

# 2022-09-22 v2.0.1.333

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### New Sales Reps Report

So this is what the report looks like:

	A	B	C	D	E	F
1						
2		<b>Time period:</b>	2022-07-01 to 2022-09-22			
3						
4		<b>Minimum yearly goal:</b>	€	1 321		
5						
6		<b>Minimum monthly goal:</b>	€	110		
7		<b>Sales this month:</b>	€	16 803		
8						
9		<b>Goal past 3 months:</b>	€	330		
10		<b>Sales last 3 months:</b>	€	36 016		
11						
12		<b>3 Month Sales</b>				
13		Sales Rep	Roland Pfohl			
14						
15		<b>Sum of Total</b>	<b>Order Month</b>			
16		<b>Lead Source</b>	<b>7/1/2022</b>	<b>8/1/2022</b>	<b>9/1/2022</b>	<b>Grand Total</b>
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		<b>Grand Total</b>	<b>€ 10 187</b>	<b>€ 9 027</b>	<b>€ 16 803</b>	<b>€ 36 016</b>
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:

14							
15	Sum of Total		Order Month				
16	Sales Rep	Lead Source	7/1/2022	8/1/2022	9/1/2022	Grand Total	
17	General Sales Manager	Agent (Order Placed via)			€ 0	€ 0	
18		Email (Order Placed via)	€ 44 443	€ 71 374	€ 30 680	€ 146 497	
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			€ 0	€ 0	
24		Unknown			€ 0	€ 0	
25		Vinylize Tour			€ 0	€ 0	
26	Krisztián Rajos	Agent (Order Placed via)			€ 0	€ 0	
27		Email (Order Placed via)	€ 2 930	€ 715	€ 5 811	€ 9 456	
28		On-Site Visit			€ 0	€ 0	
29		Phone (Order Placed via)			€ 0	€ 0	
30		Showroom Visit Sale			€ 0	€ 0	
31		Trade Show			€ 0	€ 0	
32		Traveling Sample Set			€ 0	€ 0	
33		Unknown			€ 0	€ 0	
34		Vinylize Tour			€ 0	€ 0	
35	Roland Pfohl	Agent (Order Placed via)			€ 0	€ 0	
36		Email (Order Placed via)	€ 4 655	€ 9 027	€ 16 803	€ 30 484	
37		On-Site Visit			€ 0	€ 0	
38		Phone (Order Placed via)			€ 0	€ 0	
39		Showroom Visit Sale			€ 0	€ 0	
40		Trade Show			€ 0	€ 0	
41		Traveling Sample Set	€ 5 532		€ 0	€ 5 532	
42		Unknown			€ 0	€ 0	
43		Vinylize Tour			€ 0	€ 0	
44	Frédéric Germanaz	Agent (Order Placed via)			€ 0	€ 0	
45		Email (Order Placed via)			€ 0	€ 0	
46		On-Site Visit			€ 0	€ 0	
47		Phone (Order Placed via)			€ 0	€ 0	
48		Showroom Visit Sale			€ 0	€ 0	
49		Trade Show			€ 0	€ 0	
50		Traveling Sample Set			€ 0	€ 0	
51		Unknown			€ 0	€ 0	
52		Vinylize Tour			€ 0	€ 0	
53	<b>Grand Total</b>		<b>€ 57 560</b>	<b>€ 81 115</b>	<b>€ 53 295</b>	<b>€ 191 969</b>	
54							

**PivotTable Field List**

Choose fields to add to report:

- Sales Rep
- Client
- Outlet
- Order Date
- Order Month
- Currency
- Total (in Currency)
- Total
- Lead Source

Drag fields between areas below:

Report Filter

Column Labels

Order Month

Row Labels

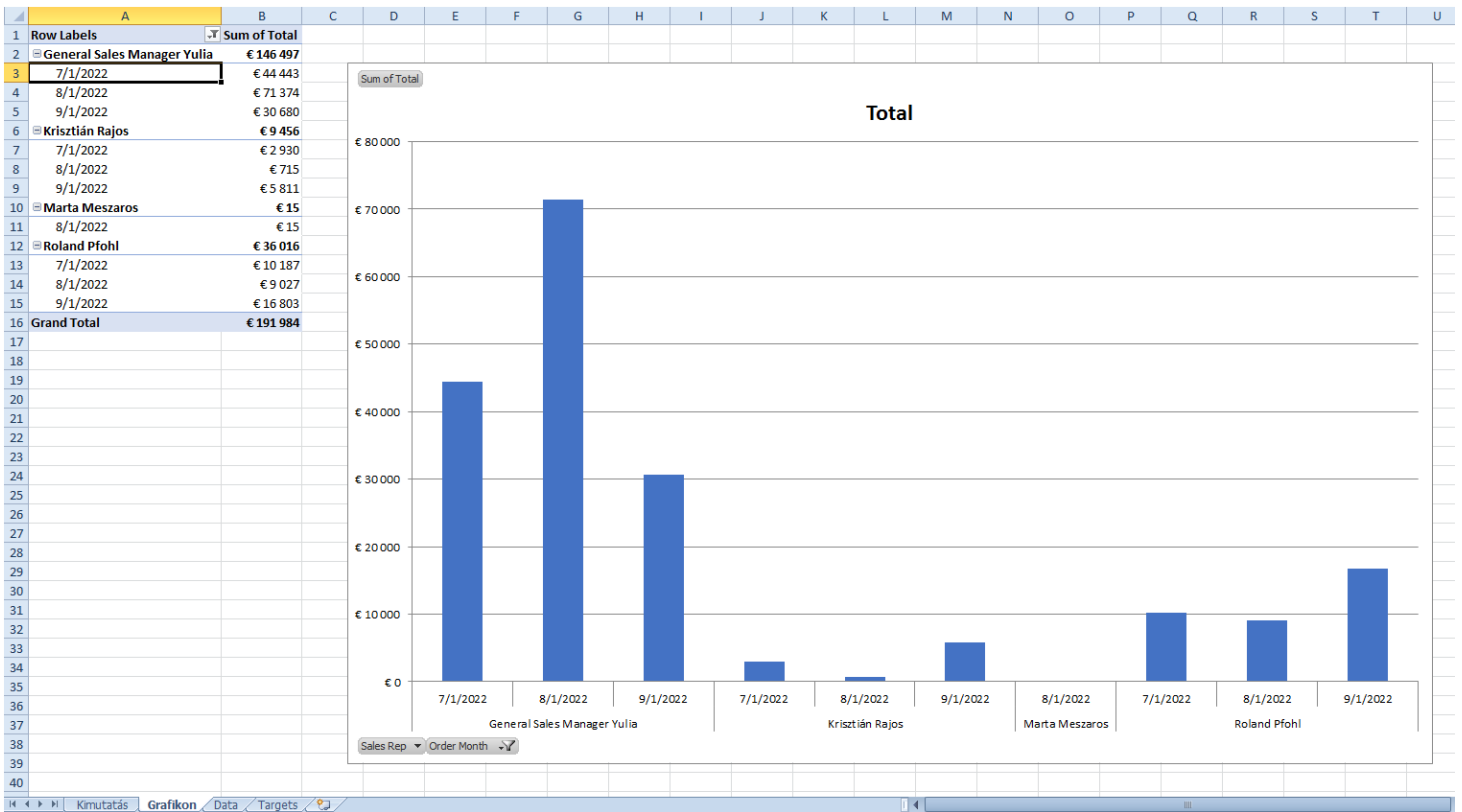
Sales Rep

Lead Source

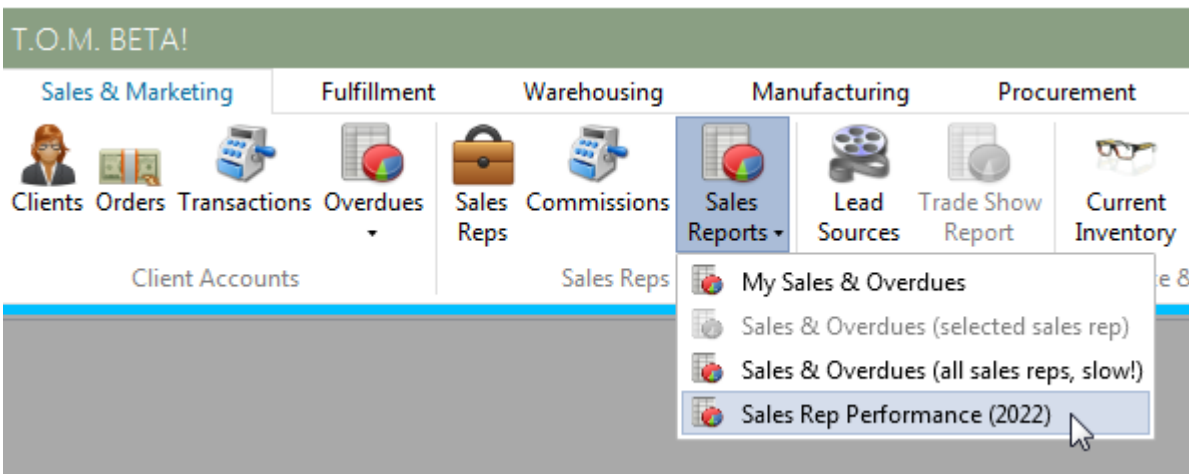
Values

Sum of Total

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):

