

# Reports & Exports in Repfabric

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## Commission Reports

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# Sales Reports

# Sales Reports

## Customer Details

- Line by line of each sale that can be grouped by rep, by manufacturer, by sales team
- This could be helpful to cross-reference or troubleshoot any reconciling for commissions payout or sales numbers in general.
- Has variety of sort views. Requires customer name for look up. *Will only show sales of the person logged in for any sales team they are on.*

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Customer Details: Report Filter

As of:

Month:

Customer:

Manufacturer:

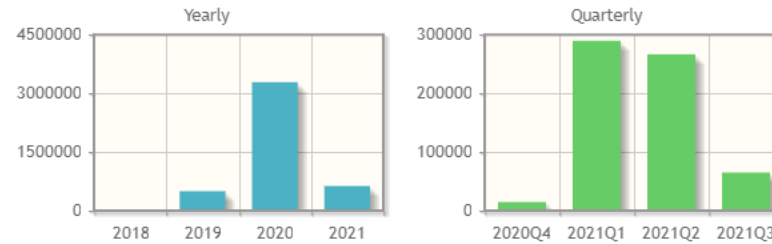
Distributor:

[View Report](#)

RepSalesForce

### Customer Details

Quarter : 2021-Q3, Month : July



Manufacturer:

Distributor:

Customer:

[Run Report](#)

### Ferguson Enterprises, Inc

Manufacturer	Previous Year	Current Year	Year RR	2020Q4	2021Q1	2021Q2	Current Qtr	Qtr RR
PBC Linear +	975,003	308,583	32.9%		143,689	132,763	75,851	57.1%
RectorSeal	893,003	308,583	35.9%		143,689	132,763	75,851	57.1%
Zoeller	78,447	1,132	1.6%	6,732	860	254	-706	-277.6%
Leviton	78,447	1,132	1.6%	6,732	860	254	-706	-277.6%
Legend	603,766							
Bel Fuse	601,459							
Sterling	24,137							
BRK	21,830							
QuantumFlow	800			226				
Signal Transformers	800			226				
<b>Total</b>	<b>3,277,693</b>	<b>619,430</b>		<b>13,916</b>	<b>289,099</b>	<b>266,035</b>	<b>150,290</b>	

- Lists by customer monthly sales summary. The only report where you can find "Summarize by Parent Company."
- Reference to totals for that customer for that month.
- Has variety of sort views. Requires customer name for look up. Will only show sales of the person logged in for any sales team they are on.

# Sales Reports

## Customer Summary – Standard Summary

**RepSalesForce**

**Customer Summary**

Quarter : 2021-Q3, Month : July

Manufacturer  🔍

Distributor  🔍

Sales Team  🔍 Clear

Customer  🔍

Minimum Sales  🔒

[View Report](#) 📄 📧

Customer Name <span style="float: right;">⇅</span>	Previous Year <span style="float: right;">⇅</span>	Current Year (Actual) <span style="float: right;">⇅</span>	% to LY <span style="float: right;">⇅</span>
<a href="#">Hajoca-Tampa S</a>	1,915,783	1,996,536	104.22%
<a href="#">Ferguson Enterprises, Inc</a>	3,277,693	619,430	18.90%
<a href="#">Weinstein Supply(Hajoca)-Bradenton</a>	3,681,514	595,377	16.17%
<a href="#">Briar Patch Tiny Tree Homes</a>		541,350	
<a href="#">Super Store</a>		144,000	
<a href="#">AIT-Casselberry</a>	56,623	126,559	223.51%
<a href="#">Tesla Austin</a>	2,273,100	107,628	4.73%
<a href="#">AIT-Destin</a>	23,856	82,679	346.57%
<a href="#">Ferguson-Coral Springs</a>	1,435,917	52,034	3.62%
<a href="#">AIT-Gainesville</a>	454,252	51,401	11.32%
<a href="#">Ace HQ</a>	43,101	39,706	92.12%
<a href="#">CBT COMPANY</a>	6,008	26,672	443.90%
<a href="#">Anixter-Jacksonville</a>		25,453	
<a href="#">All Phase Bradenton</a>		24,828	
<a href="#">Hajoca-Coral Gables</a>	2,107	19,020	902.63%
<a href="#">ABBA Construction, Inc</a>	55,455	18,903	34.09%
<a href="#">John's Lawns</a>	20,250	15,000	74.07%
<a href="#">AIT - Jacksonville</a>		12,308	
Total :	29,166,185	4,600,479	

# Sales Reports

## Customer Summary – with Direct & Credited sales

✓ This version adds columns for “Direct Sales” and “Credit Sales.”

