



Process

Documentation

Department:

Customer Service

Last Updated:

3/13/2026 10:27 AM

NAME OF PROCESS

Generating Sales Analysis Reports

Use Case / Objectives

In this article, we will show you how to retrieve revenue data using various option, including:

- [Breakout of Customer Revenue](#) in the Summary Header Display Report
- [Location analysis report for a specified period](#) in the Daily Sales Breakdown Report
- Displaying a summary of [revenue associated with Sales Reps](#) in the Summary Header Display Report

Configuration, Training, and Reporting

This document assumes you know how to perform basic Search functionality to find information in the system (i.e., F4 search). The steps for this are not included within this document.

Field definitions for applicable tasks are available in the Reference Glossary. To view these definitions either click on the screen name in the task or scroll to the end of the documentation to view the Glossary.

Menu options to access:

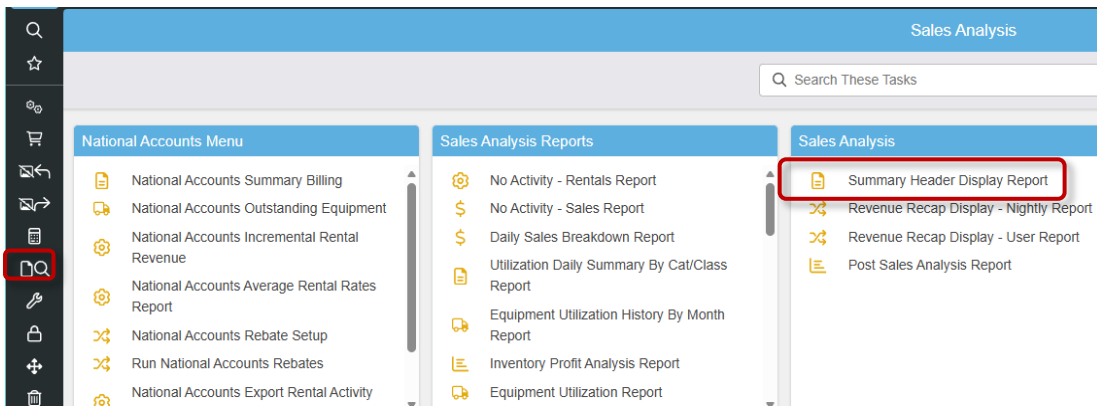
Sales Analysis -> Sales Analysis ->Summary Header Display Report

Sales Analysis -> Sales Analysis Reports -> Daily Sales Breakdown Report

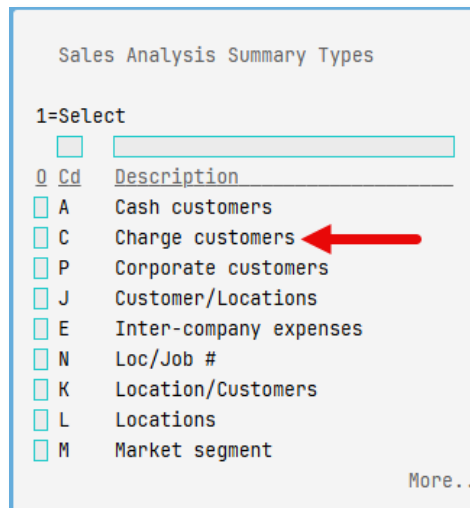
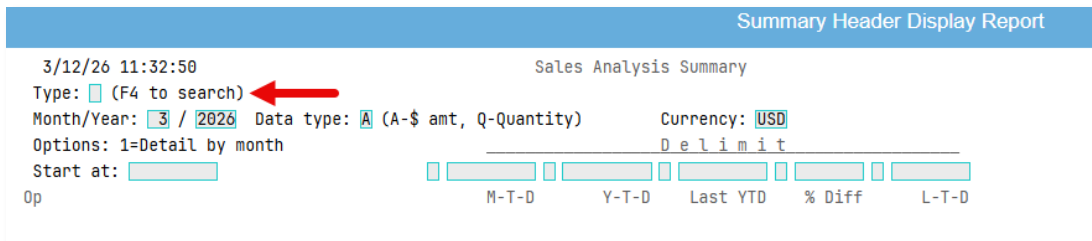
Summary Header Display Report - Customer Revenue

Process Steps

1. Log into the [RolePlay environment](#) using your credentials.
2. From the **Sales Analysis** menu, click on the **Summary Header Display Report** option in the **Sales Analysis** section.



