

TCI Category Analyzer:

**Complete Sales and
Profitability Reporting**



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Category Analyzer is a powerful tool designed to assist chains or single retailers with the analysis of their sales and profitability. This module tracks historical item movement, cost, and retail prices by store in order to provide valuable reporting at many levels. This information will help buyers, category managers, and store personnel reduce inventory, increase sales and raise gross profit mix, and create better merchandising strategies.

Product Hierarchy

The system provides historical data via pre-established rollups based on the following relationships for faster reporting:

Major Department (i.e. Grocery)

Minor Department (i.e. Dairy)

Major Category (i.e. Milk)

Minor Category (i.e. 1/2 Gallon Milk)

Item (i.e. Borden 1/2 Gallon Homo Milk)

Additional ad-hoc rollups based on many other fields are available such as vendor, vendor type, brand, buyer, price link and many more.

Flexibility

Category Analyzer tracks item movement by day, week, and year by default. Custom time periods can be created to accumulate data for frequently used reports such as rolling 13 weeks, period, month, ad week, etc. Reports can be created by selecting the pre-established relationships above or by using a wide variety of ad-hoc selection criteria for stores and items. All reports can be customized to display, sort, and sub-total by any field. In addition, data can be exported to Excel, CSV, HTML, XML, PDF, and Text Files.

These sample reports illustrate the power of Category Analyzer:

- Movement Reports
- Contribution Reports
- Multiple Date Range Reports
- Exception Reports
- Special Format Reports
- Drill-down Reports



Movement Reports

Item Ranking by Movement

The Item Ranking Report allows the user to select any group of items, for any group of stores, and display the results for the specified time frame sorted in order based on fields such as:

- Unit Movement
- Case Movement
- Average Unit Movement
- Average Case Movement
- Dollar Sales

In addition to a grand total at the end of the report, a sub-total will be displayed for each category and store that was selected. The user can select which fields are used for sub-totals such as: unit movement, dollar sales, gross profit dollars and gross profit percent.

In this example, '2003 Calendar' Year movement for the Bottled Water category was selected for store #128. The user has control over what columns are displayed and how they are arranged on the report.

The ability to limit or filter the data based on some criteria exists for all reports. In this case, only the Top 20 items based on unit movement are displayed. Notice that the totals for the Store, Category, and Report are based only on the Top 20 items for this store.

This report can be used to evaluate performance of items for categories, departments, vendors, brands, stores, etc.



Featured Report: Bottled Water Top 20 Ranked by Units Sold

Description	Item Information				Movement Data				
	UPC	Pack	Size	Report Rank	Units Sold	Avg Retail	Sales \$	GP\$	GP%
Store Number: 00128									
Minor Category: 050FH (BOTTLED WATER)									
BEST YET DRINKING WATER	000-42187-40441	3	1 GL	1	1,334	\$0.65	\$862.66	\$173.61	20.12 %
BY DISTILLED WATER	000-42187-40443	3	1 GL	2	855	\$0.59	\$504.45	\$71.75	14.22 %
AQUAFINA WATER 6PK .SLT	000-12000-00317	4	6 16.9OZ	3	548	\$1.63	\$893.54	(\$23.31)	-2.61 %
PAR DRINKING WATER	000-50700-29011	3	128OZ	4	251	\$0.59	\$148.24	(\$13.23)	-8.92 %
OASIS DRINKING WATER	000-72631-00012	6	1.00GAL	5	201	\$0.92	\$185.01	\$45.95	24.83 %
ABERFOYLE SPRING WATER CASE	000-68274-00022	1	12/16 OZ	6	191	\$2.86	\$546.10	\$154.55	28.30 %
OZRKA DRINKING WATER	000-22592-00009	6	1.00GAL	7	181	\$1.03	\$186.39	\$46.58	24.99 %
OZARKA SPRING WATER	000-22592-00005	6	1.00GAL	9	149	\$1.15	\$171.99	\$49.90	29.02 %
OASIS DISTILLED WATER	000-72631-00011	6	1.00GAL	10	129	\$0.95	\$122.11	\$33.36	27.32 %
BY SPRING WATER	000-42187-40449	3	1 GL	11	107	\$0.88	\$94.16	\$35.02	37.19 %
DRINK/DISTILLED WATER 5 GALLON	000-00000-00311	1	5 GAL	12	101	\$5.99	\$604.99	\$140.39	23.21 %
NATURALLY FRESH SPRING WATER	000-76539-09100	12	16.9 OZ	13	100	\$0.50	\$50.00	\$12.50	25.00 %
PAR DISTILLED WATER	000-50700-29010	3	128OZ	14	87	\$0.58	\$50.66	(\$5.31)	-10.48 %
AQUAFINA WATER 6PK 24OZ	000-12000-00875	4	6 24 OZ	15	85	\$2.18	\$185.23	\$33.89	18.30 %
OASIS DRINKING WATER	000-72631-00015	2	2.50GAL	16	77	\$2.47	\$190.33	\$49.70	26.11 %
OZARKA WATER SPORT BOTTLE	000-22592-00060	4	144 OZ	17	75	\$2.78	\$208.23	\$53.66	25.77 %
OZARKA SPRING WATER	000-22592-00811	4	12/8 OZ	18	73	\$2.92	\$213.17	\$63.68	29.87 %
OZARKA DISTILLED WATER	000-22592-00008	2	2.50GAL	19	53	\$2.83	\$150.23	\$40.98	27.28 %
PERRIER WATER	000-74780-00005	12	25.00OZ	20	49	\$1.40	\$68.51	\$23.63	34.49 %
Totals for Minor Category: 050FH					4,646		\$5,436.00	\$987.31	18.16 %
Report Totals					4,646		\$5,436.00	\$987.31	18.16 %



Movement Reports

Item Ranking by Gross Profit Percent

Like the Item Movement Report (shown previously), the user can select any group of items, for any group of stores, and display the results for the specified time frame in the Item Ranking Reports.

In this example, '2003 Calendar Year' movement for the Dairy Department was selected for the entire chain.

Notice that this report is ranked based on the gross profit percentage generated by the item during the time period for the *entire chain*. Since the system tracks historical cost, retail, and unit movement by store, this gross profit percentage accurately reflects the impact of different price points and costs during the year.

This sample is limited to the Top 25 Dairy items in the chain based on gross profit percent.

This type of report can be used to evaluate chain wide performance on any group of items.

Note: The user has the ability to use a top and/or bottom criteria for a specified limit amount (for example: top 100, top 50, bottom 25, etc.)



