Sales Breakdown Report (with Sales Velocity)

An excel based solution, which is macro free, business owners to monitor the source, success and breakdown of their sales, all in one place. If you need a breakdown of your sales, take a look at the details below.

See which marketing avenues are more successful

See which types of jobs are most lucrative

See how much money you're making per hour

See a comprehensive breakdown of your sales

Monitor sales, costs and profits of your jobs

Enter your sales as they happen and see immediate report
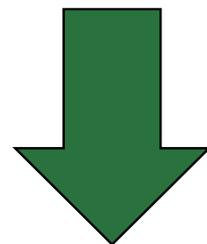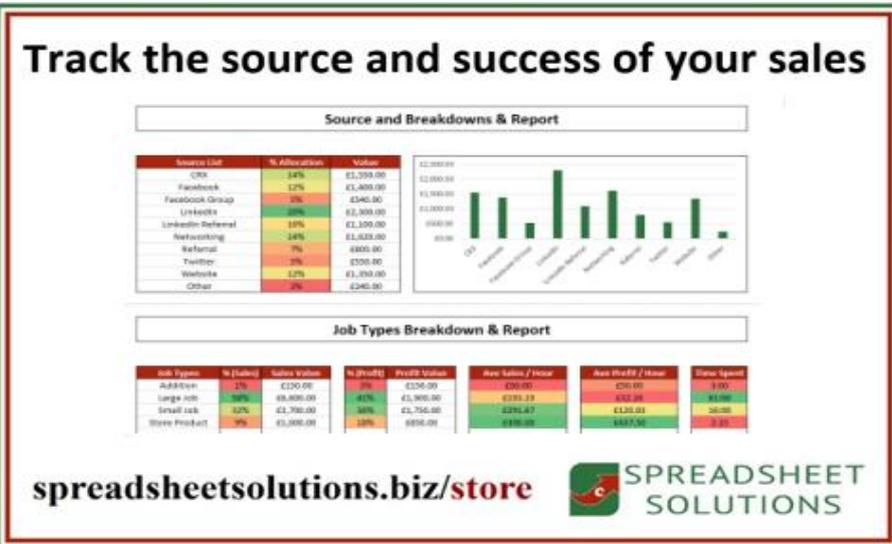
Select a desired month and see up to date report

Compare referral sources and job types

See your current sales velocity

Set a sales velocity target and see the predicted changes

And so much more…

Track the source and success of your sales

spreadsheetsolutions.biz/store — SPREADSHEET SOLUTIONS

Scroll down to see more about this product

Months	Target
May 2018	£7,000.00
Jun 2018	£5,000.00
Jul 2018	
Aug 2018	
Sep 2018	
Oct 2018	
Nov 2018	
Dec 2018	
Jan 2019	
Feb 2019	

Once you have entered a correct date above (you'll see a green tick). The correct dates for the period selected should appear to the left. You can then input a target amount for each month. Your actual sales will compare to these targets.

You can leave these targets blank if you do not use targets, in that case the relevant reports will be blank.

The target prices entered need to be Excluding VAT, and are sales prices, not profit values.

Job Types
Addition
Large Job
Small Job
Store Product

The Job Types are just categories which you want to break your jobs into. You can input up to 10 categories of job type, and then select one job type per sale. This will then compare these job types on the reports.

If you edit these once you're already using the Sales Capture, the selected items will not change on the Sales Capture, you will need to manually change them.

Please ensure that there are not duplicate Job Types listed.

Source List	Code
CRX	CRX
Facebook	Facebook
Facebook Group	FB Group
LinkedIn	LinkedIn
LinkedIn Referral	LI Referral
Networking	Networking
Referral	Referral
Twitter	Twitter
Website	Website
Other	Other

These lists are for various sources of your sales. You can input up to 10. For example, you may have LinkedIn, Referral, Website, etc. Then you can assign each sale to one or more of the sources (as a %), in order to monitor the success of each source.

Put the full name in the Source List column, and an abbreviation on the Code column. The full name will show on the report, and the abbreviation as the header on the Sales Capture list.

If you get stuck, use the video links

Watch on YouTube

On the Sales Capture sheet, there is a column for Status. You ony need complete that column if you are using the Sales Velocity calcultor. In that case, enter ALL sales enquiries, and select the status as below (chnage when necessary). If you're not using it, and therefore capturing only sales, then just leave that column blank. Any item with a blank Status column (or marked as a sale), will be assigned as a sale.

Enquiry
Sale
Declined

The object of this spreadsheet is to analyse your sales and show you where they are coming from, and which types are more lucrative. In order to do that, you can list the possible sources (up to 10) of your sale referrals (such as social media or networking groups). You can also assign job types (up to 10) and put a target value for sales for each month of the year. These will then be used throughout this spreadsheet. You use a spreadsheet for a financial year, and then start a new one. This first page is a setup for your spreadsheet.

Sales Capture

Totals:	£11,850.00

If you input the same client on various occasions, make sure their name is spelled the same way each time, in order for the sales to count towards the correct client.