3. On the **Summary Header Display Report** screen, type in the **Type** field or press F4 to open the **Sales Analysis Summary Types** pop-up window to select. **NOTE:** In this example, **Type A - Charge Customers** is used.



- This report defaults to the current *Month/Year* but can be changed as needed. Also, the default *Data Type* is **A - Dollar Amount** but can also be changed to **Q** to show quantities as shown in later steps.

Summary Header Display Report

3/12/26 11:44:23 Sales Analysis Summary

Type: (F4 to search)

Month/Year: / **Data type: A (A-\$ amt, Q-Quantity)** Currency:

Options: 1=Detail by month Delimit

Start at:

Op Cust # Name M-T-D Y-T-D Last YTD % Diff L-T-D

- Press Enter to populate the report.

Summary Header Display Report

3/12/26 11:45:13 Analysis by Customer

Type: (F4 to search)

Month/Year: / Data type: A (A-\$ amt, Q-Quantity) Currency:

Options: 1=Detail by month Delimit

Start at:

Op	Cust #	Name	M-T-D	Y-T-D	Last YTD	% Diff	L-T-D
<input type="checkbox"/>	41	PROFIT					
<input type="checkbox"/>	1000	1 SOURCE POWER & EQUIPMENT					41833
<input type="checkbox"/>	1004	ABC RECYCLING, INC					
<input type="checkbox"/>	1008	ADVANCED QUALITY CONSTRUCTI					44504
<input type="checkbox"/>	1010	AERIAL ACCESS EQUIPMENT					66240
<input type="checkbox"/>	1011	AFFOLTER CONTRACTING CO, IN					224168
<input type="checkbox"/>	1012	A.H. BECK FOUNDATION CO. IN			46520	100.00-	338471
<input type="checkbox"/>	1013	AKM, LLC A DIVISION OF VOLK					464450
<input type="checkbox"/>	1016	ALCOA CARBON PRODUCTS					678748
<input type="checkbox"/>	1018	ALFRED PALMA, LLC					462488
<input type="checkbox"/>	1019	ALL SCRAP METALS					8725
<input type="checkbox"/>	1023	AMERICAN CONSTRUCTION DEMOL					11973
<input type="checkbox"/>	1026	ANDERS CONSTRUCTION					2536
<input type="checkbox"/>	1030	APC CONSTRUCTION LLC			92951	100.00-	1300247
<input type="checkbox"/>	1031	APECK CONSTRUCTION LLC					388685
<input type="checkbox"/>	1032	APOLLO ENVIROMENTAL STRATEG					363836

Select option or change selection or delimiting criteria and press Enter.

- This report lists all Charge Customer Dollar Amount Revenue for *MTD* (month-to-date), *YTD* (year-to-date), *Last YTD* (year-to-date LAST YEAR), *% Diff* (percent difference this year and last year), and *LTD* (Lifetime-to-date).
- To view the report by quantities, type Q - Quantity in the *Data Type* field and press Enter.

Summary Header Display Report

3/12/26 11:56:52 Analysis by Customer

Type: (F4 to search)

Month/Year: / **Data type: Q (A-\$ amt, Q-Quantity)** Currency:

Options: 1=Detail by month Delimit

Start at:

Op	Cust #	Name	M-T-D	Y-T-D	Last YTD	% Diff	L-T-D
<input type="checkbox"/>	41	PROFIT					1
<input type="checkbox"/>	1000	1 SOURCE POWER & EQUIPMENT					21
<input type="checkbox"/>	1004	ABC RECYCLING, INC					1
<input type="checkbox"/>	1008	ADVANCED QUALITY CONSTRUCTI					16
<input type="checkbox"/>	1010	AERIAL ACCESS EQUIPMENT					20
<input type="checkbox"/>	1011	AFFOLTER CONTRACTING CO, IN					61
<input type="checkbox"/>	1012	A.H. BECK FOUNDATION CO. IN			10	100.00-	87
<input type="checkbox"/>	1013	AKM, LLC A DIVISION OF VOLK					121
<input type="checkbox"/>	1016	ALCOA CARBON PRODUCTS					49
<input type="checkbox"/>	1018	ALFRED PALMA, LLC					109
<input type="checkbox"/>	1019	ALL SCRAP METALS					4
<input type="checkbox"/>	1023	AMERICAN CONSTRUCTION DEMOL					4
<input type="checkbox"/>	1026	ANDERS CONSTRUCTION					2
<input type="checkbox"/>	1030	APC CONSTRUCTION LLC			9	100.00-	318
<input type="checkbox"/>	1031	APECK CONSTRUCTION LLC					104
<input type="checkbox"/>	1032	APOLLO ENVIROMENTAL STRATEG					40

