



Member Sales Review

Overview


The Warehouse Management module Member Sales Review process provides the ability to view member sales records, suspend and unsuspend records, and create member sales reports. The Member Sales are from Issues, and must be marked Consumable, not Returnable.

Navigation

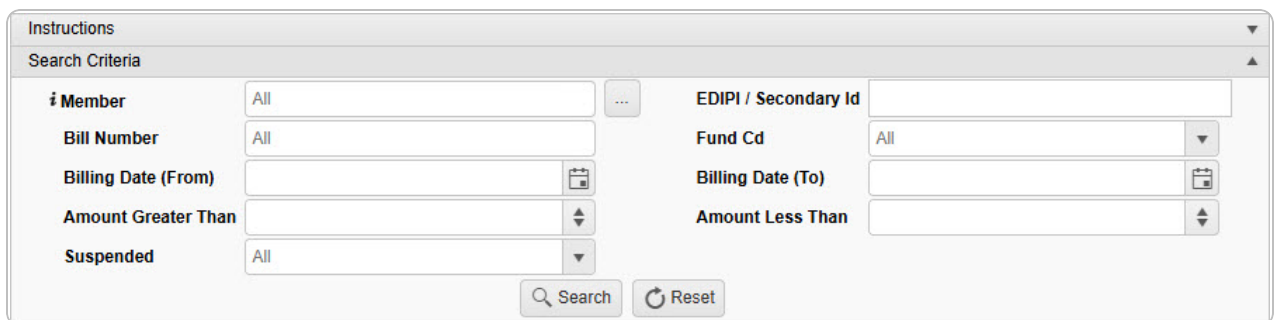
Material MGMT > Individual > Member Sales Review > Member Sales Review page

Procedures

Search for A Member Sales Review

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting  at any point of this procedure returns all fields to the default "All" setting.

1. In the Search Criteria box, narrow the results by entering one of the following optional fields.



Instructions

Search Criteria

Member: All

Bill Number: All

Billing Date (From):

Amount Greater Than:

Suspended: All

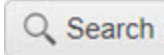
EDIPI / Secondary Id:

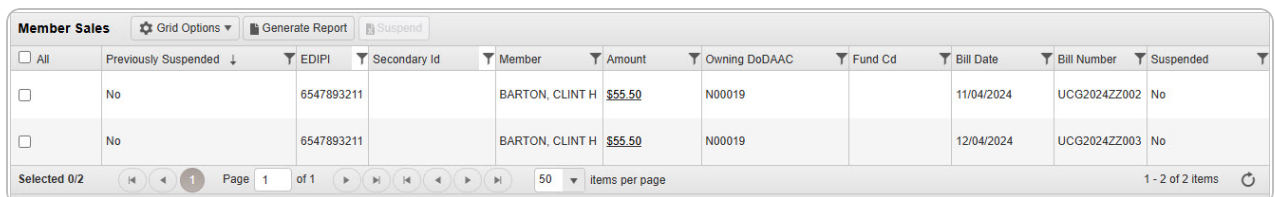
Fund Cd: All

Billing Date (To):

Amount Less Than:

Search Reset

2. Select . The results display in the Member Sales grid.



All	Previously Suspended	EDIPI	Secondary Id	Member	Amount	Owning DoDAAC	Fund Cd	Bill Date	Bill Number	Suspended
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		11/04/2024	UCG2024Z2002	No
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		12/04/2024	UCG2024Z2003	No

Selected 0/2 Page 1 of 1 50 items per page 1 - 2 of 2 items



View the Member Transactions

1. View the Member Sales Search Results.

Member Sales Grid Options Generate Report Suspend										
<input type="checkbox"/> All	Previously Suspended	EDIPI	Secondary Id	Member	Amount	Owning DoDAAC	Fund Cd	Bill Date	Bill Number	Suspended
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		11/04/2024	UCG2024ZZ002	No
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		12/04/2024	UCG2024ZZ003	No
Selected 0/2 Page 1 of 1 50 items per page 1 - 2 of 2 items										

