Sales Rep Reporting Module

Sales Rep Reporting provides sales representatives with real-time visibility of their sales performance through an intuitive dashboard. Monitor revenue, track customer activity, analyse sales trends, compare year-on-year results, and identify top-performing accounts from a single location. With instant access to key metrics and customer insights, sales teams can measure performance, uncover new opportunities, strengthen customer relationships, and make more informed decisions to drive business growth.

Key features include:

- **Personalised Dashboard** displaying key sales metrics and performance indicators.
- **Monthly Revenue Tracking** with progress against revenue targets and budgets.
- **Customer and Invoice Statistics**, providing an overview of active customers, invoice volumes, and sales values.
- **Revenue Trend Analysis** with graphical reporting to track sales performance throughout the year and identify seasonal trends.
- **Customer Performance Reporting**, showing year-to-date sales, previous year comparisons, growth percentages, and top-performing customers.

- **Year-on-Year Comparisons** to quickly identify business growth opportunities and customer spending patterns.
- **Sales Performance Visibility** allowing representatives to monitor their own portfolio and focus on key accounts.
- **Real-Time Reporting** ensuring access to the latest sales information without the need for manual spreadsheet analysis.

The module provides sales teams with the information they need to better manage customer relationships, monitor performance, and make informed decisions based on accurate sales data.

Customer Sales Analysis allows sales representatives to drill down into individual customer accounts and gain deeper insight into purchasing behavior and sales performance. View customer revenue, analyse sales trends, compare year-on-year growth, and review purchases by brand or product category. With access to detailed customer information and performance metrics in a single screen, sales teams can identify new opportunities, strengthen customer relationships, and make more informed account management decisions.

Key features include:

- **Customer Profile View** displaying contact information, email address, and phone number for quick access.
- **Year-to-Date Revenue Summary** showing total sales generated by the customer, along with year-on-year growth comparisons.
- **Customer-Specific Sales Trends** presented in graphical format to highlight purchasing patterns and seasonal fluctuations throughout the year.
- **Sales by Brand Reporting** breaking down purchases by product category, brand, SKU, or description.
- **Year-on-Year Performance Analysis** for each product group, helping identify growth opportunities and changes in buying behavior.
- **Search and Filter Functionality** allowing sales representatives to quickly locate specific products, brands, or sales activity.

- **Direct Customer Communication** options, enabling sales staff to contact customers directly from the profile screen.

This detailed customer view helps sales representatives identify growth opportunities, understand purchasing trends, and strengthen customer relationships through more informed account management.

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