

BOULEVARD

THE ULTIMATE GUIDE TO

Salon & Spa Enterprise Reporting

*Tips and tools for all enterprise
reporting essentials*

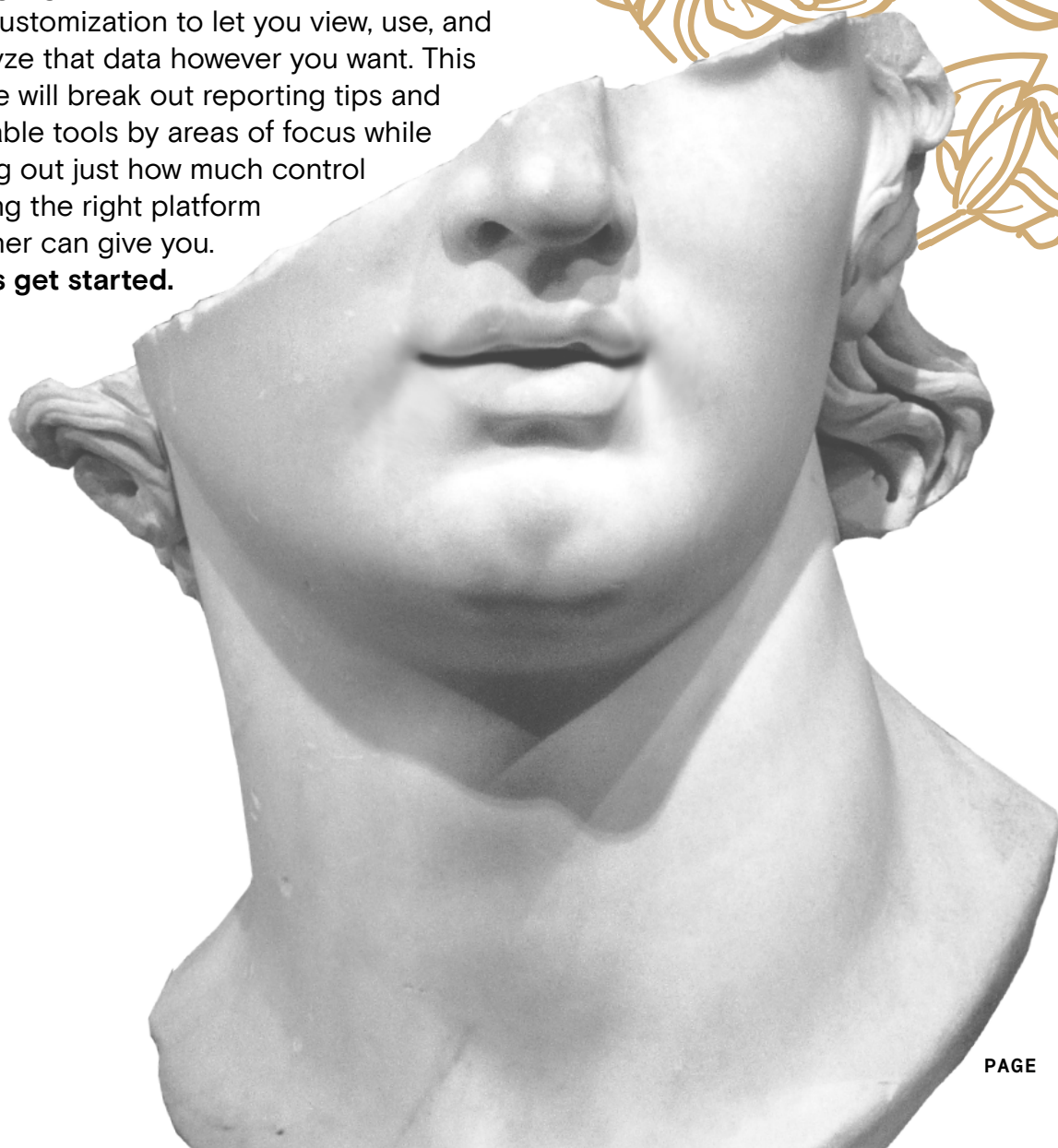
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Every enterprise business has different needs when it comes to reporting, which is why customization is key. From your salon or spa's specific practices to your team's area of function, there are particular data points and nuances that are more or less valuable to assess — and you don't want to be bogged down by wide-reaching reports that cover too much. As a CEO or COO, you're likely the most interested in overarching business performance and location, region, or territory-level metrics. A CFO? Profit and loss are your areas of focus. A CMO and VP of Marketing will want to look at campaign success in relation to client retention, and so on and so on.

