

# Sales Reports

Reports that cover sales, revenue and commission.

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# FAQs

## Sales and Revenue

### What is a 'Sale'?

The Sales Reports report on revenue generated on a specific date. Revenue is defined as the total value of an order, including all Products, Addons, Discounts and Delivery.

Revenue is separate to payments, which are reported on separately under Payment Reports.

### Which Orders and Order Lines will form part of revenue reporting?

Orders with the following statuses are excluded from revenue reporting:

- Draft
- Quote
- Abandoned

In addition, Order Lines with the following statuses are ignored (as they value will have been set to £0.00)

- Cancelled
- Returned

## Real Time Data

### Are the reports up to date?

All reports show a snapshot of data at the instant that they were generated. As such, they are always up to date.

# The value of a Sales Order has changed; how will this be reflected in the reporting?

With the exception of Sales by User, all revenue reporting is done based on the Sales Order date. That means that a Sales Order that has a date of the 1st of October will always report its revenue as the 1st of October, even if new lines are added on the 1st November.

# The Salesperson on a Sales Order has changed; how will this be reflected in the reporting?

This will immediately update and change all reports. This will adjust how reports are filtered, and will also have a direct impact on the Sales by User report.

# The Store on a Sales Order has changed; how will this be reflected in the reporting?

This will immediately update and change all reports. This will adjust how reports are filtered, and will also have a direct impact on the Sales by Channel report.

# What happens if a Product is deleted?

Some information is stored against the Sales Order, and IXO Commerce will report on that; other data is stored only against the product. This is done via a lookup of the product, and if that product has been deleted then it will not be possible to report on that data.

Stored against the Sales Order

- Sales Date
- Store
- User
- Source
- Payments
- Selling Price
- Cost Price
- Product Name

- Product SKU

Stored against the Product

- Brand Associations
- Category Associations
- Collection Associations
- Supplier Associations

## Example

A product is sold in May for £10 at a cost price of £5. That product was a Lego Boat, associated with the Lego Brand.

If that product is deleted, then the association with the Lego Brand will also be deleted. This means that while the selling price and cost price are still reportable (as data that is held against the sales order), that order line will no longer be associated with the Lego Brand.

This will mean that this order line will not be included if the user filters a report by Brand, and if they view the Sales by Brand report, it would add to the 'n/a' row.

# Average Cost Prices and Profit Margins

## What is an 'Average Cost Price' and how is it calculated?

An Average Cost Price represents the mean cost of all items sold within a specific period. It's calculated by dividing the total cost of all products sold by the total number of units sold. This metric helps businesses understand the average expense of acquiring or producing the goods they've sold, allowing for better profitability analysis.

Depending on the report, this might be done per SKU ([Sell Through](#) report), or it might provide an Average Cost Price by Brand ([Sales by Brand](#)), or Department ([Sales by Department](#)), etc.

## Example

Suppose you have a **Sales by Brand report** for the brand "**Brand A**" covering the period **from January 1 to January 31**.

Within this time frame, the following sales occurred:

Product	Quantity Sold	Cost Price per Unit
Product 1	10	£5.00
Product 2	20	£7.00
Product 3	15	£6.50

To calculate the **Average Cost Price** for **Brand A** during January:

1. **Sum up the Cost Prices:**

- Product 1: 10 units × £5.00 = £50.00
- Product 2: 20 units × £7.00 = £140.00
- Product 3: 15 units × £6.50 = £97.50

2. **Total Cost Price:** £50.00 + £140.00 + £97.50 = **£287.50**

3. **Total Quantity Sold:** 10 + 20 + 15 = **45 units**

4. **Calculate the Average Cost Price:**

- £287.50 ÷ 45 units = **£6.39** (rounded to 2 decimal places)

## What is an 'Average Profit Margin' and how is it calculated?

An Average Profit Margin measures the percentage of profit a business earns on its sales after accounting for costs. Depending on the report, this might be done per SKU ([Sell Through](#) report), or it might provide an Average Cost Price by Brand ([Sales by Brand](#)), or Department ([Sales by Department](#)), etc.

