

Daily sales rep email report

This function will allow a daily email to the user based on the default sales rep.

User Management - User Search

Search

Add

Edit

Delete Employee

Clone User

User Leave

Lock Users

Print

Import / Export

Basic Search

Custom Field Search

Login ID:

Employee Name:

Time Log Group:

Staff 35

Consu

#	Att	Incid	Status	Status
1				CheckIn
2				CheckIn
3				All
4				All
5				All
6				All
7				CheckIn
8				All
9				All
10				All
11				All
12				All
13				All
14				All
15				All
16				All
17				All
18				All

Edit Employee Info

Employee Management

Attachments

Restrict Access

Set Password

Incident

Functions

Details 1

Details 2

Module Access

Address

Account Details

User Fields

Email

Email Type:

HTML

PDF

Email Signature:

Regards
Malcolm
Huge ERP

Email Provider:

None

User Name:

Password:

No Email On Purchases:

ScanSKU Email:

Default Debtor T/L:

User Signature Image:

Use the following general email addresses from for documents.:

Debtor from Email:

Creditor from Email:

Quote:

RFQ:

Invoice:

Purchase Order:

Credit Note:

Send Daily sales report

Save

Close

Daily email summary

March Month to date sales figures - Malcolm Granville



servic

To: Service



MonthlySalesMalcolm .xlsx
6 KB

Huge Software - Malcolm Granville

Please see attached month to date sales report

Total sales month to date = 82,000.00

Total sales year to date = 356,000.00

Total Quotes open for month = 13,000.00

Total sales orders open for month = 0.00

Total credit note value processed for month = 1,890.50

Last year month to date sales = 102,500.00

Variance from last year = (20,500.00)

Last year sales year to date = 832,000.00

Report attached by Brand for Sales rep

Report output

Sales by Brand					Year to Date			
Brand	Month				Year to Date			
	Current Actual MTD	LY MTD	MTD Variance	MTD Var %	Current Actual YTD	LY YTD	YTD Variance	YTD Var %
MycroKeratin								
Myoyoko								
Eleven								
Totals								
	Invoices less credit notes in current period	Invoices less credit notes same period last year	Current MTD less LY MTD	MTD Variance divided by LY MTD as %	Invoices less credit notes in current YTD	Invoices less credit notes YTD period last year	Current YTD less LY YTD	YTD Variance divided by LY YTD as %

Enable the email schedule to check each user that has the tick activated

Edit Company Profile Info

Attachments Print Generic Naming Defaults Functions Close

Basic Settings Advanced Settings

Settings GL Links Stationery Asset Support Logs Custom Fields

Decimal Places

Debtors Cost Value:

Creditor Cost Value:

Inventory Cost Value:

Debtors Sell Value:

GL Decimal Values:

Debtors Settings

Password Expiry:

Allow GRV Item to Asset Man.:

Allow Quote to Debtor leads:

Block SO:

Manage Task Scheduling

 Schedule Setup

Days Prior: Day

GST Category:

Tax Reporting Method:

VSDC ID:

Save Close

Scheduled Tasks Search

Add Schedule Edit Schedule Delete Schedule View Schedule Tasks Log Start Schedule Stop Schedule

Page 1 of 1 Displaying 1 - 43 of 43

#	Task Name	Task Code	Active	Status	Email List	Recipients	Run Now
1	API Stock import	API Stock import		Has not been schedul...			
2	Asset Tracker Send Available Ret...	AssetTrackerSendAvailableReturn...		Has not been schedul...			
3	Asset Tracker Send Available Vehi...	ATSendVehSvcDueEmails		Has not been schedul...			
4	Auto Badger Import	Auto Badger Import		Has not been schedul...			
5	Auto Bulk Emailing Processed Inv...	Auto Bulk Emailing Processed Inv...		Has not been schedul...			
6	Automatic Invoice Processing	Automatic Invoice Processing		Has not been schedul...		1	
7	Below Max Level Report	Below Max Level Report		Has not been schedul...			
8	Below Min Level Report	Below Min Level Report		Has not been schedul...		1	
9	Below Preferred Qty Level Report	Below Preferred Qty Level Report		Has not been schedul...			
10	Below Re-Order Level Report	Below Re-Order Level Report		Has not been schedul...			
11	Cancel Expired Quotes	Cancel Expired Quotes		Has not been schedul...			
12	Cancel TrackIT Warranty	Cancel TrackIT Warranty		Has not been schedul...			
13	Change Recurring Transaction St...	Change Recurring Transaction St...		Has not been schedul...		1	
14	Check PO To GRV Intervals	PO_GRV		Has not been schedul...			
15	Check PO To GRV Intervals	PO_GRV		Has not been schedul...			
16	Creditors Payment Batch Update	Creditors Payment Batch Update		Has not been schedul...			
17	Daily Sales Rep Sales Email	Daily Sales Rep Sales Email		Has not been schedul...			
18	Daily Inventory Group Value Report	Daily Inventory Group Value Report		Has not been schedul...			
19	Daily Inventory Valuation Report	Daily Inventory Valuation Report		Has not been schedul...			
20	Daily Stock Control Report (WIP ...	Daily Stock Control Report (WIP ...		Has not been schedul...		1	
21	Daily Time Log Figures	Daily Time Log Figures		Has not been schedul...			

Revision #2

Created 1 April 2026 02:23:02 by Malcolm

Updated 1 April 2026 02:43:42 by Malcolm