Tips on TAT Sales Report
Who Buys What
February 3, 2016

Purpose: This report can be used to view and analyze order history for an account. Identify and analyze what was purchased, when, the quantity and the price. Identify trends, possible gaps and opportunities and more. Improve your service, support and sales to customers.

Scope: You can run a report for any account within your territory from 1/1/15 through the current date. For other reports, contact TAT Customer Service.

How to Create an Online Report:

Step 1: Go to the TAT-Portal. Select "Sales Reports"

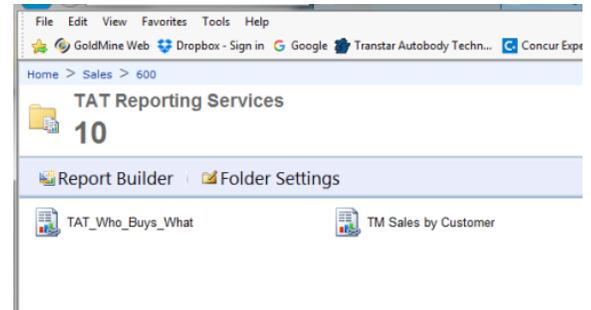**Step 2:** Select your Territory folder

Step 3: Select "TAT_Who_Buys_What"

Step 3: At the top of the screen, for the orders/invoices that you want to view, enter

1) Customer Number – You can enter one or a range of account number. Enter the 6-digit starting & ending number

2) Date Range– Enter the starting & ending for the range of orders/invoices.

3) Item Number –Enter one or a range of part numbers in the starting & ending fields. To view all items purchased by the customer enter: Starting: 0000 Ending: 9999

Step 4: In the upper right corner, click "View Report"

It will take a few moments for the report to load.

How to Export the Report to Excel:

Step 1: In the menu bar at the center of the page, click the "Export" (blue square icon).

Step 2: Select the file format you want – e.g. Excel

You can then work on, edit or manipulate the file.
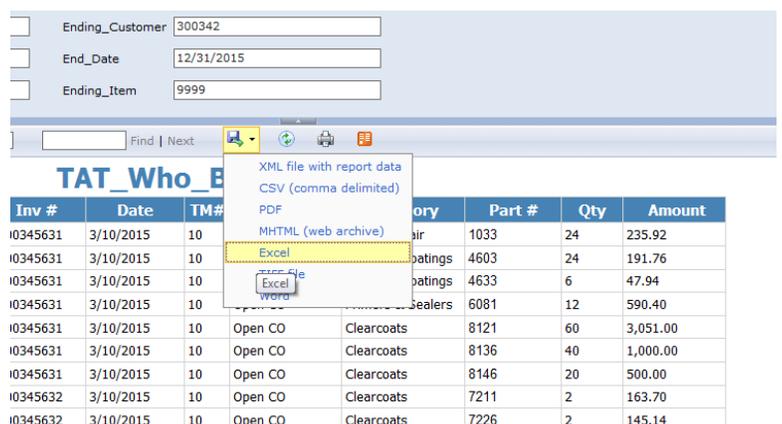
Once You Have the Excel Report:

Once you have created the Excel report, here are a few quick tips.

1. Before you begin to work on the file, "Save" the file on your computer. Use a recognizable, identifiable name and save to a "Sales Report" folder.
2. Depending on your goal(s) in running the report, begin to analyze the report using the standard Excel functions.
3. If necessary refer to the Excel Tip sheet distributed by TAT.
4. If you want *to view and analyze order history* for a single account (depending on how you searched customer number), you may want to first sort on customer name/number, then search on item number.
5. Then *to analyze order history* for a single account, use the sort function and sort on Date, "Qty" or "Amount" in ascending or descending order. This may be useful in identifying buying trends.
6. To determine the average price paid per unit, create a formula – i.e. Amount / Qty. Note this "average price" is based on price in effect at time of purchase, all discounts (e.g. pallet), promotions, etc.
7. Once you have analyzed and synthesized the data and gained insight, follow up with action in the field.