



Business Overview

A clear view of business performance and emerging opportunities

Generated 18 August 2026
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Comparing 1 July 2026–31 July 2026 with 31 May 2026–30 June 2026 (previous equivalent period).

REVENUE

\$41,000

Total revenue in selected period
↓ 29.3% vs comparison

SALES VOLUME

410

Total quantity in selected period
↓ 29.3% vs comparison

ACTIVE CUSTOMERS

6

Matched customers in selected period
No change vs comparison

ACTIVE PRODUCTS

3

Products with recorded sales
↓ 25.0% vs comparison

REVENUE PER OUTLET

\$6,667

Average across matched active customers
↓ 31.0% vs comparison

Sales trend

Rolling 12-month revenue ending in the selected reporting month



Sales by product

Top products by revenue

PRODUCT	REVENUE	VOLUME
Core Blend	\$20,500	205
Premium Blend	\$14,000	140
Spark Range	\$6,500	65

Business Overview

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Top customers

Highest revenue outlets

CUSTOMER	REVENUE	VOLUME
Alpha Retail	\$12,000	120
Echo Wholesale	\$7,000	70
Foxtrot Foods	\$6,000	60
Hotel Hospitality	\$6,000	60
Delta Pantry	\$5,000	50
Bravo Stores	\$4,000	40

Sales by source

Contribution from each data source

SOURCE	REVENUE	SHARE
Direct	\$41,000	100.0%

Customer Performance

See who is growing, declining, new, or no longer buying

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ACTIVE CUSTOMERS

6

Bought in selected period
 • +0 (+0.0%) vs comparison

NEW CUSTOMERS

1

First recorded purchase in period

DECLINING CUSTOMERS

3

Revenue lower than comparison period

STOPPED BUYING

1

Bought previously, not in selected period

AVERAGE CUSTOMER VALUE

\$6,667

Revenue per active customer
 ↓ -31.0% vs comparison

Customer movement

Current revenue compared with the selected comparison period

OUTLET	CURRENT	PRIOR	CHANGE
Alpha Retail	\$12,000	\$10,000	+20.0%
Echo Wholesale	\$7,000	\$15,000	-53.3%
Foxtrot Foods	\$6,000	\$6,000	+0.0%
Hotel Hospitality	\$6,000	\$10,000	-40.0%
Delta Pantry	\$5,000	\$0	New
Bravo Stores	\$4,000	\$8,000	-50.0%
Charlie Market	\$0	\$9,000	-100.0%

Customer Performance

See who is growing, declining, new, or no longer buying

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New customers

First purchase appears within the selected period

OUTLET	REVENUE	SALES VOLUME
Delta Pantry	\$5,000	50

Customers that stopped buying

Bought in the comparison period but not the current period

OUTLET	PRIOR REVENUE	PRIOR SALES VOLUME
Charlie Market	\$9,000	90

Top customer opportunities

Largest revenue declines requiring attention

OUTLET	REVENUE CHANGE	STATUS
Echo Wholesale	-\$8,000	Declining
Bravo Stores	-\$4,000	Declining
Hotel Hospitality	-\$4,000	Declining

Product Performance

Product growth and decline

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ACTIVE PRODUCTS

3

Products with sales in selected period
↓ -1 (-25.0%) vs comparison

GROWING PRODUCTS

1

Revenue higher than comparison period

DECLINING PRODUCTS

2

Revenue lower than comparison period

PRODUCTS LOSING OUTLETS

0

Fewer buying outlets than comparison period

REVENUE PER PRODUCT

\$13,667

Average across active products
↓ -5.7% vs comparison

Product movement

Current revenue compared with the selected comparison period

PRODUCT	CURRENT	PRIOR	CHANGE
Core Blend	\$20,500	\$24,000	-14.6%
Premium Blend	\$14,000	\$19,000	-26.3%
Spark Range	\$6,500	\$6,000	+8.3%
Legacy Line	\$0	\$9,000	-100.0%

Product Performance

Product growth and decline

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Distribution by product

Number of buying outlets in the selected period

PRODUCT	OUTLETS	CHANGE
Core Blend	5	+0
Premium Blend	4	+1
Spark Range	3	+1

Top growing products

Largest revenue gains versus the comparison period

PRODUCT	REVENUE GAIN	GROWTH
Spark Range	\$500	+8.3%

Products needing attention

Largest revenue or distribution declines

PRODUCT	REVENUE CHANGE	STATUS
Legacy Line	-\$9,000	Revenue & outlets down
Premium Blend	-\$5,000	Revenue declining
Core Blend	-\$3,500	Revenue declining