* Required fields if you want to use the Sales Velocity Calculator	* Only required if you want to use the Sales Velocity Calculator
03:15 £4,500.00	

Options for the Source of Sales. In

Check		Sale Date	Invoice No.	*Value (Exc VAT)	Job Type (Select)	Client	*Status	Time Used [h]:mm	Cost Price	*Enquiry Start	*Project End	CRX	Facebook	FB Group	LinkedIn
✓	✓	01 May 2018	1	£1,000.00	Large Job	Client 1	Sale	10:00	£800.00	01 May 2018	25 May 2018	50%	50%		
✓	✓	02 May 2018	2	£300.00	Store Product	Client 1	Sale	0:30	£50.00	02 May 2018	30 May 2018				100%
✓	✓	03 May 2018	3	£800.00	Small Job	Client 2	Sale	2:00	£400.00	03 May 2018	06 Jun 2018				
✓	✓	04 May 2018	4	£1,000.00	Large Job	Client 3	Sale	10:00	£800.00	04 May 2018	31 May 2018				50%
✓	✓	07 May 2018	5	£200.00	Store Product	Client 2	Sale	0:15	£50.00	07 May 2018	01 Jun 2018		50%		
✓	✓	08 May 2018	6	£800.00	Small Job	Client 4	Sale	3:00	£400.00	08 May 2018	30 May 2018				
✓	✓	09 May 2018	7	£700.00	Small Job	Client 1	Sale	4:00	£450.00	09 May 2018	11 Jun 2018				
✓	✗	10 May 2018	8	£1,000.00	Large Job	Client 5	Enquiry				27 Jan 1900				
✓	✗	11 May 2018	9	£1,200.00	Large Job	Client 3	Declined				01 Feb 1900		20%		
✓	✓	14 May 2018	10	£900.00	Large Job	Client 5	Sale	6:00	£600.00	14 May 2018	15 Jun 2018	100%			
✓	✓	01 Jun 2018	11	£800.00	Small Job	Client 6	Sale	4:00	£500.00	01 Jun 2018	05 Jul 2018		100%		
✓	✗	04 Jun 2018	12	£1,500.00	Large Job	Client 7	Declined				27 Jan 1900				100%
✓	✓	05 Jun 2018	13	£300.00	Store Product	Client 8	Sale	1:00	£50.00	05 Jun 2018	06 Jul 2018				
✓	✓	06 Jun 2018	14	£200.00	Store Product	Client 7	Sale	0:30	£0.00	06 Jun 2018	28 Jun 2018				
✓	✓	07 Jun 2018	15	£150.00	Addition	Client 9	Sale	3:00	£0.00	07 Jun 2018	29 Jun 2018	100%			
✓	✓	08 Jun 2018	16	£600.00	Small Job	Client 10	Sale	3:00	£200.00	08 Jun 2018	09 Jul 2018			50%	
✓	✓	09 Jun 2018	17	£400.00	Small Job	Client 4	Sale	4:00	£200.00	09 Jun 2018	15 Jun 2018				

You can then capture sales as and when they happen. Simply use a line per sale, and input the necessary details. Date, invoice number, sales value and your client name. You can then make various selections/additions, like the job type, cost price value, and the time taken on the job. You only need to complete any relevant to your business, and your setup lists. All that is left to do it to assign a percentage of the job to any of your sources. For example, you can assign 100% of the job to networking, or you can assign 50% to networking and 50% to LinkedIn, is they both played an equal role to bring the work in. You don't need to assign a sale to a source, but the more you do, the more information you will receive.

Sales for the Month:	£7,900.00
Cost for the Month:	£5,050.00
Time Worked:	58:45

Profit Earned	
	£48.51
Profit / Hour	

Sales Compared to Budget

■ Sales for the Month   ■ Sales Target

Source and Category Breakdowns

Source List	% Allocation	Value
CRX	18%	£1,400.00
Facebook	8%	£600.00
Facebook Group	3%	£240.00
LinkedIn	10%	£800.00
LinkedIn Referral	10%	£800.00
Networking	17%	£1,320.00
Referral	10%	£800.00
Twitter	4%	£350.00
Website	17%	£1,350.00
Other	3%	£240.00

Job Types	% (Sales)	Sales Value	% (Profit)	Profit Value
Addition	0%	£0.00	0%	£0.00
Large Job	65%	£5,100.00	49%	£1,400.00
Small Job	29%	£2,300.00	37%	£1,050.00
Store Product	6%	£500.00	14%	£400.00

That is all you need to do, this report and all the following will automatically calculate as you input the data on previous tabs. This first report is a monthly one. Simply select the month you wish to view, and see a report on that month. You can see how each of your job types and sources compare with each other as far as the job values are concerned. Not only that but you can also see some overall statistics for the month. Lastly, you can also see how you competed against your target for that month. Up to date information regarding your sales, where they came from, and how lucrative they were.

