



Ad-Hoc Reporting Tutorial

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There are many report selections that will allow you to generate reports. Ad Hoc Reporting is used most often because it is more customizable than other standard reports.

2.

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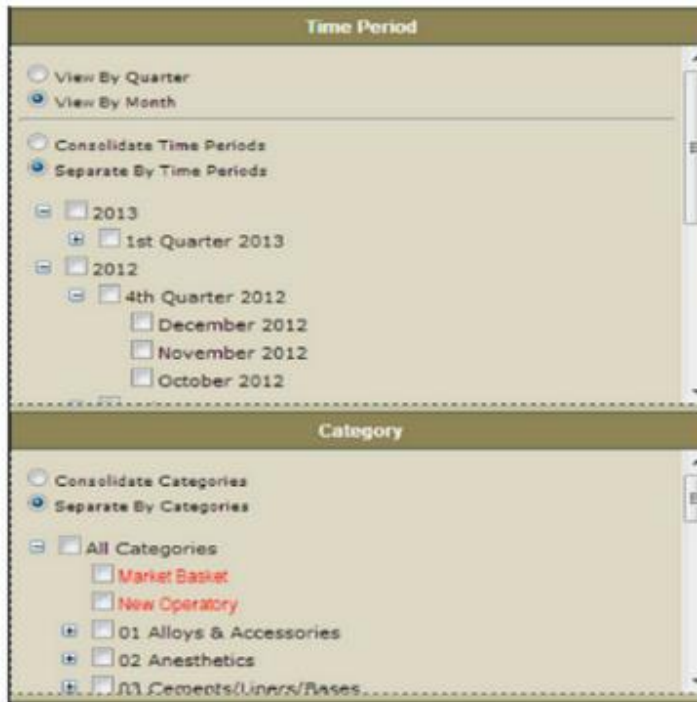
To begin, first navigate to the "Reports" tab at the top of the screen.

3.

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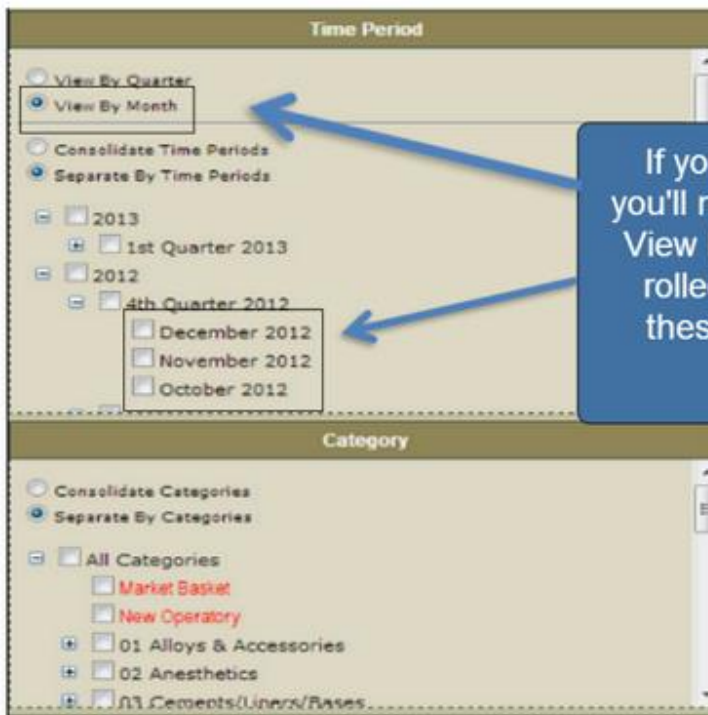
Then, select "Ad Hoc Reporting" and you are now ready to begin designing a report to generate.

4.