Featured Report: Total Chain Dairy Dept – Top 25 Ranked by Gross Profit Percent

Description	Item Information				Movement Data				
	UPC	Pack	Size	Report Rank	Units Sold	Avg Retail	Sales \$	GP\$	GP%
Store Number: CMPNY (Company Totals)									
Minor Department: 101 (DAIRY)									
PAR RUBY RD GF CTAIL	000-50700-06882	8	48 OZ	1	8	\$2.22	\$17.75	\$9.34	52.62 %
SNY D CD SMTH CALIF STYLE	000-50200-01538	12	16 OZ	2	221	\$0.98	\$217.19	\$110.00	50.65 %
SNY D CD TANGY FLA STYLE	000-50200-01537	12	16 OZ	3	291	\$0.99	\$286.89	\$144.90	50.51 %
BY GRATED PARMESAN CHEESE	000-42187-02110	12	8 OZ	4	263	\$3.49	\$917.87	\$431.11	46.97 %
DEANS NON FAT FRNCH ONION	000-41900-04999	12	12 OZ	5	100	\$1.96	\$195.67	\$90.65	46.33 %
KFT GRATED PARMESAN	000-21000-61530	12	1.500Z	6	257	\$1.34	\$343.71	\$159.11	46.29 %
BY TX STYL BTR BSCT	000-42187-0859	12	12 OZ	7	199	\$1.08	\$214.52	\$97.76	45.57 %
DEANS FRENCH ONION DIP	000-41900-02094	12	8 OZ	8	445	\$1.48	\$658.55	\$299.01	45.40 %
DEANS RANCH DIP	000-41900-04285	12	8 OZ	9	279	\$1.47	\$411.51	\$185.31	45.03 %
KFT HORSERADISH TALL	000-21000-65352	12	5.000Z	10	51	\$1.67	\$85.29	\$38.21	44.80 %
PARADE ORANGE JUICE	000-50700-04965	8	64 OZ	11	19	\$2.29	\$43.46	\$19.31	44.43 %
PAR OJ WITH CALCIUM	000-50700-04966	8	64 OZ	12	17	\$2.17	\$36.95	\$16.32	44.16 %
B Y TX STYL HOMESTYL BIS	000-42187-02026	12	12 OZ	13	390	\$1.02	\$399.50	\$174.46	43.67 %
B Y TX STYL BUTRMLK BISCT	000-42187-02024	12	12 OZ	14	504	\$1.01	\$510.52	\$221.67	43.42 %
BY CRSCNT RLS	000-42187-02034	12	8 OZ	15	489	\$1.85	\$904.05	\$390.56	43.20 %
PAR TEXSTY BUMLK BIS	000-50700-28502	12	12 OZ	16	142	\$1.16	\$164.98	\$71.10	43.10 %
B Y CINNAMON ROLLS	000-42187-02156	12	12.4 OZ	17	441	\$1.88	\$828.14	\$355.84	42.97 %
DEANS FRENCH ONION DIP	000-41900-02093	12	16 OZ	18	875	\$1.98	\$1,728.34	\$741.93	42.93 %
BY RANCH DIP	000-42187-01066	12	16 OZ	19	569	\$1.29	\$734.11	\$312.98	42.63 %
BY FR ONION DIP	000-42187-01065	12	16 OZ	20	586	\$1.29	\$754.60	\$321.01	42.54 %
PAR 8CT CINNAMON ROL	000-50700-28535	12	12.4Z	21	99	\$1.94	\$191.75	\$81.36	42.43 %
PAR TEX STY BTR BIS	000-50700-29422	12	12 OZ	22	179	\$1.09	\$195.41	\$81.33	41.62 %
PAR 8CT CRESC ROLLS	000-50700-28564	12	8 OZ	23	116	\$1.85	\$214.92	\$88.86	41.35 %
PAR SOUR CREAM	000-50700-30696	12	16 OZ	24	163	\$1.73	\$281.46	\$115.88	41.17 %
FLSHMN MAR SOFT SLV #1	000-29000-00844	18	16 OZ	25	223	\$1.45	\$324.28	\$133.17	41.07 %
Totals for Minor Department: 101					6,926		\$10,561.42	\$4,691.18	44.00 %
Report Totals					6,926		\$10,561.42	\$4,691.18	44.00 %



Contribution Reports

Sales Contribution Percent

Sales Contribution Reports measure which items are providing the most *sales* impact for the date range(s) that are displayed. Category Analyzer tracks historical data that includes the retail for each item by store. The contribution percentage is defined as the ratio of the item sales divided by the sales of the next sub-total. This measurement can be examined for any date range, for any group of stores, and any group of items.

The user has control over how the report is sub-totaled, allowing an incredible number of variations of this report be created.

For example:

- Sales contribution of each item to a vendor's total sales
- Sales contribution of each item to the sales of a department or category
- Sales contribution of each item to a store's total sales

In this example, items are sub-totaled by price link (a code that associates items with the same cost and retail) for store #109 from January - July 2003.

The sales contribution of each item is calculated for its corresponding link.

For example, *Coca Cola Classic 3 Liter* is 43.59% of the sales of all items that use the "Coke 3 Liter" price link ($\$323.93 \div \743.15).

In addition, all of the items that use the "Coke 3 Liter" link are 68.48% of the total sales on this report ($\$743.15 \div \1085.16).

Other columns featured on this report are:

- Average retail - calculated by dividing the total sales for the period by the total units sold
- Order number - used for items that are supplied through a warehouse



Featured Report: Sales Contribution by Price Link

Description	Item Information			Movement Data		
	Pack	Size	Order Number	Avg Retail	Sales \$	Sales Contribution%
Store Number: 00109 (#109)						
Price Link: 100 (Coke 3 Liter)						
COCA COLA CLASSIC 3 LITER	6	101.4 OZ	D S D	\$1.49	\$323.93	43.59 %
DIET COKE 3 LITER	6	101.4 OZ	D S D	\$1.49	\$203.09	27.33 %
SPRITE 3 LITER	6	101.4 OZ	D S D	\$1.44	\$125.27	16.86 %
DIET COKE CAFFIENE FREE 3 LTR	6	101.4 OZ	D S D	\$1.48	\$59.04	7.94 %
VANILLA COKE 3 LITER	6	101.4 OZ	D S D	\$1.41	\$26.76	3.60 %
MINUTE MAID ORANGE 3LITER	6	101.4 OZ	D S D	\$1.69	\$5.07	0.68 %
RED FLASH SODA 3 LITER BOTTLE	6	101.4 OZ	D S D	\$0.00	\$0.00	0.00 %
SPRITE TROPICAL REMIX	6	101.4 OZ	D S D	\$0.00	\$0.00	0.00 %
Totals for Price Link: 100					\$743.15	68.48 %
Price Link: 200 (Alpo Dog Food 13oz)						
ALPO HEARTY LOAF W/BEEF	24	13.2 OZ	395483	\$0.59	\$45.42	21.08 %
ALPO HEARY LOAF W/CHCKN	24	13.20OZ	395517	\$0.58	\$43.77	20.32 %
ALPO DICED CUTS W/BEEF	24	13.20OZ	395467	\$0.62	\$19.85	9.21 %
ALPO PRIME CUT-GOURMET	24	13.20OZ	395624	\$0.61	\$19.02	8.83 %
ALPO PRIME CUT-TRKY&BCN	24	13.20OZ	395657	\$0.57	\$17.16	7.96 %
ALPO PRM W/BF/RTNI/VEG	24	13.2 OZ	395806	\$0.51	\$14.26	6.62 %
ALPO PRIME CUT-BF & LVR	24	13.20OZ	395707	\$0.57	\$14.13	6.56 %
ALPO PRIME SLICES W/BEEF	24	13.2 OZ	395814	\$0.62	\$13.60	6.31 %
ALPO PRME CUTS-BF	24	13.20OZ	395699	\$0.60	\$13.09	6.08 %
ALPO PRIME CUT W/BF&RICE	24	13.20OZ	171728	\$0.58	\$11.00	5.11 %
ALPO PRIME CUT W/LMB&RICE	24	13.20OZ	395764	\$0.59	\$4.15	1.93 %
ALPO PRIME CUTS-CHICKN	24	13.20OZ	395673	\$0.00	\$0.00	0.00 %
ALPO PRIME CUT-BF STEW	24	13.20OZ	395640	\$0.00	\$0.00	0.00 %
ALPO PRIME SLICES W/CHKN	24	13.2 OZ	395822	\$0.00	\$0.00	0.00 %
ALPO DICED CUTS W/CHICKEN	24	13.20OZ	171710	\$0.00	\$0.00	0.00 %
Totals for Price Link: 200					\$215.45	19.85 %
Price Link: 300 (Kraft BBQ Sauce 18oz)						
KFT ORIG BBQ SAUCE	12	18.00OZ	202952	\$1.14	\$34.30	27.10 %
KFT HONEY BBQ SAUCE	12	18.00OZ	202143	\$0.97	\$16.49	13.03 %
KFT MESQUITE BBQ SAUCE	12	18.00OZ	203000	\$1.13	\$14.69	11.61 %
KFT HNY HICKORY BBQ SCE	12	18.0 OZ	202192	\$1.21	\$13.27	10.49 %
KFT BBQ HNY RST GRLC	12	18 OZ	202267	\$1.06	\$11.71	9.25 %
KFT HONEY MSTRD BBQ SCE	12	18.0 OZ	202168	\$1.04	\$7.31	5.78 %
KFT THKNSPCY BRN SGR BBQ	12	18 OZ	202218	\$1.14	\$6.86	5.42 %
KRFT HICKY SMK BBQ SAUCE	12	18.00OZ	203034	\$1.14	\$6.86	5.42 %
KFT ONION B-B-Q SAUCE	12	18.00OZ	203133	\$1.06	\$6.34	5.01 %
KFT BBQ SCE-HCK SMK/ON	12	18.00OZ	203083	\$0.97	\$4.85	3.83 %
KFT THK&SPICY BBQ-ORIG	12	18.00OZ	202101	\$0.97	\$3.88	3.07 %
Totals for Price Link: 300					\$126.56	11.66 %
Report Totals					\$1,085.16	



Contribution Reports

Gross Profit Contribution Percent

Gross Profit Contribution Reports measure which items are providing the most *gross profit dollars* for the date range(s) that are displayed.

