

e-Synergy MAX Sales Reporting Pages– Product Overview

Overview

The e-Synergy MAX Sales Reporting Pages provides a series of Active Service Pages (ASP) web pages inside e-Synergy that dynamically display MAX sales data from an e-Synergy “start page” with the following categories of information:

- Sales Order “Bookings”
- Sales Order “Backlog”
- Shipments
- Invoices

For each of these categories of data, the following breakdowns are available:

- By Sales Rep,
- By Territory,
- By Product Line, or
- By Customer

Within these breakdowns, the user can select:

- All of the items in the category; i.e. All Sales Reps, or
- Select a specific item in the category; i.e. a specific Sales Rep

For the Bookings, Shipments and Invoice reports, the data can be further selected as:

- Month To Date, or
- Year To Date

Sample Pages

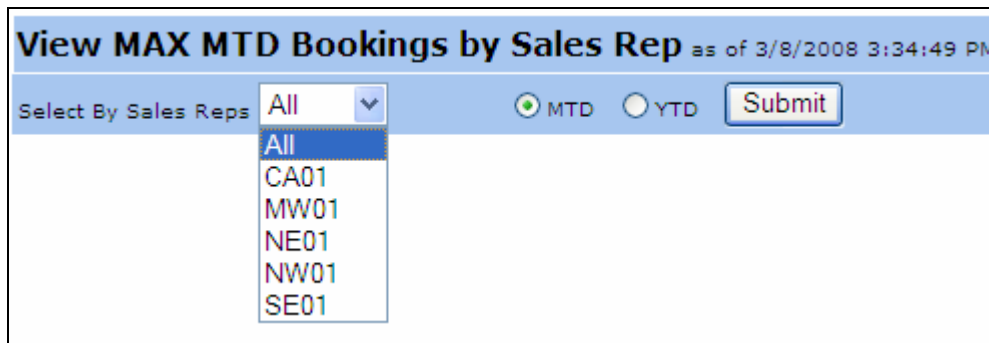
The e-Synergy MAX Sales Reporting Pages “start page” is displayed below:

MAX Sales Reporting Start Page			
Bookings	Backlog	Shipments	Invoices
By Sales Rep	By Sales Rep	By Sales Rep	By Sales Rep
By Territory	By Territory	By Territory	By Territory
By Product Line	By Product Line	By Product Line	By Product Line
By Customer	By Customer	By Customer	By Customer

After selecting a link, such as Booking By Sales Rep, a page is presented to select the Sales Rep and the MTD or YTD options as shown below:



The data in the drop-down list boxes is dynamically pulled from the appropriate MAX tables; such as the list of Sales Reps as shown below:



After selecting the options and clicking SUBMIT, the detail page of with the resulting detail data is displayed.

The following is an example showing all bookings YTD for all sales reps.

MAX Bookings YTD for All Sales Reps as of 3/16/2008 4:40:10 PM											
Cust ID	Customer	Order Num	Qty	Part ID	Description	Order Date	Prod	Ship Date	Sls Rep	Territory	Value
400	Chicago Distribution	20000008-01	15	11000	PowerServe 2299	11/17/07	MACH		CA01	West	\$14,925.00
300	Saturn Automotive	20000015-01	2	11000	PowerServe 2299	04/12/07	MACH	04/12/07	MW01	Midwest	\$2,398.00
200	Medtronic Corporation	20000005-01	3	11000	PowerServe 2299	03/11/08	MACH	09/21/07	NE01	Midwest	\$2,967.30
200	Medtronic Corporation	20000011-01	1	13800	Printed Circuit Board	12/21/07			NE01	Midwest	\$1,057.00
100	Intel Corporation	20000006-01	1	11000	PowerServe 2299	09/14/07	MACH	09/14/07	NW01	East	\$1,099.00
100	Intel Corporation	20000007-01	1	13800	Printed Circuit Board	07/14/07		09/14/07	NW01	East	\$555.00
100	Intel Corporation	20000010-01	1	11000	PowerServe 2299	07/21/07	MACH		NW01	East	\$1,099.00
100	Intel Corporation	20000012-01	3	11050	Spec 4A-677LZ	03/21/08	PROT	09/21/07	NW01	East	\$4,797.00
100	Intel Corporation	20000013-01	1	11000	PowerServe 2299	09/21/07	MACH	04/12/07	NW01	East	\$1,099.00
100	Intel Corporation	20000013-02	3	11050	Spec 4A-677LZ	09/21/07	PROT	04/12/07	NW01	East	\$4,797.00
100	Intel Corporation	20000014-01	1	11111	Model 1000 Presto!	09/21/07	MAC	09/21/07	NW01	East	\$694.00
100	Intel Corporation	20000016-01	2	11111	Model 1000 Presto!	03/04/08	MAC		NW01	East	\$1,413.20
100	Intel Corporation	20000017-01	1	13800	Printed Circuit Board	05/04/07		05/04/07	NW01	East	\$333.00
Totals... [Count = 13]											
Totals Credits... [Count = 1]											

