KEY REPORTS GUIDE
Contents

Introduction .................................................................................................................................... 3
Flash Sales........................................................................................................................................ 4
Historical Valuation ......................................................................................................................... 6
Inventory Analysis ........................................................................................................................... 8
Inventory Snapshot ....................................................................................................................... 10
Merchandise Analysis .................................................................................................................... 12
Purchasing Advice ......................................................................................................................... 16
Sales Analysis by Group................................................................................................................. 18
Sales History by Customer by Item .............................................................................................. 22
Sales Rep Productivity................................................................................................................... 24
Six Week Item History .................................................................................................................. 26
Twelve Month Item History ......................................................................................................... 28
Dashboard..................................................................................................................................... 30
INTRODUCTION

CounterPoint is a complete retail management solution that gives you power and control over every aspect of your business—inventory management, point of sale, customer loyalty, purchasing, ecommerce, reporting, and much more.

CounterPoint includes an extensive library of built-in reports.

Each report is designed to give you all the information you need to run your business efficiently and profitably.

All CounterPoint reports are designed using the industry-leading Crystal Reports® engine. You can customize or add information to any CounterPoint report—without having to create a new report from scratch. Report customization requires the Crystal Reports Designer, purchased separately.

KEY REPORTS

This report guide includes an overview of CounterPoint’s key reports as well as Dashboard.

Key reports provide in-depth analysis and “big picture” overviews of your business. They provide the information you need to stay on top of sales trends and inventory.

Dashboard is a powerful reporting tool that provides graphical snapshots of your entire business operation, thresholds, and key performance indicators.

COUNTERPOINT REPORTS

POINT OF SALE REPORTS
- Closed Gift Certificates
- Closed Layaway Journal
- Closed Store Credits
- Drawer Reading
- Drawer Summary
- Gift Certificate List
- Holds
- Layaway Activity
- Layaways
- Open Customer-Specific Purchases
- Order Activity
- Orders
- Pre-Settlement List
- Price Exceptions
- Purge Settlement History
- Quotes
- Reprint Tickets
- Settlement
- Store Credit List
- Ticket Journal
- X-Tape
- Z-Tape

INVENTORY REPORTS
- Adjustments
- Commited Inventory
- Customer Price List
- Historical Valuation*
- Inventory Analysis*
- Inventory History
- Inventory Snapshot*
- Inventory Status
- Item Price List
- Item Price-1 List
- Items
- Items on Sale
- Markdowns
- Merchandise Analysis*
- Physical Count
- Physical Count Worksheet
- Planned Promotions
- Price Rules
- Prices
- Purge Inactive Items
- Quick Transfer Summary
- Quick Transfers
- Recalc Item Quantities
- Reconcile
- Serial Numbers*
- Six Week Item History*
- Stock Status
- Transfer Advice
- Transfer In
- Transfer Out
- Transfer Status
- Twelve Month Item History*
- Valuation

CUSTOMER REPORTS
- Adjustments
- Aging
- Calculate Finance Charges
- Cash Receipts
- Customers
- Finance Charges
- Loyalty Points
- Open and Unposted Documents
- Point Adjustments
- Point History
- Point Redemptions
- Purge Inactive Customers
- Recalc Customer Balances
- Statements

PURCHASING REPORTS
- Customer-specific Purchases
- Purchase Adjustments
- Purchase Orders
- Purchase Requests
- Purchasing Advice*
- Quick Receivings
- Receivings
- Returns to Vendor
- Vendors

SALES HISTORY REPORTS
- Commissions Due
- Flash Sales*
- Management History
- Price Exceptions History
- Purge Ticket History
- Return Tickets
- Sales Analysis by Group*
- Sales History by Customer by Item*
- Sales History by Item by Customer
- Sales History by Sales Rep
- Sales Rep Productivity*
- Tax History
- Tax Exceptions
- Voided Tickets

TIMECARD REPORTS
- Export Timecards
- Purge Timecards
- Timecards Report

SYSTEM REPORTS
- Distributions Report
- Closed Gift Certificates
- Closed Store Credits
- Gift Certificate List
- Interface Distributions
- Purge Distributions
- Store Credit List
- Unvouchered Receivings
- Vouchered Receivings

* Key report
FLASH SALES

- High-level view of store operations
- Time period comparisons
- Pie charts for at-a-glance synopsis

OVERVIEW

The Flash Sales Report provides a brief, one-page synopsis of sales activity for a specified period of time. It summarizes the total sales, number of tickets, average sales amount per ticket, and the gross profit for each store during the reported period and can be used to compare two different time periods.

You can also show percent of total values (e.g., Mall Kiosk was 39% of total sales), or include a pie chart for an at-a-glance understanding of the data.

REPORT PARAMETERS

Flash Sales is a powerful reporting and analysis tool that lets you define and present your own analysis of store operations. You can rank sales, profits, number of tickets, average ticket price, number of returns, quantity sold, discounts, and more.

Select the columns to display on your report: sales, cost, returns, discounts, profit, quantity sold, number of lines, average ticket amount, and more. Use ticket history and store filters to specify additional criteria.
SAMPLE REPORT

All Stores in a One Month Period Ordered by Retail Sales

Order by: Sales (Retail) in period A
Note: All
Dollar amounts are rounded to the nearest dollar.
Quantities are rounded to the nearest integer.
Percentages of total are shown for each value.