Annual Report for Spreadsheet Solutions
May 2018 - April 2019

Monthly Breakdown

■ Time Worked   ■ Sales   ■ Cost
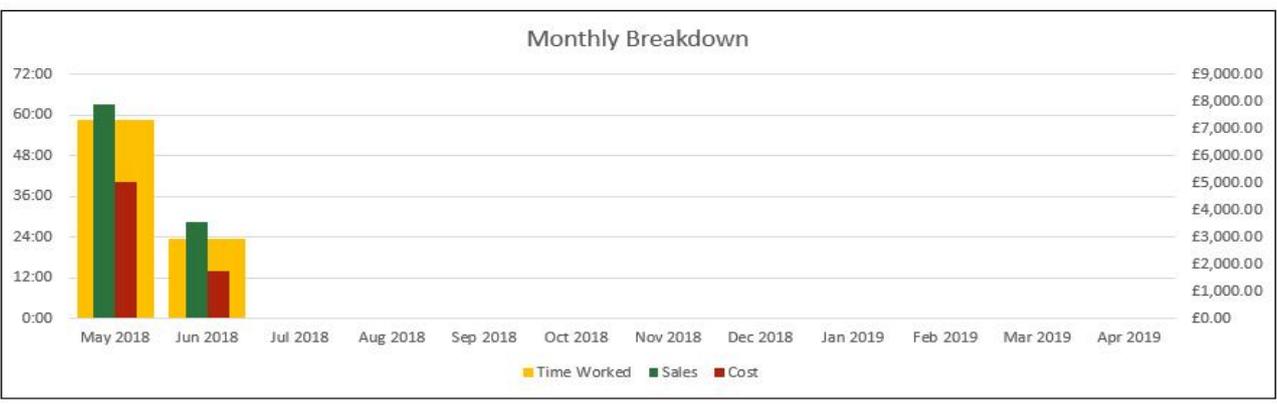
The next report is a comprehensive one, based on all the data for the whole financial year (which you can pre-determine). This first graph shows you your sales, costs of projects/sales and the time worked on them. This allows to see month on month, how these figures compare. Are you making more money and working less? Which months have been busier, and are you earning accordingly? This will show you what you need to know.

Source and Breakdowns & Report

Source List	% Allocation	Value
CRX	14%	£1,550.00
Facebook	12%	£1,400.00
Facebook Group	5%	£540.00
LinkedIn	20%	£2,300.00
LinkedIn Referral	10%	£1,100.00
Networking	14%	£1,620.00
Referral	7%	£800.00
Twitter	5%	£550.00
Website	12%	£1,350.00
Other	2%	£240.00
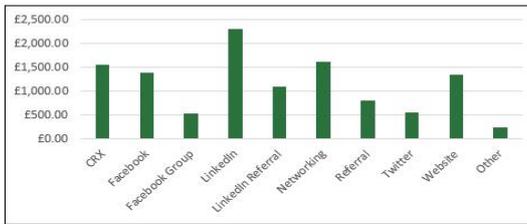
Job Types Breakdown & Report

Job Types	% (Sales)	Sales Value	% (Profit)	Profit Value	Ave Sales / Hour	Ave Profit / Hour	Time Spent
Addition	1%	£150.00	3%	£150.00	£50.00	£50.00	3:00
Large Job	58%	£6,600.00	41%	£1,900.00	£193.19	£32.26	61:00
Small Job	32%	£3,700.00	38%	£1,750.00	£291.67	£120.83	16:00
Store Product	9%	£1,000.00	18%	£850.00	£300.00	£437.50	2:15

You can see the overall value earned from each source, which will enable you to see which ones are worthwhile and which possibly are not. Also, you can see various statistics based on the job type. Which job type brings in the most sales, profits, average profit per hour worked? You can see which job types have been the most lucrative, and which ones to market for in the future. Another table not show here, is the one of the top 10 clients, and what they are worth to you. You can also see a comparison between the product types and referral sources. What jobs came from where.

Select below to ensure you have the right figures

Do you work weekends?	No

Your Calculated Sales Velocity Figures

Opportunities	Ave. Sale Value	% Win Rate	Cycle Days
17	£582.14	82%	20.07

If you would like to see how some simple changes to your figures can influence your sales velocity, simply enter your target figures below.

Your Target Sales Velocity Figures

Opportunities	Ave. Sale Value	% Win Rate	Cycle Days
20	£600.00	82%	15

Current Calculated Sales Velocity
£404.34

Possible Sales Velocity
£656.00

Lastly, there is a sales velocity calculator. Not sure what that is? It is your potential sales x average sale value x success rate / average days to complete a project. This spreadsheet will work yours out for you, and then let you put in some target figures, which will then show you what is possible should you hit those figures. A really good way to see how you can improve your sales.

So there you have it, an overview of this unique product. We can't show you everything in this brochure, so please use the link below to the demo video, should you wish to see exactly how this product works.

All the other links you may need for more information, or to purchase this product, are below.
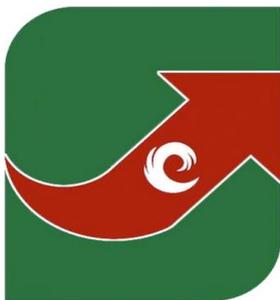
In order to purchase this product, download a free trial, or watch the demo video, please click the image to the left.

This product is sold from the UK, and will be invoiced as GBP. The fee is a once off fee, and there is no monthly charge. There will be an entirely optional annual charge, should you want to receive future upgrades.

£240

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