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AutoCount Multi-Dimensional Analysis Module

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MULTI DIMENSIONAL SALES ANALYSIS

1.0 Introduction

This module allows user to flexibly define Multi-Dimensional Sales/Purchase/GL Analysis Report. Report layout can then be exported to Excel, PDF and Rich Text format. AutoCount Multi-Dimensional Analysis is a specialized software feature designed for detailed financial reporting and analysis. It empowers users to create tailored reports by considering multiple dimensions simultaneously, such as products, customers, time periods, and sales regions. This allows for a comprehensive understanding of financial data, revealing insights and trends that might go unnoticed with traditional single-dimensional analysis. Users can flexibly design and customize reports to suit their specific needs, and these reports can be exported to formats like Excel, PDF, and Rich Text for easy sharing and presentation. By offering insights into sales, purchases, and general ledger data, AutoCount Multi-Dimensional Analysis becomes a valuable tool for informed decision-making and strategic planning within businesses and organizations.



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2.0 Features

1. Go to **Sales > Multi Dimensional Sales Analysis** .
2. Click on **Inquiry**.

The screenshot shows the 'Multi-Dimensional Sales Analysis' window in the AutoCount Accounting software. The interface includes several panels and a data table. Five callouts provide instructions:

- 1. All these fields can be drag and drop into 'Drop Column/Row Fields Here'**: Points to the table header area containing fields like Doc. T, Debtor Code, Branch, Week Of Month, Serial No., Doc. No., Sales Agent, Debtor Sales Agent, Debtor Type, Area Code, Sales Location, Item Code, UOM, Item Type, Item Group, Item Brand, Item Category, Item Class, Batch No., Project, Department, Year, Month, Item Description, Quarter, Week of Year, Acc. No., Ship Via, Shipping Info, Day, Date, Item Description 2, QT Status, Branch Name, and Main Supplier.
- 2. Data Area Options: to be displayed in columns**: Points to the 'Data Area Options' panel with checkboxes for 'Show Local SubTotal', 'Show Local Total Cost', 'Show Local Profit', 'Show Profit Margin', 'Show SubTotal', 'Show Smallest Quantity', 'Show Unit Price', 'Show Quantity', 'Show Unit Cost', 'Show Discount', and 'Show FOC Qty'.
- 3. Set the date range and other filter options.**: Points to the 'Filter Options' panel, specifically the 'Date Range' dropdown set to '01-10-2023' to '09-10-2023'.
- 4. Check to exclude documents that not yet post to G/L**: Points to the 'Exclude Post To G/L = False documents' checkbox in the 'Filter Options' panel.
- 5. Click on inquiry**: Points to the 'Inquiry' button in the toolbar.



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3. Drag and drop **Sales Agent** field onto **Row**, and **Month** onto **Column**,
The analysis layout will look like this,
(remember that value displayed is Local Sub-Total)

The screenshot shows the 'Multi-Dimensional Sales Analysis' window. The 'Filter Options' section includes fields for Date Range (01-01-2017 to 10-11-2017), Debtor Code, Debtor Type, Sales Agent, Currency Code, Area, Sales Location, and Cancelled Status. The 'Document Options' section includes checkboxes for Include Invoice, Include Cash Sale, Include Quotation, Include Debit Note, Include Credit Note, and Include Sales Order. The 'Data Area Options' section includes checkboxes for Show Local SubTotal, Show Local Total Cost, Show Local Profit, Show Profit Margin, Show SubTotal, Show Smallest Quantity, Show Unit Price, Show Quantity, Show Unit Cost, and Show Discount.

Below the options are buttons for Inquiry, Preview, Set Sorting and Top Value Count, Hide Options, and Close.

The main data area shows a pivot table with columns for Sales Agent and months (September, October, November, Grand Total). Annotations with yellow callouts point to the 'Month' field in the column headers and the 'Sales Agent' field in the row headers.

Local SubTotal	Month	September	October	November	Grand Total
Sales Agent	CINDY		2,500.00		2,500.00
JS		2,500.00			2,500.00
TAN				3,500.00	3,500.00
TEH				3,300.00	3,300.00
Grand Total		2,500.00	2,500.00	6,800.00	11,800.00



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4. Click on **Set Sorting and Top Value Count** .

