

MINI-GUIDE: Business Summary Report

The Business Summary report gives you a snapshot of your business statistics. This mini-guide explains what each section means and how it has been calculated.

Business Summary										
Thursday, 1 Sep 2011 to Friday, 30 Sep 2011										
Jo's										
Note: Sales figures are all committed Invoices less all committed Credit Notes for the period, but excludes Voucher sales.										
GST inclusive CREDIT SERVICES Who did work SALES % CALCULATION : Number of Clients as a %										
Overall Totals		# Clients Buying			Appt Status		Vouchers			
Client Sales		# sold	%	Avg per client	Total	Unconfirmed	2	Voucher Sales	0 \$0	
Services	918	100%	568	98	55,840	Booked	138	Vouchers Received	2 \$180	
Retail - Appointment	184	24%	137	12	7,000	Cancelled	109	Client Stats		
Retail - Walk in	41	100%	28	44	1,240	Started	1	Clients Billed (excl walk in retail)	568	
	6				233	Completed	581	Clients Billed - walk in retail	28	
Unclassified					-1,030	No-Show	16	Clients - Appointment	709	
K\$ redeemed								Rebookings (within 24hr)	560 79%	
Total Sales					\$10€ \$63,280	Gender Stats	Female 595	84%	Client retention	566 80%
Category Sales	# sold	%	# Clients Buying	Avg price	Total	Male 114	16%	Visit rate	8.1x pa or every 6wks	
Cut & Style	511	89%	504	58	29,460	Unknown 0	0%	New Clients	43 6%	
Foil Highlights	98	15%	87	77	7,520	Uninvoiced		New Client Rebooking	19 44%	
Permanent Colour	70	12%	70	73	5,100	Appointments 147		New Client Retention	20 47%	
Treatments	66	12%	66	26	1,690			Staff requests	593 84%	
Chemical Services	335	46%	264	73	24,500					

Client Sales

Overall Totals						
Client Sales		# sold	%	# Clients Buying	Avg per client	Total
Services	918	100%	568	98	55,840	
Retail - Appointment	184	24%	137	12	7,000	
Retail - Walk in	41	100%	28	44	1,240	
	6				233	
Unclassified					-1,030	
K\$ redeemed						
Total Sales					\$10€ \$63,280	

Services: records sales of everything in your Kitomba that has been classed as a 'Service'.

Retail – Appointment: shows sales of retail where the customer has also purchased a service (i.e. they have come into the salon/spa for an appointment and have purchased retail at the time the service was checked out).

Retail – Walk in: this shows sales of retail where the customer has not purchased a service, in this case the customer has only come to the salon/spa for a retail purchase and has not had a service.

Sold: this is the total number of items sold. If one client buys two retail products or has two services (e.g. cut and colour or facial and massage), this is recorded as two items.

%: you can control the way this is calculated from within Kitomba preferences. The options are:

- **Percent of Clients** – this takes the number of clients billed and divides it by the number of items sold. As some clients buy two or more items this percentage can exceed 100% (i.e. if you bill 100 clients but they purchase 150 services then the % will be 150% - an average of 1.5 services per client).
- **Purchase Rate** – this takes the number of clients who purchase a particular type as a % of the total number of clients you have billed (i.e. if you bill 100 clients and 30 of them buy one or more retail items with their appointment then your retail purchase rate will be 30%).

Note: the two above % are calculated differently for the walk-in retail line. They use the number of walk-in clients billed (i.e. if you sell 100 retail items to 50 walk-in retail customers, the % of clients will be 200%).

Percent of sales: this takes the amount of money you have made from the particular area as a percent of your overall takings (i.e. if you make \$900 from services and \$1000 overall then 90% of your revenue is from services).

Clients buying: this shows the number of clients who bought an item of this type. The numbers for 'Service' and 'Walk-in Retail' are the same as the numbers on the right hand side under 'Clients Billed' and 'Clients Billed – walk in retail' found under Client Stats (i.e. if one person comes in for two separate visits and two different bills are created, they are counted as two bills).

AvgPer Client: this is the average amount each client billed spends in the category. It is calculated by spend in the category divided by the total clients billed (excl. walk-in clients). Because these are averages, it is not expected the three figures will add up to the figure in bold under total sales.