### Example

An Average Profit Margin on the Sales by Brand report will look for all sales of Products assigned to that Brand that took place within the specified period. It will then total the cost price of those items and compare it to the total sales revenue to produce an Average Profit Margin using the below formula (please note that all margins are calculated net of VAT):

$$\text{Average Profit Margin} = \left( \frac{\text{Total Profit}}{\text{Total Sales Revenue}} \right) \times 100$$

**Period:** February 1 - February 28

Product	Quantity Sold	Cost Price per Unit	Selling Price per Unit
---------	---------------	---------------------	------------------------

Product 4	30	£4.00	£6.00
Product 5	25	£10.00	£15.00
Product 6	10	£20.00	£30.00

1. **Calculate the Total Sales Revenue:**

- Product 4:  $30 \times £6.00 = £180.00 = £150.00 \text{ ex VAT}$
- Product 5:  $25 \times £15.00 = £375.00 = £312.50 \text{ ex VAT}$
- Product 6:  $10 \times £30.00 = £300.00 = £250.00 \text{ ex VAT}$

**Total Sales Revenue** =  $£180.00 + £375.00 + £300.00 = £855.00 = \textbf{£712.50 ex VAT}$

2. **Calculate the Total Cost:**

- Product 4:  $30 \times £4.00 = £120.00$
- Product 5:  $25 \times £10.00 = £250.00$
- Product 6:  $10 \times £20.00 = £200.00$

**Total Cost** =  $£120.00 + £250.00 + £200.00 = \textbf{£570.00}$

3. **Calculate the Profit:**

- Profit =  $£712.50 - £570.00 = \textbf{£142.50}$

4. **Calculate the Average Profit Margin:**

$$\text{Average Profit Margin} = \left( \frac{£142.50}{£712.50} \right) \times 100 = 20\%$$

## Why do some reports say 'Unknown' (e.g. Average Cost Price and Profit Margin)?

This will be because IXO Commerce is missing data - nothing is recorded against Sales Orders for cost price. Without a cost price, it is not possible to calculate Average Cost Price or Profit Margin.

## General

### Are Reports sortable?

All reports are sortable - simply click on the headers.

### Can a report be exported?

All reports are exportable as a CSV.

## Why are some results 'N/A' or simply blank?

This will be due to missing information, e.g. products that are sold which have not been assigned to a Department, or to a Brand with a blank entry in the name.

# Sales by Date

This report will show a breakdown of company-wide sales within a given period.

Data may be viewed by:

- Day
- Week
- Month

## Sales By Date

Source: All Device: All Store: ALL Store user: ALL Specify dates from: 14/10/2023 to: 13/11/2024

Group dates by: Month Update Reset

[Download report as CSV](#) [View matching products](#) [View matching customers](#)

**Important:** This report uses the "order date" and "order value" - not the payments, as these may be different.

Number of orders:

393

Average order value (INC VAT):

£479.77

Net total sales:

£158,215.06

VAT total:

£30,333.40

Gross total sales:

£188,548.46

Month	Net	VAT	Total
Oct 2023	£13162.32	£2659.41	£15821.73
Nov 2023	£29690.67	£5782.60	£35473.27
Dec 2023	£2171.29	£286.50	£2457.79
Jan 2024	£29690.67	£5782.60	£35473.27
Feb 2024	£2171.29	£286.50	£2457.79
Mar 2024	£29690.67	£5782.60	£35473.27
Apr 2024	£2171.29	£286.50	£2457.79
May 2024	£29690.67	£5782.60	£35473.27
Jun 2024	£2171.29	£286.50	£2457.79
Jul 2024	£29690.67	£5782.60	£35473.27
Aug 2024	£2171.29	£286.50	£2457.79
Sep 2024	£29690.67	£5782.60	£35473.27
Oct 2024	£2171.29	£286.50	£2457.79
Nov 2024	£29690.67	£5782.60	£35473.27

By Month

	Net	VAT	Total
November 2024	£2171.29	£286.50	£2457.79
October 2024	£29690.67	£5782.60	£35473.27
September 2024	£13162.32	£2659.41	£15821.73

## Filters

This report may be filtered by:


- Date Range
- Store
- Store User
- Source
- Device
- Category
- Brand
- Collection
- Supplier


## Key to icons



 = view day/week/month broken down to [Sales by Channel](#) (and matching any other filters applied)

 = download report

 = view matching products (products sold within this date range and matching any other filters applied)

 = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

## FAQs

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

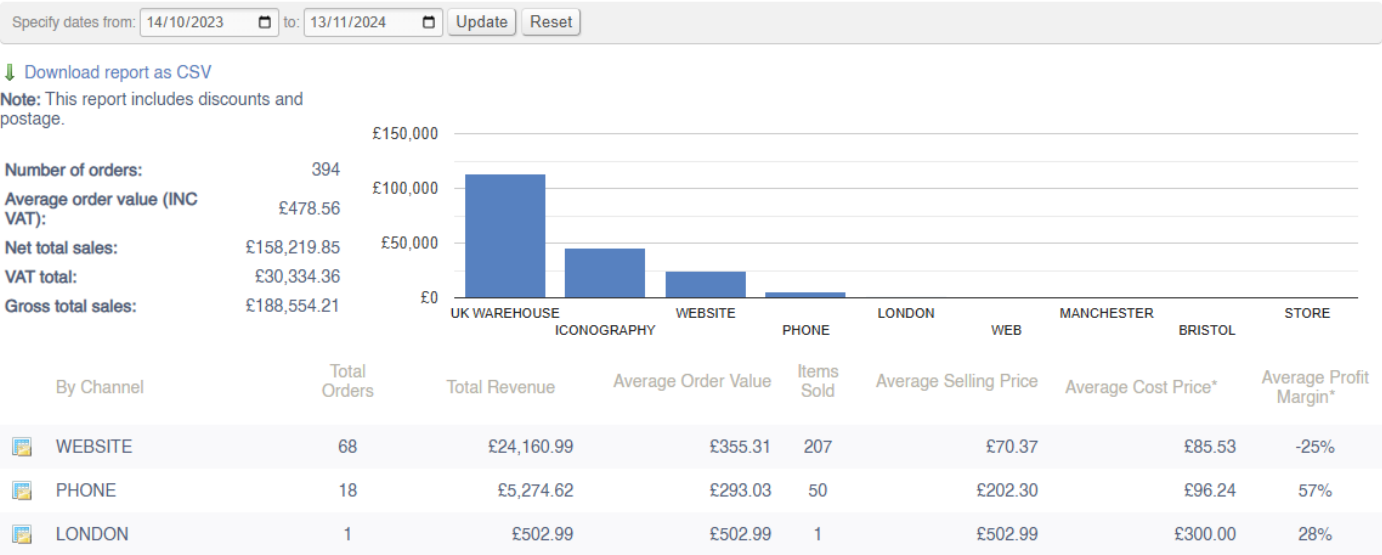
# Sales by Channel

This report will show a breakdown of company-wide sales within a given period.

The data will be broken down by Channel, wither separate rows for:

- Each Store
- eCommerce website(s)
- Phone
- Alternative Channels (e.g. [Amazon](#), [eBay](#), etc.)

## Sales By Channel



## Filters

This report may be filtered by:

- Date Range

## Key to icons

 = view [Sales by Category](#) for this date range, filtered to this Channel

 = download report

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

# FAQs

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

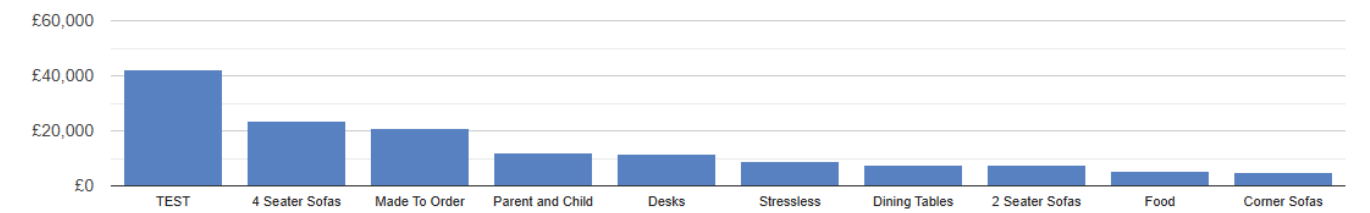
# Sales by Category

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by Category. This list is based on the categories you have set up in the [Catalogue](#).

## Sales By Category

Source: All Device: All Store: ALL Store user: ALL Brand: ALL Collection: ALL  
Supplier: ALL Specify dates from: 13/11/2023 to: 13/11/2024 Update Reset

Download report as CSV View matching products View matching customers **Note:** This report includes discounts and excludes postage.



