

# development details



December 2005

## Effective in R6V03: Customer Profitability Analysis

A new R6V03 option in Management Central provides users with an effective way to analyze margin dollars and margin percentages. The Customer Profitability screen breaks down margins by category:

- Equipment
- Sales Orders
- Rental
- Shop Parts
- Shop Labor
- Total

These categories can be analyzed according to selected time periods:

- Current Year to Date
- Last Year to Date
- Month to Date
- Rolling 12
- Last Year

As an added bonus, you are able to analyze this data based on the customer's county, township, lot, concession, province/state, equipment rating, territory, salesperson (responsible salesperson, not invoice salesperson), owner, type and location. The screen can also be sorted by descending or ascending margin dollars or margin percentage.

For more information on this software feature and others, contact PFW Client Services at (519) 474-3700, or e-mail [support@pfw.com](mailto:support@pfw.com).

Sort by:  Margin \$  Margin %  
 Sort Order:  Descending  Ascending  
 Analysis By: Rolling 12 (L12)  
 Select Customer Number:   
 Area: Equipment  
 Summarize By: Customer Go >>

Customer Profitability					
Customer	Sales	Cost	Margin \$	Margin %	
Deanna Lewis	5,897,757.00	65,140.04	5,832,616.96	98.90	
Gillian Orr	1,544,943.32	75,769.33	1,469,173.99	95.10	
LESLIE MCKAY	509,805.00	14,262.89	495,542.11	97.20	
Tom Jones	250,000.00	650.00	249,350.00	99.74	
APPLE LAND COUNTRY	219,628.33	5,084.00	214,544.33	97.69	
Doug Flannigan	103,000.00	15,820.65	87,179.35	84.64	
PATRICK W. MILLS	88,450.00	1,800.00	86,650.00	97.97	
JACK ATKINSON	90,000.00	20,743.10	69,256.90	76.95	
SIMON REYNOLD FARMS LTD	498,459.33	450,286.23	48,173.10	9.66	
HILL & HILL FARMS	640,226.35	593,234.57	46,991.78	7.34	
(1 - 10 Of 737)					

Rolling 12 Months - Total Equipment Sales - Summarized by Customer

Sort by:  Margin \$  Margin %  
 Sort Order:  Descending  Ascending  
 Analysis By: Current Month  
 Select Customer Number:   
 Area: Parts  
 Summarize By: Customer Go >>

Customer Profitability					
Customer	Sales	Cost	Margin \$	Margin %	
Derrick Westbroke	920.56	653.48	267.08	29.01	
Gillian Orr	150.83	72.56	78.27	51.89	
DOUG PROUT INC.	267.63	218.43	49.20	18.38	
LARRY HERN	29.15	14.05	15.10	51.80	
RON PROUT	49.02	38.91	10.11	20.62	
CASH CUSTOMER	13.32	6.06	7.26	54.50	
PATRICK W. MILLS	6.66	3.00	3.66	54.95	
DONALD VANCE	6.66	3.00	3.66	54.95	
Ben Kane	7.49	6.79	0.70	9.35	
(1 - 9 Of 9)					

Current Month - Total Parts Sales - Summarized by Customer

Sort by:  Margin \$  Margin %  
 Sort Order:  Descending  Ascending  
 Analysis By: Last YTD  
 Select Customer Number:   
 Area: Parts  
 Summarize By: Salesperson Go >>

Customer Profitability					
Salesperson	Total Customers	Sales	Cost	Margin \$	Margin %
Vandenburg	2	87.08	71.15	15.93	18.29
Wartburg	6	1,667.45	1,294.08	373.37	22.39
Mississauga	5	392.56	295.66	96.90	24.68
Ventville	1	79.06	59.30	19.76	24.99
Richmond	17	26,122.33	19,532.65	6,589.68	25.22
Nashville	6	1,564.47	1,132.54	431.93	27.60
Trenton	7	2,178.90	1,555.96	622.94	28.58
Mitchell	66	35,945.88	24,864.39	11,081.49	30.82
North York	13	1,198.24	826.26	371.98	31.04
Queens	77	30,771.87	21,103.72	9,668.15	31.41
(1 - 10 Of 44)					

Last YTD - Total Parts Sales - Summarized by Salesperson - Sorted from lowest to highest margin %

Sort by:  Margin \$  Margin %  
 Sort Order:  Descending  Ascending  
 Analysis By: Current YTD  
 Select Customer Number:   
 Area: Total  
 Summarize By: Customer Go >>

Customer Profitability					
Customer	Sales	Cost	Margin \$	Margin %	
Deanna Lewis	4,140,714.80	54,230.88	4,086,483.92	98.93	
PATRICK W. MILLS	88,656.66	1,803.00	86,853.66	97.97	
MARK FIELDS	1,519.29	0.00	1,519.29	100.00	
Gillian Orr	9,535.87	8,140.35	1,395.52	14.63	
TAPCO FARMS LTD.	838.05	0.00	838.05	100.00	
DOUG PROUT INC.	4,627.54	4,024.33	603.21	13.04	
PETER BACHNER	424.50	0.00	424.50	100.00	
Derrick Westbroke	920.56	653.48	267.08	29.01	
MURRAY KANE	270.98	10.00	260.98	96.31	
CONCRETE HOLSTEINS INC	378.53	266.50	112.03	29.60	
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Current YTD - Total Sales - Summarized by Customer



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