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APPENDIX A: MANAGEMENT REPORTS REQUIRED BY THE BCP ORGANISATION

Management Report Name	Pages	Rows	Columns	Calculations
<i>Sales and Marketing</i>	<ol style="list-style-type: none"> 1. National (sum of 2. Below) 2. Per TCC region (depot) 	Product lines: <ul style="list-style-type: none"> • Major, intermediate and minor multiplied by quantities • Factory sales (manually captured) 	<ul style="list-style-type: none"> • Product description • Tonnage: <ul style="list-style-type: none"> • MTD and YTD for comparison years • Value: <ul style="list-style-type: none"> • MTD and YTD for comparison years (with Budget figures captured manually) • Realisation: <ul style="list-style-type: none"> • Comparison years and rand variance 	<ul style="list-style-type: none"> • Actual/Budget * 100 • Actual (this year) / Actual (previous year) * 100 • Actual rand value / actual tonnage * 100 (=Realisation) • Realisation (this year) – Realisation (previous year) (=Rand variance)
<i>Trade Marketing</i>	<ol style="list-style-type: none"> 1. National (sum of 2. Below) 2. Per region (Gauteng, Free State, Natal, Eastern Cape, Western Cape) 3. Twelve month trend figures per region (with regions as in 2.) 	Business review accounts Rest of Trade Factory	<ul style="list-style-type: none"> • Account For 1. and 2.: <ul style="list-style-type: none"> • MTD current and previous financial year • Growth (MTD) • YTD current and previous financial year • Growth (YTD) For 3.: <ul style="list-style-type: none"> • October to September with values month-ends completed • Total 	For 1. and 2.: <ul style="list-style-type: none"> • (MTD this year – MTD last year)/MTD last year (=Growth MTD) • (YTD this year – YTD last year)/YTD last year (=Growth YTD) For 3.: <ul style="list-style-type: none"> • Sum of October to September values (=Total)

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<p><i>Sales By</i></p>	<ol style="list-style-type: none"> 1. Account by region 2. Account by product by region 3. Account by region by product 	<p>Business review accounts (same accounts as in Trade Marketing)</p> <p>Account Total Rest of Trade Regional Total Factory Sales Grand Total</p>	<p>For 1.:</p> <ul style="list-style-type: none"> • Account • Region • YTD value (previous and current year) • Contribution % <ul style="list-style-type: none"> • Total contribution to SAM • YTD volume (current previous year) • Contribution % <ul style="list-style-type: none"> • Total contribution to SAM • Growth <p>For 2:</p> <ul style="list-style-type: none"> • Similar to 1. except for product (TCC stock no, description and pack description) 	<p>Growth calculation</p>
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Daily Sales	National	<ul style="list-style-type: none"> TCC regions (depots) Totals by region (Gauteng, Free State, Natal, Eastern Cape, Western Cape, Southern Transvaal, Northern Transvaal) Sub-total for TCC regions C/T factory and trading stock (captured manually) Total of TCC and factory figures 	Depot/region Daily: <ul style="list-style-type: none"> Value Mass Realisation (day) Month to Date: <ul style="list-style-type: none"> Value <ul style="list-style-type: none"> Actual Budget Pro Forma % Mass <ul style="list-style-type: none"> Actual Budget Pro Forma % Realisation month <ul style="list-style-type: none"> Actual Budget Year to Date: <ul style="list-style-type: none"> Same MTD above Trading stock mass <ul style="list-style-type: none"> MTD YTD 	Realisation (day) Pro forma %
Ranking (Top 30 customers)	<ol style="list-style-type: none"> National (month) National (YTD) Regional (month) Regional (YTD) 	Top 30 outlets sorted by descending value	<ul style="list-style-type: none"> Outlet number Outlet address (first line) Exclusive value Mass 	
Rebates (Tiger)	<ol style="list-style-type: none"> Month YTD Quarter 	<ul style="list-style-type: none"> By customer (group, division and region name) Total by group Other sales Grand total 	<ul style="list-style-type: none"> Group Division name Region name Total 	Sales and Marketing YTD figure for current financial year – the total of the sales captured = Other sales

