ACTIVANT®

Eclipse Information System

Release 8.6.2 (Eterm)

Legal Notices

Activant® Eclipse™ 8.6.2 Online Help System

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Eclipse Information System Overview

The Eclipse Information System (EIS) is a fully integrated, online analytical processing (OLAP) companion product that gives you a real-time, graphical representation of your sales and purchasing business data. You get instant access to multi-dimensional data that lets you quickly identify valuable business trends. You can examine your business data from a "Top-10" summary perspective, or drill down to the transaction level and analyze your data in greater detail.

Each evening the sales and purchasing data is collected in EIS. This data is then available for you to evaluate and graph, to share or distribute, as needed. You can run extensive searches on data without sending requests to dynamic information, thereby speeding up the search process. In addition, when the build runs each evening, the data is added to the current information so that the information is comprehensive and not just a snapshot of a day.

Features and Benefits

You can analyze your sales and purchasing data.

- Graph business data for customers, vendors, price lines, buy lines and more for any range of dates.
- Drill down from summary-level data to item-level detail in seconds.
- Compare one period against another period, side-by-side in graphical format.
- Analyze both favorable and unfavorable trends in your business by viewing the extremes from a top-down or bottom-up perspective.
- View your business data in different graphical formats, such as line charts, bar charts, and pie charts.
- Quickly switch back and forth between graphs and charts, and the EIS report builder.

You can also investigate your business data from different perspectives using a variety of inquiries. For more information, see the Management Inquiries Overview.

See Also:

Setup Requirements for the Eclipse Information System

Setup Requirements for the Eclipse Information System

Following are the setup requirements for the Eclipse Information System. No control maintenance records or authorization keys exist for this product.

User Maintenance

Identify the EIS groups for which each user is authorized to generate graphs.

Management Inquiries

If you plan to analyze sales statistics using various categories, ensure that those categories are assigned to your customers and products, or are being used during sales order entry.

Customer Maintenance

Assign the following to each of your customers, as needed:

- Customer type

  Customer types are defined in the Valid Customer Types control maintenance record.

- Customer select code

  Customer select codes are defined in the Valid Customer Select Codes control maintenance record.

G/L Sales Source Maintenance

Define your sales sources in the system.

Terminal Setup

Assign a sales source to each of your terminals, as needed.

Note: If a terminal does not have a sales source assigned, the sales representative will select from a list of sales sources during sales order entry.

Ship Via Maintenance

Define your methods of transportation in the system.

Note: Ship vias are assigned during sales order entry.

Price Maintenance

Assign the following to pricing matrix cells, as needed:

- Sell groups

  Sell groups are defined in the Buy/Sell Group Maintenance window.

- Buy groups

  Buy groups are defined in the Buy/Sell Group Maintenance window.

Product Maintenance

Assign the following to each of your products, as needed:

- Price line

  Price lines are defined in the Price Line Maintenance window.

- Buy line

  Buy lines are defined in the Buy Line Maintenance window.

- G/L product type

  G/L product types are defined in the G/L Product Type Maintenance window.

- Product select code

  Product select codes are defined in the Valid Product Select Codes control maintenance record.

- Product status

  Product statuses are system-defined and cannot be added or changed.

- Commodity code

  Commodity codes are defined in the Valid Product Commodity Codes control maintenance record.

- Budget group

  Budget groups are defined in the Sales Budget Group Maintenance window.

EIS Build Sales/Purchases

Build the EIS sales/purchases datafile.

Important: Never use the phantom scheduler to schedule the initial build, and do not build it during business hours or during system backup.

Phantom Scheduler

You may want to schedule the EIS Incremental Sales/Purchases process to run daily.

See Also:

Creating EIS Graphs

Graphing Overview

Building the EIS Sales/Purchases Datafile

The EIS Sales Datafile Build driver is a reporting tool that builds a cross-indexed file, based on the type of information you want to graph. The file that is built is independent of the system database. You must specify the hours when it is safe to run the build, because the build is processor-intensive and can affect system performance if too many other programs are running. For this reason, we recommend running the build during off-hours, such as nights or weekends. Keep in mind that if you change information in your database, you must run the datafile build again before you create new graphs.

To build the sales and purchases datafile:

1. From the **Reprts > Eclipse Information System (EIS) > EIS Maintenance > EIS Sales/Purchases** menu, select **EIS Build/Sales Purchases** to display the EIS Sales Datafile Build screen.

   The system populates the **Build Status** field with the status of the EIS datafile build and the **Build Mode** field with the mode in which your build will begin.

2. For each day on which the EIS datafile will be built, enter the following information:

Column	Description
Morning Stop	The time to stop building the EIS datafile.
Evening Start	The time to begin building the EIS datafile.

3. Do one of the following:

To...	Use this hot key...
begin building the EIS datafile at the time specified in the **Evening Start** field for today's day of the week.	**Begin** **Important:** Use this method when performing the initial build.
schedule the EIS datafile build to begin on a different day of the week	**Schedule** The Phantom Scheduler screen displays.

4. Press **F12** to exit the screen.

Updating EIS Sales and Purchasing Transactions

This function runs nightly during the scheduled hours for the datafile build. When finished, it has gathered all the information up to the previous day's business. We recommend that you run this program daily.

To update EIS sales transactions:

1. From the **Reprts > Eclipse Information System (EIS) > EIS Sales/Purchases** menu, select **EIS Incremental Sales/Purchases** to display the Update EIS Sales Transactions screen.
2. Do one of the following:

To...	Use this hot key...
begin building the EIS datafile now	**Begin Now**
schedule the EIS datafile build to begin at a future date or time	**Schedule** The Phantom Scheduler screen displays.

The system exits the screen.

Stopping the EIS Sales/Purchases Build

This function allows you to make a clean exit from the datafile build. Use it before you reboot your system.

To stop an EIS sales/purchases build:

1. From the **Reprts > Eclipse Information System (EIS) > EIS Sales/Purchases** menu, select **Stop EIS Sales Build** to display the Stop EIS Sales Build screen.
2. Use the **Proceed** hot key to stop the sales build.
3. At the **EIS Sales build set to stop the next time it starts** message, press **Enter** to exit the screen.

See Also:

Restarting a Stopped EIS Sales/Purchases Build

Restarting a Stopped EIS Sales/Purchases Build

This function allows you to restart a datafile build that was stopped in error.

To restart a stopped sales/purchases build:

1. From the **Reprts > Eclipse Information System (EIS) > EIS Sales/Purchases** menu, select **Stop EIS Sales Build** to display the Stop EIS Sales Build screen.
2. Use the **Cancel** hot key to cancel the stop build request.
3. At the **Request to stop EIS Sales build has been cancelled** message, press **Enter** to exit the screen.

See Also:

Stopping the EIS Sales/Purchases Build

Creating EIS Graphs

After you set up your system to work with graphs, use the Eclipse Information System screen to select the type of information you want to your graphs to display and to choose the format for your graphs. The graphs are created using the EGraph application.

A number of customer, pricing, and product categories must be in use to optimize the functionality available in this program and the related management inquiries. See Setup Requirements for the Eclipse Information System.

To create an EIS graph:

1. From the **Reprts > Eclipse Information System (EIS)** menu, select **Eclipse Information System** to display the Eclipse Information System screen.
2. In the **Br/Tr/ALL** field, enter the branches or territories for which to select data. Enter commas between codes. To select data for all branches, enter **ALL**.
3. Change the information in any of the following fields, as needed:

To change the value in this field...	Use this hot key...
Br/Tr/ALL	**Branch** The cursor moves to the **Br/Tr/ALL** field. Type the new branch or territory codes and press **Enter** to update.
As of Date	**Date** The cursor moves to the **As of Date** field. Type the date as of which to graph sales or purchasing data and press **Enter** to update.
Detail	**Detail** The cursor moves to the **Detail** field. Type the size of the data sample to include on the graph and press **Enter** to update. The default is **10**. For example, if you want to view data for the top five bill-to customers only, enter **5**. If you select a bar graph, five bars will display on the graph. If it is a comparison graph, ten bars will display on the graph, grouped in twos, each bar representing the specified periods to compare.

To change the value in this field...	Use this hot key...
Transactions	**Trans** The Transactions selection list displays. Select one of the following values to determine the type of sales data to display on the graph: • **Net Stock&Direct** – Shows sales after taxes for all stock and direct orders. • **All** – Shows stock and direct sales before taxes, less any item returns. **Note:** Because miscellaneous charge items have no cost associated with them, they tend to artificially distort the profit margin upward. For this reason, they are excluded from the calculations. • **Stock&Direct Sales** – Shows sales before taxes for all stock and direct orders. • **Stock Sales** – Shows sales before taxes for orders shipped from your inventory to the customer. • **Direct Sales** – Shows sales before taxes for orders shipped from the vendor's inventory to the customer. • **Misc Sales** – Shows sales before taxes for miscellaneous charges such as restocking fees or labor charges. • **Stock&Direct Returns** – Shows negative dollar amounts for returned stock and direct items. • **Stock Returns** – Shows negative dollar amounts for items returned by the customer to your inventory. • **Direct Returns** – Shows negative dollar amounts for items returned by the customer to the vendor's inventory. • **Misc Returns** – Shows negative dollar amounts for miscellaneous charges credited to the customer. • **Net Stock** – Shows sales after taxes for orders shipped from your inventory to the customer. • **Net Direct** – Shows sales after taxes for orders shipped from the vendor's inventory to the customer. • **Net Misc** – Shows sales after taxes for miscellaneous charges such as restocking fees or labor charges.
Sortby	**Sortby** The Sortby selection list displays. To show the highest dollar values first, select **Descending**; otherwise, select **Ascending**.

