

# BALANCE TO BUY: SUGGESTED REPORTS

## OWNER REPORTS - SINGLE STORE

### WHY DO I NEED IT?

<b>Daily</b>	<b>Sales Report</b>	What categories are moving? Is there discounting? What is selling and needs to be re-ordered? (appear in RED)
	<b>Category Report Rolling 12 Months</b>	This report should make you start asking questions. Pay attention to Turn, Gross Profit% and aged.
	<b>Category by Price Point</b>	Shows your price point sweet spots by category and where you have holes in your inventory.
	<b>Vendor Report Rolling 12 Months</b>	Shows Vendors by retail sales. Pay attention to Turn, Gross Profit %, and aged.
<b>Monthly</b>	<b>Price Point Report</b>	Shows in what price points your customers are spending their money, and where you are investing your money. Also look at the GMROI here, for each \$ invested, how much are you earning in each price point?
	<b>Levels Rolling 12 Months</b>	Shows a higher level picture - How is your Bridal or Color Business doing?
	<b>Category Report 3 Year /YTD</b>	The By Period reports are where you will see trends in categories.
	<b>Vendor Report 3 Year /YTD</b>	The By Period reports are where you will see trends. How well is your vendor doing compared with prior years?

## OWNER REPORTS - MULTI STORE

### WHY DO I NEED IT?

<b>Daily</b>	<b>Sales Report</b>	What categories are moving? What discounting is going on? What is selling and needs to be re-ordered? (appear in RED)
	<b>Category by Store</b>	Shows by category how each store is doing - lets you compare performance.
<b>Monthly</b>	<b>Vendor by Store</b>	Shows by vendor how each store is doing - lets you compare performance.
	<b>Category by Price Point by Store</b>	Shows how each store is doing by category and price point - lets you compare performance.
	<b>Price Points by Store</b>	Shows how each Store is doing Points price add by points - lets you compare performance.
	<b>Levels by Store</b>	Shows by levels how each store is doing - lets you compare performance.

## MANAGER REPORTS

### WHY DO I NEED IT?

<b>Daily</b>	<b>Sales by Sales Person</b>	WHO is selling? WHAT is selling? WHO is discounting?
<b>Weekly</b>	<b>Sales by Sales Person Weekly</b>	Can you start spotting any trends? Who sells the most diamonds? Are they discounting appropriately?
	<b>Category by Salesperson</b>	Shows in each category how your salespeople compare to one another.
<b>Monthly</b>	<b>Levels by Salesperson</b>	This is a higher picture. Some people like to sell diamonds, some watches, you can also see how their profitability compares to each other in each level.
	<b>Levels Rolling 12 Months</b>	Gives manager good overview of how each level is performing.
	<b>Category Rolling 12 Months</b>	Gives manager good over of each category's performance.
	<b>Sales Associate 3 Year - YTD</b>	How are your sales people doing this year compared to prior years, YTD?
	<b>Levels 3 Year - YTD</b>	How are your levels doing this year compared to prior years, YTD?
	<b>Category 3 Year - YTD</b>	How are your categories doing this year compared to prior years, YTD?

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## MERCHANDISING/INVENTORY

## WHY DO I NEED IT?

<b>Daily</b>	<b>Sales Report by Vendor</b>	Shows what is selling by Vendor and allows you to know what to re-order.
	<b>Fast Seller Report by Vendor</b>	Shows what sold within 90 days and may need to be re ordered.
<b>Weekly</b>	<b>Sales by Vendor and Vendor Style</b>	Shows what is selling, maybe outside of the 90 days and may need to be re-ordered.
	<b>Styles Report/Key Vendors/by Quantity Sold</b>	Shows what styles are selling for key vendors.
	<b>Sales Report</b>	What categories are moving? What discounting is going on? What is selling and needs to be re-ordered? (appear in RED)
	<b>Category by PP</b>	Shows your price point sweet spots by category and where you have holes in your inventory.
	<b>Category MTD</b>	Shows how your categories are doing compared to same month last year.
	<b>Vendor MTD</b>	Shows how your vendors are doing compared to same month last year.
<b>Monthly</b>	<b>Vendor by Category/Price Point</b>	Shows what categories your vendor sells in and what you have in their price points.
	<b>Category YTD</b>	Shows how your categories are doing compared to previous years, YTD.
	<b>Vendor YTD</b>	Shows how your vendors are doing compared to previous years, YTD.
	<b>Aged Report for Asset by Days in Stock</b>	Shows what you have in aged merchandise in the store for the time you select.
	<b>Vendor Version Reports for Vendors</b>	Reports that you set up to send to your vendor when they want to know what sold in your store. There is no profit or exact retail information for Vendor Version reports.
<b>Multi Stores</b>	<b>Category by PP by Store</b>	Shows how each store is doing by category and price point - lets you compare performance and see where you may need to stock-balance between locations.