

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.