

Key Sales Reports to Keep Your Business Running



Overview

Key Sales Reports in RFMS allows analysis and forecasting by a number of criteria including store location, salesperson, customer type, and product line. Most successful businesses look at these “metrics” weekly and monthly. Some of the key reports include: current and projected job profitability, sales performance, merchandising and marketing ROI.

The ability to accurately report sales allows the business to make critical decisions. Up to date information including current profitability on jobs helps owners know if they are on track before the full financial report is available. Forecasting what jobs are due to be closed for the month also gives management key benchmarks.

Measuring sales performance beyond the volume of sales is critical in today’s fast paced market. A combination of close ratios, profitability and volume will reveal which salesperson is the most effective.

The sales reporting process can be greatly enhanced with the use of the Sales Budgeting feature. This feature allows you to project targets for each salesperson based on their previous year’s performance.

Merchandising can be tough without statistics that show what is selling. For example, the most profitable products are rarely the highest volume in quantity sellers, so how can you get the right combination? The Top Sellers Report will help ensure the showroom displays what matches the company’s profit strategy.

Other statistics relate to marketing efforts and demographics to track the type of customers and return on investment a campaign is bringing in.

Key Features

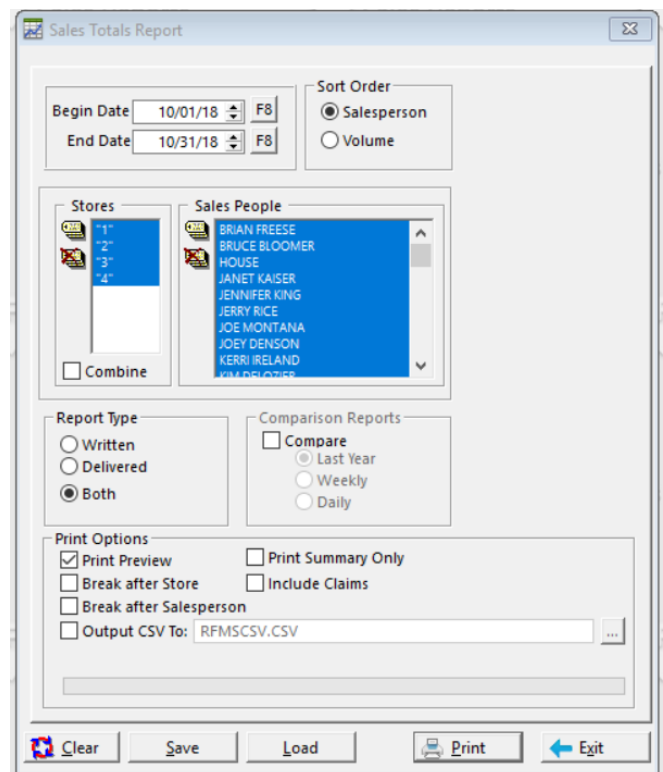
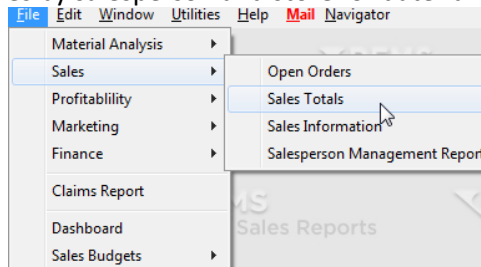
- Report by store location, salesperson, customer type, and product line
- Compare sales to prior periods
- Analyze Profit Margins by order and product
- Location of greatest sales activity for marketing purposes
- Sales budgeting for future business

Reports

- Sales Totals
- Job Cost Analysis
- Demographics
- Top Sellers
- Materials Analysis
- Sales Budgets