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<p><i>Direct vs. Normal Sales</i></p>	<ol style="list-style-type: none"> 1. National 2. Spar by TCC region 	<p>Products to pack description level</p>	<ul style="list-style-type: none"> • TCC stock no • Description • Pack description • Directs: <ul style="list-style-type: none"> • Exclusive Value • Mass • Total Value % • Normal: <ul style="list-style-type: none"> • Exclusive Value • Mass • Total Value % • Total <ul style="list-style-type: none"> • Exclusive Value • Mass 	<ul style="list-style-type: none"> • Total Value %
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<p>Sales vs. Returns</p>	<ol style="list-style-type: none"> 1. Customer (major group) 2. Depot by customer (major) 3. Depot by value 4. Depot by mass 	<p>For 1:</p> <ul style="list-style-type: none"> • Major group description • Total <p>For 2:</p> <ul style="list-style-type: none"> • Major group description • Subtotal by depot • Total <p>For 3:</p> <ul style="list-style-type: none"> • Depot description • Subtotal by region • Total margarine <p>For 4:</p> <ul style="list-style-type: none"> • Depot description • Subtotal by region • Total margarine 	<p>For 1,2:</p> <ul style="list-style-type: none"> • Description • Delivery (DEL) • Price adjustment credit (PAC) • PAC % • Saleable return not associated with a delivery (SAR) • SAR % • Unsaleable credit (USC) • USC % • Total <p>For 3, 4:</p> <ul style="list-style-type: none"> • Description • Delivery (DEL) • Price adjustment credit (PAC) • PAC % • Number of PAC • Saleable return not associated with a delivery (SAR) • SAR % • Number of SAR • Unsaleable credit (USC) • USC % • Number of USC • Total • Total number of credit notes 	<ul style="list-style-type: none"> • PAC% • SAR% • USC% • Total no of credit notes
<p>Promotional Review <i>(based on ad-hoc sample provided)</i></p>	<p>Sales for region by store</p>	<ul style="list-style-type: none"> • Major group down to pack (Description (major group), inter group and description, outlet number and name, product line description and pack description) • Total per outlet 	<p>Previous financial year:</p> <ul style="list-style-type: none"> • Exclusive value • Mass <p>Current financial year:</p> <ul style="list-style-type: none"> • Exclusive value • Mass 	

<p>Profitability Reports <i>(Analysis of Variable Selling)</i></p>	<p>There are two reports with the same rows but different columns.</p>	<ul style="list-style-type: none"> • By product • By intergroup by product • By intergroup • By major group by product • By depot by product • By customer (combination of major, inter and minor groups) 	<p>For 1:</p> <ul style="list-style-type: none"> • Mass (kg) • Gross sales • Sales (R/ton) • Variable selling % • Net sales • Cost of sales (R) • Gross margin (R) • Gross margin (R/ton) • Gross margin % • Direct overhead • Indirect overhead <p>For 2:</p> <ul style="list-style-type: none"> • TCC commission • Merchandising • TCC selling • Quarterly SAM • Annual growth SAM • Quarterly Tiger • Annual growth Tiger • Coads • DC allowance • Settlement discount • Transport • Swell allowance • Total 	<p>For 1:</p> <ul style="list-style-type: none"> • $\text{Net Sales} = \text{Sales (R/ton)} * (100 - \text{VS}\%)/100$ • $\text{Gross Margin (R)} = \text{Net Sales} - \text{Cost of Sales}$ • $\text{Gross Margin (R/ton)} = \text{Gross Margin (R)}/\text{Mass(kg)} * 1000$ • $\text{Gross Margin \%} = \text{Gross Margin (R)}/\text{Gross Sales}$ • $\text{Net Margin} = \text{Gross Margin (R)} - \text{Direct Overhead} - \text{Indirect Overhead}$ <p>For 2:</p> <ul style="list-style-type: none"> • Total = all preceding column values
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APPENDIX B: LAYOUT OF FILES RECEIVED BY THE BCP ORGANISATION FROM THE THIRD PARTY DISTRIBUTOR (3PL)

