Advanced Multi-Dimensional Sales Analysis

Initial Release

Prepared by Jae Sen
AUTO COUNT SDN BHD

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1.0 Revision History

Rev.	Version	Update Date	Modified By	Remark
0	2.0.0.5	31/10/2019	Jae Sen	Initial Release

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J-TECH SYSTEM

2.0 Introduction

Advanced Multi-Dimensional Sales Analysis is built to allow better analysis on sales data which includes most of the **User Defined Fieds (UDFs)** from maintenance and transactions. This function as an upgrade to **Multi-Dimensional Sales Analysis Module**.

2.1 System Requirement

- AutoCount Accounting 2.0 Basic Edition and above
- AutoCount Accounting 2.0 Revision 123 and above (Recommended)

2.2 Installation

1. Launch AutoCount Accounting 2.0 and login the account book that wish to install this plug-in.
2. From the top Menu, go to **Tools → Plug-in Manager**.
3. Plug-in Manager screen will appear, click on the **"Install"** button located on the right side. System will prompt to select a file. Browse for the related **.app file**.
4. A new window will prompt with some basic information of this plug-in. Click on the **"Install"** button again to proceed.
5. A confirmation message will prompt after that. Click **"Yes"** to confirm the installation.
6. A success message will appear after the plug-in is installed correctly.

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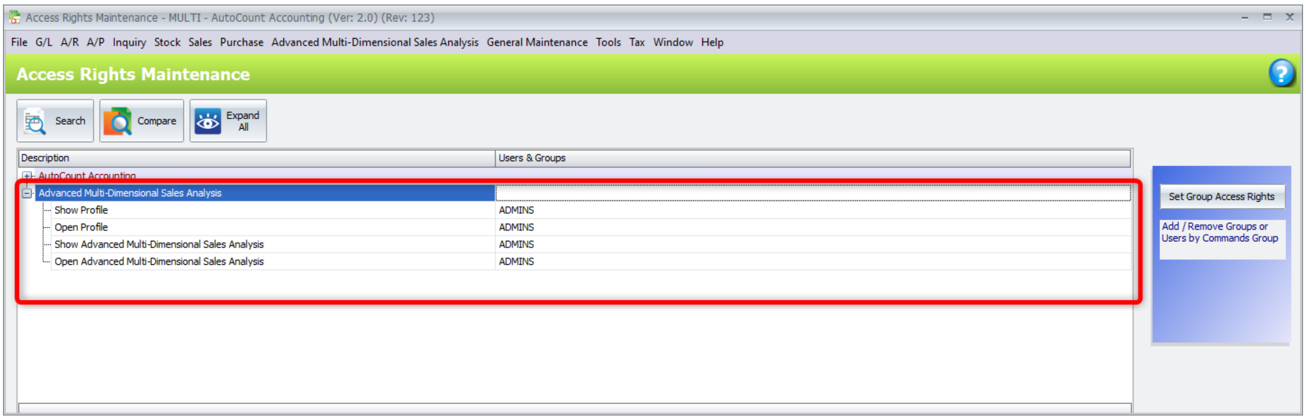
3.0 Access Right

There will be new access right added once user had installed this plug-in. User can browse these access rights from top **Menu → General Maintenance → Access Rights Maintenance**. User will be able to see new record **"Advanced Multi-Dimensional Sales Analysis"** with several new access rights.



Access Right	Description
Show Profile	To show Profile Menu
Open Profile	Allow to open Profile
Show Advanced Multi-Dimensional Sales Analysis	To show Advanced Multi-Dimensional Sales Analysis Menu
Open Advanced Multi-Dimensional Sales Analysis	Allow to open Advanced Multi-Dimensional Sales Analysis

