

# Customer Sales Report

## Sales Reports

This section covers various types of reports that can be generated from sales data for analysis and monitoring purposes.

## Report Module Guide: Customer Sales Report

### Module Location

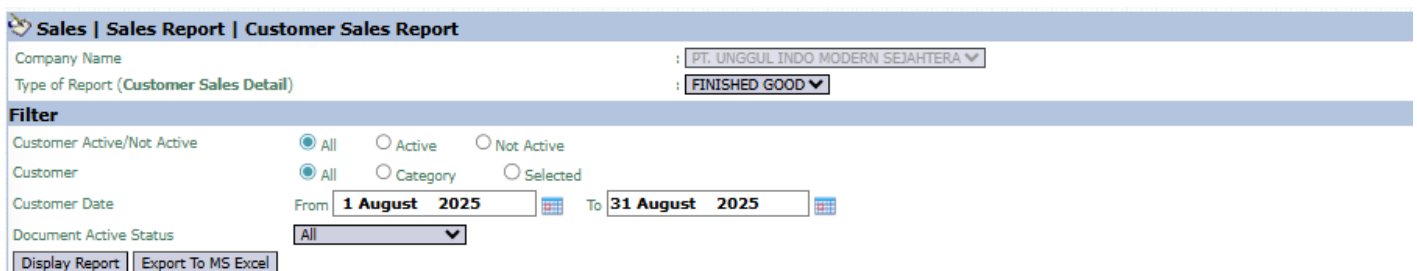
Sales > Reports > Customer Reports > Customer Sales Report

### Module Objective

The **Customer Sales Report** module is used to generate a detailed report that displays all sales transactions, grouped by customer. This report is very useful for analyzing the purchasing patterns and total sales volume of each customer within a specific time period.

## 1. Report Parameters (Filter)

The main page of this module is a form containing various parameters to customize the report that will be generated.



The screenshot shows the 'Customer Sales Report' filter form. At the top, the breadcrumb navigation is 'Sales | Sales Report | Customer Sales Report'. Below this, there are two dropdown menus: 'Company Name' set to 'PT. UNGGUL INDO MODERN SEJAHTERA' and 'Type of Report (Customer Sales Detail)' set to 'FINISHED GOOD'. A 'Filter' section follows, containing several options: 'Customer Active/Not Active' with radio buttons for 'All' (selected), 'Active', and 'Not Active'; 'Customer' with radio buttons for 'All' (selected), 'Category', and 'Selected'; 'Customer Date' with date pickers for 'From' (1 August 2025) and 'To' (31 August 2025); and 'Document Active Status' with a dropdown menu set to 'All'. At the bottom of the form are two buttons: 'Display Report' and 'Export To MS Excel'.

Here is an explanation for each parameter:

- **Customer Active/Not Active:**

- Filter customers by their active status, whether **All**, **Active**, or **Not Active**.

- **Customer:**

- Select the customer scope for the report: **All**, **Category** (by Category), or **Selected** (for a specific Customer).

- **Customer Date:**

- Specify the **From** and **To** date range to define the period of sales transactions to be displayed (e.g., August 1, 2025, to August 31, 2025).

- **Document Active Status:**

- Use this dropdown to filter by the active status of the sales documents.

## 2. Steps to Generate the Report

### Step 1: Set Report Parameters

Select all the parameters you need, especially defining the **Customer Date** range and the **Customer** scope.



### Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report:** To preview the customer sales report directly on your screen. [Display Report](#)

- **Export To MS Excel:** To download the report data in an Excel file format.

[Export To MS Excel](#)

### 3. Example of the Report View

After you click, the system will generate a detailed report like the following, which details every product purchased by each customer.

