

# How to use Salesperson reports in effectmanager

This guide shows you how to use the POS Salesperson reports in the effectmanager Report module.

*This guide is only of relevance if you have the online POS reports module in effectmanager.*



The Salesperson reports provide an overview of how your Salesreps are performing this year compared to last year. In this report, you can compare Turnover, Sales, and Category on KPIs like index and %share.

Using the filtering options you can design your report as you wish. You can filter out other sales reps. See how all your sales reps perform in a specific chain or on a specific product.

*If you need a guide that show you how to use filters in effectmanager please see our guide [How to use filters in effectmanager](#)*

The Salesperson report is available in two different reports. Below we will go through them.

- [Salesperson report daily](#)
- [Salesperson report weekly](#)

## Salesperson report daily

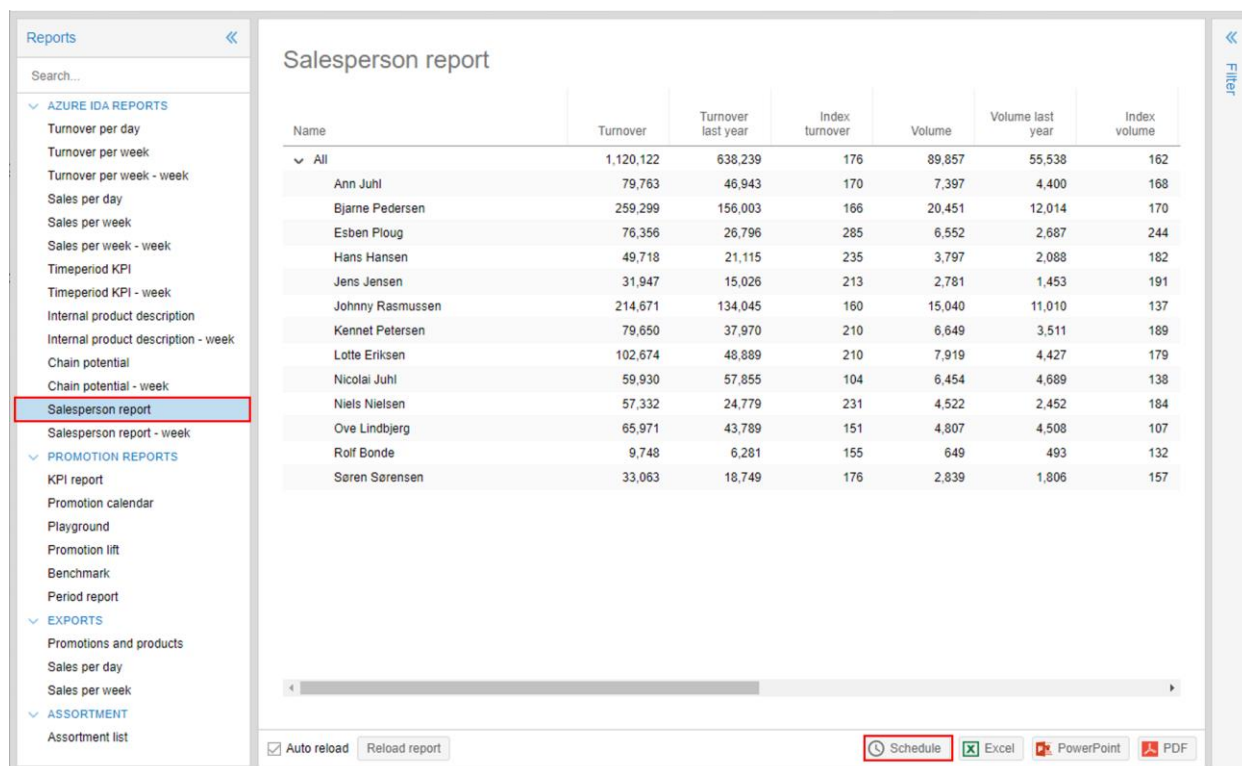
This POS report provides you with a table report based on your filtering selection compared to the same period last year. The Salesperson report allows you to choose the desired period using the day hierarchy. Whereas the [Salesperson report - week](#) uses the week hierarchy and will always sum data on a weekly level.

