

# Sales Summary Report Guide

The Sales Summary report (accessed through the Ticket screen) provides you with an up-to-the-minute summary of business activity. It is typically used for coaching and monitoring key indicators because it calculates measurements for both the location as well as individual service team members.

## When to create the report

We recommend reviewing this report daily, weekly and monthly.

## How to create the report

1. From the SalonBiz/SpaBiz menu bar, click on the Ticket icon.
2. Click the Summary button.
3. Select either All Staff or Single Staff from the Report View field.
4. Enter the beginning and ending date.
5. Click the Calculate All button to generate the report.

## What it tells you

The report is separated into 4 main areas:

### Payment Summary Tab

- Payments - the types of payment that were used

### Sales Summary Tab

- Sales - a summary of sales by type, quantity and dollar amount
- Gift Certificate, Product, Series and Service Totals - the summary of items sold in each category
- Discounts - the discounts applied to any item sold
- Product and Service Sales by Category - a detailed view of all product and service category sales

### Ticket Summary Tab

- Ticket Statistics - ticket quantities on key indicators
- Percentages - ticket percentages on key indicators
- Ticket Averages - averages that assist in measuring your business
- Customers - the amount of tickets for new, returning and walk-in customers

### Productivity Summary

- Staff Productivity - calculates scheduled hours, available and booked hours, and calculates the percentages

## How it's used

This is used in analyzing your overall business' key growth drivers. It is also a key coaching report for your team.



**Payment Summary for 4/1/2008 to 4/30/2008**

Payment Type	Starting Balance	Payment Quantity	Payments Received	Change Out	Drawer Entry	Estimated Drawer Total	Your Count	Over Short	Next Day Starting Cash	Deposit
Cash	\$4,407.73	239	\$14,306.41	(\$2,253.79)	(\$75.93)	\$16,384.42	\$16,288.20	(\$96.22)	(\$100.00)	\$11,888.20
Check	\$0.00	239	\$22,714.71	\$0.00	\$500.00	\$23,214.71	\$23,214.71	\$0.00	\$0.00	\$23,214.71
Store Credit	\$0.00	49	\$1,421.80	\$0.00	\$0.00	\$1,421.80	\$1,421.80	\$0.00	\$0.00	\$0.00
Cust Owes	\$0.00	1	\$159.20	\$0.00	\$0.00	\$159.20	\$159.20	\$0.00	\$0.00	\$0.00
Gift	\$0.00	48	\$2,236.36	\$0.00	\$0.00	\$2,236.36	\$2,236.36	\$0.00	\$0.00	\$0.00
Visa/Mc/	\$0.00	1,058	\$87,436.33	\$0.00	\$306.60	\$87,742.93	\$87,578.93	(\$164.00)	\$0.00	\$0.00
Amex/Discover	\$0.00	147	\$15,168.25	\$0.00	\$0.00	\$15,168.25	\$15,168.25	\$0.00	\$0.00	\$0.00
Series	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
No Charge	\$0.00	12	\$897.89	\$0.00	\$0.00	\$897.89	\$897.89	\$0.00	\$0.00	\$0.00
Donation	\$0.00	4	\$151.11	\$0.00	\$0.00	\$151.11	\$0.00	(\$151.11)	\$0.00	\$0.00
Awards	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Masterbill	\$0.00	0	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Totals</b>	<b>\$4,407.73</b>	<b>1,797</b>	<b>\$144,492.06</b>	<b>(\$2,253.79)</b>	<b>\$730.67</b>	<b>\$147,376.67</b>	<b>\$146,965.34</b>	<b>(\$411.33)</b>	<b>(\$100.00)</b>	<b>\$35,102.91</b>

[Payment Detail](#)**Payable / Receivables**

	Qty	Payables	Receivables
Customer Owes	1		\$159.20
Store Credits	49		\$1,421.80
Promo Credits Redeemed	0		\$0.00
Gift Certificate Net Purchases	16	\$1,058.20	
Gift Recharge Net Purchases	0	\$0.00	
Gift Certificates Redeemed	48		\$2,236.36
Series Net Purchases	0	\$0.00	
Series Redeemed	0		\$0.00