Select option or change selection or delimiting criteria and press Enter.

- To see revenue data for a specific customer, type 1 in the *Op* field next the desired customer and press Enter.

Summary Header Display Report

3/12/26 12:00:42 Sales Analysis By Account Customers Sys:

Cmp: Loc:

Type: C Customer#: 1068 Mode ALL LOCS

Month/Year: 3 / 2026 BENTON'S EQUIPMENT & CONSTRUCT **TOTAL**

Currency: USD

Month	2025	% Change	2024	% Change	2023	Monthly Average
MAR	41,300	18.7-	50,827	6.3-	54,224	48,784
FEB	75,601	87.7	40,284	3.4	38,949	51,611
JAN	48,341	296.5	12,192	65.2-	35,052	31,862
DEC	91,041	234.8	27,192	18.0-	33,154	50,462
NOV	73,138	236.5	21,738	62.9-	58,610	51,162
OCT	139,565	158.4	54,008	18.6-	66,353	86,642
SEP	135,369	122.4	60,863	8.5	56,109	84,114
AUG	219,570	249.2	62,871	23.1	51,081	111,174
JUL	108,575	102.2	53,697	55.2	34,603	65,625
JUN	114,595	74.4	65,717	140.1	27,368	69,227
MAY	47,845	8.5	44,078	22.0	36,134	42,686
APR	77,635	1.7	76,315	547.5	11,787	55,246
***	1,172,575	105.8	569,782	13.2	503,424	748,594

- Press or click F14 to show only **Rental Revenue** for this customer.

3/12/26 12:04:32 Sales Analysis By Account Customers Sys:

Cmp: Loc:

Type: C Customer#: 1068 Mode ALL LOCS

Month/Year: 3 / 2026 BENTON'S EQUIPMENT & CONSTRUCT **RENTAL**

Currency: USD

Month	2025	% Change	2024	% Change	2023	Monthly Average
MAR	32,696	10.9-	36,702	21.1-	46,517	38,638
FEB	66,087	94.9	33,910	3.1	32,898	44,298
JAN	42,032	295.4	10,631	65.4-	30,755	27,806
DEC	71,623	259.2	19,942	32.0-	29,309	40,291
NOV	61,530	251.2	17,518	65.3-	50,477	43,175
OCT	114,535	156.3	44,686	18.4-	54,769	71,330
SEP	109,916	110.6	52,183	4.9	49,727	70,609
AUG	182,020	239.7	53,588	23.9	43,251	92,953
JUL	86,706	83.1	47,356	52.2	31,115	55,059
JUN	96,210	69.2	56,852	148.8	22,855	58,639
MAY	36,599	3.8-	38,046	31.2	28,999	34,548
APR	58,016	12.5-	66,294	546.7	10,251	44,854
***	957,970	100.5	477,708	10.9	430,923	622,200

