OCTOBER 2026 | Sales Summary & Transaction Register

Prepared for Microsoft 365 Copilot demonstration • Illustrative management report • Currency: Indian Rupees (INR)

INVOICES	GROSS SALES	DISCOUNT	TAXABLE VALUE	GST	INVOICE VALUE	COLLECTED	OUTSTANDING
31	■7,217,000	■195,000	■7,020,000	■1,263,000	■8,287,000	■5,531,000	■2,754,000

Sales mix by product category

	Invoice Value	Share
	■3,768,000	45.5%
	■1,895,000	22.9%
	■1,290,000	15.6%
	■849,000	10.2%
g	■485,000	5.9%

Sales Representative	Invoice Value
Vikram Joshi	■2,459,000
Amit Patel	■2,117,000
Riya Shah	■1,673,000
Karan Mehta	■1,182,000
Neha Desai	■856,000

Customer	Invoice Value
Northstar Packaging	■2,10
Helix Pharma Systems	■1,23
Kavya Textiles	■1,20
Pinnacle Engineering Works	■1,11
Greenfield Chemicals	■71

Transaction register

	Invoice No.	Customer	Industry	Product / Service	Category	Sales Rep	Taxable Value	GST	Invoice Total	Collected	Balance	Status
-2026	TEPL/2026/10/214	Helix Pharma Systems	Pharmaceuticals	System Integration & Deployment	Services	Amit Patel	■221,000	■40,000	■261,000	■0	■261,000	Outstanding
-2026	TEPL/2026/10/215	Helix Pharma Systems	Pharmaceuticals	IT Infrastructure AMC	Services	Neha Desai	■178,000	■32,000	■210,000	■0	■210,000	Outstanding
-2026	TEPL/2026/10/202	Futura Finance Services	Financial Services	Microsoft 365 & Software Licences	Software	Riya Shah	■30,000	■5,000	■36,000	■36,000	■0	Paid
-2026	TEPL/2026/10/206	Dharma Education Group	Education	Microsoft 365 & Software Licences	Software	Amit Patel	■32,000	■6,000	■38,000	■38,000	■0	Paid
-2026	TEPL/2026/10/218	Kavya Textiles	Textiles	Microsoft 365 & Software Licences	Software	Amit Patel	■27,000	■5,000	■32,000	■0	■32,000	Outstanding
-2026	TEPL/2026/10/230	Pinnacle Engineering Works	Engineering	System Integration & Deployment	Services	Vikram Joshi	■402,000	■72,000	■475,000	■333,000	■142,000	Partially Paid
-2026	TEPL/2026/10/231	Crestline Engineering	Manufacturing	Network Switches & Routers	Networking	Vikram Joshi	■196,000	■35,000	■231,000	■231,000	■0	Paid
-2026	TEPL/2026/10/212	Evergreen Foods Pvt Ltd	FMCG	IT Infrastructure AMC	Services	Riya Shah	■231,000	■42,000	■272,000	■272,000	■0	Paid