<table>
<thead>
<tr>
<th>Store</th>
<th>Period</th>
<th>Sales $Tot</th>
<th>Profit $ %Tot</th>
<th>Profit %</th>
<th># of Items %Tot</th>
<th>Average Retail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Headquarters</td>
<td>A</td>
<td>1,977,355</td>
<td>284,112</td>
<td>14.4</td>
<td>789 10.7</td>
<td>2,500</td>
</tr>
<tr>
<td>Downtown Atlanta</td>
<td>A</td>
<td>1,246,255</td>
<td>153,491</td>
<td>12.3</td>
<td>857 15.9</td>
<td>1,262</td>
</tr>
<tr>
<td>Paseo Center</td>
<td>A</td>
<td>771,310</td>
<td>130,018</td>
<td>17.2</td>
<td>856 22.4</td>
<td>891</td>
</tr>
<tr>
<td>Eastgate Shopping Center</td>
<td>A</td>
<td>376,718</td>
<td>77,116</td>
<td>20.6</td>
<td>227 9.3</td>
<td>1,180</td>
</tr>
<tr>
<td>Alpharetta</td>
<td>A</td>
<td>356,962</td>
<td>73,165</td>
<td>20.8</td>
<td>302 10.3</td>
<td>703</td>
</tr>
<tr>
<td>Atlanta Airport Kiosk</td>
<td>A</td>
<td>199,975</td>
<td>34,281</td>
<td>25.9</td>
<td>217 6.7</td>
<td>681</td>
</tr>
<tr>
<td>West Shore</td>
<td>A</td>
<td>90,942</td>
<td>22,360</td>
<td>24.8</td>
<td>101 2.5</td>
<td>999</td>
</tr>
<tr>
<td>Trinity Commons</td>
<td>A</td>
<td>76,407</td>
<td>22,040</td>
<td>28.3</td>
<td>132 5.3</td>
<td>527</td>
</tr>
<tr>
<td>Fancy Foods Tradestation</td>
<td>A</td>
<td>16,867</td>
<td>2,528</td>
<td>16.0</td>
<td>10 0.5</td>
<td>888</td>
</tr>
<tr>
<td>Natural Foods Expo</td>
<td>A</td>
<td>1,940</td>
<td>184</td>
<td>17.0</td>
<td>2 0.1</td>
<td>624</td>
</tr>
<tr>
<td>Warehouse</td>
<td>A</td>
<td>159</td>
<td>26.0</td>
<td>16.7</td>
<td>19 0.6</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>5,613,181</td>
<td>804,226</td>
<td>16.0</td>
<td>3,818 13.1</td>
<td>1,213</td>
</tr>
</tbody>
</table>

--- End of report ---
HISTORICAL VALUATION

- Inventory value on a particular date
- Pie charts provide at-a-glance synopsis

OVERVIEW

The Historical Valuation Report lets you see the value of your inventory on a specific date. It also allows you to review on-hand quantities, estimated costs, and total retail value for each item, as well as the percentage-to-total ratios for these values.

REPORT PARAMETERS

Analyze individual items or groups of inventory. For individual items, the report indicates retail values as well as the corresponding markup percentages. For groups of items, the report includes quantities, costs, and retail value.

Include all items on the report, or focus the report on the strongest or weakest products in each group. For example, you could identify the top ten categories or the bottom five vendors.

Use item and inventory filters to specify additional criteria for your report—view the value of all items, items from one vendor, or items in a specific category that are stocked at one particular location or all locations.
## SAMPLE REPORT

### Top 5 Categories Ranked by Quantity

**Historical Valuation by Category**

#### Quantity
(Top 10 including ties)

- ORGANIC: 54.2%
- KOSHER: 19.0%
- BAKERY: 11.6%
- CANDY: 7.8%
- INTL: 6.2%
- "Other": 36.0%

#### Date: 3/4/2007

**Analysis by Group**
- Group by Category
- Print: Top 5
- Ranked by: Quantity (shaded)
- Sorted by: Rank
- Valuation date: 03/08/2007
- Locations: ON

**Key**: Category indicates the group includes miscellaneous items; values may not add across the report

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category</th>
<th>Description</th>
<th>Quantity</th>
<th>% of Total</th>
<th>Cost</th>
<th>% of Total</th>
<th>Retail Value</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ORGANIC</td>
<td>Organic</td>
<td>38,586</td>
<td>100</td>
<td>1,068,883</td>
<td>100</td>
<td>1,068,883</td>
<td>100</td>
</tr>
<tr>
<td>2</td>
<td>BAKERY</td>
<td>Bakery</td>
<td>18,286</td>
<td>44</td>
<td>420,000</td>
<td>34</td>
<td>560,000</td>
<td>34</td>
</tr>
<tr>
<td>3</td>
<td>CANDY</td>
<td>Candy and Chocolate</td>
<td>726</td>
<td>2</td>
<td>16,000</td>
<td>1</td>
<td>24,000</td>
<td>1</td>
</tr>
<tr>
<td>4</td>
<td>KOSHER</td>
<td>Kosher Foods</td>
<td>76</td>
<td>0</td>
<td>2,078</td>
<td>0</td>
<td>2,078</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>INTL</td>
<td>International Foods</td>
<td>76</td>
<td>0</td>
<td>1,140</td>
<td>0</td>
<td>1,140</td>
<td>0</td>
</tr>
</tbody>
</table>

---

* Report totals: 58,586 100 1,279,746 100 1,068,883 100

---

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INVENTORY ANALYSIS

- Analyze performance and stocking conditions
- Determine reorders and markdowns

OVERVIEW

The Inventory Analysis Report lets you view inventory activity at the category or item level over a specific date range. Use this report to determine which items should be reordered, marked down, or discontinued.

REPORT PARAMETERS

You can report on overstocked or understocked items and analyze retail value and on-hand profit potential.

Use item filters to specify additional report criteria.
### SAMPLE REPORTS

#### Top 10 Items, Ranked by Quantity On Hand

<table>
<thead>
<tr>
<th>Rank</th>
<th>Item #</th>
<th>Description</th>
<th>Qty on hand</th>
<th>Qty committed</th>
<th>Qty on PO</th>
<th>Retail value</th>
<th>Profit value</th>
<th>Profit %</th>
<th>Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>AOB261</td>
<td>DBL EXPRESS SUPER RICE DREAM</td>
<td>528</td>
<td>0</td>
<td>0</td>
<td>981.20</td>
<td>0.70</td>
<td>87.89</td>
<td>21.30</td>
</tr>
<tr>
<td>2</td>
<td>R20724</td>
<td>COOKBOOK</td>
<td>124</td>
<td>0</td>
<td>0</td>
<td>3,216.60</td>
<td>3,310.00</td>
<td>100.00</td>
<td>0.00</td>
</tr>
<tr>
<td>3</td>
<td>A165 WM</td>
<td>DANTE B HOLOGIC</td>
<td>22</td>
<td>0</td>
<td>0</td>
<td>173.70</td>
<td>175.30</td>
<td>100.00</td>
<td>0.06</td>
</tr>
<tr>
<td>4</td>
<td>R20744</td>
<td>LOFT L respective GULQUGH</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>123.04</td>
<td>124.00</td>
<td>100.00</td>
<td>0.06</td>
</tr>
<tr>
<td>5</td>
<td>P000295</td>
<td>RJ 70 185</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>64.00</td>
<td>54.00</td>
<td>100.00</td>
<td>0.06</td>
</tr>
</tbody>
</table>