The contribution percentage is defined as the ratio of the gross profit dollars by item divided by the gross profit dollars of the next sub-total. Category Analyzer tracks historical data that includes the cost and retail for each item by store. Therefore, the gross profit by item by store for any date range can be evaluated using this format.

In this example, the Spaghetti Sauce Category was requested for store #123 for the Second Quarter (user-defined date range).

The gross profit dollars of each item is divided by the category total gross profit dollars to represent each item's share of the total (\$99.68).

For example, *Ragu Spaghetti Sauce w/Meat* contributed 16.25% of the gross profit dollars for this category during the Second Quarter.

Other columns featured on this report are:

- Current unit cost for each item for store #123 (cost is provided by an interface to a back office system)
- Rank of each item on the report based on its contribution percent



Featured Report: Spaghetti Sauces 2nd Qtr - Gross Profit Contribution

Description	Item Information					Movement Data	
	UPC	Pack	Size	Current Cost	Report Rank	GP\$	GP Contribution%
Store Number: 00123 (#123)							
Minor Category: 006AR (SAUCE, SPAGHETTI)							
RAGU SPAG SAUCE W/MEAT	000-36200-00300	12	26.0 OZ	\$1.65	1	\$16.20	16.25 %
BRTOLI 5BROS CRMY ALFRDO	000-36200-00474	12	16.0 OZ	\$2.14	2	\$13.26	13.30 %
RAGU SPAG SAUCE-PLAIN	000-36200-00250	12	26.0 OZ	\$1.65	3	\$6.30	6.32 %
RAGU HRTY ONION&GARLIC	000-36200-00468	12	26.0 OZ	\$1.65	4	\$5.76	5.78 %
PREGO MEAT SPAG SAUCE	000-51000-02794	12	26 OZ	\$1.65	5	\$5.68	5.70 %
PREGO REG SPAGHETTI SCE	000-51000-02549	12	30.00OZ	\$1.65	6	\$4.97	4.99 %
RAGU SPAG SAUCE W/MUSHRM	000-36200-00350	12	26.0 OZ	\$1.65	7	\$4.92	4.94 %
RAGU GS TOM&GRLC/ONION	000-36200-00440	12	26.0 OZ	\$1.65	8	\$4.50	4.51 %
RAGU HRTY ONION&MUSHRM	000-36200-00482	12	26.0 OZ	\$1.65	9	\$4.50	4.51 %
RAGU MUSHROOM&GRN PEPR	000-36200-00441	12	26.0 OZ	\$1.65	10	\$4.38	4.39 %
RAGU CLSC ITLN STYLE SCE	000-36200-01398	12	32 OZ	\$2.18	11	\$4.10	4.11 %
RAGU SPR VEG PRIMAVERA	000-36200-00446	12	26.0 OZ	\$1.65	12	\$3.48	3.49 %
RAGU HRTY 7 HERB TOMATO	000-36200-00480	12	26.0 OZ	\$1.65	13	\$3.12	3.13 %
PREGO 3 CHEESE SAUCE	000-51000-05043	12	26 OZ	\$1.57	14	\$2.84	2.85 %
RAGU RCH&MTY MAMAS MT SCE	000-36200-01397	12	32 OZ	\$2.18	15	\$2.70	2.71 %
RAGU G/S SUPER MUSHROOM	000-36200-00445	12	26.0 OZ	\$1.65	16	\$2.22	2.23 %
RAGU RBSTO CHPD TOM&GRLIC	000-36200-01374	12	26.3 OZ	\$1.65	17	\$1.68	1.69 %
PREGO MUSHROOM&GARLIC SAU	000-51000-01212	12	26 OZ	\$1.65	18	\$1.42	1.42 %
PREGO CHNKY TOM & ONION	000-51000-01214	12	26 OZ	\$1.65	19	\$1.42	1.42 %
PREGO XT-CHKY GRDN COMBO	000-51000-05044	12	25.75OZ	\$1.65	20	\$1.42	1.42 %
RAGU SNFRIED TOM SWT BSL	000-36200-00442	12	26.0 OZ	\$1.65	21	\$1.32	1.32 %
BRTOLI 5BROS TOM BASIL	000-36200-00470	12	26 OZ	\$2.14	22	\$1.28	1.29 %
RAGU EXP TRAD TOMATO	000-36200-07770	6	24.7 OZ	\$2.51	23	\$1.19	1.19 %
RAGU RCH&MTY SAUS PPR ON	000-36200-01396	12	32 OZ	\$2.18	24	\$1.02	1.02 %
PRGO TOM BSL & GRLC SCE	000-51000-09324	12	26 OZ	\$1.57	25	\$0.00	0.00 %
PREGO MUSHRM SPAGH SAUC	000-51000-02796	12	26 OZ	\$1.65	26	\$0.00	0.00 %
PREGO ZSTY MSH X/SPCY SCE	000-51000-05045	12	26 OZ	\$1.65	27	\$0.00	0.00 %
Totals for Minor Category: 006AR						\$99.68	100.00 %
Report Totals						\$99.68	



Multiple Date Range Reports

Date Range Differences

Date Range Differences Reports provide the ability to track sales and profitability trends. Category Analyzer allows the user to compare unit movement, tonnage, case movement, dollar sales, and gross profit dollars for multiple time periods and display a percentage increase or decrease.

This type of comparison can be used for comparing:

- Sales increase/decrease for this year vs. last year
- Gross profit increase/decrease by store by quarter
- Increase/decrease in sales for special events or holidays

In this example, a particular brand of cake mixes (Betty Crocker) was requested for store #123 for the First and Second Quarters (custom date ranges).

Notice that the sales and gross profit *dollars* for each item are reported as an increase or decrease over the first quarter (in addition to the percentage increase/decrease over the first quarter).

For example, *BC Lemon Cake Mix* had a 15.40% increase in sales but a 60.71% decrease in gross profit between the first and second quarters. In total, *Betty Crocker Cake Mixes* had a 23.69% sales increase but a 241.71% decrease in gross profit.

Since the user can control what date ranges appear on the report, this format can be used for days, weeks, months, periods, etc. Since the user can control what date ranges appear on the report, this format can be used for days, weeks, months, periods, etc.



Featured Report: Betty Crocker Sales & Gross Profit Compare by Qtr

Description	Item Information			Movement Data				Second Quarter						
	UPC	Order Number	Pack	Size	First Quarter		Second Quarter		Sales Diff (%)	GP Diff (%)				
					Sales \$	GP\$	Sales \$	GP\$						
Store Number: 00123 (#123) Brand Code: BC_CAKES (Betty Crocker Cake Mixes)														
BC PINEAPPLE CAKE	000-16000-27940	255174	12	18.25OZ.	\$12.87	\$1.82	\$6.93	(\$3.22)	-46.15 %	-276.92 %				
BC STRAWBERRY CAKE	000-16000-27950	255190	12	18.25OZ.	\$7.92	\$1.12	\$15.46	(\$4.84)	95.20 %	-532.14 %				
BC WHITE CAKE MIX	000-16000-43030	255505	12	18.25OZ	\$26.77	\$4.22	\$21.21	(\$6.34)	-20.77 %	-250.24 %				
BC CHOC BTR CKE MX	000-16000-43040	254540	12	18.2Z	\$13.29	\$2.14	\$19.84	(\$3.36)	49.29 %	-257.01 %				
BC GLDEN MST GLDN VAN CK	000-16000-43100	254680	12	18.25 OZ	\$10.32	\$1.72	\$16.07	(\$2.78)	55.72 %	-261.63 %				
BC YELLOW CAKE MIX	000-16000-43130	255570	12	18.25OZ	\$25.02	\$4.32	\$12.49	(\$3.46)	-50.08 %	-180.09 %				
BC DEVILS FOOD CK MIX	000-16000-43230	254664	12	18.25OZ	\$6.93	\$0.98	\$14.66	(\$5.64)	111.54 %	-675.51 %				
BC GERMAN CHOC CK MIX	000-16000-43300	254946	12	18.25OZ	\$10.70	\$1.60	\$26.35	(\$9.90)	146.26 %	-718.75 %				
BC SUPER MST RBO CHIP CK	000-16000-43500	254953	12	18.3 OZ	\$14.70	\$2.60	\$27.38	\$3.16	86.26 %	21.54 %				
BC CHO FDGE SUPREME CK	000-16000-43600	254649	12	18.25OZ	\$11.69	\$1.74	\$11.12	(\$0.48)	-4.88 %	-127.59 %				
BC CARROT CAKE MIX	000-16000-43620	254573	12	18.00OZ	\$9.71	\$1.46	\$4.95	(\$2.30)	-49.02 %	-257.53 %				
BC LEMON CAKE MIX	000-16000-43630	255158	12	18.25OZ	\$3.96	\$0.56	\$4.57	\$0.22	15.40 %	-60.71 %				
BC BITTR PCN SM CAKE MIX	000-16000-43740	254599	12	18 OZ	\$4.95	\$0.70	\$7.92	(\$3.68)	60.00 %	-625.71 %				
BC BUTTER YELLOW CK MIX	000-16000-43950	254557	12	18.25OZ	\$6.93	\$0.98	\$13.67	(\$5.18)	97.26 %	-628.57 %				
BC PINAPL UPSIDE DWN	000-16000-43970	255885	12	21.5Z	\$2.99	\$0.85	\$5.98	\$1.70	100.00 %	100.00 %				
BC WHITE ANGEL FD CK MI	000-16000-44030	255737	12	16.00OZ	\$9.08	\$3.04	\$11.35	\$3.80	25.00 %	25.00 %				
BC GOLD POUND CAKE	000-16000-45410	255745	12	16.00OZ	\$0.00	\$0.00	\$0.00	\$0.00	0.00 %	0.00 %				
Totals for Brand Code: BC_CAKES					\$177.83	\$29.85	\$219.95	(\$42.30)	23.69 %	-241.71 %				
Report Totals					\$177.83	\$29.85	\$219.95	(\$42.30)	23.69 %	-241.71 %				



