

Stinson Solutions'
Sales Analyzer
User Guide

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Setting the Sales Analyzer Options

Each time you open Sales Analyzer, the analysis options appear on the Main Menu (Figure 1-1). Your option choices are saved from session to session, but you can change them at any time.

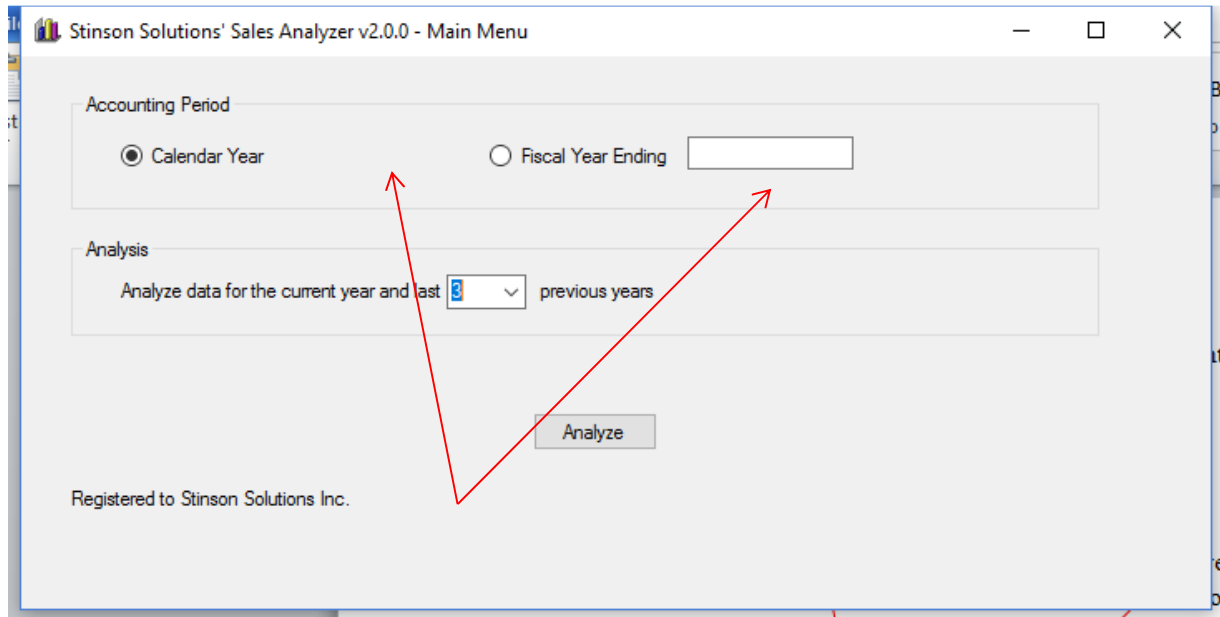


Figure 1-1

Sales Analyzer accumulates and reports your sales for each year, so it needs to know whether your accounting period covers a calendar or fiscal year. If your accounting period is a fiscal year, also enter the date each fiscal year ends (in the MM/DD format).

Next you select how many years of sales you want to analyze. You can analyze up to 9 previous years in addition to the current year (Figure 1-2).