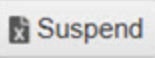
2. Click the Amount hyperlink. *The Member Transactions pop-up window appears.*

Member Transactions Grid Options										
Member: BARTON, CLINT H EDIPI: 6547893211										
Issue/Return Number	Issue/Return Date	ICN	Stock Number	Item Description	Serial Number	Quantity	Transaction Type	Amount	Owning DoDAAC	Fund Cd
UCG2024309000001	11/04/2024	B00000000000000280053	RTM123	TRUNKS MEDIUM		5	Charge	\$55.50	N00019	
Selected 0/1 Page 1 of 1 50 items per page 1 - 1 of 1 items										

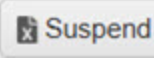
Suspend a Member Sales Record

1. View the Member Sales Search Results.

Member Sales Grid Options Generate Report Suspend										
<input type="checkbox"/> All	Previously Suspended	EDIPI	Secondary Id	Member	Amount	Owning DoDAAC	Fund Cd	Bill Date	Bill Number	Suspended
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		11/04/2024	UCG2024ZZ002	No
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		12/04/2024	UCG2024ZZ003	No
Selected 0/2 Page 1 of 1 50 items per page 1 - 2 of 2 items										

2. Click ☐ to select the desired record. *The record is highlighted, and  becomes available.*

Member Sales Grid Options Generate Report Suspend										
<input type="checkbox"/> All	Previously Suspended	EDIPI	Secondary Id	Member	Amount	Owning DoDAAC	Fund Cd	Bill Date	Bill Number	Suspended
<input checked="" type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		11/04/2024	UCG2024ZZ002	No
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		12/04/2024	UCG2024ZZ003	No
Selected 1/2 Page 1 of 1 50 items per page 1 - 2 of 2 items										

3. Select . *The row returns to normal, and the Suspended column changes from No to Yes.*





Help Reference Guide

Member Sales										
Grid Options Generate Report Suspend										
<input type="checkbox"/> All	Previously Suspended ↓	EDIPI	Secondary Id	Member	Amount	Owning DoDAAC	Fund Cd	Bill Date	Bill Number	Suspended
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		11/04/2024	UCG2024ZZ002	Yes
<input type="checkbox"/>	No	6547893211		BARTON, CLINT H	\$55.50	N00019		12/04/2024	UCG2024ZZ003	No
Selected 0/2 Page 1 of 1 50 items per page 1 - 2 of 2 items										

Create the Member Sales Financial Report

1. Select [Generate Report](#). The screen blinks as the report is created.
2. Hover over the [Report Manager](#) menu. The Report Manager menu appears.
3. Choose [View Reports](#). The View Reports tab appears.

View Reports										
Instructions Search Criteria Report Name: Member Sales Report Category: All Report Type: All Report Status: All Private/Shared: All Search Reset										
Scheduled Reports										
Download	Is Private	Rpt Format	Rpt Name	Rpt Category	File Size	Scheduled Dt	Entered Dt	Completed Dt	Established By	Rpt Status
LPWHR89	No	Excel	Member Sales	Metrics	5.3KB	12/04/2024 3:09:49 PM	12/04/2024 3:09:49 PM	12/04/2024 3:09:51 PM	MCCAULEYJC	Complete
1 - 1 of 1 items										

4. Select the LPWHR89 hyperlink. The Member Sales Report downloads.

	A	B	C	D	E	F	G	H	I
1	Member Sales Financial Report								
2	Member Sales								
3									
4	EDIPI	STUDENT ID	LAST NAME	FIRST NAME	MI	CHARGE	FUND	DATE	Bill Number
5	6547893211		BARTON	CLINT	H	\$ 55.50		12/4/2024	UCG2024ZZ003
6									
7									
8									