Sales Totals Report

Reports sales by salesperson and store for date range specified



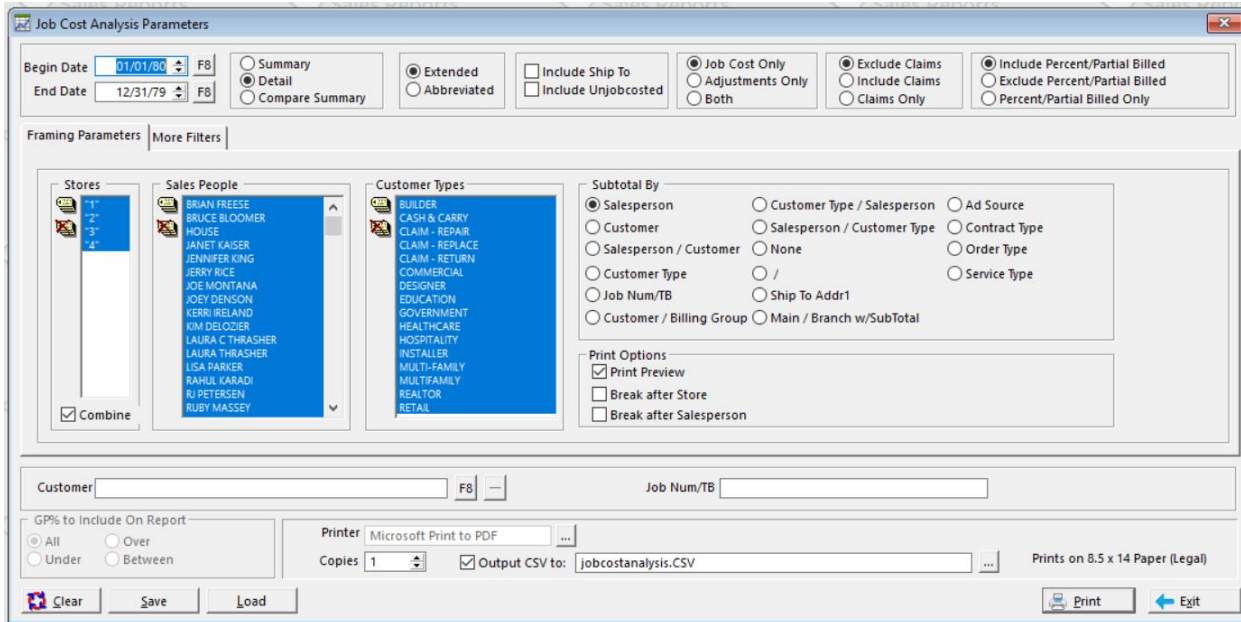
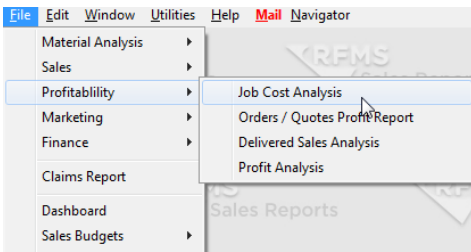
- Print for written or delivered sales (or both)
- Compare to last year's performance during the same time period
- Print to provide to each store/salesperson

Best Practice-

Get orders entered into RFMS as soon as approved for delivery or installation. This will assist in providing more accurate comparisons

Job Cost Analysis

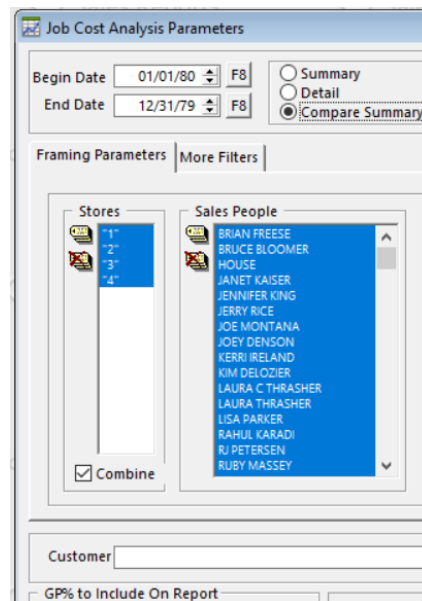
Reports only delivered (Job costed) jobs



- Print Comparison Summary for each salesperson for date range specified
- Specify Gross Profit % to target for comparison

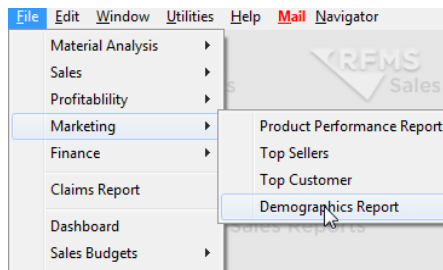
Best Practice –

Job cost each order in a timely manner. Upon delivery or installation of each order, verify that the order is job costed



Demographics Report

Reports sales by Job Type and Zip Code



- Specify Sold To or Ship To Zip Code
- Print for Written or Delivered Sales for period specified
- Rank calculations by various criteria
 - # of Sales
 - Invoice Total
 - % of Job Type
 - Zip Code

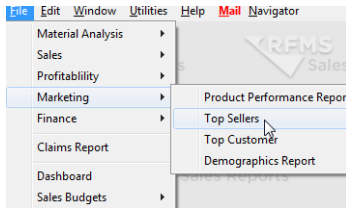
A screenshot of the 'Demographic Report OWNER'S CONFERENCE 2017' dialog box. The dialog has several sections: 'Zip To Use' with radio buttons for 'Sold To' (selected) and 'Ship To'; 'Order Status' with radio buttons for 'Written' and 'Delivered' (selected); 'Dates' with 'Begin Date' (01/01/80) and 'End Date' (12/31/79); 'Stores' with a list of store numbers (1-4) and a 'Combine' checkbox; 'Customer Types' with a list including BUILDER, CASH & CARRY, CLAIM - REPAIR, CLAIM - REPLACE, CLAIM - RETURN, COMMERCIAL, DESIGNER, EDUCATION, GOVERNMENT, and HEALTHCARE; 'Sub Sort By' with radio buttons for '# of Sales', 'Invoice Total', '% of Customer Type', and 'Zip Code' (selected); and 'Print Options' with checkboxes for 'Print Preview' and 'Break after Customer Type', and a field for 'Output CSV To' (RFMSCSV.CSV). 'Print' and 'Exit' buttons are at the bottom right.

Best Practice-

Verify that all orders have obtained a zip code prior to being entered into RFMS. This can be enforced with the use of the RFMS system options.