10. You can also press or click F15 to show only **Sales Revenue** for this customer:

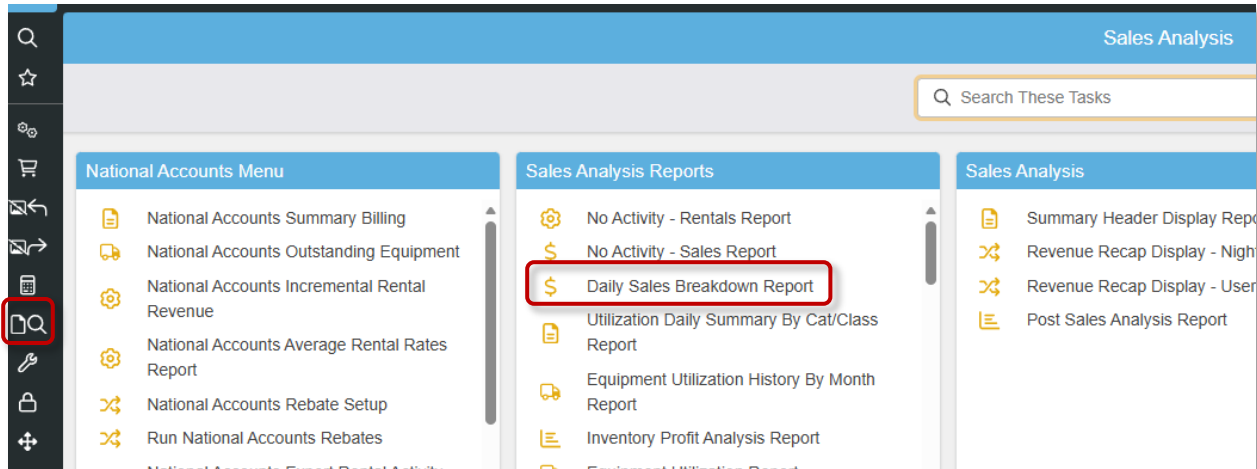
3/12/26 12:06:41		Sales Analysis By Account Customers				Sys: []
Type: C	Customer#: 1068					Cmp: [] Loc: []
Month/Year: [] / 2026	BENTON'S EQUIPMENT & CONSTRUCT				Mode: ALL LOCS	Sales
Currency: USD	2026-		2025-		2024-	Monthly
Month	2025	% Change	2024	% Change	2023	Average
MAR						
FEB						
JAN						
DEC						
NOV						
OCT	68	9999.9				23
SEP						
AUG						
JUL						
JUN						
MAY						
APR						
***	68	9999.9				23

NOTE: If you would like to create a **PUSH** file for any of the above screens, while on that screen, you can press or click F19 to send the report to your **Manage My Files** area.

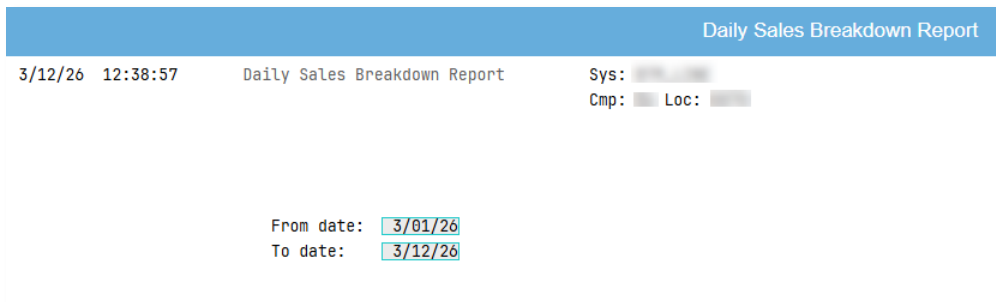
Daily Sales Revenue

Daily Sales Breakdown

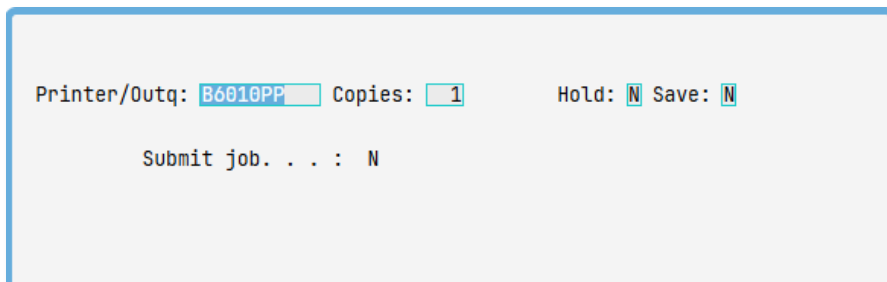
1. From the **Sales Analysis** menu, click on the **Daily Sales Breakdown Report** option in the **Sales Analysis Reports** section



2. On the **Daily Sales Breakdown Report** screen, type in the *From* and *To* date range fields. **NOTE:** The default is the current month.
3. Press Enter twice to populate the report.