To change the value in this field...	Use this hot key...
Period	**Period** The Period selection list displays. Select one of the following values to determine what type of period detail to display on the graph: • **Last 12 Months** – Shows data for the twelve months preceding the date you entered in the **As Of Date** field in the **Solar EIS** window. • **Year To Date** – Shows data for the months from the beginning of the current calendar year through the date you entered in the **As Of Date** field. • **Last12-Prior12 Months** – Shows data for the twelve months preceding the date you entered in the **As Of Date** field in the **Solar EIS** window and the twelve months before that. • **This Year-Last Year** – Shows a side-by side sales comparison of sales or purchases made as of the date you entered in the **As Of Date** field in the **Solar EIS** window and the same date a year before that, shown with this year's data displaying first. • **Last Year-This Year** – Shows a side-by side sales comparison of sales or purchases made as of the date you entered in the **As Of Date** field in the **Solar EIS** window and the same date a year before that, shown with the previous year's data displaying first. • **Last 4 Quarters** – Shows data for the four quarters preceding the date you entered in the **As Of Date** field in the **Solar EIS** window. • **Fiscal Month** – Shows data for the month specified in the **As Of Date** field. • **This Month-Last Month** – Shows a side-by-side comparison of sales or purchases made this month and last month. • **This Month-Same Month** – Shows a side-by-side comparison of sales or purchases made this month and the same month last year.
Graph Data	**Graph Data** The EIS Sales Graph Data screen displays.

4. In the **Graph Groups** area, click one of the following to determine which type of statistics to graph:
   - **Sales**
   - Purchases
5. If you selected **Sales**, to add or change the value in the **Graph Data** field, click it or use the **Graph Data** hot key to display the EIS Sales Graph Data screen. Select the sales, cost, and gross profit data to display on the graph.

   Note: If you selected **Purchases**, the only valid value is **Purchases $**.

6. Do one of the following:

If you selected...	Do this...
Sales	Click one of the following values: • **All Sales** – Shows all sales for the selected period as of the selected date. • **Parent Customer** – Shows sales from any customer that either has multiple billing and shipment addresses or that receives all bills and shipments at the same location. • **Billto Customer** – Shows sales from any customer that remits payment for multiple shipment addresses. • **Shipto Customer** – Shows sales for shipment addresses. • **Customer Type** – Shows sales according to the customers' type of business, such as plumbing or electrical. • **Customer Select Code** – Shows sales according to the customers' industry segment. • **Inside Salesperson** – Shows sales credited to the sales representative responsible for generating subsequent sales for the customer. • **Outside Salesperson** – Shows sales credited to the sales representative responsible for acquiring new customers. • **Writer** – Shows sales generated by the employee who wrote the sales orders. • **Sales Source** – Shows sales by the location or origination point of the sale, for example, inside sales, counter sales, or showroom sales. • **Ship Via** – Shows sales based on the method used to transport the items to the customer.
Purchases	Click one of the following values: • **All Purchases** – Shows all purchases for the selected period as of the selected date. • **Payto Vendor** – Shows purchases from any vendor to whom you remit payments for purchases made from multiple shipment addresses. • **Shipfrom Vendor** – Shows purchases from vendor shipment addresses. • **Vendor Type** – Shows purchases according to the vendors' type of business, such as plumbing or electrical. • **Writer** – Shows purchases based on the employee who wrote the purchase order. • **Ship Via** – Shows purchases based on the method used to transport the items from the vendor. • **Buy Line** – Shows purchases based on the buy line of the products. • **Buy Group** – Shows purchases based on the costing rules for the products. • **Price Line** – Shows purchases based on the price line of the products. • **Sell Group** – Shows purchases based on the pricing rules set for the products. • **GL Type** – Shows purchases based on the product category, such as electrical or plumbing.

The system launches the EGraph application and displays the requested data.

7. When you have finished creating graphs, press **Esc** to exit the screen.

Selecting EIS Graph Revenue and Cost Options

Before you create a graph, you may want to select a specific type of revenue or cost to display in it. Use the EIS Sales Graph Data screen to select the type of dollar amounts or percentages for which to view graph data.

To select EIS graph revenue and cost options:

1. From the **Reprts > Eclipse Information System** menu, select **Eclipse Information System** to display the **Solar EIS** screen.
2. Select the initial graph parameters.
3. Use the **Graph Data** hot key to display the EIS Sales Graph Data screen.
4. Do any of the following, as needed:

To...	Do this...
clear the values from the **Graph Data** area	Use the **Clear** hot key.
add revenue or cost types to the **Graph Data** area	Use any of the following hot keys: • **Sales $** – Shows the dollar amount of the sales generated. • **COGS $** – Shows the cost of goods sold. • **COGS GP$** – Shows the amount of profit your company receives, based on the cost of goods sold. • **COGS GP%** – Shows the percentage of the sales dollars generated that your company has received as profit, based on the cost of goods sold. • **Comm $** – Shows the dollar amount of the cost used to calculate commissions. • **Comm GP$** – Shows the amount of profit your company receives, based on the commission cost. • **Comm GP%** – Shows the percentage of the sales dollars generated that your company has received as profit, based on the commission cost.
clear a specific revenue or cost type from the **Graph Data** area	Use the hot key that corresponds to the type of revenue or cost. For example, to remove the cost of goods sold dollar amount value, use the **COGS $** hot key.
save the selected values	Use the **Save** hot key or press **Esc**. The system returns you to the Eclipse Information System screen and populates the **Graph Data** field with your selections.

Management Inquiries Overview

Use EIS management inquiries to view high-level management information and track critical distribution data. In addition, you can monitor sales trends month over month, quarter over quarter, and year over year so that you can better forecast your inventory levels. These inquiries provide a real-time snapshot of your business without you having to build and compile individual reports.

The following inquiries are available:

- Monthly Sales Inquiry
- Monthly Sales Type Inquiry
- Branch Manager Sales Inquiry
- Salesperson Sales Inquiry
- Sales Category Inquiry
- Price Line Sales Inquiry
- Customer/Price Line Inquiry

Viewing Summarized Financial Information

To view summarized financial information for one or more branches or territories within your company, run the Branch Summary Inquiry. You can review your total sales, accounts receivable, accounts payable, purchases, and inventory as of a specific date. This inquiry gives you the total picture of how your business is doing.

To view only sales information, run the Branch Sales Inquiry. This inquiry compiles more quickly because it does not include accounting or inventory statistics.

To view a summary of a branch's financial information:

1. From the **Reprts > Management Inquiries** menu, select **Branch Summary Inquiry** to display the Branch Summary Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view financial information. Enter commas between codes. To view financial information for all branches, enter **ALL**.
3. In the **Bookings** field, enter one of the following values:
   - **Original** – Shows the totals for all sales orders written during the specified period. This includes orders that were bids only.

     Note: This total may also include amounts entered in error. For example, if the sales representative entered a price of $10000, but meant to enter $100.00, the $10,000 amount is reflected in the original booking total, even if the sales representative later corrects the total to be $100.00.
   - **Net** – Shows the totals for all sales orders written during the specified period, including any adjustments made to those orders since they were first written.
4. In the **As of Date** field, enter the date as of which to view financial information.
5. With the cursor in the **As of Date** field, press **Enter** to display financial information based on your selection criteria.

   Note: You can view the progress of the data compilation on the status bar. Compiling may take a few minutes.

6. Review the following information for each order type:

Column	Description
Order Type	The types of orders for which to view dollar amounts and gross profit: • **Warehouse** – Shows the totals for orders shipped from the selected branch's warehouse. • **Credits** – Shows the totals for credits issued against orders shipped from the selected branch's warehouse. • **Directs** – Shows the totals for orders written at the selected branch but shipped from a vendor's warehouse. • **Dir Credit** – Shows the totals for credits issued against orders written at the selected branch but shipped from a vendor's warehouse. • **TOTAL** – The total amounts for all categories by column.
MTD Booked$	The total dollar amount of all sales orders written during the specified period. This shows all items ever entered on an order even if the price was changed or the order was canceled.
GP %	The percentage of the total dollar amount the selected branch would receive as gross profit during the specified period if all written sales orders were invoiced.
Sales $	The total dollar amount of all sales orders actually invoiced or shipped during the specified period.
GP $	The total dollar amount the selected branch receives as profit from all sales orders actually invoiced or shipped during the specified period.
GP %	The percentage of the total dollar amount the selected branch receives as gross profit during the specified period for all sales orders invoiced or shipped during the specified period.
Open $	The total dollar amount of all open sales orders, not only those that have not been shipped as of the specified date.
GP %	The percentage of the total dollar amount the selected branch would receive as gross profit during the specified period if all open sales orders were invoiced.

7. In the **Accounts Receivable** area, review the following information, as needed:

Field	Description
Open	The total dollar amount of all invoiced sales orders.
Cash Receipts	The total dollar amount of all payments received.
Inv to print	The total dollar amount of sales orders that have not been billed to the customer.

8. In the **Accounts Payable** area, review the following information, as needed:

Field	Description
Open	The total dollar amount of invoices that have not yet been paid.
Unbilled	The total dollar amount owed to vendors for purchases the branch has made for which you have not yet been billed.

Field	Description
TOTAL	The total dollar amount of all accounts payable, including both open and unbilled payables.