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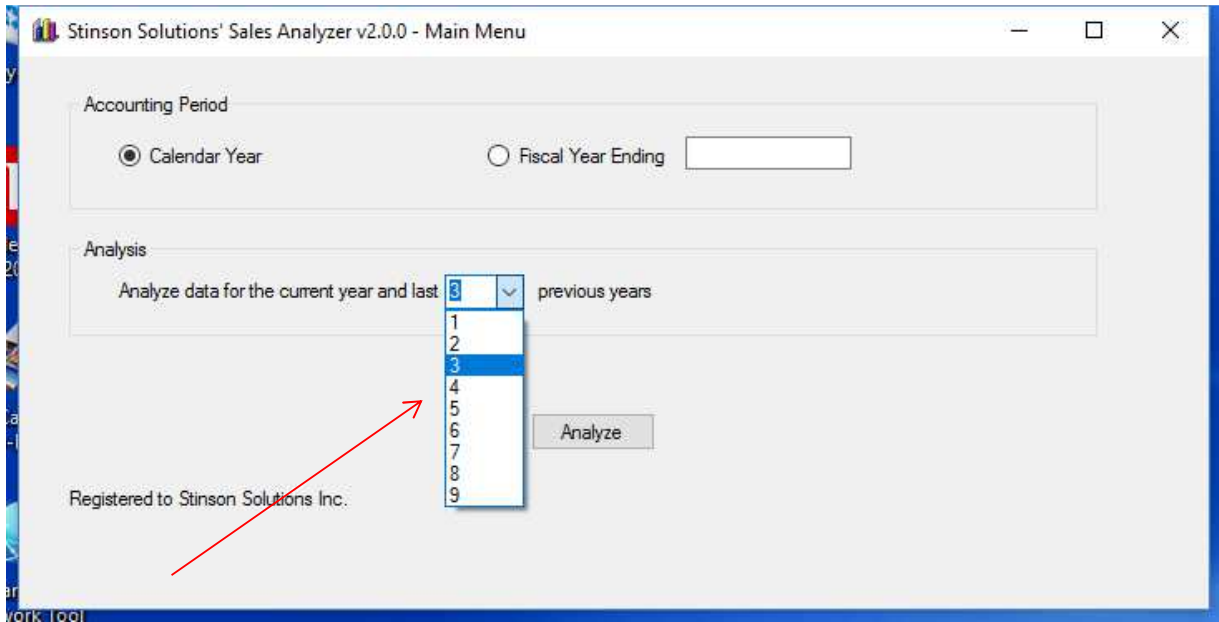


Figure 1-2

Once you've set the Accounting Period and selected the number of years to analyze, you simply click the "Analyze" button (Figure 1-3).

