## **Monthly Sales Reports**

## Increases and deficits by account

Prepared Monday following month end

1

Open sales cube and refresh data

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Open "sales by rep" tab

1

Select rep at the top "customer account. Sales rep"



Using column labels filter select correct month end year to date for current year and previous

Open new excel sheet and copy and paste columns A—D and row 4 to bottom



Whilst highlighted add filters and format columns to auto fit on width



Change cell D1 from "grand Total" to difference



Cell D2 add formula "=C2-B2" and copy down column



Highlight all of column D and format to currency, 2 decimal places, £ symbol and -£number in red



Sort column using filter largest to smallest cut and pasting grand total back to the bottom if required



On AX search all closed accounts and export to excel on a third spreadsheet



Copy closed account numbers only, column A, to second spreadsheet using a second tab



Second spreadsheet, first tab, insert a column B and use formula "=COUNTIF(sheet2!A:A,sheet1!A2)" copy down column

Filter number 1 in COUNTIF column and delete rows then delete COUNTIF column and second tab leaving only open accounts



Rename first tab after account manager using initials



Repeat for each account manager using tab 2 and 3 back to step 4 and save "increases and deficits by account YTD"

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