

Sales Report part 1

Line of Business Report

The Line of Business report is similar to the Top Seller's report but lists only deals associated with a Dealer who has a defined Line of Business.

The screenshot shows the 'Sale Profile' application interface. At the top, there are tabs for 'Sale Profile' and 'Dealer Profile'. Below the tabs, there is a navigation menu on the left with options like 'Consignment Sales', 'Created', 'Pending', 'Current', and 'Closed'. The main area displays a table with columns: Date, Time, Name, Type, Status, Vehicle Count, Bidder Count, Seller Count, Guest Count, and Res. Allocation. A row is highlighted with a red border. Below the table, there are tabs for 'Line Detail', 'Registered Buyers', 'Registered Sellers', 'Run Numbers', and 'Registered Guests'. A summary table shows counts and percentages for 'Sold', 'If Sale', 'No Sale', and 'Thru Block Total'. Below this is a table with columns: Run #, Seller, State, Year, Make, Model, Style, VSN, VIN, Mileage, and Buyer. On the right side, there is a 'REPORTS' sidebar with a list of report categories, including 'Sales Reports' and 'Line of Business', which are highlighted with red boxes.

- Open the **Sale Profile** application.
- Select the Sale Date
- Select the Reports Menu
- Then select the Sales Reports sub-menu > Line of Business.
- This will launch the report wizard.

The screenshot shows the 'Line Of Business' report wizard dialog box. It has a title bar with 'Line Of Business' and a close button. The dialog contains the following fields and controls:

- Begin Date: 04/25/2012
- End Date: 09/27/2022
- Begin Time: 12:00:00 AM
- End Time: 11:59:59 PM
- LOB: All (dropdown menu)
- Include all Sales in the System:
- Buttons: Ok, Cancel

- Select the desired 'Begin' and 'End' dates or we can check the 'Include all Sales in the system' checkbox.
- In the Line of Business (in this example we use All).

New	15	6%
Used	216	8%
Lease	5	2%
Salvage	2	1%
GSA	1	0%
Wholesale	16	6%
Rental	1	0%
	256	

- Click 'OK' when done to create and print the report.

Market Breakdown Report

The Market Breakdown report is used to view the sale prices of vehicles over time.

Note: You must select the Sale Date from the grid before running the report

The screenshot shows the 'Sale Profile' application interface. At the top, there are filters for 'Sale Profile' and 'Dealer Profile'. Below that, a 'Consignment Sales' section shows '1' item. The main grid displays a table with columns: Date, Time, Name, Type, Status, Vehicle Count, Bidder Count, Seller Count, Guest Count, and Res. Allocation. The first row is highlighted in red and contains the date '09/27/2022'. Below the grid, there are tabs for 'Lone Detail', 'Registered Buyers', 'Registered Sellers', 'Run Numbers', and 'Registered Guests'. A summary table shows counts and percentages for 'Sold', 'If Sale', 'No Sale', and 'Thru Block Total'. The 'REPORTS' sidebar on the right lists various reports, with 'Market Breakdown' highlighted in red.

- Open the **Sale Profile** application.
- Select the Sale Date
- Select the Reports Menu
- Then select the Market Breakdown report sub-menu
- This will launch the report wizard.

The screenshot shows the 'Market Breakdown' report wizard dialog box. It has a title bar with a close button. The fields are: 'Begin Date' (09/27/2022), 'End Date' (09/27/2022), 'Begin Time' (12:00:00 AM), and 'End Time' (11:59:59 PM). There is a checked checkbox for 'Include Inactive Vehicles' and a 'Select Lane' dropdown menu set to 'All'. At the bottom, there are 'Ok' and 'Cancel' buttons.

- You may select a 'Begin' and 'End' date if you wish to view information on more than one Sale.
- You can check the 'Include Inactive Vehicles' because we want to have a comprehensive report on all vehicles even if they have left the site.
- Click 'OK' when done to create and print the report

Sales Count Report

The sale Count report is used to track the number of deals for a specific Sale person or all salespersons.