Top Sellers

Reports top selling products for period specified



The screenshot shows the 'Top Sellers Report - Prints On 8.5 x 14 Paper (Legal)' window. It contains several sections for configuring the report:

- Top Seller By:** Radio buttons for Style/Item and Color (selected), Style/Item, Manufacturer, Supplier, Private Supplier, Product Code, and Collection. Private Collection is disabled.
- Ranking:** Radio buttons for Quantity (selected), Gross Sale, and Gross Profit Percent.
- Date Ranges:** Radio buttons for Use Invoice Date (selected) and Use Delivery Date. Date From: 10/01/18, Date To: 10/31/18. Both have 'F8' buttons.
- Parameters:** Number of Top Sellers: 50, Unit Cost From: 0.00, Unit Cost To: 1,000,000.00.
- Options:** Checkboxes for Include Uncut Lines and Group by Salesperson.
- Filters:** Text boxes for Supplier, Manufacturer, and Customer, each with an 'F8' button.
- Stores:** A list of stores (1", 2", 3", 4") with a 'Combine' checkbox checked.
- PC (Product Code):** A list with columns PC and Description. Items include 01 CARPET, 02 VINYL, 03 CARPET PAD, 04 WOOD, 05 TILE, 06 LAMINATES, 07 LUXURY VINYL TILE, 08 CARPET TILES, 09 SUNDRIES/SUPPLIES.
- Sales People:** A list of salespeople including BRIAN FREESE, BRUCE BLOOMER, HOUSE, JANET KAISER, JENNIFER KING, JERRY RICE, JOE MONTANA, JOEY DENSON, KERRI IRELAND, KIM DELOZIER, and LAMBA C THURASHER.
- Customer Types:** A list of customer types including BUILDER, CASH & CARRY, CLAIM - REPAIR, CLAIM - REPLACE, CLAIM - RETURN, COMMERCIAL, DESIGNER, EDUCATION, GOVERNMENT, HEALTHCARE, and HOSPITALITY.
- Print Options:** Checkboxes for Print Preview and Output CSV To: RFMSCSV.CSV. A printer selection dropdown is set to 'Microsoft Print to PDF' and Print Copies is set to 1.

Buttons for 'Print' and 'Exit' are located at the bottom right.

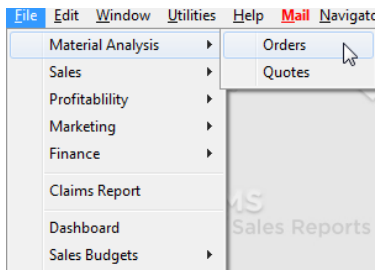
- Rank by Quantity, Gross Sale, or Gross Profit %
- Establish the number of top sellers to report on
- Select products codes, salespeople, or customer type to report on

Best Practice-

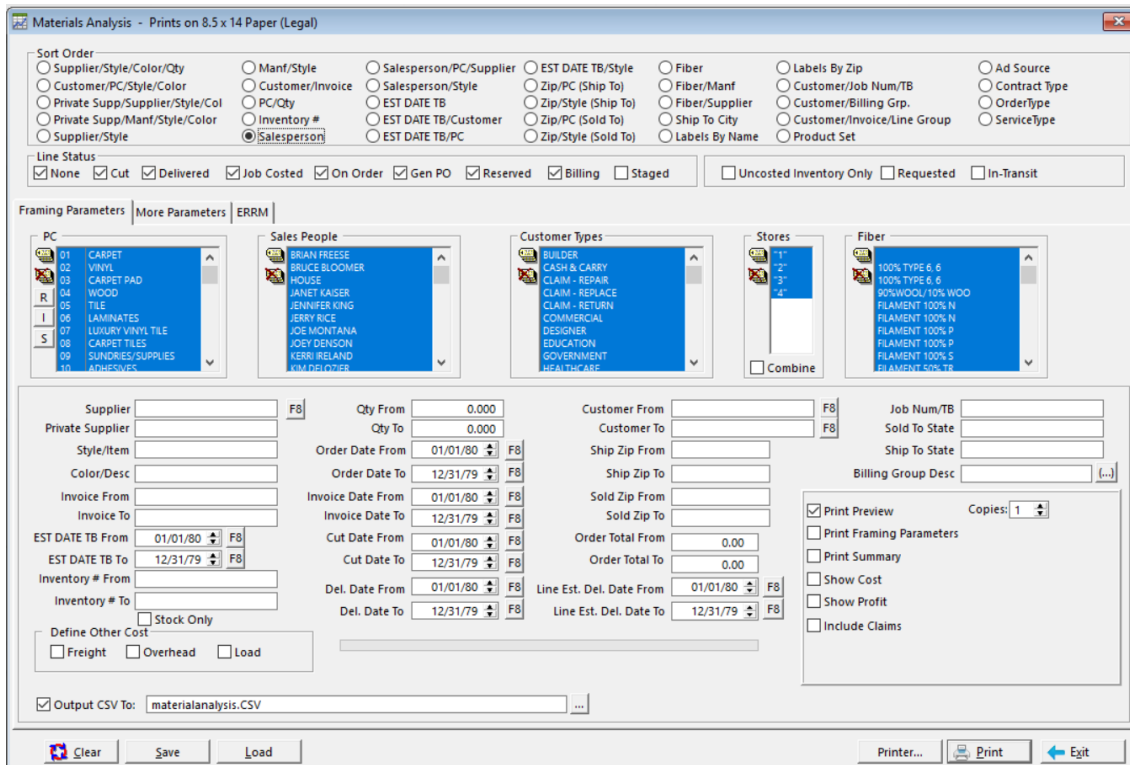
Verify that all products and services are entered into the RFMS Products module. This enforces consistency with how the product/service appears on each order being reported on

