



# Process

# Documentation

*Department:*

Customer Support

*Last Updated:*

9/30/2025 11:43 AM

**NAME OF PROCESS**

## Generating the Analysis Group Revenue Recap Report

**Use Case / Objectives**

This report summarizes group revenue using the analysis group field from the equipment category/class file. Management can organize inventory into general categories (e.g., Air, Compaction, Scaffolding). The single-page report displays location-specific revenue, grouped by predefined analysis categories.

**Configuration, Training, and Reporting**

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

**Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.**

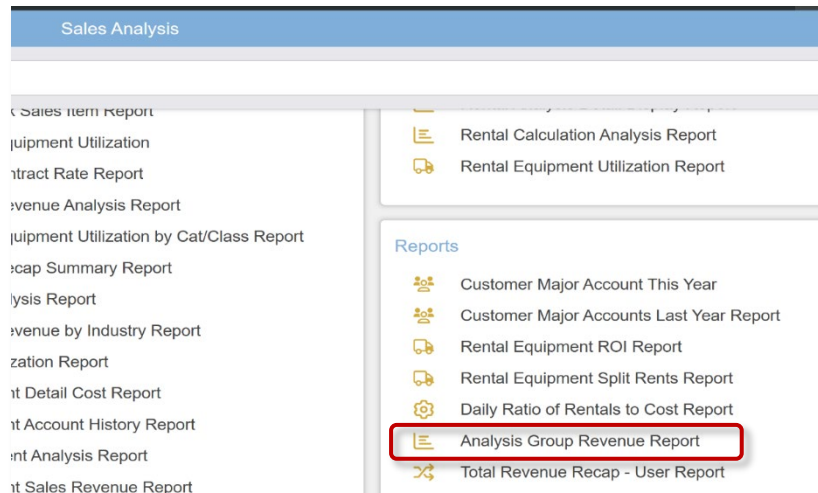
Menu options to access:

Sales Analysis => Reports => Analysis Group Revenue Report

# Generating the Analysis Group Revenue Recap Report

## Process Steps

1. Log into the [Roleplay Environment](#) using your credentials.
2. Select the **Sales Analysis** menu from the left toolbar.
3. In the **Reports** section, click on the **Analysis Group Revenue Report** option.



- a. The **Analysis Group Revenue Recap Report - Launch** screen opens.

9/29/25 10:05:58 Analysis Group Revenue Recap Report Sys: DEMO V12  
Cmp: RM Loc: DMO

From date: 9/01/25  
To date: 9/29/25  
Currency code: USD  
By loc or region: L (L=Loc, R=Region)

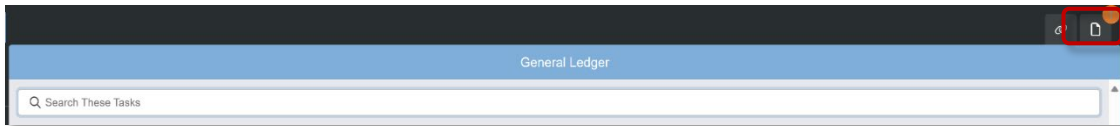
4. Type in the date range in the *From date* and *To date* fields for which you would like to generate the report.
5. Update the value in the *Currency code* field if necessary.
6. In the *By loc or region* field, type L = Location or R = Region.

7. The **Print Job** screen opens.



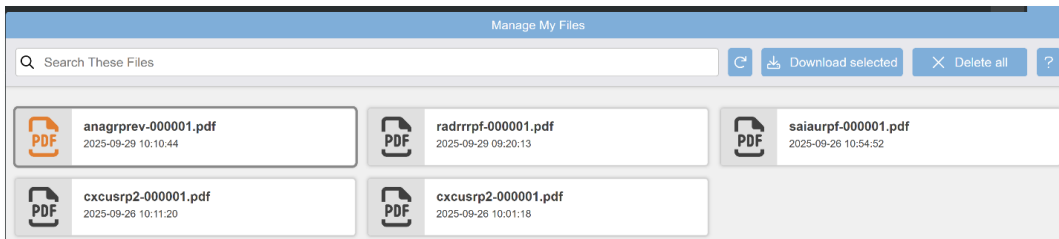
8. Press Enter to run the report.

- a. The **Submit Job** screen closes, and the **Sales Analysis** menu screen displays. .  
**NOTE:** The report is complete when the orange indicator displays by the **Manage My Files** icon.



9. Click the **Manage My Files** icon.

- a. The **Manage My Files** screen opens displaying your files.



10. Click the **Open** icon or double click on the desired file.



11. The **Analysis Group Revenue Report** opens, and the data will be displayed either by location or by region depending on the option entered on the **Analysis Group Revenue Recap Report - Launch** screen. **NOTE:** The screen shot below is a sample of the report.

9/29/25 10:10:41		Analysis Group Revenue Report							Cmpy: RM	
System: DEMO V12		By Location							Page: 1	
Currency Code: USD US DOLLAR		Report date range: 9/01/25 to 9/29/25								
ANALYSIS GROUP										
EARTHMOVING EQUIPMENT										
TOTAL -	78,372	BAT	BRAZ	BRM	DMO	77,372	EURO	EXE8	FTN	
		HHT	HOU	HTB	LGB	1,000	LSV	MAS	RAMI	
		RG3	TEST	TES2	0049					
ACCESSORY- EARTHMOVING										
TOTAL -	1,120	BAT	BRAZ	BRM	DMO	850	EURO	EXE8	FTN	
		HHT	HOU	HTB	270 LGB		LSV	MAS	RAMI	
		RG3	TEST	TES2	0049					
MATERIAL HANDLEING EQUIP										
TOTAL -	900	BAT	BRAZ	BRM	DMO	900	EURO	EXE8	FTN	
		HHT	HOU	HTB	LGB		LSV	MAS	RAMI	
		RG3	TEST	TES2	0049					
ACCESSORY- MATERIAL HAND										
TOTAL -	351	BAT	BRAZ	BRM	DMO	351	EURO	EXE8	FTN	
		HHT	HOU	HTB	LGB		LSV	MAS	RAMI	
		RG3	TEST	TES2	0049					
TRUCK EQUIP										
TOTAL -	13,890	BAT	BRAZ	BRM	DMO	13,890	EURO	EXE8	FTN	
		HHT	HOU	HTB	LGB		LSV	MAS	RAMI	
		RG3	TEST	TES2	0049					

## Reference Glossary

### Field Definitions for Tasks

#### Analysis Group Revenue Recap Report - Launch

- *From Date / To Date* - Allows the user to select the period of time for the report.
- *Currency Code* - Allows the user to select which currency (if multiple in company) to display the report.
- *By location or Region* - Displays a total for the company and then detail information for each L = location or R = Region.