Directions for creating the Daily Market Summary Report for farms
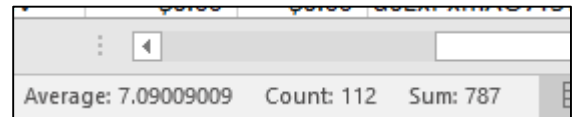
1. Open the Excel file from a single farmers' market and the Daily Market Summary Template Publisher file. For the Publisher file, do a "save as" before you begin working. Save the file in the farm's folder for that market and name it with this convention: "Daily Market Summary Report Farm Name Year Month Day"

2. In the Publisher file, enter the relevant date and names into the fields at the top.

3. Entering Values:

A. Customer Count: Click on the "transactions" tab of the Excel doc and look how many rows contain data, minus 1 for the headers. This is your customer count.

B. Total Sales & Average Customer Spend: On the same tab, highlight the entire column V, called "Gross Sales" by clicking at the top on the "V." Excel now displays the SUM in the lower bar. It also displays the Average (round this value to two places after the decimal) – this is your average customer spend.

C. Items Sold Count: Click on the "items" tab of the Excel workbook and highlight all of column G, called "Qty" by clicking on the "G." The SUM is displayed at the bottom.

D. Average items/ customer: For this value, divide the items sold count by the customer count and round to one place after the decimal.

E. Weather: Consult the Daily Market Log for this market and describe the weather in a few words, for example: "warm, no rain."

F. Items Available: Complete the sentence on the template with the number of items on the Daily Market Log.

G. Payment Type: On the "transactions" tab, click on column L, called "Card" and note the SUM at the bottom. This is the amount spent with credit cards. For the cash amount, subtract the card total from the Total Sales figure from above. Check Column P, "Other Tender" for payments using EBT or other means. Click on the "P", see if there is a SUM greater than 0, and subtract that amount from cash also.

4. Sales & Customers by Hour Chart: To create this chart, follow these instructions in Excel.
A. Create the Pivot Table.
Click on the "transactions" tab, then selecting any cell, click on the "Insert" tab on the top menu bar in Excel. On the far left of the menu bar that appears, choose "Pivot Table." The "Create Pivot Table" box opens and it should have the following selections already made: "Select a table or range" and "new worksheet." Excel will have automatically selected the entire contents of the "transactions" sheet, so you can just click "OK" and a new tab will open, probably called "Sheet 2." Rename the sheet "Pivot 1."
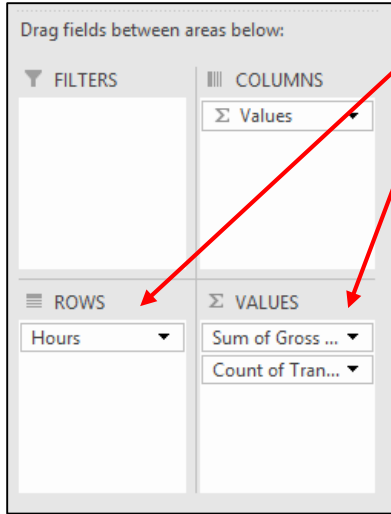
B. On the right of your screen are the "Pivot Table Fields." Drag the "Hour" field down and drop it in the "ROWS" box below. Next, click the "gross sales" field and drop it in the "VALUES" box. Also, click the "Transaction ID" field and drop it in the VALUES box.

Gross Sales: This column should display as "Sum of gross sales," if not, right click anywhere in the column, choose "summarize values as" and then SUM from the menu that appears.

Transaction ID: This column should display as "Count of Transaction ID" and can be changed in the same fashion as described above if needed.

C. Select the entire Table and right click (or CTRL C) to copy the contents. Create a new worksheet and name it "Summary" on the tab. Then click on the "Paste" menu option at the top left and select under "Paste Values" "Values and Number formatting."