In the example below I have selected Salling Group from 01/01-2020 to 18/01/2020 this will provide me with a report with all POS data from 01/01-2020 to 18/01/2020.

You can also add a detail filter, to see how to compare how your sales reps perform for a specific chain, brand or product.

You also have the option to Schedule Reports for send-out to yourself, your Salesreps or others. This feature is very useful to save time - if you need to send out a report each week to your sales reps.

*If you need a guide that show you how to schedule reports in effectmanager, please see our guide [How to schedule a task/report in effectmanager](#)*



**Salesperson report**

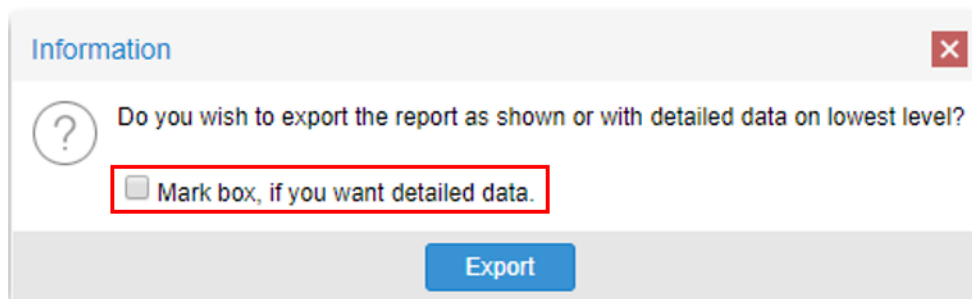
Name	Turnover	Turnover last year	Index turnover	Volume	Volume last year	Index volume
▼ All	1,120,122	638,239	176	89,857	55,538	162
Ann Juhl	79,763	46,943	170	7,397	4,400	168
Bjarne Pedersen	259,299	156,003	166	20,451	12,014	170
Esben Ploug	76,356	26,796	285	6,552	2,687	244
Hans Hansen	49,718	21,115	235	3,797	2,088	182
Jens Jensen	31,947	15,026	213	2,781	1,453	191
Johnny Rasmussen	214,671	134,045	160	15,040	11,010	137
Kennet Petersen	79,650	37,970	210	6,649	3,511	189
Lotte Eriksen	102,674	48,889	210	7,919	4,427	179
Nicolai Juhl	59,930	57,855	104	6,454	4,689	138
Niels Nielsen	57,332	24,779	231	4,522	2,452	184
Ove Lindbjerg	65,971	43,789	151	4,807	4,508	107
Rolf Bonde	9,748	6,281	155	649	493	132
Søren Sørensen	33,063	18,749	176	2,839	1,806	157

Auto reload    Reload report

All Salesperson reports can be exported to Excel, PowerPoint, and PDF by pressing the icons at the bottom of the report.

**NB! Exporting to PowerPoint** you will be asked if you want to export detailed data?

Checking the box will expand all rows to the lowest level in the exported file.



Information ✕

Do you wish to export the report as shown or with detailed data on lowest level?

Mark box, if you want detailed data.

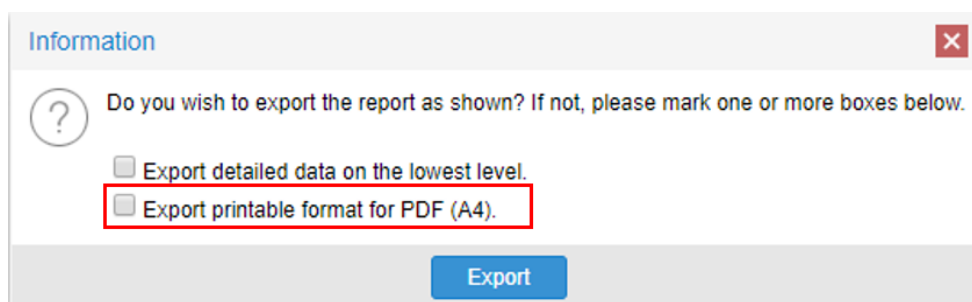
**Export**

**NB! Exporting to PDF** you will be asked if you want to export detailed data?

Checking the box will expand all rows to the lowest level in the exported file.

