



## Reporting Guidebook

**See your data as it happens then build detailed reports with Excel power.**

# PeopleVine Reporting Dashboard

PRE-BUILT AND CUSTOM REPORTS <https://control.peoplevine.com/reporting>

In the Reporting Dashboard you'll find pre-build reports for major components in PeopleVine in addition being able to build your own reports that can grow in Excel.

## CRM Reports

CRM reports provide real-time insight on how people are being segmented.

## Revenue Reports

This includes a combination of reports for recurring and one-time revenue streams.

## Additional Reports

Simple and quick reports we thought you could leverage, but not categorized yet.

## Commerce Reports

Commerce reports help you manage overall sales and inventory coming from your website and POS.

## Membership Reports

Stats on how your members and loyalty members are engaging with your ecosystem.

## Build Your Own Reports

Quick and easy and works on any device.

CRM Reports

CRM reports provide real-time insight on how people are being segmented.

People Demographics (Age + Gender)

Group Stats

Segment People

People Filter

Customer Spend Report

Customer Demographics

PRINT

3,819

Total People

31 %

1,191 Male

27 %

1,030 Female

NOT SHARED  
1,598 (42 %)  
AGE RANGE  
up to 86  
(avg: 42)

1,678

Total Active Members (44 %)

53 %

893 Male

47 %

783 Female

NOT SHARED  
2 (0 %)  
AGE RANGE  
22 to 83  
(avg: 46)

AGE GROUP	ALL	MEMBERS	AGE GROUP	ALL	MEMBERS
Under 21	111 (3 %)	0 (0 %)	51 to 55	352 (9 %)	230 (14 %)
21 to 25	207 (5 %)	43 (3 %)	56 to 60	259 (7 %)	164 (10 %)
26 to 30	472 (12 %)	140 (8 %)	61 to 65	152 (4 %)	76 (5 %)
31 to 35	340 (9 %)	148 (9 %)	66 to 70	84 (2 %)	51 (3 %)

Industry:

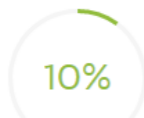
TOTAL TAGS:  
839

OPTED IN TO E-MAIL:  
813 (98%)

OPTED IN TO SMS:  
800 (97%)

**SORTING OPTIONS:**  
Sort Alphabetically  
Sort by Volume  
Showing All People  
Show Only Active Members

829 People Tagged



87 Real Estate



61 Finance



24 Other



24 Technology

Filter by Date:

10/01/2019

10/31/2019

Search For:

Sort By:

By Most Commerce Spend

Membership Level:

Show All

APPLY

Options

Member's Only

CUSTOMER SPEND REPORT

[view all transactions](#)

Customer	Company	Total Revenue	Subscription Revenue	Commerce Revenue
<a href="#">Bill Robinson</a>	Space Management	\$59,060.35	\$0.00	\$59,060.35
<a href="#">Alfred Noble</a>	Software Inc.	\$22,503.28	\$0.00	\$19,399.28
<a href="#">Jane Scott</a>		\$19,015.09	\$0.00	\$18,673.59
<a href="#">Deborah Washington</a>	Alpha Stone	\$12,993.70	\$0.00	\$11,813.70
<a href="#">Brady Jackson</a>	Computers Corp	\$12,314.14	\$827.59	\$11,486.55
<a href="#">Ray Simmons</a>	Steam Systems	\$10,293.09	\$0.00	\$10,293.09

## Commerce Reports

Commerce reports help you manage overall sales and inventory coming from your website and POS.

Location Revenue

Sales Stream

Sales Report

Pull Queue

Ship Queue

Filter by Date:

10/01/2019

10/31/2019

Sort By:

By Location

APPLY

### LOCATION REVENUE REPORT

[view all transactions](#)

Location	Revenue	Member Revenue	Orders	Member Orders	New Members	Existing Members
<a href="#">Jamie's Cookhouse</a>	\$425,488.06	\$121,381.51 (28.53 %)	7,476	1,893 (25.32 %)	88 (1.18 %)	1,805 (24.14 %)
<a href="#">Hendricks</a>	\$652,520.97	\$75,714.24 (11.60 %)	5,961	791 (13.27 %)	57 (0.96 %)	734 (12.31 %)
<a href="#">Sour Pickle</a>	\$260,874.06	\$32,054.75 (12.29 %)	5,457	601 (11.01 %)	74 (1.36 %)	527 (9.66 %)
<a href="#">Eat My Sandwich</a>	\$292,022.75	\$81,926.39 (28.05 %)	4,776	1,108 (23.20 %)	101 (2.11 %)	1,007 (21.08 %)

### PRODUCT SALES REPORT

EXPORT

Sort by:

Select Sort By

Brand:

No Businesses Exist

Date:

10/01/2019

to

10/31/2019

APPLY

Below are the products sold based on your search.

