

Sales Tracking & Reporting

Building Materials & Hardware

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Designs a sales tracking and reporting system — daily/monthly sales by product and brand, margin tracking, customer-wise sales and outstanding, and salesman performance — so you manage the business by numbers. Use it to build reporting. For financials use the Store P&L Modeller.

Purpose of this tool & output

Track sales, margins and customer dues

How the output is used

Use it to track sales, margins and customer dues — a simple reporting routine that shows what is selling and who owes you.

Important cautions

Track margin and outstanding alongside sales; high sales with thin margins and rising dues is a warning, not a win.

Companion documents

- Counter Sales & Billing SOP
- Quotation & Order Builder
- Contractor & Builder Sales Playbook
- Upsell & Cross-Sell Guide
- Delivery & Logistics SOP
- Customer Service & Complaint SOP

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