Print Close

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**P.T. UNIMOS**

Customer Sales Detail Periode 01 Aug 2025 - 31 Aug 2025

Printed On 07 Aug 2025 08:54:04

No.	Customer	Product Code	Product Name	2025-Agu		
				Qty	Curr	Net
1.	Dan Amnulah	0103120000008	Bs Sak ukuran 25 kg	520	IDR	8855.86
2.	Khusain-Bp-Sidarp	0103090100001	Bs Wa. Pireid	3340	IDR	1200.00
3.	Khusain-Bp-Sidarp	0103090100001	Bs Raject / Rusak Biskuit	430	IDR	2350.00
4.	Khusain-Bp-Sidarp	01030903040038	Bs Raject / Rusak Wafer Stick	570	IDR	2350.00
5.	Mega Global Food Industry	0101020100023	FlV Vanilla fimerich ND/W5 591224 T	5	IDR	372000.00
6.	Mega Global Food Industry	0101020200165	FlV2BCHMWS_6274	5	IDR	454923.00
7.	Mega Global Food Industry	0102010100043	PCF/wafer Butter 150 gr/OPP 20-CRP MET 20165 mm/Printing bank bulat oranga	63	IDR	418000.00
8.	Mega Global Food Industry	0102010100244	PCF/wafer Chocolate 150 gr/OPP 20-CRP MET 23165 mm/Printing bank bulat colise	25	IDR	418000.00
9.	Mega Global Food Industry	0102010100173	PCF/Metalize Bank Burung/NET12-CRMA30/195mm/Colise Pantone 4630C/1000m/01	50	IDR	473000.00
10.	Mega Global Food Industry	0102050000443	PS/Wafer Butter 100 gr (4x25gr)/Duplex 350 gsm/WB gloss/245x110x33 mm/CRM/autoboiling/label/05	90457	IDR	750.00
11.	Mega Global Food Industry	0102050000444	PS/Wafer Chocolate 100 gr (4x25gr)/Duplex 350 gsm/WB gloss/245x110x33 mm/CRM/autoboiling/label/04	77746	IDR	750.00
12.	Mega Global Food Industry	0102070000930	PD/wafer Butter 24 x 100 gr/BK130M130BK130CF/D 431x251x229mm/CRM/label/02	2100	IDR	3670.00
13.	Mega Global Food Industry	0102070000931	PD/wafer Chocolate 24 x 100 gr/BK130M130BK130CF/D 431x251x229mm/CRM/label/02	3022	IDR	3670.00
14.	Mega Global Food Industry	0102070001102	PD/KAKG74/Soft Crackers 400 gr/Sealed/6 buket/BK130M130BK130CF/D 431x251x229mm/Label/02	1940	IDR	4200.00
15.	Mega Global Food Industry	0102080001829	Sticker/Vacoli/Showbox Wafer Butter 100 gr/39x34mm/1 vama/bontax glossy/Lokal/00	30329	IDR	30.00
16.	Mega Global Food Industry	0102080001831	Sticker/Besar/Showbox Wafer Butter 100 gr/165x25mm/1 Warna/bontax glossy/Lokal/00	30324	IDR	65.00
17.	Mega Global Food Industry	0102100100369	PB/Body KAKG74/Soft Crackers Cheese 400 gr/label/03	52729	IDR	3960.00
18.	Mega Global Food Industry	0102100100370	PB/Lid KAKG74/Soft Crackers Cheese 400 gr/label/03	52729	IDR	990.00
19.	Mega Global Food Industry	0104010010081	WUK/Magetic White Coffee 48 gr/10 pcs x 6 ball/00	600	IDR	86781.60
20.	Mega Global Food Industry	0104010010082	WUK/Magetic Pop Corn Caramel 48 gr/10 pcs x 6 ball/00	700	IDR	86781.60
21.	Mega Global Food Industry	0104020010045	WUK/Black Berry 150 gr (15 gr x 10 pcs) 12 Showbox/00	600	IDR	89617.20
22.	Mega Global Food Industry	0104020010046	WUK/Black Choco 150 gr (15 gr x 10 pcs) 12 Showbox/00	600	IDR	89617.20
23.	Mega Global Food Industry	0104020010047	WUK/Black Milky 150 gr (15 gr x 10 pcs) 12 Showbox/00	600	IDR	89617.20
24.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040101010086	BK/Coconut Factive 200 gr/12 Pouch/00	1	IDR	71928.27
25.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040101010087	BK/Chocolate Factive 200 gr/12 Pouch/1 00	1	IDR	7260.30
26.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102010032	WUK/Magetic White Coffee 70 gr/50 pcs x 3 ball/00	1	IDR	44515.72
27.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102010035	WUK/Wafer Cheese 250 gr/6 buket/00	2	IDR	64731.20
28.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102010036	WUK/Wafer Chocolate 250 gr/6 buket/00	2	IDR	64731.20
29.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102010055	WUK/Black Berry 15 gr/10 Ball x 11 pieces/110 pcs/01	1	IDR	4648.50
30.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102010091	WSK/Nagorini Chocolate 150 gr (5 gr x 25 pcs) 112 Showbox/NDRGA/00	1	IDR	77938.02
31.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102020023	WSK/Magetic Straw Berry Jangut 120 gr/24 pcs/00	2	IDR	13983.41
32.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040102030033	WSK/Magetic Choco Banana 150 gr/12 buket/Export China/00	2	IDR	137858.53
33.	Meta Cpa Kneaf Nusantara-PT-Surabaya	0104020010045	WUK/Black Berry 150 gr (15 gr x 10 pcs) 12 Showbox/00	1	IDR	67213.33
34.	Meta Cpa Kneaf Nusantara-PT-Surabaya	0104020010046	WUK/Black Choco 150 gr (15 gr x 10 pcs) 12 Showbox/00	1	IDR	67213.33
35.	Meta Cpa Kneaf Nusantara-PT-Surabaya	0104020010047	WUK/Black Milky 150 gr (15 gr x 10 pcs) 12 Showbox/00	1	IDR	67213.33
36.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040501010010	BK/Soft Crackers Cheese 400 gr/6 buket/00	2	IDR	92530.63
37.	Meta Cpa Kneaf Nusantara-PT-Surabaya	01040501010011	BK/Soft Crackers Lemon 400 gr/6 buket/00	2	IDR	92530.63
38.	Subur-Bp-Gresik	0103120000003	Bs Drum Beel ukuran 200 kg	1	IDR	79545.46
39.	Subur-Bp-Gresik	0103120000006	Bs Plastik HD Beah	30	IDR	500.00
40.	Subur-Bp-Gresik	0103120000007	Bs Plastik Kering	50	IDR	1150.00
41.	Subur-Bp-Gresik	0103120000017	Bs Kemas	70	IDR	1500.00
42.	Subur-Bp-Gresik	0103120000021	Bs Sampah	490	IDR	525.00
43.	UD Ed Jiva (Dwi Ely Saputri)	0103120000013	Bs Karton Kola	800	IDR	2072.70

**Report Explanation:** This report displays a detailed list of each sales transaction, sorted or grouped by **Customer**.

#### Key Columns:

- **Product Code and Product Name:** Shows which products were purchased.

- **Qty:** The number of units purchased.
- **Gross:** The gross sales value.
- **Net:** The net sales value after discounts or other adjustments.

## Tips & Important Notes

- Use this report to analyze which products are most frequently purchased by a specific customer.
- This report is very useful for the **Sales team**, especially **Account Officers**, to review the activity and sales volume on the accounts they manage.
- Filtering by a **Selected** Customer is very useful for preparing data before a customer visit or business meeting.

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Revision #1

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