Global sales Data Analytics

Date	15-11-2022
Team id	PNT2022TMID45267
Project Name	Global sales Data Analytics

Sales by subcategory analytics

What does the Sales by Category report show?

The Sales by Category report tells you how much revenue is being generated for each product category (e.g., "clothing" and "music") and service revenue category (e.g., "retreats" and "classes"). It's a great way to see which revenue categories are generating the most money for your business.

With this report you can:

- Pull sales data about each revenue category at your business.
- Compare past sales category data within the software.

How do I use this report?

You can use this report to see a breakdown of your sales by the revenue categories assigned to your services and products.

Before you start

- This feature is only available with certain software packages. For more information on what your subscription includes, click here.
- It is recommended that you set up at least a few revenue categories for your products and services prior to generating this report. If the categories are not assigned, your results will be more difficult to analyze. For more information about managing revenue categories, click here.
- For staff to run this report, the "Sales/Sales by Category/Sales by Services" and "Ability to view all clients" staff permission must be enabled.
- Mindbody navigation is different for some customers. If the navigation bar displays on the left side of your screen instead of at the top, there may be minor differences in your navigation

experience. For additional information, click here.

New to the report

The Sales by Category report gives you a more detailed view of your sales, separated by the revenue categories assigned to each service and product. The data found in this report provides a more detailed analysis than the analytics provided by the Client Acquisition Dashboard. Using this report, you can view past sales data grouped by category and you can also compare past sales dates using the filters found at the bottom of the Quick Dates options.