D. Center all values. Rename the "Row Labels" cell "Hour." Rename the "Sum of gross sales" cell "Gross Sales" and the "Count of Transaction ID" cell "Customer Count." Reformat the "Gross Sales" figures as "Currency" with 2 spaces after the decimal by selecting "Currency" from the drop down menu under "Number" on the top menu bar.
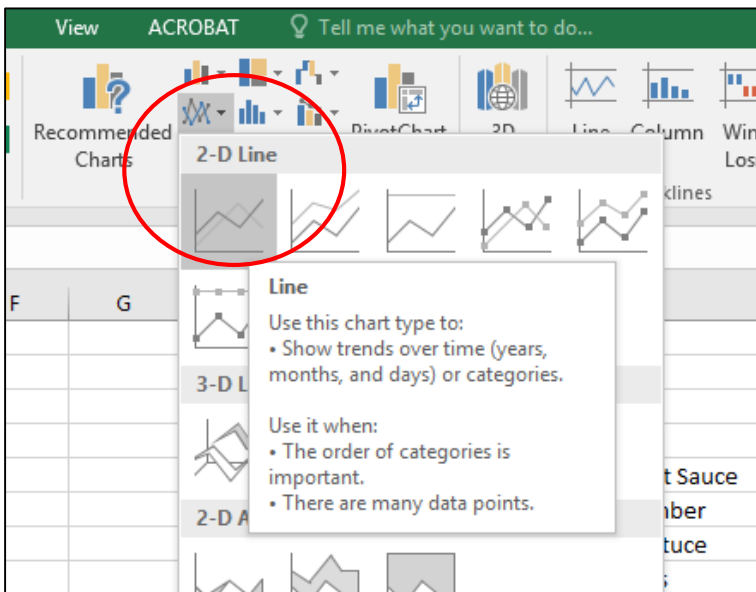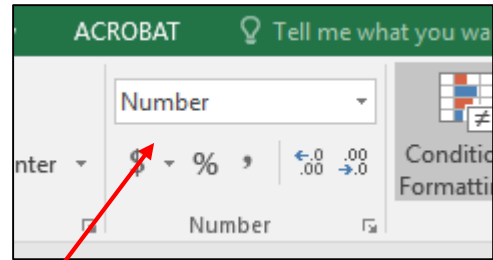
E. Creating the chart: On the "summary" tab click on an empty cell off to the left, such as G6. Next click on the "Insert" menu and choose the 1st image in the 2nd row of charts, then select the dropdown arrow and choose the 1st chart under "2-D Line" (as shown here).

Next, click "select data" on the "Chart Tools" -> "Design" menu at the top and then highlight all of the cells in the "Gross Sales" and "Customer Count" columns EXCEPT the bottom row which contains the "Grand Total." Note: do not select the "hour" column.

Next, on the "Select Data Source" window that has appeared, under the heading "Horizontal (Category) Axis Labels" click edit and select all the cells in the "Hour" column. This tells the graph which values to post to the X axis.

Next, on the graph itself, click on the line that represents customer counts. You can tell you have clicked on the correct one if it highlights the customer count column in your table. Now right click and choose "format data series." A menu opens up and you can click "secondary axis" under the "series options" menu.

F. Adding the Legend: Click anywhere on the chart and click on the "Design" menu above. In the toolbar that appears, click on the "Add chart element" drop down menu, then "Legend" and finally, "Top."