Multi-Dimensional Sales Analysis - MOBILE PHONE TRADING 2014 [V2 HELP FILE] - AutoCount Accounting (Ver: 2.0) (Rev: 61)

File G/L A/R A/P Inquiry Stock Sales Purchase Bonus Point Business Flow General Maintenance Tools GST Window Help | Export Layout

Multi-Dimensional Sales Analysis

Filter Options

Master Filter: Detail Filter 1 | Detail Filter 2

Date Range: 01-01-2017 to 10-11-2017

Debtor Code: No filter

Debtor Type: No filter

Sales Agent: No filter

Currency Code: No filter

Area: No filter

Sales Location: No filter

Cancelled Status: Show Uncancelled

Exclude Post To G/L = False documents

Document Options

Include Invoice Include Debit Note

Include Cash Sale Include Credit Note

Include Quotation Include Sales Order

Data Area Options

Show Local SubTotal Show Unit Price

Show Local Total Cost Show Quantity

Show Local Profit Show Unit Cost

Show Profit Margin Show Discount

Show SubTotal

Show Smallest Quantity

Click on the "Set Sorting and Top Value Count"

Inquiry
Preview
Set Sorting and Top Value Count
Hide Options
Close

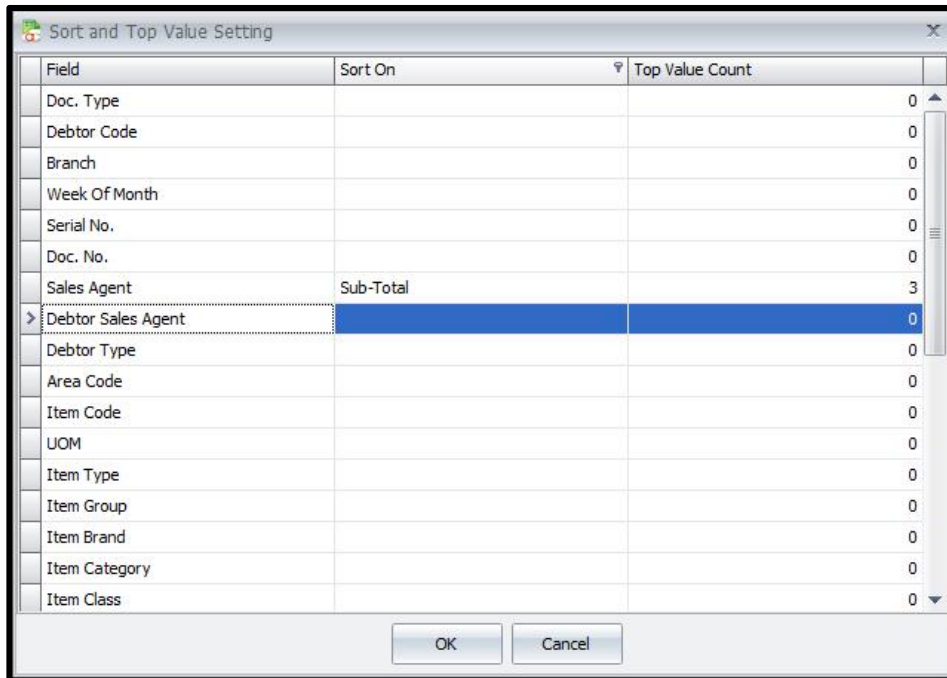
Doc. Type	Debtor Code	Branch	Week Of Month	Serial No.	Doc. No.	Debtor Sales Agent	Debtor Type	Area Code	Sales Location	Item Code	UOM
Item Type	Item Group	Item Brand	Item Category	Item Class	Company Name	Item Location	Item Batch No.	Project	Department	Year	Item Description
Quarter	Week of Year	Acc. No.	Ship Via	Shipping Info	Day	Date	Item Description 2				
Local SubTotal Month ▲											
Sales Agent ▲											
	September	October	November	Grand Total							
CTNDY		2,500.00		2,500.00							
JS	2,500.00			2,500.00							
TAN			3,500.00	3,500.00							
TEH			3,300.00	3,300.00							
Grand Total	2,500.00	2,500.00	6,800.00	11,800.00							



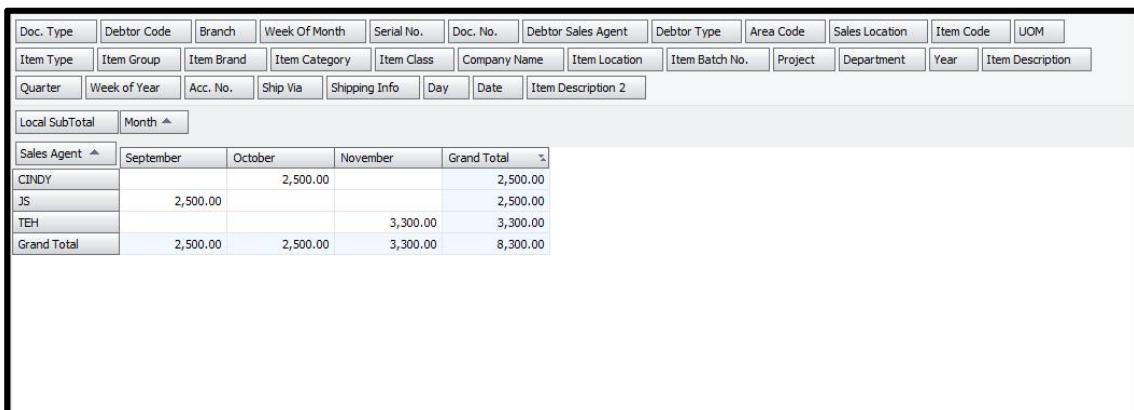
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- Select field **Sales Agent**, sort on **Sub-Total** (means to sort Sales Agent based on total sales), and set **Top Value Count** to **3** (means to display only top 3 sales agents based on total sales).
- Click on **OK**.



