

Sales Reports

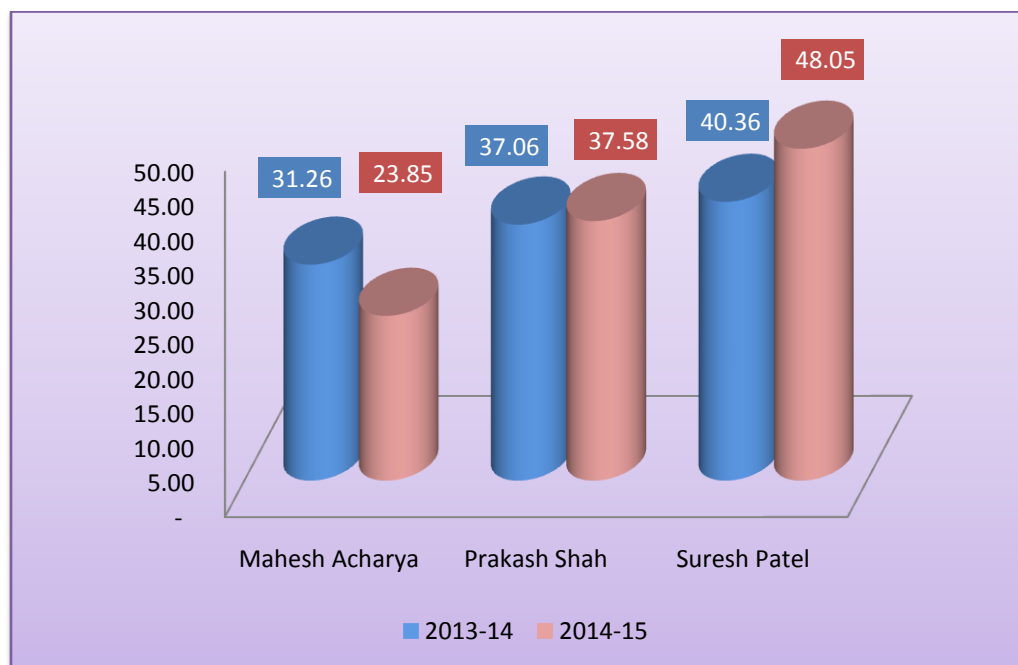
Summary of Sales during the year 2013-14 & 2014-15

Table 1.1 Sales

in Lacs

Sales Man	2013-14	2014-15	Increase/ Decrease
Mahesh Acharya	31.26	23.85	(7.41)
Prakash Shah	37.06	37.58	0.52
Suresh Patel	40.36	48.05	7.70

Chart 1.1 Salesman Wise Sales



Analysis 1.1 Salesman wise Sales

We have observed that Sales of Mr. Mahesh Acharya has been decreased in the year 2014-15 compared to the year 2013-14. Sales efforts should be accelerated by the respective marketing person to increase the sales of the company.

Sales of Mr. Prakash Shah has maintained its level as achieved in the previous year. Suggestions for increasing the sales in the particular territory should be invited from the dealers and implement the suitable option to increase the sales.

Performance of Mr. Suresh Patel is beyond expectations. Regular meetings of marketing personnel are required wherein the person who is not getting sales, he may discuss his problems and find its solutions and the person who is doing better, he can motivate others by providing new ideas.

Sales Reports

Sales Budget

Required – Last two or three years data for forecasting....

Steps –

1. You have sales data for the year 2013-14 and 2014-15. By looking the trend of sales, marketing persons will forecast the sales of the next year. So we want the data like...

Sales Budget										
		Units			Price			Amount		
Product Name	Customer Name	13	14	15	13-14	14-15	15-16	13-14	14-15	15-16
Camera BD68	Arun Electronics	25	15		14,500	16,500		3,62,500	2,47,500	
Camera BD68	Milestone Electronics	22			14,500			3,19,000		
Camera BD68	Vijay Sales and Service	33	30		14,500	16,500		4,78,500	4,95,000	
Home Theatre	Digital Home	20	20		22,000	22,000		4,40,000	4,40,000	
Home Theatre	Vijay Sales and Service	25	28		22,000	22,000		5,50,000	6,16,000	

2. Now for this first of all you need to combine both the data, for that you have to insert one column in both the sheets – “Year” and write down Year of sale.

Sales Data						
Year - 2013-14						
Sales Man	Customer Name	Product Name	Units	Sales Price	Amount	Year
Suresh Patel	Jay Electronics	LCD 32	10	25,000	2,50,000	2013-14
Suresh Patel	Jay Electronics	LCD 36	5	35,000	1,75,000	2013-14
Suresh Patel	Jay Electronics	LCD 42	8	48,000	3,84,000	2013-14
Suresh Patel	Arun Electronics	Laptop 0430	12	28,000	3,36,000	2013-14

3. Now Copy Year 13-14 data and paste in New Sheet, then after copy 14-15 data and paste below it. So now you have both the year data in one sheet having column “Year”. Now run pivot table..