9. In the **Open Purchases** area, review the following information, as needed:

Field	Description
Whse	The total dollar amount owed to vendors for orders received at the selected branch's warehouse.
Dir	The total dollar amount owed to vendors for orders written at the selected branch but shipped from a vendor's warehouse.
Ret	The total dollar amount of purchases made at the selected branch that were returned to the vendor for credit.
TOT	The total dollar amount of open warehouse and direct shipment purchases, minus returns.

10. In the **Inventory Valuation** area, review the following information, as needed:

Field	Description
G/L	The general ledger balance for the selected branch's inventory.
Avg	The total value of all items in the selected branch's inventory, based on the average cost paid for each item.
Dflt	The value of all items in the branch's inventory, based on replacement cost.
Last	The value of the selected branch's inventory, based on the last price paid for the items.
COGS	The dollar amount of your cost of goods sold.

11. When you have finished reviewing information, press **Esc** to exit the screen.

See Also:

Management Inquiries Overview

Viewing Branch Sales Information

To view sales information for one or more branch locations, run the Branch Sales Inquiry. You can view the totals for all sales orders written, invoiced, or open, and compare sales between branches.

To view sales information by branch:

1. From the **Reprts > Management Inquiries** menu, select **Branch Sales Inquiry** to display the Branch Sales Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view sales information. Enter commas between codes. To view sales information for all branches, enter **ALL**.
3. In the **Month** field, enter the first three letters of the month for which to view sales information.
4. In the **Year** field, enter the year for which to view sales information.
5. With the cursor in the **Year** field, press **Enter** to display sales information based on your selection criteria.
6. Review the following information for each branch, as needed:

Column	Description
Branch	The name of the pricing branch for which to view sales data.
Booked $	The total dollar amount of all sales orders written, including any adjustments made to those orders since they were first written.
<Booked>GP %	The percentage of the total dollar amount the branch would receive as gross profit if all written sales orders were invoiced.
Sales $	The total dollar amount of all sales orders invoiced or shipped.
<Sales> GP $	The total dollar amount the selected branch receives as profit from all sales orders actually invoiced or shipped.
<Sales> GP %	The percentage of the total dollar amount the selected branch receives as gross profit for all sales orders actually invoiced or shipped.
Open $	The total dollar amount of all open sales orders, not only those that have not been shipped.
<Open> GP %	The percentage of the total dollar amount the selected branch would receive as gross profit if all open sales orders were invoiced.

7. When you have finished reviewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Branch Sales Inquiry window also offers these options:

To...	Select this menu option...
view a graphical representation of the data on the table	**File > Create Graph** The Graph Options for Branch Sales Inquiry dialog box displays.
export the data to an Excel spreadsheet	**File > Save as Excel** The Save dialog box displays.
print the table	**File > Print Table** The Print Table dialog box displays.

See Also:

Management Inquiries Overview

Viewing Summarized Financial Information

Comparing Yearly Sales by Month

To compare this year's sales and gross profit to last year's sales and gross profit on a month-by-month basis, run the Monthly Sales Inquiry. This inquiry also shows you the percentage of increase or decrease in sales year over year.

To compare yearly sales by month:

1. From the **Reprts > Management Inquiries** menu, select **Monthly Sales Inquiry** to display the Monthly Sales Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view sales and gross profit data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Date** field, enter the date as of which to view the sales data. The default is today's date.
4. In the **Sales Type** field, enter one of the following values to determine the type of sales data to view:
   - **Net Stock&Direct** – Shows sales and profit after taxes for all stock and direct orders.
   - **All** – Shows stock and direct sales and profit before taxes, less any item returns.

   Note: Because miscellaneous charge items have no cost associated with them, they tend to artificially distort the profit margin upward. For this reason, they are excluded from the calculations.

   - **Stock&Direct Sales** – Shows sales and profit before taxes for all stock and direct orders.
   - **Stock Sales** – Shows sales and profit before taxes for orders shipped from your inventory to the customer.
   - **Direct Sales** – Shows sales and profit before taxes for orders shipped from the vendor's inventory to the customer.
   - **Misc Sales** – Shows sales and profit before taxes for miscellaneous charges such as restocking fees or labor charges.
   - **Stock&Direct Returns** – Shows negative dollar amounts for returned stock and direct items.
   - **Stock Returns** – Shows negative dollar amounts for items returned by the customer to your inventory.
   - **Direct Returns** – Shows negative dollar amounts for items returned by the customer to the vendor's inventory.
   - **Misc Returns** – Shows negative dollar amounts for miscellaneous charges credited to the customer.

- **Net Stock** – Shows sales and profit after taxes for orders shipped from your inventory to the customer.
- **Net Direct** – Shows sales and profit after taxes for orders shipped from the vendor's inventory to the customer.
- **Net Misc** – Shows sales and profit after taxes for miscellaneous charges such as restocking fees or labor charges.

5. In the **Period** field, enter one of the following values:
   - **Last 13** – Shows sales data for the thirteen months preceding the date you entered in the **Date** field.
   - **Last 12** – Shows sales data for the twelve months preceding the date you entered in the **Date** field.
   - **Fiscal YTD** – Shows sales data for the months from the beginning of the current fiscal year through the date you entered in the **Date** field.
6. With the cursor in the **Period** field, press **Enter** to display sales and gross profit data based on your selection criteria.
7. Review the following information for each month, as needed:

Column	Description
Month	The month and year for which to view sales data. For example, **OCT 06** indicates that you are viewing data for the month of October in the year 2006.
Sales	The total net or gross sales generated during the selected month, or the total dollar amount for returned goods.
GP	The amount of gross or net profit received for sales generated during the selected month, or the amount of profit lost from returned goods.
GP%	The percentage of the sales your company receives as gross or net profit, or the percentage lost from returned goods.
Prior Sales	The gross or net sales generated during the selected month in the prior year.
Prior GP	The amount of gross or net profit received during the selected month in the prior year.
P GP%	The percentage of the sales generated during the selected month in the prior year that the company received as gross or net profit.
% Chng	The percentage sales increased or decreased from the previous year to the current year for the selected month.

8. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Monthly Sales Inquiry screen also offers these options:

To...	Use this hot key...
change the branch or territory code	**Branch** The cursor moves to the **Br/Tr/ALL** field. Type the new value and press **Enter** to update the screen.
change the date as of which to view the sales information	**Date** The cursor moves to the **Date** field. Type the new value and press **Enter** to update the screen.
change the sales type	**Sales Type** The **Sales Type** selection list displays. Select the new value and press **Enter** to update the screen.
change the period over which to view sales information	**Period** The **Period** selection list displays. Select the new value and press **Enter** to update the screen.

See Also:

Management Inquiries Overview

Comparing Stock and Direct Monthly Sales

Comparing Stock and Direct Monthly Sales

To compare monthly sales and profits for stock orders against direct shipment orders, run the Monthly Sales Type Inquiry. You can view statistics for sales, returns, or sales less returns as of a specific date. You can quickly compare month-to-month sales and monitor seasonal sales and different types of sales.

To compare monthly sales for stock orders against direct shipment orders:

1. From the **Reprts > Management Inquiries** menu, select **Monthly Sales Type Inquiry** to display the Monthly Sales Type Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view sales and gross profit data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Date** field, enter the date as of which to view the sales data. The default is today's date.
4. In the **Sales Type** field, enter one of the following values:
   - **All** – Shows data for sales less returns.
   - **Sales** – Shows data for sales only.
   - **Returns** – Shows data for returned goods only.
5. In the **Period** field, enter one of the following values:
   - **Last 13** – Shows sales data for the thirteen months preceding the date you entered in the **Date** field.
   - **Last 12** – Shows sales data for the twelve months preceding the date you entered in the **Date** field.
   - **Fiscal YTD** – Shows sales data for the months from the beginning of the current fiscal year through the date you entered in the **Date** field.
6. With the cursor in the **Period** field, press **Enter** to display sales and gross profit data for stock and direct orders based on your selection criteria.
7. For each month, review the following information:

Column	Description
Month	The name of the month in which the sales occurred.
Stock	The total sales for the selected month of items shipped from your inventory.
S GP%	The percentage of the total dollar amount the selected branch receives as gross profit for all stock sales orders invoiced or shipped.
% Sls	The percentage of the monthly sales received from stock sales orders.
Direct	The total sales for the selected month of items written at the selected branch but shipped from a vendor's warehouse.

Column	Description
D GP%	The percentage of the total dollar amount the selected branch receives as gross profit for all direct sales orders invoiced or shipped.
% Sls	The percentage of the monthly sales received from direct sales orders.

8. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Monthly Sales Type Inquiry screen also offers these options:

To...	Use this hot key...
change the branch or territory code	**Branch** The cursor moves to the **Br/Tr/ALL** field. Type the new value and press **Enter** to update the screen.
change the date as of which to view the sales information	**Date** The cursor moves to the **Date** field. Type the new value and press **Enter** to update the screen.
change the sales type	**Sales Type** The **Sales Type** selection list displays. Select the new value and press **Enter** to update the screen.
change the period over which to view sales information	**Period** The **Period** selection list displays. Select the new value and press **Enter** to update the screen.

See Also:

Management Inquiries Overview

Monthly Sales Inquiry

Viewing Monthly Sales Trends by Branch

To view the monthly sales for one or more branches over a specific period, run the Branch Manager Sales Inquiry. This inquiry shows the total sales for each month, along with the amount of profit received, both by dollar amount and percentage of sales. In addition, it shows how much of the total revenue for the period was earned during each month. This helps you to determine trends so that you can better plan to increase or decrease inventory levels to coincide with typical demand.

