



Profit Analysis Report

OVERVIEW

The Profit Analysis Report provides profit analysis details on orders in the specified period, showing costs, margins, and commissions broken down by Sales Reps.

Why Use This Report

This report is a valuable tool for decision-makers to understand the financial health of your company, identify areas for improvement, and make informed strategic decisions to enhance overall profitability. It provides a comprehensive view of the financial landscape, enabling strategic planning and effective resource management.

When Should I Run This Report?

The frequency of running a Profit Analysis Report depends on various factors, including the nature of your business, industry dynamics, and the level of detail required for decision-making. Frequency should align with your business' needs for timely and relevant information.

If your business operates on a cyclical pattern or has peak seasons, adjust the frequency of the analysis to coincide with these cycles. The key is to strike a balance between having timely information for decision-making and avoiding unnecessary administrative burden.

Users

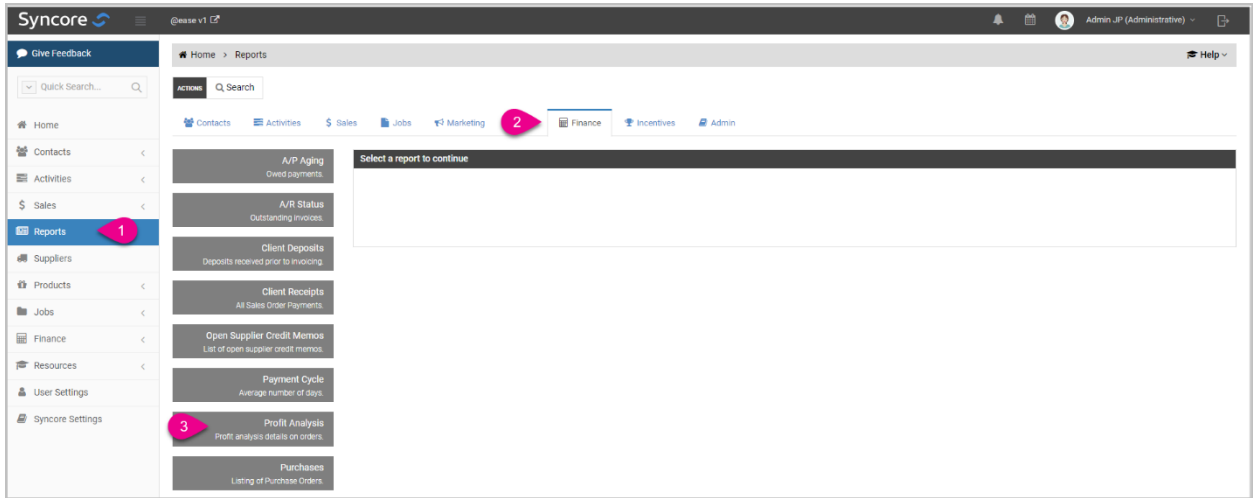
Finance and Admin Users.

To run a Profit Analysis Report:

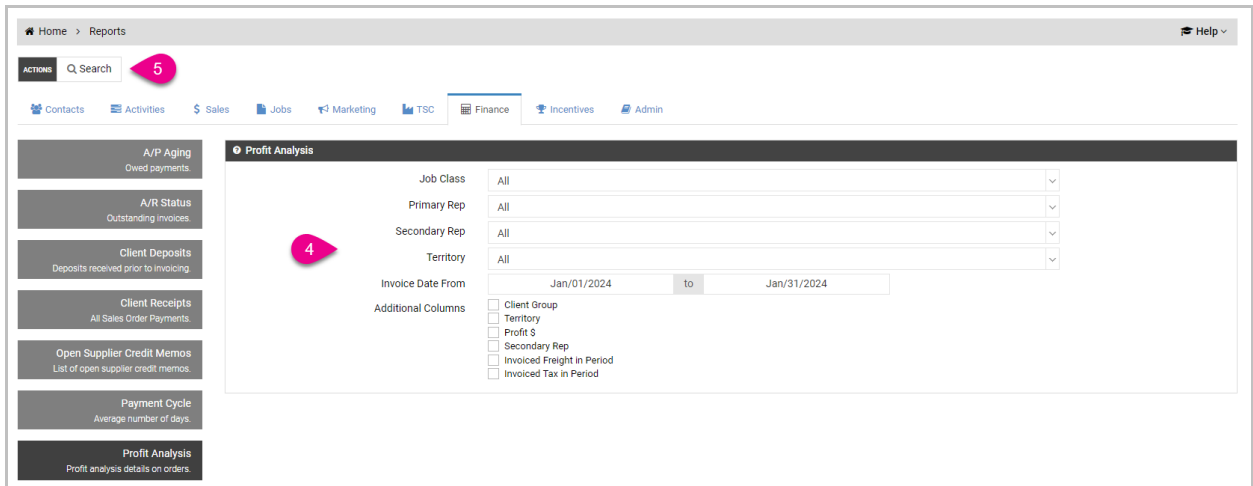
1. Select **Reports** from the left side.