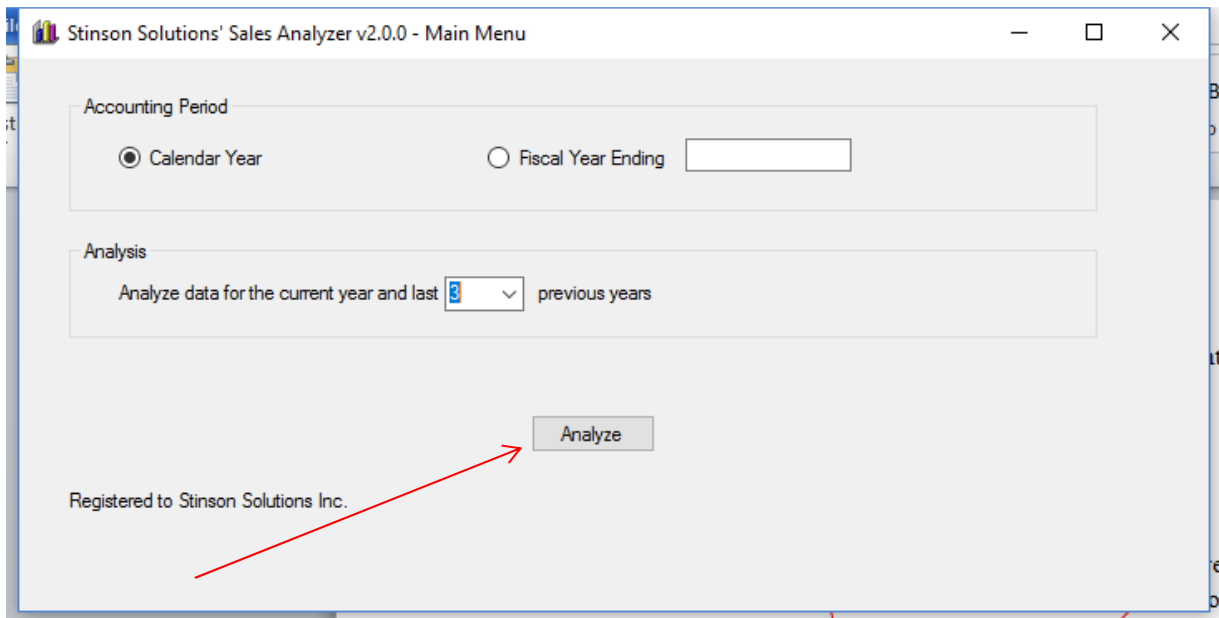


Figure 1-3

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Sales Analyzer automatically retrieves all invoices from QuickBooks for the number of the years specified, accumulates the yearly totals (for each calendar or fiscal year) and presents that data to you by customer, by sales rep and by item.

The initial retrieval of invoices and other information it needs can take a while, depending on how many years you chose to analyze. But subsequent retrievals only bring in data that has been modified since the last retrieval, so processing time is kept to a minimum.

Retrieving Data from QuickBooks the First Time

The first time Sales Analyzer retrieves data from QuickBooks, you must log into QuickBooks as Admin and switch to single user mode so you can set the access privileges for Sales Analyzer. Sales Analyzer will remind you of that fact (Figure 2-1).

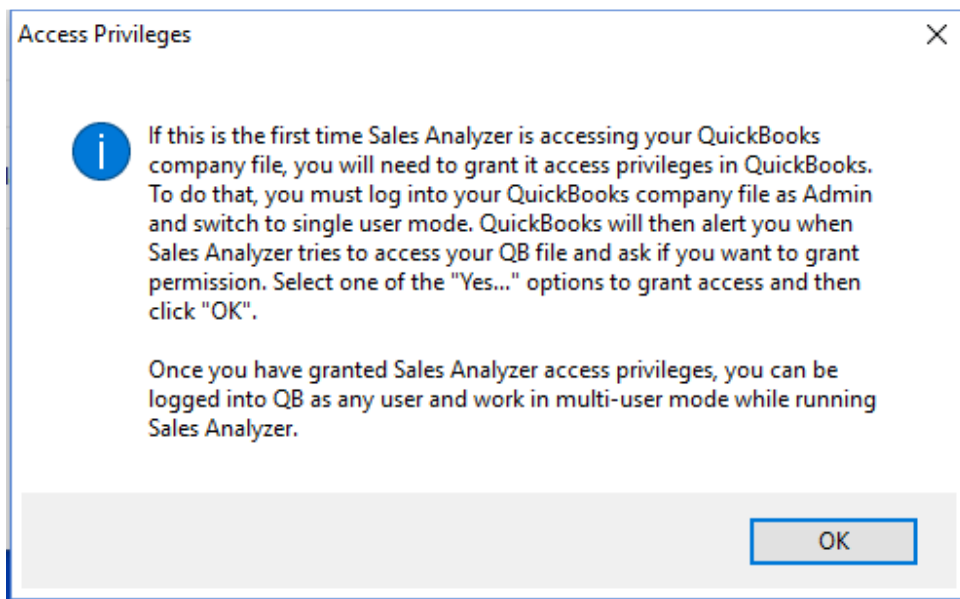


Figure 2-1

Click “OK” to continue with the retrieval. QuickBooks will then alert you that Sales Analyzer is trying to access your company file and ask if you want to grant permission (Figure 2-2).

