Easi BI
Transform your data

VEHICLES – SALESMAN STATS

Update Context

1. View.
2. Other Info.
3. Info Widget.
4. Active Leads.
5. Actual Units vs Average Units.
6. Salesman Units.
7. Salesman GP.
8. Salesman APU.

1. View.

The view consists off all vehicle departments depending on the user set up. If User is set up to a New or Used Department, it will only display that department info. If user set up as New & Used Manager, they can have combined and single view per department.
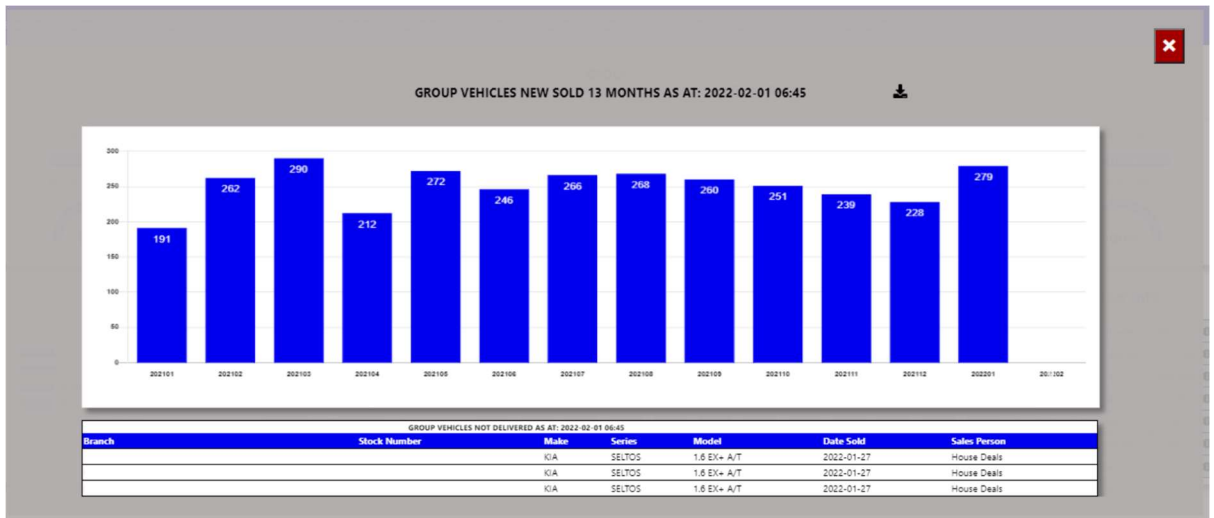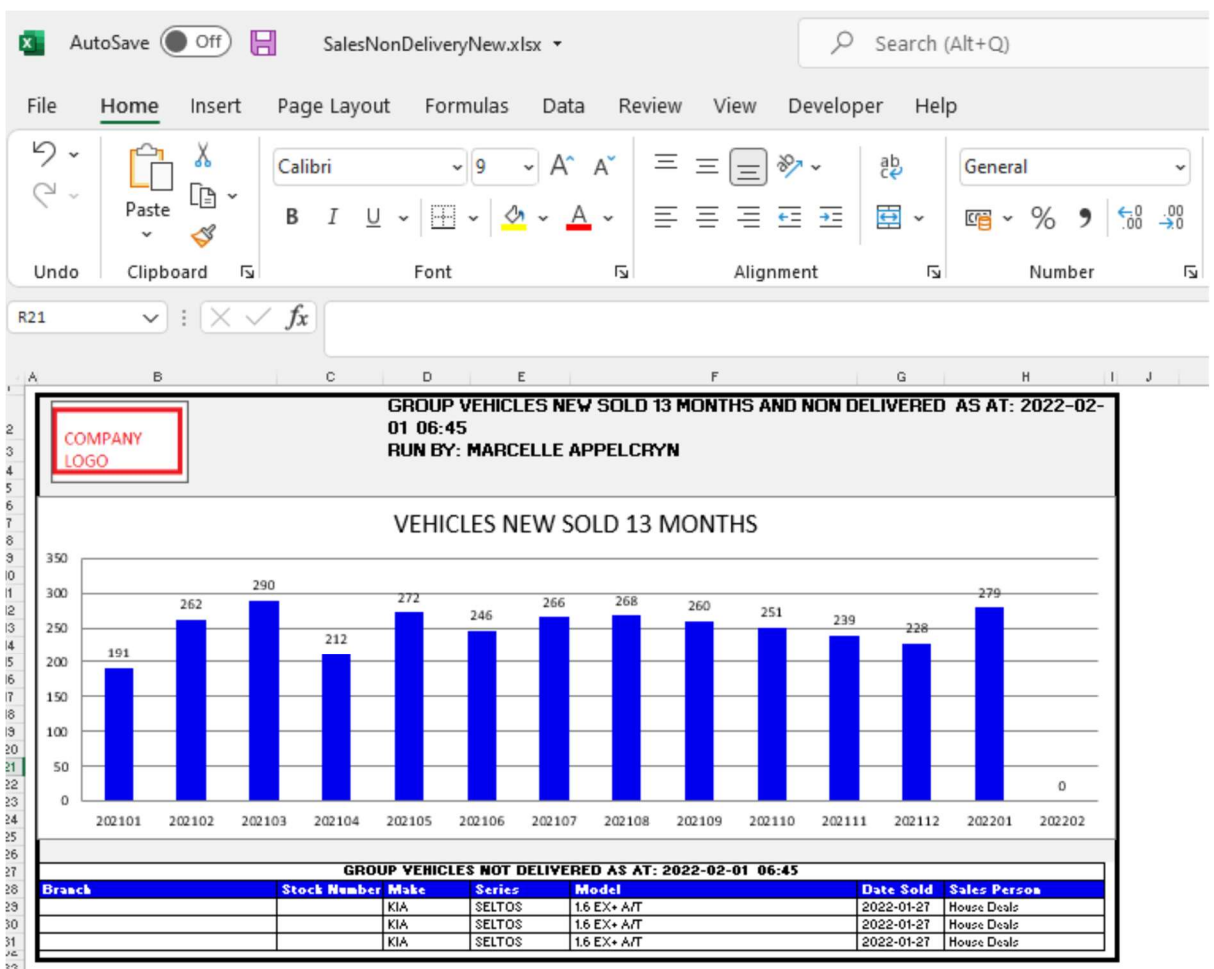

2. Other Info.

a) New Sold vs Delivered – this calculates the number of units sold for the selected month and compares to what vehicles has been marked as delivered.

The Info icon will then display a graph of the last 12 months units and a list of vehicles that has not yet been marked as delivered.

You can then export this to an excel document with graph and the line items.