To view monthly sales for one or more branches:

1. From the **Reprts > Management Inquiries** menu, select **Branch Manager Sales Inquiry** to display the Branch Manager Sales Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view sales and gross profit data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Date** field, enter the date as of which to view the sales data. The default is today's date.
4. In the **Sales Type** field, enter one of the following values to determine the type of sales data to view:
   - **All** – Shows stock and direct sales and profit before taxes, less any item returns.

     Note: Because miscellaneous charge items have no cost associated with them, they tend to artificially distort the profit margin upward. For this reason, they are excluded from the calculations.

   - **Stock&Direct Sales** – Shows sales and profit before taxes for all stock and direct orders.
   - **Stock Sales** – Shows sales and profit before taxes for orders shipped from your inventory to the customer.
   - **Direct Sales** – Shows sales and profit before taxes for orders shipped from the vendor's inventory to the customer.
   - **Misc Sales** – Shows sales and profit before taxes for miscellaneous charges such as restocking fees or labor charges.
   - **Stock&Direct Returns** – Shows negative dollar amounts for returned stock and direct items.
   - **Stock Returns** – Shows negative dollar amounts for items returned by the customer to your inventory.
   - **Direct Returns** – Shows negative dollar amounts for items returned by the customer to the vendor's inventory.

- **Misc Returns** – Shows negative dollar amounts for miscellaneous charges credited to the customer.

5. In the **Period** field, enter one of the following values:
   - **Last 13** – Shows sales data for the thirteen months preceding the date you entered in the **Date** field.
   - **Last 12** – Shows sales data for the twelve months preceding the date you entered in the **Date** field.
   - **Fiscal YTD** – Shows sales data for the months from the beginning of the current fiscal year through the date you entered in the **Date** field.
6. With the cursor in the **Period** field, press **Enter** to display sales and gross profit data based on your selection criteria.
7. Review the following information for each month, as needed:

Column	Description
Month	The name of the month in which the sales occurred.
Sales	The dollar amount of the revenue received for products or services.
Gross Profit	The dollar amount of the revenue received as profit.
GP%	The percentage of the revenue your company received as profit.
% Total Sales	The percentage of the total revenue received that was received during the selected month.

8. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Branch Manager Sales Inquiry screen also offers these options:

To...	Use this hot key...
change the branch or territory code	**Branch** The cursor moves to the **Br/Tr/ALL** field. Type the new value and press **Enter** to update the screen.
change the date as of which to view the sales information	**Date** The cursor moves to the **Date** field. Type the new value and press **Enter** to update the screen.
change the sales type	**Sales Type** The **Sales Type** selection list displays. Select the new value and press **Enter** to update the screen.
change the period over which to view sales information	**Period** The **Period** selection list displays. Select the new value and press **Enter** to update the screen.

See Also:

Management Inquiries Overview

Viewing Sales by Sales Representative

To compare how your sales representatives are performing over a specified period, run the Salesperson Sales Inquiry. This inquiry shows the total sales dollars and gross profit percentages for each sales representative, and splits out the stock and direct ship sales so that you can see how the sales representatives are doing with each type.

To view sales for individual sales representatives:

1. From the **Reprts > Management Inquiries** menu, select **Salesperson Sales Inquiry** to display the Salesperson Sales Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view sales data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Date** field, enter the date as of which to view the sales data. The default is today's date.
4. In the **Sales Type** field, enter one of the following values:
   - **All** – Shows data for sales less returns.
   - **Sales** – Shows data for sales only.
   - **Returns** – Shows data for returned goods only.
5. In the **Period** field, enter one of the following values:
   - **Month** – Shows sales data for the month you entered in the **Date** field.
   - **Last 12** – Shows sales data for the twelve months preceding the date you entered in the **Date** field.
   - **Fiscal YTD** – Shows sales data for the months from the beginning of the current fiscal year through the date you entered in the **Date** field.
6. In the **Salesperson** field, enter one of the following values:
   - **Outside** – Shows sales data for the outside sales representatives.
   - **Inside** – Shows sales data for the inside sales representatives.
   - **Writer** – Shows the sales generated by the employee who wrote the sales orders.
7. In the **Sort** field, enter the column name by which to sort the information. Valid values include:
   - **Person** – Sorts alphabetically from A to Z by the sales representative's first name.
   - **Stock** – Sorts from highest dollar amount to lowest.
   - **Direct** – Sorts from highest dollar amount to lowest.
   - **Total** – Sorts from highest dollar amount to lowest.

8. With the cursor in the **Sort** field, press **Enter** to display sales and gross profit data for stock and direct orders based on your selection criteria.
9. For each sales representative, view the information in the following columns:

Column	Description
Salesperson	The name of the employee who receives a commission for the sale.
Stock	The dollar amount of items for which the sales representative receives a commission that shipped from the branch's warehouse.
S GP%	The percentage of the dollar amount your company receives as profit for goods shipped from the branch's warehouse.
Direct	The dollar amount of items for which the sales representative receives a commission that shipped from the vendor to your customer.
D GP%	The percentage of the dollar amount your company receives as profit for goods shipped from the vendor to your customer.
Total	The total dollar amount of stock and direct ship items for which the sales representative receives a commission.
T GP%	The percentage of the total dollar amount your company receives as profit for stock and direct ship items sold.

10. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Salesperson Sales Inquiry screen also offers these options:

To...	Use this hot key...
change the branch or territory code	**Branch** The cursor moves to the **Br/Tr/ALL** field. Type the new value and press **Enter** to update the screen.
change the date as of which to view the sales information	**Date** The cursor moves to the **Date** field. Type the new value and press **Enter** to update the screen.
change the sales type	**Sales Type** The **Sales Type** selection list displays. Select the new value and press **Enter** to update the screen.
change the period over which to view sales information	**Period** The **Period** selection list displays. Select the new value and press **Enter** to update the screen.
change the type of sales representative for which to review sales	**Salesperson** The **Salesperson** selection list displays. Select the new value and press **Enter** to update the screen.
change the primary column on which to sort the information	**Sort** The **Sort** selection list displays. Select the new value and press **Enter** to update the screen.

See Also:

Management Inquiries Overview

Sales Category Inquiry

Viewing Sales Information by Category

To view sales data by category types, run the Sales Category Inquiry. You can view sales in a number of different ways, such as customer type, by sales representative, or by a variety of different product selection methods. You can view revenue, costs, gross profit dollars, or gross profit percentages. In addition, you can compare any of these values between months, quarters, or years to help you analyze the growth or decline of various markets.

To view sales information for a specific category:

1. From the **Reprts > Management Inquiries** menu, select **Sales Category Inquiry** to display the Sales Category Inquiry screen.
2. In the **Br/Tr/ALL** field, enter the codes that identify the branches or territories for which to view sales and gross profit data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Date** field, enter the date as of which to view the sales data. The default is today's date.
4. In the **Category** field, enter one of the following values:
   - **Parent Customer** – Shows sales from any customer that either has multiple billing and shipment addresses or that receives all bills and shipments at the same location.
   - **Billto Customer** – Shows sales from any customer that remits payment for multiple shipment addresses.
   - **Shipto Customer** – Shows sales for shipment addresses.
   - **Customer Type** – Shows sales according to the customers' type of business, such as plumbing or electrical.
   - **Customer Select Code** – Shows sales according to the customers' industry segment.
   - **Outside Salesperson** – Shows sales credited to the sales representative responsible for acquiring new customers.
   - **Inside Salesperson** – Shows sales credited to the sales representative responsible for generating subsequent sales for the customer.
   - **Writer** – Shows sales generated by the employee who wrote the sales orders.
   - **Sales Source** – Shows sales by the location or origination point of the sale, for example, inside sales, counter sales, or showroom sales.
   - **Ship Via** – Shows sales based on the method used to transport the items to the customer.
   - **Price Line** – Shows sales based on the price line of the products sold.
   - **Sell Group** – Shows sales based on the pricing rules set for the products sold.
   - **Buy Line** – Shows sales based on the buy line of the products sold.

- **Buy Group** – Shows sales based on the costing rules for the products sold.
- **Product GL Type** – Shows sales based on the product category, such as electrical or plumbing.
- **Product Select Code** – Shows sales based on a user-defined product selection code.
- **Product Status** – Shows sales based on the inventory status of the products, such as stock, nonstock, miscellaneous charge, or lot item.
- **Commodity Code** – Shows sales based on the material type or commodity classification.
- **Product Budget Group** – Shows sales based on the sales budget group of the products sold.

5. In the **Display** field, enter one of the following values:
   - **Sales $** – Shows the dollar amount of the sales generated.
   - **COGS $** – Shows the cost of goods sold.
   - **COGS GP$** – Shows the amount of profit your company receives, based on the cost of goods sold.
   - **COGS GP%** – Shows the percentage of the sales dollars generated that your company has received as profit, based on the cost of goods sold.
   - **Comm $** – Shows the dollar amount of the cost used to calculate commissions.
   - **Comm GP$** – Shows the amount of profit your company receives, based on the commission cost.
   - **Comm GP%** – Shows the percentage of the sales dollars generated that your company has received as profit, based on the commission cost.
6. In the **Columns** field, select one of the following column views:
   - **Month/YTD/LYTD/% Chg**
   - YTD/LYTD/% Chg
   - Last 12/Prior 12/% Chg
   - Month/Prior Mth/% Chg
   - Month/Month LY/% Chg
   - Quarter/Prior Qtr/% Chg
   - Quarter/Qtr LY/% Chg
7. In the **Sort Column** field, enter the column by which to sort the information.