Territory Performance

Territory results and product utilisation

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REVENUE

\$40,000

Across selected territories
↓ -31.0% vs comparison

SALES VOLUME

400

Mapped volume
↓ -31.0% vs comparison

ACTIVE CUSTOMERS

6

Buying customers
• +0 (+0.0%) vs comparison

PRODUCTS UTILISED

3

Products purchased
↓ -1 (-25.0%) vs comparison

AVERAGE PRODUCTS/CUSTOMER

2.0

Breadth of product utilisation
↑ +9.1% vs comparison

Territory comparison

Revenue, customer activity and product utilisation by territory

TERRITORY	REVENUE	PRIOR	CHANGE	VOLUME	CUSTOMERS	PRODUCTS UTILISED	AVG PRODUCTS/CUSTOMER
Melbourne Central	\$12,000	\$10,000	+\$2,000	120	1	2	2.0
Brisbane Central	\$7,000	\$15,000	-\$8,000	70	1	2	2.0
Brisbane North	\$6,000	\$6,000	+\$0	60	1	2	2.0
Geelong	\$6,000	\$10,000	-\$4,000	60	1	2	2.0
Sydney South	\$5,000	\$0	+\$5,000	50	1	2	2.0
Melbourne East	\$4,000	\$8,000	-\$4,000	40	1	2	2.0

Territory Performance

Territory results and product utilisation

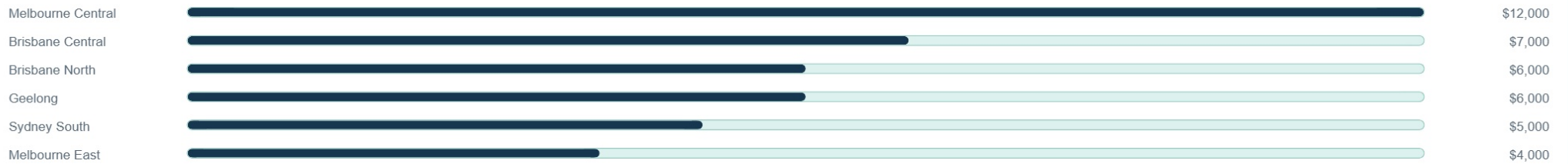
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Revenue by territory

Relative contribution to selected-period revenue



Range opportunity

Largest product-utilisation gaps by territory

TERRITORY	PRODUCT	NOT BUYING	UTILISATION
Melbourne Central	Spark Range	1	0%
Brisbane Central	Spark Range	1	0%
Brisbane North	Premium Blend	1	0%
Geelong	Spark Range	1	0%
Sydney South	Core Blend	1	0%
Melbourne East	Premium Blend	1	0%

Territory Performance

Territory results and product utilisation

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Product utilisation heatmap

Percentage of active customers in each territory that purchased each product

TERRITORY	CORE BLEND	PREMIUM BLEND	SPARK RANGE
Melbourne Central	100%	100%	0%
Brisbane Central	100%	100%	0%
Brisbane North	100%	0%	100%
Geelong	100%	100%	0%
Sydney South	0%	100%	100%
Melbourne East	100%	0%	100%



