2022-09-22 v2.0.1.333

2022-09-22 v2.0.1.333

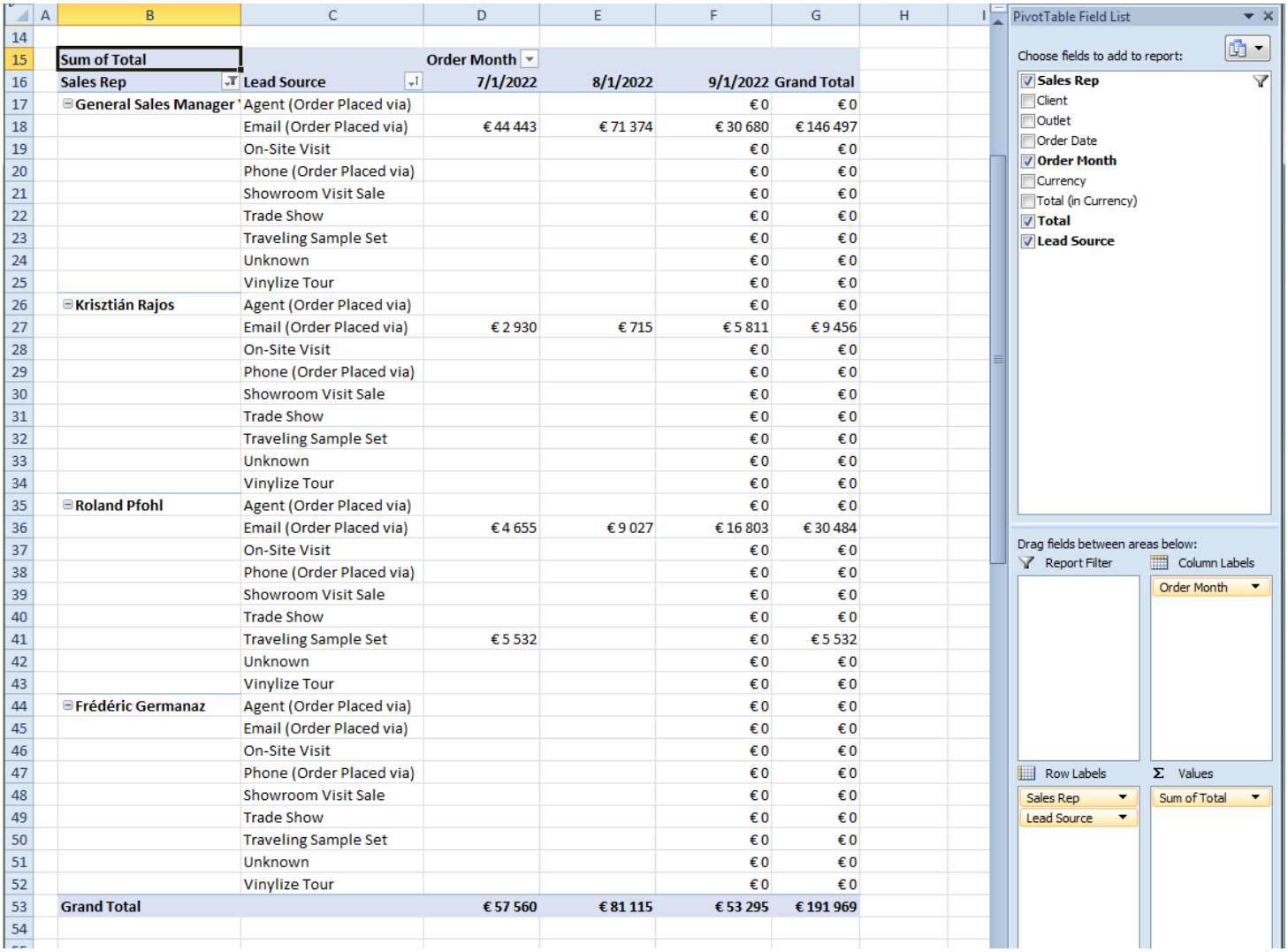
New Sales Reps Report

So this is what the report looks like:

	A	B	C	D	E	F
1						
2		**Time period:**	2022-07-01 to 2022-09-22			
3						
4		**Minimum yearly goal:**	€ 1 321			
5						
6		**Minimum monthly goal:**	€ 110			
7		**Sales this month:**	€ 16 803			
8						
9		**Goal past 3 months:**	€ 330			
10		**Sales last 3 months:**	€ 36 016			
11						
12		**3 Month Sales**				
13		Sales Rep	Roland Pfohl			
14						
15		**Sum of Total**	**Order Month**			
16		**Lead Source**	**7/1/2022**	**8/1/2022**	**9/1/2022**	**Grand Total**
17		Agent (Order Placed via)			€ 0	€ 0
18		Email (Order Placed via)	€ 4 655	€ 9 027	€ 16 803	€ 30 484
19		On-Site Visit			€ 0	€ 0
20		Phone (Order Placed via)			€ 0	€ 0
21		Showroom Visit Sale			€ 0	€ 0
22		Trade Show			€ 0	€ 0
23		Traveling Sample Set	€ 5 532		€ 0	€ 5 532
24		Unknown			€ 0	€ 0
25		Vinylize Tour			€ 0	€ 0
26		**Grand Total**	**€ 10 187**	**€ 9 027**	**€ 16 803**	**€ 36 016**
27						

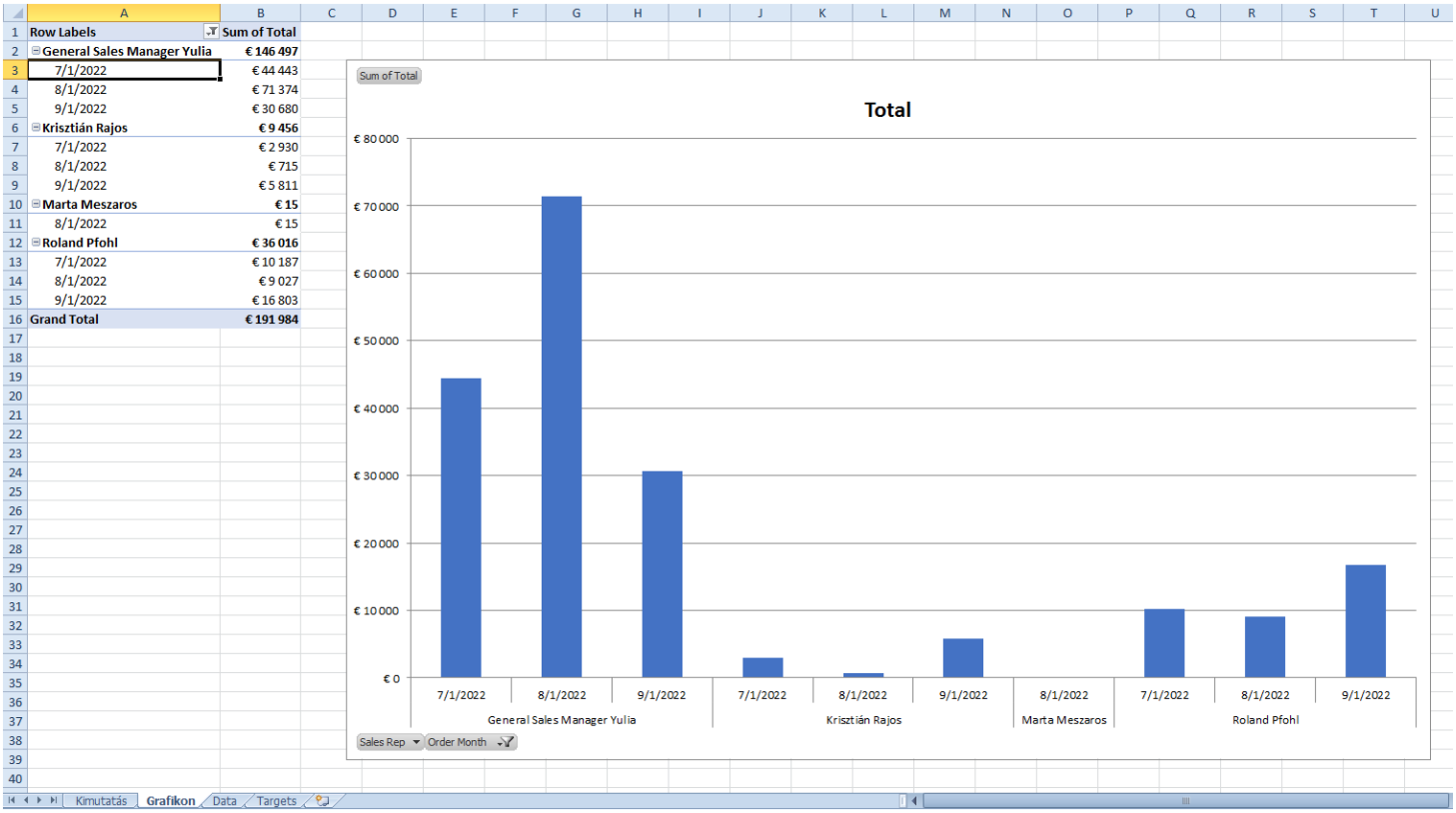
I've highlighted where you have to select one of the sales reps, the numbers then update automatically. At the top you have some summary values, and then in the pivot table below you have it all broken down by month and lead source.