Material Analysis

Reports the line detail for each quote or order listed in time period specified



○ Various Sort Criteria



○ Establish what “status” to report on

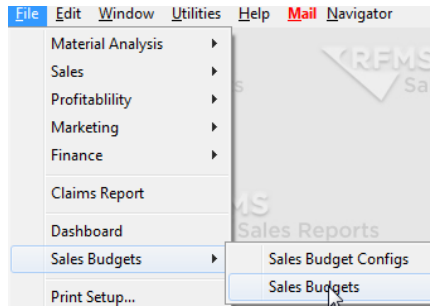
- None
- Cut
- Delivered
- Job Costed
- On Order
- Gen PO
- Reserved
- Billing
- Staged

○ Closely define information to be reported within date range(s) specified

Best Practice-Verify that each line contained on an order goes through the appropriate statuses before being job-costed. More accurate tracking can be performed with the use of this report.

Sales Budgets

Reports sales figures in comparison to the same period last year



- Requires initial setup
- Ability to increase previous year's sales numbers by specific percentage for budget creation

A dialog box titled 'Record Will Be Added'. It contains the following fields and options:

- Copy From: NONE
- Description: 2018
- Start Date: 01/01/18, F8
- Include Customer Types
- Import Information From Last Year
- Change Imported Amount
- By: 5.0%

A dialog box titled 'Record Will Be Changed'. It contains the following fields and options:

- Salesperson: BRIAN FREESE
- Customer Type: [empty]
- Amount: 70,082
- Dist. As: Ad Hoc, Equal Amts., Percents
- Monthly breakdown:
 - Jan. 2018: 0, Feb. 2018: 0, Mar. 2018: 34,669, Apr. 2018: 35,420, May 2018: 0, June 2018: 0
 - July 2018: 0, Aug. 2018: 0, Sept. 2018: 0, Oct. 2018: 0, Nov. 2018: 0, Dec. 2018: 0
- Amount Left: 0

Reports by Salesperson and Customer Type

A screenshot of the 'Sales Budget' report. The report shows a table with columns for Salesperson, Customer Type, and months from Jan. 2018 to Sept. 2018. The data is as follows:

Salesperson	Customer Type	Jan. 2018	Feb. 2018	Mar. 2018	Apr. 2018	May 2018	June 2018	July 2018	Aug. 2018	Sept. 2018
BRIAN FREESE		0	0	34,669	35,420	0	0	0	0	0
BRUCE BLOOMER		0	22,731	23,225	0	0	0	0	0	0
HOUSE		0	0	0	0	0	0	0	0	0
JANET KAISER		0	0	19,929	19,848	1,343	0	0	0	0
JENNIFER KING		0	0	0	0	0	0	0	0	0
JERRY RICE		0	3,638	56,911	12,715	0	0	0	0	0
JOE MONTANA		0	0	1,332	6,009	1,332	0	0	0	0
JOEY DENSON		0	0	0	0	0	0	0	0	0
KERRI IRELAND		0	0	0	0	0	0	0	0	0
KIM DELOZIER		0	0	0	0	0	0	0	0	0

- Ability to EDIT individual records

Best Practice-

Enter all sales orders into RFMS in a timely manner and into the correct time period. This helps to ensure more accurate comparisons

System Option Settings

- Allow Unreferenced Lines-OFF (System Options-Global or Assigned)
- Require Zip Code (System Options-User or Assigned)

Excel Features

- CSV-EXCEL
- Filters on Columns- Materials Analysis
- Sub Totals-Materials Analysis
- Graphs-Top Sellers (Bar)- Demographics (Pie)
- Pivot Tables