No matter your role, the most powerful reports should act not only as templates to highlight needed data, but also allow for full customization to let you view, use, and analyze that data however you want. This guide will break out reporting tips and valuable tools by areas of focus while laying out just how much control having the right platform partner can give you.

Let's get started.



Breaking Out Your Business Performance

Classic BLVD Reports									
Daily Summary Edit									
Last Updated 1:40 PM Duplicate Share Export Feb 7, 2021 - Feb 19, 2021									
Customize Report Filter Report									
Sale Date	Appointment Count	Requested Appointment Count	Service Count	Service Sales	Service Sales Tax	Product Quantity Sold	Product Sales	Product Sales Tax	Tip Sales
8 rows	3209	2260	3210	\$679,225.80	\$3,130.37	3285	\$309,155.10	\$7,924.44	\$133,291.22
2/12/2021	523	379	523	\$108,025.50	\$365.20	523	\$47,410.63	\$935.72	\$21,479.64
2/13/2021	589	427	589	\$121,143.50	\$454.16	589	\$55,610.40	\$1,391.88	\$23,595.26
2/14/2021	420	291	420	\$82,898.60	\$494.27	420	\$41,271.16	\$1,196.77	\$15,874.49
2/15/2021	397	276	397	\$79,583.50	\$341.70	397	\$35,132.50	\$676.61	\$15,964.81
2/16/2021	433	305	433	\$91,971.00	\$516.46	433	\$41,348.90	\$1,087.66	\$18,249.00
2/17/2021	435	297	435	\$112,670.20	\$396.30	435	\$41,477.46	\$1,124.66	\$22,198.25
2/18/2021	391	273	391	\$80,668.50	\$433.45	391	\$37,680.70	\$1,103.67	\$15,641.32
2/19/2021	21	12	22	\$2,265.00	\$128.83	97	\$9,223.35	\$507.47	\$288.45

When it comes to reports, we might as well start at the top. Your overall business performance is going to be a crucial area of focus. But, while a top-down level is helpful, the best reporting features allow you to slice and dice the data any way you want. You need flexible functionality that allows you to isolate metrics by location, territory, and region and even drill down into specific data points to understand how they were calculated to analyze how each level of your business is performing.

And this is where customization becomes your biggest asset. Boulevard provides multiple customizable report templates that can be tailored to your specific needs and views (plus, our support team is available for real-time help if you ever run into a reporting question). Here are some of the most helpful reports that highlight performance:





DAILY SUMMARY REPORT:

This is your go-to for a high-level look at things like overall business performance, daily sales, product sales, tips, and the number of appointments booked that can be tailored to be as overarching or granular as needed.



DETAILED LINE ITEM REPORT:

Details are the name of the game here. Adjust your views for product-focused reports, analyze which services are most profitable, and ultimately dissect all sales information as narrowly as you need. You can also easily export all info into any third-party database you may be using to itemize your sales.



LOCATION & STAFF RETENTION REPORTS:

These reports allow you to assess which staff members and locations are seeing the most returning clients, so you can keep an eye on who transforms the most visitors into long-term clients and which locations keep the most people coming back. We also offer a **Referral Sources Report** that shows you where or who your new clients are coming from, allowing you to adjust your marketing spend if you find certain social channels are driving more visits than staff word-of-mouth.





DISCOUNTS & OFFERS REPORTS:

If you want a marketing deep dive, Boulevard also offers reports to dissect how much money certain discounts and offers are driving to your business.