Note: the walk-in client average is the average spend for walk-in clients only. It will almost always be higher than appointment retail because, by definition, every walk-in customer buys retail, whereas only some service clients buy retail).

Category Sales

You can show up to six categories in the Category Sales area.

Category Sales	# sold	%	# Clients Buying	Avg price	Total
Cut & Style	511	89%	504	58	29,461
Foil Highlights	98	15%	87	77	7,522
Permanent Colour	70	12%	70	73	5,104
Treatments	66	12%	66	26	1,696
Chemical Services	335	46%	264	73	24,504

To add a category to your list, tick the box under the category in the Cards tab.


Category


Name: Description:


Parent Category:


Show on Business Summary Trigger Magic Marketing when sold

Category Actions

 Deactivate/Reactivate all items in this Category

 Move all items from this Category

 Change all prices for this Category

 Set Star Type of all services in this Category

The calculations here are similar to Client Sales. The one difference is we have Avg Price here rather than Avg per Client.

Avg Price: this is the average amount spent on each item from these categories (i.e. if you sell 100 chemical services for \$10,000, the average price of that chemical service would be \$100). If you prefer to know what the average spend per customer is, you can divide the total by the number of billed clients on the right of the main report.

Note: if you need more detail on more categories you can find this information in the Sales Analysis or Sales breakdown by staff and category reports.

Vouchers – Sales and Received

Vouchers	#	
Voucher Sales	0	\$0
Vouchers Received	2	\$180

By default Kitomba expects accrual accounting, thus the sale of a voucher is not included in your total sales figures. The sale is effectively added in when the voucher is redeemed. This prevents double counting of voucher sales and ensures staff will get rewarded for services if paid for by voucher. If you prefer cash-based accounting and need to count the voucher when it's sold, you can add the voucher sales figure to your total sales then minus the vouchers received figure. More detailed voucher information is available on the voucher reports – Voucher Statistics and Voucher Trace Report.

Client Stats

This area shows information about the clients' themselves. Most of the figures are based on your appointment book.

Client Stats			
Clients Billed (excl walk in retail)		568	
Clients Billed - walk in retail		28	
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Clients - Appointment	709		
Rebookings (within 24hr)	560	79%	
Client retention	566	80%	
Visit rate	8.1x pa or every 6wks		
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New Clients	43	6%	
New Client Rebooking	19	44%	
New Client Retention	20	47%	
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Staff requests	593	84%	

Clients Billed: this is the total number of client bills. This number is used to calculate many of the averages and percentages in the sales sections above. This figure excludes walk-in clients. If one person comes in for two separate visits and two different bills are created, they are counted as two client bills.

Clients Billed – walk-in retail: a walk-in bill is one where there are only Retail items and no service items. This indicates the client didn't come into the salon for a service (appointment) but just walked in off the street and purchased a retail product. A

walk-in bill could be for a casual customer, or for an existing customer who usually gets a service, but in this case has just popped in to buy some retail.

Clients Appointment: this is the number of appointments within the period. If one client comes in for two or more services in one day this is a single appointment, but if the same client comes in for two different appointments on different days, these are two appointments. This number will often be higher than the business summary or you can run the Appointments – Un-invoiced report for details of these. Due to multi-service appointments and the ability for an appointment to have more than one status, it is possible that the total of all the different statuses in the center of the business summary adds to a higher number than client appointments. This is normal and does not indicate any calculation problems.

Rebooking (within 24hr): this is the number of clients who have rebooked a future appointment. If the future appointment was made at the time of the original appointment then it is counted as a rebooking otherwise it is retention (see below). A 24hr cut-off is used to cover instances when the client needs to pop home, check their diary and rebook their future appointment.

Client retention: this is a measure of the clients who are actually coming back to the salon/spa. It doesn't matter if they rebook or if they received marketing material and decided to make a new appointment or if it just took them a few days to decide to come back. This number will be higher than rebooking but has a more direct impact on your revenue.

Average revisit period: for those clients who are returning to the salon/spa this shows on average how long it is before their next visit.

New Clients: these are your new clients within the period. This is driven off the new client flag on the appointment screen.

New Client Rebooking: this is the number of new clients who have rebooked.

New Client Retention: this is the number of new clients retained.