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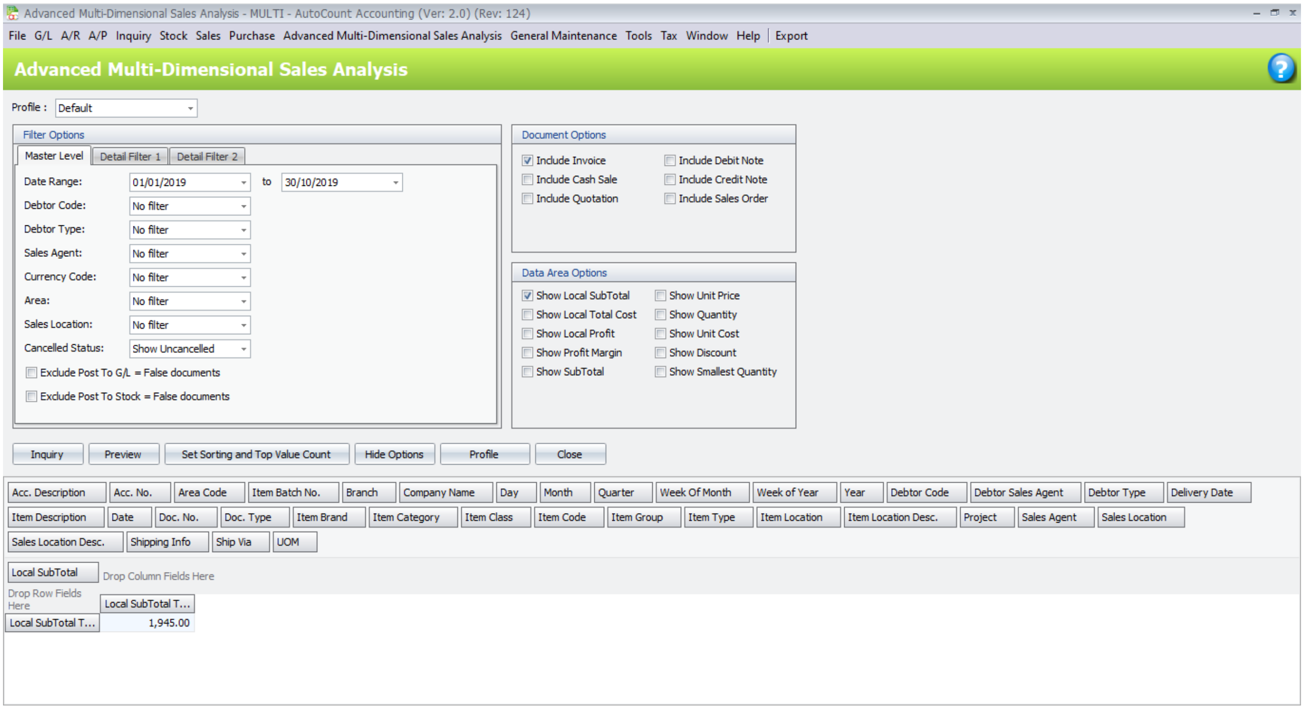
4.0 Function & Feature

4.1 Advanced Multi-Dimensional Sales Analysis

This function allows user to flexibility define **Multi-Dimensional Sales Analysis Report by Profile**. Report layout can also be exported to Excel, PDF formats for other purposes. This function can be found at **Menu → Advanced Multi-Dimensional Sales Analysis → Advanced Multi-Dimensional Sales Analysis**.



Options

Profile: To select profile to reflect profile settings on the report.

Filter Options: Allows user to filter by some basic fields.

Document Options: Allows user to filter report results to include which document type.

Data Area Options: Allows user to view report by certain columns, usually figure or amount based.

Functional Buttons

Inquiry: Click to calculate results based on filters.

Preview: Preview results in paper form, can be used to print or export to different format.

Set Sorting and Top Value Count: To set sorting by selected columns and Top Value Count by selected columns. Top Value Count here means to capture only the top "x" numbers of result for that column.

