



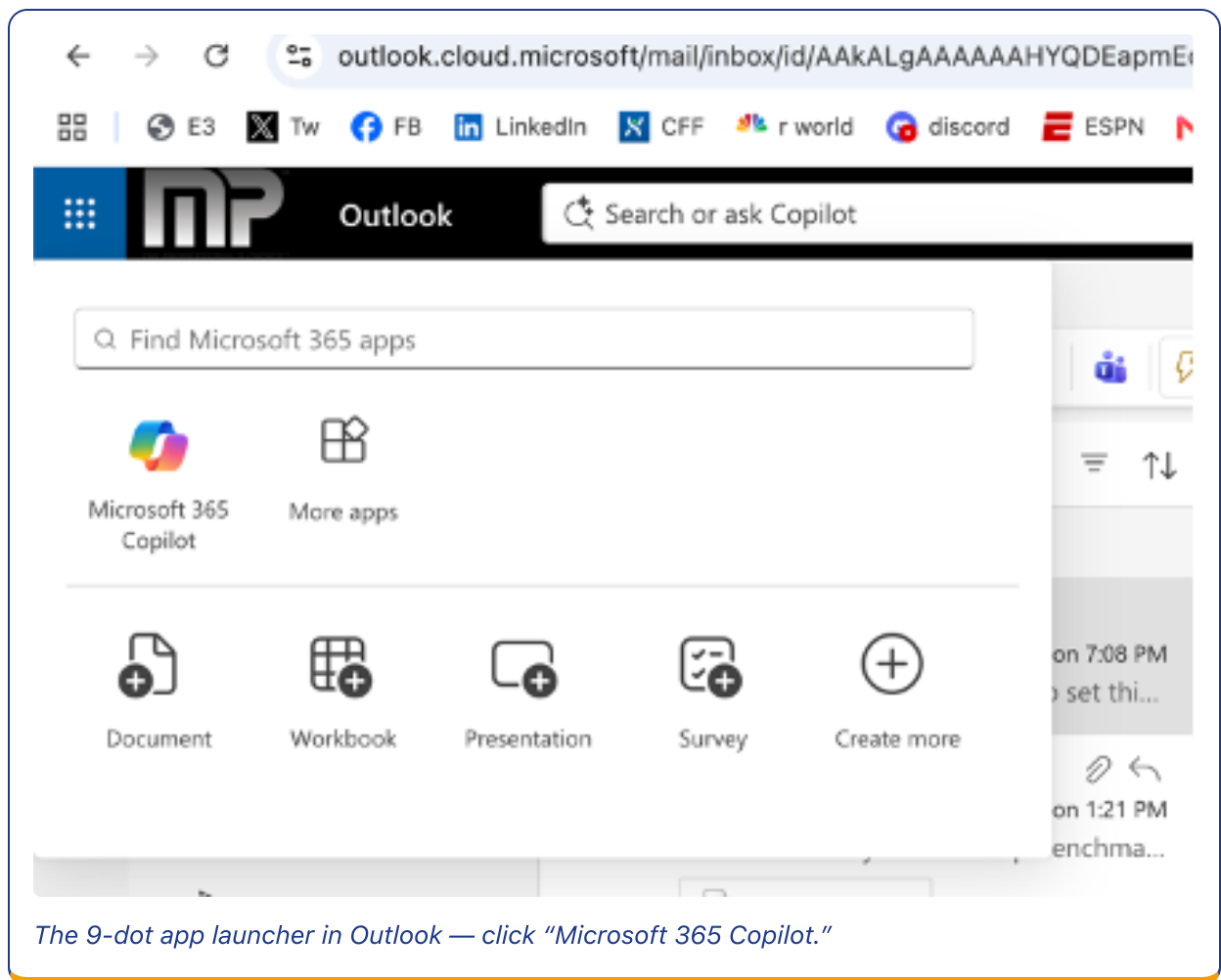
Revenue Reports with Copilot

Internal training — step-by-step procedure

Use this workflow **every month** to pull pre-revenue data from Phocas, generate per-store revenue reports through Copilot, and send them out to your customers.

