SEPTEMBER 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
28	■3,833,000	■141,840	■3,691,160	■664,408	■4,355,568	■2,799,843	■1,555,725

Sales mix by product category

	Invoice Value	Share
g	■1,066,602	24.5%
	■1,007,295	23.1%
	■824,760	18.9%
	■750,952	17.2%
	■705,959	16.2%

Sales Representative	Invoice Value
Karan Mehta	■1,189,027
Neha Desai	■1,181,841
Amit Patel	■854,591
Riya Shah	■684,860
Vikram Joshi	■445,249

Customer	Invoice Value
Kavya Textiles	■78
BluePeak Hospitals	■56
Orchid Research Institute	■52
Greenfield Chemicals	■39
Dharma Education Group	■35

Transaction register

	Invoice No.	Customer	Industry	Product / Service	Category	Sales Rep	Taxable Value	GST	Invoice Total	Collected	Balance	Status
-2026	TEPL/2026/09/109	Helix Pharma Systems	Pharmaceuticals	Network Switches & Routers	Networking	Karan Mehta	■170,000	■30,600	■200,600	■200,600	■0	Paid
-2026	TEPL/2026/09/126	Dharma Education Group	Education	IT Infrastructure AMC	Services	Amit Patel	■81,840	■14,731	■96,571	■0	■96,571	Outstanding
-2026	TEPL/2026/09/112	Crestline Engineering	Manufacturing	Microsoft 365 & Software Licences	Software	Neha Desai	■24,000	■4,320	■28,320	■28,320	■0	Paid
-2026	TEPL/2026/09/127	Greenfield Chemicals	Manufacturing	Firewall & Network Security	Security	Neha Desai	■334,400	■60,192	■394,592	■0	■394,592	Outstanding
-2026	TEPL/2026/09/115	Dharma Education Group	Education	Microsoft 365 & Software Licences	Software	Amit Patel	■53,010	■9,542	■62,552	■19,000	■43,552	Partially Paid
-2026	TEPL/2026/09/104	Evergreen Foods Pvt Ltd	FMCG	Network Switches & Routers	Networking	Riya Shah	■136,770	■24,619	■161,389	■161,389	■0	Paid
-2026	TEPL/2026/09/105	BluePeak Hospitals	Healthcare	Microsoft 365 & Software Licences	Software	Riya Shah	■72,540	■13,057	■85,597	■85,597	■0	Paid
-2026	TEPL/2026/09/111	Indigo Logistics Network	Logistics	Business Laptops & Workstations	Hardware	Karan Mehta	■134,900	■24,282	■159,182	■0	■159,182	Outstanding

	Invoice No.	Customer	Industry	Product / Service	Category	Sales Rep	Taxable Value	GST	Invoice Total	Collected	Balance	Status
-2026	TEPL/2026/09/118	Futura Finance Services	Financial Services	Microsoft 365 & Software Licences	Software	Amit Patel	■49,290	■8,872	■58,162	■0	■58,162	Outstanding
-2026	TEPL/2026/09/123	Northstar Packaging	Manufacturing	IT Infrastructure AMC	Services	Karan Mehta	■125,000	■22,500	■147,500	■147,500	■0	Paid
-2026	TEPL/2026/09/114	Kavya Textiles	Textiles	IT Infrastructure AMC	Services	Riya Shah	■100,880	■18,158	■119,038	■119,038	■0	Paid
-2026	TEPL/2026/09/125	Orchid Research Institute	Education	Business Laptops & Workstations	Hardware	Amit Patel	■78,850	■14,193	■93,043	■93,043	■0	Paid
-2026	TEPL/2026/09/102	BluePeak Hospitals	Healthcare	Microsoft 365 & Software Licences	Software	Vikram Joshi	■22,000	■3,960	■25,960	■25,960	■0	Paid
-2026	TEPL/2026/09/119	Meridian Public Services	Government	Backup & Data Protection	Software	Neha Desai	■138,710	■24,968	■163,678	■163,678	■0	Paid
-2026	TEPL/2026/09/120	Kavya Textiles	Textiles	Business Laptops & Workstations	Hardware	Amit Patel	■63,240	■11,383	■74,623	■74,623	■0	Paid
-2026	TEPL/2026/09/122	Pinnacle Engineering Works	Engineering	Network Switches & Routers	Networking	Vikram Joshi	■131,130	■23,603	■154,733	■154,733	■0	Paid
-2026	TEPL/2026/09/110	Kavya Textiles	Textiles	Enterprise Servers & Storage	Hardware	Neha Desai	■504,450	■90,801	■595,251	■595,251	■0	Paid
-2026	TEPL/2026/09/106	Lotus Energy Projects	Energy	IT Infrastructure AMC	Services	Amit Patel	■221,480	■39,866	■261,346	■78,000	■183,346	Partially Paid
-2026	TEPL/2026/09/101	Aarav Auto Components	Manufacturing	Microsoft 365 & Software Licences	Software	Riya Shah	■52,920	■9,526	■62,446	■62,446	■0	Paid
-2026	TEPL/2026/09/108	Indigo Logistics Network	Logistics	Network Switches & Routers	Networking	Amit Patel	■96,720	■17,410	■114,130	■80,000	■34,130	Partially Paid
-2026	TEPL/2026/09/124	BluePeak Hospitals	Healthcare	Firewall & Network Security	Security	Karan Mehta	■302,000	■54,360	■356,360	■356,360	■0	Paid
-2026	TEPL/2026/09/103	Northstar Packaging	Manufacturing	Backup & Data Protection	Software	Amit Patel	■79,800	■14,364	■94,164	■28,000	■66,164	Partially Paid
-2026	TEPL/2026/09/117	Crestline Engineering	Manufacturing	Business Laptops & Workstations	Hardware	Vikram Joshi	■72,200	■12,996	■85,196	■0	■85,196	Outstanding
-2026	TEPL/2026/09/128	Orchid Research Institute	Education	Network Switches & Routers	Networking	Vikram Joshi	■152,000	■27,360	■179,360	■126,000	■53,360	Partially Paid
-2026	TEPL/2026/09/107	Dharma Education Group	Education	IT Infrastructure AMC	Services	Karan Mehta	■169,750	■30,555	■200,305	■200,305	■0	Paid
-2026	TEPL/2026/09/116	Pinnacle Engineering Works	Engineering	Microsoft 365 & Software Licences	Software	Karan Mehta	■21,000	■3,780	■24,780	■0	■24,780	Outstanding
-2026	TEPL/2026/09/113	Orchid Research Institute	Education	Network Switches & Routers	Networking	Riya Shah	■217,280	■39,110	■256,390	■0	■256,390	Outstanding
-2026	TEPL/2026/09/121	BluePeak Hospitals	Healthcare	Backup & Data Protection	Software	Karan Mehta	■85,000	■15,300	■100,300	■0	■100,300	Outstanding

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.