
INTERMEDIATE LEVEL – Growing Shop (regular customers + proper stock control)

Data Dictionary & Instructions

- **Tab: Sales**

Fill one row for each sale, or summarize at the end of the day.

Column	What it means
A – Date	The day you made the sale.
B – Order No	Any number you like (001, 002). Leave it blank if you do not use order numbers.
C – Customer Name	Who bought the item. Use the same spelling every time. The Customer List matches on this text.
D – Customer Phone	The customer's phone number. Use it to call them back.
E – Product	What you sold. Use the same name as the Product List.
F – Category	The group the product belongs to (Beverage, Noodles, Soap).
G – Quantity	How many you sold.
H – Unit Cost	How much you paid for one piece or pack.
I – Selling Price	How much the customer paid for one piece or pack.
J – Total Cost (auto)	Quantity multiplied by Unit Cost.
K – Total Sales (auto)	Quantity multiplied by Selling Price.

Column	What it means
L – Profit (auto)	Total Sales minus Total Cost. This is the money you keep.
M – Discount	How much you reduced the price. Write 0 if you gave no discount.
N – Payment Method	Cash, Transfer, or POS.
O – Staff Name	Who made the sale. Use this to pay commission later.
P – Notes	Anything special about the sale.

- **Tab: Stock Movement**

Fill one row each time new stock arrives.

Column	What it means
A – Date	The day the new stock arrived.
B – Product	The item you restocked. Spell it the same as in the Sales tab.
C – Category	The group the product belongs to.
D – Qty Added (Restock)	How many pieces or packs you brought in.
E – Unit Cost	How much you paid for one piece or pack this time.
F – Total Cost of Restock (auto)	Qty Added multiplied by Unit Cost.
G – Qty Sold	How many you sold since the last restock. Type this figure yourself.
H – Current Stock Balance (auto)	How many pieces or packs are left after this row.
I – Supplier Name	Who you bought the stock from.
J – Invoice No.	The supplier's invoice or receipt number.

- **Tab: Expenses**

Write every payment here on the day you pay it. This tab has no formulas.

Column	What it means
A – Date	The day you spent the money.
B – Expense Type	What you spent on. Rent, NEPA, Fuel, Salary, Transport, or Packaging.
C – Amount	How much you spent, in naira.
D – Paid To	Who received the money.
E – Notes	Anything special about the payment.

- **Tab: Customer List**

Add each customer once, the first time they buy. The rest fills itself.

Column	What it means
A – Customer ID	A short code for each customer (CUST0001, CUST0002).
B – Customer Name	Spell it exactly as in the Sales tab. The formulas match on this text.
C – Customer Phone	The customer's phone number.
D – Total Spent So Far (auto)	Everything this customer has paid you.
E – Last Visit Date (auto)	The date of their most recent order.
F – Visits Count (auto)	How many times they have bought from you.
G – Loyalty Points (optional)	Your own reward points. Type these yourself, or leave the column blank.

Key formulas (already inside)

- **Tab: Sales (Row 2)**

Column	Formula (Row 2 → drag down)
Total Cost (auto) – J2	=G2*H2 (Quantity × Unit Cost)
Total Sales (auto) – K2	=G2*I2 (Quantity × Selling Price)
Profit (auto) – L2	=K2-J2 (Total Sales – Total Cost)

- **Tab: Stock Movement (Row 2)**

Column	Formula (Row 2 → drag down)
Total Cost of Restock (auto) – F2	=D2*E2 (Qty Added × Unit Cost)
Current Stock Balance (auto) – H2	=SUMIFS(\$D\$2:D2,\$B\$2:B2,B2)-SUMIFS(\$G\$2:G2,\$B\$2:B2,B2) (All restock for this product – all sold, up to this row)

The dollar signs lock the top of each range. The bottom grows as you drag the formula down. Each row then shows the balance as at that row.

Sort this tab by date, oldest first. The running balance reads correctly only in date order.

- **Tab: Customer List (Row 2)**

Column	Formula (Row 2 → drag down)
Total Spent So Far (auto) – D2	=SUMIFS(Sales!K:K,Sales!C:C,B2) (Adds every sale for this name)

Column	Formula (Row 2 → drag down)
Last Visit Date (auto) – E2	=IF(COUNTIFS(Sales!C:C,B2)=0,"",MAXIFS(Sales!A:A,Sales!C:C,B2)) (The newest sale date for this name)
Visits Count (auto) – F2	=COUNTIFS(Sales!C:C,B2) (Counts the orders for this name)

MAXIFS returns 0 when a customer has no sale yet. Google Sheets shows that 0 as 30/12/1899. The IF test keeps the cell empty instead.

A customer whose name is spelled two ways counts as two customers. Check the spelling before you add a new row.

Known gap: the Discount column

The Sales tab records a discount in column M. No formula uses that figure. Total Sales and Profit both ignore it, so a discount does not reduce the profit the workbook reports.

To subtract the discount, change the Profit formula in L2 to =K2-J2-M2 and drag it down. Decide this before you start, and keep it the same for every row.

Instructions

1. Open the file every day.
2. Fill one row in the Sales tab for each sale.
3. Write the customer name the same way every time.
4. Fill one row in the Stock Movement tab each time new stock arrives.
5. Write every payment in the Expenses tab on the day you pay it.
6. Add a new customer to the Customer List once, when they first buy.
7. Never delete Row 1.
8. Never rename a column.
9. Never rearrange the columns.
10. Never rename a tab.
11. Never rearrange the tabs.
12. Never type in a column marked (auto).
13. **Load into inView and the sheet will automatically tell you:**
 - Who your top customers are.
 - Which items are finishing.

- Your real profit after expenses.
- Which staff member sells the most.