**Sales Summary for 4/1/2008 to 4/30/2008****Service Sales**

	Quantity	Amount
Service Gross Sales	2,550	\$112,432.00
- Service Discounts	170	(\$2,058.58)
<b>Service Net Sales</b>		<b>\$110,373.42</b>

**Product Sales**

	Quantity	Amount
Product Gross Sales	1,767	\$29,630.39
- Product Discounts	145	(\$1,185.00)
<b>Product Net Sales</b>		<b>\$28,445.39</b>

<b>Total Product &amp; Service Net Sales</b>		<b>\$138,818.81</b>
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	Amount
<b>Total Gross Sales</b>	<b>\$143,129.39</b>
<b>Total Discounts</b>	<b>(\$3,252.38)</b>
<b>Total Net Sales</b>	<b>\$139,877.01</b>

Tips	\$0.00
Tax	\$2,346.26
<b>Total Tax &amp; Tips</b>	<b>\$2,346.26</b>

[Product & Service Sales by Category](#)

**Miscellaneous**

	Quantity	Amount
Gift Certificate Gross Purchases	16	\$1,067.00
- Gift Certificate Discounts	0	(\$8.80)
<b>Gift Certificate Net Purchases</b>		<b>\$1,058.20</b>

Series Gross Purchases	0	\$0.00
- Series Discounts	0	\$0.00
<b>Series Net Purchases</b>		<b>\$0.00</b>

Membership Gross Sales	0	\$0.00
- Membership Discounts	0	\$0.00
<b>Membership Net Sales</b>		<b>\$0.00</b>

Gift Recharge Gross Purchases	0	\$0.00
- Gift Recharge Discounts	0	\$0.00
<b>Gift Recharge Net Purchases</b>		<b>\$0.00</b>

**Product and Service Sales By Category for for 4/1/2008 to 4/30/2008**

<b>Product Categories</b>	<b>Category Quantity</b>	<b>Category Gross</b>	<b>Category Discount</b>	<b>Category Net Sales</b>	<b>Category % of Total</b>
Armstrong Mccall	2	\$34.50	(\$2.25)	\$32.25	0.11%
Aveda	21	\$326.70	(\$25.60)	\$301.10	1.06%
Aveda Christmas	1	\$75.00	\$0.00	\$75.00	0.26%
Aveda Discontinued	22	\$236.50	(\$5.50)	\$231.00	0.81%
Aveda Haircare	1,121	\$20,281.00	(\$690.64)	\$19,590.36	68.87%
Aveda Makeup	140	\$2,135.00	(\$87.81)	\$2,047.19	7.20%
Aveda Personal Blends	39	\$589.50	(\$28.00)	\$561.50	1.97%
Aveda Skin/Body Care	186	\$3,633.25	(\$137.60)	\$3,495.65	12.29%
Denman	17	\$221.00	(\$21.90)	\$199.10	0.70%
Good Home	3	\$58.50	(\$10.22)	\$48.28	0.17%
Hunter Enterprises	13	\$1,604.87	(\$174.24)	\$1,430.63	5.03%
Intellignet Nutrients	10	\$50.00	(\$1.00)	\$49.00	0.17%
Pro Aveda Haircare	25	\$250.47	\$0.00	\$250.47	0.88%
Pro Aveda Skin And Body	5	\$85.90	\$0.00	\$85.90	0.30%
Pro Hair Support	16	\$19.20	(\$0.24)	\$18.96	0.07%
Retail_Edge	145	\$15.00	\$0.00	\$15.00	0.05%
Sentire Explore	1	\$14.00	\$0.00	\$14.00	0.05%
<b>Category Totals</b>	<b>1,767</b>	<b>\$29,630.39</b>	<b>(\$1,185.00)</b>	<b>\$28,445.39</b>	<b>20.49%</b>

