Kayla’s Top 5 Favorite RetailEdge Reports

Blog · https://retailedge.com/docs/retailedge-reports

Hi guys, Kayla here – You may know me from talking on the phone in the sales department! I’ve been working for RetailEdge for over 10 years, and during that time, I’ve spoken with many of you who ask for certain data from the reports, but don’t know how to get to it or where to find it. And I get it! Our reporting suite is massive – there are literally hundreds of reports you can run with dozens of filters each. We use RetailEdge every day to run the business that is RetailEdge, so coming from the sales department, my favorite reports have to do with sales, customers, and a little inventory. I’m here to give you my top 5 favorite reports that I think you may also find useful. For all reports, just type the name of the report in the search bar! And don't forget to MEMORIZE them so you can quickly access them later.

SALES BY CUSTOMER (SORTED BY GROSS PROFIT)

If you have repeat customers and are tracking them in RetailEdge, Sales by Customer sorted by Gross Profit is one of the best reports to run to see who exactly is spending the most money in your store AND giving you the largest profit margin. I like to filter this using a certain date range (For example, January 1 – November 1 to find our top customers for the year.) You can create a marketing campaign for these customers and email them a thank you note, coupon, or put them in a drawing for a prize. It’s good to know who in your community is supporting you the most and take care of them.

SALES BY CATEGORY – GROUPED BY DEPARTMENT

In the Include/Group list, click the bubble for Department Only. If you are multi-location, you can either check or uncheck the “group by location” checkbox.

From here, navigate down to the department filter. Here you can check all departments or only the ones you want to see sales for. There are tons of different filters here – use sparingly! You could filter on a certain promotion code, include EBT (or only non-EBT) items, even certain vendors. Remember: the more you filter, the more narrow the results will yield.

Sales by category is a great little report that breaks down your sales by department so you can see which departments are performing (or not performing). It gives you quantity, cost, price, gross profit, discount, margin, and % of total sales in the certain date filter.

COMPOUND – SOLD BY ITEM

This report displays the quantity of items sold in each month and the current on-hand. If the date range selected is larger than 365 days, the overlapping months from different years will be tallied in the same column.

I like to filter this report using “Last Action Date”. I typically set it to the last 6 months so the report only includes items that have had recent activity. This helps focus on active inventory and excludes older or dead stock that hasn’t been touched in a long time. **Last Action Date** refers to the most recent date that *any activity or change* occurred for an item in RetailEdge. This includes sales, receiving inventory, adjustments, transfers, price changes, description edits, or other modifications to the item record.

If you sell fast fashion and are constantly turning over your inventory, this report may not be for you. But for those who sell a lot of the same items year-round, this is a good one to have in your back pocket.

VISITS

Visits is a great report that shows how many times your customers shop with you for a given time. Again, you can get a feel for who your most loyal shoppers are. You can compile the data to send a targeted email campaign to reward them. OR, in my next RetailEdge report, you can see who HASN’T been in your store in a while, who you can send a text or email to with a coupon and entice them back into your store.

CUSTOMER NONSELLERS REPORT

Type “sellers” into the search bar. Click the one that says “Nonsellers” under the Customer folder. Enter a date range. Maybe also a date-created filter to look for customers who were created within a certain time frame as well. This will generate a report on customers who have NOT had any visits or sales in the date range you set. This report is great because email is a column that you can export

out into an excel file for you to import into an emailer platform like Mailchimp or Constant Contact for marketing and retention purposes.