By Category	Path	Items Sold	Total Value	Average Selling Price	Average Cost Price*	Average Profit Margin*
TEST	test	118	£42089.70	£362.43	£305.17	25%
4 Seater Sofas	living-room/sofas/4-seater-sofas	19	£23675.00	£1225.00	£750.00	24%
Made To Order	demo-category/made-to-order	20	£20935.07	£1046.75	£245.84	76%
Parent and Child	demo-category/demonstration-furniture/demonstration-sofas/parent-and-child	13	£11940.00	£852.86	£500.00	40%

## Filters


This report may be filtered by:


- Source
- Device
- Store
- Store User
- Brand
- Collection
- Supplier
- Date Range

## Key to icons

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

= download report

 = view matching products (products sold within this date range and matching any other filters applied)

 = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

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

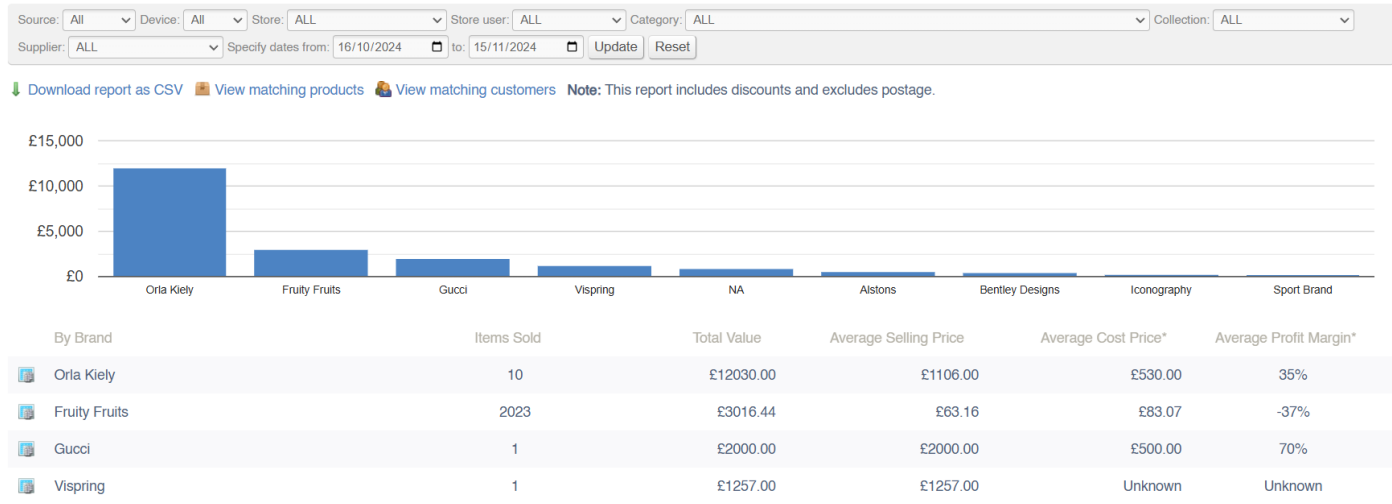
## FAQs

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

# Sales by Brand

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by Brand. This list is based on the data you have set up in the [Brands](#) menu.

## Sales By Brand




## Filters

This report may be filtered by:

- Source
- Device
- Store
- Store User
- Category
- Collection
- Supplier
- Date Range

## Key to icons

- = view sales from this Brand in the [Sales by Collection](#) report (matching any other filters applied)
- = download report
- = view matching products (products sold within this date range and matching any other filters applied)

 = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

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

## FAQs

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

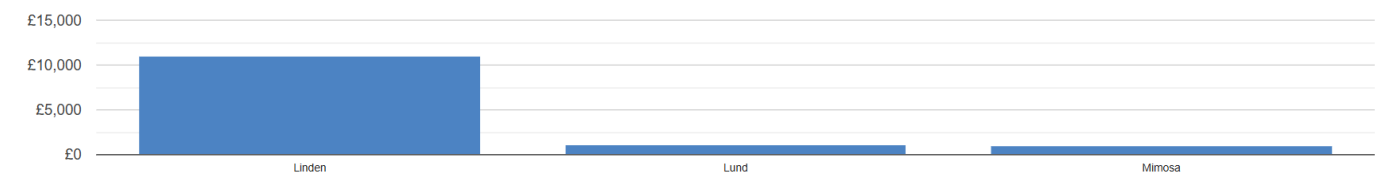
# Sales by Collection

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by Collection. This list is based on the data you have set up in the [Collections](#) menu.