Example if user have total of 10 Sales Agent, the Top Value Count is set to 3, the result will then only show the top 3 Sales Agent

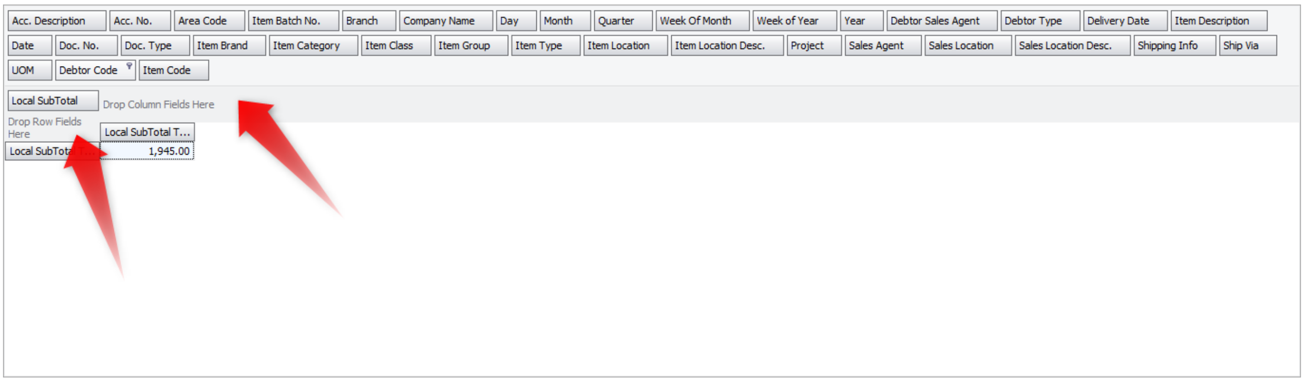
Hide Options: Hide top section Options area to provide more spacing to view report.

Profile: Quick access to Profile.

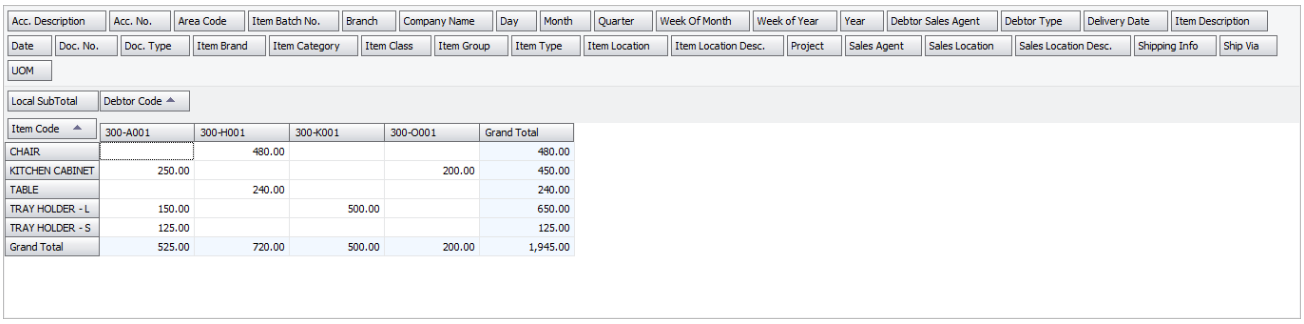
Close: Close Advanced Multi-Dimensional Sales Analysis.

Using Advanced Multi-Dimensional Sales Analysis

User can filter based on own requirements, then click on the **"Inquiry"** button to calculate the results. After that, user can drag and drop any columns that they wish to see at the result section. There are 2 areas – **X (Row)** and **Y (Column)** where the user can drag those columns and place it.

