

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 SALES GOALS BY PRODUCTS BY SALESMAN 2021-2022													
ROSLE	21/22 BUDGET	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	13/14 ACT	13/14 BUDGET
BARRY/ Matt 5,5A,32	0	0	50996	130000	4721	26303	10136	2635	5183	2946	20000	0	0
Tyler/ Steve 2, 222	0	0	4186	15000	6950	3005	30115	12851	9597	6620	15000	0	0
Craig/ Steve 3,223	0	0	0	30000	4280	30687	80639	28483	265683	40865	100000	0	0
Sean 3A	0	0	0	0	0	0	0	0	0	0	0	0	0
JEFFREY 227	0	0	0	0	0	0	0	0	0	0	0	0	0
SHOP	0	0	0	0	0	0	0	0	0	0	0	0	0
STEVE 221 eliminated	0	0	0	0	0	0	0	0	0	0	0	0	0
STEVE 220	0	0	153	15000	0	40666	39636	0	3981	1161	15000	0	0
Barry/ Matt 225	0	0	0	0	0	0	0	0	0	0	0	0	0
CRAIG 6, 226	0	0	714	30000	0	206786	188548	0	0	0	0	0	0
BOB WERNER 30	0	0	248376	170000	164151	95958	5486	9231	0	0	0	0	0
BARRY 32	0	0	47746	65000	64283	88788	0	0	0	0	0	0	0
TOTAL	0	0	352171	455000	244385	492193	354560	53200	284444	51592	150000	0	0
com@ .15	0	0	52826	68250	36658	73829	53184	7980	42667	7739	22500	0	0
FINISHING EQUIPMENT	21/22 BUDGET	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	13/14 ACT	13/14 BUDGET
BARRY/ Matt 5,5A,32	210000	0	43792	30000	2500	35957	37004	73002	37573	0	50000	0	0
Tyler 2, 222	70000	0	6902	70000	0	0	282	3245	17108	57487	30000	0	0
Craig/ Steve 3,223	40000	0	0	30000	0	3405	46907	23480.7	16258	16830	75000	0	0
SEAN 3A	0	0	0	0	0	0	0	0	0	0	0	0	0
JEFFREY 227	0	0	0	20000	0	0	12252	0	0	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.

PFI Sales Goals By Products By Salesman Report ✕

Site: PRECISIO ▼

Starting Ending

Fiscal Year: 2023 ▼

Family Code: 1 ▼

Salesperson: 2 ▼

2023 ▼

1 ▼

2 ▼

Preview

Print

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.

DataView Results ✕								
Drag a column here or select columns to Group By								
Fiscal Year ▼ Family Code ▲ Salesperson ▲								
	Fiscal Year	Family Code	Family Code Desc	Salesperson	Sales Person Desc	Actual	Budget	
—	Fiscal Year: 2,023 (1)							
—	Family Code: 1 (1)							
—	Salesperson: 2 (1)							
	2,023	1	TUMBLING	2	BREHM, TYLER	1,356.48	0.00	
						Total = 1,356.48		
						Total = 1,356.48		
						Total = 1,356.48		

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



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Fiscal Year: 2023

Family Code: 1

Salesperson: 2

	Fiscal Year	Family Code	Family Code Desc	Salesperson	Sales Person Desc	Actual	Budget
	2023	1	TUMBLING	2	BREHM, TYLER	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	