

# Tips on TAT Sales Report

## TM CY YTD Sales Compared to LY YTD



June 15, 2016

**Purpose:** The "TM CY YTD Sales Compared to LY YTD" report is a modified and simplified version of the "TM Sales-by-Customer" report that is color-coded (red-green) to indicate sales trends. It can be used to quickly view YTD sales by account and part number and identify what is up or down. Identify problems and sales opportunities, where you need corrective action, areas to investigate and more.

**Scope:** This report includes all YTD sales in the territory where a customer purchased TAT product this year (CY) or last year (LY). Each line of the report indicates sales for a customer and part number purchased.

### Contents of the Report:

TM CY YTD Sales Compared to LY YTD Sales, ran on 6/15/2016										
TM	TM Name	Customer ID	Customer Name	Part Number	LY YTD Qty	LY YTD Sales	CY YTD Qty	CY YTD Sales	Qty Chg	Sales Chg
10	Open CO	301809	NATIONAL OAK DIST.	6401	0	\$10	1	\$55	1	\$45
10	Open CO	301809	NATIONAL OAK DIST.	6417	1	\$14	1	\$22	0	\$8

Column A: TM Number

Column B: TM Name

Column C: Customer ID

Column D: Customer Name

Column E: Part Number

Column F: LY YTD Quantity

Column G: LY YTD Sales \$

Column H: CY YTD Quantity

Column I: CY YTD Sales \$

Column J: Quantity Change (CY – LY)

Column K: Sales \$ Change (CY – LY)

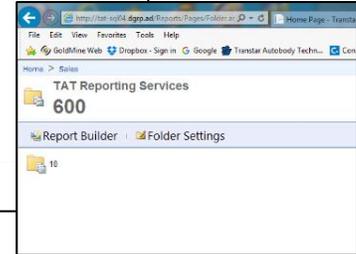
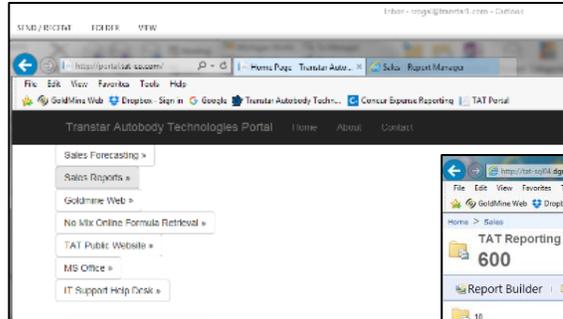
### How to Get a Report:

You can get this report in two ways:

1. Report will be sent via email to all TMs (starting 7/1/16). Sent first Monday of each month.
2. You can run an up-to-date report at any time on the TAT Portal. See instructions below.

**How to Create a Report:**

1. Go to the "TAT Portal"
2. Select "Sales Reports>>"
3. Select & open "your territory folder"
4. Select & open the file – "TM CY YTD Sales Compared to LY YTD"



Report may take a minute to load.

TM Name	Customer	Customer Name	Part Number	LY YTD Qty	LY YTD Sales	CY YTD Qty	CY YTD Sales	Qty Chg	Sales Chg
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6114	18	\$411	16	\$453	0	\$42
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6121A	22	\$913	18	\$471	-12	(\$442)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6124F	18	\$270	12	\$158	-6	(\$112)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6131	9	\$0	6	\$410	6	\$410
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6141	4	\$264	4	\$371	0	\$7
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6143	18	\$170	18	\$107	0	\$63
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6213	36	\$371	60	\$417	24	\$446
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6224	4	\$116	4	\$371	0	\$7
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6228	0	\$160	12	\$36	12	(\$124)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6231	14	\$1,080	18	\$1,165	4	\$85
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6234	0	\$160	12	\$36	12	(\$124)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6244	6	\$160	12	\$36	6	(\$124)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6258	20	\$418	35	\$610	15	\$192
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6267	0	\$0	36	\$291	36	\$291
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6218	2	\$45	0	\$0	-2	(\$45)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6481	22	\$1,261	2	\$13	-20	(\$1,248)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6417	84	\$1,480	42	\$732	-42	(\$748)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6441	8	\$171	14	\$1,068	6	\$897
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6444	6	\$162	6	\$0	0	(\$162)
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6454	12	\$270	16	\$364	4	\$94
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6487	0	\$0	4	\$66	4	\$66
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6441C	8	\$618	16	\$1,148	8	\$530
67 Dinet*	300798	ZIMMERMAN AUTOBODY SUPPLY	6561	4	\$264	10	\$654	6	\$390

Note: If you run the report mid-month, the data will be displayed through the day of the month for like periods – e.g. 6/15/15 YTD and 6/15/16 YTD.

**How to Use the Report – Online / On the Portal:**

The report has limited functionality without exporting it (if you use it on the portal). Here are some tips on how to use this report online.

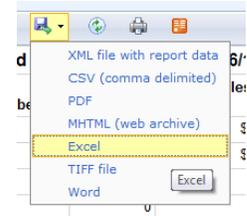
1. In the upper left corner, you can see the page number of the report.
2. To move to the next page in the report, click the single forward arrow ► or back arrow ◀
3. To move to the front or end of the report, click the forward/back arrow with line ►► ◀◀
4. Use the arrows to move through the report and view and analyze sales by part number for each customer.
5. Use the red/green color-code in columns J & K to quickly identify problems and opportunities.



**How to Export the Online Report to Excel:**

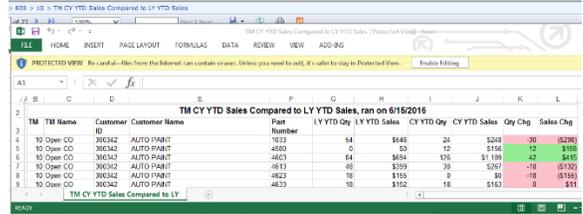
For more functionality, export the report to Excel.

1. In the menu bar at the top of the screen, go to the "disc icon" and click the down arrow. In the dropdown menu, select "Excel."
2. At the bottom of the screen in the yellow bar, click "Open." Report may take a minute to load.



Customer ID	Customer Name	Part Number	LY YTD Qty	LY YTD Sales	CY YTD Qty	CY YTD Sales	Qty Chg	Sales Chg
301809	NATIONAL OAK DIST.	6401	0	\$10	1	\$55	1	\$45
301809	NATIONAL OAK DIST.	6417	1	\$14	1	\$22	0	\$8
301809	NATIONAL OAK DIST.	6454	0	\$1	0	\$0	0	(\$1)
301809	NATIONAL OAK DIST.	6494	0	\$2	0	\$0	0	(\$2)
301809	NATIONAL OAK DIST.	6613	0	\$2	0	\$24	0	\$22

- When the Excel file opens, in the yellow bar at the top of the screen, you may need to click “Enable Editing.”



**Once You Have the Excel Report:**

Whether you receive the Excel report via email or export the report from the TAT Portal, here are a few quick tips.

- Before you begin to work on the file, “Save” the file on your computer. You should have a “Sales Report” folder.
- Begin to analyze the report using the standard Excel functions like sort, filter, etc.
- If necessary refer to the Excel Tip sheet distributed by TAT.
- Analyze the report for issue and trends by customer and product.
- Importantly, identify and prioritize problems that need corrective action and opportunities to exploit.
- Then follow up with action in the field.