Filename: STTRAN			
Column Name	Type	Range of Values	Used for
REGION	CHAR(2)	Valued values between 01 to 30	Indicates the 3PL depot. Renamed to 3PL region in the BCP's system.
OUTLET	CHAR(5)		3PL debtor's code at assigned at an outlet level.
PRODUCT	CHAR(9)		Only digits 5 to 9 contain values other than 0.
STORE	CHAR(1)	B = Bulk store C = Chilled D = Direct drops R = Returns store W = Frozen warehouse	Indicates location of goods in 3PL depots
TYPE	CHAR(1)	C = Credit Note D = Direct (CN/Invoice) I = Invoice R = Return (CN/Invoice)	Indicates type of transaction for which details are recorded.
QTY	NUMBER(7)	Positive integer	Quantity involved in transaction measured in cases (except for part returns which are rounded either up or down).
MASS	NUMBER(10) Decimal=3	Positive real number	Total mass of in kilograms.
SALE	NUMBER(10) Decimal=2	Positive real number	Sale value in Rands.
REASON	CHAR(2)	Assigned codes between 01-99	Codes used to indicate reasons for transactions
ROUTE	CHAR(3)	-	Transport route number for delivery.
TRAN_DATE	CHAR(6) YYMMDD	Valid date in required format	Transaction date.
GROSS	NUMBER(10) Decimal=2	-	Not used by The Cold Chain.
CLAIM	NUMBER(10) Decimal=2		Used in claim back report for 3PL commission. Could be used by the BCP organisation to calculate/estimate claim back amount at month end.
COST	NUMBER(10) Decimal=2		Cost of sales, i.e. price of goods from SA Margarine
DEAL	NUMBER(10) Decimal=2		Rand value of deal – empty if no deal exists and sale uses list price.
TAX	NUMBER(9) Decimal=2		Rand value of VAT charged.

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QTY_CHANGED	NUMBER(3)		Records changes to quantity for the transaction e.g. quantity ordered is more than the available stock.
MANU	CHAR(3)	-	Value is 220 for SA Margarine.
DOC_NO	CHAR(8)		Transaction document number e.g. invoice number, credit note number etc.
PRICE_REF	CHAR(16)		Reference captured by the person from BCP organisation capturing the price on 3PL system.
EXTRA_REF	CHAR(10)		Reference calculated by the system when pricing information is captured e.g. M220010937.
ORIG_OUTLET	CHAR(5)	-	Used for crediting purposes: link the GRV account and the debtors for payment of credit notes.
CUST_REF	CHAR(20)	Alphanumeric text	Used as comment field. Normally the order number is captured here.
DEPOT	CHAR(1)	B = Bloemfontein, C = Cape Town D = Durban E = East London G = George J = City Deep K = Klerksdorp L = Nelspruit N = Dundee O = Midrand P = Port Elizabeth T = Pietersburg W = Welkom	3PL depot which was responsible for the delivery.
COMMENT	CHAR(8)	Alphanumeric text	Comment field
COLLECT	CHAR(1)	Y = Yes N = No	Indicates collect customer.
PRICE_CHANGED	CHAR(1)	Y = Yes N = No	Indicates that there was an override on the price, normally on credit notes and trading stock.
CRED_RELEASE	CHAR(1)	Y = Yes N = No	Release suspended invoice
WEEK_NO	CHAR(2)	1 to 52	3PL week number based on 3PL financial year
USER	CHAR(5)	Valid user name	User who captured sales transaction.