b) Used Sold vs Delivered – this calculates the number of units sold for the selected month and compares to what vehicles has been marked as delivered.
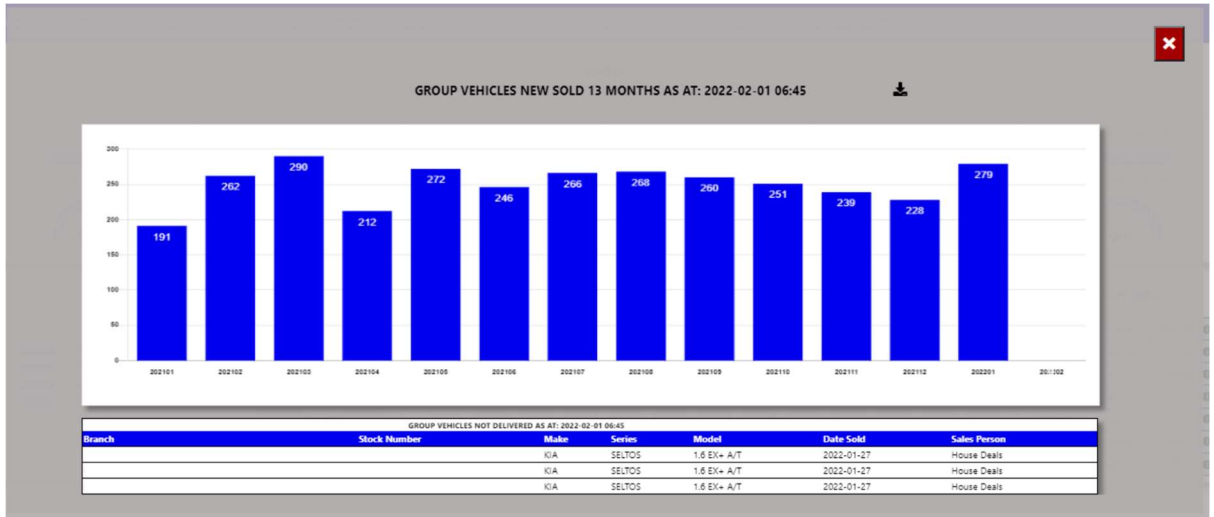The Info icon will then display a graph of the last 12 months units and a list of vehicles that has not yet been marked as delivered.
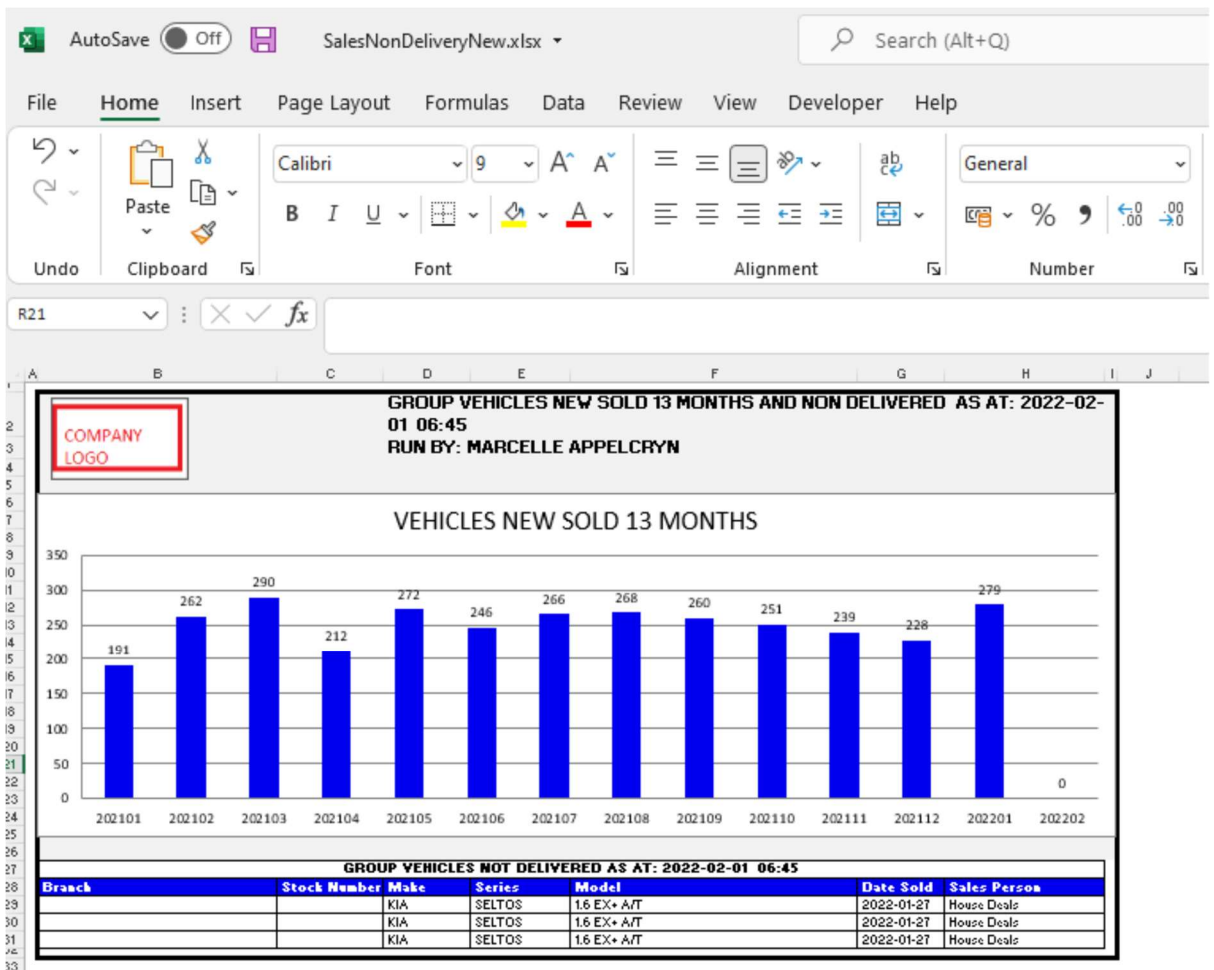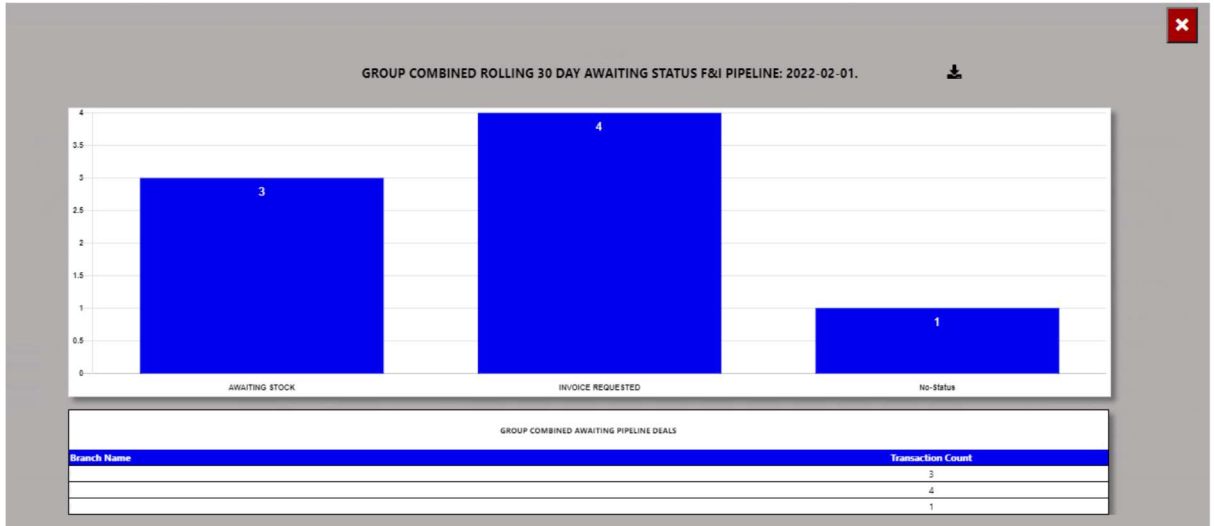

