

DAC OFFICE

SALES REP.
CUSTOMER
CATEGORIES

STEP 1: SELECT CUSTOMERS BY DOUBLE-CLICKING THE SALES REP OR EACH INDIVIDUAL CUSTOMER.

STEP 2: SELECT THE CATEGORIES AND/OR RESTRICT THE WAREHOUSE.

STEP 3: ENTER DATE RANGE FOR EACH PERIOD. CLICK THE "<" BUTTON TO PULL FROM THE GLOBAL FILTER.

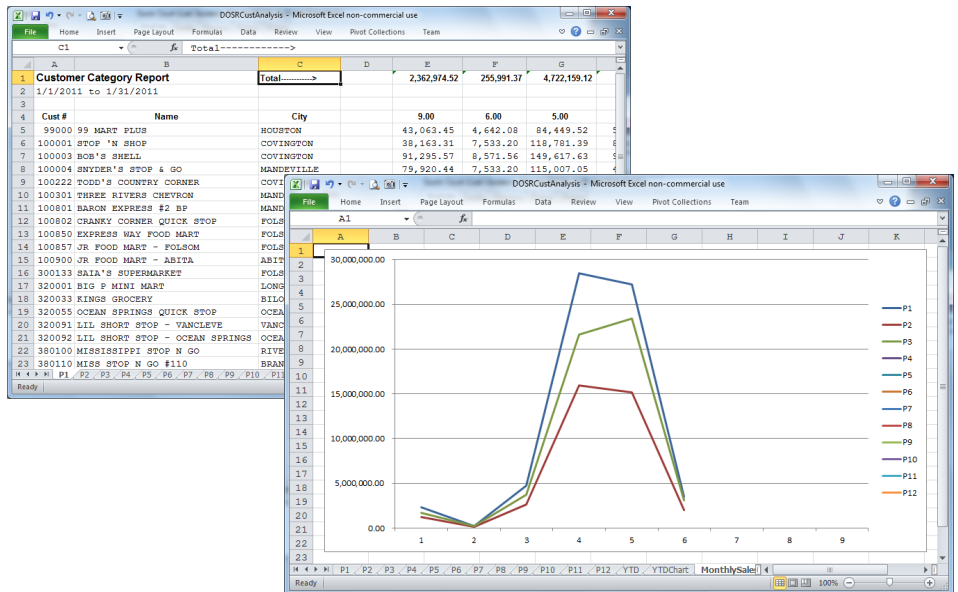
STEP 4: CLICK THE IMPORT BUTTON TO VIEW THE DATA IN THE GRID AND THE SAVE BUTTON TO STORE LOCALLY.

CustNo	Name	City	CatNo	Sales	Cost	Profit	Percent
99000	99 MART PLUS	HOUSTON	1	645175.44	602907.96	42267.48	6.55
99000	99 MART PLUS	HOUSTON	2	61853.3	52173.3	9680.0	15.65
99000	99 MART PLUS	HOUSTON	4	587546.6	441085.84	146460.76	24.93
99000	99 MART PLUS	HOUSTON	5	84449.52	73870.0	10619.75	12.58
99000	99 MART PLUS	HOUSTON	6	4642.08	3927.0	1258.56	27.11
99000	99 MART PLUS	HOUSTON	7	4642.08	3927.0	11681.75	27.13
100003	BOB'S SHELL	COVINGTON	4	941419.4	709083.71	232335.69	24.68

GIVES YOUR SALES FORCE INFORMATION ON WHAT THEIR CUSTOMERS BUY!

GRAPHICALLY COMPARE CATEGORY SALES FOR EACH PERIOD AND IDENTIFY SLOW MOVING CATEGORIES.

Click the Export button to create the 14 tab spreadsheet. Each period is exported separately, saving time. During the current period, check the "Export Grid" box every time you want to export that data to Excel. If the box isn't checked, the data for that period will not be exported but the perviously loaded data will still be there. The YTD Category Sales and Monthly Sales will be created once and reflect all periods.



REDESIGNED IN
VERSION 1.22

2011

Please email all questions and/or suggestions to DACOffice@CDRSoftware.com. To install the latest version of DAC Office, goto <http://DACOffice.CDRSupport.net>. Note: DAC Office only works with distributors using DAC. For more information on DAC, please visit our website at

<http://www.CDRSoftware.com>

E-mail: Support@CDRSoftware.com

Phone: (985) 626-8408 x321