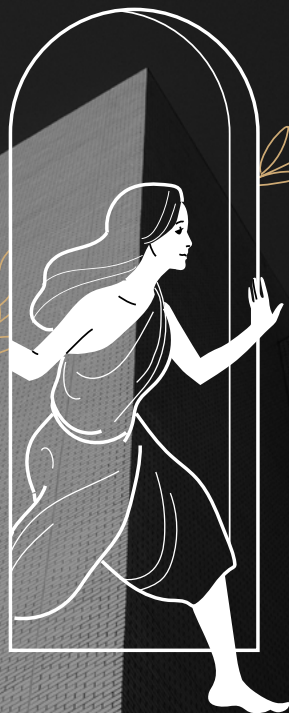
CLIENT SALES REPORT:

We know you pride yourself on personalized service. This report helps you understand your top spending clients so you can alert your staff and ensure they are giving them extra special treatment.

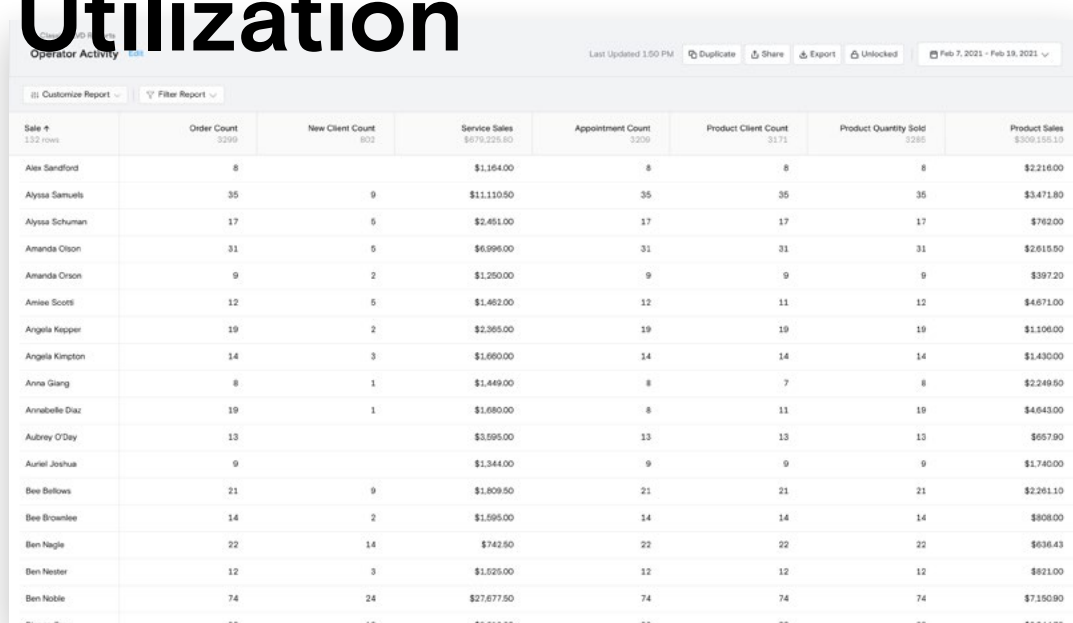


FORECASTING REPORT:

Want to know what kinds of numbers to expect? This report has you covered. Since the Boulevard platform allows you to save individualized client pricing to create a seamless, tailored experience, this allows for extremely accurate sales forecasting to keep you on track.



Optimizing Employee Utilization



The screenshot displays a software interface for 'Operator Activity'. At the top, it shows 'Last Updated 1:50 PM' and buttons for 'Duplicate', 'Share', 'Export', and 'Unlocked'. A date range selector is set to 'Feb 7, 2021 - Feb 19, 2021'. Below this is a 'Customize Report' and 'Filter Report' section. The main table lists 132 rows of data for various staff members, with columns for Order Count, New Client Count, Service Sales, Appointment Count, Product Client Count, Product Quantity Sold, and Product Sales.

