Name of Report in **SALES REPORTS**	Default Visibility	Default Team Comms Visibilty	Time frame on report	Highlights/Purpose	Suggested uses	Hints, Tips & Caveats
Customer Details	Yes	Yes	Month referenced only	Line by line of each sale that can be grouped by rep, by manufacturer, by sales team.	This could be helpful to cross-reference or troubleshoot any reconciling for commissions payout or sales numbers in general.	Has variety of sort views. Requires customer name for look up. Will only show sales of the person logged in for any sales team they are on.
Customer Summary	Yes	Yes	Month referenced only	Lists by customer monthly sales summary. The only report where you can find "Summarize by Parent Company."	Reference to totals for that customer for that month.	Has variety of sort views. Requires customer name for look up. Will only show sales of the person logged in for any sales team they are on.
Product Details	Yes	Yes	Month referenced only	With a part number to reference, find all sales of that part# by customer or distributor.	Ideal for tracking current sales and which distrubutor also buys/sells that part.	Requires part number for look up.
Product Sales History	No	Yes	Annual to date	Multiple views for comparing history, pricing and customers who purchased that part.	To indentify gaps in frequency, price fluctuations, or missed opportunities with distributors and increase sales through corrections in those areas.	Has variety of sort views.
Sales by Month	No	Yes	Annual to date	Chart of all sales by month by manufacturer.	Check annual progress in a month-by-month view.	These numbers are based on the invoice dates that fall in the range of the month referenced.
Sales Comparison	No	Yes	Annual to date	Compares month and YTD to previous year numbers.	See gains in dollars and percent for comparative time frames.	Can be run for last year or previous 12 months and be sorted by manufacturer, customer, distributor or sales team.
Credited Sales Report	No	Yes	Annual to date	Shows sales amount credited to primary and secondary customer sales rep teams.	To confirm if designers/builder 70/30 splits, part number splits took hold and credited a portion to the secondary customer account.	There are three places to set the split - application settings, in aliasing when the relationship is assigned for "commission split" and through part number exceptions.
Manufacturer Page	No	Yes	Month referenced only	Shows color coded for actual vs. goals followed by top 10 customers and top distributors.	Summary of overall account to review and create action plans to reach goals.	To change the order of the Top 10 customers from highest current annual sales to alphabetical, click blue arrows in column header.
Line Overview	No	Yes	Annual to date	Color Key on health of sales. Lists sales in order of highest current annual sales first.	Easy to use to run a sales meeting for high- level overview without revealing actual company revenue values.	Click to dive deeper on colored square or blue word. The click through on a company name presents the Manufacturer Page report.
Plans Vs Actual	No	Yes	Annual to date	Tracks current sales in relation to manufacturer goals for the year. Color coded.	Tool for internal quarterly business reviews and team goal setting.	Requires set up of Manufacturer forecasts in Dashboard > Data Management.
Sales Analytical Summary	No	Yes	Annual to date	Color Key on health of sales. Lists sales in order of highest current annual sales first.	Easy to use to run a sales meeting for high- level overview without revealing actual company revenue values.	Click to dive deeper on colored square or blue word. The click through on a company name presents the Manufacturer Page report.

Name of Report in COMISSION REPORTS	Default Visibility	Default Team Comms Visibilty	Time frame on report	Highlights/Purpose	Suggested uses	Hints, Tips & Caveats
Sales Rep Summary	Yes	Yes	Time frame referenced only	Sales and commission summarized by manufacturer.	Report to use for sales rep total at month end.	Check "sales team" in upper right corner. The default is to include commission earned for all the sales teams the rep is on.
Sales Rep Details	Yes	Yes	Time frame referenced only	Line by line, each sale and commission for sales rep.	Report to use for sales rep total at month end if details are required at line-item or invoice level.	Check "sales team" in upper right corner. The default is to include commission earned for all the sales teams the rep is on.
Sales/Comm by Month	No	No	Annual to date	Chart of all commissions by month by manufacturer with the total of invoices/sales compensated for in that check.	**Use immediately after completing a commissions import to affirm accuracy of import and posting.**	The commission value is raw and should match the check amount. The sales on the upper row may fall in different months than the actual check date. This combination view allows you to check verbatim numbers on the report and check in one place.
Sales/Comm Comparison	No	No	Annual to date	Comparison of period specified with sales on the left and commissions on the right. Includes current year to prior year. This is the only report that offers average commission rate.	Helpful for accountability on growth per line.	To see an average of commission received by commission RATE - this is the only report to pull that from.
YTD Sales Comparison	No	No	Annual to date	Customer, distributor, previous year, current year, last year to date and year to date firm commission are listed here.	Helpful for accountability on growth per customer and distributor.	It could be used if your fiscal year is not aligned to calendar year. In other words, you could pull this report October - September if a principal wants to know the numbers according to their fiscal calendar.
Line Overview	No	No	Annual to date	Color Key on health of account. Lists in order of highest current annual sales first.	Easy to use to run a sales meeting for high- level overview without revealing actual company revenue values.	Click to dive deeper on colored square or blue word. The click through on a company name presents the Manufacturer Page report listing commissions brought in from that manufacturer.
Commission Expanded	No	No	Annual to date	Lists by month and by manufacturer commissions- only numbers.	One way to see by sales team their monthly and year-to-date earnings.	Looks like the sales by month report, except this is commissions only. Also, similar to Sales/Comms by month which lists both commissions and sales together.
Commission Summary	No	No	Time frame referenced only	Sales, commission and company split summarized by manufacturer. Can be run by rep or sales team.	Report to use for sales rep total at month end.	Has variety of sort views. Will only show sales of the person logged in for any sales team they are on. Does include company split so it is typically not shared with reps.
Commission Details	No	No	Time frame referenced only	Line by line, each sale and commission with company split. Can be grouped by rep, manufacturer, or sales team.	This could be helpful to cross-reference or troubleshoot any reconciling for commissions payout or sales numbers in general.	Has variety of sort views. Will only show sales of the person logged in for any sales team they are on. Does include company split so might not be ideal for sharing with rep if that is a concern. Also shows a column for Paid as yes or no. This tool is for audit pruposes only and is triggered line by line from the Commission Data Overview table column for paid. The default is no so it can be ignored on company reports. This report is generally not shared with reps.