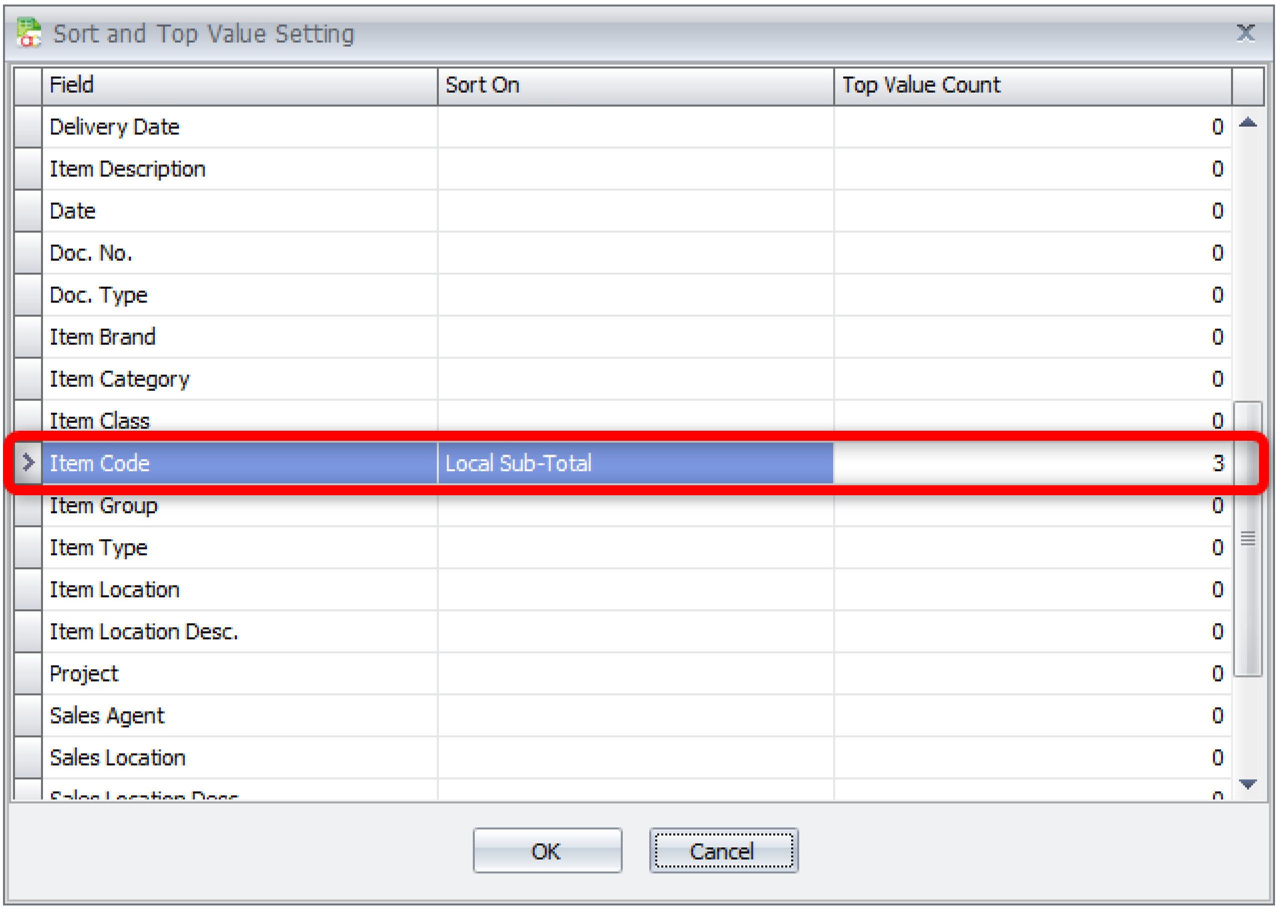


An example of Item Code at X and Debtor Code at Y



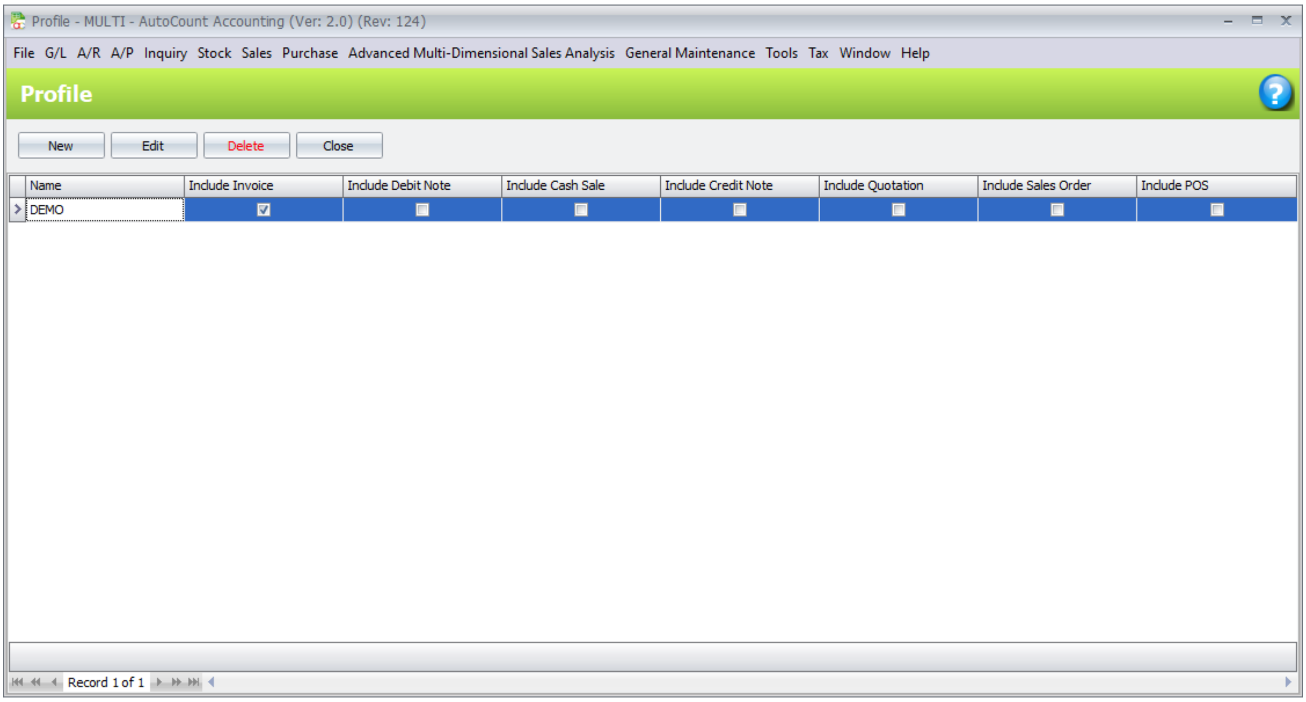
Item Code	300-A001	300-H001	300-K001	300-O001	Grand Total
CHAIR		480.00			480.00
KITCHEN CABINET	250.00			200.00	450.00
TABLE		240.00			240.00
TRAY HOLDER - L	150.00		500.00		650.00
TRAY HOLDER - S	125.00				125.00
Grand Total	525.00	720.00	500.00	200.00	1,945.00

An example of setting Sorting and Top Count Value by Item Code by 3. System will automatically capture the top 3 or lowest 3 item code based on the Local Sub Total.



4.2 Profile

User can setup **profile** in this **Advanced Multi-Dimensional Sales Analysis**. The purpose of the profile is to **pre-set a template of columns** that the user wants to populate into the report. Usually this is needed if the default columns at Advanced Multi-Dimensional Sales Analysis is insufficient for the user or user wish to have a pre-set template at the report. User can find Profile at **Menu → Advanced Multi-Dimensional Sales Analysis → Profile**.



