

Customer Sales Report

Last Modified on 04/20/2022 7:25 pm EDT

The Sales by Salesperson Report prints a list of Recurring, Work Order, and Manual Invoices and Credits for each Salesperson that meet the criteria of the options selected. The amounts on this report include sales tax.

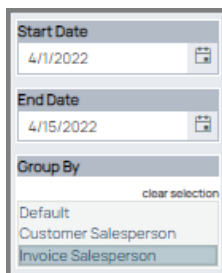
There are three versions of this report available:

- Summary (default) - prints the total invoices, credits, and the net sales amount for each customer.
- Sales by Customer Salesperson (Detail) - prints the invoices, credits, and net sales amount for each invoice type and is sorted and grouped by the salesperson assigned to the customer.
- Sales by Invoice Salesperson (Detail) - prints the invoices, credits, and net sales amount for each invoice type and is sorted and grouped by the salesperson selected on the invoice or credit.

Report Parameters

The parameters available for this report are:

- Start and End Date
- Group By (select only one)
 - Default (summary report)
 - Customer Salesperson (detail report)
 - Invoice Salesperson (detail report)



The screenshot shows a form with three main sections: 'Start Date' with a text input containing '4/1/2022' and a calendar icon; 'End Date' with a text input containing '4/15/2022' and a calendar icon; and 'Group By' with a dropdown menu. The dropdown menu is open, showing three options: 'Default', 'Customer Salesperson', and 'Invoice Salesperson'. A 'clear selection' link is visible above the dropdown options.

Generate the Customer Sales Report

To generate this report, navigate to Reports > Sales > Customer Sales Report.

The Customer Sales Report page is displayed. In the Parameters area, make the desired selections. When finished, click on the Preview button.

Customer Sales Report

MANAGELY™

Customer Sales Report
 Dates: 04/16/22 - 04/16/22
 Group By: Default

Start Date: 4/1/2022
 End Date: 4/15/2022
 Group By: Default
 Customer Salesperson
 Invoice Salesperson

Customer #	Name	Invoice Type			Credits	Net Sales	Sales Tax	Total Sales
		Recurring	Work Order	Manual				
Collapse/Expand All								
Grand Totals								
Generated on 4/15/2022 10:02:13 AM 1 of 1								

Preview

The report results are based on the selections in the parameters area. Users may use the function buttons to print or export the report.

Below is a sample of the Sales by Invoice Salesperson style report.

Customer Sales Report

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Customer Sales Report
 Dates: 03/02/22 - 04/01/22
 Group By: Invoice Salesperson

Customer #	Name	Invoice Type			Credits	Net Sales	Sales Tax	Total Sales
		Recurring	Work Order	Manual				
Collapse/Expand All								
Salesperson: DeBaggis, Justin								
1028	Papay, Travis	11,475.71	0.00	0.00	0.00	11,475.71	981.74	12,457.45
Totals: DeBaggis, Justin		11,475.71	0.00	0.00	0.00	11,475.71	981.74	12,457.45
Salesperson: Brown, Dan								
1029	Donoson, Bill	0.00	335.00	0.00	0.00	335.00	28.66	363.66
1032	Securo	0.00	75.00	0.00	0.00	75.00	0.00	75.00
1035	Waters, Roger	0.00	60.00	0.00	0.00	60.00	5.13	65.13
1240	Wazny, Jerry	0.00	0.00	9.09	0.00	9.09	0.00	9.09
3719	Wood, Emily	61.64	1,159.45	0.00	0.00	1,221.09	69.28	1,290.37
3720	Watson, George	0.00	338.75	0.00	0.00	338.75	19.73	358.48
Totals: Brown, Dan		61.64	1,968.20	9.09	0.00	2,038.93	122.80	2,161.73
Salesperson: Ackerman, Kathy								
1044	Adams, Justin	0.00	0.00	512.50	0.00	512.50	43.84	556.34
1277	Rogers, Steve	0.00	0.00	35.00	0.00	35.00	2.98	37.98

Below is a sample of the Sales by Customer style report.

Customer Sales Report



Customer Sales Report

Dates: 03/02/22 - 04/01/22

Group By: Default

Customer #	Name	Invoice Type			Credits	Net Sales	Sales Tax	Total Sales
		Recurring	Work Order	Manual				
Collapse/Expand All								
1028	Papay, Travis	11,475.71	0.00	0.00	0.00	11,475.71	981.74	12,457.45
1029	Donoson, Bill	0.00	335.00	0.00	0.00	335.00	28.66	363.66
1277	Rogers, Steve	0.00	0.00	35.00	0.00	35.00	2.98	37.98
1032	Securo	0.00	75.00	0.00	0.00	75.00	0.00	75.00
1035	Waters, Roger	0.00	60.00	0.00	0.00	60.00	5.13	65.13
1240	Wazny, Jerry	0.00	0.00	9.09	0.00	9.09	0.00	9.09
3709	Plymouth Bakery #4	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3719	Wood, Emily	61.64	1,159.45	3,379.86	-180.00	4,420.95	200.23	4,621.18
3720	Watson, George	0.00	338.75	0.00	-25.00	313.75	19.73	333.48
1044	Adams, Justin	0.00	0.00	512.50	0.00	512.50	43.84	556.34
3438	Aacott, Alice	0.00	85.00	0.00	0.00	85.00	7.27	92.27
3501	A Business Company	304.33	0.00	0.00	0.00	304.33	26.04	330.37
3583	Test1, Toby	0.00	211.25	0.00	0.00	211.25	10.26	221.51
3699	Steve's Snow Blowing	0.00	0.00	927.95	0.00	927.95	88.22	1,016.17
Grand Totals		11,811.68	2,364.15	4,361.16	-205.00	19,365.53	1,414.10	20,779.63