Product	Total Sold	Avg. Per Order	Avg. Price	Total Sales	Total Customers	Total In Stock	Last Sold	First Sold
<a href="#">Casamigos Tequila</a>	15,711	2	\$15.62 \$0.00-\$27.00	\$245,347.00	410	986,946 in stock Avg. Cost: \$0.00	10/26/2019	12/20/2018
<a href="#">Titos</a>	11,993	2	\$9.74 \$0.00-\$18.00	\$116,799.00	381	991,376 in stock Avg. Cost: \$0.00	10/26/2019	12/21/2018
<a href="#">Iced Tea</a>	3,996	2	\$2.50 \$0.00-\$2.50	\$9,985.00	233	0 in stock Avg. Cost: \$0.00	10/26/2019	12/20/2018
<a href="#">The Usual</a>	3,471	2	\$14.52 \$0.00-\$15.00	\$50,392.18	162	997,032 in stock Avg. Cost: \$0.00	10/26/2019	1/10/2019
<a href="#">Topo Chico</a>	3,137	2	\$4.00 \$0.00-\$4.00	\$12,548.00	207	997,551 in stock Avg. Cost: \$0.00	10/26/2019	1/5/2019
<a href="#">Silvan Ridge, PN GLS</a>	2,916	2	\$12.98 \$0.00-\$13.00	\$37,856.01	175	0 in stock Avg. Cost: \$0.00	10/26/2019	12/20/2018
<a href="#">Grey Goose</a>	2,831	2	\$12.24	\$34,640.00	145	998,092 in	10/26/2019	12/21/2018

### Revenue Reports

This includes a combination of reports for recurring and one-time revenue streams.

Service Report

Subscription Report

Transaction Report

Customer Spend Report

Pending Revenue	Projected MRR	Projected ARR	New This Month	New Past 30 Days	New Past 90 Days	New YTD	New Revenue This I
\$0.00	\$0.00	\$54,125.00	0	0	0	8	\$0.00
\$0.00	\$0.00	\$5.00	0	0	0	0	\$0.00
\$270.62	\$66,031.28	\$792,390.00	11	12	79	234	\$3,043.54
\$1,623.78	\$9,201.42	\$110,415.00	0	0	0	0	\$0.00
\$0.00	\$26,792.04	\$321,503.16	1	2	6	23	\$0.00
\$0.00	\$15,425.34	\$185,107.50	2	4	9	48	\$278.46
\$541.24	\$13,125.07	\$157,503.75	1	2	8	61	\$1,670.84
\$2,435.67	\$357,231.60	\$4,286,700.00	18	22	90	567	\$28,859.25

Date:  to:

LOCATION	GENERAL	PARK HOUSE DALLAS	TOTAL
<b>New Subscriptions</b>	0 (0.0%)	65 (100.0%)	65
<b>Total Revenue</b>	\$593,590.64 (45.9%)	\$698,883.57 (54.1%)	\$1,292,474.21
Total Transactions	1,265 (26.0%)	3,595 (74.0%)	4,860
General Revenue	\$380,101.98 (100.0%)	\$0.00 (0.0%)	\$380,101.98
Event Revenue	\$9,721.96 (100.0%)	\$0.00 (0.0%)	\$9,721.96
Membership Revenue	\$64,721.67 (29.1%)	\$157,881.42 (70.9%)	\$222,603.09
Order Revenue	\$137,931.11 (20.3%)	\$541,002.15 (79.7%)	\$678,933.26
Subscription Revenue	\$1,113.92 (100.0%)	\$0.00 (0.0%)	\$1,113.92
<b>Total Check-Ins</b>	1,659 (65.9%)	860 (34.1%)	65
Membership	1,659 (65.9%)	860 (34.1%)	2,519

## Membership Reports

Stats on how your members and loyalty members are engaging with your ecosystem.