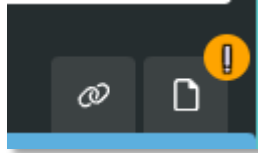
4. The **Submit Job** screen displays.
5. Verify your *Printer/Outq* setting and press Enter to submit the job.



NOTE: In RolePlay, you can send the report to your **Manage My Files** folder (**PUSH**) by typing in your RentalMan **UserID** in the *Printer/Outq* field to create a

printable/viewable PDF file of the report. Alternatively, you can send the report to a printer by entering the RentalMan printer ID instead.

- For this article, we sent the report to a PUSH file.
- The report is ready to view when the **ORANGE** indicator icon displays by your **Manage My Files** icon.



- Click on the **Manage My Files** icon to open your existing PUSH files.
- To open the report, either double click on it or click on the **Open** icon.



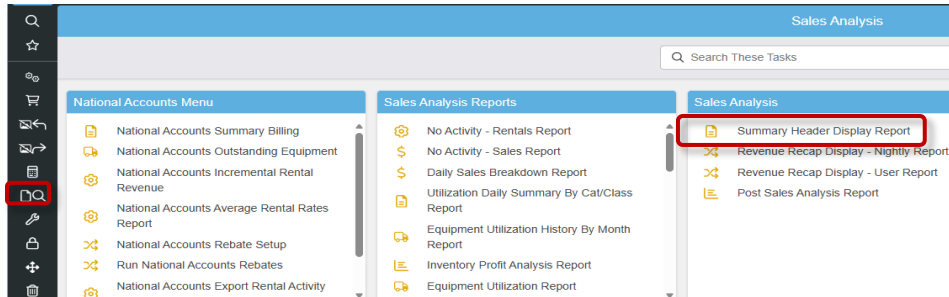
- This report lists the **Daily Revenue** by each location for each day of the reporting period. Both Rentals and Sales are shown as well as the number of transactions for cash and charge customers (See sample report below).

RUN DATE		TIME	DAILY SALES BREAKDOWN FOR 3/01/26- 3/12/26															PAGE				
DATE	DAY	CASH	INV	AVERAGE	CHARGE	INV	AVERAGE	TOTAL	TOT	AVERAGE	CASH	INV	AVERAGE	CHARGE	INV	AVERAGE	TOTAL	TOT	AVERAGE	TOT	AVERAGE	TOTAL
3/01/26	SUNDAY	.00	0	.00	15810.00	1	5810.00	15810.00	1	5810.00	.00	0	.00	1343.85	0	2921.67	1343.85	0	2921.67	1	7153.85	17153.85
Weekly Subtotal								15810.00	1										1343.85	0	1	17153.85
3/02/26	MONDAY	.00	0	.00	36764.65	3	2254.88	36764.65	3	2254.88	.00	0	.00	8309.52	1	8309.52	8309.52	1	8309.52	4	1268.54	45074.17
3/03/26	TUESDAY	.00	0	.00	6638.00	2	3319.00	6638.00	2	3319.00	.00	0	.00	533.88	0	8309.52	533.88	0	8309.52	2	3585.94	7171.88
3/04/26	WEDNESDAY	.00	0	.00	35083.50	4	8770.87	35083.50	4	8770.87	.00	0	.00	1338.03	0	8309.52	1338.03	0	8309.52	4	9105.38	36421.53
3/05/26	THURSDAY	.00	0	.00	28642.50	5	5728.50	28642.50	5	5728.50	.00	0	.00	2256.24	0	8309.52	2256.24	0	8309.52	5	6179.74	30898.74
3/06/26	FRIDAY	.00	0	.00	7485.00	2	3742.50	7485.00	2	3742.50	.00	0	.00	.00	0	8309.52	.00	0	8309.52	2	3742.50	7485.00
3/07/26	SATURDAY	.00	0	.00	14264.58	3	4754.86	14264.58	3	4754.86	.00	0	.00	779.84	0	8309.52	779.84	0	8309.52	3	5014.80	15044.42
Weekly Subtotal								128878.23	19										13217.51	1	20	142095.74
3/08/26	SUNDAY	.00	0	.00	10922.60	2	5461.30	10922.60	2	5461.30	.00	0	.00	960.18	0	8309.52	960.18	0	8309.52	2	5941.39	11882.78
3/09/26	MONDAY	.00	0	.00	28435.24	5	5687.04	28435.24	5	5687.04	.00	0	.00	2158.64	0	8309.52	2158.64	0	8309.52	5	6118.77	30593.88
3/10/26	TUESDAY	.00	0	.00	24410.00	6	4068.33	24410.00	6	4068.33	.00	0	.00	2118.69	0	8309.52	2118.69	0	8309.52	6	4421.44	26528.69
3/11/26	WEDNESDAY	.00	0	.00	36816.34	5	7363.26	36816.34	5	7363.26	.00	0	.00	3429.26	0	8309.52	3429.26	0	8309.52	5	8049.12	40245.60
Weekly Subtotal								100584.18	18										8666.77	0	18	109250.95
TOTALS -		.00			245272.41	38		245272.41	38		.00			23228.13	1		23228.13	1		39		268500.54
RENTAL TOTAL		245272.41	91.3%				22297.49			6454.54	AVC	3										
SALES TOTAL		23228.13	8.7%	11 DAY AVG.			2111.64	AVC INVOICE		3228.13	PER DAY	0										
FINAL TOTAL		268500.54	100%				24409.14			6884.63		3										
TOTAL A/R INVOICES		39	.0%	0																		
TOTAL CASH INVOICES		0	.0%	AVC	0	TOTAL INVOICES	44															
TOTAL N/C INVOICES		0005																				