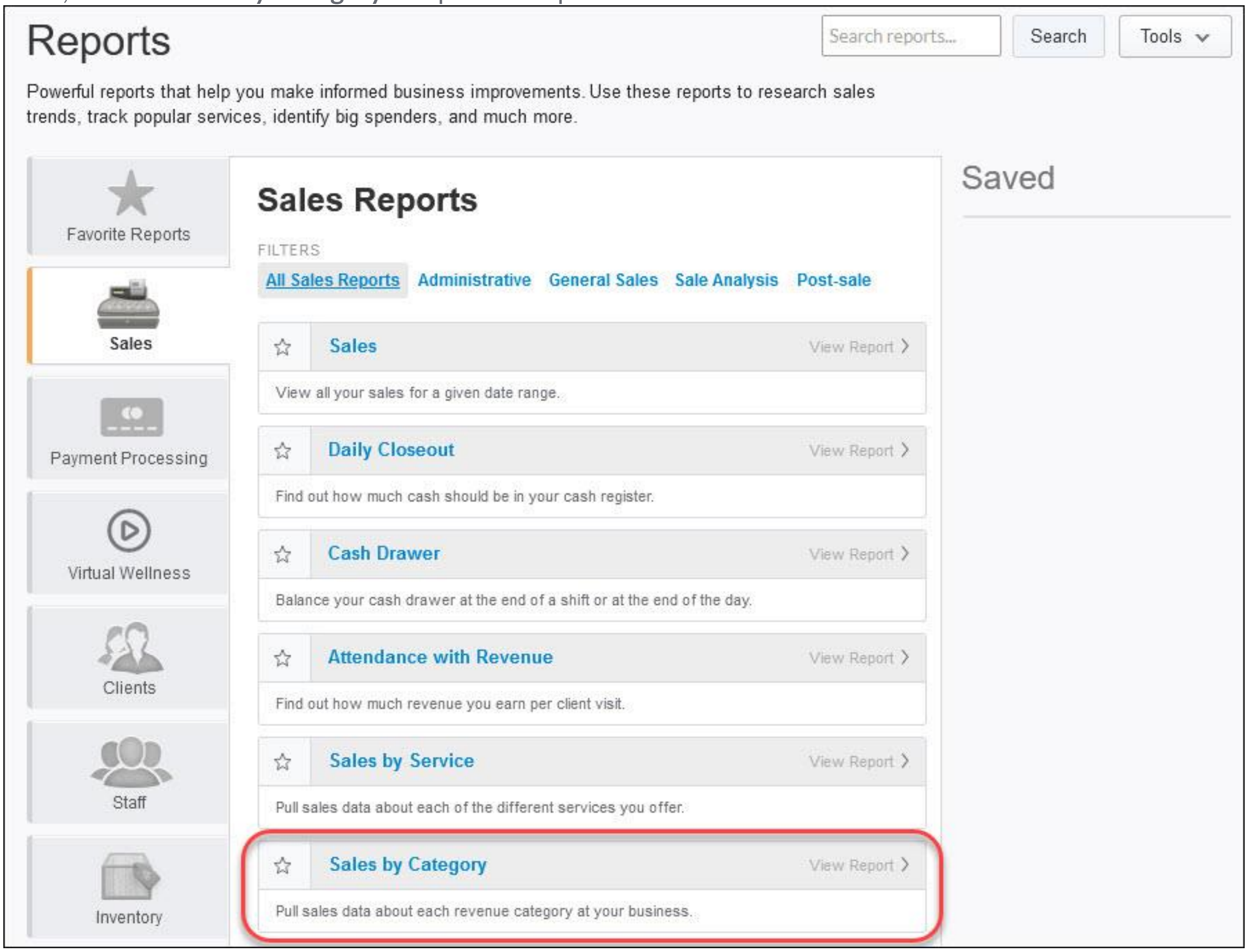
Things to know

- This report can be generated in either accrual or cash basis. The first time you run this report, it will default to the accrual basis. If you change this, the report will remember what basis you used last time and default to that select for future visits.
- If you choose to run the report in the cash basis, you will notice a "Deposits" section at the bottom. This section displays the original price and remaining balance of payments to account and assignable gift cards. Prepaid gift card purchases appear in their own section of the report.
- Filtering this sales report by employee name requires that you assign each employee their own login and that they use it every time they make a sale.
- Once this report has been generated, you can use the dynamic column headings to sort the data.
- Filtering this sales report by rep requires that you assign each rep their own login and that they use it every time they make a sale.
- You can always use the search bar at the top right to search for Sales by Category by name, and if it's a report you use often, then consider making it one of your favorites.

First run instructions

1. Go to the **Reports** tab and choose **Sales** from the tabs on the left.

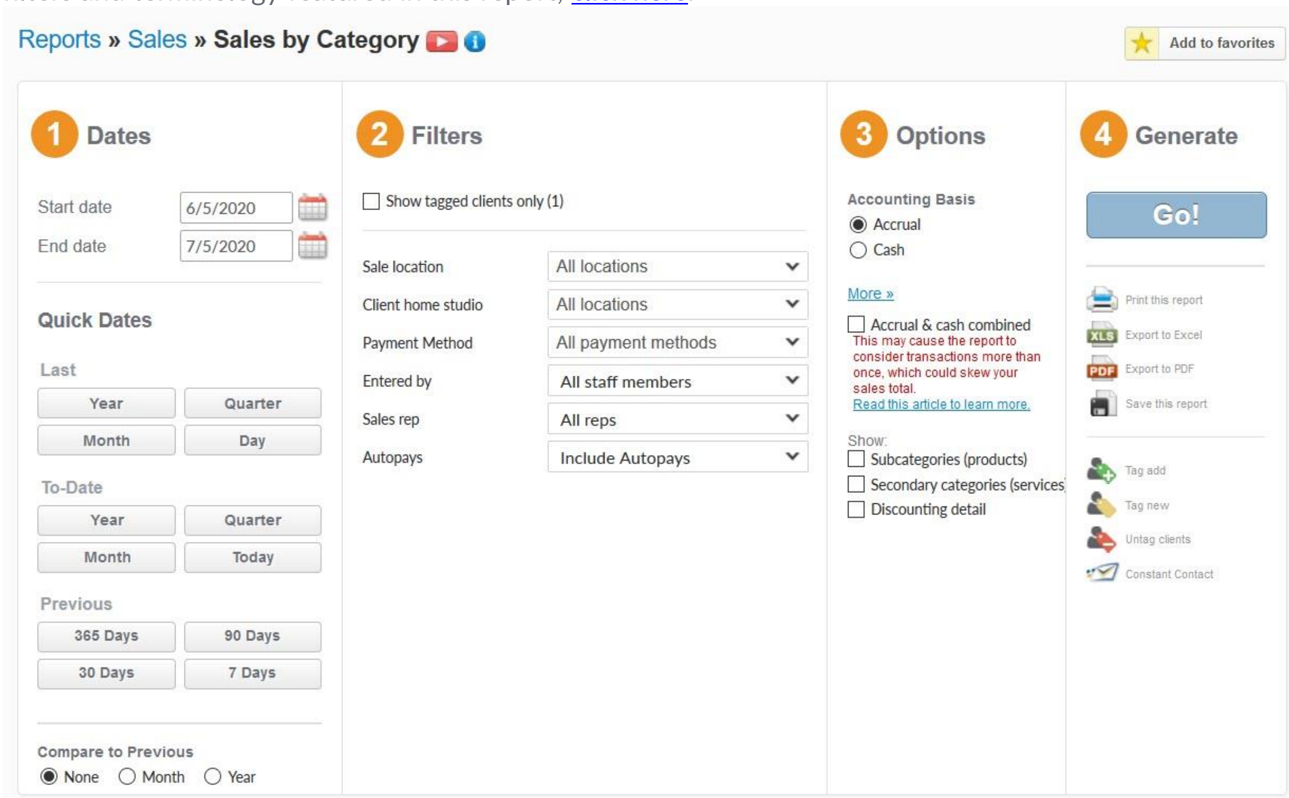
2. Then, click on **Sales by Category** to open the report.