   Note: Selections vary depending on the value selected in the **Columns** field.
8. In the **Sales Type** field, enter one of the following values to determine the type of sales data to view:

- **Net Stock&Direct** – Shows sales and profit after taxes for all stock and direct orders.
- **All** – Shows stock and direct sales and profit before taxes, less any item returns.

Note: Because miscellaneous charge items have no cost associated with them, they tend to artificially distort the profit margin upward. For this reason, they are excluded from the calculations.

- **Stock&Direct Sales** – Shows sales and profit before taxes for all stock and direct orders.
- **Stock Sales** – Shows sales and profit before taxes for orders shipped from your inventory to the customer.
- **Direct Sales** – Shows sales and profit before taxes for orders shipped from the vendor's inventory to the customer.
- **Misc Sales** – Shows sales and profit before taxes for miscellaneous charges such as restocking fees or labor charges.
- **Stock&Direct Returns** – Shows negative dollar amounts for returned stock and direct items.
- **Stock Returns** – Shows negative dollar amounts for items returned by the customer to your inventory.
- **Direct Returns** – Shows negative dollar amounts for items returned by the customer to the vendor's inventory.
- **Misc Returns** – Shows negative dollar amounts for miscellaneous charges credited to the customer.
- **Net Stock** – Shows sales and profit after taxes for orders shipped from your inventory to the customer.
- **Net Direct** – Shows sales and profit after taxes for orders shipped from the vendor's inventory to the customer.
- **Net Misc** – Shows sales and profit after taxes for miscellaneous charges such as restocking fees or labor charges.

9. In the **Sort Order** field, to sort from lowest value to highest, enter **Ascending**; otherwise, enter **Descending**.
10. With the cursor in the **Sort Order** field, press **Enter** to display sales data based on your selection criteria.
11. Review sales information based on the value selected in the **Columns** field.
12. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Sales Category Inquiry window also offers these options:

To...	Use this hot key...
change the branch or territory code	**Branch** The cursor moves to the **Br/Tr/ALL** field. Type the new value and press **Enter** to update the screen.
change the date as of which to view the sales information	**Date** The cursor moves to the **Date** field. Type the new value and press **Enter** to update the screen.
change the sales category	**Category** The **Category** selection list displays. Select the new value and press **Enter** to update the screen.
change the type of price or cost information that displays	**Display** The **Display** selection list displays. Select the new value and press **Enter** to update the screen.
change to a different column view	**Columns** The **Columns** selection list displays. Select the new value and press **Enter**. If your selection in the **Sort Column** field no longer applies, the **Sort Column** selection list displays. Select a new value and press **Enter** to update the screen.
change the primary sort column	**Sort C** The **Sort Column** selection list displays. Select the new value and press **Enter** to update the screen.
change the sales type	**Sales Type** The **Sales Type** selection list displays. Select the new value and press **Enter** to update the screen.
change the sort order	**Sort O** The **Sort Order** selection list displays. Select the new value and press **Enter** to update the screen.

See Also:

Management Inquiries Overview

Comparing Monthly or Yearly Customer-Specific Sales

Comparing Monthly or Yearly Customer-Specific Sales

To compare monthly and yearly sales for a specific customer, run the Customer/Price Line Inquiry. While the window name implies that the inquiry is specifically for price lines, you can also review sales for the customer by a variety of other categories as well, such as buy line, commodity code, or product status. You can use the inquiry to compare the customer's buying habits from month to month or year to year. You can also drill-down into the sales or inventory details for the customer, if needed.

To compare sales figures for a specific customer:

1. From the **Reprts > Management Inquiries** menu, select **Customer/Price Line Inquiry** to display the Customer/Price Line Inquiry screen.
2. In the **Br/Tr/All** field, enter the codes that identify the branches or territories for which to view sales data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Category** field, enter one of the following values:
   - **Price Line** – Shows sales based on the price line of the products sold.
   - **Buy Line** – Shows sales based on the buy line of the products sold.
   - **Sell Group** – Shows sales based on the pricing rules set for the products sold.
   - **Commodity Code** – Shows sales based on the material type or commodity classification.
   - **Select Code** – Shows sales based on a user-defined product selection code.
   - **Sales Type** – Shows sales based on the category of product, such as electrical or plumbing.
   - **Product Status** – Shows sales based on the inventory status of the products, such as stock, nonstock, miscellaneous charge, or lot item.
   - **Ship Via** – Shows sales based on the method used to transport the items to the customer.
   - **Sales Source** – Shows sales by the location or origination point of the sale, for example, inside sales, counter sales, or showroom sales.
4. In the **Customer** field, enter the name of the customer whose sales statistics you want to review.
5. In the **As Of Date** field, enter the date as of which to view sales information. The default is today's date.
6. With the cursor in the **As Of Date** field, press **Enter** to display sales information based on your selection criteria.
7. Review the following information, as needed:

Note: The inquiry shows all sales less returns. To view only a certain type of sales, such as **Net Direct**, use the **Sales Type** hot key.

Column	Description
<Category>	The values associated with the category selected in the **Category** field. The system sorts the report in ascending order by this column. To sort by a different column, use the **Sort** hot key. **Note:** In most cases, the column name reflects only the second word in the category, such as **Line** to represent the price line or buy line. The only exception is the ship via, which displays as **Ship Via**.
MTD$	Shows the sales generated for the month specified in the **As Of Date** field.
<MTD GP%>	Shows the percentage of the sales dollars your company received as profit for the month specified in the **As Of Date** field.
LYMTD$	Shows the sales generated for the month specified in the **As Of Date** field, but in the previous year.
<LYMTD GP%>	Shows the percentage of the sales dollars your company received as profit for the month specified in the **As Of Date** field, but in the previous year.
Diff%	The percentage of increase or decrease in sales between the month you entered in the **As Of Date** field and the same month in the previous year.
YTD$	Shows the sales generated for the year specified in the **As Of Date** field.
<YTD GP%>	Shows the percentage of the sales dollars your company received as profit for the year specified in the **As Of Date** field.
LYTD$	Shows the sales generated for the year preceding the year specified in the **As Of Date** field.
<LYTD GP%>	Shows the percentage of the sales dollars your company received as profit for the year preceding the year specified in the **As Of Date** field.
Diff%	The percentage of increase or decrease in sales between the year you entered in the **Date** field and the previous year.

8. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Working With Sales Information

The Customer/Price Line Inquiry screen also offers these options:

To...	Use this hot key...
view the results for a different date	**As Of Date** At the **Enter new date** prompt, enter the numerical two-digit month and two-digit year and press **Enter** to update the screen.

To...	Use this hot key...
change the type of sales data that displays	**Sales Type** The Sales Type selection list displays. Select one of the following values to determine the type of sales data to view: • **All** – Shows stock and direct sales before taxes, less any item returns. **Note:** Because miscellaneous charge items have no cost associated with them, they tend to artificially distort the profit margin upward. For this reason, they are excluded from the calculations. • **Net Stock&Direct** – Shows sales after taxes for all stock and direct orders. • **Stock&Direct Sales** – Shows sales before taxes for all stock and direct orders. • **Stock Sales** – Shows sales before taxes for orders shipped from your inventory to the customer. • **Direct Sales** – Shows sales before taxes for orders shipped from the vendor's inventory to the customer. • **Misc Sales** – Shows sales before taxes for miscellaneous charges such as restocking fees or labor charges. • **Stock&Direct Returns** – Shows negative dollar amounts for returned stock and direct items. • **Stock Returns** – Shows negative dollar amounts for items returned by the customer to your inventory. • **Direct Returns** – Shows negative dollar amounts for items returned by the customer to the vendor's inventory. • **Misc Returns** – Shows negative dollar amounts for miscellaneous charges credited to the customer. • **Net Stock** – Shows sales after taxes for orders shipped from your inventory to the customer. • **Net Direct** – Shows sales after taxes for orders shipped from the vendor's inventory to the customer. • **Net Misc** – Shows sales after taxes for miscellaneous charges such as restocking fees or labor charges.
view the sales history for the selected customer	**Detail** Select **Sales History by Customer** from the list to display the Sales History Summary by Customer screen.
view the inventory history for the selected customer	**Detail** Select **Customer Inventory History Ledger** from the list to display the Customer Inventory History Ledger screen.
sort the inquiry by a different column	**Sort** The **Sort By** selection list displays. Select a value to display the data by that value. Alphanumeric values sort alphabetically from A to Z, whereas numeric values sort from highest amount to lowest. Values vary based on the value entered in the **Category** field.

To...	Use this hot key...
change the sales category	**Category** The **Category** selection list displays. Select a value and press **Enter** to update the screen.

See Also:

Management Inquiries Overview

Viewing Sales Information by Category

Comparing Yearly Sales by Price Line

Comparing Yearly Sales by Price Line

To view the sales and gross profit generated during the year for a specific price line and compare the sales performance with other years, run the Price Line Sales Inquiry. This inquiry shows you a month-by-month picture of how much revenue you brought in, and tells you what your gross profit percentage was. In addition, you can determine how much more or less you made this year as opposed to the previous year.

To compare this year's with last year's sales for a specific price line:

1. From the **Reprts > Management Inquiries** menu, select **Price Line Sales Inquiry** to display the Price Line Sales Inquiry screen.
2. In the **Br/Tr/All** field, enter the codes that identify the branches or territories for which to view sales and gross profit data. Enter commas between codes. To view data for all branches, enter **ALL**.
3. In the **Price Line** field, enter the price line for which to view sales data.

   Note: Price lines are defined in the Price Line Maintenance window and assigned to products in Product Maintenance.

