



Balance to Buy™ *SavedReports!*

By Abe Sherman

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Okay, now this is *really* cool... The new Balance to Buy™ *SavedReports* feature that we had been developing over the past few months is fully functional! We offered a sneak peek during the various JCK/BIG events in Las Vegas and have been in testing mode until now.

SavedReports works in all of the Summary/Detail reports in Balance to Buy™. This is going to give you the greatest flexibility in custom designing your reports, exactly the way you would like to see them, weekly or monthly. In fact, you can run the same report, but formatted, filtered, and sorted differently for each member of your team!

SavedReports are generated and saved for each individual UserName in the Balance to Buy™ system. Meaning, if you have three people in your company who have their own UserName access to Balance to Buy™, each of you will be able to generate your own customized reports. The CEO, CFO, GMM, Buyers and Inventory Managers all have different jobs to do, and therefore, likely require very different information. *SavedReports* allows you to create as many of these different reports as you would like.

Also, each of the reports can be sent to *as many recipients as required*. Therefore, one report can go to your CEO and CFO each month (for example, a Vendor report sorted by aged inventory), and five other reports can go to various buyers, but not to the CEO or CFO. In other words, these reports are *completely customizable* to suit your needs.

After you save a report, when you click on the Saved Report menu at the top of the screen, you will see a list of your saved reports. For each report, you have 3 choices for how to work with the report.

You can instantly create a csv, Excel or PDF copy of the report. This is handy for reports that you run frequently. Instead of creating the report from scratch – setting the filters, sorting, and detail information, you can just click one button, and Presto!

You can view the report on the screen in interactive mode. This is very useful if you want a starting point for further analysis – it's a shortcut to that will save many steps.

You can schedule the report to be delivered by email. If there is a report you like to see regularly always the same way, just schedule it to be delivered automatically. This is also handy for reports that use lots of information and can take some time to run. The reports can be scheduled to run any days of the week or any days of the month, and can be addressed to as many recipients as needed.

While the report and the formatting will remain constant, the data within the report will be changing each time the report is sent based on the date the report is generated. BTB will always look at rolling-12-months of sales history and your current inventory. Very soon there will be an option to limit the time-period for the sales portion of the reports to be weekly, monthly, quarterly, YTD, or rolling 12 months. We're adding this so you can run a report on, for example, Fast Sellers for your top 10 vendors

or categories, every week, or every month. Once those are set up, you can decide which suppliers you want to replenish Fast Sellers with automatically, and they will be emailed individually, as well.

Please take a few moments to review the following screen shots and set up a test of the *SavedReports* functionality.

Price Points

Report Name: PricePoint Ear-Dia

Vendor: 925 Company
A & Z Hayward
A Jaffe

Transaction Type: Asset
Faux Sample
Memo Instock

Start Date: 1/2/2008 End Date: 12/31/2008

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Price Point Analysis Report for BIG Created 08/03/2011
Data Sets: AZ Member 2 Sanitized
Categories: Ear - Dia, Vendors: All, Level: All, Type: All

Price Point	SALES			COST OF GOODS		INVENTORY			TURN OVER	PROFIT			AGED			
	DetailCol	Sales	Units	Avg Ticket	Cost	Avg Cost	Cost Onhand	Units		Avg Cost OH	GP%	GM%	GMROI	Cost of Aged	Units	%Aged Stock
\$15,000-\$15,000 +		\$143,858	5	\$28,772	\$69,187	\$13,837	\$91,836	8	\$11,479	0.75	\$74,671	0.52	\$0.81	\$83,196	7	91%
\$10000-\$15000		\$57,667	5	\$11,333	\$25,894	\$5,179	\$26,561	5	\$5,312	0.97	\$31,773	0.55	\$1.20	\$14,551	3	55%
\$7500-\$10000		\$7,630	1	\$7,650	\$3,053	\$3,053	\$14,236	3	\$4,745	0.21	\$4,597	0.60	\$0.32	\$9,761	2	68%
\$5000-\$7500		\$80,425	14	\$5,745	\$37,518	\$2,680	\$24,997	10	\$2,500	1.50	\$42,908	0.53	\$1.72	\$20,290	8	81%
\$4000-\$5000		\$45,952	10	\$4,595	\$24,221	\$2,422	\$23,999	12	\$2,000	1.01	\$21,731	0.47	\$0.91	\$8,887	4	37%
\$3000-\$4000		\$27,115	8	\$3,389	\$14,074	\$1,759	\$11,011	7	\$1,573	1.28	\$13,041	0.48	\$1.18	\$9,361	6	85%
\$2500-\$3000		\$42,228	16	\$2,639	\$18,077	\$1,130	\$10,916	9	\$1,213	1.66	\$24,151	0.57	\$2.21	\$8,106	7	74%
\$2000-\$2500		\$22,547	10	\$2,255	\$9,895	\$989	\$5,789	6	\$965	1.71	\$12,652	0.56	\$2.19	\$3,764	4	65%
\$1500-\$2000		\$38,976	23	\$1,695	\$18,785	\$817	\$13,031	16	\$814	1.44	\$20,191	0.52	\$1.55	\$9,862	12	76%
\$1000-\$1500		\$40,353	32	\$1,261	\$18,683	\$584	\$10,663	19	\$561	1.75	\$21,670	0.54	\$2.03	\$7,432	13	70%
\$800-\$1000		\$9,366	10	\$937	\$3,827	\$383	\$2,779	7	\$397	1.38	\$5,539	0.59	\$1.99	\$2,354	6	85%

Saved Reports

Report Name	Created On	Email	Export	Schedule	View	Delete
PricePoint Ear-Dia	8/3/2011 8:38:48 AM		Excel CSV PDF	Schedule	View	Delete

Go to **SavedReports** on your task bar to find the list of your saved

To schedule the saved reports to be sent to you automatically, click on the **Schedule** button

Select Enabled to schedule the reports

Select Days in the Week or Days in the Month

Select day, time (Central) & the report format (CSV, MS Excel, or PDF)

Insert all of the email addresses of those who are to receive this particular report. Each report can have different recipients.

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Saved Reports

Report Name	Created On	Email	Export	Schedule	View	Delete
PricePoint Ear-Dia	8/3/2011 8:28:48 AM		Excel CSV PDF	Schedule	View	Delete

You may schedule these reports to be emailed automatically or simply keep the formatting available for any time you would like to see this particular report. Just select the Export style you would like and the report will open. This will save you the steps of re-creating this report in Balance to Buy™

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