The following is an example showing the bookings YTD for one sales rep.

MAX Bookings YTD by Sales Rep as of 3/16/2008 4:41:54 PM											
Cust ID	Customer	Order Num	Qty	Part ID	Description	Order Date	Prod	Ship Date	Sls Rep	Territory	Value
100	Intel Corporation	20000006-01	1	11000	PowerServe 2299	09/14/07	MACH	09/14/07	NW01	East	\$1,099.00
100	Intel Corporation	20000007-01	1	13800	Printed Circuit Board	07/14/07		09/14/07	NW01	East	\$555.00
100	Intel Corporation	20000010-01	1	11000	PowerServe 2299	07/21/07	MACH		NW01	East	\$1,099.00
100	Intel Corporation	20000012-01	3	11050	Spec 4A-677LZ	03/21/08	PROT	09/21/07	NW01	East	\$4,797.00
100	Intel Corporation	20000013-01	1	11000	PowerServe 2299	09/21/07	MACH	04/12/07	NW01	East	\$1,099.00
100	Intel Corporation	20000013-02	3	11050	Spec 4A-677LZ	09/21/07	PROT	04/12/07	NW01	East	\$4,797.00
100	Intel Corporation	20000014-01	1	11111	Model 1000 Presto!	09/21/07	MAC	09/21/07	NW01	East	\$694.00
100	Intel Corporation	20000016-01	2	11111	Model 1000 Presto!	03/04/08	MAC		NW01	East	\$1,413.20
100	Intel Corporation	20000017-01	1	13800	Printed Circuit Board	05/04/07		05/04/07	NW01	East	\$333.00
Totals... [Count = 9]											
Totals Credits... [Count =]											
\$15,886.20											
\$0.00											

The following is an example showing the bookings MTD for a specific Product Line.

MAX Bookings MTD by Product Line MACH as of 3/16/2008 4:42:35 PM											
Cust ID	Customer	Order Num	Qty	Part ID	Description	Order Date	Prod	Ship Date	Sls Rep	Territory	Value
200	Medtronic Corporation	20000005-01	3	11000	PowerServe 2299	03/11/08	MACH	09/21/07	NE01	Midwest	\$2,967.30
Totals... [Count = 1]											
Totals Credits... [Count =]											
\$2,967.30											
\$0.00											

The Backlog, Shipments and Invoice pages are similar in function and layout.

