

Automotive Variable Sales Journal

Welcome! This Microsoft Excel® workbook that you're about to utilize has been designed to assist the Variable Sales Manager and/or a Finance and Insurance Department Manager. In general the goal of this workbook is to track and report Gross Profit generated by **all** Variable Sales Departments, New Car Sales, Used Car Sales, Finance & Insurance and Aftermarket Product Sales.

It is designed to be used on a **Daily Basis** for summarizing **Month-to-Date Sales** activities with the end results being a detailed Monthly New and Used Vehicle Sales Performance Report. Its Detailed Summary Report does all the calculations and the workbook is capable of tracking over 500 unit sales for any given month.

It also has the capability of tracking both physically delivered new and used units and pending sales. Allowing you the user to view Actual Gross Profit generated per sale type **Delivered Month-to-Date** and **Open/Pending Delivery** Gross Profit Opportunities. All controlled by entering an actual Physical Delivery Date on the Sales Log.

As for the management of this Excel® Workbook ~ Sales Log, it is extremely user-friendly since it incorporates active Macros (Visual Basic) and color coding to simplify its usage. Input data may only be entered into **YELLOW CELLS** and the remaining cells, plus the workbook is password protected to avoid user entry and usage errors.

Also, per the request of many Variable Sales personnel a Commission Calculation reporting worksheet has been added which calculates Commissions Earned Month-to-Date by simply entering a payout percentage per sale type. Click the Forms Button on the Summary Worksheet ~ Main Menu called **Commission Calculator** to access.

Also, per the request of multiple workbook users the ability to **modify two of the column headings** within the Finance Department has been made available. Currently by default these income opportunity concerns are referred to as "Insurances" and "Aftermarket". You as a user may go to the "Sales Delivery Log 1" from the Summary Report and modify these headings within the yellow cells.

You may also change the column heading which by default is referred to as "Comments" to anything you see fit. For example "Sales Manager". Column headings do have character length limits; Insurance column 10, Aftermarket column 12 and Comments column 25.

Getting Started and how to use this workbook

Color Coding is utilized to simplify usage on all the spreadsheets. **You may only enter data within cells that are Yellow in Color.** All others are protected.

The workbook itself, which is protected, has unique Excel programming features implemented such as forms buttons which are Macro driven. You will **never need to locate a Worksheet Tab**, just click a forms button to navigate through this workbook. A majority of the forms buttons are located on the Summary Report. They are grey in color and all reports and 12 individual sales logs are accessed by clicking them. To return to the Summary Report, just click the Summary Report forms button on any page.

Sales Worksheet Headings and Mandatory Spreadsheet Entries

Type - N or U: Enter a 'N' for New Vehicle Sale or 'U' for a Used Vehicle Sale. This **mandatory** entry identifies the Sales Department which generated the income.

Delivery Date - The delivery date is a **mandatory** entry which finalizes a transaction and includes **Gross Profit Values** within the Sales Summary Report.

Total Gross Profit spreadsheet cells, New and Used will remain **RED** until a physical delivery date is entered and Total Gross Profit (New & Used) will equal zero.

Pending/Open potential Gross Profit values will be included in worksheet totals and cumulative totals on Sales Delivery Logs 1 thru 12, . but will Not be included in the Sales Summary Report until the Sales Log ~ Physical **Delivery Date** has been entered.

Finance & Insurance Department Gross Profit: Enter the actual dollar value of income generated with the finance department for each sale type.

Total Gross Profit: Self-calculating income totals for each sale type, N-New or U-Used. Entries are not made within these protected cells.

General Sales Reference Information: The usage of the Comment fields is not mandatory. E.g. Comment field could be the pending delivery date.

!!! Unit Sales Counts are calculated based on dollar value entries. If you have "Zero Dollar Gross Profit" on any sale type !!! and would like to count the unit sale, enter a value of at least \$ 0.01.