Company/Rep Name	Corresponding User	Corresponding Client	Position	Manager
Frédéric Germanaz	Frederic		SENIOR	
Krisztián Rajos	Krisztián Rajos		JUNIOR	General Sales Manager Yulia
Marta Meszaros	Márti		JUNIOR	
Pierre Penaud	Pierre Penaud		JUNIOR	General Sales Manager Yulia
Roland Pfohl	Roland Pfohl		JUNIOR	General Sales Manager Yulia
Simon Hukaya	Simon		JUNIOR	
General Sales Manager Yulia	Yúlia		SENIOR	
Zsofi Tipton	Zsófi	Zsofi Tipton	JUNIOR	

The template for this report can be maintained here:

Code	Name	Extension
SALES_BY_LEAD_SOURCE	Sales by Lead Source	xlsx
SALES_QUANTITY_SUMMARY	Sales Quantity Summary	xlsx
SALES_REPS_PERFORMANCE_2022	Sales Rep Performance (2022)	xlsx
SALES_REP_PERFORMANCE	Sales Rep Sales & Overdues	xlsx
SALES_REVENUE_SUMMARY	Sales Revenue Summary	xlsx

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**Documents**

Type	Original Path
Sales Rep Performance (2022)	B:\GoogleDrive\Tipton\TOM\Software\Templates
Sales Rep Performance (2022)	B:\GoogleDrive\Tipton\TOM\Software\Templates

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:

Navigation menu with categories: Sales & Marketing, Fulfillment, Warehousing, Manufacturing, Procurement, System Settings.

Sub-categories: Client Accounts, Sales Reps, Marketing, Finance & Planning, Sup.

Settings dropdown menu items: Exchange Rates, Discount Packages, Payment Terms, Transaction Category.

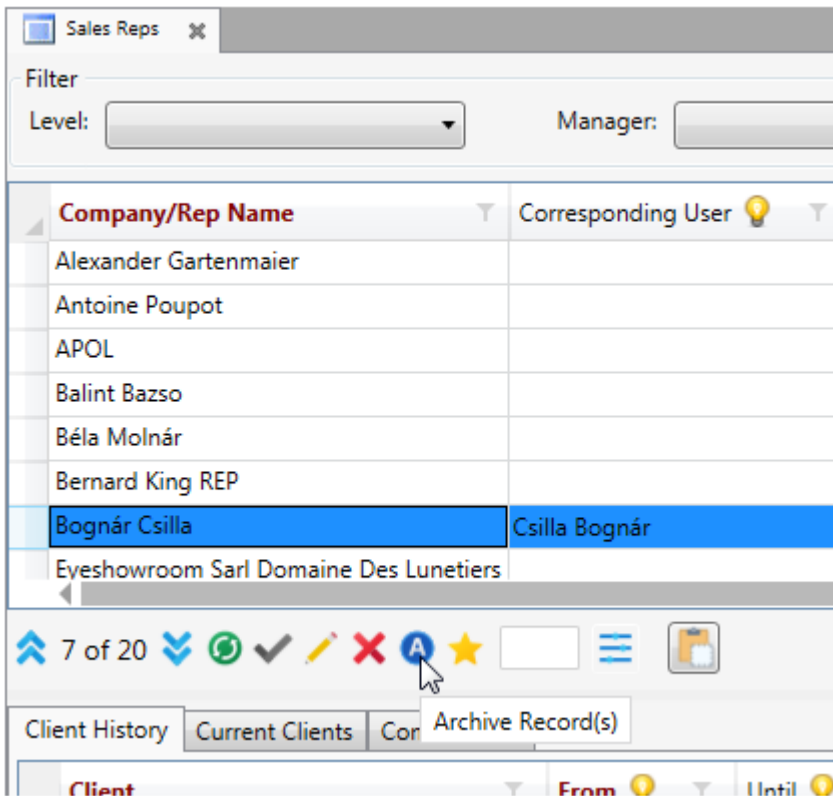
Monthly Exchange Rates			
Month	HUF/EUR X-Rate	USD/EUR X-Rate	
2022-01	359.4844	1.1325	
2022-02	357.1907	1.1341	
2022-03	377.1644	1.1010	
2022-04	374.4396	1.0831	
2022-05	384.6629	1.0569	
2022-06	396.8941	1.0574	
2022-07	402.4350	1.0203	
2022-08	401.6251	1.0122	
2022-09	401.4776	1.0007	

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