For example, Backlog for All Territories looks like this:

MAX Backlog for All Territories as of 3/16/2008 4:43:33 PM											
Cust ID	Customer	Order Num	Qty	Part ID	Description	Order Date	Prod	Ship Date	Sls Rep	Territory	Value
100	Intel Corporation	20000010-01	1	11000	PowerServe 2299	07/21/07	MACH		NW01	East	\$1,099.00
100	Intel Corporation	20000012-01	3	11050	Spec 4A-677LZ	03/21/08	PROT	09/21/07	NW01	East	\$1,599.00
100	Intel Corporation	20000016-01	2	11111	Model 1000 Presto!	03/04/08	MAC		NW01	East	\$1,413.20
200	Medtronic Corporation	20000011-01	1	13800	Printed Circuit Board	12/21/07			NE01	Midwest	\$1,057.00
300	Saturn Automotive	20000015-01	2	11000	PowerServe 2299	04/12/07	MACH	04/12/07	MW01	Midwest	\$1,199.00
400	Chicago Distribution	20000008-01	15	11000	PowerServe 2299	11/17/07	MACH		CA01	West	\$14,925.00
Totals... [Count = 6]											
Totals Credits... [Count = 1]											
\$18894.2											
\$1,199.00											

The shipments are based on the Transaction History and can be view for MTD and YTD data like the following for Customer ID 200:

YTD MAX Shipments for Customer 200 as of 3/16/2008 4:44:51 PM											
Cust ID	Customer	Order Num	Qty	Part ID	Description	Order Date	Prod	Ship Date	Sls Rep	Territory	Value
200	Medtronic Corporation	20000005-01	1	11000	PowerServe 2299	03/11/08	MACH	09/21/07	NE01	Midwest	\$989.10
200	Medtronic Corporation	20000005-01	1	11000	PowerServe 2299	03/11/08	MACH	01/21/08	NE01	Midwest	\$989.10
200	Medtronic Corporation	20000005-01	1	11000	PowerServe 2299	03/11/08	MACH	01/25/08	NE01	Midwest	\$989.10
Totals... [Count = 3]											
Totals Credits... [Count =]											
\$2,967.30											
\$0.00											

Invoice history can be generated in the same fashion. Here is an example of

MAX Invoices YTD by Product Line MACH as of 3/16/2008 4:50:36 PM											
Cust ID	Customer	Inv Num	Qty	Part ID	Description	Order Date	Prod	Inv Date	Sls Rep	Territory	Value
100	Intel Corporation	000001	1	11000	PowerServe 2299	09/14/07	MACH	09/14/07	NW01	East	\$1,099.00
100	Intel Corporation	00000009	1	11000	PowerServe 2299	09/21/07	MACH	04/12/07	NW01	East	\$1,099.00
200	Medtronic Corporation	00000008	1	11000	PowerServe 2299	03/11/08	MACH	04/11/07	NE01	Midwest	\$989.10
200	Medtronic Corporation	000003	1	11000	PowerServe 2299	03/11/08	MACH	09/21/07	NE01	Midwest	\$989.10
200	Medtronic Corporation	000004	1	11000	PowerServe 2299	03/11/08	MACH	01/21/08	NE01	Midwest	\$989.10
300	Saturn Automotive	00000002	1	11000	PowerServe 2299	04/12/07	MACH	04/12/07	MW01	Midwest	\$1,199.00
Totals... [Count = 6]											\$3,966.30
Totals Credits... [Count = 1]											\$1,199.00

Database Access and Configuration

There are four underlying data views used to generate the data that are included with the application and can be added to the MAX database.

Access to the MAX and e-Synergy data is configured in an ASP "include" file that hides the data from anyone viewing the page source code. It is simple task to configure and connect to the MAX and e-Synergy database in each customer installation.

The ASP "include" file also contains the code to manage the Fiscal Year start date for the Year To Date calculations.

The Sales Rep field uses the REP1_27 from the Sales Order Master table with a link to the Sales Rep Master table.

The Sales Territory is based on the Territory field in the Sales Rep Master table associated with the REP1_27 from the Sales Order Master table.

The Product Line is based on the Product Line field in the Part Sales table associated with the Part ID in the Sales Order Detail table.

Shipment detail is based on the MAX Transaction History shipment transactions.