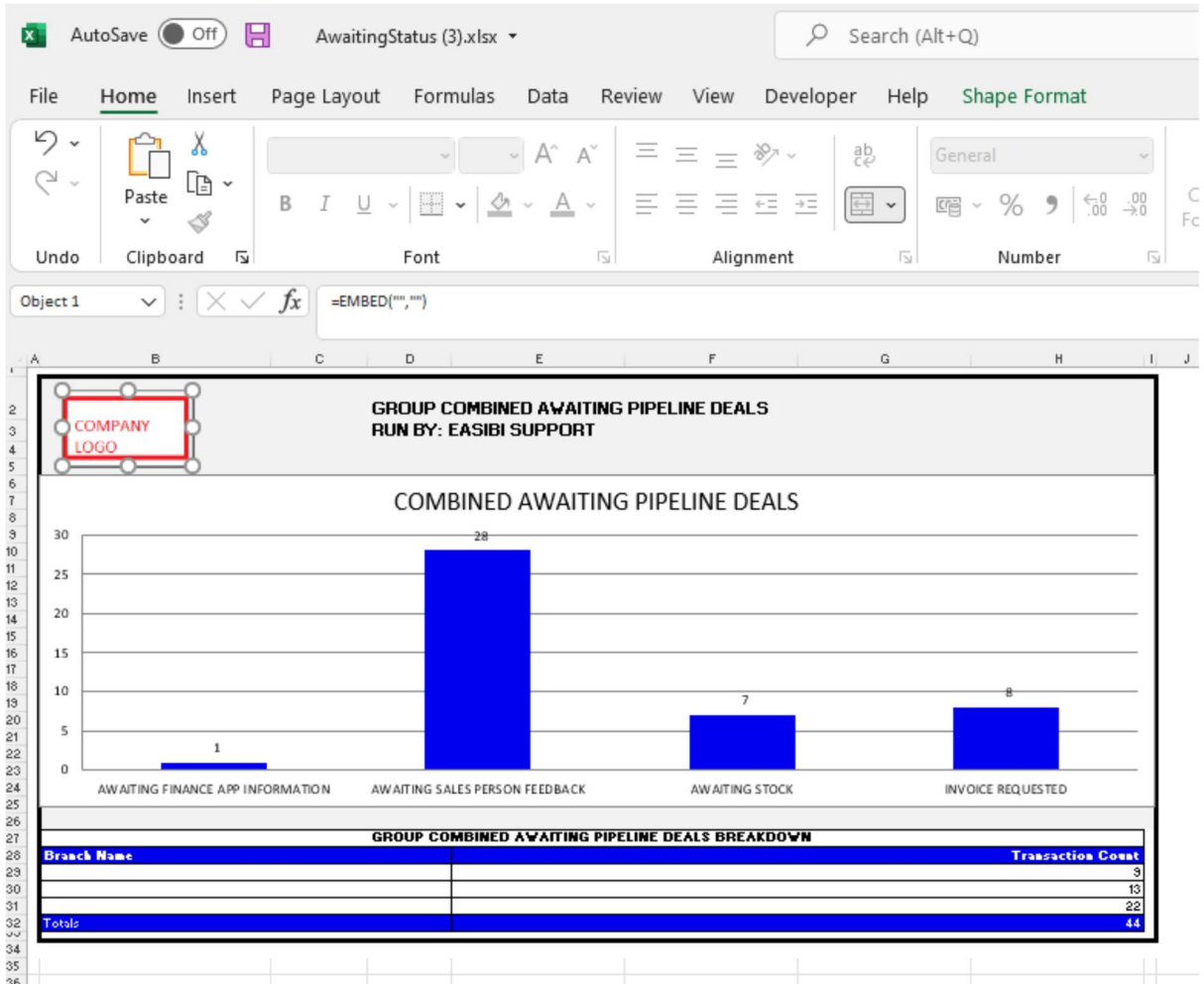You can then export this to an excel document with graph and the line items.

c) F&I Awaiting Status – this calculates from the Seriti F&I system all deals that is in an awaiting status.

The Info icon will then display a graph ageing of each branch and details regarding the Awaiting status of the deal.

You can then export this to an excel document with graph and the line items.

You can click a status, and it will drill down to the transaction and its details. With an option to query this Repair Order from the BI tool.

d) F&I Approved Deals – this calculates the total deals in the F&I system where the status of the deal is approved.

The Info icon will then display a graph each branch / Business Manager and details regarding the Approved status of the deal.
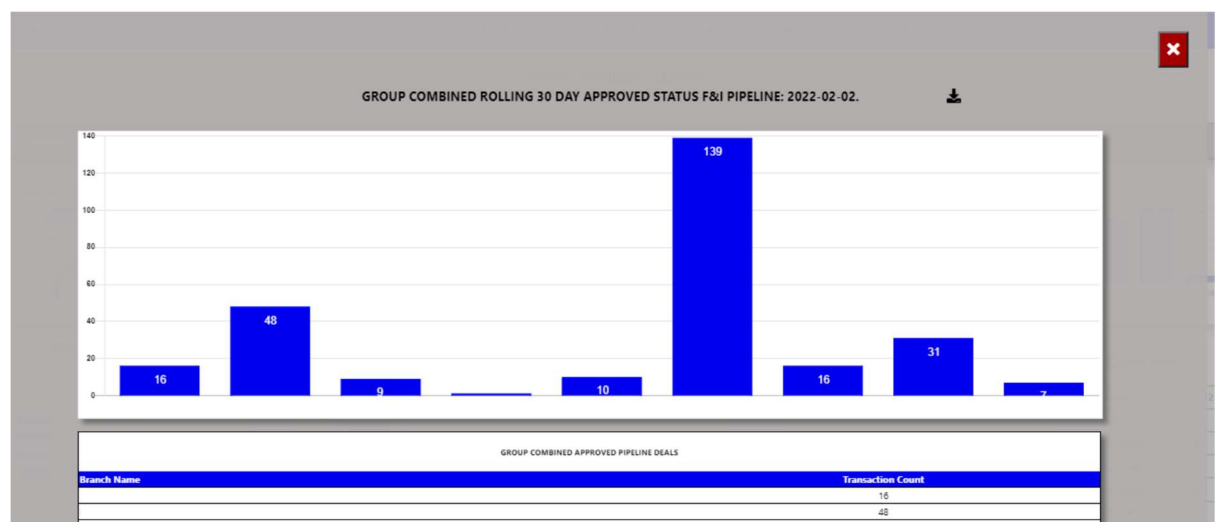
You can then export this to an excel document with graph and the line items.

You can click a status, and it will drill down to the transaction and its details. With an option to query this Repair Order from the BI tool.

Create Mail

Date Created:

2022-01-03

Customer:

MRS DAPHNEY SIBONGILE SMITH

Business Manager:

PEET POTGIETER

Salesman:

COENRAAD KLOPPER
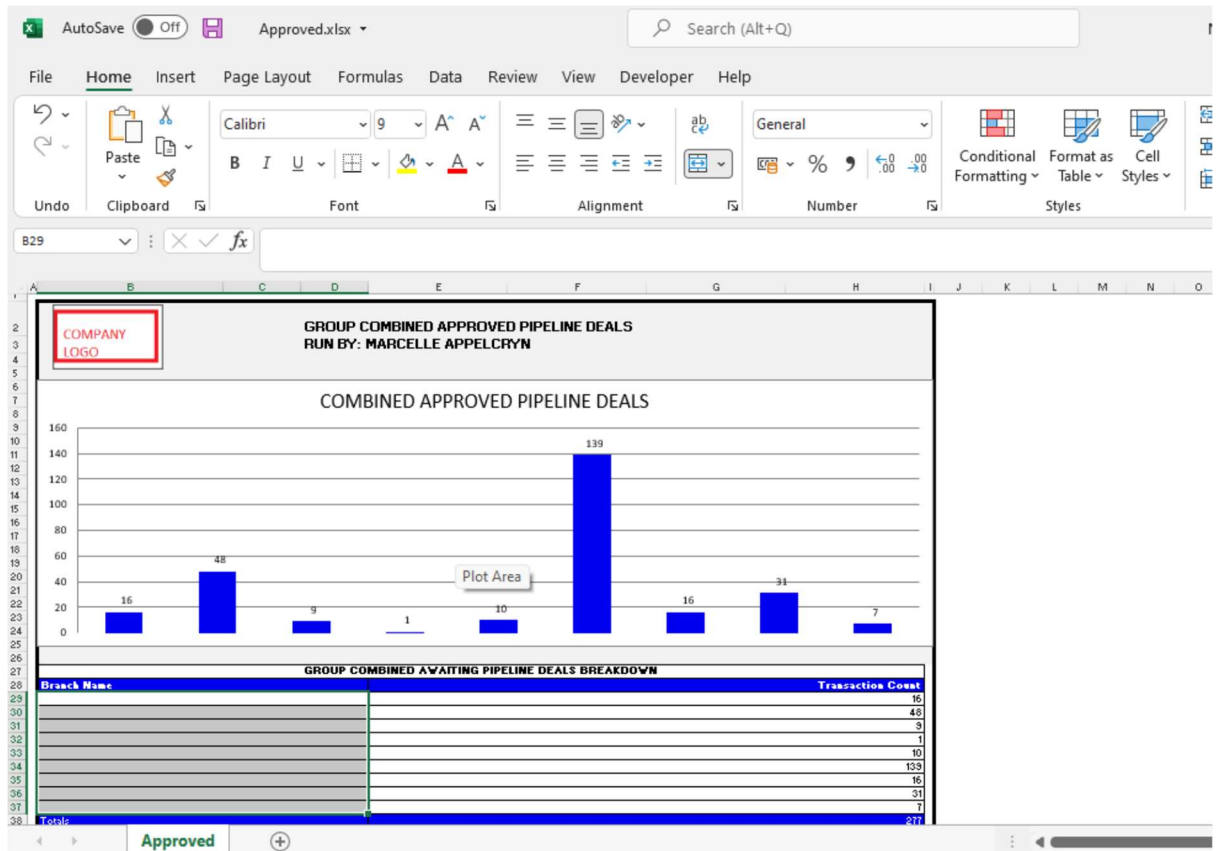
Status:

AWAITING SALES PERSON FEEDBACK

Complete By:

2022/02/01

Action:

Please Type Action Required

Assign To:

EasiBI Support

e) Open Vehicle Orders – this calculates all open order against the vehicles.