Note: You must select the Sale Date from the grid before running the report

The screenshot shows the 'Sales Profile' application interface. At the top, there are tabs for 'Sale Profile' and 'Dealer Profile'. A button indicates 'Press Esc to exit full screen'. Below this, there's a navigation bar with 'Consignment Sales' and a count of 1. A filter sidebar on the left shows status options: Created (0), Pending (0), Current (1), and Closed (0). The main area features a table with columns: Date, Time, Name, Type, Status, Vehicle Count, Bidder Count, Seller Count, Guest Count, and Res. Allocation. The first row is highlighted in red and contains the date 09/27/2022. Below the table, there are tabs for 'Lane Detail', 'Registered Buyers', 'Registered Sellers', 'Run Numbers', and 'Registered Guests'. A summary section shows counts for 'Sold', 'If Sale', 'No Sale', and 'Thru Block Total'. To the right, a 'REPORTS' menu is visible, with 'Sales Reports' and 'Sales Count' highlighted in red. The 'Sales Count' report is selected, and a sub-menu is shown with 'Sales Count' also highlighted in red.

- Open the **Sale Profile** application.
- Select the Sale Date
- Select the Reports Menu
- Then select the Sales Count report sub-menu
- This will launch the report wizard.

The screenshot shows the 'Sales Count' report wizard dialog box. It has a title bar with 'Sales Count' and a close button. The dialog contains several input fields: 'Begin Date' (09/26/2022), 'End Date' (09/28/2022), 'Begin Time' (12:00:00 AM), and 'End Time' (11:59:59 PM). There is a dropdown menu for 'Sales Rep'. At the bottom, there is a checkbox for 'Exclude Reps' and two buttons: 'Ok' and 'Cancel'.

- You may select a 'Begin' and 'End' date if you wish to view information on more than one Sale.
- You may select a specific Sales Rep or Select 'All'.

- Click 'OK' when done to create and print the report.

Deal Count Report

The Deal Count report is used to view buy and sell deals according to Dealer and may be listed by Dealer Name or Percentage Sold.

Note: You must select the Sale Date from the grid prior to running the report

The screenshot shows the 'Sale Profile' application interface. At the top, there are tabs for 'Sale Profile' and 'Dealer Profile'. Below the tabs, there's a navigation bar with 'Consignment Sales' and a count of 1. The main area displays a table of sales items. The first row is highlighted with a red border, showing a sale on 09/27/2022 at 12:00:00 PM, named '169 - Tuesday Sale', with a status of 'Current'. Below the table, there are summary statistics for 'All' items, including counts and percentages for 'Sold', 'If Sale', 'No Sale', and 'Thru Block Total'. To the right, a 'REPORTS' menu is visible, with 'Deal Count' highlighted in red.

- Open the **Sale Profile** application.
- Select the Sale Date
- Select the Reports Menu
- Then select the Deal Count report sub-menu
- This will launch the report wizard.

The 'Select Dealer' dialog box is shown. It has a title bar with a close button. Below the title bar, there are two date pickers: 'Begin Date' set to 10/01/2021 and 'End Date' set to 09/28/2022. There is a 'To' dropdown menu. Below that, there are two columns of labels: 'Account', 'Type', 'Orig Reg' on the left, and 'Status', 'Allowed', 'Last Visit' on the right. At the bottom, there are three checkboxes: 'Select all dealers', 'Include reps', and 'Include Cont. Info'. The 'Sort Order' is set to 'Bought Amo'. There are 'Ok' and 'Cancel' buttons at the bottom right.

- You may select a 'Begin' and 'End' date if you wish to view information on more than one Sale.

- You may select a specific Dealer or the 'Select all dealers' checkbox.
- To include the rep check the checkbox.
- You can sort the report by Bought Amount, Bought Count, Dealer Name, Sold Amount, Sold Count, and or Sold percentage.
- Click 'OK' when done to create and print the report.

The Deal count report generates both a PDF and Graph report for a visual representation of the PDF data.

Revision #2

Created 3 October 2022 16:35:26

Updated 3 October 2022 21:38:04