- If you're using Mindbody experience, you can locate the Sales by Category report by going to the left side panel and click **Insights** > **Reports** > **Sales by Category**.

3. Next, select a date range by typing in the dates or click on Quick Dates to choose from Calendar Months, To Date, or Rolling Averages.
   - *Note*: If you'd like to Compare past sales data, use the radio button to select the month or year to compare the report's results to the previous month or year for the same dates. To learn more about the Compare to Previous feature, click here.

4. You can narrow the report's results by modifying the filters. For more information about the filters and terminology featured in this report, [click here](#).



5. Select an **Account Basis**.
6. Click **Go!** to generate the report based on the filters you selected.

For more details about the report's results in summary and detail view, read the [Understanding the results](#) section below.

Familiar with this report

If you're familiar with the Sales by Category report, you can find quick run instructions, information about the results, and the terminology featured in this report below.

Things to know

- If you export this report to Excel using the Accrual accounting basis, products have no secondary category and services have no subcategory grouping.
- If you export this report to Excel using the Cash accounting basis, you will see an additional column in the excel file called "Grouping". There are five groups: Services, Products, Prepaid Gift cards, Deposits, and Other.

Locate and generate

1. Go to the **Reports** > **Sales** > **Sales by Category** to open the report.
    - If you're using [Mindbody experience](#), you can locate the Sales by Category report by going to the left side panel and click **Insights** > **Reports** > **Sales by Category**.

2. Select your filters and click **Go!** to generate the report.

For more information about the filters and terminology featured in this report, click here.

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Understanding the report's results

The results of this report are divided into products and services. These results will include information about the product category, product subcategory, the subtotal of sales for the category, discounts applied to the sale, tax, and a total. The results will also include the total of the sale and a breakdown of the cash and non-cash equivalent payment methods used. *Note*: If you selected one of the additional options prior to generating the report, you will see extra columns in your results.

Products	Sales Summary						Payments Summary		
Category	Subcategory	Subtotal (Excluding Tax)	Discount	Subtotal-Discount (Excluding Tax)	Tax	Total	Cash Equivalent	Non-cash Equivalent	% Of Revenue
Accessories		$0.78	$0.00	$0.78	$0.05	$0.83	$0.83	$0.00	0.10%
Not Assigned		$7.62	$0.00	$7.62	$0.38	$8.00	$8.00	$0.00	1.01%
Not Assigned		$14.29	$0.00	$14.29	$0.71	$15.00	$15.00	$0.00	1.89%
		Subtotal (excluding tax): $22.69	Discount: $0.00	Subtotal-Discount (excluding tax): $22.69	Tax: $1.14	Total: $23.83	Cash equivalent: $23.83	Non-cash equivalent: $0.00	

Services	Sales Summary						Payments Summary		
Category	Secondary Category	Subtotal (Excluding Tax)	Discount	Subtotal-Discount (Excluding Tax)	Tax	Total	Cash Equivalent	Non-cash Equivalent	% Of Revenue
Classes		$477.80	$0.00	$477.80	$0.00	$477.80	$477.80	$0.00	60.10%
Classes	Yoga	$20.00	$0.00	$20.00	$0.00	$20.00	$20.00	$0.00	2.52%
Classes location 2		$133.37	$0.00	$133.37	$0.00	$133.37	$133.37	$0.00	16.78%
Classes location1		$50.00	$0.00	$50.00	$0.00	$50.00	$50.00	$0.00	6.29%
Facial Treatments		$25.00	$0.00	$25.00	$0.00	$25.00	$25.00	$0.00	3.14%
Yoga		$65.00	$0.00	$65.00	$0.00	$65.00	$65.00	$0.00	8.18%
		Subtotal (excluding tax): $771.17	Discount: $0.00	Subtotal-Discount (excluding tax): $771.17	Tax: $0.00	Total: $771.17	Cash equivalent: $771.17	Non-cash equivalent: $0.00	

Grand total	Subtotal (excluding tax)	Discount	Subtotal-Discount (excluding tax)	Tax	Total	Cash equivalent	Non-cash equivalent
	$793.86	$0.00	$793.86	$1.14	$795.00	$795.00	$0.00

There are five possible groups represented in this report: Services, Products, Prepaid Gift cards, Deposits, and Other. If there are no sales within one of these categories it will not display within your results.

