

# Monthly Sales Report

This playbook describes the steps to create and send a monthly sales recap email to the executive team using sales data from the company dashboard.

## Step 1: **Log In**

Navigate to the sales dashboard website and log in with your credentials. If you do not have credentials, contact IT for assistance.

## Step 2: **Access Reports**

Once logged in, go to the reports page, which is found under a dropdown menu in the top right of the dashboard.

## Step 3: **Select Date Range**

Choose the correct date range for the report, which should include the first and last day of the previous month, to avoid incomplete data.

## Step 4: **Download Data**

Download the report data in a CSV file format by clicking the download button.

## Step 5: **Create Pivot Table**

Open the CSV file in Excel and create a pivot table to display the revenue breakdown by day, with one column for the date and another for revenue.

## Step 6: **Copy to Email**

Copy the pivot table into an email, ensuring the formatting remains intact to maintain a professional appearance.

## Step 7: **Send Email**

Address the email to the executive team at 'executives@yourdomain.com' and send it on the first business day of the month.

# **General Notes**

## **Timing**

Prepare and send the email on the first business day of the following month to ensure prompt delivery of the report.

## **IT Support**

If logging in or other technical issues arise, contact IT support promptly to resolve the issues.

## **Date Selection**

Be careful when selecting the date range for the report to avoid choosing the current month's dates and causing incomplete data.