- You may drag and drop more fields onto row/column for additional analysis.





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- 8. For example, drag and drop **Company Name** field onto **Row** next to **Sales Agent**.
- 9. Drag and drop **Item Type** field onto **Column** next to **Month**.
- 10. Drag and shift so that Item Type is placed before Month.

The screenshot shows the 'Multi-Dimensional Sales Analysis' window. The interface includes filter options, document options, and data area options. The main data table is annotated with yellow callouts:

- A callout points to the 'Company Name' field in the 'Sales Agent' row, with the text: "Drag and drop 'Company Name' field onto Row".
- A callout points to the 'Item Type' field in the 'Month' column, with the text: "Drag and drop 'Item Type' field onto Column".

Month	Item Type	September	October	November	Grand Total
	LG	LG	LG	LG	
Sales Agent	Company Name				
CINDY	DOCTOR MOBILE ZONE		2,500.00		2,500.00
JS	AUTO COUNT SDN BHD	2,500.00			2,500.00
TEH	CASH SALES CUSTOMER			3,300.00	3,300.00
Grand Total		2,500.00	2,500.00	3,300.00	8,300.00



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11. By clicking on **Export** menu, you may send/export the layout to other format such as Excel, PDF, RTF.

The screenshot shows the 'Multi-Dimensional Sales Analysis' window. The 'Export' menu is open, showing options: 'Export To Microsoft Excel', 'Export To PDF', 'Export To MHT', 'Export To Rtf', and 'Export To Text'. A yellow callout box points to the 'Export' menu with the text 'Click "Export"'. The main window contains filter options, document options, and data area options. Below these are buttons for 'Inquiry', 'Preview', 'Set Sorting and Top Value Count', 'Hide Options', and 'Close'. The main data area displays a table with columns for Doc. Type, Debtor Code, Branch, Week Of Month, Serial No., Doc. No., Debtor Sales Agent, Debtor Type, Area Code, Sales Location, Item Code, and UOM. A summary table is also visible at the bottom of the data area.

Month	September	October	November	Grand Total
Local SubTotal				
Sales Agent				
CINDY		2,500.00		2,500.00
JS	2,500.00			2,500.00
TEH			3,300.00	3,300.00
Grand Total	2,500.00	2,500.00	3,300.00	8,300.00



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12. By clicking on **Layout** menu, you may Save/Load the layout or Load the default layout:

The screenshot shows the 'Multi-Dimensional Sales Analysis' window. The 'Layout' menu is open, and a yellow callout bubble points to it with the text 'Click "Layout"'. The menu options are 'Load Layout From File', 'Save Layout To File', and 'Load Default Layout'. The main window contains several sections: 'Filter Options' with fields for Date Range, Debtor Code, Debtor Type, Sales Agent, Currency Code, Area, Sales Location, and Cancelled Status; 'Document Options' with checkboxes for Include Invoice, Include Cash Sale, Include Quotation, Include Debit Note, Include Credit Note, and Include Sales Order; and 'Data Area Options' with checkboxes for Show Local SubTotal, Show Local Total Cost, Show Local Profit, Show Profit Margin, Show SubTotal, Show Unit Price, Show Quantity, Show Unit Cost, Show Discount, and Show Smallest Quantity. Below these are buttons for Inquiry, Preview, Set Sorting and Top Value Count, Hide Options, and Close. A data table is visible at the bottom with columns for Sales Agent, Company Name, and Grand Total.

Local SubTotal	Month	Item Type	Grand Total
	September	October	November
Sales Agent	Company Name	LG	LG
CINDY	DOCTOR MOBILE ZONE		2,500.00
JS	AUTO COUNT SDN BHD	2,500.00	
TEH	CASH SALES CUSTOMER		3,300.00
Grand Total	2,500.00	2,500.00	3,300.00