Multiple Date Range Reports

Date Range Comparisons

Date Range Comparisons Reports allow the user to display the same movement related fields for each time period of interest. The user can select any number of date ranges to be displayed such as:

- Day
- Week
- Month
- Quarter
- Year

Each of the selected movement fields (units, tonnage, cases, cost, retail, etc.) will be displayed for each date range, with an optional grand total for all date ranges.

In this example, the units sold and average retail are displayed for each item carried by a selected vendor (Pepperidge Farms) for the months of January, February, March and April. A grand total column for all four months combined is also available at the far right of the report.

Notice that *PF Goldfish Cracker Cheddar Cheese* sold 10 units, 22 units, 11 units, and 16 units for the months requested. Overall, for the 4 months selected, this item sold 59 units total. The vendor's total units sold by month appear at the bottom of each month's column.

This particular report was created using a special aggregate called "Company Totals", which is a system calculated total for every item carried in the entire chain (for every movement date). This special aggregate allows the user fast access to company totals by item without having to process each individual store to obtain a total.

Note: Instead of creating this report for the entire chain, a single store or group of stores could have been selected. In addition, days or weeks could have been used for the date columns instead of months.



Featured Report: Pep Farms – Total Chain Sales & Units by Month

Description	Movement Data				Grand Total					
	1/1/2003 to 1/31/2003	2/1/2003 to 2/28/2003	3/1/2003 to 3/31/2003	4/1/2003 to 4/30/2003						
	Units Sold	Avg Retail	Units Sold	Avg Retail	Units Sold	Avg Retail	Units Sold	Avg Retail		
Store Number: 0290600 (Company Totals)										
Vendor Number: 0290600 (PEP FARM COOKIES)										
PF GOLDFISH CRACKERS CHED CHSE	10	\$1.79	22	\$1.79	11	\$1.79	16	\$1.79	59	\$1.79
PEP FARM CHESAPEAKE COOKIE	5	\$2.69	4	\$2.69	3	\$2.69	7	\$2.69	19	\$2.69
SAUSALITO COOKIES	4	\$2.69	4	\$2.69	3	\$2.69	4	\$2.69	15	\$2.69
PF GOLDFISH CRACKERS ORIGINAL	2	\$1.79	8	\$1.79	1	\$1.79	2	\$1.79	13	\$1.79
PF GOLDFISH CRACKERS PIZZA	1	\$1.79	6	\$1.79	3	\$1.79	2	\$1.79	12	\$1.79
GOLDFISH COLORS	0	\$0.00	4	\$1.79	1	\$1.79	3	\$1.79	8	\$1.79
PEPPERIDGE FARM MINT MILANO	1	\$2.69	1	\$2.69	2	\$2.69	3	\$2.69	7	\$2.69
PEP FARM TAHOE COOKIES	2	\$2.69	2	\$2.69	1	\$2.69	1	\$2.69	6	\$2.69
MAINTUCKET COOKIES	1	\$2.69	2	\$2.69	2	\$2.69	1	\$2.69	6	\$2.69
PEP FARM CHEDDAR GOLDFISH	1	\$2.99	0	\$0.00	3	\$2.99	2	\$2.99	6	\$2.99
PEP FARM SB OAT-RAISIN COOKIE	0	\$0.00	3	\$2.69	2	\$2.69	0	\$0.00	5	\$2.69
PEPPERIDGE FARM ORANGE MILANO	2	\$2.69	1	\$2.69	0	\$0.00	2	\$2.69	5	\$2.69
PEPPERIDGE FM DBL CHOC MILANO	2	\$2.69	2	\$2.69	1	\$2.69	0	\$0.00	5	\$2.69
PF GOLDFISH CHEDDAR GIANT	1	\$2.99	4	\$2.99	0	\$0.00	0	\$0.00	5	\$2.99
PEPPERIDGE FARM BRUSSELS	0	\$0.00	1	\$2.69	1	\$2.69	2	\$2.69	4	\$2.69
PEP FARM GOLDFISH CHEDDAR	0	\$0.00	0	\$0.00	2	\$5.99	1	\$5.99	3	\$5.99
PEPPERIDGE FARM SELECTION NINE	1	\$4.99	1	\$4.99	1	\$4.99	0	\$0.00	3	\$4.99
GOLDFISH VARIETY ON THE GO	2	\$2.49	0	\$0.00	1	\$2.49	0	\$0.00	3	\$2.49
PEPPERIDGE FARM BORDEAUX	0	\$0.00	0	\$0.00	1	\$2.69	1	\$2.69	2	\$2.69
PEPPERIDGE FARM MILANO	2	\$2.69	0	\$0.00	0	\$0.00	0	\$0.00	2	\$2.69
PEPPERIDGE FARM GENEVA	1	\$2.69	0	\$0.00	1	\$2.69	0	\$0.00	2	\$2.69
PEPPERIDGE FARM GINGERMAN	1	\$2.29	0	\$0.00	0	\$0.00	1	\$2.29	2	\$2.29
PEPPERIDGE FARM APRCT RASPBERRY	0	\$0.00	0	\$0.00	0	\$0.00	2	\$2.69	2	\$2.69
PEPPERIDGE FARM BUTTER CHESMEN	0	\$0.00	0	\$0.00	1	\$2.69	0	\$0.00	1	\$2.69
PEPPERIDGE FARM LMON-NUT CRNCH	0	\$0.00	1	\$2.29	0	\$0.00	0	\$0.00	1	\$2.29
PEPPERIDGE FARM STRAWBERRY	0	\$0.00	0	\$0.00	0	\$0.00	1	\$2.69	1	\$2.69
GOLDFISH CHEDDAR ON THE GO	0	\$0.00	0	\$0.00	0	\$0.00	1	\$2.49	1	\$2.49
Totals for Vendor Number: 0290600	39		66		41		52		198	
Report Totals	39		66		41		52		198	



Exception Reports

Negative Gross Profit Items

The ability to provide the filter Exception Reports by specific criteria / information is a powerful feature that exists for every report that is generated by Category Analyzer.

Nearly every column that is available for reporting can be filtered by the user in some way. This is extremely useful when producing exception reports that are key to managing profitability.

Category Analyzer's filtering capability has very robust selection criteria that allows user to create reports such as:

- All items with a negative gross profit for last month, week, or year
- Any item/category/department with a sales decline over last week
- Items with sales in excess of a specified amount
- Items with unit movement below a threshold needed to maximize inventory turns
- Items with a gross profit percent between two values
- And numerous other variations

In this Negative Gross Profit Items Report sample, the user requested any Soda 3 Liter item carried by store #145 that had a negative gross profit for the month of May. In addition to the units sold, gross profit dollars, and gross profit percentage, the average cost and average retail for each item during the month are also shown (since cost and retail can change multiple times in a given month).