If you want to see data for more than one rep, you can play with the pivot:

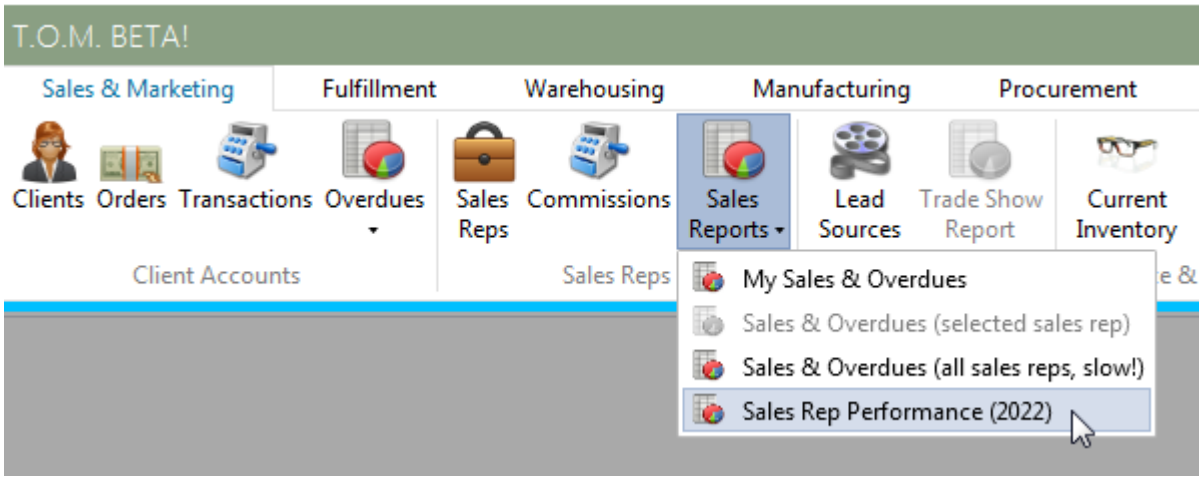


Sum of Total		Order Month			
Sales Rep	Lead Source	7/1/2022	8/1/2022	9/1/2022	Grand Total
General Sales Manager	Agent (Order Placed via)			€ 0	€ 0
	Email (Order Placed via)	€ 44 443	€ 71 374	€ 30 680	€ 146 497
	On-Site Visit			€ 0	€ 0
	Phone (Order Placed via)			€ 0	€ 0
	Showroom Visit Sale			€ 0	€ 0
	Trade Show			€ 0	€ 0
	Traveling Sample Set			€ 0	€ 0
	Unknown			€ 0	€ 0
	Vinylize Tour			€ 0	€ 0
Krisztián Rajos	Agent (Order Placed via)			€ 0	€ 0
	Email (Order Placed via)	€ 2 930	€ 715	€ 5 811	€ 9 456
	On-Site Visit			€ 0	€ 0
	Phone (Order Placed via)			€ 0	€ 0
	Showroom Visit Sale			€ 0	€ 0
	Trade Show			€ 0	€ 0
	Traveling Sample Set			€ 0	€ 0
	Unknown			€ 0	€ 0
	Vinylize Tour			€ 0	€ 0
Roland Pfohl	Agent (Order Placed via)			€ 0	€ 0
	Email (Order Placed via)	€ 4 655	€ 9 027	€ 16 803	€ 30 484
	On-Site Visit			€ 0	€ 0
	Phone (Order Placed via)			€ 0	€ 0
	Showroom Visit Sale			€ 0	€ 0
	Trade Show			€ 0	€ 0
	Traveling Sample Set	€ 5 532		€ 0	€ 5 532
	Unknown			€ 0	€ 0
	Vinylize Tour			€ 0	€ 0
Frédéric Germanaz	Agent (Order Placed via)			€ 0	€ 0
	Email (Order Placed via)			€ 0	€ 0
	On-Site Visit			€ 0	€ 0
	Phone (Order Placed via)			€ 0	€ 0
	Showroom Visit Sale			€ 0	€ 0
	Trade Show			€ 0	€ 0
	Traveling Sample Set			€ 0	€ 0
	Unknown			€ 0	€ 0
	Vinylize Tour			€ 0	€ 0
Grand Total		€ 57 560	€ 81 115	€ 53 295	€ 191 969

