IMPORTING SALESMAN BUDGETS

FROM EXCELL SPREADSHEET

1. First build your salesman budgets using the sample format below and attached to email. Fill across for each saleman and for every period through 12.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Salesman | Customer | Category | Period 1 $ | Period 1 MSF | Period 1 Tons | Period 2 $ | Period 2 MSF | Period 2 Tons |
| HOU | ABC1000 | CCOMB | 1000 | 1001 | 1002 | 2000 | 2001 | 2002 |
| MJH | ABC1000 | CCOMB | 10000 | 1001 | 1002 | 2000 | 2001 | 2002 |
| MJH | 5BELOW | CCOMB | 111000.6 | 1001 | 1002 | 2000 | 2001 | 2002 |

1. Then go to the salesman budget folder and click the Import Budgets Button
2. Type in the year to import on the popup. Click whether you want to zero out previous budgets and pull in your excell spreadsheet. It will automatically fill in budgets for all salesman defined on spreadsheet.