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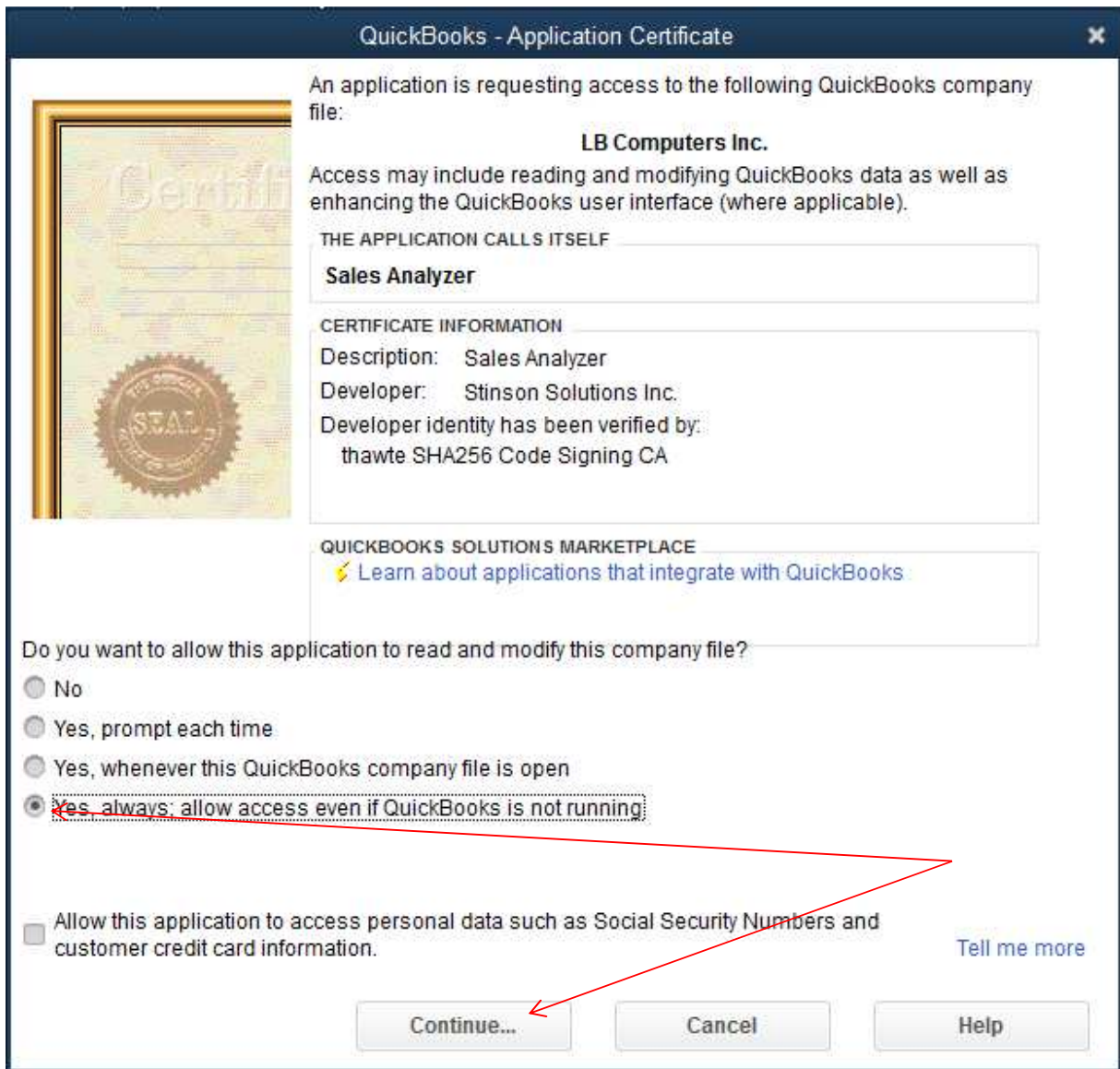


Figure 2-2

We recommend that you select “Yes, always; allow access even if QuickBooks is not running” (and if you have multiple users, allow Sales Analyzer to log in as Admin), but any of the “Yes” options will work. Then click “Continue”. QuickBooks will then display a confirmation (Figure 2-3).