Sale #	Order Count	New Client Count	Service Sales	Appointment Count	Product Client Count	Product Quantity Sold	Product Sales
132 rows	3299	802	\$679,225.80	3209	3171	3285	\$306,195.10
Alex Sandford	8		\$1,164.00	8	8	8	\$2,216.00
Alyssa Samuels	35	9	\$11,110.50	35	35	35	\$3,471.80
Alyssa Schuman	17	5	\$2,451.00	17	17	17	\$762.00
Amanda Olson	31	5	\$6,996.00	31	31	31	\$2,615.50
Amanda Olson	9	2	\$1,250.00	9	9	9	\$397.20
Amilee Scott	12	5	\$1,462.00	12	11	12	\$467.00
Angela Kepper	19	2	\$2,365.00	19	19	19	\$1,066.00
Angela Kimpton	14	3	\$1,660.00	14	14	14	\$1,430.00
Anne Giang	8	1	\$1,449.00	8	7	8	\$2,249.50
Annabelle Diaz	19	1	\$1,680.00	8	11	19	\$4,643.00
Aubrey O'Day	13		\$3,595.00	13	13	13	\$657.90
Auriel Joshua	9		\$1,344.00	9	9	9	\$1,740.00
Bee Bellows	21	9	\$1,809.50	21	21	21	\$2,261.10
Bee Brownlee	14	2	\$1,595.00	14	14	14	\$808.00
Ben Nagle	22	14	\$742.50	22	22	22	\$636.43
Ben Neester	12	3	\$1,525.00	12	12	12	\$821.00
Ben Noble	74	24	\$27,677.50	74	74	74	\$7,150.90
Rianca Gray	32	10	\$5,610.00	32	32	32	\$3,044.70

Your staff members are a reflection of your brand as a whole, so it's important to stay on top of both how well they are performing and how much you're empowering them to be their best. Luckily, Boulevard gives you the flexibility to come at this from all different angles, including seeing how much money your individual staff members are bringing in and even identifying opportunities for coaching.

This level of control is a huge booster to your business performance, the success of your managers, and the careers of your professionals...all from powerful reporting. **Here's where to look:**



APPOINTMENT METRICS REPORT:

This gives you a bird's eye view of your booked appointments, from what services are booked, to how many are coming in day after day, to which staff members booked them, so you can ensure proper employees are getting credit for bringing in clients.



OPERATOR ACTIVITY REPORT:

Success tracking can go beyond appointment-performing professionals. This report lets you see your top sellers at the front desk. You can also assess how to make the most of front desk utilization hours to reduce downtime and keep staff productive.



OVERALL SALES PER APPOINTMENT:

Who's bringing in the big spenders? This lets you know. Analyze which staff members are averaging the highest ticket values on a consistent basis. You can also break it out by location to see which area is performing best and adjust workforces if needed.



STAFF PERFORMANCE REPORT

This is a great tool in identifying which staff members are contributing the most value. By monitoring each employee's performance down to the specific products and services they're selling, you can reward top performers, encourage upsells to boost those falling behind, and even export information to Excel and turn it into graphs that can be used in coaching or 1:1s.



