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

Summary-Detail Reports
Styles
Stores
Categories
Vendors
Price Points
Consultant Group
Levels
Customer
Customer Zip
Sales Associate
Customer Invoice
Sub Categories
Departments
Company

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

/endor:	Category:	Store #:	Ownership:	Sales Start Date:				
All	All	All	All	1/1/2015				
A & D Gem Corp	100 -Dia Bridal Ring (c	1	Asset	Sales End Date:				
Ackerman Jewelers	101 -Sample Ring		Memo InStock	6/13/2017				
Artcarved 👻	102 -Sample Brac 🔻	-	Memo Sold 🗸	Stock As Of:				
Fransaction Type:	SubCategory:	Level:	Price Pt:	June 13, 2017 V				
All	All	All	All	Detail Column:				
Assembled	AMETHYST	Alt Metal	\$0-\$100	Summary T				
Faux Sample	AQUA	Bridal	\$100-\$200	Detail 2 Column:				
Inventory 👻	BLUE TOPAZ 👻	Color 👻	\$200-\$300 -	Summary V				
Show Layaway	Show rows with \$0 Sales	Summarize Sales Associate		By Period:				
			Арр	y Filters Clear				

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.

BALANCE TO BUY™ Sales Associate Analysis Report for DemoNew Created 06/14/2017 Sales between 01/01/2015 and 06/13/2017 Categories: All, Vendors: All, Store Number: All, Level: All, TranType: All, Ownership: All																	
		S	ALES		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%
Sales Associate #1		\$1,783,22 6	<i>1,068</i>	\$1,670	<i>\$909,879</i>	\$852	\$0	0	\$0	0.00	<i>\$873,347</i>	0.49	<i>\$0.00</i>	\$0	0	0%	
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%
Sales Associate #2		\$680,316	638	\$1,066	\$341,306	<i>\$535</i>	\$0	0	<i>\$0</i>	0.00	\$339,010	0.50	\$0.00	<i>\$0</i>	0	0%	
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%
Sales Associate #3			\$549,618	551	<i>\$997</i>	\$277,492	\$ 504	\$0	0	<i>\$0</i>	0.00	\$272,12 6	0.50	<i>\$0.00</i>	\$0	0	0%

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