--- End of report ---

#### Top 5 Categories, Ranked by Quantity Sold

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category Description</th>
<th>Qty on hand</th>
<th>Qty committed</th>
<th>Qty on PO</th>
<th>Retail value</th>
<th>Profit value</th>
<th>Profit %</th>
<th>Invoice</th>
<th>Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ORGANIC</td>
<td>544</td>
<td>0</td>
<td>0</td>
<td>1,015.84</td>
<td>934.84</td>
<td>93.48</td>
<td>31.00</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>PRODUCE</td>
<td>151</td>
<td>0</td>
<td>0</td>
<td>3,474.06</td>
<td>3,593.20</td>
<td>96.77</td>
<td>8.00</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Fruits and Vegetables</td>
<td>11</td>
<td>0</td>
<td>0</td>
<td>221.09</td>
<td>221.05</td>
<td>100.00</td>
<td>1.09</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Nuts</td>
<td>7</td>
<td>2</td>
<td>0</td>
<td>1,610.60</td>
<td>1,615.10</td>
<td>99.74</td>
<td>0.06</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Books</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0.60</td>
<td>0.60</td>
<td>100.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

--- End of report ---
INVENTORY SNAPSHOT

- Summary of what you sold, owned, and ordered
- Quickly review quantities for items and locations

OVERVIEW

The Inventory Snapshot Report lets you see either a detailed or summarized list of ‘What I sold,’ ‘What I own,’ and ‘What I have on order.’ This report allows you to quickly review the quantity on hand, quantity on PO, and quantity sold values for your items and locations. It provides a simple snapshot of the current status and sales history of your inventory.

REPORT PARAMETERS

Choose from several different report formats: Item Summary, Item-Location Detail, or Location-Item Detail.

Use the item and inventory filters to limit the items that appear on the report.
SAMPLE REPORTS

Summary of All Items in the Candy Category Ordered by Inventory Value

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Inv Val</th>
<th>Qty on Hand</th>
<th>Qty on PO</th>
<th>Qty on</th>
<th>% on</th>
<th>Whse CH</th>
</tr>
</thead>
<tbody>
<tr>
<td>41C3253915</td>
<td>12 Piece Butterscotch Truffle</td>
<td>200.00</td>
<td>111</td>
<td>12</td>
<td>1</td>
<td>50.0</td>
<td>62.1</td>
</tr>
<tr>
<td>F015658</td>
<td>Royal Truffle Assortment - Large</td>
<td>500.00</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
<td>62.7</td>
</tr>
<tr>
<td>AM4101205</td>
<td>Original 4oz Belgian Chocolate Sea Shells</td>
<td>552.00</td>
<td>217</td>
<td>2</td>
<td>2</td>
<td>15.0</td>
<td>65.6</td>
</tr>
<tr>
<td>AM4101403</td>
<td>50 Piece Chocolate Box</td>
<td>500.00</td>
<td>5</td>
<td>1</td>
<td>1</td>
<td>16.7</td>
<td>60.7</td>
</tr>
<tr>
<td>F01568788</td>
<td>Nirvana Chocolate 1lb Assorted Truffles</td>
<td>500.00</td>
<td>15</td>
<td>1</td>
<td>1</td>
<td>5.0</td>
<td>34.3</td>
</tr>
<tr>
<td>DEA101059</td>
<td>Cherry Cordial Popcorn Tin</td>
<td>776.00</td>
<td>24</td>
<td>1</td>
<td>1</td>
<td>0.7</td>
<td>55.0</td>
</tr>
<tr>
<td>DEA101058</td>
<td>Grand Gourmet Caramel</td>
<td>470.00</td>
<td>10</td>
<td>3</td>
<td>2</td>
<td>16.7</td>
<td>65.7</td>
</tr>
<tr>
<td>F0156244</td>
<td>Chocolate Avalanche Popcorn Tin</td>
<td>150.00</td>
<td>15</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
<td>32.2</td>
</tr>
<tr>
<td>F0156457</td>
<td>10 Piece Father's Day Chocolate Medley</td>
<td>120.00</td>
<td>20</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
<td>62.2</td>
</tr>
<tr>
<td>AR101058</td>
<td>Dark Chocolate Covered Pizzettes</td>
<td>92.00</td>
<td>24</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
<td>21.1</td>
</tr>
<tr>
<td>F0156175</td>
<td>Chocolate Covered Pretzels</td>
<td>56.00</td>
<td>0</td>
<td>5</td>
<td>0</td>
<td>50.0</td>
<td>78.2</td>
</tr>
<tr>
<td>DEA101034</td>
<td>2 Piece Chocolo'd Event Favor</td>
<td>46.00</td>
<td>0</td>
<td>1</td>
<td>1</td>
<td>0.0</td>
<td>62.0</td>
</tr>
</tbody>
</table>

Location-Item Detail for Items from a Specific Vendor

<table>
<thead>
<tr>
<th>Location</th>
<th>EAST</th>
<th>Item #</th>
<th>Description</th>
<th>Inv Val</th>
<th>Qty on Hand</th>
<th>Qty on PO</th>
<th>Qty on</th>
<th>% on</th>
<th>Whse CH</th>
</tr>
</thead>
<tbody>
<tr>
<td>WEST</td>
<td></td>
<td>41C3253915</td>
<td>12 Piece Butterscotch Truffle</td>
<td>552.00</td>
<td>217</td>
<td>2</td>
<td>2</td>
<td>15.0</td>
<td>65.6</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1002516</td>
<td>Dark Chocolate Covered Pizzettes</td>
<td>92.00</td>
<td>24</td>
<td>0</td>
<td>0</td>
<td>0.0</td>
<td>21.1</td>
</tr>
</tbody>
</table>

Date: 3/12/2007  Time: 10:19:45AM | Page 7

Reported: 01/01/2006 to 01/31/2006 (31 days)
Item / Item category between CANDY and CANDY
Inventory Location is (except): 010R and
G1 value not equal to 003
Order by: Inv Sales, Item #
**MERCHANDISE ANALYSIS**

- Hot/Cold analysis
- Determine buying opportunities and markdowns
- More than 180 fields to choose from

**OVERVIEW**

The *Merchandise Analysis Report* lets you see the current state and the past performance of your inventory. Use this report to determine when to take advantage of opportunistic buys and which items to mark down.

**REPORT PARAMETERS**

The report allows ranking of categories, items, or vendors and can be based on a variety of figures, including retail calculations such as turn rate and gross margin return on investment.