4. With the cursor in the **Price Line** field, press **Enter** to display sales and profit data based on your selection criteria.
5. Review the following information for each month, as needed:

Column	Description
Month	The month in which the sales activity occurred.
Year <last year>	Shows the sales generated for the year preceding the current year. For example, if the current year is 2007, this column displays sales generated during 2006.
GP%	Shows the percentage of the sales dollars your company received as profit for the year preceding the current year.
Year <current year>	Shows the sales generated for the current year.
GP%	Shows the percentage of the sales dollars your company received as profit for the current year.
% Diff	The percentage of increase or decrease in sales dollars between the previous year and the current year.

6. When you have finished viewing information, press **Esc** to exit the screen.

More Options for Reviewing Sales Information

The Price Line Sales Inquiry window also offers these options:

To...	Select this menu option...
view sales generated during an earlier year	**< (Change Year)**
return to the current year information after viewing sales for an earlier year	**> (Change Year)**
change the type of sales data that displays	**Sales Type** The **Sales Type** selection list displays. Select one of the following values to determine the type of sales data to view: • **All** – Shows stock and direct sales and profit before taxes, less any item returns. **Note:** Because miscellaneous charge items have no cost associated with them, they tend to artificially distort the profit margin upward. For this reason, they are excluded from the calculations. • **Stock&Direct Sales** – Shows sales and profit before taxes for all stock and direct orders. • **Stock Sales** – Shows sales and profit before taxes for orders shipped from your inventory to the customer. • **Direct Sales** – Shows sales and profit before taxes for orders shipped from the vendor's inventory to the customer. • **Misc Sales** – Shows sales and profit before taxes for miscellaneous charges such as restocking fees or labor charges. • **Stock&Direct Returns** – Shows negative dollar amounts for returned stock and direct items. • **Stock Returns** – Shows negative dollar amounts for items returned by the customer to your inventory. • **Direct Returns** – Shows negative dollar amounts for items returned by the customer to the vendor's inventory. • **Misc Returns** – Shows negative dollar amounts for miscellaneous charges credited to the customer. • **Net Stock** – Shows sales and profit after taxes for orders shipped from your inventory to the customer. • **Net Direct** – Shows sales and profit after taxes for orders shipped from the vendor's inventory to the customer. • **Net Misc** – Shows sales and profit after taxes for miscellaneous charges such as restocking fees or labor charges.

See Also:

Management Inquiries Overview

Comparing Monthly or Yearly Customer-Specific Sales

EGraph Overview

The EGraph application is an MS Windows®-based tool you will use to view or print the graphs you create using the character-based Eclipse Information System (EIS) application. You will select a series of graph options on the Eclipse Information System screen, and when you click the category for which to graph data, such as a bill-to customer, a pay-to vendor, a sales representative, a price line, or a sales source, the system creates a graph and displays it in the Eclipse Egraph window.

This application can also be used to create graphs from the data on the Business Summary screen and the A/R Inquiry screen.

Once you have displayed a graph, you can change its format. For example, if you would rather view the data as a pie chart instead of as a bar graph, you can click a button and EGraph changes the graph into a pie format. You can change the text style, color, and size to be consistent with a presentation you are giving. You can even drill down into a subset of the data and display it on the graph, if needed.

Important: This help system assumes that you have a working knowledge of the Windows operating system.

See Also:

Setup Requirements for EGraph

Setup Requirements for EGraph

The EGraph application is a companion to the Eclipse Information System (EIS) and must be installed on the computer of any employee who will create graphs from EIS. Your company should have received the EGraph executable file when EIS was installed on your system. If you did not, call Eclipse Technical Support to obtain a copy.

See Also:

EGraph Overview

Starting the Eclipse EGraph Application

Before you can work with graphs, you must start the application. You can use any of the following three methods to do this:

To start the Eclipse EGraph application from...	Do this...
Windows	From the **Start** menu, select **Programs > Eclipse > EGraph**.
ETerm	Select graph options on the Eclipse Information System screen. When you select a value in the Sales Graphs or Purchases Graphs area, the system creates the graph and displays the Eclipse EGRAPH window.
an EGraph graph (.grf extension)	Double-click a file that has a **.grf** extension. This will not open the file, only the application. **Note:** The first time you do this, Windows will ask you to identify the program to use to open the graph. Click the **Browse** button, select the **Eclipse** folder under the **Program Files** folder, select the **EGraph** folder, and double-click **egraph.exe** to return to the Open With window. Select the **Always use the selected program to open this kind of file** check box, if needed, and click **OK** to display the Eclipse EGRAPH window.

See Also:

EGraph Overview

Setup Requirements for EGraph

Saving Graphs

After you create a graph in EIS, you may want to save it for further review or comparison purposes. If you have made changes to it, such as a different graph format, you will not be prompted to save that format when you close the graph. You must deliberately save the graph if you want to maintain that format.

To save a graph:

1. If you have more than one graph open, bring the one you want to save to the forefront.
2. From the **File** menu, select **Save Graph As** to display the Save Graph As window.
3. In the **File name** field, enter a file name that will help you to quickly identify the graph.

   You may want to include the as of date in the file name for comparison purposes.
4. Click **Save** to save the graph with a **.grf** extension.

See Also:

Closing Graphs

Saving Graph Collections

If you have created a series of related graphs, you may want to maintain them in a group. When you do this, any time you want to display the graphs, they all open at the same time. If you close the collection, all of the graphs in the collection are closed at the same time. You can add or remove graphs from the collection at any time.

To save a collection of graphs:

1. Do any of the following, as needed:
   - Close any open graphs that do not belong in the collection.
   - Create any additional graphs that should be in the collection.
   - Display any saved graphs that should be in the collection.
2. From the **File** menu, select **Save Collection As** to display the Save Collection As window.
3. In the **File name** field, enter a file name that will help you to quickly identify the graph collection.

   You may want to include the as of date in the file name.
4. Click **Save** to save the group of graphs with a **.col** extension.

See Also:

Saving Graphs

Displaying Saved Graphs

If you save a graph or a collection of graphs you created using EIS, you can open and display them in the Eclipse EGraph window.

> **Note:** This instruction is based on the functionality of Microsoft Windows XP 2002. While the buttons may differ in your version of Windows, the essence of the instruction should still assist you in completing this task. If not, consult the MS Windows® online help for additional assistance.

To display a saved graph or collection of graphs:

1. From the **File** menu, select **Open Collection/Graph** to display the Open Graph/Collection window.
2. Browse to the folder in which your graphs are stored, if needed.

   Note: The application remembers the last place you stored graphs and opens that folder in subsequent sessions.

3. Select a graph (.grf extension) or a collection (.col extension) and click **Open** to display the requested file in the Eclipse EGraph window.

See Also:

EGraph Overview

Starting the Eclipse EGraph Application

Viewing Multiple Graphs

When you have multiple graphs open in the Eclipse EGRAPH window, you can use the options under the Window menu to arrange them in such a way as to view more than one simultaneously.

To view multiple graphs in the Eclipse EGraph window:

1. Display two or more graphs in the Eclipse EGraph window.
2. From the **Window** menu, select one of the following options:

To...	Select this menu option...
stack the graphs so that you can view each of their titles	**Cascade Windows**
arrange the graphs top to bottom	**Horizontal Tile**
arrange the graphs side by side	**Vertical Tile**

3. To display a graph full size, select it and do one of the following:
   - Double-click the title bar.
   - From the **Window** menu, select **Default Tile**.

Saving Changes to Graphs

After you have saved a graph, if you make changes to it that you want to keep, you need to save it again. You can save the changes in the original file or create a new file so that the original file is unaffected by the change.

To save the changes to the original file:

1. If you have more than one graph open, bring the one you want to save to the forefront.
2. From the **File** menu, select **Save Graph**.

   The application saves the changes to the current file.

To save the changes to a new file:

1. If you have more than one graph open, bring the one you want to save to the forefront.
2. From the **File** menu, select **Save Graph As** to display the Save Graph As window.
3. In the **File name** field, change the file name to distinguish it from the original.
4. Click **Save** to save the graph with a **.grf** extension.

Saving Changes to Graph Collections

After you have saved a collection of graphs, if you make changes to any of the graphs in it that you want to keep, you need to save the collection again. You can save the changes in the original file or create a new file so that the original file is unaffected by the change.

To save the changes to the original file:

1. Do any of the following, as needed:
   - Close any open graphs that do not belong in the collection.
   - Create any additional graphs that should be in the collection.
   - Display any saved graphs that should be in the collection.
2. From the **File** menu, select **Save Collection**.

   The application saves the changes to the current file.

To save the changes to a new file:

1. Do any of the following, as needed:
   - Close any open graphs that do not belong in the collection.
   - Create any additional graphs that should be in the collection.
   - Display any saved graphs that should be in the collection.
2. From the **File** menu, select **Save Collection As** to display the Save Collection As window.
3. In the **File name** field, change the file name to distinguish it from the original graph collection.
4. Click **Save** to save the group of graphs with a **.col** extension.

Printing Graphs

If you want to present a graph in a meeting, you may want to print it so that everyone can have a copy of it. If you are writing a report, sometimes having a graphical representation of the sales figures can help get your point across more effectively.

To print a graph:

1. If you have more than one graph open, bring the one you want to print to the forefront.

   Note: You cannot print all of the graphs in a collection at the same time. You must print them individually.

2. From the **File** menu, select **Print Graph** to display the Print window.
3. Make changes to the print settings, as needed.

   Note: For best results, select a color printer.