The Info icon will then display a graph of all branches open orders and ageing.
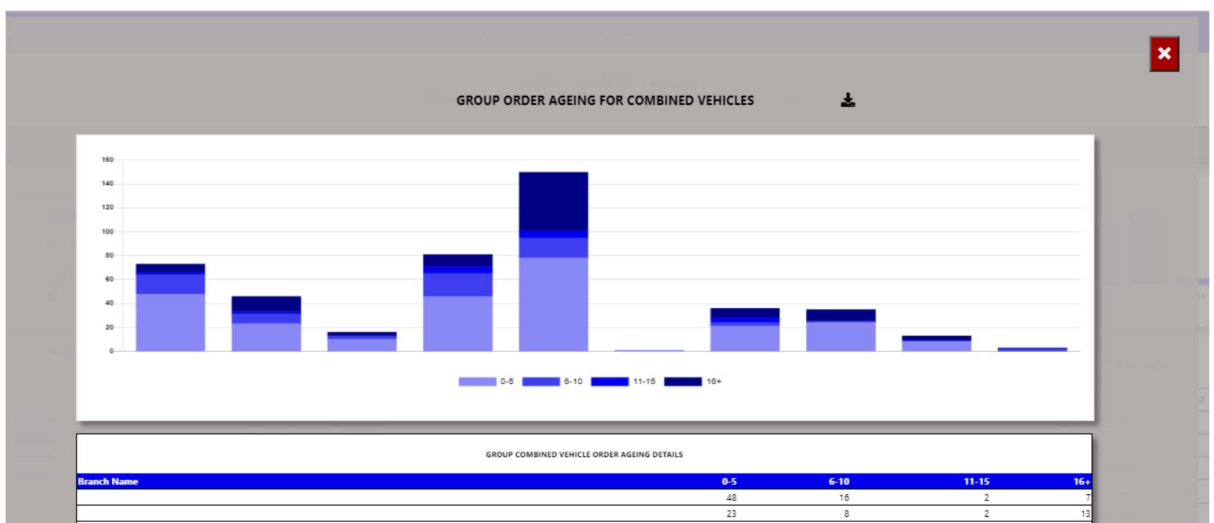
You can then export this to an excel document with graph and the line items.
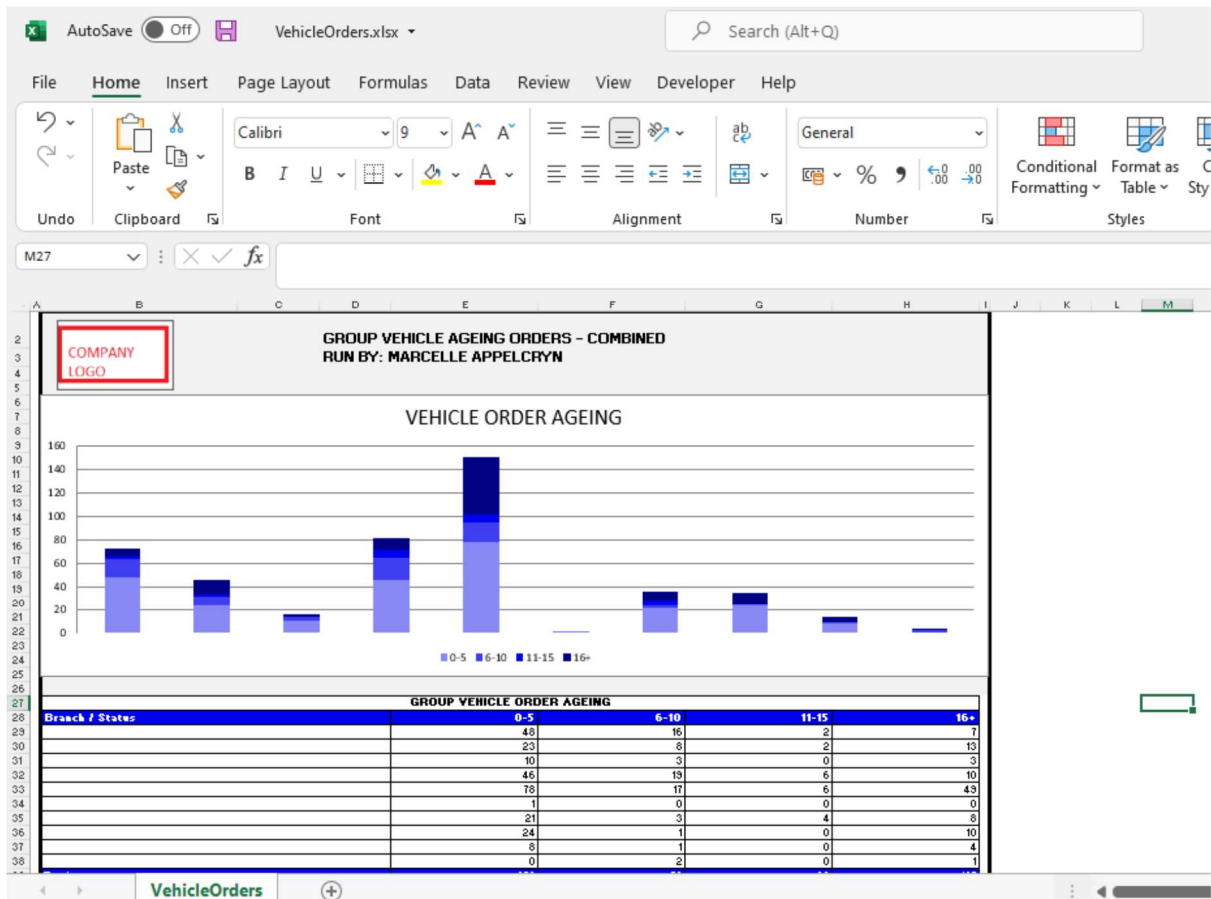
You can click on a age bracket, and it will drill down to the order that has not yet been closed. With an option to query this order number from the BI tool.

f) Open Progress Deals – this calculates the total open deals in the DMS system that has been captured but not yet invoiced.