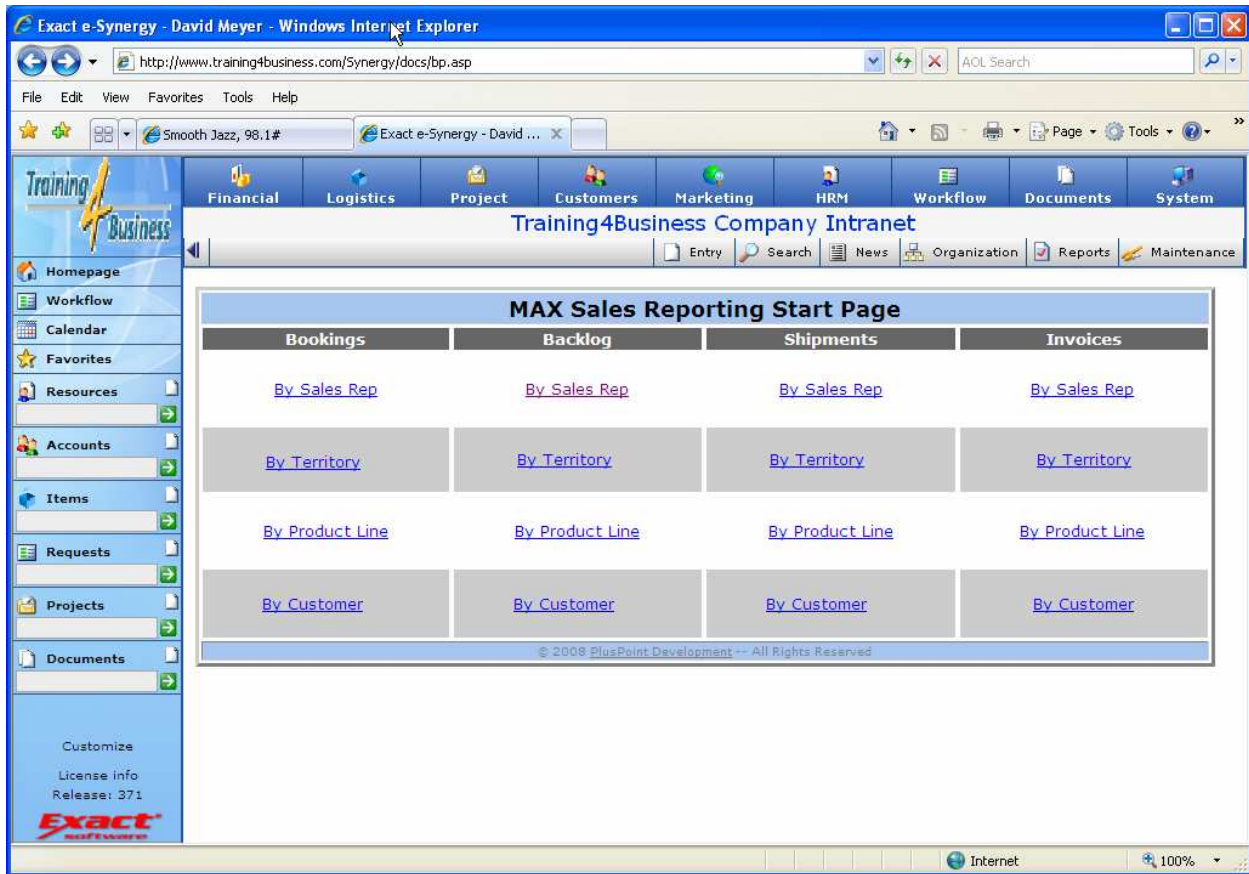
The data access and the pages are "view only" and no updates to the underlying data occur. The pages do not require the e-Synergy SDK.

The pages are designed for a minimum screen resolution of 1024 x 768 and display in this resolution or any higher resolution. Resolutions below 1024 x 768 will not yield acceptable results.