The Reports page opens (default is Contacts tab).

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2. Select **Finance** from the top row.
The Finance Reports are shown in the left column.
3. Select **Profit Analysis**.
The Profit Analysis Report page opens.
Subtitle: Profit analysis details on orders.



4. Complete the following fields to filter the Report:
 - **Job Class**
 - **Primary Rep**
 - **Secondary Rep**
 - **Territory**
 - **Invoice Date From and to:** default: start of current year to today

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- **Additional Columns:** (optional) check box to add:
 - Client Group
 - Territory
 - Profit \$
 - Secondary Rep
 - Invoiced Freight in Period
 - Invoice Tax in Period.

5. Select **Search** in the ACTIONS bar.
The Profit Analysis Report opens.

Home > Reports > Profit Analysis

ACTIONS Excel Select to download

Report: Profit Analysis

Criteria Invoice Date From: [Jan/01/2024] Invoice Date To: [Jan/31/2024]

Drag a column header and drop it here to group by that column

Job #	Client	Invoiced in Period	Invoiced Outside Period	Not Invoiced	Total of Sales	Total Costs	Job GPM%	Commissions	Profit%	Job Status	Primary Rep
146804	Sold To Address	\$160.50	\$0.00	\$5,000.00	\$5,160.50	\$0.00	100.00%	\$2,580.25	50.00%	WIP	Admin JP
162333	Winston Deavor	\$10.00	\$0.00	\$0.00	\$10.00	\$0.00	100.00%	\$10.00	0.00%	Pending	Dever Sales
163207	Sold To Address	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	100.00%	\$50.00	50.00%	Delivered	Admin JP
163208	Sold To Address	\$100.00	\$0.00	\$0.00	\$100.00	\$1.00	99.00%	\$49.50	49.50%	Completed	Admin JP
163549	Beata Dev Us	\$789.70	\$0.00	\$0.00	\$789.70	\$0.00	100.00%	\$789.70	0.00%	Submitted	Admin JP
163571	Harshdeep Singh	\$599.50	\$0.00	\$0.00	\$599.50	\$0.00	100.00%	\$17.99	97.00%	Pending	Sam Adams
164025	Michael Jeannette	\$599.88	\$0.00	\$0.00	\$599.88	\$0.00	100.00%	\$599.88	0.00%	WIP	Admin JP
164026	Michael Jeannette	\$279.80	\$0.00	\$0.00	\$279.80	\$0.00	100.00%	\$279.80	0.00%	Delivered	Admin JP
164027	Michael Jeannette	\$27.98	\$0.00	\$0.00	\$27.98	\$13.99	50.00%	\$0.00	50.00%	Delivered	Admin JP
164030	Jess Poop	\$25.00	\$0.00	\$0.00	\$25.00	\$0.00	100.00%	\$0.00	100.00%	Submitted	Abby Schmitt
164038	Michael Jeannette	\$83.94	\$0.00	\$0.00	\$83.94	\$0.00	100.00%	\$0.00	100.00%	WIP	Admin JP
164441	Jessica Lavoy	\$100.00	\$0.00	\$0.00	\$100.00	\$0.00	100.00%	\$50.00	50.00%	Pending	Admin JP
164518	Winston Deavor	\$10.00	\$0.00	\$0.00	\$10.00	\$6,000.00	-59900.00%	\$-5,990.00	0.00%	WIP	Dever Sales
164542	Jessica Lavoy	\$20.00	\$0.00	\$150.00	\$170.00	\$10.00	94.11%	\$80.00	47.05%	WIP	Admin JP
164647	Beata Dev Us	\$160.00	\$0.00	\$0.00	\$160.00	\$100.00	37.50%	\$15.00	28.12%	Submitted	Abby Schmitt
164657	Andrew Smith	\$27.98	\$0.00	\$0.00	\$27.98	\$0.00	100.00%	\$0.00	100.00%	Submitted	Abby Schmitt
164852	Jessica Lavoy	\$12.00	\$0.00	\$100.00	\$112.00	\$0.00	100.00%	\$56.00	50.00%	Pending	Admin JP
164854	Jessica Lavoy	\$2,500.00	\$0.00	\$0.00	\$2,500.00	\$0.00	100.00%	\$1,250.00	50.00%	Completed	Admin JP
164928	Jessica Lavoy	\$150.00	\$0.00	\$25.00	\$175.00	\$0.00	100.00%	\$87.50	50.00%	Pending	Admin JP
Total(s) 19		\$5,756.28	\$0.00	\$5,275.00	\$11,031.28	\$6,124.99	44.48 %	(\$74.39)	45.15 %		