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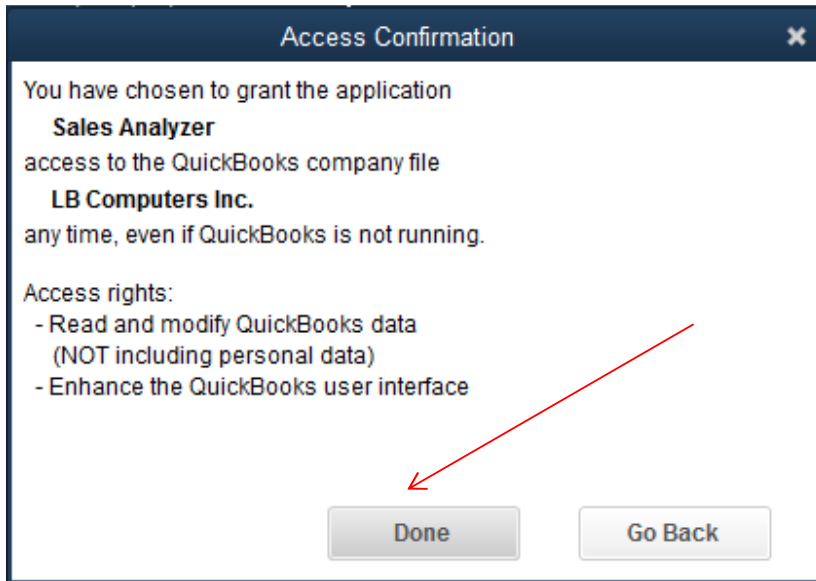


Figure 2-3

Click “Done” and Sales Analyzer will complete its retrieval of invoices and other data needed for the Sales Analyzer reports.

Sales Analyzer Reports

Once Sales Analyzer has retrieved all the data it needs from QuickBooks, it presents the three trended sales reports together for easy access (Figure 3-1 By Customer, Figure 3-2 By Rep and Figure 3-3 By Item).

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Sales Analysis

By Customer | By Rep | By Item

1 of 1

Find | Next

Name	Added to QB	Current Yr	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
Atrium Hospital	5/14/2014	5,851.79	0.00	14,579.78	0.00						
City of Dayton	4/25/2016	16,279.72	0.00	0.00	0.00						
Delco Inc	7/7/2014	0.00	0.00	6,299.79	0.00						
Home Depot	11/15/2015	4,899.93	35,583.26	0.00	0.00						
James Law Office	11/3/2014	0.00	0.00	4,799.84	0.00						
Kettering Health Network	5/7/2016	3,639.64	0.00	0.00	0.00						
Menards	8/29/2015	0.00	25,479.42	0.00	0.00						
Miami University	1/30/2016	16,199.56	0.00	0.00	0.00						
Pat Ellis CPAs	3/8/2015	0.00	6,499.84	0.00	0.00						
Simms Builders	3/11/2016	4,139.82	0.00	0.00	0.00						
TerraData Inc	1/5/2013	4,699.85	0.00	0.00	18,999.38						
Tyvek Corp	2/3/2016	0.00	0.00	0.00	0.00						
University of Cincinnati	4/29/2013	17,599.17	2,999.75	0.00	9,199.69						
University of Dayton	5/16/2015	0.00	31,199.50	0.00	0.00						
Xavier University	2/21/2014	0.00	3,079.88	0.00	18,069.15						
Totals		73,309.48	104,841.65	25,679.41	46,268.22						

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Figure 3-1

Sales Analysis

By Customer | By Rep | By Item

1 of 1

Find | Next

Name	Added to QB	Current Yr	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
Allison Baker	1/10/2013	8,339.49	9,579.72	0.00	37,068.53						
Frank Ross	1/10/2013	27,031.44	35,583.26	14,579.78	0.00						
Gina Miles	8/14/2013	20,339.38	56,678.92	6,299.79	0.00						
Paul Harris	10/19/2013	17,599.17	0.00	4,799.84	0.00						
Totals		73,309.48	101,841.90	25,679.41	37,068.53						

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Figure 3-2

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The screenshot shows the 'Sales Analysis' window with the 'By Item' report selected. The table contains the following data:

Name	Added to QB	Current Yr	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
AOC 27 LED Monitor	7/7/2013	0.00	6,299.65	1,259.93	3,599.80						
ASUS 24 HDMI LED Monitor	7/7/2013	0.00	0.00	0.00	1,499.90						
Dell 23 LED Monitor	8/4/2013	1,559.87	0.00	0.00	0.00						
Dell OptiPlex	1/7/2013	0.00	0.00	0.00	17,999.70						
HP 23 LED Monitor	8/4/2013	671.93	2,303.76	0.00	0.00						
HP 24 LED Backlit Monitor	8/4/2013	1,819.86	0.00	649.95	0.00						
HP 27 Monitor	3/25/2014	5,999.70	2,799.86	1,399.93	0.00						
HP All-in-one Desktop	5/29/2013	8,279.28	1,799.85	0.00	5,399.54						
HP EliteDesk	5/29/2013	6,119.91	16,319.76	4,759.93	0.00						
HP Pavilion	5/29/2013	10,219.86	11,679.84	0.00	8,029.89						
HP ProDesk 400	8/4/2013	13,299.81	16,799.76	4,899.93	0.00						
HPE Proliant ML150 Tower Server	1/7/2013	0.00	0.00	1,299.99	3,899.97						
HPE Proliant ML350 Server	5/29/2013	3,599.98	1,799.99	0.00	3,599.98						
HPE Proliant ML380 Rack Server	3/25/2014	15,999.98	39,999.95	7,999.99	0.00						
Lenovo ThinkCentre	3/25/2014	3,179.94	2,119.96	2,649.95	0.00						
Logitech Mouse/Keyboard Combo	1/7/2013	2,559.36	2,919.27	759.81	2,239.44						
Totals		73,309.48	104,841.65	25,679.41	46,268.22						

Figure 3-3

You can easily navigate to each report by clicking the appropriate tab at the top of the form.

Each report has interactive sort arrows in the header of each column allowing you to sort the data by any column in ascending or descending order. This allows you to quickly see those customers, reps and/or items with the most sales and least sales for any of the analysis years.

Also note that each report tells you when each customer, sales rep and item was added to QuickBooks. This, along with the trended sales information, is invaluable in assessing longevity and performance.

And to help focus your analysis even more, you can click on any customer or rep name to see their sales totals detailed by item. In this example, the customer name "University of Cincinnati" was clicked on the By Customer report (Figure 3-4).

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Item Details for: University of Cincinnati

Item	Current Year	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
AOC 27 LED Monitor	0.00	0.00	0.00	0.00						
ASUS 24 HDMI LED Monitor	0.00	0.00	0.00	1,499.90						
Dell 23 LED Monitor	0.00	0.00	0.00	0.00						
Dell OptiPlex	0.00	0.00	0.00	5,999.90						
HP 23 LED Monitor	0.00	0.00	0.00	0.00						
HP 24 LED Backlit Monitor	0.00	0.00	0.00	0.00						
HP 27 Monitor	3,199.84	999.95	0.00	0.00						
HP All-in-one Desktop	5,759.50	1,799.85	0.00	0.00						
HP EliteDesk	0.00	0.00	0.00	0.00						
HP Pavilion	0.00	0.00	0.00	0.00						
HP ProDesk 400	0.00	0.00	0.00	0.00						
HPE Proliant ML150 Tower Server	0.00	0.00	0.00	1,299.99						
HPE Proliant ML350 Server	0.00	0.00	0.00	0.00						
HPE Proliant ML380 Rack Server	7,999.99	0.00	0.00	0.00						
Lenovo ThinkCentre	0.00	0.00	0.00	0.00						
Logitech Mouse/Keyboard Combo	639.84	199.95	0.00	399.90						
Total	17,599.17	2,999.75	0.00	9,199.69						

All Items

Figure 3-4

By default, the item detail report initially shows all items, but you can quickly filter this data to show only Sold Items or Unsold Items by clicking the dropdown at the bottom left of the report (Figure 3-5).