Keeping Track of Cross-Location Reconciliation



Gift Card Liabilities						
Last Updated: 1:50 PM Duplicate Share Export Unlocked Save Changes						
20 Customize Report Filter Report						
GiftCardLiability	Purchasing Client	Location Name	Gift Card Code	Gift Card Type	Gift Card Balance	
20 rows				Cash	\$4,200.00	
2d05db4e-ca17-47e2-b732-b6f4c3881739	Candice Andrews	Beverly Hills	3217791214	Cash	\$400.00	
32d90ebb-281b-4156-8a98-af760520ce13	Annie Scott	Beverly Hills	1421822970	Cash	\$500.00	
37b0cd9b-6f2-423f-8828-ca971329562	Ariel Baker	Beverly Hills	9984237922	Cash	\$200.00	
54c5ea93-07b4-470a-b795-d775e1e394dd	Ara Hathaway	Beverly Hills	2448130984	Cash	\$350.00	
5eaa8f81-d3fc-4ba1-9e12-cfb4172240e	Addison Torres	Beverly Hills	0487651343	Cash	\$300.00	
9993517-4c3c-4ba9-9951-600eda5dee3	Bella Malik	Beverly Hills	7479088432	Cash	\$500.00	
653ac71e-2d1b-4842-9eb7-6cb6e93bc763	Analisa Chen	Calabasas	1374928786	Cash	\$400.00	
b95ef545-7895-4f9e-831f-143a02a9b9d4	Anne Ginsberg	Hermosa Beach	6499883343	Cash	\$500.00	
208aff7b-ba3f-4a9b-81cb-b10623fe9c1b	Brittany Jones	Hollywood	2528298330	Cash	\$100.00	
533cd995-21a4-456c-aed5-25fc171794e8	Alice Williams	Hollywood	9401297154	Cash	\$300.00	
07c35f2a-b577-4db4-9b05-feb04e35e10e	Ashley Wang	New York	6597310652	Cash	\$400.00	
61deffac-b945-4d2e-b88c-c220c7144e2d	Ilana Stracke	New York	5628	Cash	\$50.00	
aafac8a6-bc43-40ab-8cc6-427be812d25b	Alicia Johnson	New York	5963472955	Cash	\$200.00	
cab1c92f-38e8-4106-8aed-dc081cb7eb5d	Vivian Muller	New York	5171	Cash	\$50.00	
2795a15-b519-482f-8381-915561cc4f8	Alexandra Wilson	San Diego	3479103782	Cash	\$200.00	
49a71cf2-5ac1-4af5-ab6f-4118620bf8ed	Garett Altenwerth	San Diego	6101-2	Cash	\$50.00	
68d43798-7212-40c8-8944-70c4363fc527	Aishwarya Patel	San Diego	6628315817	Cash	\$400.00	
812d9803-41a2-4bbe-9221-fb354559f869	Deondre Kunde	San Diego	252899	Cash	\$50.00	

When it comes to reconciliation, the biggest necessity is having the ability to track everything across all locations. If a customer buys a membership at one location and redeems it at another, the original location may be owed the value of that voucher to keep the books balanced. If you're unable to track these nuances, your sales and drawers will appear off and a spiral of headaches are sure to ensue. Boulevard has your detailed reconciliation reporting covered, so you can crunch the numbers stress-free.

And not only does this mean you can keep memberships and gift cards redeemable at all locations, but Boulevard's platform also allows clients to book anywhere they'd like without creating a new profile. Seamless for them, reputation-building for you.



GIFT CARD LIABILITIES:

Keep your finger on the pulse of all issued gift cards including what's outstanding and which clients' cards have unused balances.



MEMBERSHIP LIABILITY & REDEMPTION:

Have any outstanding membership benefits? You'll want to be able to track those from the business side so you can understand all your books properly. This report gives you a full view of where items are purchased and redeemed at all location levels.

When it comes to reconciliations, you also want to make sure you are working with a partner who is willing to help you handle everything along the way. While most platforms leave you on your own to deal with outside payment providers, Boulevard's dedicated support team is fully on-board to help take on these tasks for you. Additionally, you no longer need to reconcile from an outside terminal. Reconciliation is fully integrated into the Boulevard platform, which means no more wasting time matching credit card numbers to your dashboard and no more room for human error — it's all done for you.

Plus, all credit card disputes, transfers, and credit card fees live within the dashboard, so you can see everything in real-time and react to it as needed instead of just getting a statement from your processor later on.



Having a Full Eye on Inventory

Classic BLVD Reports

Inventory On-Hand [Edit](#)

Last Updated: 2:00 PM [Duplicate](#) [Share](#) [Print](#) [Unlocked](#) [Save Changes](#)

[Customize Report](#) [Filter Report](#)