Sub Totals on Materials Analysis- Total Cost and Line Total by STATUS

A	B	D	F	G	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
Store	Customer	Invoice	Line Status	PC	Style/Item	Color/Desc	OrderDate	DelDate	Width	Length	Qty	UnitCost	TotalCost	UnitPrice	LineTotal	Profit	Profit%	Supplier
1	COSTEN, TRIPP	51209	Cut	4	PAD-REBOND				0	0	21.3	0.128	2.73	1.68	35.8	33.07	92.37	CARPENTER
1	ADVANTAGE REALTY	72302	Cut	4	PAD - REBOND				0	0	600	0.14	84	0.28	168	84	50	CARPENTER
1	TAYLOR, MATT	111709	Cut	4	1/2 REBOND PAD				0	0	100	1.89	189	0.04	3.78	-185.22	-4900	CARPENTER
1	BARTON CONSTRUCTIO	TEST022	Cut	4	PAD - REBOND				0	0	133	1.29	172	0	0	-172	0	INV COSTIN
1	BARTON CONSTRUCTIO	TEST022	Cut	4	PAD - REBOND				0	0	100	1.29	129	0	0	-129	0	INV COSTIN
1	JOHNSON, ASHLEY	TEST0518	Cut	4	PAD - REBOND				0	0	97	0.14	13.58	3	291	277.42	95.33	CARPENTER
1	LAST NAME, FIRST NAM	91212	Cut	5	NORTHSHORE PLANK 3" X				0.25	0	500	3.15	1575	6	3000	1425	47.5	TRI WEST
1	OSORIO, ARA	92608	Cut	5	NORTHSHORE PLANK (3")				0.25	0	800	3.05	2440	4.43	3544	1104	31.15	TRI WEST
1	LETTERMAN, DAVID	110403	Cut	5	NORTHSHORE-REDUCER				0	0	2	14.5	29	22.31	44.62	15.62	35.01	TRI WEST
1	CLAY CONSTRUCTION	ER081508	Cut	5	NORTHSHORE-THRESHOLD				0	0	2	10	20	64.36	128.72	108.72	84.46	TRI WEST
1	CLAY CONSTRUCTION	ER081508	Cut	5	NORTHSHORE PLANK (3")				0.25	0	100	3.05	305	6.2	620	315	50.81	TRI WEST
1	CLAY CONSTRUCTION	ER081508	Cut	5	NORTHSHORE-BASE+SHOE				0	0	10	1	10	36.86	368.6	358.6	97.29	TRI WEST
1	CLAY CONSTRUCTION	ER081508	Cut	5	NORTHSHORE-REDUCER				0	0	1	1	1	29	29	28	96.55	TRI WEST
1	BARTON CONSTRUCTIO	ERRMINV#	Cut	5	NORTHSHORE 5" PLANK				0.417	0	100	3.15	315	2.8	280	-35	-12.5	TRI WEST
1	COMMUNITY SERVICES	OR000003	Cut	5	NORTHSHORE 3" PLANK				0	0	25	3.05	76.25	6.2	155	78.75	50.81	TRI WEST
1	LAST NAME, FIRST NAM	91212	Cut	5	NORTHSHORE PLANK 3" X				0.25	0	-500	3.15	-1575	6	-3000	-1425	47.5	TRI WEST
1	LAST NAME, FIRST NAM	91212	Cut	5	NORTHSHORE PLANK 3" X				0.25	0	-500	3.15	-1575	6	-3000	-1425	47.5	TRI WEST
1	BELL CONSTRUCTION, F	CG101434	Cut	6	POLARIS/8X10 FLR				0	0	1	1.81	1.81	3.9	3.9	2.09	53.59	DAL-TILE
1	BARTON CONSTRUCTIO	OR000039	Cut	6	BELLARIO/12X12 FL				0	0	206	3.35	690.1	0	0	-690.1	0	DAL-TILE
1	BOYD, BILLY	OR000041	Cut	7	STAPLES-BOSTITCH	1-1/2" HARDWOOD	20100327		0	0	2	61.5	123	5.25	10.5	-112.5	-1071	FLOORS, IN
1	BOYD, BILLY	OR000041	Cut	8	ADHESIVE-CONTACT	CONTACT CEMENT (GAL)	20100327		0	0	3	10.68	32.04	21.36	64.08	32.04	50	CARPET WH
1	BOYD, BILLY	OR000041	Cut	14	BRUSH	WHITE	20100327		0	0	1	1.59	1.59	0	0	-1.59	0	SHAW INDL
1	CAMP, BILLY	60602	Cut	20	PATTERNED WELD ROD	YELLOW GLAZE	20020606		0	0	1	19.85	19.85	42.78	42.78	22.93	53.6	FLORSTAR S
1	COSTEN, TRIPP	51209	Cut	21	TOUCH UP KIT	TOUCH UP KIT	20090512		0	0	1	20.74	20.74	41.99	41.99	21.25	50.61	TRI WEST

Sub totaled and collapsed...

1	2	3	A	B	D	F	G	I	J	K	L	M	N	O	P	Q	R	S
			Store	Customer	Invoice	Line Status	PC	Style/Item	Color/Desc	OrderDate	DelDate	Width	Length	Qty	UnitCost	TotalCost	UnitPrice	LineTotal
1																		
+	27							Cut Total								\$ 3,100.72		\$ 2,746.77
+	101							Del Total								\$ 136,979.05		\$ 307,696.27
+	181							GenPO Total								\$ 31,832.05		\$ 67,734.70
+	282							OnOrder Total								\$ 68,078.76		\$ 90,338.36
+	361							Resvd Total								\$ 89,235.20		\$ 182,724.67
-	362							Grand Total								\$ 329,225.78		\$ 651,240.77

