



1.1.1 Stop Analysis Report: Visited Customers

Availability: Individually Configured for each Workstation.

Menu Path: Accounting / Report / Stop Analysis.

Page: 1 Date: Mar 12/02

PalmX Route Accounting
Stop Analysis Report by Cost Center
Cost Center (CC): 051 with Admin Entries
for Dates: Dec 3/01
Visited Customers - Sales Details

Cost Center	Description	Groups	Last Sync
051	MARIO LENNING	051	01/02/2002

Mon, Dec. 3/01

Custno	Company	Route	Time	Sales	GM%	Prior Visit
100468	SMITHS AMOCO	7022-N	051 11:01	237.65	38.05	Last visited by 999 on Nov 29/01
101864	CENTRALIA CITGO	W005	051 11:24	31.50	25.71	Nov 12/01

Visited Customers :	2	269.15	31.87
Total Visited for CC 051 :	2	269.15	31.87
Report - Total Visited :	2	269.15	31.87

The Visited Customers section of the Stop Analysis Report provides management with the information to track their employee’s sales by Route (customer group), or by Cost Center (mobile). This report includes detailed information of all sales transactions including stop times, transaction totals, average gross margin, and number of customers visited. The following numbered list corresponds with the respective label in the above figure for further detailed explanation:

1. **Report By**
 - a) Access to the Stop Analysis Report is provided through the Accounting/Report/Stop Analysis menu path. From here the user can choose to print the report based on a Route or Cost Center. For this example Cost Center has been selected.
 - b) The user selects whether they wish to report on one Route or Cost Center, a range of Routes or Cost Centers, or All. The selected range of either ‘Route’ or ‘Cost Center’ will appear on this title line. For this example Cost Center ‘051’ has been selected.
 - c) The user can choose to include transactions created in Si Business Central. These transactions are included if the SAR configuration option ‘Admin Entries’ is set to ‘Y’. For this example, administrative entries are included.
2. **Report Dates**
The report date range will print on this line. If the date range only includes one day, then only that date will print. If a range is selected, the start and end dates will print.
3. **Report Sub-Title**

The sub-title line displays the section of the SAR you are looking at. Depending on the SAR configuration by the user, the report can print 'Visited Customers', 'Missed Customers' or 'Summary'.

4. 'Route/Cost Center' Information

This line is where the information on the 'Route' or 'Cost Center' is printed.

5. Date

This line is where the Date is printed.

6. Customer Information

- a) If a customer has been visited, then they will be included here, ordered by time of visit for the day as defined by the date (See #5).
- b) Sales information for the stop will be included if the user has set the SAR configuration option 'Sales Analysis' to 'Y'.
- c) The date that the Customer was last visited, the 'Prior Visit', is printed here. If the customer was last visited by the same 'Route/Cost Center' as the report is currently printing for, then it will display only a date. If the customer was last visited by a different 'Route/Cost Center' it will display the 'Route/Cost Center' that performed the last visit
- d) Detailed Sales information about each transaction will be printed here if the SAR Configuration option 'Sales Detail' is toggled on.

7. Daily Totals

This section is where the daily totals are printed. These totals include sales, gross margin, and number of customers visited for the day.

8. 'Route/Cost Center' Totals

This section is where the 'Route/Cost Center' totals are printed. These totals include sales, gross margin, and number of customers visited by the 'Route/Cost Center'.

9. Grand Total

This section is where the grand totals are printed. These totals include sales, gross margin, and number of customers visited by all 'Routes/Cost Centers'.

1.1.2 Stop Analysis Report: Missed Customers

Page: 4 Date: Mar 12/02

PalmX Route Accounting
Stop Analysis Report by Cost Center
Cost Center (CC): 051 with Admin Entries.
for Dates: Dec 3/01
Missed Customers