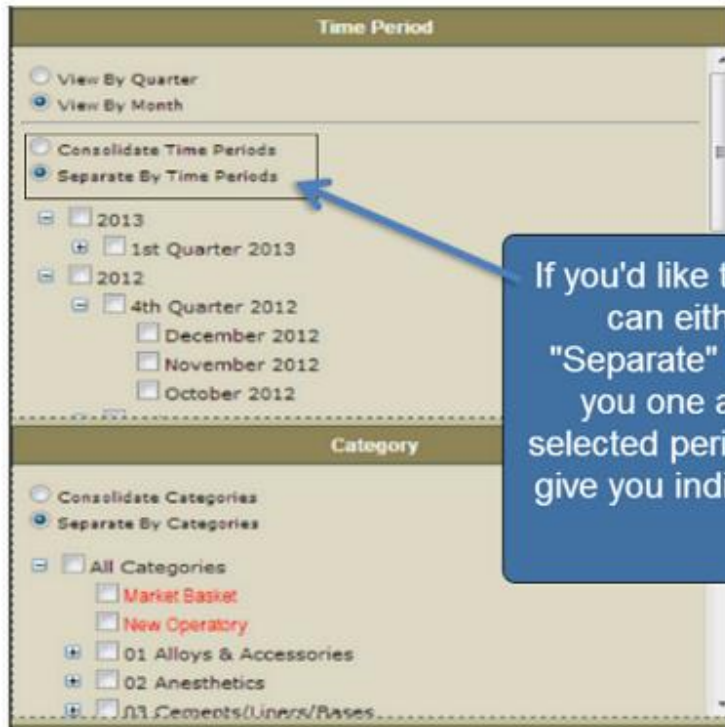
Begin by selecting your desired time period. Depending on your subscription, you may be able to select individual Quarters or Months.

5.



If you subscribe to monthly data, you'll notice some extra options here. View by Month and Monthly selects rolled under Quarters. Otherwise these options won't be available.

6.



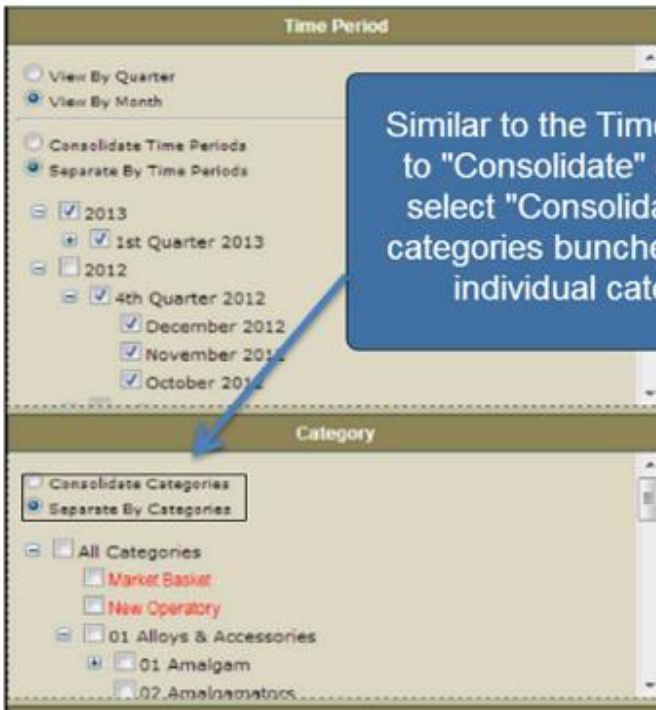
If you'd like to select multiple periods, you can either "Consolidate" them or "Separate" them. "Consolidate" will give you one amalgamated report for the selected periods. Whereas, "Separate" will give you individual reports for each period selected.

8.



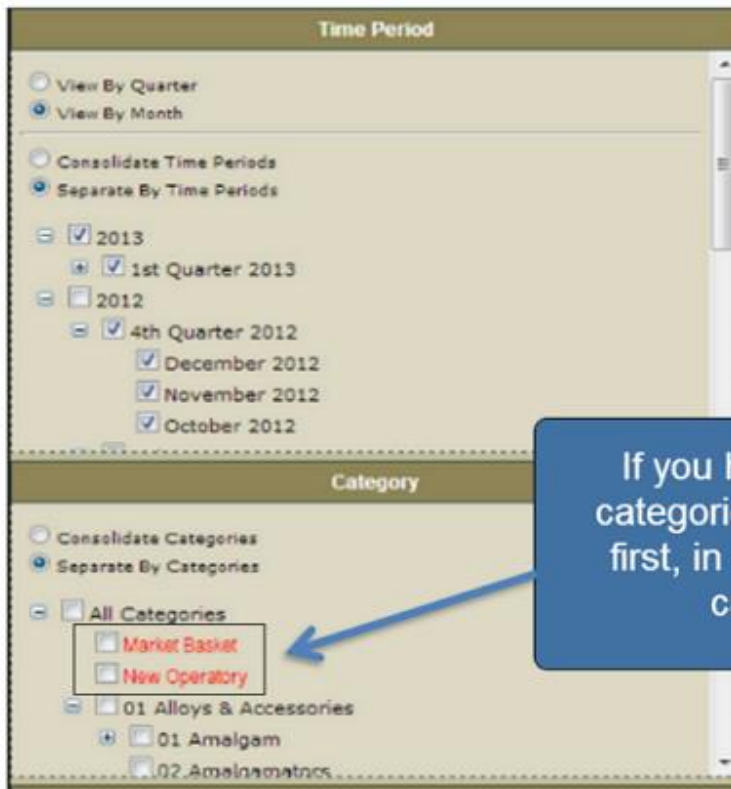
Now that we have our time period selected, it is time to choose our desired categories.

