

SageCRM Enhancement: The MyCRM > Item Sales Analysis Report

We add a custom tab to your MyCRM section called Item Sales Analysis. Enter in all or part of the Item Code you would like to analyze and choose from Detailed Item Sales or Group Sales by Customer options.

The **Detailed Item Sales** button option will display a list of every line-item sale for the specified date range with the Customer information included. This is great for managers that want to review specific item sales and take a look at Customers that are purchasing specific products. See the example screen shot below.

Item Sales Analysis (Invoiced)

Enter the ItemCode: **LED-LBRST140-BWF** Enter Start Date (MM-DD-YYYY): 9-3-2022 Enter End Date (MM-DD-YYYY): 12-2-2022 **Detailed Item Sales** Group Sales by Customer

Drag a column header and drop it here to group by that column

Company Name	Customer #	ShipTo Name	Invoice Date	Invoice #	Item Code	Item Code Desc	Qty Shipped	Unit Price	Extension Amt
ACE Hardware Corp	0000001	ACE Hardware Corporation	11-22-2022	33916	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	1	\$0.00	\$0.00
The Value Company	0000059	Home Services WISCONSIN	11-18-2022	33618	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	12	\$22.71	\$272.52
The Value Company	0000059	Home Services WISCONSIN	11-09-2022	33004	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	12	\$19.13	\$229.56
Landscape Products	W15	Landscape Products	11-08-2022	32842	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	6	\$21.48	\$128.90
Tough One Lawn & Lighting	0001788	Tough One Landscaping	11-08-2022	32875	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	24	\$21.48	\$515.60

The **Group Sales by Customer** button will group the Item sales by customer for the specified date range. This is the option you would use if you wanted to generate a list of all customers that purchased a specific item so that you could send them an email or a mailer. Generate your list and then use the Export to Excel button. See the screenshot example below.

Item Sales Analysis (Invoiced)

Enter the ItemCode: **LED-LBRST140-BWF** Enter Start Date (MM-DD-YYYY): 9-3-2022 Enter End Date (MM-DD-YYYY): 12-2-2022 **Detailed Item Sales** **Group Sales by Customer**

Drag a column header and drop it here to group by that column

Company Name	Customer #	Person	EmailAddress	Item Code	Item Code Desc	Item Sales
Tough One Lawn & Lighting	0001788	Brian Welper	bwelper@toughoneguyslawncare.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$515.60
Landscape Products	W192	Jimmy Tompkins	jtompkins@landscapeproducts.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$344.34
The Treasure Chest	0002263	Kelli Malin	kmalin@treasurechest.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$286.92
Thomas Holiday Decor, WI Inc	0002026	Patrick Anthony	patrick@thomasdecor.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$286.92
Landscape Products	0000307	Chris Dunson	cdunson@landscapeproducts.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$257.76
LED - Goods	0001621	Robert Bingham	rbingham@ledgoods.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$257.76
Lexus Family Hardware	0002540	Marti Cordell	mcordell@lexusfamilyhardware.com	LED-LBRST140-BWF	LED 36" Light Burst - Frozen	\$143.46

Reach out to Effective Solutions for pricing