Simple scenario Sales Analysis Creation ERP MS Dynamics NAV 2018w1

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Date : 14.11.2019

For : MPH AOMA and AOPR and BPH EPS1

Database : MS Dynamics NAV 2018w1

Keys : Ctrl-N=New, F4=Look-up, Ctrl-F7-entries, F7-statistics, F9-post

Shorthands : G/L General Ledger, TO-Transfer Order

Tutor-TU

1. Go to working date 1.1.2020

2. We have to create some item ledger entries in year 2020. Our choice will be selling some chairs on 1.1.2020 and 1.2.2020. So for that purpose we will create two sales orders on these two dates. For the sake of simplicity, we present only selling lines of the first sales order. In red frame you see number of invoices because author recently posted another SO, and this is the copy of it You will use the copy for the second SO. By use of sequence Action-> Copy document. After posting the first SO change the working date to 1.2.2020

Lines											
III Line ▼ 🛅 Order ▼ 👫 Find Filter 🎖 Clear Filter											
Туре	No.	Description	Location Code	Quantity Qty. to Assemble to Order	Reserved Unit of Quantity Measur	Unit Price Excl. VAT	Line Amount Excl. VAT				
		Invoice No. 103039:									
ltem	1900-S	PARIS Guest Chair, black	BLUE	1	PCS	125,10	125,10				
ltem	1908-S	LONDON Swivel Chair, blue	BLUE	2	PCS	123,30	246,60				
ltem	1936-S	BERLIN Guest Chair, yellow	BLUE	3	PCS	125,10	375,30				
ltem	1980-S	MOSCOW Swivel Chair, red	BLUE	4	PCS	123,30	493,20				
ltem	1960-S	ROME Guest Chair, green	✓ BLUE	3	PCS	125,10	375,30				

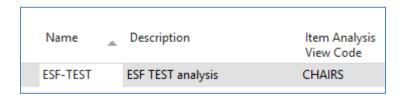
3. You should see just created item ledger entries. Below entries are the one from the first posted sales order.

Posting Date	Entry Type	Document Type	Document No.	Item No.	Des	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)
01.01.2020	Sale	Sales Shipment	102052	1960-S		BLUE	-3	-3	0	375,30	-292,50
01.01.2020	Sale	Sales Shipment	102052	1980-S		BLUE	-4	-4	0	493,20	-384,40
01.01.2020	Sale	Sales Shipment	102052	1936-S		BLUE	-3	-3	0	375,30	-292,50
01.01.2020	Sale	Sales Shipment	102052	1908-S		BLUE	-2	-2	0	246,60	-192,20
01.01.2020	Sale	Sales Shipment	102052	1900-S		BLUE	-1	-1	0	125,10	-97,50
01.01.2020	Sale	Sales Shipment	102050	1960-S		BLUE	-3	-3	0	375,30	-292,50
01.01.2020	Sale	Sales Shipment	102050	1980-S		BLUE	-4	-4	0	493,20	-384,40
01.01.2020	Sale	Sales Shipment	102050	1936-S		BLUE	-3	-3	0	375,30	-292,50
01.01.2020	Sale	Sales Shipment	102050	1908-S		BLUE	-2	-2	0	246,60	-192,20
01.01.2020	Sale	Sales Shipment	102050	1900-S		BLUE	-1	-1	0	125,10	-97,50

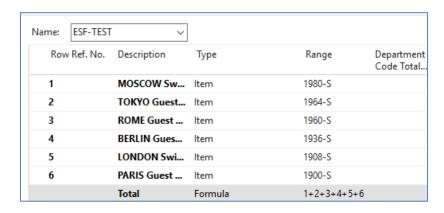
4. Go back in time to 1.1.2020 (the working date) and then use Sales &Marketing ->Administration and you will get:

Analysis & Reporting Setup Analysis Types Sales Analysis Line Templates

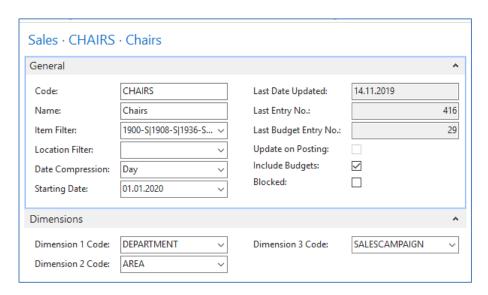
Sales Analysis Line Templates Sales Analysis Column Templates Sales Analysis Views 5. Let's create a new Sales Analysis Line Template by icon new



By icon Lines, you will enter data by use of icon Insert items



6. Item analysis View Code looks like this (the principle I similar to the one already presented in the examples related to Accounting schedules. In item filter, we have manually entered all chairs separately by character "|" (right alt gr +W). New created Vies must be updated.