## Sales By Collection

Source: All Device: All Store: Iconography Store user: ALL Category: ALL Brand: Orla Kiely  
Supplier: ALL Specify dates from: 16/10/2024 to: 15/11/2024 Update Reset

Download report as CSV View matching products View matching customers **Note:** This report includes discounts and excludes postage.



By Collection	Items Sold	Total Value	Average Selling Price	Average Cost Price*	Average Profit Margin*
Linden	9	£10980.00	£1120.00	£480.00	39%
Lund	1	£1080.00	£1080.00	£450.00	50%
Mimosa	1	£1050.00	£1050.00	£630.00	28%

**\*Note:** Profit margins are based only on items which include a cost price.

## Filters


This report may be filtered by:

- Source
- Device
- Store
- Store User
- Category
- Brand
- Supplier
- Date Range

## Key to icons

- = view sales from this Collection in the [Sell Through](#) report (matching any other filters applied)
- = download report
- = view matching products (products sold within this date range and matching any other filters applied)



 = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

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

## FAQs

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

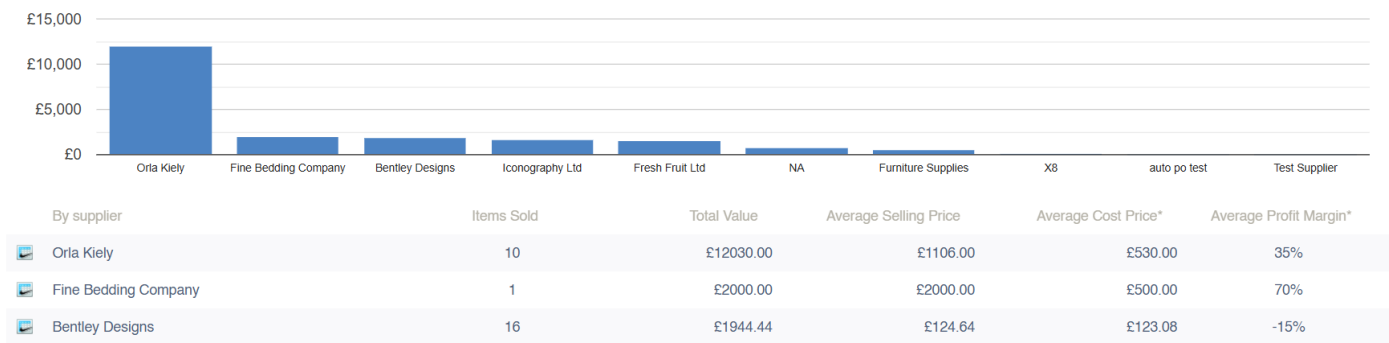
# Sales by Supplier

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by Supplier. This list is based on the data you have set up in the [Supplier](#) menu.

## Sales By Supplier

Source: All Device: All Store: ALL Store user: ALL Category: ALL Brand: ALL  
Collection: ALL Specify dates from: 16/10/2024 to: 15/11/2024 Update Reset

Download report as CSV View matching products View matching customers **Note:** This report includes discounts and excludes postage.



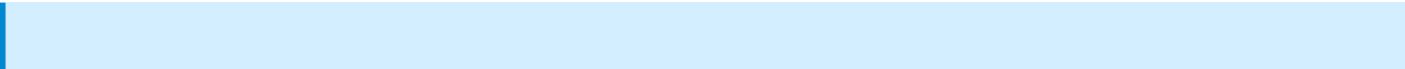
## Filters

This report may be filtered by:

- Source
- Device
- Store
- Store User
- Category
- Collection
- Brand
- Date Range

## Key to icons

- = view sales from this Supplier in the [Sales by Brand](#) report (matching any other filters applied)
- = download report
- = view matching products (products sold within this date range and matching any other filters applied)
- = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)



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

# FAQs

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

# Sales by Campaign

# Sales 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.

This report is calculated differently to other Sales Reports, as it does not use the date of the Sales Order, but the date of amendments to that Sales Order.