6. Select (filter icon) on any column to filter the results.
7. Choose the filter criteria from the dropdown menus.
8. Select:
 - **Clear** to undo your selections
 - **Filter** to filter the data in the column.

Profit Analysis Report

The Profit Analysis Report results include all Jobs that have an SO invoiced in the period selected by the User in their search.



NOTES:

- i. If multiple SOs on the same Job were invoiced in the period, only one row is displayed for each Job.
- ii. Total costs include all POs, art charges, and miscellaneous charges that are commissionable, and inventory charges.
- iii. Totals sales represent total before freight and taxes.

The Report displays the following information in columns from left to right:

- **Job #:** the Job number link opens the Job in a new tab.
- **Client:** the Client name link opens the Job in a new tab.
- **Invoiced in period:** total from all SOs in the Job invoiced in the selected date range
- **Invoiced Outside Period:** total from all SOs in the Job invoiced out of the selected date range
- **Not Invoiced:** total of all SOs in the Job not invoiced yet
- **Total Sales:** total sales amount of all SOs in the Job
- **Total Costs:** total costs amount of all SOs in the Job
- **Job GPM%:** GPM% on the Job
- **Commissions:** total commissions on the Job
- **Profit%:** total profit % on the Job
 - Profit % is calculated: $[(\text{Total Sales} - \text{Total Costs} - \text{Commissions}) / \text{Total Sales}] \times 100$
- **Profit\$:** total profit amount on the Job
 - Profit \$ is calculated: $(\text{Total Sales} - \text{Total Costs} - \text{Commissions})$
- **Job Status:** current status of the Job
- **Primary Rep:** Primary Rep on the Job
- **Secondary Rep:** Secondary Rep on the Job; blank if none
- **Client Group:** Client group assigned to the Contact; blank if none
- **Territory:** displayed when selected as additional field
- **Invoiced Freight in Period:** total amount of the freight from SOs invoiced in the selected date range
- **Invoiced Tax in Period:** total amount of the taxes from SOs invoiced in the selected date range
- **[Additional columns, if selected].**

Total amounts are displayed at the bottom of the following columns from left to right:

- Job #



- Invoiced in Period
- Invoiced Outside Period
- Not Invoiced
- Total Sales
- Total Costs
- Job GPM%
- Commissions
- Profit%
- Profit\$
- Invoiced Freight in Period
- Invoiced Taxed in Period.

NOTES:

- i. Total amounts are the total of all the results (not only for those displayed on the page).
- ii. When exporting the report, the total amounts for the columns above are displayed in the exported report as well.

To sort columns:

1. Select the column title to sort the column alphabetically:
Column is sorted A-Z or lowest to highest number.
2. Select again to sort in reverse order.
3. Select once again to return to original order.

To group columns to adjust how the Profit Analysis Report data is grouped:

1. Drag and drop the column header(s) into the field above the Report.
The data in the Profit Analysis Report will be reformatted to reflect your selection(s).
2. Select the **X** beside the column header to undo.

To export a Profit Analysis Report:

1. Select **Excel** in the ACTIONS bar to export the Profit Analysis Report.
The Report will be downloaded to your computer.