4. Click **Print** to send the graph to the printer.

Closing Graphs

When you have finished viewing a graph, you can close it without exiting out of the application, if needed.

To close a graph:

1. If you have more than one graph displayed in the Eclipse EGraph window, click the graph to close to select it.
2. Save changes to the graph, as needed.
3. Do one of the following:
   - Click the **X** in the upper right corner of the graph's window.

   Important: Do not click the **X** in the upper right corner of the application window. This closes the entire program.

   - From the **File** menu, select **Close Graph**.

   If you made any unsaved changes to the graph, you will not be prompted to save them before it closes.

See Also:

Closing Collections of Graphs

Displaying Saved Graphs

Closing Graph Collections

If you have opened several graphs, you can close them as a group without exiting the application, if needed.

To close a collection of graphs:

1. If you opened a series of related graphs and want to maintain them together, save them as a collection.
2. Save changes to the individual graphs within the collection, as needed.
3. From the **File** menu, select **Close Collection**.

   If you made unsaved changes to any of the graphs, the application does not prompt you to save them.

See Also:

Closing Graphs

Displaying Saved Graphs

Closing All Displayed Graphs and Collections

To clear the EGraph window of all open graphs and collections of graphs, use the Clear function.

Note: The application does not save changes made since your last save.

To close all displayed graphs and collections:

1. Save changes to any graphs or collections, as needed.
2. From the **Clear** menu, select **All**.
3. At the confirmation message, click **OK**.

   All graphs and collections close, and changes made after your last save are rejected.

Exiting the Eclipse EGraph Application

When you have finished working with graphs, close the Eclipse EGraph window.

To exit the Eclipse EGraph application:

1. Save graphs or collections, as needed.
2. Do one of the following:
   - Click the **X** in the upper right corner of the application window.
   - From the **File** menu, select **Exit**.

Exporting Graph Data to Text Files

If you would like to manipulate the data from a graph outside of Eclipse EGraph, you can export the graph data to a text file. You have the option to select a character to use to separate the individual pieces of data, and you can export the row and column labels needed.

To export graph data to a text file:

1. Create or display the graph to export.
2. From the **File** menu, select **Export Data** to display the Export window.
3. In the **Delimiter** area, select one of the following options to determine the character to use to separate the individual pieces of data:
   - **Tab**
   - **Space**
   - **Comma**
   - **Semicolon**
   - **Other**
4. In the **Options** area, select or deselect the following check boxes, as needed:
   - **Include Row Labels** – Adds the row labels from the graph as a row header in the data file.
   - **Include Series Labels** – Adds the series labels from the graph as a column header in the data file.
5. Click **Save As** to display the Enter a filename for the exported data file window.
6. Browse to the folder in which to store the text file.
7. In the **File name** field, enter a file name that will help you to quickly identify the graph data.
8. Click **Save** to create a file with a **.txt** extension.

   Note: If you want to open the text file in MS Excel®, be sure to use the same delimiter you selected in step 3 to format the data in the spreadsheet.

Copying Graphs to Other Applications

If you want to use a graph for a presentation or report, you can copy it from the Eclipse EGraph window and paste it into another application, such as MS Word or MS PowerPoint.

To copy a graph in EGraph:

1. Create or display a graph in the Eclipse EGraph window.
2. From the **Edit** menu, select **Copy**.
3. Open the application to which to copy the graph.
4. Press **Ctrl+V** to paste the graph into the document.

Increasing the Size of Graphs

The Eclipse EGraph window has no zoom feature. When you create a graph, it displays at maximum size. However, when you save and close it, and then re-open it, it shrinks to about one-fourth of its original size. This instruction shows how to return it to its maximum size.

To increase the size of a graph:

1. Display a saved graph.
2. From the **Edit** menu, select **Show/Hide ToolBar**. The graph displays at full size.
3. To return the toolbar to its previous view mode, select **Show/Hide ToolBar** again.

Selecting Graph Data Subsets

The Cross Tab table is a grid with one dimension of the graph (such as months) listed down the left side and the other dimension (such as years) listed across the top. The grid is then populated with the actual values that are plotted on the graph.

You cannot change any of the values or labels in a cross tab table and you cannot print or copy the data in this spreadsheet format, but you can change what is displayed on a graph by selecting certain subsets of the data in the table.

For example, if you create a chart that has more than one set of data, such as a "this year vs. last year" sales comparison, if you change the format to a pie chart, EGraph can graph only one set of data at a time, so it selects the first set of data. You can graph the other sets of data by selecting other columns in cross tab view.

To select a data subset to graph:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following to display the cross tab view:
   - Click the  button.
   - From the **Graph** menu, select **Cross Tab**.
3. Do one of the following:

To select...	Do this...
a column of data	Click a column heading.
several consecutive columns of data	Click the first column heading, press and hold the **Shift** key, and click the last column heading.
a row of data	Click a row heading.
several consecutive rows of data	Click the first row heading, press and hold the **Shift** key, and click the last row heading.
several contiguous cells of data	Position the mouse pointer over the first cell to select, press and hold the left mouse button, drag the pointer diagonally to the opposite corner of the group of cells, and then release the mouse button.
display all data, provided the intended graph format supports it	Click the first cell in the table.

   Note: You cannot select non-consecutive rows or columns.

4. Click a graph format to display the selected data.

Changing the Graph Formatting Toolbar View Mode

The graph formatting toolbar is located on the upper left side of the Eclipse EGRAPH window. However, all of the options on the toolbar are also available under the **Graph** menu, so if you want to maximize the space in the EGRAPH window, you can hide the tool bar. If you find that the toolbar makes your life easier, you can always bring it back. For more information about the toolbar, see Graph Formatting Toolbar Features.

To change the view mode of the graph formatting toolbar:

1. To hide the toolbar, from the **Edit** menu, select **Show/Hide ToolBar**.

   To change the graph format while the toolbar is hidden, from the **Graph** menu, select any of the menu items.

2. To re-display the toolbar, from the **Edit** menu, select **Show/Hide ToolBar**.

Creating Line Charts

A line chart (by default) uses dots connected by a line to indicate the data points in the graph. Each data set of information is represented by a line with a different color. The three-dimensional chart lines have a tape-like depth.

To create a line chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:

To display the graph data in a...	Select one of these methods...
two-dimensional line chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select **2D Line Chart**. • Click the  button and select the **Line** button.
three-dimensional line chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select 3**D Line Chart**. • Click the  button, click the **3D Gallery** tab, and select the **Tape** button.

3. Set any of the following options, as needed:

To...	Click this tab...
add sticks, lines, or symbols to a two-dimensional graph	**Style**
work with the graph data	**Data**
edit the graph titles	**Titles**
change the appearance of a three-dimensional graph	**3D** **Note:** You can also click the left, right, up, or down arrow buttons in the lower left corner of the graph window.
change the style and size of the text on the graph	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the graph	**Background**

4. Save your changes.

Creating Area Charts

An area chart uses dots connected by a line to represent the data points in the graph, and then fills in the area below the line. Each data set of information is represented by an area with a different color. The three-dimensional area chart adds depth to the area. Each data set of information is represented by an area with a different color.

To create an area chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:

To display the graph data in a...	Select one of these methods...
two-dimensional area chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select **2D Area Chart**. • Click the  button and select the **Area** button.
three-dimensional area chart format	• Click the  button on the graph formatting toolbar. **OR** • From the **Graph** menu, select **3D Area Chart**. • Click the  button, click the **3D Gallery** tab, and select the **Area** button.

3. Set any of the following options, as needed:

To...	Click this tab...
further define the area chart style	**Style**
work with the graph data	**Data**
edit the graph titles	**Titles**
change the appearance of a three-dimensional graph	**3D** **Note:** You can also click the left, right, up, or down arrow buttons in the lower left corner of the graph window.
change the style and size of the text on the graph	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the graph	**Background**

4. Save your changes.

Creating Bar Charts

A bar chart uses a bar to represent each data point in the graph. Each data set is represented by bars of a different color. The three-dimensional bar chart uses columns to represent each data point in the graph. Each data set is represented by a different column color. This type of graph is good for showing the relationships between two or more data sets of information.

To create a bar chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:

To display the graph data in a...	Select one of these methods...
two-dimensional bar chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select **2D Bar Chart**. • Click the  button and select the **Bar** button.
three-dimensional bar chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select **3D Bar Chart**. • Click the  button, click the **3D Gallery** tab, and select the **Line** button. **Note:** This is the type of chart the system creates initially when you run the Eclipse Information System program.

3. Set any of the following options, as needed:

To...	Click this tab...
further define the bar chart style	**Style**
work with the graph data	**Data**
edit the graph titles	**Titles**
change the appearance of a three-dimensional graph	**3D** **Note:** You can also click the left, right, up, or down arrow buttons in the lower left corner of the graph window.
change the style and size of the text on the graph	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**

To...	Click this tab...
change the style of the background elements on the graph	**Background**

4. Save your changes.

Creating Pie Charts

In a pie chart, the data points in the graph are represented as sections of a circle. This type of graph can be used for a single data set only. The three-dimensional pie chart adds thickness to the pie slices.

To create a pie chart from a graph with multiple data sets, first display your data in the Cross Tab format. In the Cross Tab, select the data set to graph, then select the Pie Chart format to display the graph.

The pie chart styles affect the labels on the slices of the pie.

