PFI Sales Goals By Products By Salesman Report

Background

Prior to SyteLine implementation PFI had a report in an excel spreadsheet. The request was made to create a SyteLine report that can provide the same or similar content.

PRECISION	SAL	ES GOALS	2021-2022	TS BY SALESMA	N							
ROSLER	21/22 BUDGET B	BUDGET	20/21 ACT	20/21 BUDGET	19/20 ACT	18/19 ACT	17/18 ACT	16/17 ACT	15/16 ACT	14/15 ACT	14/15 BUDGET	13/
BARRY/ Matt 5,5A,32	2 0	0	50996	130000	4721	26303	10136	2635	5183	2946	20000	
Tyler/ Steve 2, 222,	0	0	4186	15000	6950	3005	30115	12851	9597	6620	15000	
Craig/ Steve 3,223	0	0	0	30000	4280	30687	80639	28483	265683	40865	100000	
Sean 3A	0	0	0	0	0	0	0	0	0	0	0	
JEFFREY 227	0	0	0	0	0	0	0	0			0	
SHOP	0		0	0	0	0	0				0	
STEVE 221 eliminate	d 0		0	0	0	0	0	0	0	0	0	
700	0		0	0	0	0	0	0	0	0	0	
STEVE 220	0		153	15000	0	40666	39636	0	3981	1161	15000	
Barry/ Matt 225	0		0									
CRAIG 6, 226	0		714	30000	0	206786	188548	0	0			
BOB WERNER 30	₫"		248376		164151	95958	5486	9231				
BARRY 32	0		47746	65000	64283	88788						
TOTAL	<u>o</u> 💆	<u>0</u>	<u>352171</u>	<u>455000</u>	244385	492193	<u>354560</u>	<u>53200</u>	284444	<u>51592</u>		
com@ .15	0	0	52826	68250	36658	73829	53184	7980	42667	7739	22500	
FINISHING EQUIPMENT	21/22 BUDGET BUD	OGET	20/21 ACT	20/21 BUDGET	19/20 ACT	18/19 ACT	17/18 ACT	16/17 ACT	15/16 ACT	14/15 ACT	14/15 BUDGET	13/14
BARRY/ Matt 5,5A,32	210000	0	43792	30000	2500	35957	37004	73002	37573	0	50000	
Tyler 2, 222	70000	0	6902	70000	0	0	282	3245	17108	57487	30000	
Craig/ Steve 3,223	40000	0	0	30000	0	3405	46907	23480.7	16258	16830	75000	
SEAN 3A	0	0	0	0	0	0	0	0	0	0	0	
JEFFREY 227	0	0	0	20000	0	0	12252	0	0	0	0	

Setup

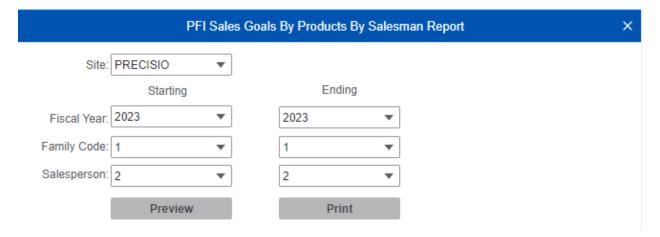
PFI uses the Family Code to help track their sales numbers. To display budget information and provide a means to compare year over year numbers in SyteLine we created a new form in SyteLine called "PFI Sales Person Family Code Budgets".

	PFI Sales Person Family Code Budgets								
	Fiscal Year	Salesperson	Family Code	Budget	Actual Override	Note			
1	2024	1	1	0.00	0.00	Example of Future Budget.			
2	2023	1	1	150,000.00	0.00	Example of this year.			
3 >	2022	1	1	140,000.00	140,000.00	Example of historic data.			
4	2021	1	1	125,000.00	126,000.00	Example of historic data.			
5	2020	1	1	100,000.00	80,000.00	Example of historic data.			
6	2019	1	1	90,000.00	100,000.00	Example of historic data.			

The budget is loaded for all years wished to be reported on. The Actual Override was only used for past years prior to SyteLine implementation. If an actual override is used the report will display the actual override instead of the actual sales in the system.

New Report

The new report is named "PFI Sales Goals By Products By Salesman Report". This was taken from the title on the source excel sheet. It is a DataView style report. Not a form report.



Parameters

The currently logged into Site will default into the form. The current year will also default into the form. Keep in mind PFI's fiscal year is not January to December. So, the fiscal year and current year will not always be the same. Family Code and Salesperson are ranges. They operate in the Standard SyteLine methodology. Leaving off one of the ranges will make it an open ended range.

Example: If you wanted all family codes greater than 3 you would enter 4 in the starting and leave the ending blank.

Preview

After filling in parameters you can click the Preview button. This will open a DataView results form filtered appropriately. These dataviews operate the same as all other dataviews in the system. You can change the layouts, have multiple layouts, and have layouts specific to user. You can export this directly to excel or PDF as well.



Print

If you would rather print the report then it will follow the standard SyteLine report options setup. Creating a document of a predefined file type. Currently you have it setup to create a PDF in report output files with auto launch turned on.

PFI Sales Goals By Products By Salesman Report-Default Fiscal Year: 2023 Family Code: 1 Salesperson: 2 Fiscal Year Family Code Family Code Desc Salesperson Sales Person Desc 2023 1 TUMBLING 2 BREHM, TYLER Actual Budget 1,356.48 0.00 Group Summaries Salesperson: 2 Total: 1,356.48 Group Summaries Family Code: 1 Total: 1,356.48 Group Summaries Fiscal Year: 2023 Total: 1,356.48 **Grand Summaries** Total: 1,356.48 Precision Finishing, Inc Page 1 of 1 PRECISIO JHorstConsultant@gmail.com