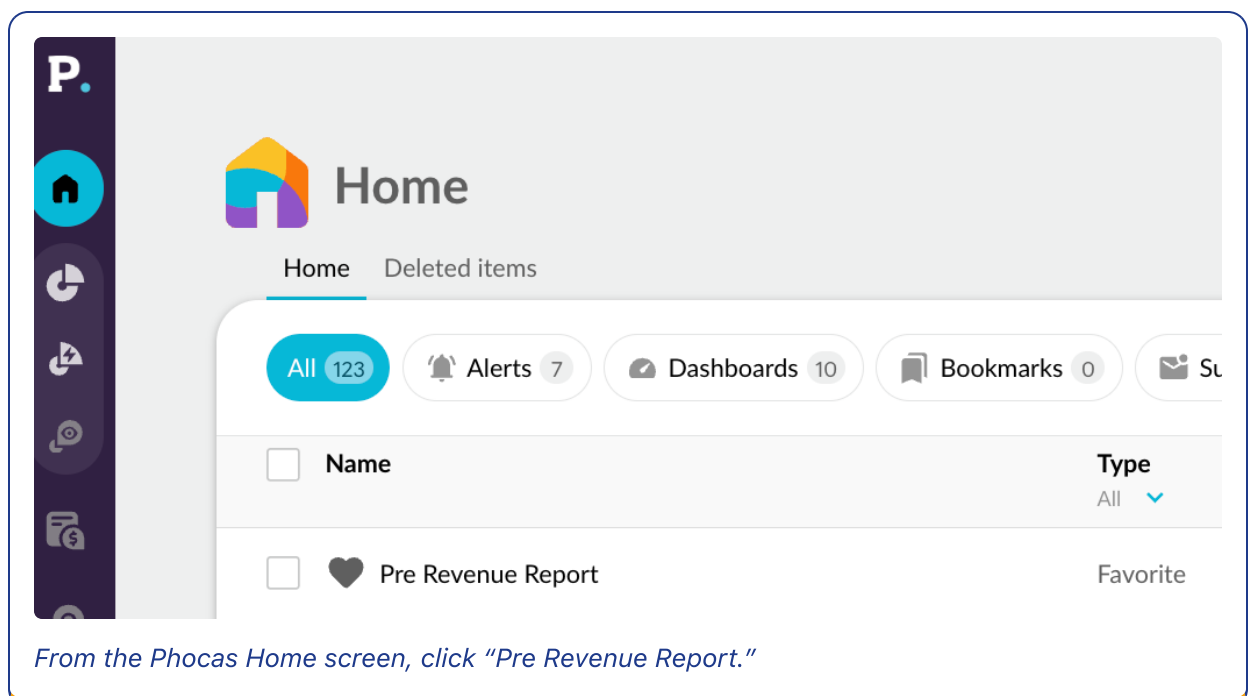
Step-by-Step

- 1 Login to Outlook.
- 2 Hover over the 9 dots in the top left, then choose **Microsoft 365 Copilot**.