Select which columns to display from over 180 available choices. Use the Item and Inventory tabs to filter the information that appears on the report.
## SAMPLE REPORTS

### Top 10 Items Ranked by Quantity Sold

#### Merchandise Analysis by Item number

**City on hnd**

*Top 10 including ties*

**Vendor**

**Rank** | **Item number** | **Description** | **Qty on hnd** | **Qty on PO** | **Reg qty** | **Vendor #** | **Category/Brand** | **Profit %** | **OMROI %** | **Reg. Pro. %** | **Mkt share %** | **Mkt %** | **Vendor %** | **Reg. Vendor %** | **Vendor %** | **Reg. Vendor %** |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FARM</td>
<td>8</td>
<td>BOS94889</td>
<td>Organic Apple Butter</td>
<td>4</td>
<td>6</td>
<td>3</td>
<td>FARM</td>
<td>JAM/Organic</td>
<td>29</td>
<td>33.3</td>
<td>1.6</td>
<td>0.1</td>
<td>0.1</td>
<td>1.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>FARM totals</td>
<td>4</td>
<td>6</td>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td>29</td>
<td>33.3</td>
<td>1.6</td>
<td>0.1</td>
<td>0.1</td>
<td>1.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HORIZON</td>
<td>3</td>
<td>FR4654790</td>
<td>Horizon Organic 2% Milk</td>
<td>6</td>
<td>0</td>
<td>2</td>
<td>HORIZON</td>
<td>DARY/Organic</td>
<td>29</td>
<td>33.3</td>
<td>17.7</td>
<td>7.2</td>
<td>33.7</td>
<td>1.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HORIZON totals</td>
<td>6</td>
<td>0</td>
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<td></td>
<td></td>
<td></td>
<td>29</td>
<td>33.3</td>
<td>17.7</td>
<td>7.2</td>
<td>33.7</td>
<td>1.7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMY</td>
<td>1</td>
<td>FR175866</td>
<td>Fire Roasted Vegetable Salad</td>
<td>10</td>
<td>2</td>
<td>1</td>
<td>AMY</td>
<td>CONT/SALSA</td>
<td>22</td>
<td>55</td>
<td>44.8</td>
<td>19.2</td>
<td>24.6</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>AMY totals</td>
<td>10</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td>22</td>
<td>55</td>
<td>44.8</td>
<td>19.2</td>
<td>24.6</td>
<td>2.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HARRY DAV</td>
<td>4</td>
<td>GEA65249</td>
<td>Organic Fruit Basket, Assorted</td>
<td>6</td>
<td>0</td>
<td>10</td>
<td>HARRY DAV</td>
<td>PROD/DEPT</td>
<td>29</td>
<td>76.9</td>
<td>19.5</td>
<td>19.9</td>
<td>19.9</td>
<td>19.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>HARRY DAV totals</td>
<td>6</td>
<td>0</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
<td>29</td>
<td>76.9</td>
<td>19.5</td>
<td>19.9</td>
<td>19.9</td>
<td>19.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NATURE</td>
<td>9</td>
<td>KTA96965</td>
<td>Fresh Raw Peanuts In Shell</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>NATURE</td>
<td>NUTS/ASSST</td>
<td>13</td>
<td>40.3</td>
<td>4.3</td>
<td>0.7</td>
<td>16.3</td>
<td>9.0</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Notes:*
- Analyze by Item
- Rank Top 10
- Report includes miscellaneous items; values may not add across the report.
- Vendors: FARM, HORIZON, AMY, HARRY DAV, NATURE
Top 10 Vendors Ranked by Number of Transactions

<table>
<thead>
<tr>
<th>Rank</th>
<th>Primary vendor</th>
<th>Vendor name</th>
<th># of transactions</th>
<th>Qty sold</th>
<th>Sales</th>
<th>Cost of Sales</th>
<th>Profit</th>
<th>Profit%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NATURE</td>
<td>Nature Way</td>
<td>100,227</td>
<td>251,946</td>
<td>1,296,714</td>
<td>1,234,947</td>
<td>159,767</td>
<td>13.5</td>
</tr>
<tr>
<td>2</td>
<td>NATURE</td>
<td>Nature Value</td>
<td>47,822</td>
<td>59,080</td>
<td>552,380</td>
<td>486,262</td>
<td>116,118</td>
<td>17.0</td>
</tr>
<tr>
<td>3</td>
<td>HORIZON</td>
<td>Horizon</td>
<td>36,878</td>
<td>116,957</td>
<td>486,464</td>
<td>551,970</td>
<td>113,776</td>
<td>24.4</td>
</tr>
<tr>
<td>4</td>
<td>AMYS</td>
<td>Amy’s Kitchen</td>
<td>29,254</td>
<td>1140,428</td>
<td>796,942</td>
<td>832,172</td>
<td>112,470</td>
<td>15.0</td>
</tr>
<tr>
<td>5</td>
<td>HEBB</td>
<td>Hebb Pharm</td>
<td>23,207</td>
<td>50,178</td>
<td>332,863</td>
<td>336,560</td>
<td>86,213</td>
<td>8.2</td>
</tr>
<tr>
<td>6</td>
<td>CASTAFARM</td>
<td>Canadian Farms</td>
<td>25,811</td>
<td>11,251</td>
<td>406,456</td>
<td>452,270</td>
<td>66,720</td>
<td>17.5</td>
</tr>
<tr>
<td>7</td>
<td>RED MILL</td>
<td>Red Mill</td>
<td>17,375</td>
<td>88,124</td>
<td>336,543</td>
<td>336,540</td>
<td>61,943</td>
<td>15.0</td>
</tr>
<tr>
<td>8</td>
<td>EZEK</td>
<td>Ezekiel</td>
<td>17,173</td>
<td>46,171</td>
<td>192,968</td>
<td>187,811</td>
<td>49,357</td>
<td>15.1</td>
</tr>
<tr>
<td>9</td>
<td>EDEN</td>
<td>Eden Foods</td>
<td>16,849</td>
<td>3,261</td>
<td>20,167</td>
<td>16,965</td>
<td>3,192</td>
<td>18.8</td>
</tr>
<tr>
<td>10</td>
<td>EARTH</td>
<td>Earth Friendly</td>
<td>15,232</td>
<td>17,038</td>
<td>136,360</td>
<td>137,367</td>
<td>20,322</td>
<td>29.0</td>
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* Sales total: 342,803, 930,438, 5,286,927, 4,492,980, 779,009, 14.8