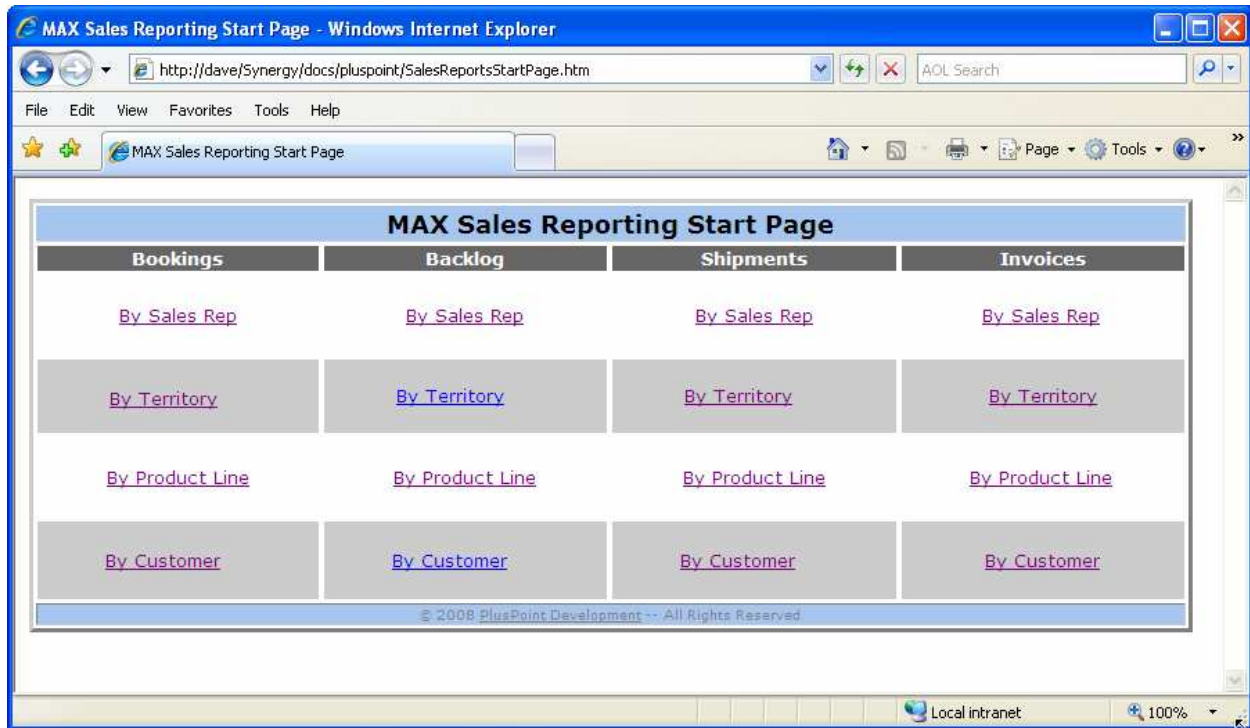
The pages work inside e-Synergy using the MAX Sales Reporting Start Page which is included with the pages. These pages can also be installed on an internal or external website outside of e-Synergy.

Installation Options:

The MAX Sales Reporting Pages will run inside e-Synergy as shown below:



Or they can also be configured to run as a stand-alone set of web pages for internal or external access as show below:



In the later case, access rights and security must be handled through Internet Information Services (IIS) as rights are handled externally from the MAX Sales Reporting Pages.

Installation and Customization

The installation and configuration of the MAX Sales Reporting pages is done over the internet by directly access to the customer's server for the database, MAX application and e-Synergy application with Remote Desktop Connection or similar application.

Installation and configuration of the standard pages is included with the purchase of MAX Sales Reporting.

The pages can be customized for specific requirements using e-Synergy Consulting services.

Pricing:

The MAX Sales Reporting Pages is sold as a block of 12 consulting hours at the current standard e-Synergy Consulting Rates with no discounts. Additional hours are required for any customizations for unique requirements which will be quoted on request.