

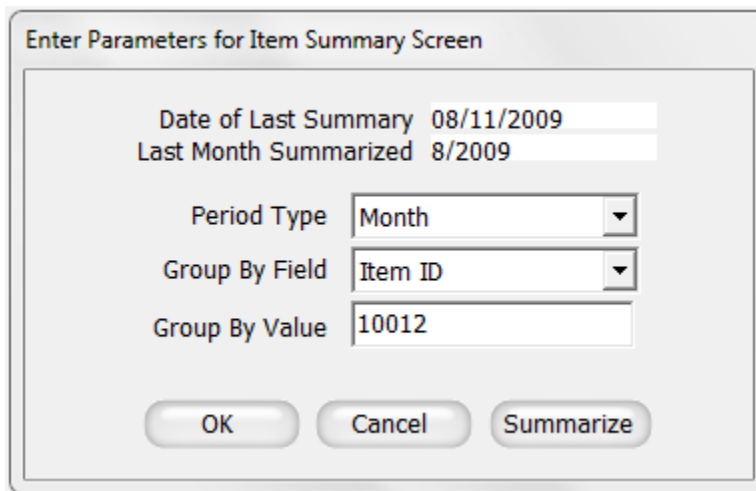
Operation Educate

Summarize Items

The item summary feature helps you view item performance patterns by letting you quickly view item transactions. I will show you how to set this up on both Windows and Mac below.

WINDOWS:

1. Open Inventory. Go to an Item that you would like to see a summary for.
2. Click the "Summary" button in the bottom right corner.
3. You will be presented with the following window



Enter Parameters for Item Summary Screen

Date of Last Summary 08/11/2009
Last Month Summarized 8/2009

Period Type Month
Group By Field Item ID
Group By Value 10012

OK Cancel Summarize

Period Type: Choose to summarize the information by month, quarter, or year. This determines if a line item on the item summary will summarize information for a single month, a quarter, or an entire year.

Group By Field: Select the criteria you want used in grouping items into an item line. For example, select Item ID to view summary information for an individual item. Select Misc 3 to view summary information for a particular group of items. The range of item grouping can vary from individual items to entire departments of items.

Group By Value: Enter the specific definition for the Group By Field previously selected. For example, if you selected Item ID you would enter a single item ID such as 1015. If you selected Misc 3, you would enter a Subcategory such as Accounting.

4. Click OK and you will be presented with the following window

Enter Range of Months to Summarize

Select Dates

Month Year

From 01 2007

To 01 2009

OK Cancel

Enter a range of months to summarize in the From/To Month/Year fields.

5. Click OK and you will be given your summary report. Example below

Item Summary

Period: Month, Group By: Item ID, ID: 10012, Description: Oaklev Snow AF\VR28

Last Update: 02/20/2009, Last Sale: 02/14/2008, Last Ordered: 02/14/2008, Last Received: 02/14/2008

#	Period	Ordered	Received	Sale Qty	Sale Amt	Cost Amt	Margin Amt	Margin %
1	2/2008	95	95	95	10830.00	6205.40	4624.60	42.7
2	1/2008	15	15	6	720.00	391.92	328.08	45.6

MAC:

1. Open Item Summary Definition. INVENTORY>MISC>SUMMARIZE ITEMS
2. You will be presented with the following window

The screenshot shows a window titled "Summarize Items" with the following fields and buttons:

- Process Month:** Year: 2009, i.e. '2001', Month: January, Summarize button.
- Process Year:** Year: 2009, i.e. '2001', Summarize button.
- Summary Years:** Year One: 2008, Year Two: 2009, Update button, Roll Years button.
- Finished** button at the bottom.

Process Month: You can process an individual month by entering the year and month then pressing the Summarize button. Repeat for each month to be included.

Process Year: You can process an entire year by entering year then pressing Summarize button. This will take a good amount of time if you have a large database.

Summary Years: Define the Summary Years by entering the current and previous year. Two tables will be shown. The year entered in the first field will show in the left table and the year entered in number two will be shown in the right table. Two previous years can also be summarized. Once the years have been entered you must click the Update button.

Update: Click the Update button to update the year headings shown on the Item Summary when the Summary Years are changed. It will not move the information with the heading.

Roll Years: Click the Roll Years button to move the summarized information from year two to year one. There will no longer be any information for year two. After rolling the information, you need to type in the correct date for Year One and Year Two then click the Update button.

3. Once the summary is finished. Go to an Item that you would like to see a summary for.
4. Click the "Summary" button in the bottom right corner and you will be given your summary report. Example below

Item Summary

Item ID

10012

2008

2009

	2008						2009						
	Ord	Rcvd	Sold	Sales	COGS	Margin %	Ord	Rcvd	Sold	Sales	COGS	Margin %	
Jan	15	15	8	960	522.56	45.6	Jan	0	0	3	360	195.96	45.6
Feb	0	0	0	0	0	-	Feb	0	0	5	600	326.6	45.6
Mar	0	0	1	120	65.32	45.6	Mar	15	15	7	840	457.24	45.6
Apr	15	15	6	720	391.92	45.6	Apr	0	0	7	840	457.24	45.6
May	0	0	4	480	261.28	45.6	May	0	0	8	960	522.56	45.6
Jun	0	0	2	240	130.64	45.6	Jun	18	18	3	360	195.96	45.6
Jul	13	13	7	840	457.24	45.6	Jul	0	0	7	840	457.24	45.6
Aug	0	0	8	960	522.56	45.6	Aug	13	13	6	720	391.92	45.6
Sep	0	0	5	600	326.6	45.6	Sep	0	0	0	0	0	-
Oct	0	0	1	120	65.32	45.6	Oct	0	0	0	0	0	-
Nov	0	0	5	600	326.6	45.6	Nov	0	0	0	0	0	-
Dec	26	26	7	840	457.24	45.6	Dec	0	0	0	0	0	-
	69	69	54	6480.00	3527.28	45.6		46	46	46	5520.00	3004.72	45.6

OK