

What you have	What you want	Option
Excel file* with Sales & Commission	Reports when all info is available, least expense on managing payroll/reporting/S&C	1
	Immedaite sales reports, less concerned with time to manage S&C	2
PDF** with Sales & Commission	If it can be converted with Adobe Acrobat and you want reports with line-item details	1
	If it can not be converted and you want line-item details	4
	If it can not be converted and you don't need line-item details, just invoice summary	6
Paper Statement with S&C	If it can be scanned to a PDF and converted with Adobe Acrobat and you want reports with line-item details	1
	If it can not be scanned or converted and you want line-item details	4
	If it can not be scanned or converted and you don't need line-item details, just invoice summary	6
Excel File Sales Only	For sales-only reports	3
	For reconciliation later with invoices to be edited	2
Excel File Commissions Only	If it has customer name and invoice number, it can be matched to invoices so you have reconciled reports	2
	Commission-only reports, not tied to sales	2
PDF with Sales Only	If it can be converted with Adobe Acrobat and you want sales reports with line-item details	1
	If it can not be converted and you want line-item details	4
	If it can not be converted and you don't need line-item details, just invoice summary	7
PDF with Commission Only	If it can be converted with Adobe Acrobat and you want the commission to reconcile with invoices generated previously	2
	If it can not be converted and you want you want the commission to reconcile with invoices generated previously	4 or 5
	If it can not be converted and you don't need line-item details, just commssion summary	8
Paper Statement, Sales Only	If it can be scanned then converted with Adobe Acrobat and you want sales reports with line-item details	1
	If it can not be scanned then converted and you want line-item details	4
	If it can not be scanned then converted and you don't need line-item details, just invoice summary	7
Paper Statement, Commissions Only	If it can be scanned then converted with Adobe Acrobat and you want the commission to reconcile with invoices generated previously	2
	If it can not be scanned then converted and you want you want the commission to reconcile with invoices generated previously	4 or 5
	If it can not be scanned then converted and you don't need line-item details, just commssion summary	8
Purchase Orders Only	You want to show pending sales, then generate invoices, then reconcile	4 or 5
Bookings Only	If you only want to see them on the forecast, import as bookings only. If you want them to post as open invoices, post them to sales only	2

*Minimum data required for import includes customer name, sales amount, invoice date, commission amount.

** Depending on quality of PDF this could be converted to a spreadsheet using Adobe Acrobat or it may require manual entry