To create a pie chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:

To display the graph data in a...	Select one of these methods...
two-dimensional pie chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select **2D Pie Chart**. • Click the  button and, under the **2D Gallery** tab, select **Pie**.
three-dimensional pie chart format	• Click the  button on the graph formatting toolbar. • From the **Graph** menu, select **3D Pie Chart**. • Click the  button, click the **3D Gallery** tab, and select **Pie**.

If the graph has more than one set of data points, the application selects the first set of data for the pie chart. To use a different set of data, see Selecting Graph Data Subsets.

3. Set any of the following options, as needed:

To...	Click this tab...
change the appearance of the pie chart labels	**Style**
work with the graph data	**Data**
edit the chart titles	**Titles**

To...	Click this tab...
change the appearance of a three-dimensional chart	**3D** **Note:** You can also click the left, right, up, or down arrow buttons in the lower left corner of the graph window.
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Polar Charts

The polar chart is essentially a line chart drawn on a circular grid. The line relates values to angles. Like logarithmic graphs, polar graphs are useful primarily in mathematical and statistical applications. In a polar graph, the independent variable is charted on the angular axis, based on an origin (zero point) of three o'clock. The dependent variable is charted on the radial axis, with the origin at the center of the circle. Polar graphs can chart multiple data sets, each represented by a single line, with as many data points as are meaningful.

If you don't supply an angular position for each data point, the Graph control automatically places the first point at an angle of 0, with subsequent points at increments of 360 (degrees) divided by the total number of points.

To create a polar chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button and then click the **Polar** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Polar** button.
3. Set any of the following options, as needed:

To...	Click this tab...
add sticks, lines, or symbols to the chart	**Style**
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Bubble Charts

The bubble graph lets you chart three variables in two dimensions. It is a special form of the scatter graph in which the size of a circular marker (the bubble) for a data point is used to represent a value. For example, the size of a bubble might represent a product's percentage of gross sales; the bubble's position along the Y axis might represent market size; and the position along the X axis might represent the number of competing products.

In a bubble graph, all three variables are independent. You can choose which variable to show on the X axis, which to show on the Y axis, and which to show by the size of the bubble.

You must supply values for the X position, Y position, and bubble size for each point. If you have access to the Data property page, you can set these values by pressing the X and Y Position button (the top row of the dialog contains the X positions and the bottom row the Y positions) and the Bubble Size button.

> **Note:** You can't draw curves on a bubble graph.

To create a bubble chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button and then click the **Bubble** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Bubble** button.
3. Set any of the following options, as needed:

To...	Click this tab...
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Scatter Charts

The 2D scatter graph consists of plotted points "scattered" around an X-Y grid. The pattern may reveal a relationship between the two variables measured by the X and Y axes. Scatter graphs can chart multiple data sets, each having any number of data points. Each set can be represented by a different symbol. You can display scatter plots alone, curves alone, or both together.

To create a scatter chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:

To display the graph data in a...	Select one of these methods...
two-dimensional area chart format	• Click the ... button and click the **Scatter** button. • From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Scatter** button.
three-dimensional area chart format	• Click the ... button, click the **3D Gallery** tab, and click the **Scatter** button. • From the **Graph** menu, select **Options**, and then, under the **3D Gallery** tab, click the **Scatter** button.

3. Set any of the following options, as needed:

To...	Click this tab...
add symbols to the chart	**Style**
work with the chart data	**Data**
edit the chart titles	**Titles**
enhance the three-dimensional features	**3D**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating GANTT Charts

The Graph control's Gantt chart is a specialized version of the horizontal bar graph in simple or stacked form. It is used almost exclusively to show a project schedule, with each bar or bar segment marking the start time, duration, and completion time of a task.

Depending on your needs, you can have each bar represent either a single task (one solid bar) or a sequence of tasks (stacked bar).

Gantt charts are made up of at least two data sets. The first set contains the values for the start point of each bar, and subsequent sets contain the end points of each bar segment. Unlike bar graphs, Gantt charts are always drawn horizontally and only in 2D form. The Graph control automatically places Gantt bars along the Y axis at increments of 1, starting at 1.

In default form, Gantt chart bars are drawn with no spaces between them. You can add spaces if you choose. Go to the Style property page and select the Spaced option. You can't show negative data points on a Gantt chart.

To create a GANTT chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button and then click the **Gantt** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Gantt** button.
3. Set any of the following options, as needed:

To...	Click this tab...
add spaces between the bars on the chart	**Style**
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating High-Low Close Charts

The high-low-close (HLC) graph lets you chart a range of values on an X-Y grid. The range is shown as a vertical bar, with horizontal crossbars for the high, the low, and a normative value usually called the close. An alternate version, the open-high-low-close (OHLC) graph, adds a fourth crossbar for another normative value usually called the open.

When you click the High-Low icon on the 2D Gallery property page, you get an HLC graph by default. To get an OHLC graph, go to the Style property page and select the 'Open' Values option.

An HLC graph must have three data sets (high, low, and close values), and an OHLC graph must have four data sets (open, high, low, and close values). There's no limit on the number of data points you can graph, but each data set should have the same number.

You can optionally draw the graph without the open and close bars, without the high and low bars, or with no bars at all. These options are available in the Style property page.

To create a high-low close chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the ... button and then click the **High-Low** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **High-Low** button.
3. Set any of the following options, as needed:

To...	Click this tab...
show or hide open values, high/low ticks, and open/close ticks	**Style**
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Candlestick Charts

The candlestick graph is an alternative to the open-high-low-close graph. It consists of a series of boxes, with lines extending up and down from the ends, drawn on an X-Y grid. The top and bottom of each box indicate the open and close values. If the open value is higher, the box is filled with a color; if the close value is higher, the box is filled with white. The ascending and descending lines indicate the high and low values for that point.

The candlestick graph requires four data sets (open, high, low, and close values), each of which should have the same number of data points.

If you don't supply an X position for each data point, the Graph control automatically places points at increments of 1, starting at 0.

No style variants are available.

To create a candlestick chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button and then click the **Candlestick** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Candlestick** button.
3. Set any of the following options, as needed:

To...	Click this tab...
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Box-Whisker Charts

The box-whisker graph illustrates the spread of data groups around their medians, using a "box" and "whiskers" to break down each data group by percentile.

In creating a box-whisker graph, you can either specify the seven percentile parameters for each symbol (provide "parametric" data) or supply a group of "raw" data for the Graph control to process and graph.

With raw data, you supply as many sets of data as you want and the Graph control computes percentile parameters. For example, if you are graphing the scores achieved by 24 students on five tests, you need 24 sets of data with five points per set. The control will analyze the data and draw five box-whiskers, one for each test. Each box-whisker will show the percentile distribution of scores for a single test.

With parametric data, you compute percentile data yourself and send it to the Graph control as exactly seven data sets, which specify the values at percentiles of 5, 10, 25, 50 (the median), 75, 90, and 95. The number of points within each set determines how many box-whiskers are drawn.

To create a box-whisker chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button and then click the **Box-Whisker** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Box-Whisker** button.
3. Set any of the following options, as needed:

To...	Click this tab...
determine the source of the data to display	**Style**
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Time Series Charts

Unlike other graphs, the time series graph shows open-ended streams of data, rather than finite data sets. This graph is ideal for plotting real-time data.

A time series graph is drawn on a dynamic X-Y grid. Points are added one at a time to the right-hand edge. When the graph reaches the limit of points it can show, the oldest data begins to drop off the left edge. As a result, the graph appears to move on the screen.

Time series graphs can chart multiple data sets, each represented by a single sequence of symbols.

Because time series graphs represent continuous streams of data, they must be displayed on screen to show all the data. Printouts of time series graphs can show only freeze-frames of the graph captured at particular times.

The data for a time series graph must be provided by the application. You cannot enter data for this type of graph from the property pages.

To create a time series chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button and then click the **Time Series** button.
   - From the **Graph** menu, select **Options**, and then, under the **2D Gallery** tab, click the **Time Series** button.
3. Set any of the following options, as needed:

To...	Click this tab...
work with the chart data	**Data**
edit the chart titles	**Titles**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

Creating Surface Charts

The surface graph lets you represent data topographically in three dimensions. The graph uses an X-Z grid drawn at regular increments in the X and Z directions, with one Y value for each X-Z intersection. The color scale of the graph is automatically keyed to the height of points, helping the viewer differentiate between higher and lower values.

A surface graph represents a minimum of two data sets and usually at least three. Each data set holds the Y values of a row of points along the X axis. The first set applies to the row of points perpendicular to the Z origin (the "back" of the graph), and subsequent sets apply to additional rows.

All panels of the surface graph (the rectangles formed by the X and Z grids) are colored according to their height. You specify the colors at the maximum and minimum points of the axis, and the Graph control interpolates colors between these points.

In drawing a surface graph, you can use lines to show the edges of each panel, fill each panel with a solid color, or use both lines and fills. You can also add side walls to the front and right edges of the graph if you choose. All of these options are available in the Style property page.

To create a surface chart:

1. Create or display a graph in the Eclipse EGraph window.
2. Do one of the following:
   - Click the  button, click the **3D Gallery** tab, and then click the **Surface** button.
   - From the **Graph** menu, select **Options**, and then, under the **3D Gallery** tab, click the **Surface** button.
3. Set any of the following options, as needed:

To...	Click this tab...
add markers, color grades, and sidewalls to the chart	**Style**
work with the chart data	**Data**
edit the chart titles	**Titles**
enhance three-dimensional features	**3D**
change the style and size of the text on the chart	**Fonts**
change the colors, patterns, or symbols that identify the data points or data sets	**Markers**
change the style of the background elements on the chart	**Background**

4. Save your changes.

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