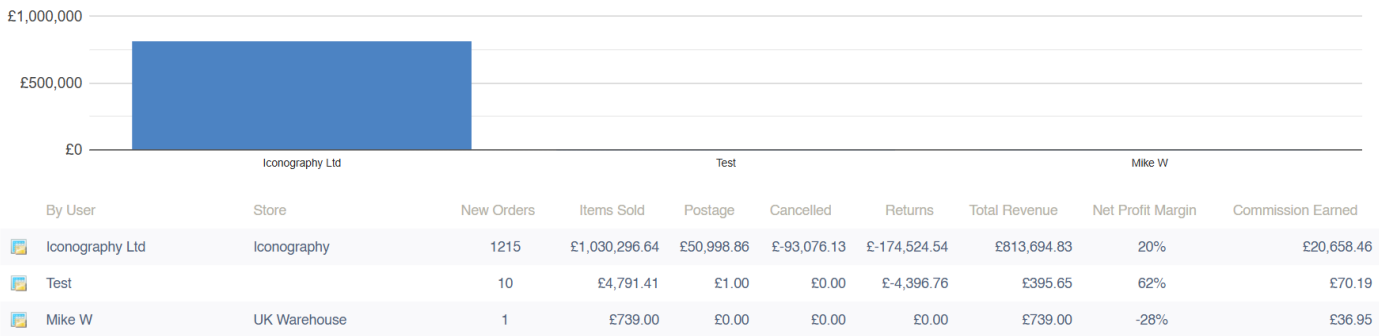
“ Sales Orders can each be attributed to a single Salesperson. This can be edited within the Sales Order management screen.

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

## Sales Performance By User

Source: All Device: All Store: ALL Specify dates from: 16/10/2020 to: 15/11/2024 Update Reset

Download report as CSV **Note:** This report includes discounts and commission is calculated by **items sold** (postage is included in the commission)



## Commission

“ Please ensure that you have spoken to Iconography to setup your commission rules; there are three options, defaulted to items sold

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. **Order 1:** Placed on **1st September**, delivered on **5th October**, total value: **£100**
1.
  - **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**
2. **Returns within the Period:**
  - **Return for Order 2:** The customer returned the item on **15th October** (within the report period).
  - **Return for Order 1:** The customer returned the item on **20th October** (also within the report period).
3. **Commission Calculation:**
  - Let's say the commission rate is **10%**.
  - The total sales amount for the period (1st October - 20th October) is:  
 $\text{£100 (Order 1) + £150 (Order 2) + £200 (Order 3) = £450.}$
4. **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**.
5. **Adjusted Sales for Commission:**
- Adjusted sales amount = £450 (total sales) - £250 (returns) = **£200**.
6. **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**.

■

## 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

 = view matching products (products sold within this date range and matching any other filters applied)

 = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

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

## FAQs

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

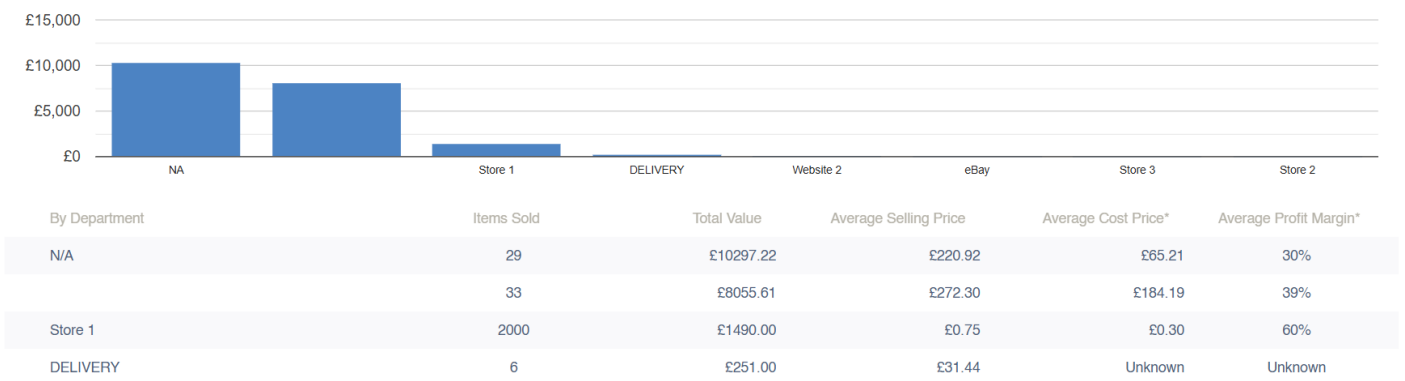
# Sales by Department

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by Department. This list is based on the departments you have set up against [Products](#)

## Sales By Department

Source: All Device: All Store: ALL Store user: ALL Specify dates from: 16/10/2024 to: 15/11/2024 Update Reset

 Download report as CSV **Note:** This report includes discounts and excludes postage.



