Hi,

I hope you are doing well.

We need to improve our internet sales reports and want to move from static reports to visual dashboards.

Essentially, we want to focus it on how much we have sold of what products. To which clients and how it has been over time.

Seeing as each salesperson works on different products and customers it would be beneficial to be able to filter them also.

We measure our members against budgets so I added that in a spreadsheet so we can compare our values against performance.

The budget is for 2021 and we usually look 2 years back in time when we do analysis of sales

Let me know if you need anything else!

Thanks,

Steve

Sale manager