The Info icon will then display a graph ageing of each branch / Service Advisor depending on the user set up.
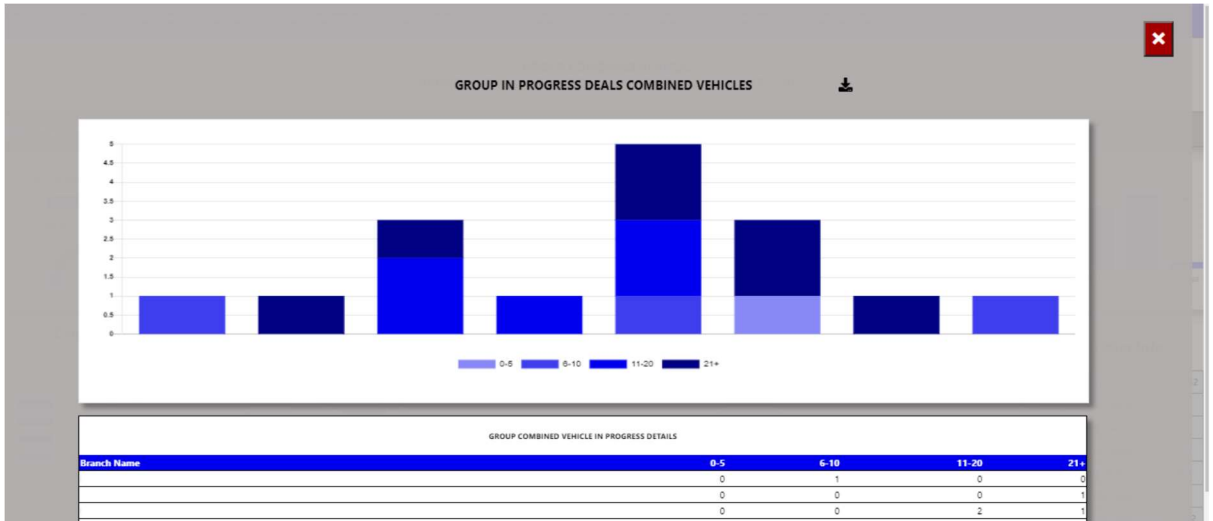
You can then export this to an excel document with graph and the line items.
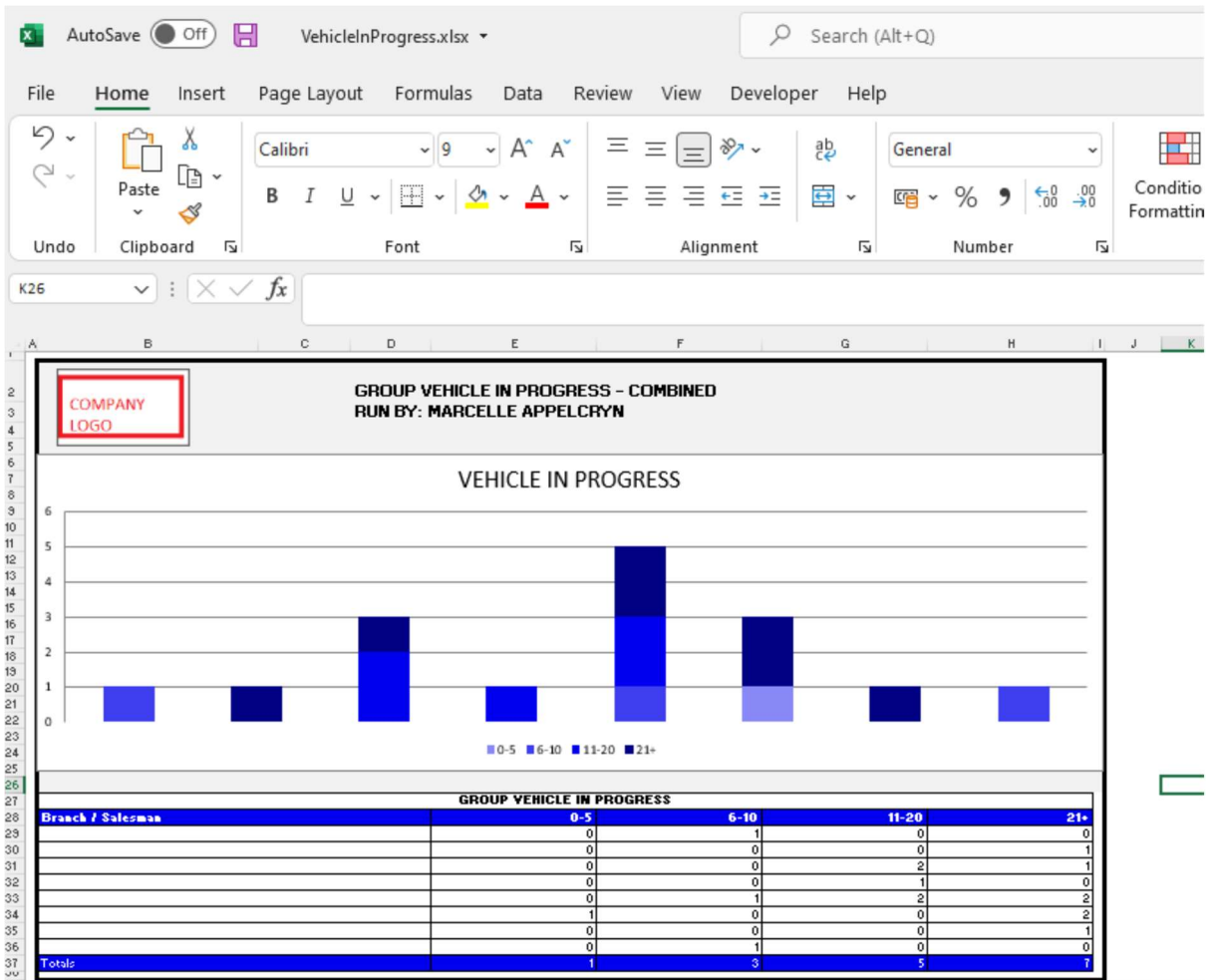
You can click on an ageing bracket, and it will drill down to Open deal. With an option to query this Repair Order from the BI tool.

g) Active Internet Leads – this calculates the Internet Leads received that is still in active status.

The Info icon will then display a graph with leads status rolling 30 days.
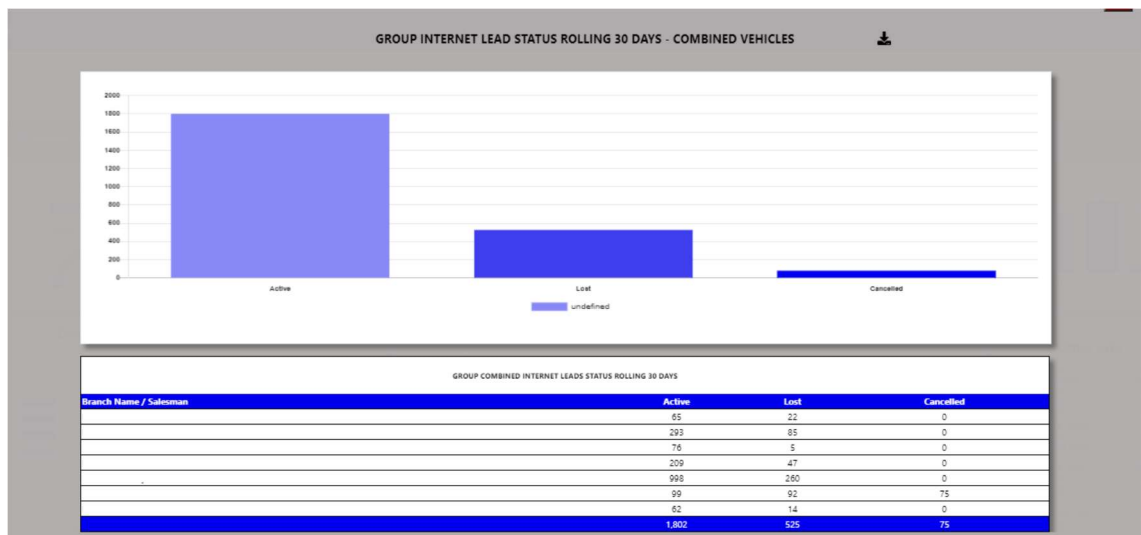
You can then export this to an excel document with graph and the line items.
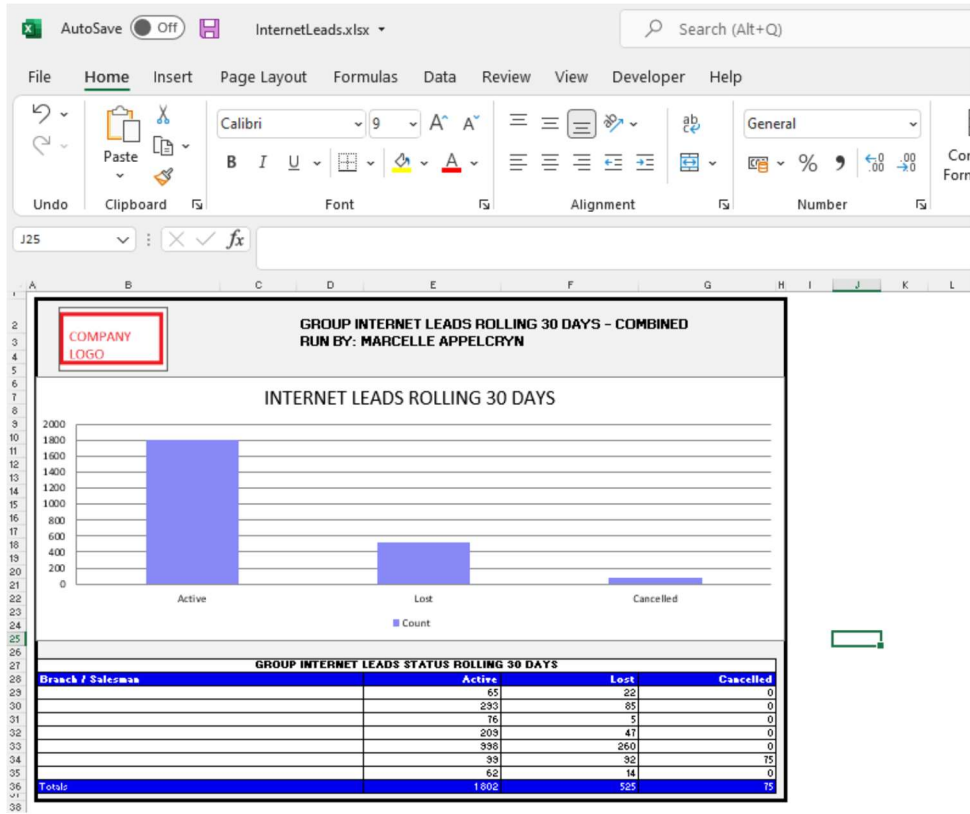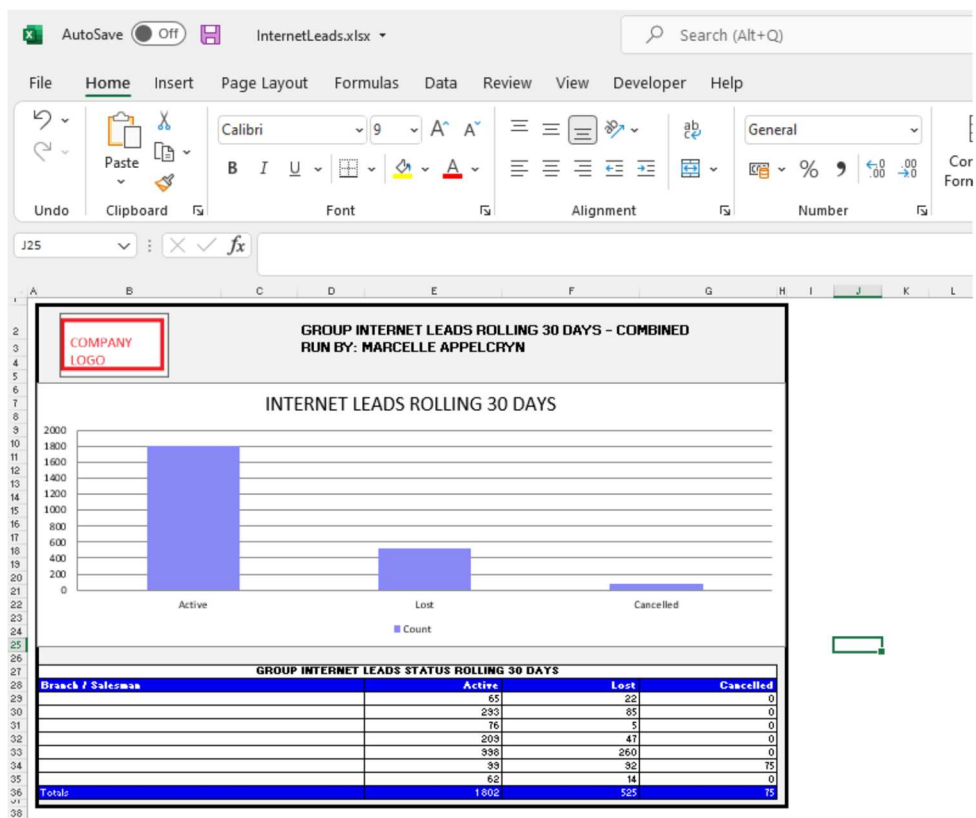
You can click on an ageing status, and it will drill down to leads for that selected status.

