



Sales Reporting

Reporting Sales Data

Tungaloy has implemented a system where you can submit sales data in exchange for incentives.

The system can accept many types of files and many formats including Excel, comma delimited, tab delimited, and XML. The basic data required includes your cost of Tungaloy items sold, the zip code of the delivery, and the date of sale.

To begin, create a login. Have a sample copy of the sales report you will upload handy. You will find more information about sales reports later in this document. Register with the web site and a Tungaloy representative will configure your account.

The Tungaloy Sales Reporting system can be accessed at <http://www.tungaloyamerica.com/TSR/>

Registering with the site

Before you begin, have a sample copy of the electronic sales report you will be uploading handy. When you know the system already supports the report format you will be sending uploading a sample report is optional.

Click on the Register link from the main page. This page will collect all of the information necessary to create the login you will use.

Specify a user name. Everyone at your company that might upload a report can have their own login Id, so feel free to use something like your full name. Spaces are OK. The user name specified here will show up in later reports and informational screens. Your user name can be up to 250 characters long.

You can use anything for a password, it should be something easy for you to remember but hard for others to guess. Your password can be up to 120 characters long.

Enter your email address. A Tungaloy representative may need to contact you using this address. The system will use this address to send a confirmation of your registration. If later you forget your password the system will email a new password using this address. The email address can be up to 250 characters long.



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Enter a security question. This question will be presented to you if you perform a password recovery. This question must be answered using the exact answer you specify in the next box for the system to re-set your password. The question and answer you specify here is included in the confirmation email you receive once completing registration. The question can be 250 characters, the answer 120 characters long.

Enter your company name and your customer number. This information will be used by a Tungaloy representative identify and configure your login ID.

Browse to the sample report. As part of the configuration process the format of your sales data will be examined.

On completion of the process your login will not yet be active. Once a Tungaloy representative has configured your login and notified you your login is active and you can upload sales data.

Uploading Data

A Tungaloy representative will notify you once your login has been configured to accept sales data. Login to the site and click on the Upload Report link.

The system can accept sales data in many forms. Verify the selected integration matches the data you will upload. As you change selections, an image and a description of each integration are displayed. As part of configuring your login the default integration will be set based on the sample report submitted.

Click the Browse button to select the file to upload, then click the Submit Report button

Once the uploaded data is successfully processed the results report is displayed. This report displays the data as it was brought into the system. It can be compared with the data uploaded to verify proper processing.



Exporting Sales Reports

You export data from your invoicing system to upload. The required data generally contains the date of sale, the zip code of the ship-to destination, and the dollar value. The value of interest is your cost of the Tungaloy supplied items involved in the sale.

Some systems have the ability to design such a report built-in. Other systems rely on third party tools such as Crystal Reports. Microsoft Excel has functionality that a knowledgeable person can use to build reports if your software supports data access through ODBC.

You will need someone proficient with a reporting tool and knowledgeable about your accounting software and its underlying data structure to design the report.

The actual report design will depend on your system and how you use it. In general the report will extract the Zip Code of delivery, the extended cost of the sale, the actual ship date from both your sales lines table and your item vendors table where the vendor id identifies Tungaloy, the documents type is an invoice or a return, and the actual ship date was anytime during the previous calendar month. Make sure to subtract values for returns, and the documents you report on are not voided.

Using a query language use WHERE clause to filter the relevant data, in Crystal Reports use the Select Expert. Comparing your results to comparable data in your accounting system is never a bad idea. The sales you report to Tungaloy for a particular year ought to be in-line with your purchases, for example.

Various file types are acceptable including Excel, XML, and delimited text files. You might prefer Excel because it is easy to review and make adjustments to any out of the ordinary data.

Tungaloy's Sales Reporting system can and will sum up the values in a report that apply to the same zip code for any given month. If you upload data for a particular month and zip-code, then later in another report again upload data for the same month and zip-code, the later value will overwrite the previous.

Once Tungaloy has configured the system to accept your reports it is important to keep the report consistent. Various elements of the report are significant to the import process, such as if the first row contains column names, what columns contain data, and in the case of Excel, how the cells are formatted, and the name of the sheet containing the data.



Viewing Data

After logging in use the View Data link to run a report of data contained in Tungaloy's system about your sales. Tungaloy's system stores data by Zip Code and by Month.

The report will display sales value for each Month/Year broken down by zip code. The report can be printed or exported to a variety of formats. Make sure you allow pop up windows. The report contains a View History link next to each line. Use this to see a history of uploaded documents that modified this value.

Auditing Data

From the main page click on the Document History page to see a listing of all reports uploaded. Here it is possible to see the file that was uploaded, and also the results of the integration.