--- End of report ---

Historical Retail Value by Category

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category</th>
<th>Description</th>
<th>Bag roll Retail received</th>
<th>Roll of roll</th>
<th>Roll of adj</th>
<th>Retail trancheage</th>
<th>End roll</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Grocery</td>
<td>2,036</td>
<td>6,400</td>
<td>4,167</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>1</td>
<td>Supplement</td>
<td>1,444</td>
<td>2,463</td>
<td>2,861</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>1</td>
<td>Dried</td>
<td>2,440</td>
<td>2,440</td>
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<td>0</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>Produce</td>
<td>1,051</td>
<td>1,051</td>
<td>0</td>
<td>0</td>
<td>520</td>
</tr>
<tr>
<td>5</td>
<td>1</td>
<td>Bulk</td>
<td>764</td>
<td>1,821</td>
<td>1,387</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>1</td>
<td>Chill</td>
<td>553</td>
<td>1,765</td>
<td>1,175</td>
<td>0</td>
<td>0</td>
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<tr>
<td>7</td>
<td>1</td>
<td>Frozen</td>
<td>243</td>
<td>929</td>
<td>501</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>8</td>
<td>1</td>
<td>Cosmetics</td>
<td>400</td>
<td>884</td>
<td>564</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>9</td>
<td>1</td>
<td>Natural Living</td>
<td>1</td>
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<td>164</td>
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<td>0</td>
</tr>
<tr>
<td>10</td>
<td>1</td>
<td>Bulk Herbs</td>
<td>10</td>
<td>20</td>
<td>10</td>
<td>0</td>
<td>0</td>
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</tbody>
</table>

* Sales total: 9,550, 14,410, 14,411, 0 | 0 | 10,495

--- End of report ---
PURCHASING ADVICE

- Automatically calculates and creates restocking orders
- Based on Maximum or Replenishment method
- Create one PO for all locations or separate PO’s for each location

OVERVIEW

The Purchasing Advice Report calculates quantities to reorder based on current inventory levels, commitments, backorders, in-transit merchandise, open PO’s, desired stocking levels, vendor multiples, and/or vendor minimum order requirements.

Purchasing Advice calculates reorder quantities using one of the following methods:

- **Maximum**—Orders an item up to its desired maximum stocking level when it falls to or below its minimum (reorder) level. Minimum and maximum levels are defined for each item at each location. For gridded items, levels can be defined for each cell (color/size/pattern).
- **Replenishment**—Orders enough of an item to replace what was sold during a specified time period.

REPORT PARAMETERS

Automatically calculate and create restocking orders for one or more locations.
## SAMPLE REPORT

### Maximum Calculation Method

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor #</th>
<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000000020</td>
<td>CHIP TORTILLA FLOWERS</td>
<td>NATUREBEST</td>
<td>412205</td>
</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor #</th>
<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000000241</td>
<td>CHIP TOT BLUE LIPS</td>
<td>NATUREBEST</td>
<td>412205</td>
</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
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</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>20</td>
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<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor #</th>
<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000000251</td>
<td>ORGANIC BR BREW</td>
<td>NATUREBEST</td>
<td>919107</td>
</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>10</td>
<td>0</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor #</th>
<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000000252</td>
<td>EXTRA GINGER BREW</td>
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<td>919107</td>
</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>15</td>
<td>0</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
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<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000000253</td>
<td>SPICED APPLE BREW</td>
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</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
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<tr>
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<td>0.8000</td>
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</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor #</th>
<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000000272</td>
<td>RICE SNAP TAMARI SERV</td>
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</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor #</th>
<th>Vendor's Item #</th>
</tr>
</thead>
<tbody>
<tr>
<td>10000000278</td>
<td>HOT STUFF</td>
<td>NATUREBEST</td>
<td>919444</td>
</tr>
<tr>
<td>Location</td>
<td>Avg</td>
<td>Last</td>
<td>Qty on PO</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>40</td>
<td>0.8000</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>
SALES ANALYSIS BY GROUP

- Define your own analysis of store operations
- Choose from over 120 different groupings
- Analyze historical or theoretical sales

OVERVIEW

The Sales Analysis by Group Report is a powerful reporting and analysis tool that lets you define and present dozens of different analyses of historical ticket sales—with or without pie charts.

Choose from more than 120 different groupings, including item number, item category, customer zip code, customer category, customer profile fields, user, store, vendor, hour of the day, and many more. For gridded items, you can track sales by cell (color/size/pattern) within categories/subcategories or for specific item numbers.

Display up to three reporting periods for each group. You can print all members of a group or, for example, just the top 10 members. You can run the report for one or more days, for one or more stores, and for a multitude of other criteria. You can even view theoretical sales—as if all goods had been sold at the retail price.

REPORT PARAMETERS

Sales Analysis by Group lets you define and present your own analysis of store operations.
Use the standard columns, or select to print up to eleven analysis columns from a list that includes sales, cost, profit, profit percent, quantity sold, number of lines, average ticket amount, etc. Use filters to limit the report to particular tickets (or stores, customers, stations, etc.) and/or particular items (or categories, vendors, etc.). You can also use filters to limit the group members (e.g., only categories A, B, and C).