9.



Similar to the Time Period select, you have the option to "Consolidate" or "Separate" by Categories. If you select "Consolidate," you will get one report with all categories bunched together. "Separate" will give you individual category reports for each selected.

10.



If you have created any custom categories, you will see those here first, in red, before the rest of the categories are listed.

11.

The screenshot shows a software interface with three main sections: Category, Region, and Manufacturers/Brands. The Category section has a radio button for 'Consolidate Categories' and a selected radio button for 'Separate By Categories'. Under 'Separate By Categories', there is a tree view with 'All Categories' expanded, showing sub-items: '01 Alloys & Accessories' (unchecked), '01 Amalgam' (checked), '02 Amalgamators' (unchecked), '03 Amalgam Waste Management' (unchecked), and '02 Aesthetics' (unchecked). The Region section has a checked radio button for 'Total US' and several unchecked checkboxes for 'Mid Atlantic', 'Midwest', 'Mountain', 'Northeast', and 'Northwest'. Below the Region section are two sections: 'Manufacturers' with a red text prompt 'Refresh Mfg List from selected Categories' and 'Brands' with a red text prompt 'Refresh Brands from selected Categories'.

After selecting our category, we are ready to select our region. The most common selection here is Total US, but you are also able to select SDM pre-defined regions or your custom sales territories if they have been uploaded.

12.

This screenshot is identical to the one in slide 11, but with blue arrows pointing to the red text prompts. One arrow points from the 'Refresh Mfg List from selected Categories' text to the 'Manufacturers' section header, and another arrow points from the 'Refresh Brands from selected Categories' text to the 'Brands' section header.

Now that we've selected a category, you'll notice an option to "Refresh Mfg or Brands list from selected Categories."

13.

The screenshot shows a software interface with four main sections: **Category**, **Region**, **Manufacturers**, and **Brands**. Each section has a header bar and a list of items with checkboxes. In the **Category** section, 'Separate By Categories' is selected, and '01 Amalgam' is checked under 'All Categories'. In the **Region** section, 'Total US' and all regional options (Mid Atlantic, Midwest, Mountain, Northeast, Northwest) are checked. Below the **Manufacturers** and **Brands** sections, there is red text: 'Refresh Mfg List from selected Categories' and 'Refresh Brands from selected Categories' respectively.

If you'd like a comprehensive report on the selected categories including all brands and manufacturers, you can skip over these two parameter options.

14.

This is a close-up of the **Manufacturers** and **Brands** sections from the previous screenshot. The red text 'Refresh Mfg List from selected Categories' is in the Manufacturers section, and 'Refresh Brands from selected Categories' is in the Brands section. Two blue arrows point from a text box on the right to these two red text elements.

However, if you would like to view a specific report on a particular brand or manufacturer, select either of the Red text and wait for the list to populate.

15.

The screenshot shows two sections: "Manufacturers" and "Brands". Each section has a "Check/Uncheck All" checkbox and a list of items with individual checkboxes. In the "Manufacturers" section, the items are CARL HEYER, COLTENE/WHALEDENT, COOKSONS, and DENTSPLY CAULK. In the "Brands" section, the items are ARISTALLOY, CONTOUR, DISPERSALLOY, and DISPERSED PHASE. All checkboxes are currently unchecked.

Now you can select the specific brand or manufacturer you'd like included in your report.

16.