Featured Report: 3 Liters with Negative Gross Margin for May

Description	Item Information		Movement Data						
	UPC	Pack	Size	Report Rank	Units Sold	Avg Cost	Avg Retail	GP\$	GP%
Store Number: 00145									
Minor Category: SODA3L (DSD 3 LITER SODAS)									
MINUTE MAID ORANGE 3LITER	000-49000-01180	6	101.4 OZ	1	7	\$1.40	\$1.33	(\$0.47)	-5.00 %
RED FLASH SODA 3 LITER BOTTLE	000-49000-02754	6	101.4 OZ	2	7	\$1.40	\$1.33	(\$0.47)	-5.00 %
DIET COKE 3 LITER	000-49000-01134	6	101.4 OZ	3	31	\$1.40	\$1.33	(\$2.07)	-5.00 %
DIET COKE CAFFIENE FREE 3 LTR	000-49000-01137	6	101.4 OZ	4	6	\$1.40	\$1.33	(\$0.40)	-5.00 %
COCA COLA CLASSIC 3 LITER	000-49000-01259	6	101.4 OZ	5	168	\$1.40	\$1.33	(\$11.21)	-5.00 %
SPRITE 3 LITER	000-49000-01139	6	101.4 OZ	6	46	\$1.40	\$1.33	(\$3.07)	-5.00 %
DR PEPPER 3 LITER	000-78000-08247	6	101.4OZ	7	86	\$1.44	\$1.33	(\$8.89)	-7.76 %
DIET DR PEPPER 3 LITER	000-78000-08347	6	101.4OZ	8	21	\$1.44	\$1.33	(\$2.17)	-7.76 %
Totals for Minor Category: SODA3L					372			(\$28.74)	-5.79 %
Report Totals					372			(\$28.74)	-5.79 %



Exception Reports

Purchases vs. Sales

The Purchases vs. Sales Report is a special type of exception report that allows a retailer to measure purchasing trends. This report is available to those retailers that use Category Analyzer to import purchase history in addition to movement history.

The user has control over what subset of items and stores are used to drive the report (true of all reports in the system). Every item on the report can display the units purchased, units sold, in addition to differences measured in units, sales, and percentage.

This report can be a key indicator of areas that might need monitoring due to consistent trends of purchasing more inventory than is actually sold.

Users can also take advantage of the filtering capabilities of the system to create exception reports for items that have a Purchase vs. Sales variance over a particular threshold.

In this example, the “Beer 12pks Category” for store #102 during the month of March is being reviewed.

Each item displays the units received and the units sold during the month of March for this store. In addition, the inventory variance in units and dollars is calculated by item (and in total).

For example, *Miller Lite 12pk Cans* shows the store purchased 46 more units than were sold during the month. The *Purchase vs. Sales* (\$) is calculated by multiplying the 46 units X the average retail price during the month.

Note: This report is ranked based on the Purchase vs. Sales (Qty) column so that the item with the highest variance appears first.



Featured Report: Beer 12pk Purchases vs. Sales - March

Description	Item Information		Movement Data					Purch vs Sales (\$)
	UPC	Pack	Size	Report Rank	Units Purchased	Units Sold	Purch vs Sales (Qty)	
Store Number: 00102								
Minor Category: BEER12 (BEER 12PKS)								
MILLER LITE 12PK CANS	000-34100-57602	2 12 12OZ	2 12 12OZ	1	60	14	46.00	\$436.54
BUDWEISER 12PK 12OZ LNNR	000-18200-00771	2 12 12OZ	2 12 12OZ	2	30	3	27.00	\$253.53
BUDWEISER LT 12PK 12OZ LNNR	000-18200-00769	2 12 12OZ	2 12 12OZ	3	48	23	25.00	\$234.75
NATURAL LIGHT 12 PK CANS	000-18200-15047	2 12 12OZ	2 12 12OZ	4	42	24	18.00	\$113.22
MILWAUKEE'S BEST LIGHT 12PK	000-34100-07602	2 12 12OZ	2 12 12OZ	5	30	21	9.00	\$55.71
MILLER LITE 12PK LNNR	000-34100-57509	2 12 12OZ	2 12 12OZ	6	16	8	8.00	\$75.92
SAM ADAMS LNNR	000-87692-10012	4 6 12OZ	4 6 12OZ	7	12	4	8.00	\$50.32
MILLER HIGH LIFE 12PK LNNR	000-34100-01509	2 12 12OZ	2 12 12OZ	8	18	11	7.00	\$50.33
BUSCH BEER 12PK CANS	000-18200-61047	2 12 12OZ	2 12 12OZ	9	14	7	7.00	\$54.53
COORS LIGHT 12PK CANS	000-71990-00048	2 12 12OZ	2 12 12OZ	10	22	16	6.00	\$53.34
MODELO ESPECIAL 12 PK CAN	000-80660-95715	2 12 12 OZ	2 12 12 OZ	11	6	2	4.00	\$37.16
MILLER GENUINE DRAFT 12PK LNNR	000-34100-17509	2 12 12OZ	2 12 12OZ	12	8	4	4.00	\$37.96
OLD MILWAUKEE NA 12PK CANS	000-52300-02545	2 12 12OZ	2 12 12OZ	13	8	4	4.00	\$27.16
SMIRNOFF ICE 12PK LNNR BOTTLES	000-82000-72518	2 12 12 OZ	2 12 12 OZ	14	4	1	3.00	\$40.47
BUDWEISER 12 PK CANS	000-18200-11047	2 12 12OZ	2 12 12OZ	15	14	11	3.00	\$28.17
MILWAUKEES BEST 12PK CANS	000-34100-31602	2 12 12OZ	2 12 12OZ	16	24	22	2.00	\$12.38
PEARL LIGHT 12 PK CANS	000-71440-02542	2 12 12 OZ	2 12 12 OZ	17	2	0	2.00	\$0.00
SCHLITZ 12PK CANS	000-52300-01540	2 12 12OZ	2 12 12OZ	18	2	1	1.00	\$5.89
SHINER BOCK 12PK LNNR BOTTLES	000-88573-43333	2 12 12 OZ	2 12 12 OZ	19	4	3	1.00	\$11.19
CORONA LIGHT 12PK LNNR	000-80660-95675	2 12 12OZ	2 12 12OZ	20	4	4	0.00	\$0.00
DOS EQUIS 12 PK LNNR	000-72311-23012	2 12 12OZ	2 12 12OZ	21	2	2	0.00	\$0.00
COORS REGULAR 12PK CANS	000-71990-00047	2 12 12OZ	2 12 12OZ	22	4	4	0.00	\$0.00
COORS LIGHT 12PK 12OZ LNNR	000-71990-30069	2 12 12OZ	2 12 12OZ	23	8	8	0.00	\$0.00
LONE STAR 12 PK CAN	000-73360-18341	2 12 12 OZ	2 12 12 OZ	24	24	26	-2.00	(\$11.78)
LONE STAR LIGHT 12 PK CANS	000-73360-19341	2 12 12 OZ	2 12 12 OZ	25	22	24	-2.00	(\$11.78)
BUD LIGHT 12 PACK CANS	000-18200-53047	2 12 12OZ	2 12 12OZ	26	16	20	-4.00	(\$37.56)
Totals for Minor Category: BEER12					444	267	177.00	\$1,517.45
Report Totals					444	267	177.00	\$1,517.45



Exception Reports

Zero Movement

The Zero Movement Report provides the user the ability report on any group of items that have not sold during a specified time period. The user can choose to have the report include a single store, a group of stores or the total company.

This tool can be used to eliminate non-performing items from a store set in order to better manage inventory. In addition, when looking at zero movers for the entire chain, this feature can be used to reduce the number of inactive items that are present in the item file.

In this example, Archway items that have not sold anywhere in the chain for last month are being displayed.

This report can be created by store, category, price link, brand, as well as many others.