The Other category consists of Tips, Shipping & Handling charges, and Fees. *Note*: The Fees in this section include Suspension Fees, Returned Payment Fees, and Auto Renew Charges processed within your site.

Other				
Category	Subtotal (Excluding Tax)	Tax	Total	% Of Revenue
Shipping & Handling	$30.45	$0.00	$30.45	0.06%
Tip	$55.00	$0.00	$55.00	0.12%
Fees	$100.00	$0.00	$100.00	0.06%
	Subtotal (excluding tax): $185.45	Tax: $0.00	Total: $185.45	

The Deposits category contains any Assignable Gift Card sales and Account Payments. This category only appears if you run the report with the Accounting Basis set to "Cash."

Deposits

Deposits

Category	Subtotal (Excluding Tax)	Tax	Total	% Of Revenue
Gift Cards	$665.00	$0.00	$665.00	13.83%
Payments on Account	$1,620.00	$0.00	$1,620.00	33.69%
	Subtotal (excluding tax): $2,285.00	Tax: $0.00	Total: $2,285.00	

If you are using the **Compare to Previous** feature, the results will be divided into two sections. The start/end date results will be on the left, and the previous dates, which you are using for comparison, will be on the right. Also, the report's results provide a change in percent between the two sets of dates and a percentage of revenue for each category.

Products	6/1/2019 - 6/30/2019								5/1/2019 - 5/30/2019				
Category	Subtotal (Excluding Tax)	Discount	Subtotal-Discount (Excluding Tax)	Tax	Total	Cash Equivalent	Non-cash Equivalent	% Of Revenue	Subtotal (Excluding Tax)	Tax	Sales Total	% Of Revenue	% Change
Accessories	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	$0.78	$0.05	$0.83	0.13%	---%
Not Assigned	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	$21.91	$1.09	$23.00	3.65%	---%
	Subtotal (excluding tax): $0.00	Discount: $0.00	Subtotal-Discount (excluding tax): $0.00	Tax: $0.00	Total: $0.00	Cash equivalent: $0.00	Non-cash equivalent: $0.00		Subtotal (excluding tax): $22.69	Tax: $1.14	Sales Total: $23.83		% Change: ---

Services	6/1/2019 - 6/30/2019								5/1/2019 - 5/30/2019				
Category	Subtotal (Excluding Tax)	Discount	Subtotal-Discount (Excluding Tax)	Tax	Total	Cash Equivalent	Non-cash Equivalent	% Of Revenue	Subtotal (Excluding Tax)	Tax	Sales Total	% Of Revenue	% Change
Classes	$90.00	$0.00	$90.00	$0.00	$90.00	$90.00	$0.00	54.55%	$407.80	$0.00	$407.80	64.73%	-77.93%
Classes location 2	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	$133.37	$0.00	$133.37	21.17%	---%
Classes location1	$50.00	$0.00	$50.00	$0.00	$50.00	$50.00	$0.00	30.30%	$0.00	$0.00	$0.00	0.00%	---%
Facial Treatments	$25.00	$0.00	$25.00	$0.00	$25.00	$25.00	$0.00	15.15%	$0.00	$0.00	$0.00	0.00%	---%
Yoga	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00%	$65.00	$0.00	$65.00	10.32%	---%
	Subtotal (excluding tax): $165.00	Discount: $0.00	Subtotal-Discount (excluding tax): $165.00	Tax: $0.00	Total: $165.00	Cash equivalent: $165.00	Non-cash equivalent: $0.00		Subtotal (excluding tax): $606.17	Tax: $0.00	Sales Total: $606.17		% Change: -72.78%

Grand total	Subtotal (excluding tax)	Discount	Subtotal-Discount (excluding tax)	Tax	Total	Cash equivalent	Non-cash equivalent	Subtotal (excluding tax)	Tax	Sales Total	% Change
	$165.00	$0.00	$165.00	$0.00	$165.00	$165.00	$0.00	$628.86	$1.14	$630.00	-73.81%

The Compare to Previous feature enables you to select the month or year radio button to compare the report's results to the previous month or year for the same dates. For example, if the original dates were 5/1/2019 - 5/10/2019, then the previous month would measure 4/1/2019 - 4/10/2019, and the previous year would measure 5/1/2018 - 5/10/2018. This is an incredibly fast and powerful way to find out if you're doing better in sales than you did a month or year ago.

The % Change is calculated as follows: (Sales total for start and end dates - Sales total for previous dates) / Sales total for previous dates = Percent of change