Filename: GEOUTLMS			
Column Name	Type	Range of Values	Used for
REGION	CHAR(2)	Two digit positive integer combination referring to valid region	Number of 3PL depot which serves the outlet/customer.
OUTLET	CHAR(5)	Positive integer.	3PL debtor's code at assigned at an outlet level.
CUST_NAME	CHAR(30)	Alphanumeric text	Name of customer.
CUST_ADDRESS_1	CHAR(26)	Alphanumeric text	Line in customer address
CUST_ADDRESS_2	CHAR(26)	Alphanumeric text	Line in customer address
CUST_SHORTAD	CHAR(20)	Alphanumeric text	Shortened version of customer address
CUST_STATUS	CHAR(1)	A = Active D = Discontinued	Status of customer's/debtor's account with 3PL
CUST_TYPE	CHAR(1)	C = Catering I = Inter-group R = Retail W = Wholesale	Type of customer.
CUST_ICS	CHAR(1)	B = Barlows C = C.G. Smith I = ICS Group R = Region S = Staff	Indicates whether an outlet is a member of ICS. Not in use by 3PL
RECORD_STATUS	CHAR(1)	I = Inactive A = Active	
SUMMARY_TYPE	CHAR(1)	Blank S = Summary account	Used to indicate whether debtor belongs to a summary account for group accounting purposes.
SALES_MGR	CHAR(1)	-	3PL's sales manager.
AREA_MGR	CHAR(1)	-	3PL's area manager.
FILLER_1	CHAR(1)	-	Additional space provided should future addition of field to file be required.
REP_CODE	CHAR(2)	-	3PL's representative code
EAN13_CUST	CHAR(12)	-	Barcode supplied by customer – mostly not maintained.
SAM_SALESMAN	CHAR(2)	-	SA Margarine's salesperson responsible for sale. No longer captured by 3PL.
ROUTE	CHAR(3)	-	Route on which delivery is made by 3PL.
EXPORT	CHAR(1)	Y = Yes N = No	Indicates whether customer requires the exportation of goods.

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TAXZONE	CHAR(2)	01 = South Africa 02 = Swaziland	Indicates zone for tax purposes
COD	CHAR(1)	Y = Yes N = No	Indicates Cash on Delivery
REG_NO	CHAR(1)	-	If ICS customer, then a registration number would be recorded.
DATE_LAST_TRAN	CHAR(6) YYMMDD	Valid date for YYMMDD format	Date last transaction was recorded for the outlet/customer.
CUST_BRANCH	CHAR(6)	-	Not used at present. Available for future EDI/eCommerce applications
CONTROL_CODE	NUMBER(5)	-	No longer used.
CHANNEL	CHAR(3)	Valid values between 000 and 999	Used for grouping to do pricing. BCP organisation uses this a guideline when classifying their customers on their system.
SUB_CHANNEL	CHAR(3)	Valid values between 000 and 999	Used for grouping to do pricing. BCP organisation uses this a guideline when classifying their customers on their system.
CUST_GROUP	CHAR(2)	Valid values between 00 to 99	Used for customer grouping for reporting purposes. BCP organisation uses this a guideline when classifying their customers on their system.
CUST_DIV	CHAR(2)	Valid values between 00 to 99	Used for customer grouping for reporting purposes. BCP organisation uses this a guideline when classifying their customers on their system.
CUST_REGION	CHAR(2)	Valid values between 00 to 99	Used for customer grouping for reporting purposes. BCP organisation uses this a guideline when classifying their customers on their system.
DATE_LAST_UPDATED	CHAR(6) YYMMDD	Valid date for YYMMDD format	Date debtor's (of 3PL) information was last updated.

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Filename: GEPRODMS			
Column Name	Type	Range of Values	Used for
PRODUCT	CHAR(9)		Product number assigned by 3PL
DESC	CHAR(30)	Alphanumeric text	Description of product
SHORT_DESC	CHAR(15)	Alphanumeric text	Short description of product
PROD_STATUS	CHAR(1)	A = Active D= Discontinued	Status of product
RANDOM	CHAR(1)	Y = Yes N = No	Sold by random weight or not (not applicable in case of SA Margarine)
SOLD_BY_MASS	CHAR(1)	C = Cases M = Mass (kg)	
COMM_TYPE	CHAR(1)	-	Not used. Indicates whether commission is calculated using mass (kg) or a fixed percentage
COMMISSION	NUMBER(5) Decimal=2	-	Not used. Rate at which commission is received on a product
BUDG_GROUP	CHAR(2)	-	Allocation for 3PL budget purposes.
BUDG_TYPE	CHAR(2)	-	Allocation for 3PL budget purposes.
DATE_OPENED	CHAR(6) YYMMDD	Valid date for YYMMDD format	Date product was opened.
UNITS_PER_CRATE	NUMBER(3)	-	Not applicable to SA Margarine i.e. will always be equal to 1
MANU	CHAR(3)	-	Value is 220 for SA Margarine
STORAGE	CHAR(1)	2 = Chilled	
PROD_GROUP	CHAR(2)		
PACK_TYPE	CHAR(2)		
PROD_TYPE	CHAR(2)		
EAN13_CODE	NUMBER(12)	-	Barcode supplied by customer – mostly not maintained.
ITF14_PREFIX	CHAR(1)	-	Check digit for EAN13_CODE.
CARTON_MASS	NUMBER(5) Decimal=3		Physical weight of packaging used in kilograms
LINK_PRODUCT	CHAR(9)	Valid product number with a 9 prefixed	If the field contains values, it indicates that there is trading stock on this product. <i>Originally used to indicate substitute product if</i>