G. Next, click on the "Chart Title" words in the chart and type in using this naming convention: "Month Day Sales & Customers by Hour." If a title is not there, click on the chart, click on the box with a + symbol ("Chart Elements") and click Title from the menu that appears.
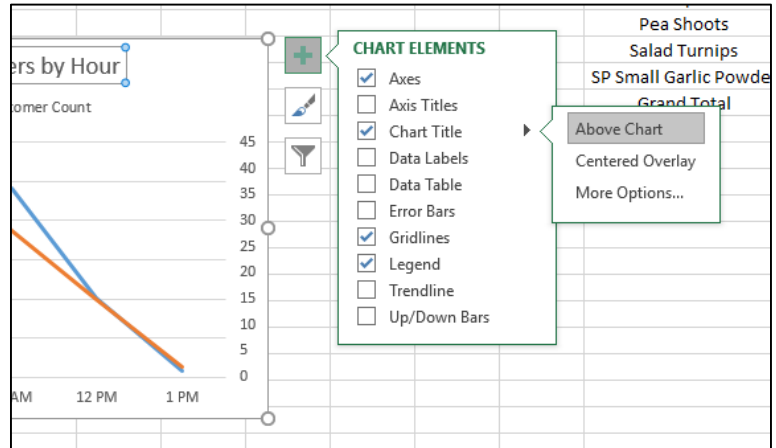
H. Now copy the chart with the right click menu and in the report template in Publisher, choose "Paste Special" from the far left of the toolbar and choose "Picture (JPG/JFIF)". Drag and drop the chart into positon and adjust the size if needed. Finally, in the Publisher file, add a black border to the chart by going to "Picture Border" under "Picture Tools" and "Format" at the top bar.

5. Creating the Items Sold, Quantity & Price Table
A. Step 1: Create the Pivot Table:
Click on the "items" worksheet tab, then selecting any cell, click on the "Insert" tab on the top menu bar. On the far left of the menu bar that appears, choose "Pivot Table." The "Create Pivot Table" box opens and it should have the following selections already made: "Select a table or range" and "new worksheet." Excel will have automatically selected the entire contents of the "items" sheet, so you can just click "OK" and a new tab will open, called "Sheet #." Rename the sheet "Pivot 2."

B. On the right of your screen are the "Pivot Table Fields." Drag the "Item" field down and drop it in the "ROWS" box below. Next, click the "gross sales" field and drop it in the "VALUES" box. Also, click the "Qty" field and drop it in the VALUES box.

Gross Sales: This column should display as "Sum of gross sales," if not, right click anywhere in the column, choose "summarize values as" and then SUM from the menu that appears.

Qty: This column should display as "Sum of Qty". Rename it to "Quantity."

C. Select the entire Table and right click (or CTRL C) to copy the contents. Click on the "Summary" worksheet. Choosing an empty area on the sheet, click on the "Paste" menu option on the toolbar at the top left of Excel and select, under "Paste Values," "Values and Number formatting."

D. Center all values. Rename the "Row Labels" cell "Item." Rename the "Sum of gross sales" cell "Gross Sales" and the "Sum of Qty" cell "Quantity." Format the "Gross Sales" figures as "Currency" with 2 spaces after the decimal.

E. Price/Unit: In the column to the right of Quantity, name a new column "Price/Unit." In the cell below the column heading, type =, then select the 1st value under Gross Sales. Next type a / to indicate division. Finally, select the 1st value under Quantity and then press the "enter" key. The Price/Unit value, as produced by the formula you just entered, will appear.

Item	Gross Sales	Quantity	Price/Unit
Cayenne Hot Sauce	$36.00	6	=L5/M5
Head Lettuce	$60.00	20	$3.00
Herbs	$21.00	7	$3.00

Drag this formula down the column by selecting the cell you wrote the formula in and dragging the small green square in the corner down, except for the last row. The rest of the values should fill in. Please verify the prices by crosschecking them on the "items" sheet. If the farm had offered discounts the price/unit displayed could be off and you may need to manually enter the correct price.

es	Quantity	Price/Unit	
	6	$6.00	
	20	$3.00	
	7	$3.00	
0	31	$3.97	
0	65	$5.00	
	15	$4.00	
	33	$3.00	
	13	$3.00	
	4	$6.00	
0	197		

Now bold the bottom and top rows of this table.

6. Pasting into Publisher and Saving

Select the entire table and right click (or CTRL C) to copy the contents. Go to the Publisher file and paste the chart and adjust as needed. Lastly, save the Publisher file as PDF.