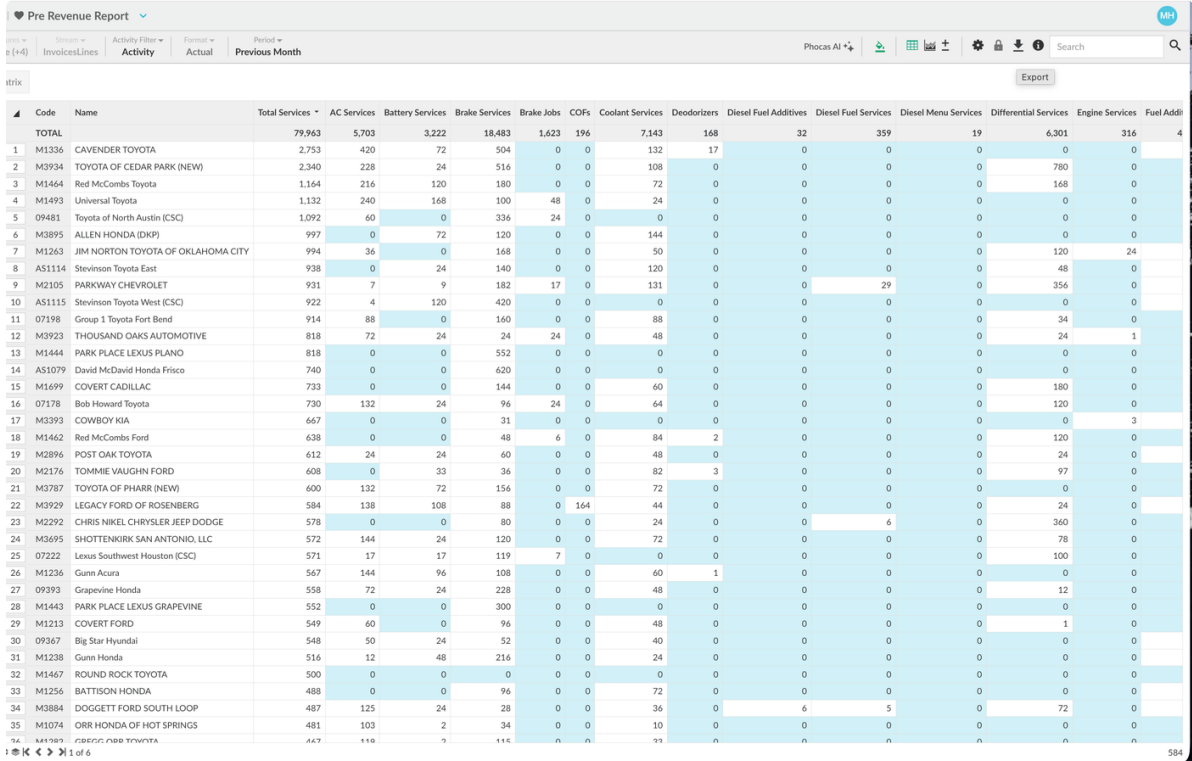
3

Go to Phocas and select **Pre Revenue Report**.



4

Export the report to Excel or CSV.

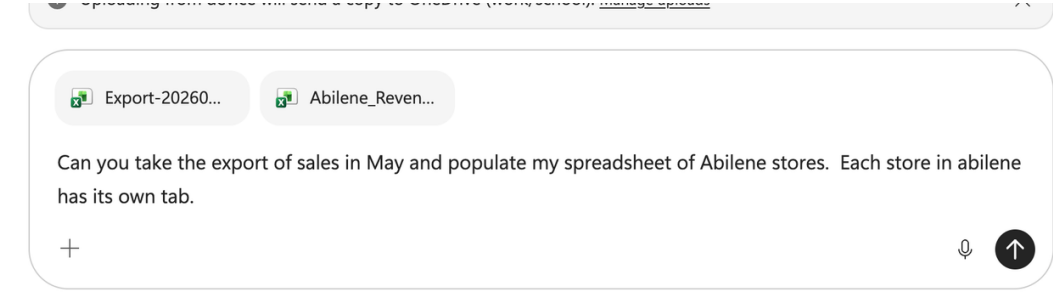


The screenshot shows a software interface titled "Pre Revenue Report". At the top, there are tabs for "Invoices", "Activity", "Actual", and "Previous Month". An "Export" button is located in the top right corner. Below the tabs is a table with columns for various services: Code, Name, Total Services, AC Services, Battery Services, Brake Services, Brake Jobs, CO's, Coolant Services, Deodorizers, Diesel Fuel Additives, Diesel Fuel Services, Diesel Menu Services, Differential Services, Engine Services, and Fuel Additives. The table lists numerous vehicle entries with their respective service counts. The "Export" button is highlighted in the top right corner of the interface.

In the Pre Revenue Report, click the "Export" button (top right) and choose Excel.

5

Open Copilot and import your revenue report spreadsheet along with your exported pre-revenue report. Use the prompt below.



The screenshot shows a Copilot chat interface. At the top, there are two uploaded files: "Export-20260..." and "Abilene_Reven...". Below the files, a text prompt is entered in the chat box: "Can you take the export of sales in May and populate my spreadsheet of Abilene stores. Each store in abilene has its own tab." The prompt is followed by a plus sign icon and a microphone icon.

Upload BOTH files into Copilot. Then type a prompt like: "Can you take the export of sales in May and populate my spreadsheet of [region] stores. Each store in [region] has its own tab."

6

When asked, answer: yes, yes, yes — and "full-service level population."

