

Performance by User

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by User (Salesperson). This list is based on the data you have set up in the [Update Users](#) menu. This report can also be used to calculate commission.

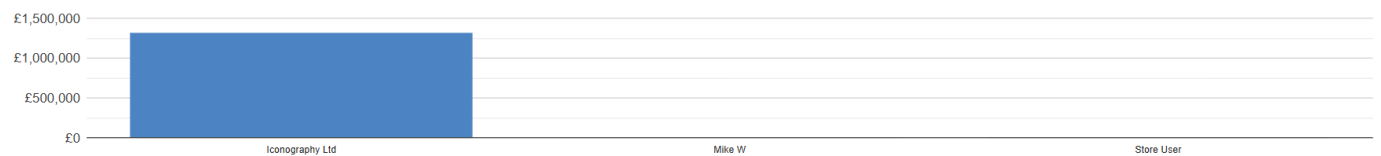
Sales Orders can each be attributed to a single Salesperson. This can be edited within the Sales Order management screen.

Sales Orders without a Salesperson will be omitted from this report.

Performance By User

Source: All Device: All Store: ALL Specify dates from: 23/03/2025 to: 23/03/2026 Update Reset

Download report as CSV Note: Commission is calculated by items sold. *Items Cancelled* does not include same day cancellations. Postage is not included. All discounts are included.



By User	Store	New Orders	New Sales Value	Average Profit Margin	Items Sold Total	Items Cancelled	Items Returned	Discounts	Adjusted Revenue	Commission Earned
Iconography Ltd	UK Warehouse	405	£1,325,172.94	51%	£1,354,274.97	£-3,879.31	£-23,334.23	£-1,489.36	£1,325,572.07	£66,303.98
Mike W	UK Warehouse	1	£5.00	4%	£5.00	£0.00	£0.00	£0.00	£5.00	£0.50
Store User		1	£21.00	22%	£21.90	£0.00	£0.00	£-0.90	£21.00	£1.05

Data Explanation

This report is split into two sections; 'sales data' and 'adjusted sales data'

Sales Data

This section of the report performs exactly like a standard Sales Report (see ['what is a sale?'](#)). This includes:

Field	Purpose
New Orders	Total number of new sales orders, e.g. sales orders created within the selected date range
New Sales Value	Total value of those new sales orders, e.g. sales orders created within the selected date range

Field	Purpose
Average profit margin	Average margin on those new sales orders, e.g. sales orders created within the selected date range

Adjusted Total

These figures to the right of the first dividing line are *adjusted figures*; that means that they have been adjusted to take into account changes on a line by line basis. Rather than reflecting the Sales Order date, these figures reflect the date against the Sales Order line.

For example, a £1000 widget is sold on the 1st of May, creating a new Sales Order. On the 1st June, a second widget is added for £1000. The total value of that Sales Order is £2000, but it would only show as a new Sales Order on a report run on May's sales figures. If the report were run for June, the second widget would be included under 'items sold total'.

Field	Purpose
Items sold total	Total value of items sold within the period, based on 'date added' as stored against each Sales Order line <div style="border-left: 2px solid orange; padding-left: 10px; background-color: #fff9e6;"> <p>This is not based on the sales date of the Sales Order</p> </div>
Items cancelled	Total value of items cancelled against Sales Order where 'date cancelled' (stored against the Sales Order line) is within the selected date range
Items returned	Total value of items returned against Sales Order where 'date returned' (stored against the Sales Order line) is within the selected date range
Discounts	Total value of discounts on Sales Order lines where 'date added' (stored against the Sales Order line) is within the selected date range
Adjusted Revenue	The sum of the preceding columns

Commission

This column shows the commission due to each Sales Person.

Please ensure that you have spoken to Iconography to setup your commission rules

Commission is calculated user the commission rate set against each user in the [Update Users](#) screen:

1. As a percentage of the value of items sold

The commission for this period will be calculated as a percentage of the total value of items sold during the specified timeframe. However, deductions will be applied for any items that were either returned or cancelled within the same period. These deductions will be based on the data reflected in the 'Cancelled' and 'Returns' columns of the report. The final commission amount will be adjusted accordingly to ensure it reflects only completed and successful sales.

The report will be adjusted appropriately for items returned/cancelled during that time period for all orders, regardless of when they are placed.

2. As a percentage of the value of items delivered

The commission for this period will be calculated as a percentage of the total value of items delivered during the specified timeframe, based on the delivery date. Deductions will be made for any items that were returned within the same period, as indicated in the 'Returns' column of the report. The final commission amount will be adjusted to reflect only those sales where the items were successfully delivered and not returned.

The report will be adjusted appropriately for items returned during that time period for all orders, regardless of when they are placed.

3. As a percentage of the value of payments

The report will be adjusted appropriately for refunds during that time period for all orders, regardless of when they are placed.

Returns, Refunds, Cancellations and Clawbacks

Sales Data:

1. Orders within the Period

- **Order 1:** Placed on **1st September**, delivered on **5th October**, total value: **£100**
- **Order 2:** Placed on **3rd October**, delivered on **7th October**, total value: **£150**
- **Order 3:** Placed on **10th October**, delivered on **12th October**, total value: **£200**

1. Returns within the Period:

- **Return for Order 1:** The customer returned the item on **20th October** (also within the report period).
- **Return for Order 2:** The customer returned the item on **15th October** (within the report period).
- **Cancellation for Order 3:** The customer changed their mind, and cancelled the original line item, and added a new one in a different colour on the **10th October**; the original line is counted neither as a sale, nor as a cancellation, as it was cancelled on the same day it was added to the order. The new line is counted as normal.

2. **Commission Calculation:**

- Let's say the commission rate is **10%**.
- The total sales amount for the period (1st October - 20th October) is:
£100 (Order 1) + £150 (Order 2) + £200 (Order 3) = **£450**.

3. **Deductions for Returns:**

- Since both **Order 1** and **Order 2** were returned within the reporting time period, their values will be deducted from the commission total.
- Total returns: £100 (Order 1) + £150 (Order 2) = **£250**.

4. **Adjusted Sales for Commission:**

- Adjusted sales amount = £450 (total sales) - £250 (returns) = **£200**.

5. **Commission Earned:**

- Commission = 10% of £200 = **£20**.

In this example, even though **Order 1** was placed in September and **Order 2** was placed earlier in October, but both of their returns fall within the specified period (1st October - 20th October). As such, they are deducted from the total sales before calculating the commission. The commission earned would be **£20**.

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Filters

This report may be filtered by:

- Source
- Device
- Store
- Date Range

Key to icons

 = view sales from this User in the [Sales by Category](#) report (matching any other filters applied)

 = download report

For more information on margin calculation, click [here](#)

FAQs

FAQs for Sales Reports may be viewed [here](#).

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