	Invoice No.	Customer	Industry	Product / Service	Category	Sales Rep	Taxable Value	GST	Invoice Total	Collected	Balance	Status
-2026	TEPL/2026/10/213	Dharma Education Group	Education	Backup & Data Protection	Software	Vikram Joshi	■119,000	■21,000	■140,000	■0	■140,000	Outstanding
-2026	TEPL/2026/10/209	Greenfield Chemicals	Manufacturing	Network Switches & Routers	Networking	Neha Desai	■215,000	■39,000	■254,000	■126,000	■127,000	Partially Paid
-2026	TEPL/2026/10/219	Northstar Packaging	Manufacturing	Enterprise Servers & Storage	Hardware	Riya Shah	■730,000	■131,000	■862,000	■862,000	■0	Paid
-2026	TEPL/2026/10/221	Kavya Textiles	Textiles	Enterprise Servers & Storage	Hardware	Karan Mehta	■732,000	■132,000	■864,000	■432,000	■432,000	Partially Paid
-2026	TEPL/2026/10/220	Northstar Packaging	Manufacturing	Business Laptops & Workstations	Hardware	Amit Patel	■76,000	■14,000	■90,000	■0	■90,000	Outstanding
-2026	TEPL/2026/10/203	Helix Pharma Systems	Pharmaceuticals	Microsoft 365 & Software Licences	Software	Amit Patel	■89,000	■16,000	■105,000	■0	■105,000	Outstanding
-2026	TEPL/2026/10/226	Pinnacle Engineering Works	Engineering	Enterprise Servers & Storage	Hardware	Vikram Joshi	■545,000	■98,000	■643,000	■643,000	■0	Paid
-2026	TEPL/2026/10/222	Jupiter Retail Ventures	Retail	Firewall & Network Security	Security	Neha Desai	■332,000	■60,000	■392,000	■392,000	■0	Paid
-2026	TEPL/2026/10/201	Greenfield Chemicals	Manufacturing	Business Laptops & Workstations	Hardware	Karan Mehta	■84,000	■15,000	■100,000	■30,000	■69,000	Partially Paid
-2026	TEPL/2026/10/210	Northstar Packaging	Manufacturing	Enterprise Servers & Storage	Hardware	Amit Patel	■707,000	■127,000	■835,000	■835,000	■0	Paid
-2026	TEPL/2026/10/217	Meridian Public Services	Government	Microsoft 365 & Software Licences	Software	Karan Mehta	■74,000	■13,000	■88,000	■0	■88,000	Outstanding
-2026	TEPL/2026/10/223	Aarav Auto Components	Manufacturing	Firewall & Network Security	Security	Vikram Joshi	■248,000	■45,000	■293,000	■293,000	■0	Paid
-2026	TEPL/2026/10/224	Greenfield Chemicals	Manufacturing	Firewall & Network Security	Security	Amit Patel	■308,000	■55,000	■363,000	■0	■363,000	Outstanding
-2026	TEPL/2026/10/225	Kavya Textiles	Textiles	Microsoft 365 & Software Licences	Software	Amit Patel	■37,000	■7,000	■44,000	■13,000	■31,000	Partially Paid
-2026	TEPL/2026/10/207	Helix Pharma Systems	Pharmaceuticals	System Integration & Deployment	Services	Vikram Joshi	■351,000	■63,000	■414,000	■414,000	■0	Paid
-2026	TEPL/2026/10/216	Orchid Research Institute	Education	Business Laptops & Workstations	Hardware	Amit Patel	■135,000	■24,000	■159,000	■0	■159,000	Outstanding
-2026	TEPL/2026/10/227	Helix Pharma Systems	Pharmaceuticals	Firewall & Network Security	Security	Riya Shah	■205,000	■37,000	■242,000	■0	■242,000	Outstanding
-2026	TEPL/2026/10/228	Orchid Research Institute	Education	Business Laptops & Workstations	Hardware	Riya Shah	■83,000	■15,000	■98,000	■98,000	■0	Paid
-2026	TEPL/2026/10/208	Jupiter Retail Ventures	Retail	Microsoft 365 & Software Licences	Software	Riya Shah	■39,000	■7,000	■46,000	■46,000	■0	Paid
-2026	TEPL/2026/10/211	Northstar Packaging	Manufacturing	Backup & Data Protection	Software	Amit Patel	■161,000	■29,000	■190,000	■190,000	■0	Paid
-2026	TEPL/2026/10/229	Kavya Textiles	Textiles	IT Infrastructure AMC	Services	Vikram Joshi	■223,000	■40,000	■263,000	■0	■263,000	Outstanding
-2026	TEPL/2026/10/204	Northstar Packaging	Manufacturing	Microsoft 365 & Software Licences	Software	Karan Mehta	■110,000	■20,000	■130,000	■130,000	■0	Paid
-2026	TEPL/2026/10/205	Meridian Public Services	Government	Business Laptops & Workstations	Hardware	Riya Shah	■100,000	■18,000	■117,000	■117,000	■0	Paid

Definitions & Copilot analysis guide

Use this page to ensure both months are compared on a like-for-like basis.

Metric	Definition used in this report
Gross Sales	Value before discounts and GST.
Discount	Commercial discount deducted from gross sales.
Taxable Value	Gross Sales minus Discount; excludes GST.
GST	Illustrative GST calculated at 18% of taxable value.
Invoice Total	Taxable Value plus GST.
Collected	Amount received against the invoice as of the report cut-off.
Outstanding	Invoice Total minus Collected; includes unpaid/part-paid amounts.
Average Invoice Value	Invoice Total divided by number of invoices.

Suggested Microsoft 365 Copilot prompt

I have uploaded the September 2026 and October 2026 sales reports for a training exercise. Compare the two months using the same definitions. Prepare an executive summary and a table showing September, October, absolute change and percentage change for Gross Sales, Discount, Taxable Value, GST, Invoice Total, Collected, Outstanding, Invoice Count and Average Invoice Value. Then analyse sales by product category, customer, industry and sales representative. Identify the top 5 customers, fastest-growing category, changes in collection efficiency, and any unusual patterns. Clearly distinguish facts calculated from the reports from recommendations. Use Invoice Total for billed sales comparisons and Taxable Value for revenue excluding GST. Do not treat this illustrative data as actual company financials.

Important: This is synthetic sample data created solely for demonstration and Copilot training. It is not sourced from Tech Elecon's accounting system, invoices, customers or actual performance. Customer names, transactions, amounts and employee names are fictional.