Prebuilt Reports

Information on the prebuilt reports that come with Counterpoint Cloud Platform

- Consolidated Sales
- Historic Sales
- Historic Inventory Report
- Detailed Sales History
- Detailed Inventory History Report
- Clerk Analysis

Consolidated Sales

The consolidated sales report is a web-based equivalent to the Consolidated Sales report provided in COUNTERPOINT. This report lists current YTD sales compared to previous YTD sales, along with Gross profit and a detailed breakout of the previous 4 month's sales.

In addition, the report allows you to filter on specific branches, as well as export to excel with one click.

Historic Sales

The historic sales report focuses on a particular branch, and offers an overview of sales performanc
e for the past 2-
3 years. This includes gross income, net income, and GP% broken down by year and by month.

Historic Inventory Report

The prebuilt historic inventory report contains both a table and graph
The Historic Inventory Table displays the monthly inventory value and percent change for the last 24-36 months.
The Historic Inventory Graph maps the total inventory value at the first of every month for the sele cted branches.

Detailed Sales History

The Historic Category Report breaks down sales for the selected branches by category, breaking ou t their sales as a trend over the past 6 months.

Detailed Inventory History Report

The Historic Category Report breaks down sales for the selected branches by category, breaking ou t their sales as a trend over the past 6 months.

Clerk Analysis

The clerk Analysis report provides a number of metrics on clerk sales performance.

- Number of active clerks - Clerks with sales in the selected filter timeframe
- Clerk Type Breakdown - Currently can be in-store or online
- Online Clerk Breakdown - Breakdown of clerk sales for online clerks (useful if using more than one ecommerce sales platform)
- Store Clerk Breakdown - Breakdown of clerks sales for in-store clerks
- Top clerks by sales - Top 25 clerks by sales dollars
- Detailed clerk breakdown - A detailed table of clerk sales based on the selected filter timeframe