7. Sales & Marketing -> Reports and analysis



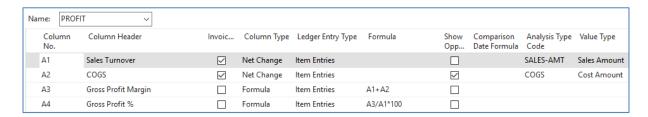
8. By use of New icon you create a new line representing our brand new report Chairs



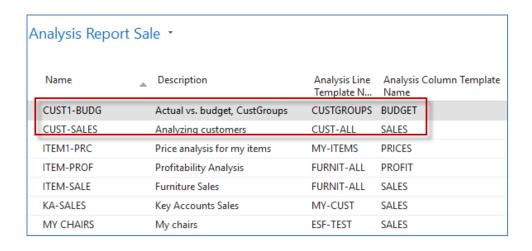
9. To open it you must Edit Analysis report and then use icon Show-matrix, and you will get

Row Ref. No.	Description	Sales Turnover	COGS	Gross Profit Margin	Gross Profit %	
1	MOSCOW Swivel Chair, red					
2	TOKYO Guest Chair, blue					
3	ROME Guest Chair, green	750,60	585,00	165,60	22,06	
4	BERLIN Guest Chair, yellow	750,60	585,00	165,60	22,06	
5	LONDON Swivel Chair, blue	493,20	384,40	108,80	22,06	
6	PARIS Guest Chair, black	250,20	195,00	55,20	22,06	
	Total	2 244,60	1 749,40	495,20	22,06	

10. You could modify the report by changing the Column template. To show the logic of the column template, we present below the template Profit

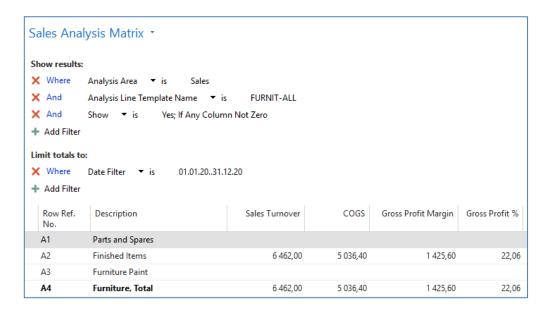


10. Go to the Sales budget, and you can see some figures already entered to budget matrix. Then from the set of already created reports, try to see some data. Firstly icon Edit report and then Show-matrix

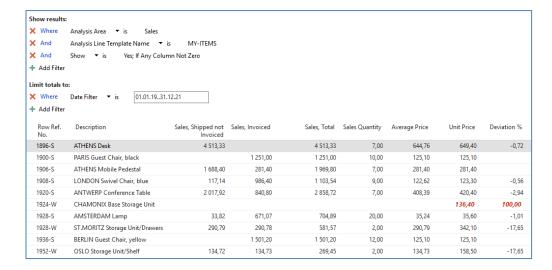




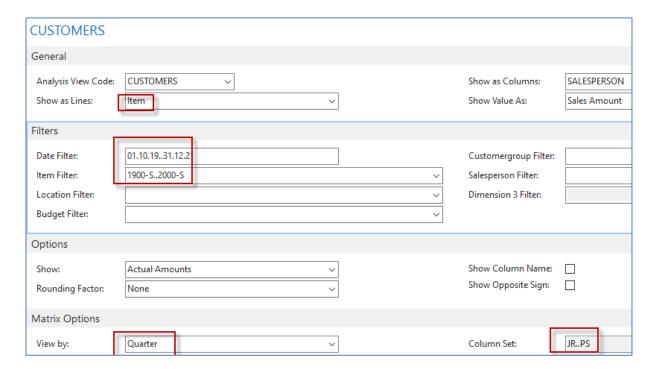
or



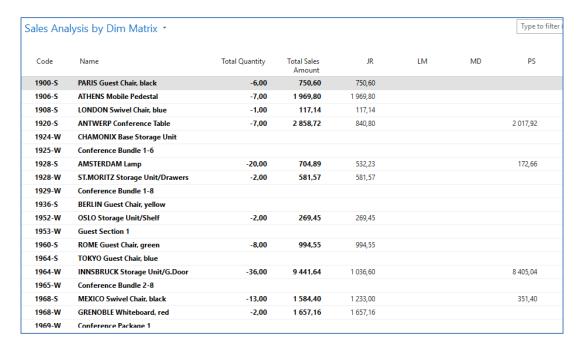
and lastly



Another set of reports is called **Analysis by dimensions** and as one result will show one possible setup out of many and the results



The report starts by use of icon Show-matrix



Other possibilities might be