Featured Report: Archway Cookies – Zero Movers for Last Month

Description	Item Information			Movement Data
	UPC	Pack	Size	Last Month
Store Number: CMPNY (Company Totals)				
Vendor Number: 0020200				
ARCHWAY MOLASSES	000-27500-02077	1	16 OZ	0
ARCHWAY GINGER SNAPS	000-27500-04076	1	16 OZ	0
ARCHWAY MOLASSES COOKIES	000-27500-07136	1	11 OZ	0
ARCHWAY FROSTY LEMON	000-27500-61333	1	11 OZ	0
ARCHWAY OATMEAL	000-27500-61396	1	15.75 OZ	0
ARCHWAY COCONUT MACAROON	000-27500-61400	1	13.75 OZ	0
ARCHWAY OLD FASHION WINDMILL	000-27500-61439	1	12.5 OZ	0
ARCHWAY SUGAR FREE OATMEAL	000-27500-61566	1	6.75 OZ	0
ARCHWAY OATMEAL RAISIN	000-27500-71310	1	11 OZ	0
ARCHWAY OATMEAL RAISIN SUPER	000-27500-71311	1	16 OZ	0
Totals for Vendor Number: 0020200				0
Report Totals				0



Special Format Reports

Store Ranking by Item

Store Ranking Reports give multi-store retailers the ability to rank each store individually based on their performance for specific items during a specific date range.

This report format allows the user to create a report for a group of items and display the details by store. The stores can be ranked based on a variety of factors such as:

- Gross Profit Dollars
- Sales Dollars
- Cases Sold
- Units Sold

In addition to displaying details by store, the chain totals for each date range for each item are also computed.

In this example, two *Kraft Cream Cheese* items are displayed with store details for the Calendar Year of 2003.

Each store's units sold, average retail, sales dollars, gross profit dollars, and gross profit percent for 2003 are displayed. The company totals for each item for the year are also displayed.

For example, store #145 sold the most units of *KFT Philly Cream Cheese 3oz* during the calendar year (64) and therefore is ranked as the number 1 store for this item. In addition, the total chain movement for the item is displayed below the stores (314 for this item).

This format continues for every item on the report. A grand total of all items for all stores is also computed (702 units total).



Featured Report: Craft Cream Cheese – Ranked by Store Sales

Store Name	Report Rank	Movement Data		Sales \$	GP\$	GP%
		Units Sold	Avg Retail			
UPC: 000-21000-00001 KFT PHILLY CREAM CHEESE		3 OZ				
Mikes IGA #145	1	64	\$0.85	\$54.40	\$14.96	27.50 %
Food 4 Less #128	2	62	\$0.84	\$51.86	\$13.58	26.18 %
Food 4 Less #123	3	45	\$0.85	\$38.25	\$10.66	27.86 %
Food 4 Less #127	4	45	\$0.85	\$38.25	\$10.34	27.04 %
Mikes IGA #102	5	35	\$0.85	\$29.75	\$8.14	27.35 %
Mikes IGA #143	6	23	\$0.85	\$19.55	\$5.29	27.07 %
Mikes IGA #117	7	18	\$0.85	\$15.30	\$4.25	27.78 %
Food 4 Less #126	8	14	\$0.85	\$11.90	\$3.23	27.14 %
Mikes IGA #107	9	8	\$0.85	\$6.80	\$1.67	24.51 %
Mikes IGA #109	10	0	\$0.00	\$0.00	\$0.00	0.00 %
Totals for UPC: 000-21000-...		314		\$266.06	\$72.11	27.10 %
UPC: 000-21000-00014 KFT SFT PHILLY CREAM CHES		8.00OZ				
Food 4 Less #128	1	88	\$1.59	\$139.75	\$32.57	23.31 %
Mikes IGA #102	2	74	\$1.77	\$131.32	\$40.13	30.56 %
Mikes IGA #145	3	54	\$1.75	\$94.69	\$27.20	28.72 %
Mikes IGA #143	4	40	\$1.76	\$70.24	\$21.46	30.55 %
Food 4 Less #123	5	33	\$1.72	\$56.62	\$15.61	27.57 %
Mikes IGA #109	6	28	\$1.76	\$49.32	\$14.72	29.84 %
Mikes IGA #107	7	23	\$1.75	\$40.21	\$11.95	29.71 %
Food 4 Less #127	8	22	\$1.71	\$37.56	\$10.64	28.34 %
Mikes IGA #117	9	18	\$1.82	\$32.82	\$10.30	31.37 %
Food 4 Less #126	10	8	\$1.94	\$15.52	\$5.19	33.46 %
Totals for UPC: 000-21000-...		388		\$668.05	\$189.77	28.41 %
Report Totals		702		\$934.11	\$261.88	28.04 %



Special Format Reports

Movement Type Detail

Movement Type Detail Reports track the type of price (regular, sale, Manager's special, etc.) that was in effect for each movement date (provided by a back office interface), in addition to tracking historical retail, cost, and units sold by store and item. This gives the system the ability to report details or totals by movement type. With this information, a retailer can be aware of what types of prices are driving their sales and profitability.

This report can be created for any group of items, stores, and dates.

In this example, Calendar Year 2003 movement was requested for store #127 for the Tomato Sauce category. Below each item's grand total, a breakdown by movement type is presented.

For example, *BY Tomato Sauce* shows a total of 1,811 units sold during 2003. Below the item description, the details for Regular Price, TPR Price, and Sale Price are visible. This allows the user to measure units sold, dollar sales, and gross profit generated at the various types of prices for an item.

In this example, Regular Price movement generated the most gross profit dollars with \$30.84 during the year. In addition, the average Regular price of the item during the year was \$0.22.

With this type of information a retailer can examine which pricing strategies are driving sales and gross profit.



Featured Report: Tomato Sauces – With Movement Type Detail

Description		Item Information			Movement Data				
Store Number: 00127 (#127)	UPC	Pack	Size	Report Rank	Units Sold	Avg Retail	Sales \$	GP \$	GP%
Minor Category: 006AX (TOMATO SAUCES)									
BY TOMATO SAUCE	000-42187-40670	48	8 OZ.	1	1,811	\$0.20	\$354.15	\$50.57	14.28 %
Details									
Type	Calendar Year 2003	Units Sold	Avg Retail	Sales \$	GP \$	GP%			
Regular Movement		727	\$0.22	\$159.94	\$30.84	19.28 %			
TPR Movement		227	\$0.20	\$45.40	\$15.12	33.30 %			
Sale Movement		857	\$0.17	\$148.81	\$4.61	3.10 %			
BEST YET TOMATO SAUCE									
	000-42187-40672	24	15 OZ.	2	36	\$0.49	\$17.62	\$4.78	27.13 %
Details									
Type	Calendar Year 2003	Units Sold	Avg Retail	Sales \$	GP \$	GP%			
Regular Movement		29	\$0.50	\$14.50	\$4.04	27.89 %			
TPR Movement		7	\$0.45	\$3.12	\$0.74	23.63 %			
BY TOM PUREE									
	000-42187-40675	12	29 OZ	3	8	\$1.10	\$8.76	\$3.45	39.40 %
Details									
Type	Calendar Year 2003	Units Sold	Avg Retail	Sales \$	GP \$	GP%			
Regular Movement		8	\$1.10	\$8.76	\$3.45	39.40 %			
Totals for Minor Category: 006AX					1,855		\$380.53	\$58.80	15.45 %
Report Totals					1,855		\$380.53	\$58.80	15.45 %



Drill-down Reports

Drill-down Category Contribution

Drill-down Reports provide summarized data by store, major/minor department, and major/minor category for faster processing of reports that are not item specific. This can be used to examine trends or find exceptions at a high level and continue to drill-down into the details.

The sales and gross profit contribution measure how much each category is contributing to the overall totals by department. The sales contribution percentage is calculated by dividing the category sales by the sales for the department (gross profit works the same way).

This style of report can be created for a variety of different levels such as store, chain, department, etc.

In this example, the Beer/Wine Department for stores #102 and #143 is being displayed for the Calendar Year of 2003. Each category that has sales in the Beer/Wine department is reported by store with its accumulated sales and gross profit for the year.

The percentage of each category's sales and gross profit to the department total is calculated. For example, *Beer Suitcases* had \$50,994.19 worth of sales in store #102, which represented 28.78% of the total department sales for the store.

In addition, store #102 had total departmental sales of \$177,204.88 which represented 67.81% of the total sales for the report.