📥 _GROUP - COMBINED LEADS FOR STATUS ACTIVE   ❌

Branch	Salesman	Date Created	Date Last Updated	Days Last Updated	Customer	Vehicle	Cancel Reason	Lead Status	Vehicle Type
		2022-01-02	2022-01-03	30	SELLO MAEBELA	FORD RANGER		Active	NEW
		2021-12-21	2022-01-03	30	Tebogo Maabane	FORD FIGO MY21.11		Active	NEW

3. Info Widget.

Depending on selection as above.

Combined Vehicle GP Contribution: 47%

Retail & Fleet Units: 435

Other Sales Units: 152

Average Units 3 Months (R&F): 590

Previous Month Units (R&F): 576

Average Expenses 3 Months: 8,187,456

- Vehicle GP Contribution → This display a calculation of what the department is contributing towards the total Gross profit for all departments.
- Retail & Fleet Units → This calculates the Retail & Fleet Units Sold.
- Other Sales → This calculates the Other Sales of Units.
- Average Units 3 Months (R&F) → Calculates the Average Units sold for the last 3 months (Retail & Fleet).
- Previous Month → Display Units sold previous Month.
- Average Expenses 3 Months → Calculates the department average expenses for the last 3 months.

4. Active Leads.

If User is set up Group, it will display the top 15 Salesman with most active leads in their names. If branch is selected all salesman from that branch will display.

COMBINED - TOP 15 SALESMAN ACTIVE LEADS

The Info icon will then display a graph with leads status rolling 30 days.

GROUP INTERNET LEAD STATUS ROLLING 30 DAYS - COMBINED VEHICLES

GROUP COMBINED INTERNET LEADS STATUS ROLLING 30 DAYS

Branch Name / Salesman	Active	Lost	Cancelled
	65	22	0
	293	85	0
	76	5	0
	209	47	0
	998	260	0
	99	92	75
	62	14	0
	1,802	525	75

You can then export this to an excel document with graph and the line items.

You can click on an ageing status, and it will drill down to leads for that selected status.

5. Average Units vs Actual Units.

This compares Branch / Salesman Average units for the last 3 months to the actual units for selected month.

With the information Icon you can then drill down to Unit / Gross Profit per salesman for the last 12 months.

You can export the above view to excel including the graph and individual salesman details will export for the last 12 months.

AutoSave ⬤ Off AverageUnits.xlsx ▾   🔍 Search (Alt+Q)   Marcel

File Home Insert Page Layout Formulas Data Review View Developer Help

GROUP 12 MONTHS: Combined UNITS SALES
RUN BY: MARCELLE APPELCRYN

VEHICLES NEW SOLD 12 MONTHS

341 | 408 | 466 | 375 | 458 | 399 | 422 | 426 | 401 | 399 | 373 | 360 | 413 | 39
202101 | 202102 | 202103 | 202104 | 202105 | 202106 | 202107 | 202108 | 202109 | 202110 | 202111 | 202112 | 202201 | 202202

GROUP SALESMAN GP 12 MONTHS AS AT: 2022-02-02 11:45

	202102	202103	202104	202105	202106	202107	202108	202109	202110	202111	202112	202201	202202	Total	Average
Total Gross	7 616 749	######	8 808 013	3 203 607	######	######	######	######	######	######	######	######	1 399 061	######	15 121 750
Abri	70 333	248 018	2 385	236 366	380 000	566 023	117 964	236 582	327 434	527 052	- 11 685	0	113 562	2 814 034	171 783
Adele	191 157	183 234	164 060	31 323	408 351	418 414	268 018	108 307	22 371	90 805	0	0	0	1 886 041	30 268
Almarie	155 165	172 783	268 038	116 483	235 633	157 431	140 276	142 063	127 160	343 924	112 844	133 038	7 169	2 112 134	136 602
Andre Brink	0	0	0	0	0	0	0	0	0	0	156 410	118 246	11 687	286 344	91 552
Andrew Jacobs	0	0	0	0	0	0	0	0	0	172 585	- 1500	0	0	171 085	57 028
Anne-marie	78 647	93 565	- 188	52 262	12 672	31 342	0	56 779	39 279	43 564	27 425	79 151	0	526 497	52 047
Anza	212 324	133 961	100 475	142 611	84 663	49 097	75 619	142 441	74 443	129 387	85 428	153 329	0	1 384 377	122 715
Boitumelo Phaka	0	0	0	0	0	0	0	0	0	0	80 082	270 841	6 173	357 096	116 974
Bontle	0	0	0	0	0	0	107 376	91 563	87 070	51 641	31 536	143 043	14 783	593 012	97 407

6. Salesman Units.

If User is set up Group, it will display the top 15 Salesman with most units. If branch is selected all salesman from that branch will display.

COMBINED - TOP 15 SALESMAN UNITS

G D | Abri | Nompumelelo Shabangu | Mbongeni Makukule | David | Raylun | Tumelo | Kobus Sybrand | Christa | Rhuan Pienaar | Tumelo Taotetsi | Johan Du Plessis | Mary | Nicholas | Nontobeko Mbunzi

With the information Icon you can then drill down to Unit / Gross Profit per salesman for the last 12 months.