Costno	Company	Mobile	Prior Visit
102018	CFM SHELL #306	051	Nov 21/01
102030	THAYER DECORATING CE	051	Last visited by 999 on Feb 7/01
102035	CAMPER EXCHANGE, INC	051	Last visited by 999 on Jan 16/01
102037	PARKSIDE NENI MART	051	Nov 19/01
102047	PIASA HARBOR #7857	051	Last visited by 999 on Oct 1/01
102066	SOUTH CENTRAL FS	051	Last visited by 999 on Jun 27/01
102081	NEW CUSTOMER #051	051	Nov 29/01
102140	FS FAST STOP - LITCH	051	Last visited by 999 on Dec 3/01
102147	Q-STOP	051	Last visited by 999 on Nov 19/01
102176	CITGO QUICK STOP	051	Nov 16/01
102281	STOP-N-GO MART INC.	051	Nov 26/01
102336	LEANN AMOCO (SWAN	051	Last visited by 999 on Nov 27/01
102398	TOBACCO CENTRAL	051	Nov 26/01
102481	WOODLAWN SHELL	051	Last visited by 999 on Oct 24/01
102582	POPPY'S	051	Last visited by 999 on Nov 21/01

The Missed Customers section of the Stop Analysis Report provides management with information about those customers that were not visited, and belong to the selected range of 'Route/Cost Center'. This report helps to identify customers who have not been visited, when they were last visited and by which employee. The following numbered list corresponds with the respective label in the above figure for further detailed explanation:

1. Report By

- Access to the Stop Analysis Report is provided through the Accounting/Report/Stop Analysis menu path. From here the user can choose to print the report based on a Route or Cost Center. For this example Cost Center has been selected.
- The user selects whether they wish to report on one Route or Cost Center, a range of Routes or Cost Centers, or All. The selected range of either 'Route' or 'Cost Center' will appear on this title line. For this example Cost Center '051' has been selected.
- The user can choose to include transactions created in Si Business Central. These transactions are included if the SAR configuration option 'Admin Entries' is set to 'Y'. For this example, administrative entries are included.

2. Report Dates

The report date range will print on this line. If the date range only includes one day, then only that date will print. If a range is selected, the start and end dates will print.

3. Report Sub-Title

The sub-title line displays the section of the SAR you are looking at. Depending on the SAR configuration by the user, the report can print 'Visited Customers', 'Missed Customers' or 'Summary'.

4. Missed Customer Information

This is the section where the missed customer information is printed. Included is the route that the customer is a member of, and the 'Prior Visit', or last visited date. If the customer was last visited by the same 'Route/Cost Center' as the report is currently printing for, then it will display only a date. If the customer was last visited by a different 'Route/Cost Center' it will display the 'Route/Cost Center' that performed the last visit.

1.1.3 Stop Analysis Report: Summary

The screenshot shows a report titled 'PalmX Route Accounting Stop Analysis Report by Cost Center'. It includes fields for Page (5), Date (Mar 12/02), Cost Center (051), and Dates (Dec 3/01). A table with columns Mobile, Date, Visited, Sales, and GMR is shown. Callout 1 points to the page number, callout 2 to the date, callout 3 to the report title, and callout 4 to the table data.

Mobile	Date	Visited	Sales	GMR
051	Dec 3/01	2	260.15	31.87
Totals:		2	260.15	31.87

The Summary section of the Stop Analysis Report provides management with a quick and simple summarization by 'Route/Cost Center' and Date. It provides a summary of daily 'Route/Cost Center' totals. The following numbered list corresponds with the respective label in the above figure for further detailed explanation:

1. **Report By**
 - a) Access to the Stop Analysis Report is provided through the Accounting/Report/Stop Analysis menu path. From here the user can choose to print the report based on a Route or Cost Center. For this example Cost Center has been selected.
 - f) The user selects whether they wish to report on one Route or Cost Center, a range of Routes or Cost Centers, or All. The selected range of either 'Route' or 'Cost Center' will appear on this title line. For this example Cost Center '051' has been selected.
 - g) The user can choose to include transactions created in Si Business Central. These transactions are included if the SAR configuration option 'Admin Entries' is set to 'Y'. For this example, administrative entries are included.
2. **Report Dates**

The report date range will print on this line. If the date range only includes one day, then only that date will print. If a range is selected, the start and end dates will print.
3. **Report Sub-Title**

The sub-title line displays the section of the SAR you are looking at. Depending on the SAR configuration by the user, the report can print 'Visited Customers', 'Missed Customers' or 'Summary'.
4. **Summary Information**

This is the area where the summarized report information is printed. The summary, which totals by 'Route/Cost Center' and subtotals by date, provides sales, number of customer's visited and gross margin information.