Product/Location	Product Name	Location Name	Current Quantity	Cost Value	Price Value	Profit Value
371 rows			-10163	\$18,676.42	\$0.00	(\$18,676.42)
47f5191b-432c-4de7-e635-e73a88b4b699	Onbe Gold Lust Repair & Restore Shampoo 8.5 oz	New York	49	\$0.00	\$2,401.00	\$2,401.00
d8a1ba0e-e47f-4eb2-9a07-c2960e5340e5	Kérastase Bain Densité 250 ml	New York	47	\$0.00	\$4,042.00	\$4,042.00
716db244-2f2-459a-8cda-39b6a0cc07e	Barcelona Purple Shampoo	Beverly Hills	37	\$740.00	\$1,184.00	\$444.00
7350748a-50b4-4b84-896c-59d97c3ee39c	Shu Uemura Wonder Worker 150 ml	Beverly Hills	37	\$610.50	\$1,221.00	\$610.50
cf125f84-c63f-4695-b6ad-b4412053bf10	Shu Uemura Wonder Worker 150 ml	Hollywood	37	\$0.00	\$1,221.00	\$1,221.00
437aba36-3ab5-44a3-8887-6a0786726ab8	Shu Uemura Wonder Worker 150 ml	Santa Monica	37	\$610.50	\$1,221.00	\$610.50
06ae7421-e05b-43bc-81db-d272d2b0a94	Kérastase Ciment Thermique 150 ml	New York	36	\$0.00	\$1,548.00	\$1,548.00
0a7d364f-b380-476e-9536-2e70d8af05d8	Kérastase Original Oil 100 ml	Beverly Hills	36	\$1,044.00	\$2,088.00	\$1,044.00
0f896671-0c5e-4536-b3a0-ed3ada95cb5e	Kérastase Original Oil 100 ml	Santa Monica	36	\$1,044.00	\$2,088.00	\$1,044.00
70bc1048-199d-4882-840c-c40d67a1141	Shu Uemura Wonder Worker 150 ml	New York	36	\$0.00	\$1,188.00	\$1,188.00
b3dbcf3c-69f0-441c-82b7-f37910ab896	Kérastase Original Oil 100 ml	Hollywood	36	\$0.00	\$2,088.00	\$2,088.00
e0211123-155f-483f-8aef-363d81b01d93	Kérastase Original Oil 100 ml	New York	36	\$0.00	\$2,088.00	\$2,088.00
349cb95-3a48-442e-8092-bdbcd91a002e	Murad Essential-C Daily Renewal Complex 1 oz	Beverly Hills	34	\$0.00	\$3,230.00	\$3,230.00
4f892a8-498d-4eae-bf00-934019468f0c	Murad Essential-C Daily Renewal Complex 1 oz	San Diego	34	\$0.00	\$3,230.00	\$3,230.00
76956c10-ef1f-4896-9928-df9a95c03076	Murad Essential-C Daily Renewal Complex 1 oz	Santa Barbara	34	\$0.00	\$3,230.00	\$3,230.00
0fac3156-e996-4cfc-b884-957ec0a688e	Murad Essential-C Daily Renewal Complex 1 oz	Santa Monica	34	\$0.00	\$3,230.00	\$3,230.00
d592f5f9-2657-4643-b41e-a0c1bb06a2e6	SkinMedica Retinol Complex 0.5 1 oz	Beverly Hills	34	\$0.00	\$2,652.00	\$2,652.00
463c13c7-7241-47d0-8e05-7efb774ca76	SkinMedica Retinol Complex 0.5 1 oz	Santa Monica	34	\$0.00	\$2,652.00	\$2,652.00

Now let's look at the beast that is back-of-house. Inventory reports are crucial in helping you understand what you're purchasing vs what is being sold, so it's important that you can assess everything down to the location, territory, or region level.

Other than helping you understand which products are moving the fastest, a detailed overview can assist your marketing team in creating new offers or campaigns to move products off the shelf or even enhance your staff's understanding of a product's upsell potential.

With Boulevard's inventory reports, you're not only in-the-know, you're in control and boosting sales with every assessment.



INVENTORY ON HAND:

This feature gives you a detailed view of specific on-hand product quantities per location to show you what's selling fast or slow, allowing you to make sure you only order as much as you're selling instead of too much or too little. You're also able to track the status of when orders are placed and when they've shipped, so you know what's coming and when.



INVENTORY ADJUSTMENTS:

You deserve a customizable look at every individual product and area. These adjustments allow you to analyze the performance of back bar professional-only products separately from how your retail at the front desk is moving. This makes it easy to control your costs, quickly see what's being used, and look at how much is being lost, all separately. You are also able to mark products as stolen and pull reports on what is missing after individual recounts over time. This gives you full visibility on how many errors are in your inventory while also showing you all activity through staff profiles, so you can see who made adjustments and ask what went wrong (which is great for coaching moments). All of this can also be assessed down to the location-level to identify which stores may need extra attention.