			Originally used to indicate substitute product if enough stock was not on hand.
DATE_LAST_USED	CHAR(6) YYMMDD	Valid date for YYMMDD format	Date of last sale.
PACK_QTY	NUMBER(3)		Number of products in case e.g. 30 (500g)
PACK_MASS	NUMBER(5) Decimal=3		Mass in kilograms e.g. 15.000
TAX_LEVEL	CHAR(1)	0 = Non-taxable 1 = Taxable	Indicates whether product is taxable or not
REGION_* (*=1-30)		Valid value between 01 to 30	Indicates 3PL depot(s) from where product is sold
MAX_DISCOUNT	NUMBER(3)	0-100	SA Margarine supplies this percentage as the maximum discount that can be given to customers by 3PL. Used in pricing.
LIST_PRICE	NUMBER(8) Decimal=2	Positive real number	Normal selling price if there is no existing deal which overrides this value

Filename: GESTOCKS			
Column Name	Type	Range of Values	Used for
BRANCH	CHAR(1)	B = Bloemfontein C = Cape Town D = Durban E = East London G = George J = City Deep K = Klerksdorp L = Nelspruit N = Dundee O = Midrand P = Port Elizabeth T = Pietersburg W = Welkom	Indicates the 3PL depot (branch) where stock is held.
WAREHOUSE	CHAR(1)	W = Warehouse	Indicates warehouse of 3PL (as opposed to direct drop in BCP organisation's system, indicated by B)
PRODUCT	NUMBER(5)	Any product number contained in the product master file	3PL product number
ALLOC	NUMBER(6)	Zero or positive integer	Number of cases allocated to customer(s) but not yet delivered
QTY	NUMBER(6)	Zero or positive integer	Number of cases on hand (including allocated) i.e. free stock = QTY - ALLOC

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Filename: GECHANMS			
Column Name	Type	Range of Values	Used for
CHANNEL	CHAR(3)	Valid values between 000 and 999	Used for grouping to do pricing.
SUB_CHANNEL	CHAR(3)	Valid values between 000 and 999	Used for grouping to do pricing.
DESC	CHAR(30)	Alphanumeric text	Description of channel.
SHORT_DESC	CHAR(15)	Alphanumeric text	Description of channel.
EAN13_CUST	NUMBER(12)	-	Barcode supplied by customer – mostly not maintained.
REPORTING	CHAR(1)	Y = Yes N = No	Indicates if channel is active (Y) or not (N). Used for report listings.
INCL_VAT	CHAR(1)	I = Inclusive E = Exclusive	Indicates whether VAT is included.
OPEN_CYCLE	CHAR(1)	Y = Yes N = No	Not used by 3PL
FILLER__1	CHAR(1)	-	Additional space provided should future addition of field to file be required.
REGION_* (* = 1 TO 30)	CHAR(2)	01 to 30	3PL depot numbers

Filename: GECRPMS			
Column Name	Type	Range of Values	Used for
CUST_GROUP	CHAR(2)		Customer grouping.
CUST_DIV	CHAR(2)		Customer grouping.
CUST_REGION	CHAR(2)		Customer grouping.
DESC	CHAR(30)		Description of customer grouping.
SHORT_DESC	CHAR(15)		Shortened description of customer grouping.
REPORTING	CHAR(1)	Y = Yes N = No	
RECORD_STATUS	CHAR(1)	A = Active I = Inactive	
GROUP_TYPE	CHAR(1)	A = Agency C = Catering I = Inter-group R = Retail W = Wholesalers	
CHANNEL	CHAR(3)	Valid values between 000 and 999	Used for grouping to do pricing.
SUB_CHANNEL	CHAR(3)	Valid values between 000 and 999	Used for grouping to do pricing.