

# Balance to Buy™ Pro Tip – Salesperson YTD Comparison Report

OBJECTIVE: Analyzing Salesperson performance on a year to date basis.

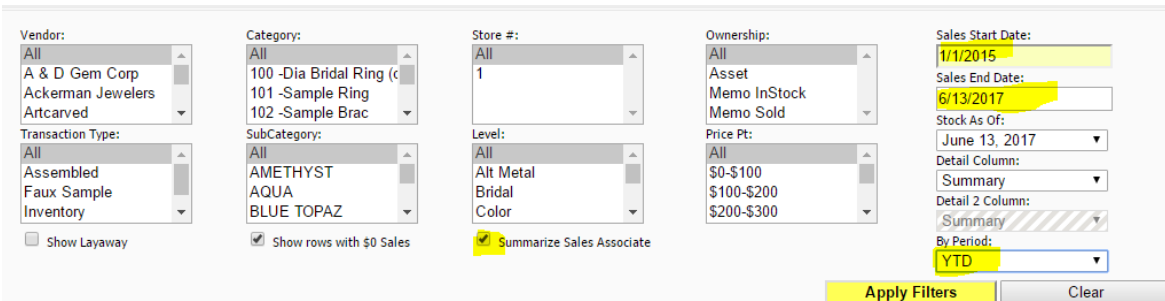
Solution: A **Year to Date, Period Report** for Salespeople. (Reminder: this type of report can be run for Vendors, Categories, Levels, etc.)

Step 1: Under the Summary-Detail Reports tab, select Sales Associate



Step 2: To compare the Year to Date performance for salespeople, change the Sales Start Date to 1/1/2015, leave the Sales End Date to the default date. (this will work for as far back as we have been receiving your data.)

Step 3: In the By Period box, select YTD. Keep the Summarize Sales Associate box checked and then Apply Filters



The report will now show each of your Sales Associates, compare their sales for the last 3 years on a Year to Date basis, units sold, average ticket, the gross profit and gross profit percentage.

		SALES		COST OF GOODS		INVENTORY		TURN	PROFIT			AGED				
Sales Associate	Period	Sales	Units	Avg Ticket	Cost	Avg Cost	Cost Onhand	Units	Avg Cost	OVER	GP\$	GP%	GMROI	Cost	Units	%Aged
Sales Associate #1	2017 YTD	\$519,118	335	\$1,548	\$265,722	\$792	\$0	0	\$0	0.00	\$253,396	0.49	\$0.00	\$0	0	0%
Sales Associate #1	2016 YTD	\$554,013	309	\$1,791	\$286,188	\$925	\$0	0	\$0	0.00	\$267,825	0.48	\$0.00	\$0	0	0%
Sales Associate #1	2015 YTD	\$710,095	424	\$1,677	\$357,969	\$845	\$0	0	\$0	0.00	\$352,126	0.50	\$0.00	\$0	0	0%
<b>Sales Associate #1</b>		<b>\$1,783,226</b>	<b>1,068</b>	<b>\$1,670</b>	<b>\$909,879</b>	<b>\$852</b>	<b>\$0</b>	<b>0</b>	<b>\$0</b>	<b>0.00</b>	<b>\$873,347</b>	<b>0.49</b>	<b>\$0.00</b>	<b>\$0</b>	<b>0</b>	<b>0%</b>
Sales Associate #2	2017 YTD	\$225,370	243	\$929	\$115,246	\$475	\$0	0	\$0	0.00	\$110,123	0.49	\$0.00	\$0	0	0%
Sales Associate #2	2016 YTD	\$168,003	199	\$844	\$81,360	\$409	\$0	0	\$0	0.00	\$86,643	0.52	\$0.00	\$0	0	0%
Sales Associate #2	2015 YTD	\$286,943	196	\$1,468	\$144,700	\$740	\$0	0	\$0	0.00	\$142,244	0.50	\$0.00	\$0	0	0%
<b>Sales Associate #2</b>		<b>\$680,316</b>	<b>638</b>	<b>\$1,066</b>	<b>\$341,306</b>	<b>\$535</b>	<b>\$0</b>	<b>0</b>	<b>\$0</b>	<b>0.00</b>	<b>\$339,010</b>	<b>0.50</b>	<b>\$0.00</b>	<b>\$0</b>	<b>0</b>	<b>0%</b>
Sales Associate #3	2017 YTD	\$184,623	183	\$1,007	\$93,062	\$508	\$0	0	\$0	0.00	\$91,560	0.50	\$0.00	\$0	0	0%
Sales Associate #3	2016 YTD	\$177,784	137	\$1,296	\$92,277	\$673	\$0	0	\$0	0.00	\$85,507	0.48	\$0.00	\$0	0	0%
Sales Associate #3	2015 YTD	\$187,212	231	\$810	\$92,153	\$399	\$0	0	\$0	0.00	\$95,059	0.51	\$0.00	\$0	0	0%
<b>Sales Associate #3</b>		<b>\$549,618</b>	<b>551</b>	<b>\$997</b>	<b>\$277,492</b>	<b>\$504</b>	<b>\$0</b>	<b>0</b>	<b>\$0</b>	<b>0.00</b>	<b>\$272,126</b>	<b>0.50</b>	<b>\$0.00</b>	<b>\$0</b>	<b>0</b>	<b>0%</b>