
SALES REPORTS REFERENCE GUIDE

A reference to the five report areas in Sales Reports, the data each one returns, and the interface controls they share.

OVERVIEW

The Sales Reports section provides schools and sales reps with detailed views into yearbook and ad sales activity. Reports are organized into five areas: Yearbook Sales, Ad Sales, Order Totals, Distribution, and Personalization.

All reports share a common set of interface features:

- Side tabs to navigate between report areas
- Report Type selector to switch between reports within an area
- Filterable table columns — enter text to narrow results
- Report Year selector to view data for a specific publication year
- Date Range filter where applicable
- Export menu — download the current view as CSV or PDF. CSV files use UTF-8 encoding. PDF files include headers on every page and page numbers in “Page X of X” format.

Export filenames include the job number with publication year, the report name, and the export date/time — for example:

12345-2026-All Sales-2026-08-12.csv

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01 YEARBOOK PACKAGE SALES

Reports about yearbook package purchases. Covers both In School sales (recorded by staff) and Order Center sales (placed online through the Yearbook Order Center). All reports can be filtered by publication year.

REPORT	DESCRIPTION	KEY COLUMNS
All Sales	All yearbook package sales across both channels — In School and Order Center — combined in one view.	Last Name, First Name, Grade, Group, Student ID, Parent Emails, Confirmation #, Source, Sale Date, Package Name, Discount, Balance Due, Amount Paid
In School Sales	Package sales that were recorded in-school by staff. Filters the All Sales data to Source = In School.	Same as All Sales
Order Center Sales	Package sales placed online through the Yearbook Order Center (YOC). Includes Purchaser Name and Purchaser Email for the online buyer.	Same as All Sales + Purchaser Name, Purchaser Email
Balance Due	Sales where a payment balance remains outstanding. Useful for following up with families who paid a deposit but have not paid in full.	Same as All Sales (Balance Due column highlighted)
Non-Buyers	Students on the name list who have not purchased a package containing a yearbook item. Business names are excluded. Helps identify students who still need to order.	Last Name, First Name, Grade, Group, Student ID, Parent Emails
Buyers	Students on the name list who have purchased a package containing a yearbook item. A package must include the “Yearbook” item specifically to appear here.	Same as All Sales + Purchaser Name, Purchaser Email (for YOC orders)

02 AD SALES

Reports for schools with an active ad sales program. Covers both In School and Online Ad Center (OAC) sales. Applicable to schools using OAC or SAC programs.

REPORT	DESCRIPTION	KEY COLUMNS
All Sales	All ad sales across In School and YOC channels combined. Shows every ad transaction for the selected year.	Last Name, First Name, Grade, Group, Student ID, Confirmation, Source, Sale Date, Ad Display Name, Ad Price, Discount, Balance Due, Amount Paid, Ad Fee, School Net, Type, Purchaser Name, Purchaser Email
In School Sales	In School ad sales recorded in the Record Sales area.	Same as All Sales
YOC Sales	Ad sales placed through the Yearbook Order Center site.	Same as All Sales
OAC Status	Current status of OAC (Online Ad Center) ads — shows the state of each individual's ad in the online workflow, useful for tracking completion and follow-up.	Standard ad columns + OAC status fields
OAC Ad Not Purchased	Individuals who started an OAC ad but have not yet completed an ad purchase. Useful for follow-up outreach. <i>For instance, a buyer started 3 ads and a has purchased 1 of them, that buyer will not appear on this report since an ad has been purchased.</i>	Standard columns relevant to OAC engagement
Non-Buyers	Students for whom an ad has not been purchased. Helps identify potential ad buyers who have not yet converted.	Last Name, First Name, Grade, Group, Student ID
Bought Ad, Not Book	Students for whom an ad has been purchased but not a yearbook. Useful for cross-sell follow-up.	Standard columns showing ad purchase with no book sale on record

03 ORDER TOTALS

Aggregate summary reports showing counts and totals at a glance. These are roll-up views rather than individual-transaction lists — useful for quick tracking of overall program performance.

REPORT	DESCRIPTION	KEY COLUMNS
All Sales	Aggregate summary of all sales activity for the school — books and ads combined. Provides a high-level view of total revenue and order counts.	Totals and counts across all sales types
Yearbook Items Count	Count and totals of yearbook items sold, broken down by package or item type. Useful for assessing yearbook demand and copy count planning.	Item name, count, revenue totals
Ads Count	Count and totals of ad items sold, broken down by ad type. Useful for measuring ad program participation and page fill progress.	Ad type, count, revenue totals

04 DISTRIBUTION

Reports used to manage physical fulfillment of yearbook packages and other items. Helps staff prepare for distribution day and coordinate shipping orders.

REPORT	DESCRIPTION	KEY COLUMNS
All Packages	A complete list of all package orders for distribution. Provides staff with a full roster of students expecting a yearbook for distribution planning.	Last Name, First Name, Grade, Group, Student ID, Package Name, Source
Shipping	Orders designated to be shipped directly to the buyer rather than distributed at school. Used to coordinate fulfillment of YOC orders with a shipping address on file.	Buyer name, shipping address, package details, confirmation #

05 PERSONALIZATION

Reports for yearbook orders that include personalization add-ons. The report types available depend on which personalizations the school's book program supports. All reports are filtered by publication year.

REPORT	DESCRIPTION	KEY COLUMNS
Name Plates	All name plate orders for the publication year. Shows which students ordered a name plate personalization and the text/style selected.	Student info, name plate details, confirmation #, sale date
Name Stamps	All name stamp orders for the publication year. Shows which students ordered a name stamp personalization.	Student info, name stamp details, confirmation #, sale date
Name Imprints	All name imprint orders for the publication year. Shows which students ordered a name imprint personalization.	Student info, name imprint details, confirmation #, sale date