

Sales by Customer Report for Past 5 Years

Question:

“Can I create a report that shows me Sales by Customer by Year for the Past Five Years in QuickBooks?”

Answer

Yes – within QuickBooks you can modify a Sales report to show Sales by Customer Name and compare the prior years, allowing you to compare your customer activity over any period of time. Sales figures can be compared as far back as you have transactions in QuickBooks.

Step 1

Via the **Reports** drop down menu select **Sales** and click on **Sales by Customer Summary**. Enter the **date range** you want to compare sales for (e.g. 01/07/2007 to 30/06/2012) and click on the **Columns** drop down menu next to the date and select **Year**. Leave the **Sort By** option as **Default**. Click **Refresh** to view the report on screen.

The screenshot shows the 'Sales by Customer Summary' report in QuickBooks. The report title is 'Cougar Enterprises Sales by Customer Summary July 2007 through June 2012'. The report is displayed for the period 'From 01/07/2007 To 30/06/2012' with columns set to 'Year'. The table below shows sales data for various customers over five years (Jul '07 - Jun 08 to Jul '11 - Jun 12) and a total column.

| | Jul '07 - Jun 08 | Jul '08 - Jun 09 | Jul '09 - Jun 10 | Jul '10 - Jun 11 | Jul '11 - Jun 12 | TOTAL |
|-------------------------|------------------|------------------|------------------|------------------|------------------|------------|
| IAABed (Cust) | 0.00 | 0.00 | 0.00 | 0.00 | 1,893.00 | 1,893.00 |
| AMSTRAD Builders | 111,654.50 | 82,420.00 | 102,655.00 | 129,050.00 | 129,160.00 | 554,939.50 |
| Bondi Development Group | 66,017.50 | 89,490.00 | 89,490.00 | 67,117.50 | 111,862.50 | 423,977.50 |
| Brunswick Group | 47,307.50 | 167,677.50 | 94,615.00 | 141,922.50 | 236,537.50 | 688,060.00 |
| Building Solutions | 45,910.00 | 103,320.00 | 103,320.00 | 77,490.00 | 129,150.00 | 459,190.00 |
| Capital Industries | 108,325.00 | 166,500.00 | 122,305.00 | 124,875.00 | 208,125.00 | 730,130.00 |
| Carlton Cleaning | 45,910.00 | 80,320.00 | 60,240.00 | 60,240.00 | 100,400.00 | 347,110.00 |
| Carlton Cranes | 19,527.50 | 0.00 | 0.00 | 0.00 | 0.00 | 19,527.50 |
| Carlton Electrical | 20,605.00 | 0.00 | 0.00 | 0.00 | 0.00 | 20,605.00 |
| Carlton Finance Company | 19,575.50 | 0.00 | 0.00 | 0.00 | 0.00 | 19,575.50 |

Step 2

You may also wish to display additional information such as the individual customers sales totals expressed as a percentage of the total sales for that year. This will show who you did the most business with in that year and if that percentage has been increasing or decreasing over the years. This is done by clicking on the **Modify Report** button and ticking the option for **% of Column** and then select **OK** to refresh the report. Further information on how to do this can be found in **Answer Sheet #323**.

Note: For further details on *Modifying & Filtering Reports* please refer to **Answer Sheet #028 Filtering Reports** and **Answer Sheet #148 Displaying the Modify Report Screen Before Generating a Report**. For further details on *memorising reports* see **Answer Sheet #265 Re-organising the Memorised Reports List**.

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