Customer Detail

Individual account performance and opportunities

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Alpha Retail

Growing

Melbourne Central · Mia Chen · VIC · Direct

REVENUE

\$12,000

Selected period

REVENUE CHANGE

\$2,000

Versus comparison

SALES VOLUME

120

Mapped volume

PRODUCTS PURCHASED

2

Positive-revenue products

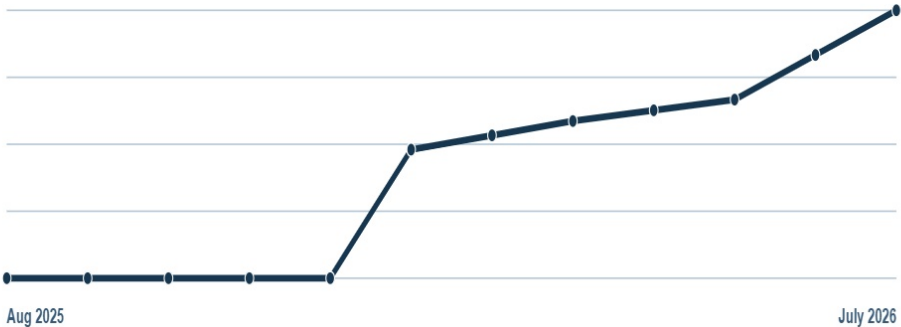
LAST TRANSACTION

17/07/2026

Latest selected-period transaction

Sales trend

Rolling 12-month revenue ending July 2026



Account opportunity

Growing

Revenue is up \$2,000 versus the comparison period.

Product performance

PRODUCT	REVENUE	VOLUME	PRIOR REVENUE	CHANGE	LAST TRANSACTION
Core Blend	\$7,000	70	\$6,000	+\$1,000	03/07/2026
Premium Blend	\$5,000	50	\$4,000	+\$1,000	17/07/2026

Customer Detail

Individual account performance and opportunities

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Recent purchase history

Recent transactions up to the end of the selected reporting period, including credits.

DATE	PRODUCT	REVENUE	VOLUME	SOURCE
17/07/2026	Premium Blend	\$5,000	50	Direct
03/07/2026	Core Blend	\$7,000	70	Direct
18/06/2026	Premium Blend	\$4,000	40	Direct
04/06/2026	Core Blend	\$6,000	60	Direct
05/05/2026	Core Blend	\$8,000	80	Direct
08/04/2026	Core Blend	\$7,520	75.2	Direct
08/03/2026	Core Blend	\$7,040	70.4	Direct
08/02/2026	Core Blend	\$6,400	64	Direct
08/01/2026	Core Blend	\$5,760	57.6	Direct
05/07/2025	Core Blend	\$9,000	90	Direct

Sales Actions

Prioritised commercial follow-up list

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Prioritised sales actions

Comparison and recent-history signals ranked by estimated impact

PRIORITY	TYPE	ACCOUNT / PRODUCT	ISSUE	IMPACT	REP / OWNER
High	Customer	Charlie Market	Stopped buying	-\$9,000	Liam Brooks
High	Product	Legacy Line	No sales	-\$9,000	Liam Brooks
High	Customer	Echo Wholesale	Revenue declined	-\$8,000	Sophie Nguyen
Low	Product	Premium Blend	Revenue declined	-\$5,000	Mia Chen
Medium	Customer	Bravo Stores	Revenue declined	-\$4,000	Mia Chen
Medium	Customer	Hotel Hospitality	Revenue declined	-\$4,000	Mia Chen
Low	Product	Core Blend	Revenue declined	-\$3,500	Mia Chen
High	Customer	Golf General	No recent sales — active in prior 90 days	-\$3,000	Noah Patel
High	Product	Dormant Line	No recent sales — active in prior 90 days	-\$3,000	Noah Patel



Data Quality

Customer mapping and date checks

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Customer mapping issues

Sales identifiers that did not match the Customer Attributes file

1 sales rows across 1 identifiers require mapping review.
Sales remain included in revenue, sales volume, product, brand and source reporting. Unmatched customers are excluded from customer and territory-based analysis until mapped.

UNMATCHED IDENTIFIER	SALES ROWS	DASHBOARD TREATMENT
U999	1	Included in sales totals; excluded from customer and territory analysis until mapped

Field mapping used

The source column currently assigned to each dashboard field

DASHBOARD FIELD	SOURCE	MAPPED COLUMN	STATUS
Week / date	Sales Data	Transaction Date	Mapped
Revenue	Sales Data	Revenue	Mapped
Sales volume / quantity	Sales Data	Quantity	Mapped
Product	Sales Data	Product	Mapped
Brand	Sales Data	Brand	Mapped
Outlet / customer	Customer Attributes	Customer Name	Mapped
State	Customer Attributes	State	Mapped
Sales territory / region	Customer Attributes	Territory	Mapped
Sales rep / manager	Customer Attributes	Sales Rep	Mapped

Data Quality

Customer mapping and date checks

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Date checks

Dates requiring review before relying on the report

ISSUE	ROWS	DETAIL
Future-dated transactions	1	Excluded from the default date range because the transaction date is later than today.