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Item Detail

Item Details for: University of Cincinnati

Item	Current Year	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
AOC 27 LED Monitor	0.00	0.00	0.00	0.00						
ASUS 24 HDMI LED Monitor	0.00	0.00	0.00	1,499.90						
Dell 23 LED Monitor	0.00	0.00	0.00	0.00						
Dell OptiPlex	0.00	0.00	0.00	5,999.90						
HP 23 LED Monitor	0.00	0.00	0.00	0.00						
HP 24 LED Backlit Monitor	0.00	0.00	0.00	0.00						
HP 27 Monitor	3,199.84	999.95	0.00	0.00						
HP All-in-one Desktop	5,759.50	1,799.85	0.00	0.00						
HP EliteDesk	0.00	0.00	0.00	0.00						
HP Pavilion	0.00	0.00	0.00	0.00						
HP ProDesk 400	0.00	0.00	0.00	0.00						
HPE Proliant ML150 Tower Server	0.00	0.00	0.00	1,299.99						
HPE Proliant ML350 Server	0.00	0.00	0.00	0.00						
HPE Proliant ML380 Rack Server	7,999.99	0.00	0.00	0.00						
Lenovo ThinkCentre	0.00	0.00	0.00	0.00						
Logitech Mouse/Keyboard Combo	639.84	199.95	0.00	399.90						
Total	17,599.17	2,999.75	0.00	9,199.69						

Figure 3-5

Here is that item detail report filtered for Sold Items (Figure 3-6).

Item Detail

Item Details for: University of Cincinnati

Item	Current Year	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
ASUS 24 HDMI LED Monitor	0.00	0.00	0.00	1,499.90						
Dell OptiPlex	0.00	0.00	0.00	5,999.90						
HP 27 Monitor	3,199.84	999.95	0.00	0.00						
HP All-in-one Desktop	5,759.50	1,799.85	0.00	0.00						
HPE Proliant ML150 Tower Server	0.00	0.00	0.00	1,299.99						
HPE Proliant ML380 Rack Server	7,999.99	0.00	0.00	0.00						
Logitech Mouse/Keyboard Combo	639.84	199.95	0.00	399.90						
Total	17,599.17	2,999.75	0.00	9,199.69						

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Figure 3-6

And here is the same report showing only Unsold Items (Figure 3-7).

Item Details for: University of Cincinnati

Item	Current Year	1 Yr Ago	2 Yrs Ago	3 Yrs Ago	4 Yrs Ago	5 Yrs Ago	6 Yrs Ago	7 Yrs Ago	8 Yrs Ago	9 Yrs Ago
AOC 27 LED Monitor	0.00	0.00	0.00	0.00						
Dell 23 LED Monitor	0.00	0.00	0.00	0.00						
HP 23 LED Monitor	0.00	0.00	0.00	0.00						
HP 24 LED Backlit Monitor	0.00	0.00	0.00	0.00						
HP EliteDesk	0.00	0.00	0.00	0.00						
HP Pavilion	0.00	0.00	0.00	0.00						
HP ProDesk 400	0.00	0.00	0.00	0.00						
HPE ProLiant ML350 Server	0.00	0.00	0.00	0.00						
Lenovo ThinkCentre	0.00	0.00	0.00	0.00						
Total	0.00	0.00	0.00	0.00						

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Unsold Items

Figure 3-7

The sample file here has a limited number of items, so the filtering feature is not that important. But it can be extremely useful when you have hundreds or thousands of items in your Item List.

With all this information at your fingertips, you can quickly and easily determine:

- the customers and sales reps you have been doing business with the longest and their performance over that period of time;
- new customers and sales reps and their performance since coming aboard;
- those customers and sales reps with consistent business levels over the years;
- which products or services your customers are buying or not buying, and which products your sales reps are selling or not selling.