

18.2 Report Enhancements

New Look

Color and shading have been added to all reports to increase readability.

Cost Range	SALES						INVENTORY				PROFIT				Turn
	%Total	Retail	Units	Days to Sell	Avg. Sale	Avg. Cost	Avg. Units	Curr. Units	Avg. Age	Avg. Investment	Profit	GP%	Mark Down%	GMROI%	
0-179 days old															
\$0-100	20.84	69,610	861	143	81	30	461.4	348	196	15,746	44,168	63	17	280	1.62
\$100-250	19.60	65,495	175	169	374	153	148.4	158	209	24,753	38,724	59	22	156	1.08
\$250-500	15.84	52,928	63	127	840	345	34.7	47	141	13,255	31,186	59	20	235	1.64
\$500-1000	13.53	45,191	30	121	1,506	687	21.0	25	218	16,172	24,576	54	25	152	1.27
\$1000-2500	2.58	8,620	3	84	2,873	1,162	3.4	7	157	4,222	5,133	60	30	122	0.83
Totals	72.39	241,843	1,132	145	214	87	668.9	585	195	74,150	143,788	59	21	193	1.32
180-359 days old															
\$0-100	1.87	6,251	77	453	81	27	67.4	30	649	2,498	4,163	67	14	167	0.84
\$100-250	2.62	8,764	20	499	438	159	25.5	14	646	5,101	5,592	64	19	110	0.62
\$250-500	1.24	4,159	5	303	832	354	3.8	3	650	2,371	2,388	57	25	101	0.75
\$500-1000	0.35	1,181	1	286	1,181	509	0.1	0	0	399	672	57	25	168	1.28
Totals	6.09	20,355	103	453	198	73	96.9	47	642	10,369	12,815	62	19	123	0.73
>= 360 days old															
\$0-100	6.17	20,612	234	1,130	88	32	505.7	381	2,388	15,972	13,096	64	19	82	0.47
\$100-250	2.77	9,256	27	920	343	147	53.4	37	1,171	10,125	5,282	57	20	52	0.39
\$250-500	2.18	7,277	9	923	809	333	28.6	24	1,287	10,890	4,279	59	23	39	0.28
\$500-1000	5.19	17,328	10	939	1,733	749	21.6	16	1,221	17,321	9,839	57	23	57	0.43
\$1000-2500	5.21	17,402	5	788	3,480	1,883	4.9	3	1,018	12,416	7,986	46	12	64	0.76
Totals	21.51	71,874	285	1,091	252	110	614.2	461	2,173	66,725	40,482	56	18	60	0.47

Stone Reporting

Inventory reports now include an option to include stone details. Group/Sort options were also added so items can be grouped & sorted by stone characteristics.

To include stone details on an inventory report:

1. Click **Reports > Inventory** and select any of the **In Stock** or **Sold** reports.
2. Click on the **Stones** tab. Use the **Match Stones by Position** option to determine if you only want to include primary stones, primary and secondary, or all stones. When including more than just primary, an item with multiple stones will appear multiple times – once for each stone.
3. Click on the **Options** tab. There is a new option **Show Stone Details**.

4. Check this option, specify any other desired criteria, and click **OK**.
5. A summary of the stone will be displayed with each item.

Vendor Style #	Type	Description	Count	Age	Cost	Price
Item #	Status					
Category 100: Diamond Engagement Rings						
Stone Shape: Princess						
	DO:ER0600 001-100-05209	Stock In Stock	14kmg Diamond Engagement Ring	364		1,599.00
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1.5; Weight (Max): 1.5						
	DO:ER0600 001-100-05210	Stock In Stock	14kyg Diamond Engagement Ring	660		1,599.00
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1.15; Weight (Max): 1.15						

To Group and Sort by stone characteristics:

1. Click **Reports > Inventory** and select any of the **In Stock** or **Sold** reports.
2. Click on the **Options** tab. In the **Group By...** section you will find the following new options:

Group By...