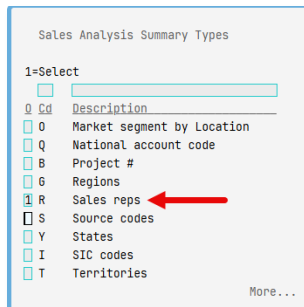
Revenue Details by Sales Rep

Process Steps

1. From the **Sales Analysis** menu, click on the **Summary Header Display Report** option in the **Sales Analysis** section.



2. On the **Sales Analysis Summary Report** screen, type R - sales reps in the **Type** field or press F4 and type 1 next to **Sales Reps**.



3. Press Enter to populate the report. **NOTE:** The report below is a sample of the report.

Summary Header Display Report

3/12/26 13:09:14 Analysis by Sales Rep

Type: R (F4 to search) ←

Month/Year: 3 / 2026 Data type: A (A-\$ amt, Q-Quantity) Currency: USD

Options: 1=Detail by month Delimit

Start at:

Op	Rep	Name	M-T-D	Y-T-D	Last YTD	% Diff	L-T-D
	1	KURT DEGUEYTER	6923	6955	302013	97.70-	13880804
	5	BREVARD WALKER	111660	1329746	6294904	78.88-	100256460
	15	SCOTT PHILLIPS	45091	415904	1488878	72.07-	13137698
	25	RYAN MCCANN	616995	4141270	2994223	38.31	75910378
	27	ROY COMEAUX	32998	262811	67231	290.91	25852419
	39	GARY EBERHARDT	42844	1028272	1056353	2.66-	24200027
	66	JOHNNY BREAUX		318200	24762	1185.03	5617570
	69	KENDALL CORMIER					157691
	77	ADRIAN MARTINEZ	301983	1696181	2118531	19.94-	22681995
	78	SAMARA STICKLER	90396	1116763	1776173	37.13-	18355921
	8	SCOTT HAMRICK					452493
	80	SCOTT HAMRICK	3268	141522	3346656	95.77-	28372756
	91	KALEB ONEAL	162941	1327349	1395382	4.88-	11813507
	93	BRAD HERRINGTON	353629	1705049	1522738	11.97	17118631
	101	HOUSE ACCOUNT - ST. ROSE	722	39583	38326	3.28	8991882
	102	HOUSE ACCOUNT - BATON ROUGE	2625	4031412	8617462	53.22-	192969880

Select option or change selection or delimiting criteria and press Enter.

- To see a detailed monthly analysis for a Sales Rep, type 1 in the *Op* field next to the desired Sales Rep and press Enter.