Featured Report: Beer Dept – Drill-down Sales & Gross Profit Contribution

	Item Informat...	Movement Data			
		Calendar Year 2003			
Minor Catg Name	Report Rank	Sales \$	Sales Contribution%	GP\$	GP Contribution%
Minor Department: 103 (BEER/WINE)					
Store Number: 00102					
BEER SUITCASES	1	\$50,994.19	28.78 %	\$6,481.94	22.06 %
BEER 12PKS	2	\$33,227.68	18.75 %	\$5,003.98	17.03 %
BEER 6PKS	3	\$31,119.62	17.56 %	\$6,272.50	21.35 %
WINE	4	\$28,767.71	16.23 %	\$7,612.23	25.91 %
BEER 18 PACKS	5	\$26,880.21	15.17 %	\$2,819.71	9.60 %
BEER MISC	6	\$3,158.60	1.78 %	\$425.05	1.45 %
WINE COOLERS	7	\$1,966.18	1.11 %	\$488.47	1.66 %
BEER QUARTS	8	\$1,090.69	0.62 %	\$280.24	0.95 %
Totals for Store Number: 0...		\$177,204.88	67.81 %	\$29,384.12	67.72 %
Store Number: 00143 (Mikes IGA #143)					
BEER 18 PACKS	1	\$22,892.53	27.21 %	\$2,472.68	17.65 %
BEER 12PKS	2	\$17,319.63	20.59 %	\$2,602.06	18.57 %
BEER 6PKS	3	\$17,226.51	20.48 %	\$3,482.03	24.85 %
WINE	4	\$12,158.56	14.45 %	\$3,200.64	22.85 %
BEER SUITCASES	5	\$11,594.21	13.78 %	\$1,562.71	11.15 %
BEER QUARTS	6	\$1,561.00	1.86 %	\$431.72	3.08 %
BEER MISC	7	\$859.99	1.02 %	\$130.89	0.93 %
WINE COOLERS	8	\$513.35	0.61 %	\$126.92	0.91 %
Totals for Store Number: 0...		\$84,125.78	32.19 %	\$14,009.63	32.28 %
Report Totals		\$261,330.66		\$43,393.75	



Drill-down Reports

Drill-down Date Range Comparisons

Drill-down Date Range Comparison Reports use summarized data, to measure the amount of increase or decrease in sales and gross profit between multiple time periods for stores, departments, categories, etc.

As the user drills-down into each level, more and more detailed data is displayed. This gives the user the ability to focus only on the particular area that needs attention.

In this example, sales and gross profit between the first and second quarters are being examined for one store. This report was defined to begin at the Major Department Level and display the minor departments and categories that are part of Grocery. Each category displays its sales and gross profit dollars for the first and second quarters. In addition, the percentage increase/decrease is calculated for each category, store, minor department, and major department.

For example, the “Lowfat Milk” category had a sales increase of 25.59% in the second quarter, while the gross profit shows a 25.16% decline. The Grocery Department total sales are up 21.37% in the second quarter and the gross profit is up 14.55%.

The user has the ability to Drill-down into the details for any category that has values in an unacceptable range. In addition, a filter could be setup on the Sales Difference Percent column so that only those categories that had a sales decline are displayed.



Featured Report: Dairy Dept – Sales & Gross Profit Quarterly Compare

Minor Catg Name	Movement Data					
	First Quarter		Second Quarter		Sales Diff (%)	GP Diff (%)
	Sales \$	GP\$	Sales \$	GP\$		
Major Department: 10 (Grocery)						
Minor Department: 101 (DAIRY)						
Store Number: 00128 (#128)						
FRUIT JUICES - MISC	\$67.91	\$20.24	\$215.71	\$64.95	217.64 %	220.85 %
BREADS	\$23.24	\$9.17	\$62.14	\$23.92	167.38 %	160.85 %
CTTGE CHSE,SOUR CRM,H&H,TOPP	\$561.37	\$165.20	\$1,402.73	\$437.29	149.88 %	164.70 %
MILK SHAKES	\$5.07	\$1.53	\$11.83	\$3.57	133.33 %	133.33 %
FLAVORED CREAM CHEESE	\$25.83	\$6.35	\$59.59	\$23.57	130.70 %	271.31 %
PUDDINGS	\$262.39	\$93.48	\$489.32	\$165.99	86.49 %	77.55 %
DSD DAIRY DIPS	\$36.54	\$11.01	\$66.33	\$20.10	81.53 %	82.56 %
YOGURTS - DRINKABLE	\$77.25	\$23.62	\$128.46	\$39.46	66.29 %	67.06 %
YOGURTS - MISCELLANEOUS	\$17.82	\$4.37	\$27.21	\$6.57	52.69 %	50.45 %
SOFT/WHIPPED BUTTER	\$49.21	\$19.15	\$71.30	\$28.01	44.89 %	46.23 %
AEROSOL TOPPING	\$89.64	\$28.80	\$124.68	\$36.80	39.09 %	27.78 %
EGG SUBSTITUTES	\$68.36	\$26.21	\$92.86	\$35.11	35.84 %	33.95 %
EGGS	\$3,383.85	\$750.09	\$4,276.86	\$897.74	26.39 %	19.68 %
LOWFAT MILK	\$2,355.33	\$577.44	\$2,958.00	\$432.14	25.59 %	-25.16 %
BUTTER QUARTERS/SOLIDS	\$370.91	\$139.02	\$457.21	\$177.94	23.27 %	27.99 %
PROC CHS LOAF/JAR CHS/ETC	\$530.19	\$142.61	\$651.54	\$152.88	22.89 %	7.20 %
DIET/SPECIALTY MARGARINE	\$239.08	\$73.25	\$293.48	\$85.40	22.75 %	16.59 %
YOGURT-SWISS/SUNDAE/CUSTD	\$904.08	\$170.36	\$1,094.43	\$260.78	21.05 %	53.07 %
REFRIG HORSERADISH	\$8.40	\$3.87	\$10.08	\$4.65	20.00 %	20.00 %
DIPS - SOUR CREAM	\$749.68	\$273.37	\$825.33	\$323.13	10.09 %	18.20 %
MRGRN BWLS-SOFT-VGTBL OIL	\$414.87	\$135.83	\$456.19	\$138.98	9.96 %	2.32 %
CREAM CHEESE	\$523.43	\$156.75	\$567.63	\$189.60	8.44 %	20.96 %
MARGARINE QTRS-VEGTBL OIL	\$469.23	\$139.47	\$497.41	\$96.94	6.01 %	-30.49 %
COCOA & PREP DRINK FOODS	\$7.56	\$2.31	\$7.96	\$2.27	5.29 %	-1.59 %
SKIM MILK	\$491.60	\$162.64	\$507.50	\$140.18	3.23 %	-13.81 %
MISC-FLUID MILK PRODUCTS	\$1,090.93	\$338.92	\$1,124.66	\$352.56	3.09 %	4.02 %
DSD 100% FRUIT JUICES	\$206.94	\$56.30	\$210.87	\$64.33	1.90 %	14.26 %
FRUIT PUNCH - MISC	\$1,021.02	\$254.65	\$1,010.36	\$255.76	-1.04 %	0.44 %
ALL DSD MILK ITEMS	\$2,649.32	\$705.87	\$2,568.04	\$684.65	-3.07 %	-3.01 %
MRGRN BWLS-SPREAD-VEG OIL	\$607.60	\$181.69	\$548.07	\$132.07	-9.80 %	-27.31 %
Totals for Store Number: 00128	\$17,308.65	\$4,673.56	\$20,817.78	\$5,277.32	20.27 %	12.92 %
Report Totals	\$17,308.65	\$4,673.56	\$20,817.78	\$5,277.32	20.27 %	12.92 %



Drill-down Reports

Drill-down Sales by Month

Drill-down Sales by Month Reports use the same summarized data described in previous reports to analyze data for multiple time periods without measuring increase/decrease. The user can select which time periods are displayed on the report and whether or not there is a grand total calculated for the date ranges.

In this example, sales and gross profit dollars are displayed by month for January – March, as well as a grand total for all 3 months combined.

The report begins at the Company Total level and allows the user to drill down one level at a time as follows:

Company Totals

Major Department (Grocery)

Minor Department (Dairy)

Category (Eggs, Milk, etc.)

Notice that there is a total for sales and gross profit dollars at each level described above for each month.