When exporting to PDF you will be asked if you want a printable PDF (A4)?

Checking this box will limit the number of columns exported if not all columns can fit in the PDF.



Information ✕

Do you wish to export the report as shown? If not, please mark one or more boxes below.

Export detailed data on the lowest level.

Export printable format for PDF (A4).

**Export**

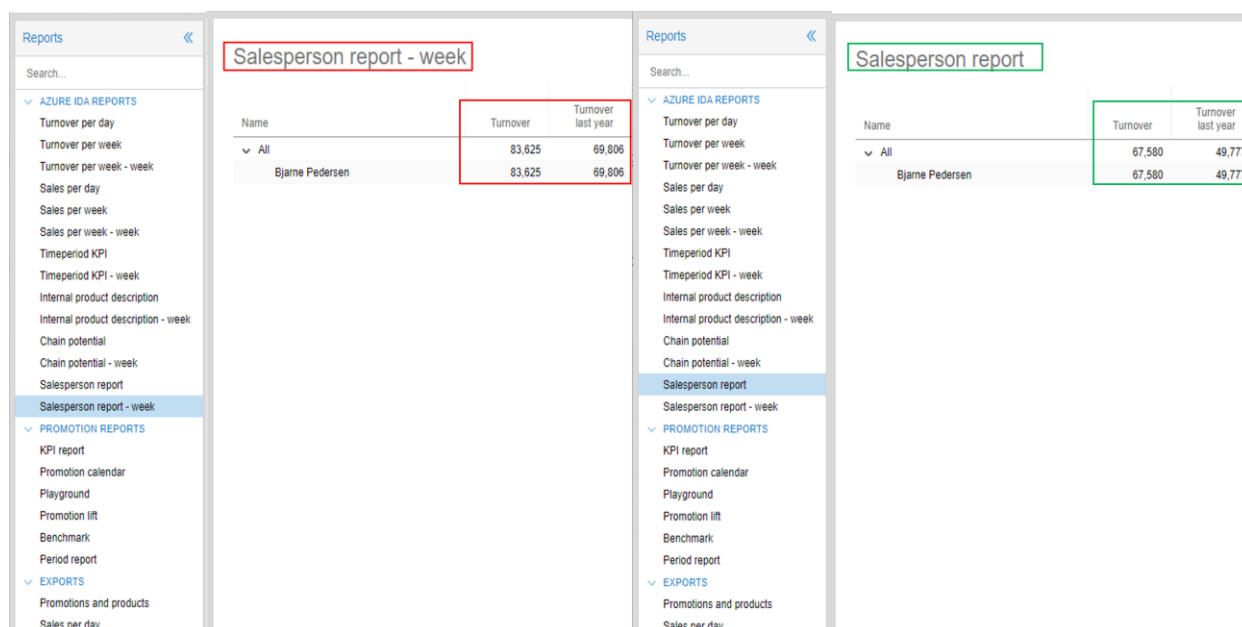
## Salesperson report weekly

This POS report provides you with a table report based on your filtering selection compared to the same period last year. The report uses the week hierarchy and will always sum data on a full week. Whereas the [Salesperson Daily report](#) allows you to select the period based on a daily period hierarchy.

In the example below I have selected Salling Group, Bilka for Salesrep Bjarne Pedersen - from 01/01-2020 to 18/01/2020. Using the weekly hierarchy I will get a report from 30/12-2019 to 19/01/2020 (week52-week 3) with POS data for Bjarne Pedersen in Bilka.

*If you need a guide that shows you how to maintain your field force, please see our guide [How to maintain your field force in effectmanager](#)*

Try comparing Turnover Key Figures for the two reports with the same period selected - this illustrates that the week report always shows data for full weeks.



Name	Turnover	Turnover last year
▼ All	83,625	69,806
Bjarne Pedersen	83,625	69,806

Name	Turnover	Turnover last year
▼ All	67,580	49,777
Bjarne Pedersen	67,580	49,777