SAMPLE REPORTS

Top Three Customers Ranked by Sales
## Top 20 Vendors, Ordered by Profit $

<table>
<thead>
<tr>
<th>Vendor Description</th>
<th>Rank</th>
<th>Period</th>
<th>Sales % of Total</th>
<th>Profit % of Total</th>
<th>Profit % of Total</th>
<th># of Tickets</th>
<th>Average Ticket</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yersky's</td>
<td>1</td>
<td>A</td>
<td>156  11.8</td>
<td>76  11.1</td>
<td>56.5</td>
<td>2</td>
<td>70</td>
</tr>
<tr>
<td>WholeCo West</td>
<td>2</td>
<td>A</td>
<td>44   3.3</td>
<td>44   0.2</td>
<td>100.0</td>
<td>0</td>
<td>6</td>
</tr>
<tr>
<td>White Wave, Inc.</td>
<td>3</td>
<td>A</td>
<td>175 13.2</td>
<td>175 24.6</td>
<td>100.0</td>
<td>27</td>
<td>5</td>
</tr>
<tr>
<td>VITAMIN E</td>
<td>4</td>
<td>A</td>
<td>156 12.0</td>
<td>66   7.6</td>
<td>35.5</td>
<td>0</td>
<td>20</td>
</tr>
<tr>
<td>Vitantrl</td>
<td>5</td>
<td>A</td>
<td>1   0.1</td>
<td>1   0.1</td>
<td>100.0</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Vibe Health</td>
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<td>A</td>
<td>80  6.1</td>
<td>74  10.4</td>
<td>92.5</td>
<td>0</td>
<td>27</td>
</tr>
<tr>
<td>Vibrant Health</td>
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<td>A</td>
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<td>21  2.6</td>
<td>100.0</td>
<td>1</td>
<td>21</td>
</tr>
<tr>
<td>Uninutrit</td>
<td>8</td>
<td>A</td>
<td>28  2.1</td>
<td>6  1.0</td>
<td>33.3</td>
<td>1</td>
<td>28</td>
</tr>
<tr>
<td>Ultimate Life</td>
<td>9</td>
<td>A</td>
<td>4  0.3</td>
<td>4  0.6</td>
<td>100.0</td>
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<td>4</td>
</tr>
<tr>
<td>Triples</td>
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<td>13  1.0</td>
<td>3  0.4</td>
<td>21.7</td>
<td>1</td>
<td>13</td>
</tr>
<tr>
<td>Triples</td>
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<td>A</td>
<td>355 27.5</td>
<td>156 19.5</td>
<td>38.2</td>
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<td>20</td>
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<tr>
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<td>55  8.8</td>
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<td>53</td>
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<td>4  0.6</td>
<td>100.0</td>
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<td>4</td>
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<td>A</td>
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<td>-78 -11.0</td>
<td>-297.3</td>
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<tr>
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<td>32  4.6</td>
<td>100.0</td>
<td>0</td>
<td>5</td>
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<tr>
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<td>A</td>
<td>52  3.9</td>
<td>52  7.0</td>
<td>100.0</td>
<td>14</td>
<td>4</td>
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<tr>
<td>Triples</td>
<td>17</td>
<td>A</td>
<td>80  6.1</td>
<td>80  11.2</td>
<td>100.0</td>
<td>17</td>
<td>6</td>
</tr>
<tr>
<td>Triples</td>
<td>18</td>
<td>A</td>
<td>16  1.2</td>
<td>-62 -8.7</td>
<td>-53.5</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>Triples</td>
<td>19</td>
<td>A</td>
<td>21  1.6</td>
<td>6  1.1</td>
<td>37.0</td>
<td>1</td>
<td>31</td>
</tr>
<tr>
<td>Triples</td>
<td>20</td>
<td>A</td>
<td>8  0.6</td>
<td>8  1.1</td>
<td>100.0</td>
<td>1</td>
<td>8</td>
</tr>
</tbody>
</table>

Report Totals:

- 20 groups

Sales: $1,282

Average Ticket: $71.2

Profit: $54.0

--- End of report ---
## Most Profitable Hours of the Day

### Sales Analysis by Hour of Day

**Sales - Period A**
(Top 10 including ties)

![](image)

<table>
<thead>
<tr>
<th>Hour of Day Description</th>
<th>Rank</th>
<th>Period</th>
<th>Sales</th>
<th>% Tot</th>
<th>Profit $</th>
<th>% Tot</th>
<th>Profit %</th>
<th>% Tot</th>
<th># of Transactions</th>
<th>Average Ticket</th>
</tr>
</thead>
<tbody>
<tr>
<td>12:00</td>
<td>1</td>
<td>A</td>
<td>3,918</td>
<td>6.4</td>
<td>3,752</td>
<td>1.1</td>
<td>54.6</td>
<td>2</td>
<td>0.3</td>
<td>1,955</td>
</tr>
<tr>
<td>11:00</td>
<td>2</td>
<td>A</td>
<td>57,740</td>
<td>9.5</td>
<td>7,501</td>
<td>2.0</td>
<td>51.3</td>
<td>28</td>
<td>2.9</td>
<td>1,348</td>
</tr>
<tr>
<td>10:00</td>
<td>3</td>
<td>A</td>
<td>41,464</td>
<td>6.6</td>
<td>7,938</td>
<td>2.2</td>
<td>45.4</td>
<td>360</td>
<td>52.5</td>
<td>1,224</td>
</tr>
<tr>
<td>09:00</td>
<td>4</td>
<td>A</td>
<td>384,131</td>
<td>6.1</td>
<td>60,525</td>
<td>8.6</td>
<td>32.5</td>
<td>365</td>
<td>56.7</td>
<td>1,796</td>
</tr>
<tr>
<td>08:00</td>
<td>5</td>
<td>A</td>
<td>325,471</td>
<td>5.1</td>
<td>58,800</td>
<td>8.7</td>
<td>19.8</td>
<td>230</td>
<td>24.7</td>
<td>285</td>
</tr>
</tbody>
</table>

**Report Total:**
- **Groups:** A
- **Total Sales:** 1,082,784
- **Total Sales Value:** 185,206
- **Average Ticket:** 17.2
- **Total Transactions:** 969

---

End of report
SALES HISTORY BY CUSTOMER BY ITEM

- Analyze sales based on customers
- Identify items sold to customers

OVERVIEW

The Sales History by Customer by Item Report shows selected customers and the items that they purchased, along with the applicable sales, quantities, profitability, and percent-of-totals figures. Run the report for a selected range of items, customers, stores, dates, categories, or any other reportable criteria.

REPORT PARAMETERS

Analyze what merchandise is being sold and who is purchasing that merchandise.

Use the ticket history and item filters to limit which tickets and items appear on the report.
# SAMPLE REPORT

## Sales History by Customer by Item, Printed in Order by Customer Name

**CounterPoint Solution for Specialty Foods**

**Key Reports Guide**

### Sales History by Customer by Item

<table>
<thead>
<tr>
<th>Customer #</th>
<th>Name</th>
<th>Description</th>
<th>Qty Sold</th>
<th>Qty Sold B</th>
<th>Quantity</th>
<th>Price</th>
<th>Gmt Pts</th>
<th>Gmt Pts B</th>
<th>Cost</th>
<th>Cost B</th>
<th>Percent of Total</th>
<th>Percent of Total B</th>
</tr>
</thead>
<tbody>
<tr>
<td>10062</td>
<td>Amanda Jones</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>TOTALS</strong></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10420</td>
<td>Betty Tasker</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>TOTALS</strong></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10962</td>
<td>Kevin Drake</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>TOTALS</strong></td>
<td></td>
<td></td>
<td></td>
<td>6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Date:** 3/16/2007  **Time:** 11:20:05 AM  **Page 1 of 1**
SALES REP PRODUCTIVITY

- Motivate and reward employee performance
- Identify profitable time periods

OVERVIEW

The Sales Rep Productivity Report allows managers to monitor the productivity of sales reps in units and dollars sold per hour. This report is useful for identifying and motivating sales reps with poor performance or for rewarding superior performance.