I've also added a pivot chart that you can play around with:

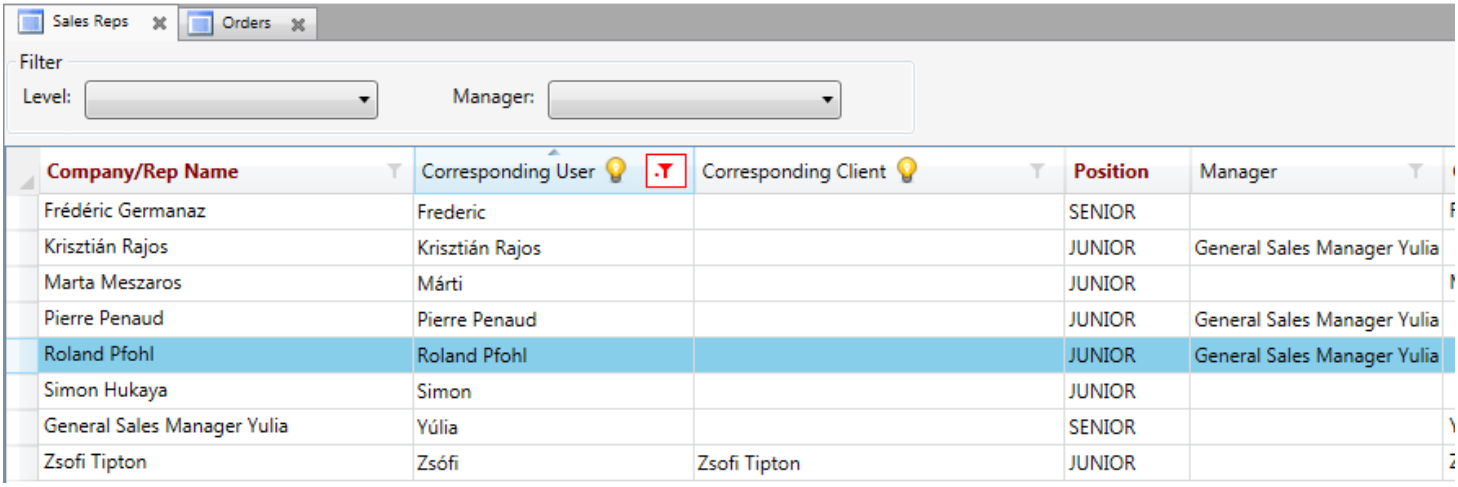


You can generate the report here:

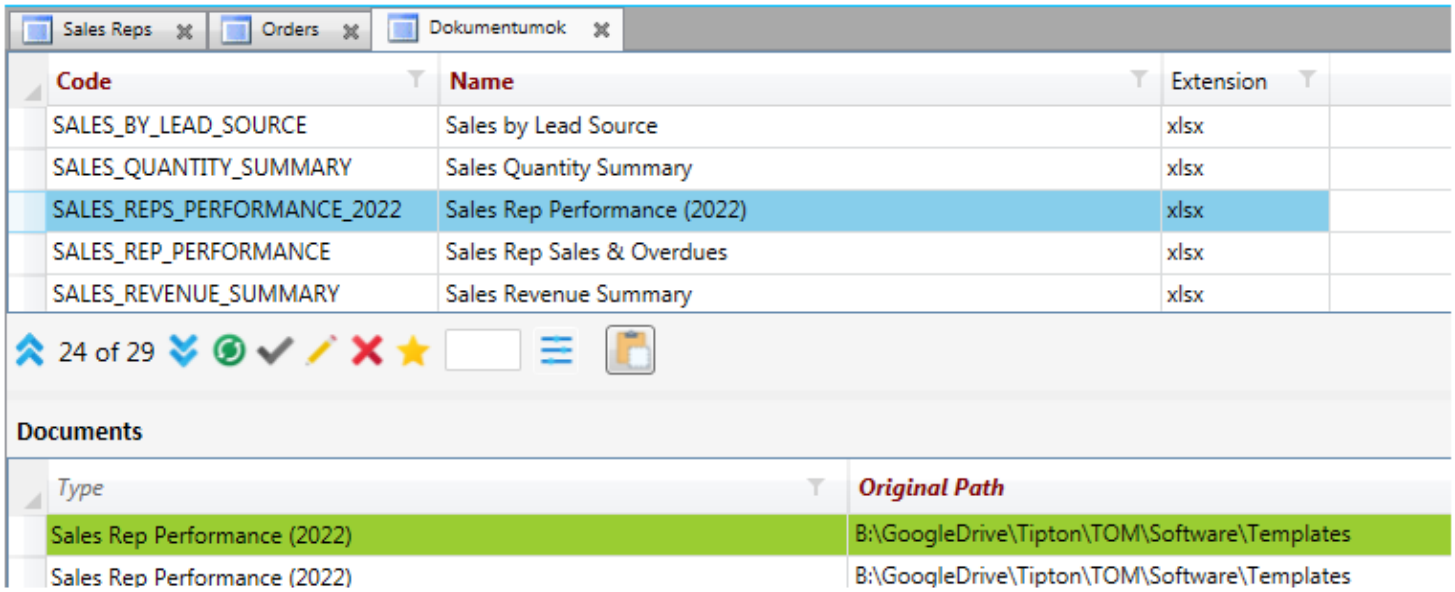


The report shows all sales reps for managers and admins, and only the current user's data for regular users.

I also filtered the report to only show sales for sales reps who have a corresponding user set in TOM, so sales reps such as "Silas Seattle" or "Bernard King" are not included (but let me know if this is wrong):

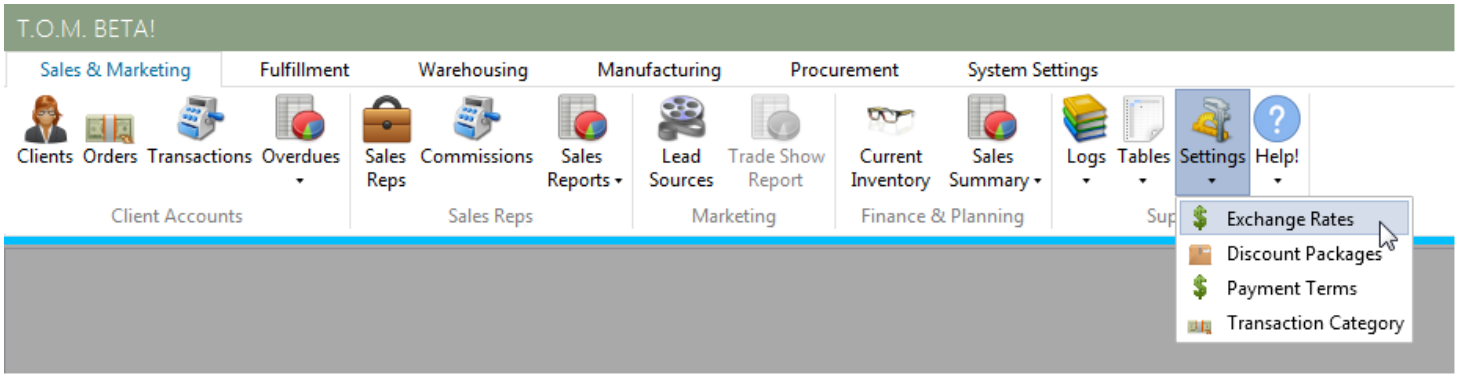


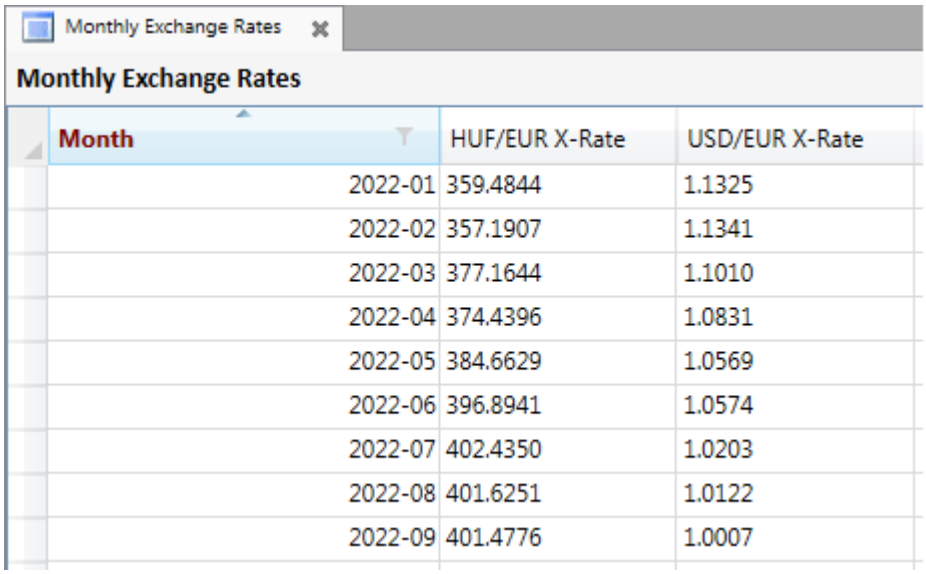
The template for this report can be maintained here:



Things to do:

(1) You will have to enter monthly average exchange rates for the current and past months when generating the report, so that TOM can calculate EUR sales values for HUF and USD sales:





Monthly Exchange Rates

Monthly Exchange Rates

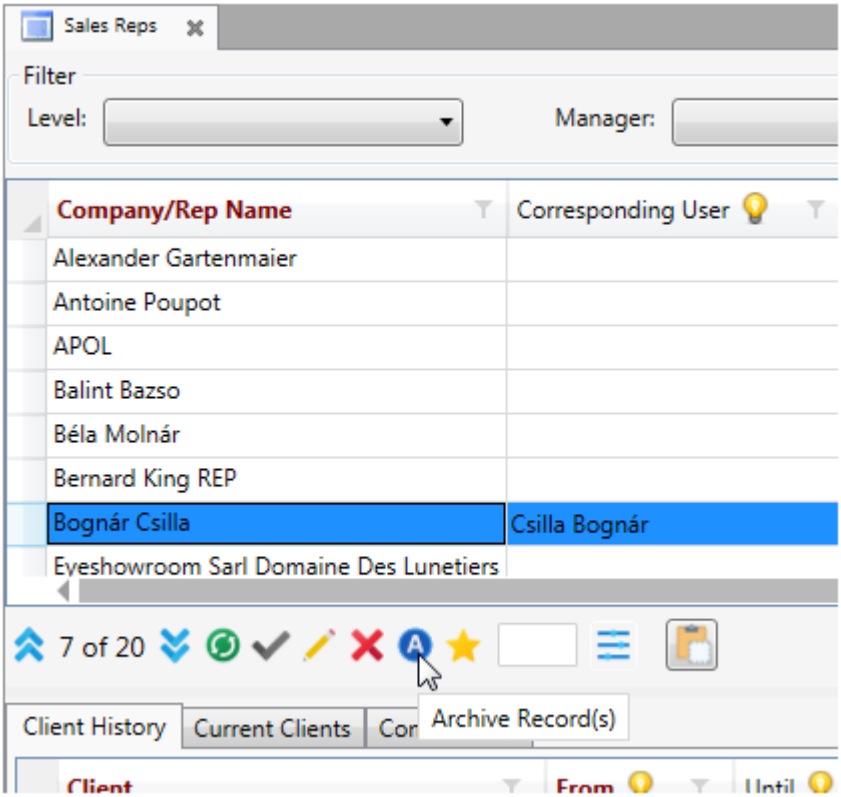
Month	HUF/EUR X-Rate	USD/EUR X-Rate
2022-01	359.4844	1.1325
2022-02	357.1907	1.1341
2022-03	377.1644	1.1010
2022-04	374.4396	1.0831
2022-05	384.6629	1.0569
2022-06	396.8941	1.0574
2022-07	402.4350	1.0203
2022-08	401.6251	1.0122
2022-09	401.4776	1.0007

Here is a good website to get average monthly rates:

https://www.x-rates.com/average/?from=EUR&to=HUF&amount=1&year=2022

Zack, if you want I can program TOM to grab these rates automatically and store it daily, but this would involve 4-6 hours of programming (expensive!). For now we agreed that you guys will just enter the rates manually.

(2) It would be a good idea to go through and archive all old / inactive sales reps in TOM. You can just use the "Archive" button:



(3) Seems to me that the lead source maybe is not always set properly? Looking at Roland for example all his sales in the last 3 months are "via email" or "traveling sample set". So you guys will have to pay attention to setting the lead source correctly.

Revision #5
Created Thu, Sep 22, 2022 5:40 AM by Lieszkovszky László
Updated Mon, Sep 26, 2022 1:27 PM by Lieszkovszky László