Functional Buttons

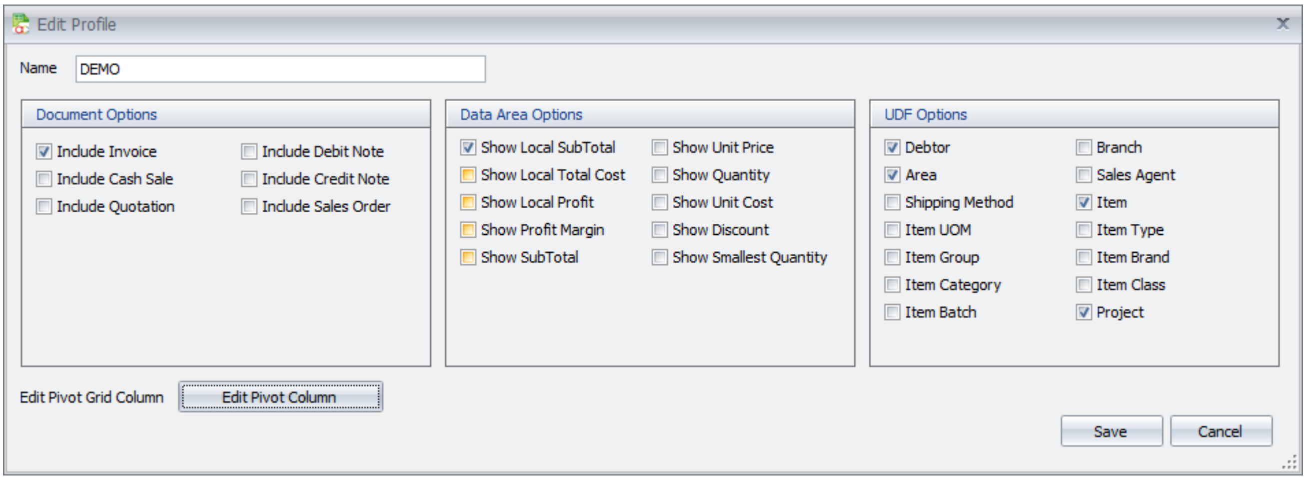
New: Create new profile

Edit: Edit selected profile

Delete: Delete selected profile

Close: Close Profile screen

User may create a new profile from the Profile screen by clicking the **"New"** button. A new dialog box will appear for user to setup the profile default settings. User may provide a name for this profile at the **"Name"** column.



Option Area

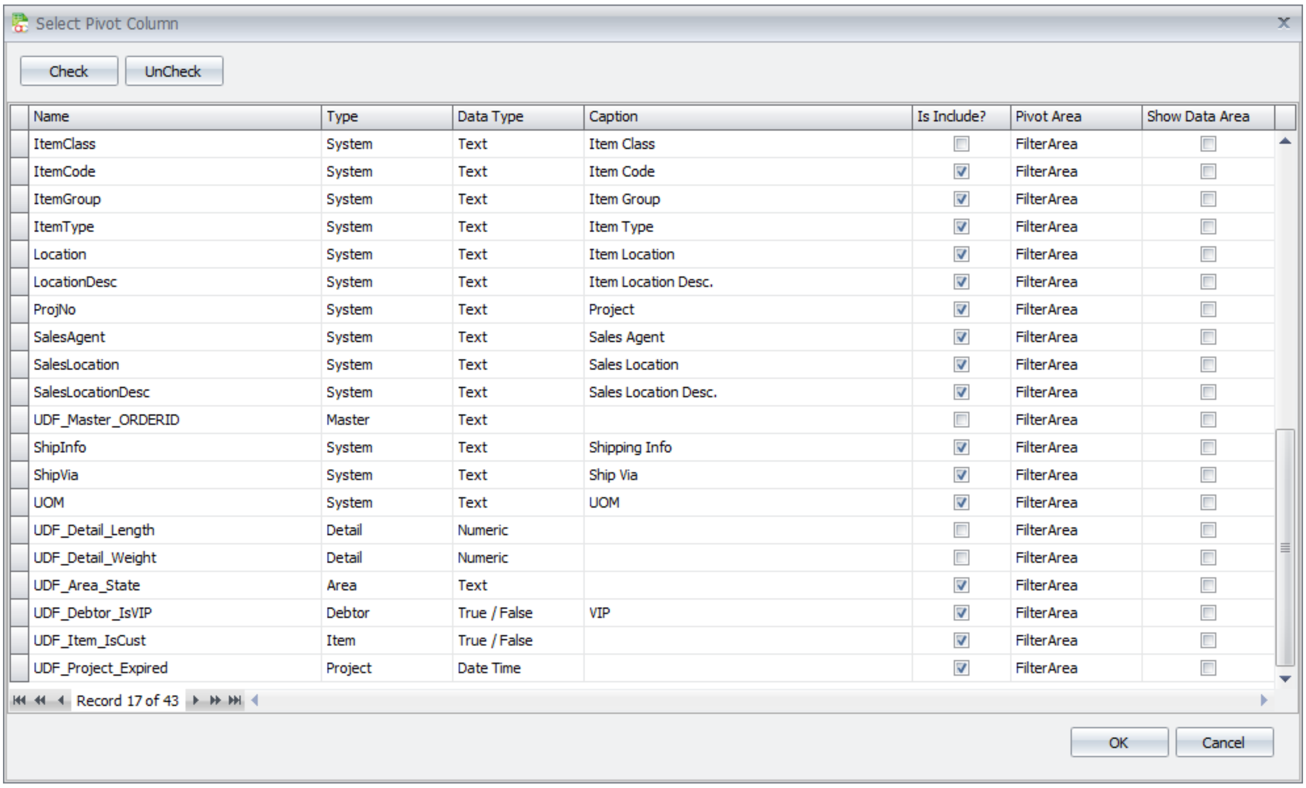
Document Options: To pre-set to include which document type as default. Also, to include the document type UDFs in report, meaning UDFs that is created under that document, both Master and Detail.