Details for lines in a DELIVERED status can be shown by EXPANDING the view

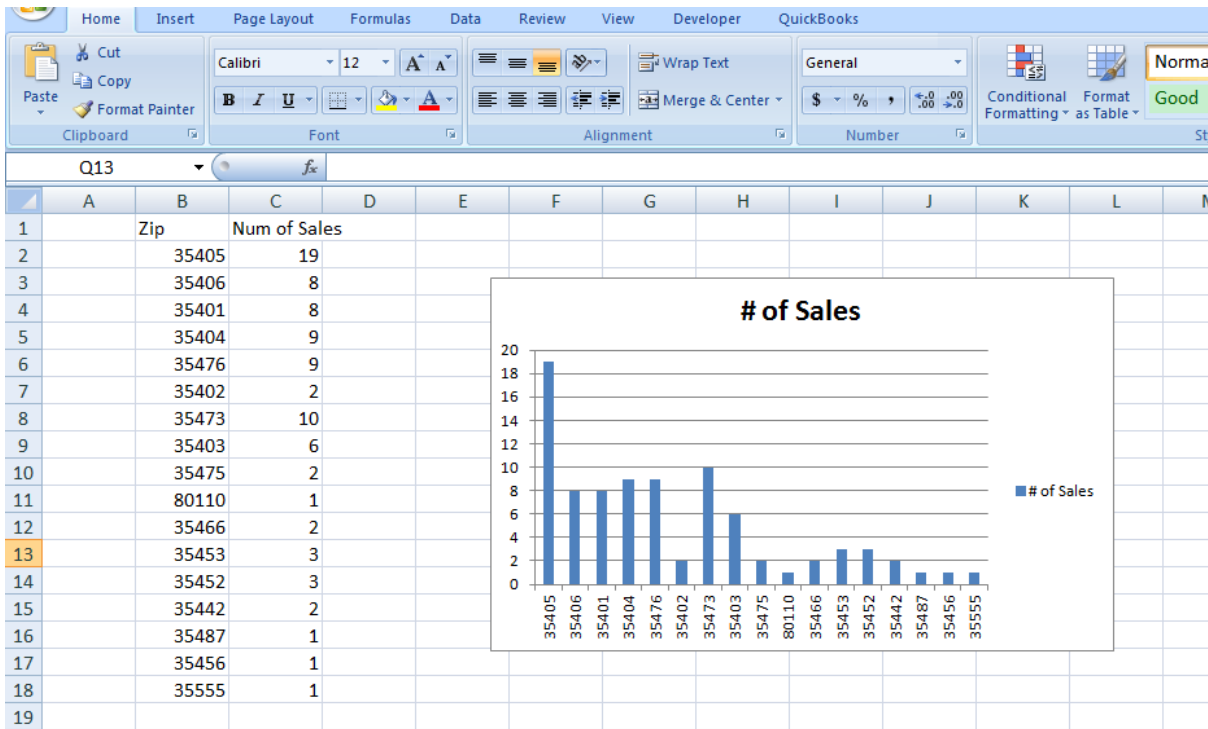
	A	B	D	F	G	I	J	K	L	M	N	O	P	Q
75	1	BARTON CONSTRUCTIO	CG600037	Del	6	BELLAGIO/12X1: BG02 GRIS	20060727			0	0	86.1	3.35	\$ 288.44
76	1	BARTON CONSTRUCTIO	CG600037	Del	6	POLARIS/6X8 FL GLOSS ALMO	20060727			0	0	178	1.54	\$ 273.41
77	1	BLACK, JOE	EXAMPLE	Del	6	SEMI GLOSS FI ALMOND	20130102			0.5	0.5	125	2.423	\$ 302.88
78	1	LAST NAME, FIRST NAM	FS000003	Del	6	GOLD RUSH FL CALIFORNIA	20110911			1	1	150	2.35	\$ 352.50
79	1	BARTON CONSTRUCTIO	TEST0213	Del	6	POLARIS/6X8 FL GLOSS ALMO	20070213			0	0	26.3	1.54	\$ 40.43
80	821	DREWRY CONSTRUCTIO	CG101462	Del	6	ALCHEMY 13X: WATER	20110315			1.083	1.0833	1503	0.65	\$ 976.64
81	1	COSTEN, TRIPP	51209	Del	8	BONA/DRIFAST S MOHAGONY	20090512			0	0	1	14.5	\$ 14.50
82	1	CRAWFORD, KEN	71410	Del	8	WOOD ADHESIV 3.5 GALLON	20100714			0	0	1	32.09	\$ 32.09
83	1	THOELE, LISA	80310	Del	8	WOOD ADHESIV 3.5 GALLON	20100803			0	0	5	32.09	\$ 160.45
84	1	PIERCE, RON	CG101461	Del	8	WOOD ADHESIV 3.5 GALLON	20110224			0	0	1	32.09	\$ 32.09
85	1	PULTE HOMES-AUTUM	R56666	Del	9	4" RUBBER CVE 1701 BLACK	20020610			0	0	120	0.34	\$ 40.80
86	1	BARTON CONSTRUCTIO	70406	Del	11	CORNERS-BURKE BROWN 4" V	20060707			0	0	1	0	\$ -
87	1	PULTE HOMES-PARK PR	O82008WC	Del	12	COUNTRY WOOI BUTTERNUT	20080820			0	0	12	125	\$ 1,500.00
88	1	PULTE HOMES-PARK PR	O82008WC	Del	12	COUNTRY WOOI BUTTERNUT	20080820			0	0	1	123	\$ 123.00
89	1	PULTE HOMES-PARK PR	O82008WC	Del	12	COUNTRY WOOI BUTTERNUT	20080820			0	0	1	123	\$ 123.00
90	1	PULTE HOMES-PARK PR	O82008WC	Del	12	COUNTRY WOOI BUTTERNUT	20080820			0	0	1	123	\$ 123.00
91	1	PULTE HOMES-PARK PR	O82008WC	Del	12	COUNTRY WOOI BUTTERNUT	20080820			0	0	1	123	\$ 123.00
92	1	ANDERSON MGMT. CO.	OR000032	Del	16	1/2" U/L PLYWO 4X8 SHEETS	20090827			0	0	32	0.32	\$ 10.24
93	1	ANDERSON MGMT. CO.	OR000033	Del	16	4" RUBBER BASE 110 BLACK	20090827			0	0	60	0.35	\$ 21.00
94	1	THOELE, LISA	80310	Del	21	TOUCH UP KIT UNFINISHED	20100803			0	0	1	20.74	\$ 20.74
95	1	CAMBRIDGE HOMES-C/	O20708W	Del	25	GROUT/STD SAN S159 LINEN	20080207			0	0	3	6.59	\$ 19.77
96	1	CRAWFORD, KEN	71410	Del	25	GROUT/STD SAN S161 PLUM	20100714			0	0	199	3.89	\$ 775.63
97	1	BARTON CONSTRUCTIO	CG600037	Del	25	GROUT/STD SAN S180 CRANE	20060727			0	0	5	3.89	\$ 19.45
98	1	BARTON CONSTRUCTIO	CG600037	Del	25	GROUT/STD UNS U228 SANDS	20060727			0	0	1	5.29	\$ 5.29
99	1	SCHMO, JOE	61609	Del	40	PLATINUM GRAN MASCARELLC	20090616			0	0	56	80.09	\$ 4,485.04
100	1	SCHMO, JOE	61609	Del	40	PLATINUM GRAN MASCARELLC	20090616			0	0	17.2	80.09	\$ 1,377.55
101				Del Total										\$ 136,979.05

