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.

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# 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”.   
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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.

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## 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.

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## 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.

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