Data Area Options: To pre-set to tick or untick the available columns in Data Area.

UDF Options: To include which Master's UDF into the report. For example, if there are UDFs created under Debtor and user wish to show it in the report, will have to tick on the Debtor.

Edit Pivot Column

This function is to pre-set which column user wants to show at the report. This function provides the flexibility to user to maintain which fields or columns to be shown at the report. Such flexibility is provided due to the large numbers of fields and columns, especially after including UDFs.



Select Pivot Column

Check UnCheck

Name	Type	Data Type	Caption	Is Include?	Pivot Area	Show Data Area
ItemClass	System	Text	Item Class	☐	FilterArea	☐
ItemCode	System	Text	Item Code	☑	FilterArea	☐
ItemGroup	System	Text	Item Group	☑	FilterArea	☐
ItemType	System	Text	Item Type	☑	FilterArea	☐
Location	System	Text	Item Location	☑	FilterArea	☐
LocationDesc	System	Text	Item Location Desc.	☑	FilterArea	☐
ProjNo	System	Text	Project	☑	FilterArea	☐
SalesAgent	System	Text	Sales Agent	☑	FilterArea	☐
SalesLocation	System	Text	Sales Location	☑	FilterArea	☐
SalesLocationDesc	System	Text	Sales Location Desc.	☑	FilterArea	☐
UDF_Master_ORDERID	Master	Text		☐	FilterArea	☐
ShipInfo	System	Text	Shipping Info	☑	FilterArea	☐
ShipVia	System	Text	Ship Via	☑	FilterArea	☐
UOM	System	Text	UOM	☑	FilterArea	☐
UDF_Detail_Length	Detail	Numeric		☐	FilterArea	☐
UDF_Detail_Weight	Detail	Numeric		☐	FilterArea	☐
UDF_Area_State	Area	Text		☑	FilterArea	☐
UDF_Debtor_IsVIP	Debtor	True / False	VIP	☑	FilterArea	☐
UDF_Item_IsCust	Item	True / False		☑	FilterArea	☐
UDF_Project_Expired	Project	Date Time		☑	FilterArea	☐

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OK Cancel

Functional Buttons

Check: To check or include selected field or column from report

Uncheck: To uncheck or exclude selected field or column from report

Fields

Name: Column Name as Database Column

Type: Source or type of columns. Explanation as below

Type	Explanation
System	Usually refers to the original columns of the system
Master or Detail	Usually refers t the UDFs created at Document Level. Example Invoice Master UDF, Invoice Detail UDF
Others	Usually refers to the source of UDFs being created. Example Item means the UDFs is created under Item