Data Filter and Subtotal Feature for Material Analysis

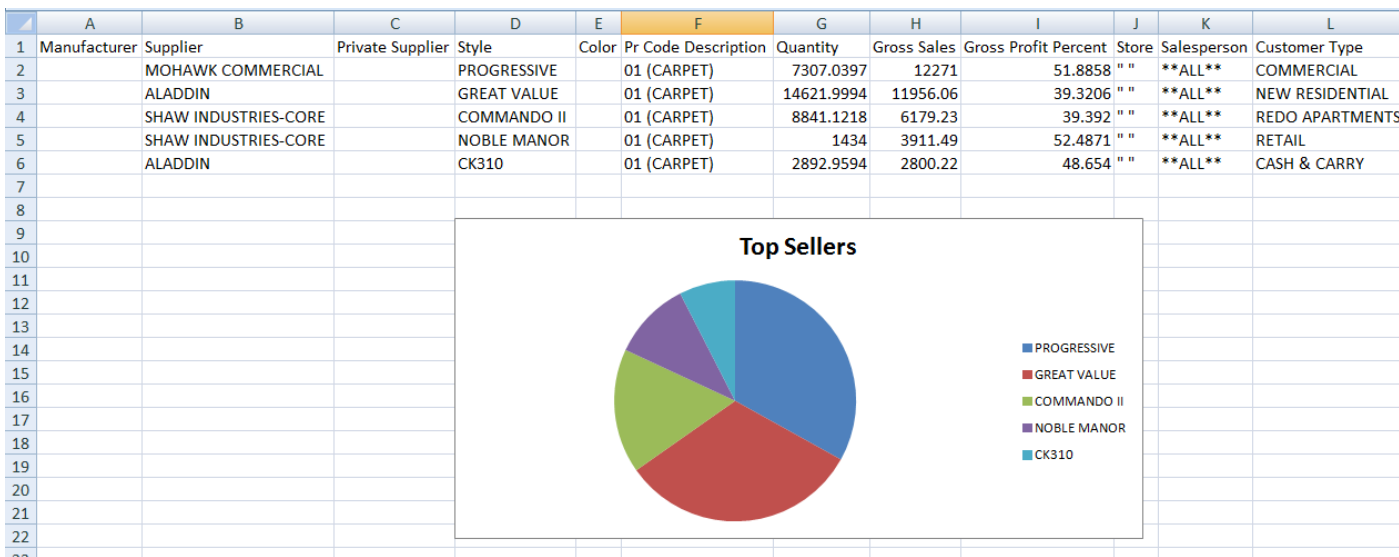
The screenshot displays the Microsoft Excel interface with the 'Data' ribbon active. The 'Filter' button is highlighted, and the 'Advanced' options are visible. The 'Data Tools' group shows the 'Subtotal' button. The spreadsheet below shows a list of customer orders with a 'Grand Total' row.

	A	B	C	D	E	F	G	H	I	J	K
1	Store	Customer	Tele1	Invoice	Line#	LineStatus	PC	Inventory#	Style/Item	Color/Desc	UnitPri
2	"	ADAMS, ANNA	758-5322	67327	6	JobC	1	SN448651	MEMORABLE	PASTRY CRUST	1.
3	"	ADAMS, ANNA	758-5322	67327	7	JobC	1	SPA08215	MEMORABLE	ENCHANTING WINE	1.
4	"	ADAMS, ANNA	758-5322	67327	8	JobC	1	SPF23363	MEMORABLE	NAVY SPLASH	1.
5	"	ADAMS, ANNA	758-5322	67327	10	JobC	1	SN406315	MEMORABLE	MIDNIGHT MOSS	1.
107	Grand Total										
108											
109											