- Year Entered
- Sale #
- Stone Clarity
- Stone Color
- Stone Shape
- Stone Type
- Stone Weight
- Stone Size
- Cost/Re-Cost

Group/Sort By:

- Stone Clarity
- Stone Color
- Stone Shape
- Stone Type

Sort Only (cannot be checked):

- Stone Weight
- Stone Size

3. The report will be grouped by any option checked. The sort order is determined based on the placement of the option in the list. You can drag & drop an option to the top of the list to sort by it. Sort is honored whether the grouping checkbox is checked or not (not all sort options are groupable).
4. For example, checking **Stone Type** and then dragging & dropping **Stone Weight** to the top of the list will show you a list of items grouped by the shape of stone and sorted by the stone's weight.

Vendor Style #	Type	Description	Count	Age	Cost	Price
Item #	Status					
Stone Shape: Princess						
 DO:ER0600 001-100-05209	Stock	14kvg Diamond Engagement Ring	364			1,599.00
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1.5 ; Weight (Max):						
 DO:ER0600 001-100-05210	In Stock	14kvg Diamond Engagement Ring				1,599.00
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1.15 ; Weight (Max): 1.15						
 DO:ER0600 001-100-05211	Stock In Stock	18kvg Diamond Engagement Ring	691			1,599.00
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1 ; Weight (Max): 1						
 DO:ER0600 001-100-05212	Stock In Stock	14kvg Diamond Engagement Ring	264			1,599.00
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 0.75 ; Weight (Max): 0.75						
Stone Shape: Princess			4	495		6,396.00

5. Note if you do not also check **Show Details** you will get a summarized version of this report.

Vendor Style #	Type	Description	Count	Age	Cost	Price
Item #	Status					
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1.5; Weight (Max): 1.5 (Item #001-100-05209)						
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1.15; Weight (Max): 1.15 (Item #001-100-05210)						
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 1; Weight (Max): 1 (Item #001-100-05211)						
Stone Details: Diamond-Princess; Clarity: SI3; Color: F; Weight: 0.75; Weight (Max): 0.75 (Item #001-100-05212)						
Stone Shape: Princess			4	495		6,396.00

Sales Comparison Report

This report allows you to compare sales made on two separate days. By default, when you enter a **Compare Date** it will auto-fill the **Compare To Date** field with the date for the same day of the week last year.

For example, entering 1/1/2018 will yield a **Compare To Date** of 1/2/2017 as these are both Mondays. You can override the suggested **Compare To Date** with any date you wish.

To run the report:

1. Click **Reports > Managements > Sales Comparison**. The **Sales Comparison Report** window will appear.

2. Specify a date in the **Compare Date** field.
3. **Compare To Date** will auto-fill with the date for the same day of the week from last year. Override this if you wish.
4. Use the checkboxes to indicate whether multi-step transactions should be counted as sales on intake (check the box) or pick up (leave unchecked).
5. Click **OK** to run the report.

	This Day 12/1/2016	This Day 12/3/2015	Day +/-	Week To Date 11/27/2016	Week To Date 12/6/2015	Week +/-	Month To Date 12/2016	Month To Date 12/2015	Month +/-	Year To Date 2016	Year To Date 2015	Year +/-
Sales Amt	22,918	6,520	16,398	87,303	0	87,303	22,918	37,737	-14,819	2,993,056	622,042	2,371,014
Sales %			351%			0%			60%			481%
# of Sales	146	17	858%	432	0	0%	146	57	256%	15,802	3,137	503%
Avg Sale	157	384	40%	202	0	0%	157	662	23%	189	198	95%
COGS	10,776	4,076	6,700	40,217	0	40,217	10,776	17,926	-7,150	1,561,968	398,752	1,163,216
GP Amt	12,142	2,444	9,698	47,086	0	47,086	12,142	19,811	-7,669	1,431,088	223,290	1,207,798
GP %	52%	37%	15%	53%	0%	53%	52%	52%	0%	47%	35%	12%

Columns are shown comparing the specific date along with the value or percentage change. It also gives cumulative data for week to date, month to date, and year to date. Rows include:

Sales Amt Total value of sales. Multi-step transactions such as special orders will be included in this figure on deposit only if you checked the corresponding box on Step 4, otherwise only picked up transactions are included.

Sales % The percentage of change. Green indicates positive change while red indicates negative.

of Sales The number of sales transactions.

Avg Sale The value of the average sale

COGS The total cost of goods sold.

GP Amount The gross profit dollars made.

GP % The gross margin percentage.