysis
Report window to:

- Print sales pattern analysis reports



Note that you can also access this window from the Sales Pattern Inquiry window.

4.1 Printing Sales Pattern Analysis Reports

To print sales pattern analysis reports in the Sales Pattern Analysis Report window:

1. From the Report On drop-down menu, select to print all sales pattern records, sales patterns with warnings, or sales patterns without warnings.
2. All item numbers, Customer IDs, and addresses will be selected for reporting by default. A site ID summary will be selected by default. This accumulates sales analysis data for all sites. To report on all site IDs individually, click the All option. To report by range, click the From option required and enter the required range or select it using the lookups.
3. Click Print, then in the Report Destination dialogue box, select a print destination, and click OK. A sales pattern analysis report for your selected criteria will be printed.
4. Click OK to close the window.

Note that you can click Clear at any point to clear your selection.

5. Sales Pattern Analysis with the Catalogue Based Sales Module

If you are using the Sales Pattern Analysis module in conjunction with the Trinity Catalogue Based Sales module, then you have further options for sales pattern analysis.



Use the Maintain Item Catalogue and Search Defaults window to define the sales periods that you want to view in the item catalog, and whether to display sales period warnings.

In the Item Catalogue and Search window, the sales period quantities that you have selected to be included will be displayed in the scrolling window (with sales period warnings if selected). This facility to view sales patterns in the item catalog provides the user with valuable information when entering sales orders.

There is also an option to only show items with a sales pattern warning. Selecting this option will mean that only items that have a warning set against them will be displayed.

Appendix A

Sales Pattern Analysis – Access to Windows

Window Name	 Menu Access	 Other Access
Sales Pattern Analysis Report	Reports >> Trinity >> Sales Pattern Analysis >> Sales Patt. Report	Sales Pattern Inquiry window >> Print button
Sales Pattern Analysis Update	Tools >> Routines >> Trinity >> Sales Pattern Analysis >> Sales Patt. Update	
Sales Pattern Inquiry	Inquiry >> Trinity >> Sales Pattern Analysis >> Sales Patt. Inquiry	
Sales Pattern Inquiry - Document Breakdown		Sales Pattern Inquiry window >> Expansion button
Sales Pattern Maintenance	Tools >> Setup >> Trinity >> Sales Pattern Analysis >> Setup	

Appendix B

Sales Pattern Analysis – links to other Trinity modules

Window Name	Module	Link to Module	Modification
Item Catalogue and Search window	Catalog Based Sales	Sales Pattern Analysis	Sales periods can be displayed, with or without sales period warnings
Maintain Item Catalogue and Search Defaults window	Catalog Based Sales	Sales Pattern Analysis	Additional options to select to display sales periods and sales period warnings in the item catalog

Appendix C

Sales Pattern Analysis - Reports

Report Name	Module	Functionality
Sales pattern analysis report	Sales Pattern Analysis	Prints detailed sales patterns, with parameters based on items, sites, customers, and addresses.

Appendix D

About Trinity

Help >> About Microsoft Dynamics GP >> Additional >> About Trinity Suite

Use the About Trinity Suite window to check your registration information and installation details. The window will tell you which Trinity modules you are registered to use and which have been installed on your system.