This screenshot is similar to the previous one but includes a "View Market Share" section at the bottom. It has two radio buttons: "Dollars" (which is selected) and "Units". Below this section is a "Generate Report" button. All checkboxes for manufacturers and brands are now checked.

The last parameter choice you can make is whether you'd like to view Market Share in Dollars or in Units.

17.

Manufacturers

Check/Uncheck All

- CARL HEYER
- COLTENE/WHALEDENT
- COOKSONS
- DENTSPLY CAULK

Brands

Check/Uncheck All

- ARISTALLOY
- CONTOUR
- DISPERSALLOY
- DISPERSED PHASE

View Market Share in:

Dollars

Units

"Market Share in Dollars" usually works best, especially if you are viewing multiple categories combined when unit definition might not be the same across categories. "Units Market Share" works well with equipment items or when a single category is selected

18.

Manufacturers

Check/Uncheck All

- CARL HEYER
- COLTENE/WHALEDENT
- COOKSONS
- DENTSPLY CAULK

Brands

Check/Uncheck All

- ARISTALLOY
- CONTOUR
- DISPERSALLOY
- DISPERSED PHASE

View Market Share in:

Dollars

Units

We are now ready to generate the report.

19.

| Manufacturer/Product | Month Sales \$ | Units | Unit Group | Avg. Price | Share/ Month | Share Change vs Prev Month | Share Change vs Last Year |
|---------------------------------------|--------------------|-----------|----------------|-----------------|---------------|----------------------------|---------------------------|
| DENTSPLY CAULK | | | | | | | |
| DISPERSALLOY | \$3,667.81 | 6 | By The 5 Ounce | \$611.30 | 25.7% | -33.9 | -14.3 |
| DENTSPLY CAULK Totals: | \$3,667.81 | 6 | | \$611.30 | 25.7% | -33.9 | -14.3 |
| ENGELHARD COR | | | | | | | |
| ARISTALLOY | | | | | | | 10.1 |
| ENGELHARD C | | | | | | | 10.1 |
| GOLDSMITH & RE | | | | | | | |
| ULTRA | \$250.00 | 1 | By The 5 Ounce | \$250.00 | 1.8% | N/A | 0.0 |
| GOLDSMITH & REVERE Totals: | \$250.00 | 1 | | \$250.00 | 1.8% | N/A | 0.0 |
| PRIVATE LABEL | | | | | | | |
| PRIVATE LABEL | \$5,516.75 | 16 | By The 5 Ounce | \$344.80 | 38.7% | 7.1 | -1.3 |
| PRIVATE LABEL Totals: | \$5,516.75 | 16 | | \$344.80 | 38.7% | 7.1 | -1.3 |
| SDI | | | | | | | |
| GS-80 | \$1,714.92 | 7 | By The 5 Ounce | \$244.99 | 12.0% | N/A | 3.6 |
| PERMITE | \$457.00 | 1 | By The 5 Ounce | \$457.00 | 3.2% | N/A | N/A |
| SDI Totals: | \$2,171.92 | 8 | | \$271.49 | 15.2% | N/A | 7.0 |
| WYKLE | | | | | | | |
| ORIGINAL D | \$220.49 | 1 | By The 5 Ounce | \$220.49 | 1.5% | N/A | N/A |
| WYKLE Totals: | \$220.49 | 1 | | \$220.49 | 1.5% | N/A | N/A |
| Category Totals: | \$14,271.97 | 41 | | \$348.10 | 100.0% | 1.5 | 3.0 |

This is the standard Ad-Hoc Report generated from the parameters we have just chosen.

20.

Current Report: US Ad Hoc Reporting

[View Print-Friendly](#) | [Export to Functional Excel](#)



US DPMSS Ad Hoc Report Criteria

Now that you have your report generated, there are a number of ways to export it.

Current Report: US Ad Hoc Reporting

[View Printer-Friendly](#) | [Export to Functional Excel](#)

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US DPMSS Ad Hoc Report Criteria

By selecting the floppy disk icon on the toolbar, you will be able to export to Excel, PDF and a number of other different file types.

22.

Current Report: US Ad Hoc Reporting

[View Printer-Friendly](#) | [Export to Functional Excel](#)

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US DPMSS Ad Hoc Report Criteria

You also have the option to "Export to Functional Excel." This is an Excel file that has stripped out the formatting seen in our reports and is best for working with and manipulating data in a more raw format.