<b>Service Categories</b>	<b>Category Quantity</b>	<b>Category Gross</b>	<b>Category Discount</b>	<b>Category Net Sales</b>	<b>Category % of Total</b>
Color	537	\$37,238.00	(\$641.58)	\$36,596.42	33.16%
Design & Style	1,330	\$65,142.00	(\$1,187.59)	\$63,954.41	57.94%
Facial	48	\$3,150.00	(\$22.00)	\$3,128.00	2.83%
Hair Removal	167	\$3,234.00	(\$52.80)	\$3,181.20	2.88%
Hair Treatment	1	\$82.00	\$0.00	\$82.00	0.07%
Lash And Brow Tint	10	\$150.00	(\$3.00)	\$147.00	0.13%
Make Up	6	\$295.00	(\$85.00)	\$210.00	0.19%
Massage	1	\$60.00	\$0.00	\$60.00	0.05%
Models	60	\$15.00	\$0.00	\$15.00	0.01%
New Artist Color	34	\$1,245.00	(\$28.00)	\$1,217.00	1.10%
New Artist Cut	96	\$1,821.00	(\$38.61)	\$1,782.39	1.61%
Retail	260	\$0.00	\$0.00	\$0.00	0.00%
<b>Category Totals</b>	<b>2,550</b>	<b>\$112,432.00</b>	<b>(\$2,058.58)</b>	<b>\$110,373.42</b>	<b>79.51%</b>
<b>Grand Totals</b>	<b>4,317</b>	<b>\$142,062.39</b>	<b>(\$3,243.58)</b>	<b>\$138,818.81</b>	<b>100.00%</b>



**Productivity Summary for 4/1/2008 to 4/30/2008**

Staff	Book Name	Hours	Hours	Hours	%		
		Scheduled	Available	Booked	Available	% Booked	% Open
C	ASST	133.50	154.50	22.25	115.73%	14.40%	85.60%
C	ASST	172.00	164.00	32.00	95.35%	19.51%	80.49%
Jenn	JENNY	137.00	130.00	27.00	94.89%	20.77%	79.23%
Char	CHAR	177.00	172.75	147.75	97.60%	85.53%	14.47%
Craig	CRAIG	170.00	150.50	137.25	88.53%	91.20%	8.80%
Danielle		177.00	(110.25)	134.50	-62.29%	-122.00%	0.00%
Summer	SUMMER	177.00	133.25	132.25	75.28%	99.25%	0.75%
Ashley		136.00	0.00	0.00	0.00%	0.00%	0.00%
Sarah	SARAH	137.00	119.50	21.75	87.23%	18.20%	81.80%
Lacey	LACEY	177.00	37.00	30.50	20.90%	82.43%	17.57%
Ashleigh	ASHLEIGH	137.00	129.75	19.75	94.71%	15.22%	84.78%
Audrey		177.00	72.00	55.00	40.68%	76.39%	23.61%
Lisa	LISA	175.00	130.75	111.50	74.71%	85.28%	14.72%
Lyndsay	LYNDSAY	177.00	64.00	50.50	36.16%	78.91%	21.09%
Carrie	CARRIE	177.00	158.75	138.50	89.69%	87.24%	12.76%
Lauren	LAUREN	177.00	161.75	131.25	91.38%	81.14%	18.86%
Pat	PATSY	186.00	171.25	125.75	92.07%	73.43%	26.57%
Simone	SIMONE	173.00	171.75	125.75	99.28%	73.22%	26.78%
C	CORBIN	170.00	176.75	160.00	103.97%	90.52%	9.48%
Bill	BILL	0.00	2.25	3.25	0.00%	144.44%	-44.44%
Andrea	ANDREA	177.00	179.75	168.00	101.55%	93.46%	6.54%
X	SHARON	0.00	0.00	0.00	0.00%	0.00%	0.00%
X		0.00	0.00	0.00	0.00%	0.00%	0.00%
X	KIM	0.00	0.00	0.00	0.00%	0.00%	0.00%
<b>Entire Salon</b>		<b>3,319.50</b>	<b>2,370.00</b>	<b>1,774.50</b>	<b>71.40%</b>	<b>74.87%</b>	<b>25.13%</b>