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Customer Summary : Report Filter

As of: 2021  
 July

Manufacturer: All  
 Distributor: All  
 Sales Team: [ ]  
 Customer: All  
 Company Region: [ ]

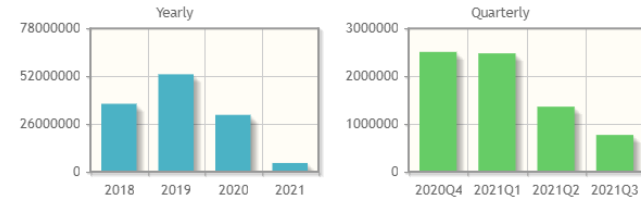
Minimum Sales: 0.00  
 Summarize by Parent Company:

Report Type:  
 Standard Summary  
 Direct and Credited Sales Amounts  
 Secondary Customer Related Company

Manufacturer: All  
 Distributor: All  
 Sales Team: [ ]  
 Customer: All  
 Minimum Sales: 0.00

[View Report](#)

**RepSalesForce**  
**Customer Summary**  
 Quarter : 2021-Q3, Month : July



Customer Name	Year - 2020	Year - 2021	% to LY	Direct Sales	Credited Sales
Hajoca-Tampa S	1,915,783	1,996,536	104.22%	1,996,535.70	
Ferguson Enterprises, Inc	3,277,693	619,430	18.90%	619,430.08	
Weinstein Supply(Hajoca)-Bradenton	3,681,514	595,377	16.17%	595,376.72	
Briar Patch Tiny Tree Homes		541,350		541,350.00	
Super Store		144,000		144,000.00	
AIT-Casselberry	56,623	126,559	223.51%	122,078.98	4480.00
Tesla Austin	2,273,100	107,628	4.73%	107,628.00	
AIT-Destin	23,856	82,679	346.57%	82,678.54	
Ferguson-Coral Springs	1,435,917	52,034	3.62%	52,034.48	
AIT-Gainesville	454,252	51,401	11.32%	51,401.13	
Ace HQ	43,101	39,706	92.12%	39,705.90	
CBT COMPANY	6,008	26,672	443.90%	26,672.00	
Anixter-Jacksonville		25,453		25,453.43	
All Phase Bradenton		24,828		24,828.48	
Hajoca-Coral Gables	2,107	19,020	902.63%	19,020.00	
ABBA Construction, Inc	55,455	18,903	34.09%	18,903.00	
John's Lawns	20,250	15,000	74.07%	15,000.00	
AIT - Jacksonville		12,308		12,307.90	
<b>Total :</b>	<b>29,166,185</b>	<b>4,600,479</b>		<b>4595628.09</b>	

# Sales Reports

## Customer Summary – with Secondary Customer Related Company

- ✓ This version adds columns for “Secondary Customer Sales” and “credit sales.”

Sales-Reports

Customer Summary : Report Filter

As of: 2021  
 July

Manufacturer: All  
 Distributor: All  
 Sales Team: [Search]  
 Customer: All  
 Company Region: [Search]

Minimum Sales: 0.00

Summarize by Parent Company:

Report Type:  Standard Summary  Secondary Customer Related Company

[View Report](#)

RepSalesForce Customer Summary Quarter : 2021-Q3, Month : July

Yearly

Quarterly

Customer Name	Year - 2020	Year - 2021	% to LY	Secondary Customer Sales	Primary+Secondary Customer
Hajoca-Tampa S	1,915,783	1,996,536	104.22%		
Ferguson Enterprises, Inc	3,277,693	619,430	18.90%		
Weinstein Supply(Hajoca)-Bradenton	3,681,514	595,377	16.17%		
Briar Patch Tiny Tree Homes		541,350			
Super Store		144,000			
AIT-Casselberry	56,623	126,559	223.51%		
Tesla Austin	2,273,100	107,628	4.73%		
AIT-Destin	23,856	82,679	346.57%		
Ferguson-Coral Springs	1,435,917	52,034	3.62%		
AIT-Gainesville	454,252	51,401	11.32%		
Ace HQ	43,101	39,706	92.12%		
CBT COMPANY	6,008	26,672	443.90%		
Anixter-Jacksonville		25,453			
All Phase Bradenton		24,828			
Hajoca-Coral Gables	2,107	19,020	902.63%		
ABBA Construction, Inc	55,455	18,903	34.09%		
John's Lawns	20,250	15,000	74.07%		
AIT - Jacksonville		12,308			
<b>Total :</b>	<b>29,166,185</b>	<b>4,600,479</b>			

- With a part number to reference, find all sales of that part# by customer or distributor.
- Ideal for tracking current sales and which distributor also buys/sells that part.
- Has variety of sort views. Show “Secondary Customer,” show by customer, distributor, or manufacturer.
- See quarterly periods with sales history or cumulative with pricing comparison.