## Membership Activity

## Loyalty Balance

TOTAL ACTIVITY:

# 725

SCANS

Person	Scans	Membership	Membership ID	Scan Status	Card Status	Expires
<a href="#">Greg Andrews</a>	11	<a href="#">Owner/Founder</a>	<a href="#">1066</a>	validated	active	12/31/9999
<a href="#">Jacky Leroy</a>	10	<a href="#">Owner/Founder</a>	<a href="#">1676</a>	validated	active	12/31/9999
<a href="#">Steven Stevenson</a>	7	<a href="#">Resident</a>	<a href="#">3958</a>	validated	active	11/4/2019
<a href="#">Alexis Maxine</a>	5	<a href="#">Resident</a>	<a href="#">4796</a>	validated	active	11/3/2019
<a href="#">Jessica Sundries</a>	5	<a href="#">Resident with Spouse/Partner</a>	<a href="#">2238</a>	validated	active	11/27/2019
<a href="#">Frank Williamson</a>	5	<a href="#">Resident with Spouse/Partner</a>	<a href="#">2571</a>	validated	active	11/4/2019

## MEMBER POINT STATUS

[view all](#)

MEMBER	CURRENT POINTS	TOTAL EARNED	TOTAL DENIED	TOTAL MISSING	TOTAL PENDING
Allison Wonders	<b>38</b> Updated: Oct 26, 2019	<b>1,578</b>	<b>0</b>	<b>0</b>	<b>0</b>
Stan Johnson	<b>4</b> Updated: Oct 26, 2019	<b>6,024</b>	<b>0</b>	<b>0</b>	<b>0</b>
Peter Piper	<b>51</b> Updated: Oct 26, 2019	<b>191</b>	<b>0</b>	<b>0</b>	<b>0</b>
Mike Michaelson	<b>6</b> Updated: Oct 26, 2019	<b>4,066</b>	<b>0</b>	<b>0</b>	<b>0</b>
Allison Greenwald	<b>69</b> Updated: Oct 26, 2019	<b>209</b>	<b>0</b>	<b>0</b>	<b>0</b>

## Additional Reports

Simple and quick reports we thought you could leverage, but not categorized yet.

### Location Member Dashboard

[Download CSV](#) | [View Grid](#)

See a breakdown and comparison of sales by member at each location.

### Member Sales + Sign Up by Employee

[Download CSV](#) | [View Grid](#)

See how many members and total sales your employees generated.

### Touchpoint Activity and Revenue

[Download CSV](#) | [View Grid](#)

An overview of your most recent touchpoints and the revenue it generated.

### Transactions by Revenue Stream

[Download CSV](#) | [View Grid](#)

An overview of your most recent transactions and the revenue it generated.

## MEMBER SALES + SIGN UP BY EMPLOYEE

[export report](#)

From Date:

10/01/2019

To Date:

10/31/2019

Sort By:

Select a Location

APPLY

First Name	Last Name	Employee Id	Total Revenue	Total Orders	Total New Members	Total Existing Members	Identified
Mauricio	Paolo	695-156934	\$59,702.15	112	2	7	11
TO-GO	TO-GO	3636-157557	\$53,242.73	660	0	4	6
Mycola	Rustosky	640-156934	\$52,984.45	377	2	34	31
Alfred	Leonid	1622-156936	\$44,810.08	396	9	66	90
Mia	Wyndil	473-156934	\$41,363.15	251	2	11	15
Anthony	Jennifer	684-156934	\$34,686.70	114	1	8	10
Ashley	Fred	490-156934	\$33,874.87	254	1	35	26

# Build Your Own Reports & Charts

You can export data from PeopleVine directly into Excel to build custom reports and charts with ease. As well as the data can refresh live as you need it.

## Step 1

Go to export data in PeopleVine and select the table and fields you want.

## Step 2

Save the report and then load the report to get the data share URL.

## Step 3

Go to Excel and choose to import data from that URL. You can refresh at anytime.

### Build a Custom Report

Select Data to Export:

Members

Order	Field & Table Name	Match
<input checked="" type="checkbox"/> 1	isMember customer	Match

Enter Name to Save Report:

Member Data

Add a name to this report to save it for future use.

You can download a live version of this file at: <https://peoplevine//report/123/456/asdfasd2-1842-435a-8adsf-1aggtehag34t32ty>

AutoSave  Off

File Home Insert Page Layout Formulas **Data** Review View Help

From Table/Range Recent Sources Existing Connections Refresh All Queries & Connections Properties Edit Links Stocks

Get & Transform Data

From Web

Basic  Advanced

URL