Summary Header Display Report

3/12/26 13:10:45 Sales Analysis By Sales Representative Sys:
 Cmp: Loc:
 Type: R Sls Rep #: 5 Mode ALL LOCS
 Month/Year: 3 / 2026 BREVARD WALKER **TOTAL**
 Currency: USD

Month	2026-		2025-		2024-	Monthly
	2025	% Change	2024	% Change	2023	Average
MAR	111,660	95.7-	2,603,970	50.8	1,726,549	1,480,726
FEB	525,220	73.5-	1,982,280	65.1	1,200,803	1,236,101
JAN	692,866	59.4-	1,708,654	58.4	1,078,669	1,160,063
DEC	779,309	49.1-	1,529,899	2.0	1,499,369	1,269,526
NOV	908,481	36.0-	1,420,566	16.0-	1,690,576	1,339,874
OCT	1,247,481	31.4-	1,817,778	16.6	1,558,885	1,541,381
SEP	1,386,876	24.1-	1,827,623	15.1	1,588,214	1,600,904
AUG	1,603,713	24.6-	2,127,306	40.3	1,515,917	1,748,979
JUL	2,231,139	39.3	1,601,573	50.4	1,064,589	1,632,434
JUN	2,635,570	42.6	1,848,553	79.3	1,030,959	1,838,361
MAY	2,439,679	31.1	1,860,611	65.7	1,122,974	1,807,755
APR	2,276,138	29.1	1,762,788	68.8	1,044,208	1,694,378
***	16,838,132	23.8-	22,091,601	37.0	16,121,712	18,350,482

- Press or click F14 to show just Rental revenue for this Sales Rep.

Summary Header Display Report

3/12/26 13:14:08 Sales Analysis By Sales Representative Sys:
 Cmp: Loc:
 Type: R Sls Rep #: 5 Mode ALL LOCS
 Month/Year: 3 / 2026 BREVARD WALKER **RENTAL**
 Currency: USD

Month	2026-		2025-		2024-	Monthly
	2025	% Change	2024	% Change	2023	Average
MAR	105,558	95.1-	2,160,659	49.0	1,449,834	1,238,684
FEB	475,122	71.3-	1,656,569	64.4	1,007,825	1,046,505
JAN	608,596	56.7-	1,404,248	45.2	967,068	993,304
DEC	711,285	46.0-	1,318,174	1.3	1,301,300	1,110,253
NOV	777,837	36.3-	1,220,949	13.4-	1,410,426	1,136,404
OCT	1,120,991	26.3-	1,520,287	21.8	1,247,786	1,296,355
SEP	1,171,919	25.7-	1,577,692	25.8	1,253,721	1,334,444
AUG	1,467,743	18.4-	1,797,683	50.1	1,197,890	1,487,772
JUL	2,018,297	44.5	1,396,867	56.6	892,056	1,435,740
JUN	2,245,961	46.8	1,529,558	81.8	841,345	1,538,955
MAY	2,195,616	39.5	1,573,637	70.5	922,797	1,564,017
APR	2,001,690	34.7	1,485,621	71.9	864,093	1,450,468
***	14,900,615	20.1-	18,641,944	39.6	13,356,141	15,632,900

6. Press or click F15 to show **Sales revenue** for this Sales Rep.

Summary Header Display Report						
3/12/26 13:15:09		Sales Analysis By Sales Representative			Sys: <input type="text"/>	
Type: R Sls Rep #: 5					Cmp: <input type="text"/>	Loc: <input type="text"/>
Month/Year: 3 / 2026		BREVARD WALKER			Mode ALL LOCS	Sales
Currency: USD						
Month	2026- 2025	% Change	2025- 2024	% Change	2024- 2023	Monthly Average
MAR	2	97.9-	95	280.0	25	41
FEB		100.0-	198	692.0	25	74
JAN						
DEC		100.0-	25		25	17
NOV	1,415	889.5	143	96.6-	4,238	1,932
OCT	69	81.3-	369	88.2-	3,140	1,193
SEP	20	90.1-	203	92.5-	2,709	977
AUG	50	80.6-	258	86.7-	1,939	749
JUL	10	97.9-	475	9999.9		162
JUN	551	267.3	150	9999.9		234
MAY	389	1456.0	25	9999.9		138
APR	185	88.2-	1,571	9999.9		585
***	2,691	23.4-	3,512	71.0-	12,101	6,101

NOTE: If you would like to create a **PUSH** file for any of the above screens, while on that screen, you can press or click F19 to send the report to your **Manage My Files** area.