GROUP TOP 15 SALESMAN USED SALES AS AT: 2022-02-02 13:45 FOR MONTH 202202

Home Branch	Salesman	Units	Retail Incl Discount	Vehicle GP	First GP	Second GP	Total GP	APU	Total GP%
	Christa	1	340,426.09	4,517.39	47,997.10	47,997.10	69,354.72	69,354.72	20.37%
1	Kobus Sybrand	1	404,359.13	50,688.57	52,324.14	52,324.14	56,108.82	56,108.82	13.88%

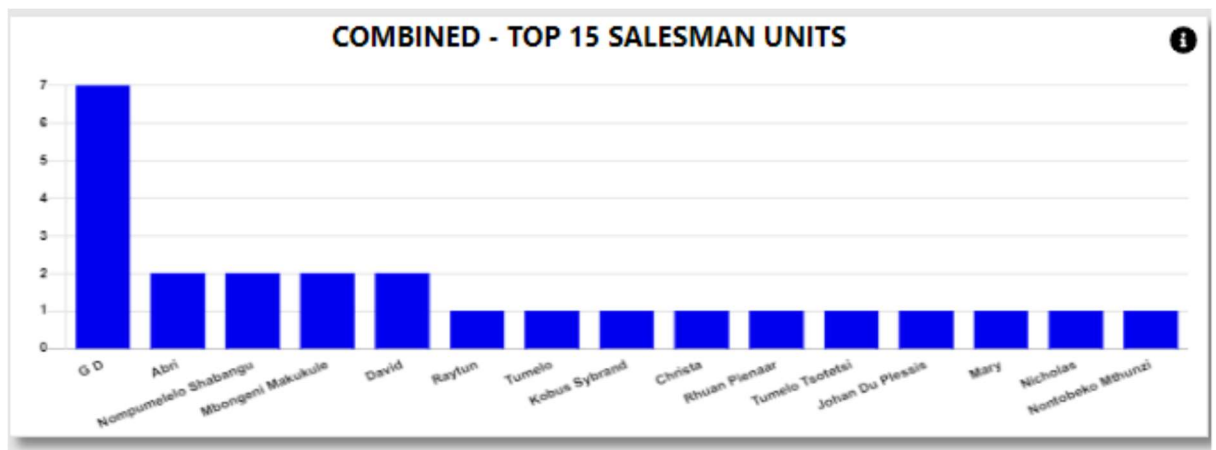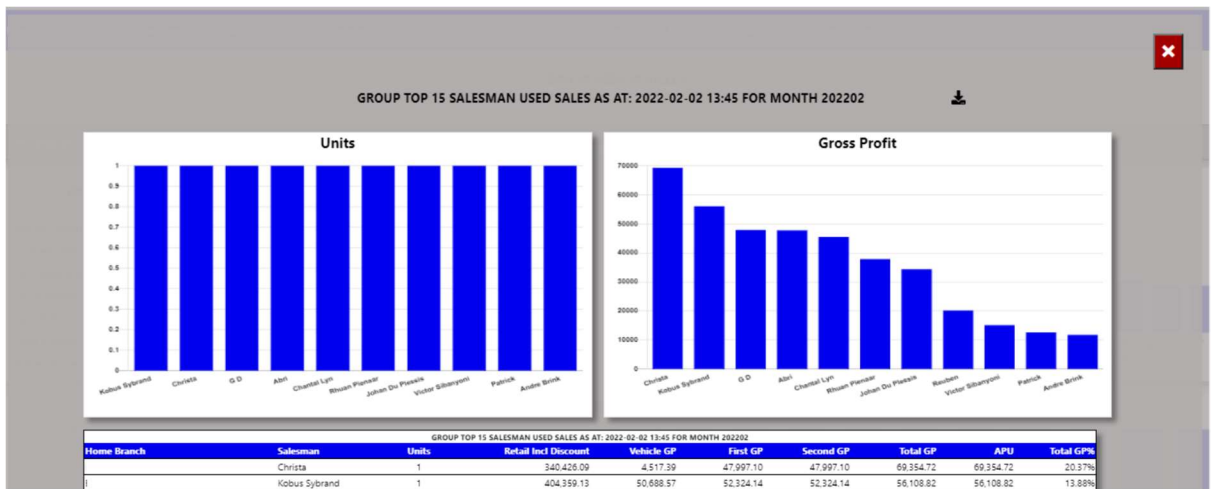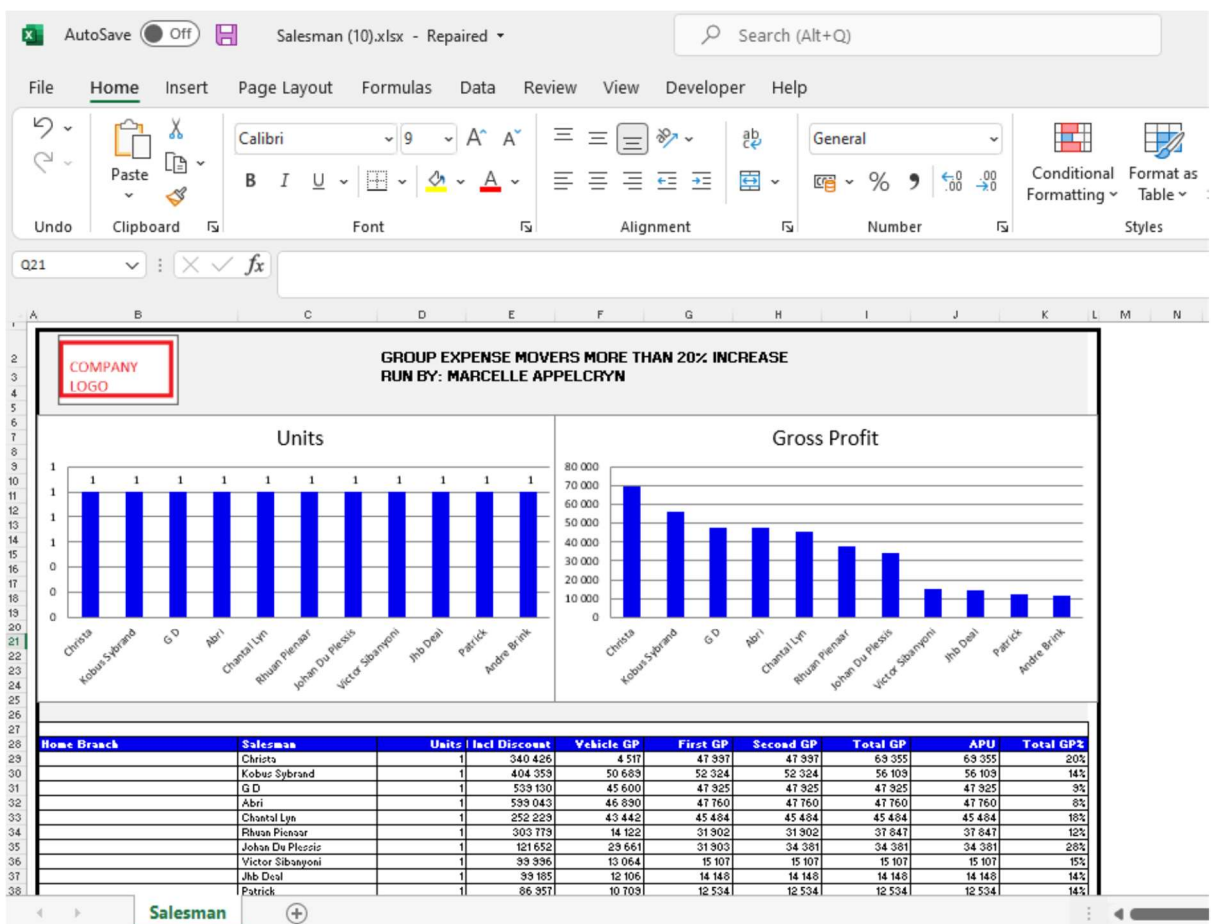You can export the above view to excel including the graph and individual salesman details will export for the last 12 months.