What you'll likely want next (recommended)

To fully automate this the way you probably expect (like your Houston file work):

I can:

1. Map every service category (Brake, Coolant, Fuel, etc.)
2. Populate each store tab completely for May
3. Ensure totals reconcile correctly (services + revenue alignment)

Quick next step (fastest path)

Tell me one thing:

Do you want:

- ☒ Full service-level population (every line filled for May)
- or
- ☒ Just totals + a summary sheet per store

I'll rebuild this cleanly and get you a fully aligned version in one pass.



- + full service-level population



AI-generated content may be incorrect

When Copilot asks what you want next, type: full service-level population — then send.

7

Download your file.

8

Check the file and save it to wherever you keep your reports.

A1		SERVICE																																
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	
	SERVICE	MOC#	Price	Labor	Equip	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z								
						Unnamed: 1	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER	Unnamed: 2	Unnamed: 3	Labor	Total	Revenal	Services										
1	A/C Serv	2561	129.95	1			0	0	0	12	0										12	1559.4	12											
2	Battery Se	2871	29.95	0.3			72	72	48	48	48										72	7188	240											
3	Brake Serv	6012	139.95	1			36	60	60	85	48										241	33727.95	241											
4	Brake Job	1401	29.95	0.1			0	0	0	0	0										0	0	0											
5	COPI	4011	169.95	0.5			0	0	0	0	0										0	0	0											
6	Coolant Se	5871	169.95	1			48	60	72	109	60										289	49115.55	289											
7	Deodorize Wafers	69.95	0.5				0	0	0	0	0										0	0	0											
8	Diesel Fue	1452	79.95	0.1			0	0	0	0	0										0	0	0											
9	Diesel Fue	2311	249.95	1			5	6	6	6	0										23	5748.85	23											
10	Diesel Me	3941	29.95	0.1			0	0	0	0	0										0	0	0											
11	Differentia	1481	179.95	1			0	0	0	0	0										0	0	0											
12	Engins Ser	1241	19.95	0			0	0	0	12	0										0	239.4	12											
13	Fuel Addit Enhance	69.95	0.5				0	0	0	0	2										0	0	0											
14	Complete 2321/556	199.95	1				8	0	8	8											24	4798.8	24											
15	Headlight	2911	129.95	1			0	0	0	0	0										0	0	0											
16	Menu Ser	2421	189.95	1			0	0	0	0	0										0	0	0											
17	Minor Fur	2981	149.95	1.4			0	8	0	64	0										100.8	10796.4	72											
18	Nitrogen S	5191	99.95	0.5			0	0	0	0	0										0	0	0											
19	Oil Additiv	1211	39.95	0.1			0	0	0	0	0										0	0	0											
20	Power Ste	3771	139.95	0.6			0	0	0	0	6										0	0	0											
21	Transaxel	1141	149.95	0.5			0	0	0	0	0										0	0	0											
22	Transmissi	1941	229.95	1			12	12	12	37	12										73	16786.35	73											
23	Transmissi	4113	0	0			0	0	0	8	2										0	0	8											
24	Used Car	5501	149.95	0.5			261	160	177	0	177										299	89670.1	598											
25	Garf Usec	5501G	149.95	0.5			0	0	0	0	177										0	0	0											
26	Wipers	0	0	0			0	0	0	0	0										0	0	0											
27							Total Servi	442	378	383	389	0	0	0	0	0	0	0	0	0	1133.8	219630.8	1592											
28							Total Reve	60097.9	50201.1	54470.85	54860.95	0	0	0	0	0	0	0	0	0	Total Hour Total Labor Total Services													
29							Average Pr	73.66667	63	63.83333	64.83333	0	0	0	0	0	0	0	0	0														
30																																		
31																																		
32																																		
33																																		

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What a finished revenue report should look like — every store on its own tab at the bottom, with monthly data filled in.

9

Email the per-store revenue reports out to your customers.

Email Template for Customers

Use this as a starting point when sending the per-store report. Replace [Name] with the recipient and (Your Name) with your own sign-off.

Subject: Your YTD Revenue Report — quick preview

Hi [Name],

Attached is your store's revenue report through May 2026. Here's what you're looking at:

- Service categories down the left (26 in total) with current pricing in column C.
- Monthly service counts across columns G–R (Jan–Dec) — May is in column K.
- Row 28 totals services, labor hours, and revenue by month.
- Row 30 shows average per advisor.
- V28 is your YTD revenue — the top-line number.

Let me know if anything looks off or if you'd like to walk through the numbers.

Mahalo,
(Your Name)