Choose fields to add to report:

☐ Sales Man
☒ Customer Name
☒ Product Name
☒ Units
☒ Sales Price
☒ Amount
☐ Year

Drag fields between areas below:

Report Filter

Column Labels

Σ Values

Row Labels

Product Name

Customer Name

Values

Sum of Units

Average of S...

Sum of Amount

☐ Defer Layout Update

Update

Sales Reports

		Values		
Product Name	Customer Name	Sum of Units	Average of Sales Price	Sum of Amount
Camera BD68	Arun Electronics	40	15500	610000
	Milestone Electronics	22	14500	319000
	Vijay Sales and Service	63	15500	973500
Home Theatre	Digital Home	40	22000	880000
	Vijay Sales and Service	53	22000	1166000
	Vishvakarma Enterprise	24	22000	528000
Laptop 0430	Airson Pvt Ltd	38	28000	1064000
	Arun Electronics	20	28000	560000
	Jalaram Electricals	54	28000	1512000
	Jay Electronics	5	27500	137500
	Vijay Sales and Service	5	27500	137500
	Vishvakarma Enterprise	42	28000	1176000
	VV Electronics Pvt. Ltd.	42	28000	1176000

4. Now to convert this into year by year columns – We use column Label and put “Year” in Column Label..

Drag fields between areas below:

Report Filter

Column Labels

Σ Values

Year

Row Labels

Product Name

Customer Name

Σ Values

Sum of Units

Average of S...

Sum of Amount

Defer Layout Update

Update

5. Your report is ready, Just copy the table and paste in new sheet, then add one column for the year 2015-16 for forecasting purpose for marketing persons. Report looks like as shown in point 1.

Sales Reports

Top 5 Customers Report -

Drag fields between areas below:

Report Filter	Column Labels
	Year
Row Labels	Values
Customer Name	Sum of Amount
☐ Defer Layout Update Update	

Now set pivot table to above values. And then filter customer name –value filters- top 10

Sum of Amount	Year		
Customer Name	2013-14	2014-15	Grand Total
	0	1085000	2044000
	0	1111500	2382000
	0	740000	1300000
	0	700000	1512000
	0	977500	1786500
	0	600000	1855000

Value Filters

- ☒ (Select All)
- ☒ Airson Pvt Ltd
- ☒ Arun Electronics
- ☒ Digital Home
- ☒ Jalaram Electricals
- ☒ Jay Electronics
- ☒ Mehul Patel & Co
- ☒ Milestone Electronics
- ☒ Vijay Sales and Service
- ☒ Vishvakarma Enterprise

Filter Options:

- Clear Filter
- Equals...
- Does Not Equal...
- Greater Than...
- Greater Than Or Equal To...
- Less Than...
- Less Than Or Equal To...
- Between...
- Not Between...
- Top 10...**

Now you can modify the search result i.e. you can write top 5 or top 3 etc....

Sales Reports

Lost Customer Report

You can prepare this report from the above table only, you need to just copy data and paste in new sheet, then after filter Year 2014-15 data –with “Blank” i.e. no sale...

Lost Customer		
Customer Name	2013-14	2014-15
Airson Pvt Ltd	959000	1085000
Arun Electronics	1270500	1111500
Digital Home	560000	740000
Jalaram Electricals	812000	700000
Jay Electronics	809000	977500
Mehul Patel & Co	1355000	600000
Milestone Electronics	319000	
Vijay Sales and Service	1402000	1611000
Vishvakarma Enterprise	1425000	1406500
VV Electronics Pvt. Ltd.	1956000	2716000

Tips – If you want Sales man wise separate reports in separate sheets and for example there are 25 salesman then this is very time consuming – but not in Pivot table..... I want salesmanwise report so put salesman tab in “Report filter” and then after – go to Options – Pivot table options – Show Report Filter Pages.....Done.

The image shows two parts of the Excel interface. On the left is the 'PivotTable Options' task pane, and on the right is the 'PivotTable1' task pane.

PivotTable Options:

- Report Filter: Sales Man
- Column Labels: Year
- Row Labels: Product Name, Customer Name
- Values: Sum of Amount
- Defer Layout Update: ☐
- Update button

PivotTable1:

- PivotTable Name: PivotTable1
- Active Field: Sales Man
- Options:
 - Group Selection
 - Ungroup
 - Group Field
 - Group
- Field Settings:
 - Options
 - Show Report Filter Pages... (checked)
 - Generate GetPivotData (checked)
- Formula Bar: (All)
- Grid: Row 1 contains 'Sales Man', Column B contains '(All)'. Row 2 is empty.