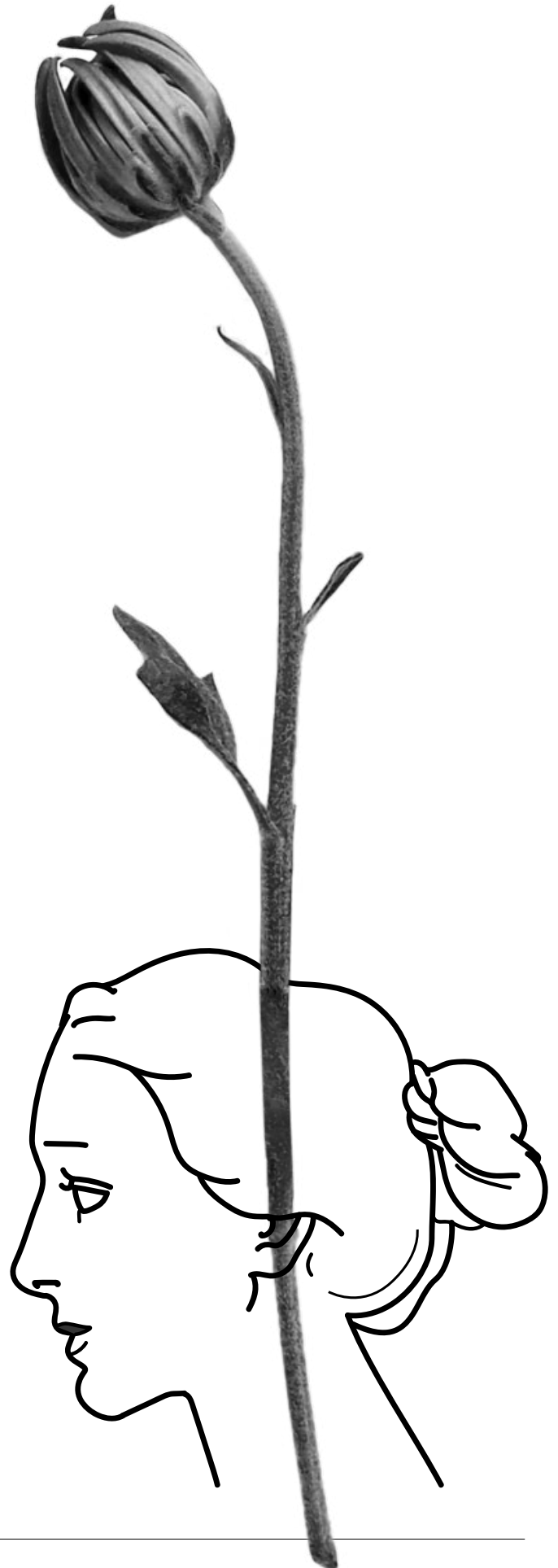


Additionally, the overall setup of Boulevard's inventory within the platform makes reporting and tracking extremely simple. For example, you only need to add your products to the platform one time and enable them per location as opposed to entering each product for each location. It also makes purchase ordering extremely simple, with any missing money being highlighted right away. This means you can also quickly see what's overdue and see which products are pending to be delivered so you don't order those again.

Easy Access to APIs

Having access to powerful custom reports is great on its own, but being able to export and amplify those reports is an extremely helpful addition. When in doubt, make sure you have access to public APIs that allow you to export your data as needed. The beauty of Boulevard is that we have all the data points outlined for you to get you where you need and to help you monitor performance at any level. But, if you want to analyze your data against any other third-party BI platform you're using, we also make it easy to transfer anything you need through our APIs. It's important to us that any systems you're using outside of Boulevard are working together in harmony. We're not only here to help with reporting capabilities, we're also here to help you connect all the dots.

Enterprise reporting can be nuanced and tough to tackle. But this guide is here to make it easy for you to identify helpful areas of focus while highlighting tools that can give you full control of how you slice and dice your data. Now that you know which areas you need to pay attention to, all you need is a Boulevard partnership to give you full enterprise reporting power.



THANK
BLVD
you