Column Chart for Demographic Analysis



Pie Chart for Top Sellers



Pivot Table for Job Cost Analysis

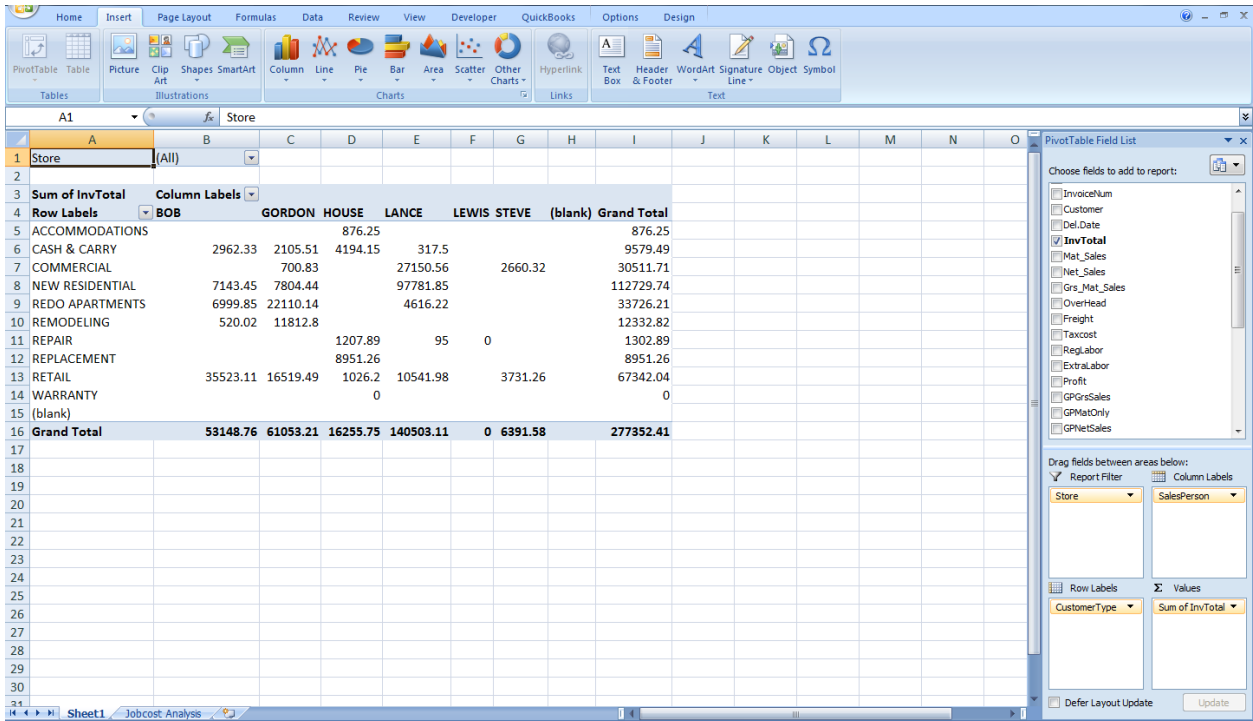


Figure 1-Overview

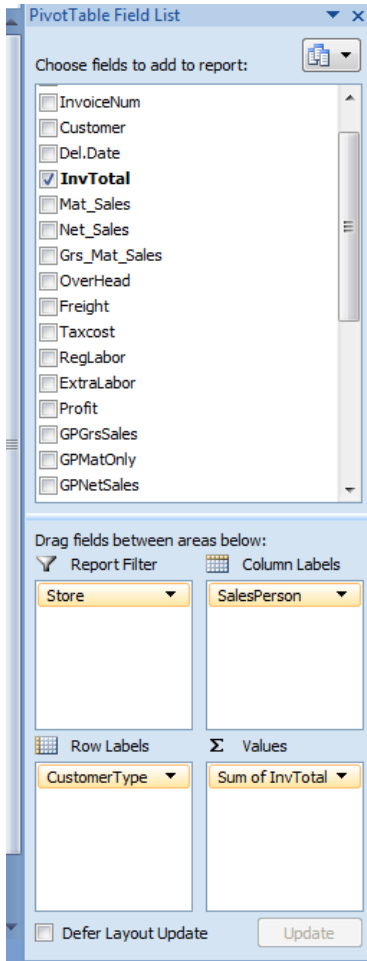


Figure 2-Pivot Table Field List

CustomerType	BOB	GORDON	HOUSE	LANCE	LEWIS	STEVE	(blank)	Grand Total
ACCOMMODATIONS			876.25					876.25
CASH & CARRY	2962.33	2105.51	4194.15	317.5				9579.49
COMMERCIAL		700.83		27150.56		2660.32		30511.71
NEW RESIDENTIAL	7143.45	7804.44		97781.85				112729.74
REDO APARTMENTS	6999.85	22110.14		4616.22				33726.21
REMODELING	520.02	11812.8						12332.82
REPAIR			1207.89	95	0			1302.89
REPLACEMENT			8951.26					8951.26
RETAIL	35523.11	16519.49	1026.2	10541.98		3731.26		67342.04
WARRANTY			0					0
(blank)								0
Grand Total	53148.76	61053.21	16255.75	140503.11	0	6391.58		277352.41

Figure 3-Results