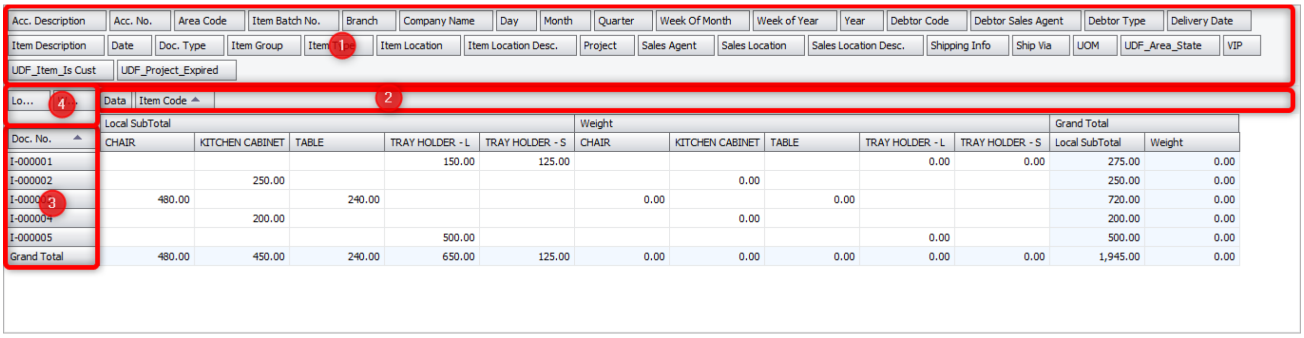
Data Type: Column Data Type.

Caption: Caption of the column as presented in report.

Is Include?: To show column at report.

Pivot Area: Select the default placement of the column, between

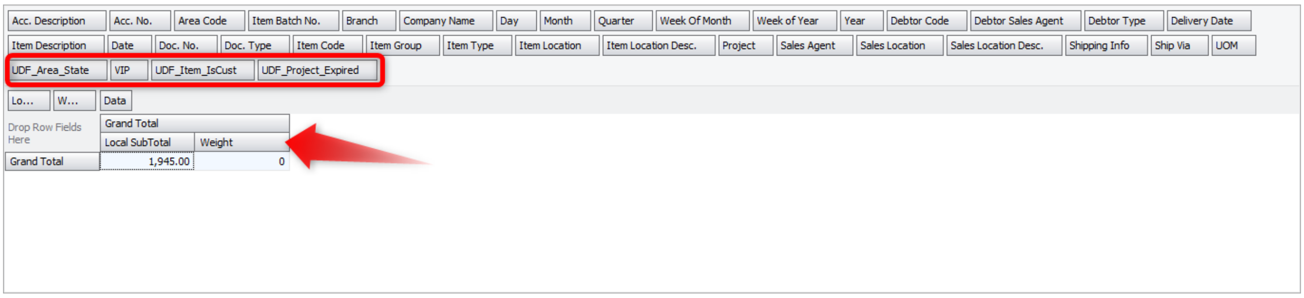
1. Row Area
2. Column Area
3. Filter Area
4. Data Area



Show Data Area: Only available for columns that able to set Data Area on Pivot Area.

After setup all the settings, user can click on the **"Save"** button to save the Profile. User may go back to Advanced Multi-dimensional Sales Analysis, choose on the **Profile Name** that the user had set, and then those UDF columns as set will appear according to profile setting.

If there is any different caption, the system will also refer to the caption first, else will use the column name to present in the report.


Acc. Description
Acc. No.
Area Code
Item Batch No.
Branch
Company Name
Day
Month
Quarter
Week Of Month
Week of Year
Year
Debtor Code
Debtor Sales Agent
Debtor Type
Delivery Date
Item Description
Date
Doc. No.
Doc. Type
Item Code
Item Group
Item Type
Item Location
Item Location Desc.
Project
Sales Agent
Sales Location
Sales Location Desc.
Shipping Info
Ship Via
UOM
UDF_Area_State
VIP
UDF_Item_IsCust
UDF_Project_Expired
Lo...
W...
Data
Drop Row Fields Here
Grand Total
Local SubTotal
Weight
Grand Total
1,945.00
0