GROUP EXPENSE MOVERS MORE THAN 20% INCREASE
RUN BY: MARCELLE APPELCRYN

| Home Branch	Salesman	Units I Incl Discount	Vehicle GP	First GP	Second GP	Total GP	APU	Total GP%
	Christa	1	340 426	4 517	47 997	47 997	69 355	69 355	20%
	Kobus Sybrand	1	404 359	50 689	52 324	52 324	56 109	56 109	14%
	G D	1	539 130	45 600	47 925	47 925	47 925	47 925	9%
	Abri	1	539 043	46 890	47 760	47 760	47 760	47 760	8%
	Chantal Lyn	1	252 223	43 442	45 484	45 484	45 484	45 484	18%
	Rhuan Pienaar	1	303 773	14 122	31 902	31 902	37 847	37 847	12%
	Johan Du Plessis	1	121 652	29 661	31 303	34 381	34 381	34 381	28%
	Victor Sibanyoni	1	99 936	13 064	15 107	15 107	15 107	15 107	15%
	Jhb Deal	1	99 185	12 106	14 148	14 148	14 148	14 148	14%
	Patrick	1	86 957	10 703	12 534	12 534	12 534	12 534	14%

7. Salesman Gross Profits.

If User is set up Group, it will display the top 15 Salesman with highest gross profit. If branch is selected all salesman from that branch will display.
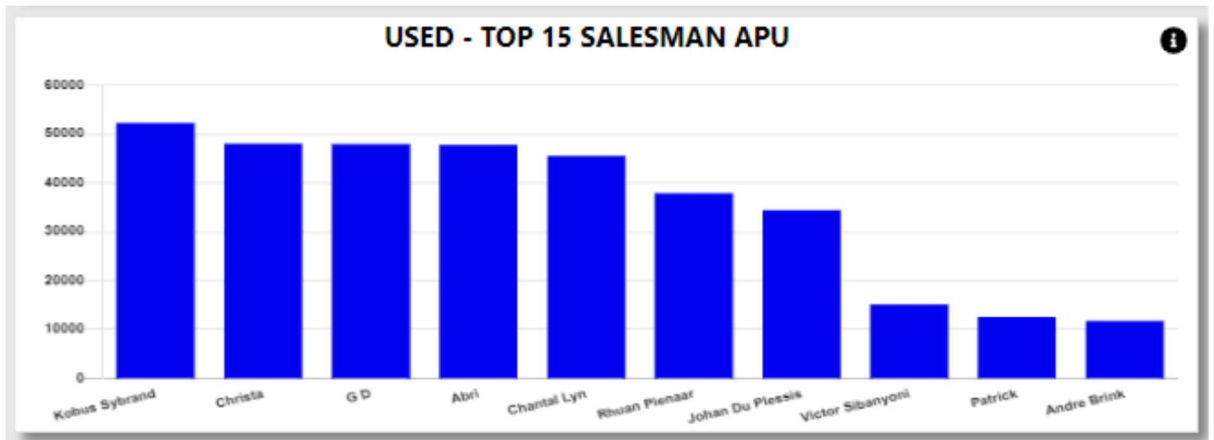

With the information Icon you can then drill down to Unit / Gross Profit per salesman for the last 12 months.
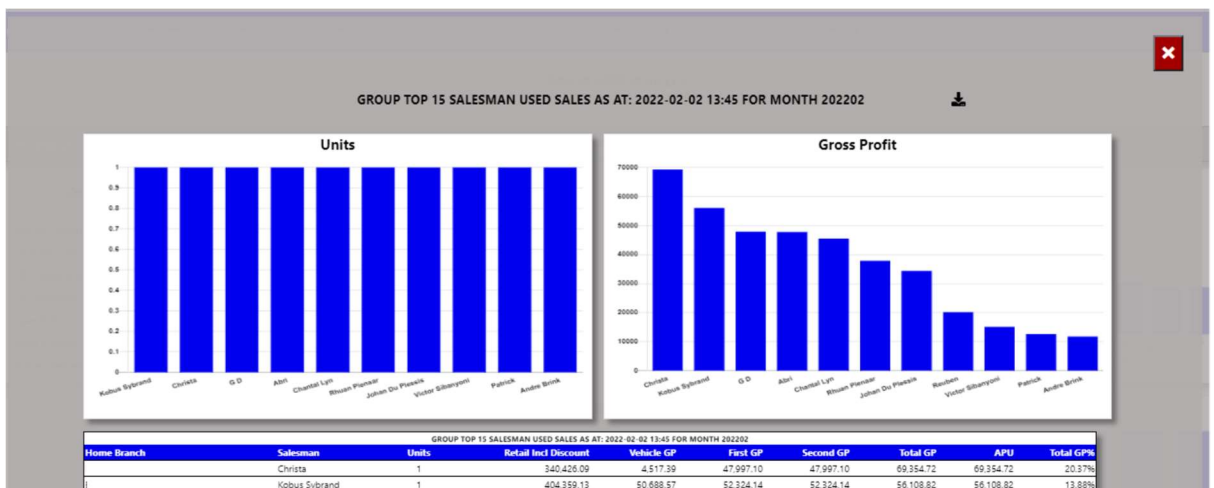
You can export the above view to excel including the graph and individual salesman details will export for the last 12 months.

8. Salesman Average Per Unit.

If User is set up Group, it will display the top 15 Salesman with highest average per unit. If branch is selected all salesman from that branch will display.

With the information Icon you can then drill down to Unit / Gross Profit per salesman for the last 12 months.
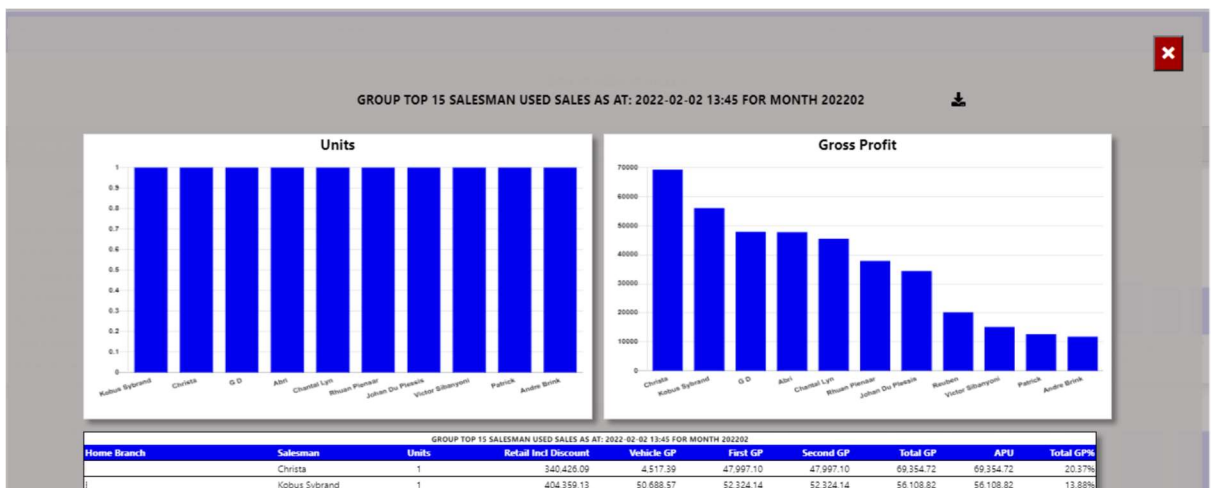

You can export the above view to excel including the graph and individual salesman details will export for the last 12 months.

Q21

GROUP EXPENSE MOVERS MORE THAN 20% INCREASE
RUN BY: MARCELLE APPELCRYN

COMPANY LOGO

Units

Gross Profit

Home Branch	Salesman	Units	Incl Discount	Vehicle GP	First GP	Second GP	Total GP	APU	Total GP%
	Christa	1	340 426	4 517	47 997	47 997	69 355	69 355	20%
	Kobus Sybrand	1	404 359	50 689	52 324	52 324	56 109	56 109	14%
	G D	1	539 130	45 600	47 925	47 925	47 925	47 925	9%
	Abri	1	599 043	46 890	47 760	47 760	47 760	47 760	8%
	Chantal Lyn	1	252 229	43 442	45 484	45 484	45 484	45 484	18%
	Rhuan Pienaar	1	303 779	14 122	31 902	31 902	37 847	37 847	12%
	Johan Du Plessis	1	121 652	29 661	31 903	34 381	34 381	34 381	28%
	Victor Sibanyoni	1	99 336	13 064	15 107	15 107	15 107	15 107	15%
	Jhb Deal	1	99 185	12 106	14 148	14 148	14 148	14 148	14%
	Patrick	1	86 957	10 709	12 534	12 534	12 534	12 534	14%

Salesman