## Filters

This report may be filtered by:

- Source
- Device
- Store
- Store User
- Date Range

## Key to icons

 = download report

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

## FAQs

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



# Sell Through

This report will show a breakdown of company-wide sales within a given period; the value of sales will be split by Variant.

If you prefer, use the Combine Variants checkbox to view this report by Product instead of by Variant.

By default, this report will exclude unsold items, but it is possible to include unsold items by using the checkbox.

## Sell Through

Source: <span>ALL</span> Store: <span>ALL</span> Store user: <span>ALL</span> Category: <span>ALL</span> Brand: <span>ALL</span>													
Collection: <span>ALL</span> Supplier: <span>ALL</span> Specify dates from: <span>16/10/2024</span> to: <span>15/11/2024</span> Combine variants? <input type="checkbox"/> Include unsold? <input type="checkbox"/> <span>Update</span> <span>Reset</span>													
<span>Download report as CSV</span> <span>View matching customers</span> <b>Note:</b> This report includes discounts													
product	code	variant	total sold	total net	total VAT	total revenue	average selling price	average cost price	profit margin	current stock	stock in	stock holding	last sold
Yellow banana (bulk pricing)	1853y		2000	£1490.00	£0.00	£1490.00	£0.75	£0.30	60%	2394	1	£790.02	04/11/2024
Gift Wrap: Blue Gift Wrap	giftwrap2	Gift Wrap: Blue Gift Wrap	1000	£8330.00	£1670.00	£10000.00	£10.00	£4.00	52%	0	0	£0.00	Unknown
Wrendale Owl Tea Towel	teatowels		18	£86.25	£17.28	£103.50	£5.75	£3.00	37%	22	3	£66.00	14/11/2024
Window Lock	34394ppp		16	£82.50	£16.50	£99.00	£6.19	£5.99	-16%	14	7	£83.86	24/10/2024
Tennis Ball	fdghdfghdfgh	dfghdfghdfgh	13	£4.95	£0.97	£5.94	£0.46	£0.40	-5%	58	60	£23.20	07/11/2024
Gift Voucher	Voucher-10	£10	7	£66.75	£0.00	£66.75	£9.54	Unknown	Unknown	1	1	Unknown	23/10/2024

## Filters


This report may be filtered by:

- Source
- Device
- Store
- Store User
- Category
- Brand
- Collection
- Supplier
- Date Range

## Key to icons

= view customers who bought this product in this time period

= download report

 = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

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

## FAQs

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

# Made to Order


This report will show a breakdown of company-wide sales of Made to Order products within a given period; this data is broken down by product and by options. This list is based on the data you have set up in the [Collections](#) menu.

A single SKU may be listed here multiple times, as there will be a separate listing for each combination of Customisations, e.g. 'Blue' with 'Oak Feet' will be separate to 'Blue' with 'Black Feet'.


## Made To Order

Source: All Store: ALL Store user: ALL Category: ALL Brand: ALL

Collection: ALL Supplier: ALL Specify dates from: 16/10/2024 to: 15/11/2024 Combine options? ☐ Update Reset

 Download report as CSV

Note: This report includes discounts

product	code	options	total sold	total net	total VAT	total revenue	average selling price	average cost price	profit margin
 Orla Kiely Linden Large Sofa	705624-1	Grade B Fabric: B_Naples_Oyster Scatter Cushions: 3668	5	£5416.67	£1083.35	£6500.00	£1300.00	Unknown	Unknown

## Filters

This report may be filtered by:

- Source
- Device
- Store
- Store User
- Category
- Brand
- Collection
- Supplier
- Date Range

## Key to icons

-  = view sales from this Collection in the [Sell Through](#) report (matching any other filters applied)
-  = download report
-  = view matching products (products sold within this date range and matching any other filters applied)
-  = view matching customers (customers who completed a purchase within this date range and matching any other filters applied)

# FAQs

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