REPORT PARAMETERS

You can generate the report for a particular sales rep or for an entire store. You can also specify one or two date ranges for the report, allowing you to compare sales rep productivity during specific periods.

Use the user and ticket history filters to limit which users and tickets are included on the report.
### SAMPLE REPORTS

#### Productivity Ordered by Sales Rep Name

<table>
<thead>
<tr>
<th>Sales Rep</th>
<th>Sales</th>
<th>% of Total</th>
<th>City sold</th>
<th>% of Total</th>
<th>Store sold</th>
<th>% of Total</th>
<th>Sales/Air</th>
<th>Qty/Air</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amanda Jones</td>
<td>3,000.18</td>
<td>0.7</td>
<td>490.0</td>
<td>1.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Beverly Jones</td>
<td>14,191.95</td>
<td>2.9</td>
<td>2,130.0</td>
<td>5.2</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Brenda Daniels</td>
<td>524.25</td>
<td>0.1</td>
<td>98.0</td>
<td>0.2</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Christina Tippet</td>
<td>45.05</td>
<td>0.0</td>
<td>11.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Dave Watters</td>
<td>2,041.90</td>
<td>0.4</td>
<td>562.0</td>
<td>1.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Gary Douglas</td>
<td>4,042.83</td>
<td>0.9</td>
<td>1,030.0</td>
<td>2.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Hall Franken</td>
<td>21,556.72</td>
<td>4.4</td>
<td>7,712.0</td>
<td>19.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Hank Smith</td>
<td>3,175.94</td>
<td>0.6</td>
<td>2,113.0</td>
<td>5.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Hillary Hall</td>
<td>149,473.37</td>
<td>29.4</td>
<td>6,130.0</td>
<td>15.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>House</td>
<td>587.00</td>
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<td>10.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Howard Marks</td>
<td>82,271.13</td>
<td>16.4</td>
<td>8,020.0</td>
<td>20.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Jo Casillo</td>
<td>117,845.48</td>
<td>23.4</td>
<td>4,708.0</td>
<td>11.7</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Internet</td>
<td>2,182.48</td>
<td>0.4</td>
<td>193.0</td>
<td>0.4</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Larry Crump</td>
<td>1,785.50</td>
<td>0.3</td>
<td>222.0</td>
<td>0.5</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Nora Highwater</td>
<td>59.03</td>
<td>0.0</td>
<td>7.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Sara James</td>
<td>230.93</td>
<td>0.0</td>
<td>40.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Travel Station 1</td>
<td>10,276.97</td>
<td>2.0</td>
<td>200.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Travel Station 2</td>
<td>12,287.00</td>
<td>2.2</td>
<td>484.0</td>
<td>1.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>Vince Aims</td>
<td>8,457.85</td>
<td>1.6</td>
<td>929.0</td>
<td>2.2</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

**Report totals:** 585,798.56 | 100.0 | 37,097.0 | 100.0 | 0.0 | 0.0 | 0.0 | 0.0

--- End of report ---

### Productivity Grouped by Store with Store Totals Only

<table>
<thead>
<tr>
<th>Store</th>
<th>Sales Rep</th>
<th>Sales</th>
<th>% of Total</th>
<th>City sold</th>
<th>% of Total</th>
<th>Store sold</th>
<th>% of Total</th>
<th>Sales/Air</th>
<th>Qty/Air</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALL</td>
<td></td>
<td>115,840.59</td>
<td>35.0</td>
<td>11,271.0</td>
<td>42.1</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>DISTR</td>
<td></td>
<td>172,559.51</td>
<td>51.6</td>
<td>13,297.0</td>
<td>40.7</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>WEB</td>
<td></td>
<td>43,732.39</td>
<td>13.4</td>
<td>2,212.0</td>
<td>9.2</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
<td>0.0</td>
</tr>
</tbody>
</table>

**Report totals:** 354,130.69 | 100.0 | 28,780.0 | 100.0 | 0.0 | 0.0 | 0.0 | 0.0

--- End of report ---
SIX WEEK ITEM HISTORY

Spot sales trends
Evaluate item performance over six weeks

OVERVIEW
The *Six Week Item History Report* lets you see item performance and sales trends for specific six week periods.

The report includes a useful summary of the past 26 weeks, including the date each item was first received, the quantity received, and the percentage of inventory sold during that period. Further, the report indicates the quantities sold at retail and off retail (or the basis you specify). Finally, the report indicates the current on-hand and on-order quantities, as well as the projected number of weeks of on-hand inventory, for each item.

REPORT PARAMETERS
Specify the basis for reporting the quantities sold off the specified price.

Use filters to limit the items that appear on the report.
## SAMPLE REPORT

### Six Week History Based on Regular Price

| Date: 5/22/2007 | Time: 12:40:05PM |

**Reporting period:** Six weeks beginning 4/16/07 and ending 5/22/07

**Duty sold per week is based on regular price**

**Key Reports Guide**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Description</th>
<th>Vendor name</th>
<th>Category</th>
<th>Item reg pro</th>
<th>MU%</th>
<th>Item Pro 1</th>
<th>MU%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000088</td>
<td>PINEAPPLE STRAWBERRY MUFFIN</td>
<td>DELI/BAKERYCOM</td>
<td>3.99</td>
<td>1.99</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000087</td>
<td>PIZZA GREEK</td>
<td>DELI/BAKERYCOM</td>
<td>3.99</td>
<td>2.99</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000086</td>
<td>PIZZA SUNDAY &amp; KARTI</td>
<td>DELI/BAKERYCOM</td>
<td>3.99</td>
<td>2.99</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000085</td>
<td>CHILI RICE BEANS</td>
<td>DELI/HOTFOOD</td>
<td>3.29</td>
<td>3.29</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Six Week Item History**

- **Item #:** 1000088
- **Description:** PINEAPPLE STRAWBERRY MUFFIN
- **Vendor:** DELI/BAKERYCOM
- **Category:**
- **Item reg pro:** 3.99
- **MU%:**
- **Item Pro 1:** 1.99
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
- **Onhand:**
- **Onorder:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **Item History:**
- **6 Week:**
- **8 Week:**
- **ct:**
- **MU%:**
- **Item Pro 1:**
- **MU%:**
TWELVE MONTH ITEM HISTORY

Spot sales trends
Evaluate item performance over 12 months

OVERVIEW
The Twelve Month Item History Report is designed to help buyers evaluate item performance and spot sales trends over specific twelve-month periods.