Featured Report: Monthly Sales by Major Department

Minor Catg Name	1/1/2003 to 1/31/2003			2/1/2003 to 2/28/2003			3/1/2003 to 3/31/2003			Grand Total		
	Sales \$	GP%	GP\$	Sales \$	GP%	GP\$	Sales \$	GP%	GP\$	Sales \$	GP%	GP\$
Movement Data												
Store Number: CHIPNY (Company Totals)												
Major Department: 10 (Grocery)												
Minor Department: 101 (DAIRY)												
EGGS	\$8,868.94	25.90 %	\$2,296.69	\$8,087.88	13.38 %	\$1,081.93	\$9,505.20	23.34 %	\$2,218.55	\$26,462.02	21.15 %	\$5,597.17
LOWFAT MILK	\$6,814.74	22.94 %	\$1,563.40	\$6,265.08	23.52 %	\$1,473.57	\$6,257.35	20.36 %	\$1,273.90	\$19,337.17	22.29 %	\$4,310.86
HOMO MILK	\$5,698.56	23.68 %	\$1,349.39	\$5,465.42	25.51 %	\$1,394.49	\$6,532.36	-0.91 %	(\$59.23)	\$17,696.34	15.17 %	\$2,684.65
ALL DSD MILK ITEMS	\$4,819.06	28.23 %	\$1,360.19	\$4,592.06	26.53 %	\$1,218.39	\$5,035.59	25.23 %	\$1,270.29	\$14,446.71	26.64 %	\$3,848.87
CHILL CARTON ORANGE JUICE	\$3,066.53	27.76 %	\$851.18	\$3,031.05	24.45 %	\$741.13	\$3,230.27	16.77 %	\$541.85	\$9,327.85	22.88 %	\$2,134.16
Totals for Minor Department: 101	\$29,267.83	25.35 %	\$7,420.84	\$27,441.49	21.53 %	\$5,909.50	\$30,560.77	17.16 %	\$5,245.36	\$87,270.09	21.29 %	\$18,575.70
Minor Department: 102 (FROZEN,ICE CREAM)												
ICE CREAM/FROZEN YOGURT	\$7,265.08	26.20 %	\$1,903.22	\$7,263.14	26.30 %	\$1,910.09	\$7,131.30	26.49 %	\$1,889.14	\$21,659.52	26.33 %	\$5,702.45
PREMIUM ICE CREAM	\$2,883.90	34.95 %	\$1,008.01	\$4,695.88	39.54 %	\$1,856.74	\$4,256.35	36.44 %	\$1,551.05	\$11,836.13	37.31 %	\$4,415.80
DSD FROZEN PIZZA	\$3,835.84	24.52 %	\$940.45	\$3,979.86	4.14 %	\$164.92	\$2,942.23	28.35 %	\$834.17	\$10,757.93	18.03 %	\$1,939.54
DSD BAGGED ICE	\$3,330.92	40.66 %	\$1,354.27	\$2,211.73	40.59 %	\$897.78	\$1,732.06	40.57 %	\$702.61	\$7,274.71	40.62 %	\$2,954.66
MISC PIZZA/SNACKS	\$1,508.83	33.40 %	\$503.98	\$2,811.27	27.31 %	\$767.80	\$1,758.30	27.25 %	\$479.08	\$6,078.40	28.80 %	\$1,750.86
Totals for Minor Department: 102	\$18,824.57	30.33 %	\$5,709.93	\$20,961.88	26.70 %	\$5,597.33	\$17,820.24	30.62 %	\$5,456.05	\$57,606.69	29.10 %	\$16,763.31
Major Department: 30 (Meat)												
Minor Department: 301 (LUNCH MEAT,CHEESE)												
NATURAL CONSTANT WEIGHT	\$5,146.93	41.90 %	\$2,156.80	\$4,493.82	40.65 %	\$1,826.57	\$5,182.35	42.36 %	\$2,195.47	\$14,823.10	41.68 %	\$6,178.83
PROC CHEESE/INDIVID WRAP	\$4,668.35	37.36 %	\$1,744.21	\$4,076.06	43.06 %	\$1,755.19	\$3,994.45	37.48 %	\$1,497.06	\$12,738.86	39.22 %	\$4,996.46
BRANDED SMOKED SAUSAGE	\$4,099.53	34.16 %	\$1,400.24	\$3,685.38	24.76 %	\$912.40	\$3,585.06	35.45 %	\$1,270.73	\$11,369.97	31.52 %	\$3,583.37
NATURAL SHREDDED CHEESE	\$3,492.69	47.78 %	\$1,668.96	\$3,530.14	48.40 %	\$1,708.67	\$3,365.64	48.37 %	\$1,628.09	\$10,388.47	48.19 %	\$5,005.72
PEG LUNCHMEATS	\$3,084.50	32.79 %	\$1,011.30	\$3,205.87	36.84 %	\$1,181.13	\$3,766.22	27.54 %	\$1,037.06	\$10,056.58	32.11 %	\$3,229.49
Totals for Minor Department: 301	\$20,491.99	38.95 %	\$7,981.50	\$18,991.27	38.88 %	\$7,383.96	\$19,893.72	36.35 %	\$7,628.41	\$59,376.98	38.73 %	\$22,993.87
Minor Department: 302 (FRESH MEAT)												
CHUCK CUTS	\$91,700.49	99.00 %	\$90,784.42	\$89,366.64	99.31 %	\$88,749.86	\$83,881.65	99.02 %	\$83,055.48	\$264,948.80	99.11 %	\$262,589.80
FROZEN BEST BUY PARTS	\$3,042.90	21.85 %	\$664.93	\$527.60	46.41 %	\$244.86	\$588.90	45.90 %	\$270.29	\$4,159.40	28.37 %	\$1,180.08
LOIN CUTS	\$25.51	100.00 %	\$25.51	\$245.42	100.00 %	\$245.42	\$95.94	100.00 %	\$95.94	\$366.87	100.00 %	\$366.87
BREADED PATTIES	\$13.95	32.26 %	\$4.50	\$47.43	32.26 %	\$15.30	\$27.90	32.26 %	\$9.00	\$89.28	32.26 %	\$28.80
OFFAL	\$5.98	37.46 %	\$2.24	\$2.99	37.46 %	\$1.12	\$5.98	37.46 %	\$2.24	\$14.95	37.46 %	\$5.60
Totals for Minor Department: 302	\$94,788.83	96.51 %	\$91,481.60	\$89,256.56	98.96 %	\$88,432.95	\$84,600.37	98.62 %	\$83,432.95	\$269,579.30	97.99 %	\$264,171.15
Report Totals	\$163,373.22	68.92 %	\$112,593.88	\$157,584.72	68.63 %	\$108,147.35	\$152,875.10	66.57 %	\$101,762.76	\$473,833.06	68.06 %	\$322,504.03



Drill-down Reports

Drill-down by Movement Type

Drill-down by Movement Type Reports use the same summarized data used in previous reports to analyze sales and gross profit by movement type. Category Analyzer tracks historical cost, retail, movement, and the type of movement in effect by day (supplied by a back office system).

The user can create reports with sub-totals for each type of movement, such as: regular price, sale, manager's special, etc.

In this example, sales, gross profit dollars, and gross profit percent are displayed by department & category for the 2003 Calendar Year.

For example, there was \$14,573.91 worth of sales generated in the *DSD 12PK Sodas* category at regular price.

In addition, TPR Movement generated \$141,332.57 worth of sales for the total chain during the calendar year of 2003.



Featured Report: Soda Dept Sales – Drill-down by Movement Type

Movement Data			
Calendar Year 2003			
Minor Catg Name	Sales \$	GP\$	GP%
Store Number: CMPNY (Company Totals)			
Minor Department: 104 (CARBONATED SOFT DRINKS)			
Movement Type: Regular Movement			
DSD 12PK SODAS CANNED	\$14,573.91	\$1,383.01	9.49 %
DSD 6PK SODAS CANNED	\$5,327.21	\$1,674.39	31.43 %
DSD SODAS 24OZ 6 PACKS	\$810.20	\$89.00	10.98 %
Totals for Movement Type: 1	\$20,711.32	\$3,146.40	15.19 %
Movement Type: TPR Movement			
DSD 12PK SODAS CANNED	\$119,877.00	\$11,104.59	9.26 %
DSD 6PK SODAS CANNED	\$21,410.66	\$6,111.19	28.54 %
DSD SODAS 24OZ 6 PACKS	\$44.91	\$1.71	3.81 %
Totals for Movement Type: 2	\$141,332.57	\$17,217.49	12.18 %
Movement Type: Sale Movement			
DSD 12PK SODAS CANNED	\$103,920.30	(\$20,063.09)	-19.31 %
DSD 6PK SODAS CANNED	\$4,430.22	\$148.20	3.35 %
DSD SODAS 24OZ 6 PACKS	\$654.36	(\$34.44)	-5.26 %
Totals for Movement Type: 3	\$109,004.88	(\$19,949.33)	-18.30 %
Report Totals	\$271,048.77	\$414.56	0.15 %









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