REPORT PARAMETERS
The report indicates the quantity sold for a twelve month period as well as a useful summary of the date each item was first received, the quantity received, and the percentage of inventory sold. The report also indicates quantities sold at retail and off retail (or the basis you specify). Finally, the report indicates the current on-hand and on-order quantities for each item, as well as the projected number of weeks of on-hand inventory.

Use item and inventory filters to limit which items, locations, categories, etc. appear on the report.
### SAMPLE REPORTS

#### Brief Format

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/5/2007</td>
<td>12:26:26AM</td>
<td>1</td>
</tr>
</tbody>
</table>

**CountertPoint Solution for Specialty Foods**

**Key Reports Guide**

**SAMPLE REPORTS**

**Brief Format**

<table>
<thead>
<tr>
<th>Item V</th>
<th>Description</th>
<th>Vendor name</th>
<th>Category/Subcat</th>
<th>Item avg</th>
<th>Qty</th>
<th>Item avg</th>
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<td>Item 4</td>
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</tbody>
</table>

**Item 1**: Original Orange
- Vendor: Nature's Best
- Category: Grocery / Sundaes
- Item Avg: 6.66
- Qty: 29

**Item 2**: Juice Berry Hectar
- Vendor: Nature's Best
- Category: Grocery / Juice
- Item Avg: 9.88
- Qty: 55

**Item 3**: Coffee Dark Decaf
- Vendor: Nature's Best
- Category: Grocery / Teacoffe
- Item Avg: 11.99
- Qty: 75

**Item 4**: Orange Honey
- Vendor: Miller
- Category: Grocery / Jam & Jelly
- Item Avg: 8.88
- Qty: 65

**Item 5**: Water Glass Bottle
- Vendor: Southern Wares, Inc.
- Category: Grocery / Water
- Item Avg: 9.88
- Qty: 55

**Item 6**: Apricot
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Energy Bar
- Item Avg: 1.66
- Qty: 45

**Item 7**: Chocolate Almond Fun
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Energy Bar
- Item Avg: 1.66
- Qty: 40

**Item 8**: Iced Chocolat Choc
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Candy
- Item Avg: 1.66
- Qty: 85

**Item 9**: Bar Choc Pecan Pie
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Energy Bar
- Item Avg: 1.66
- Qty: 10

**Item 10**: Bar Dulce De Leche
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Energy Bar
- Item Avg: 1.66
- Qty: 40

**Item 11**: Build Bar Choc
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Energy Bar
- Item Avg: 1.66
- Qty: 10

**Item 12**: Build Bar Choc
- Vendor: Sun Ole Distributors, Inc.
- Category: Grocery / Energy Bar
- Item Avg: 1.66
- Qty: 40

---

**Note**: The table above contains sample data for various items, including their quantities and averages. This is a simplified representation of a report format.
**Dashboard**

Bird’s eye view of entire business operation
Graphical snapshot of Key Performance Indicators
Effectively measure, monitor, and manage performance

**Overview**

**Dashboard** is an enhanced reporting tool that provides clear and concise graphical snapshots of your entire business operation. With **Dashboard**, you can monitor Key Performance Indicators (KPIs) so you can see how your business is performing.

**Dashboard** is available beginning with V8.3.6.

**Dashboard Views**

**Dashboard** includes at-a-glance views of the following areas:

- Day
- Period
- Company
- Store
- Vendor
- Product

Dashboard’s views allow you to monitor your business by the time increments that are meaningful to you—hour, day, week-to-date, period-to-date, month-to-date, or year-to-date—and compare current time periods to previous periods. View trends based on raw numbers (e.g., number of tickets, sales dollars, etc.) or by calculated numbers (e.g., profit percent, average margin, average ticket sale). You can view your entire company, a particular store, or drill down to a specific category, vendor, or item.

**Sample Views**

**Day View**

The Day View shows daily activity for the date selected.

**Key Performance Indicators:**

- Number of tickets
- Sales dollars
- Profit amount
- Profit percent
- Average ticket amount
- Discount percent
- Average number of items per ticket
- Sales trends by hour of the day for sales dollars and number of tickets
**Period View**

The Period View shows performances for the week to date, month to date, period to date, season to date, and year to date for the periods ending on the selected date.

**Key Performance Indicators:**

- Number of tickets
- Sales dollars
- Profit amount
- Average ticket amount
- Discount percent
- Performance by period (includes month-to-date, season-to-date, and year-to-date comparisons of sales dollars, number of tickets, and profit for this year and last year)
- Trend graph includes the sales dollars and profit amount for the selected period of time
Company View

The Company View shows sales and profit for the entire company over a 12 month period.

Key Performance Indicators:

- Day, month-to-date, and year-to-date comparisons for this year and last year for the number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket
- 12 month trend graph for each KPI (number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket)
- Top ten categories based on sales dollars and profit for the last six weeks
**Store View**

The Store View compares sales and profit performance at the store level.

- **Store View**

**Key Performance Indicators:**

- Store rankings for the day, month, and year based on how it changed compared to the previous year
- For each store, drill down to view the number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket for this year and last year
- Top ten categories for each store for the last six weeks
- 12 month trend graph for each KPI (number of tickets, sales dollars, profit amount, profit percent, average ticket amount, and the number of items per ticket)
Vendor View
The Vendor View compares vendor performance and graphs sales trends.

Key Performance Indicators:
- Vendor rankings by sales and profit for the last month
- For each vendor, drill down to view that vendor's best selling and most profitable items
- 12 month trend graph based on sales and profit margin
Product View
The Product View includes the best selling items and how they contribute to gross profits.

Key Performance Indicators:
- Top ten categories for each store for the last six weeks
- Individual items that contributed to the top ten categories
- Top 20 items ranked by profit contribution
- 12 month trend graph based on sales and gross profit