# Sales Reports

## Product Details – Quarterly Periods w/Sales History

**Sales-Reports**

- Customer Details
- Customer Summary
- Product Details**
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

**Product Details : Report Filter**

As of: 2021  
July

Manufacturer: Acme Explosives

Distributor: All

Sales Team: All

Customer: All

Part Number:

Show Secondary Customer:

Group by:  Customer  Distributor  Manufacturer

Report Type:  Quarterly Periods with Sales History  Cumulative with Pricing Comparisons

[View Report](#)

RepSalesForce
Companies | Contacts | Jobs | Opportunities | Activity Journals | Planner | Sales by Month | Sales Comparison | Customer Summary | Email | Line Overview

**Product Detail Report**  
Quarter : 2021-Q3, Month : July

Yearly

Quarterly

Ace Supply Tampa

Manufacturer	Distributor	Part Number	Product Family	Previous Year	Current Year	Year RR	2020Q4	2021Q1	2021Q2	Current Qtr	Qtr RR
Acme Explosives	Ace Supply Tampa	11314-00019	.06" White Sill Gasket - Left		46				46		
Acme Explosives	Ace Supply Tampa			133,624							
<b>Total :</b>				133,624	46		0	0	46	0	

Ace Coral Gables

Manufacturer	Distributor	Part Number	Product Family	Previous Year	Current Year	Year RR	2020Q4	2021Q1	2021Q2	Current Qtr	Qtr RR
Acme Explosives	Ace Coral Gables	P7-900088		698							
Acme Explosives	Ace Coral Gables	P7-900089		1,395							
Acme Explosives	Ace Coral Gables				90			90			
<b>Total :</b>				2,092	90		0	90	0	0	

Ace Jacksonville

Manufacturer	Distributor	Part Number	Product Family	Previous Year	Current Year	Year RR	2020Q4	2021Q1	2021Q2	Current Qtr	Qtr RR
Acme Explosives	Ace Jacksonville			452							
<b>Total :</b>				452	0		0	0	0	0	

AIT-Casselberry



# Sales Reports

✓ This version will show a cumulative view

## Product Details – Cumulative w/Pricing Comparison

**Sales-Reports**

- Customer Details
- Customer Summary
- Product Details**
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Product Details : Report Filter

As of: 2021 July

Manufacturer: Acme Explosives

Distributor: All

Sales Team: All

Customer: All

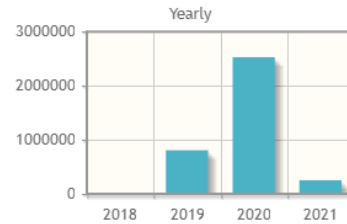
Part Number:

Show Secondary Customer:

Group by:  Customer  Distributor  Manufacturer

Report Type:  Quarterly Periods with Sales History  Cumulative with Pricing Comparisons

**RepSalesForce**  
**Product Detail Report**  
 As of : 2021 - July



Manufacturer: Acme Explosives

Distributor: All

Sales Team: All

Customer: All

Part Number:

**Run Report** **Export**

Acme Explosives								
Distributor ↑↓	Customer ↑↓	Part No. ↑↓	Product Family ↑↓	Cumulative ↑↓	Previous Year ↑↓	Current Year ↑↓	Year RR ↑↓	
	Detailed Development Solutions DDS					1,200		
	Creative Technologies					32,582		
	33 West Monroe Associates LLC					28,131		
	AFCO Performance Group, LLC					9,454		
AIT-Casselberry	AIT-Casselberry					12,889		
Johnstone Supply-Tampa	Johnstone Supply-Tampa					980		
BC Industrial Supply, Inc-Clermont	BC Industrial Supply, Inc-Clermont					9,100		
Ace Jacksonville	Ace Jacksonville					452		
Ace Supply Tampa	Ace Supply Tampa					133,624		
Ace HQ	Ace HQ	XL - 1222	150W MedUS 36V			1,440		
	Lockmasters					70,422		
	Montaplast of North America					408		
Kirby - Muscle Shoals	Kirby - Muscle Shoals					251		
	Fillauer, Inc.					11,492		
AIT-Tampa-HQ	AIT-Tampa-HQ					876		
Ace HQ	Ace HQ	XL - 1223				500		
	A.C.M.E. Incorporated					1,200		
HAHN AUTOMOTIVE (GOLDSBORO)	HAHN AUTOMOTIVE (GOLDSBORO)					500		
Ace Supply Tampa	33 West Monroe Associates LLC					125,000		
Ace HO	Ace HO					12,456	990	8.1%

- Multiple views for comparing history, pricing and customers who purchased that part.
- To identify gaps in frequency, price fluctuations, or missed opportunities with distributors and increase sales through corrections in those areas.
- Has variety of sort views.

# Sales Reports

## Product Sales History

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History**
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Products Sales History : Report Filter

As of: 2021

July

Part Number: [Search]

Manufacturer: All [Search]

Distributor: All [Search]

Sales Team: All [Search]

Customer: All [Search]

From Year: 2021

[View Report](#)

Companies Contacts Jobs Opportunities Activity Journals Planner Sales by Month Sales Comparison Customer Summary Email Line Overview

**RepSalesForce**  
**Product Sales History**  
 January 2021 - July 2021

Manufacturer: All [Search]

Distributor: All [Search]

Sales Team: All [Search]

Customer: All [Search]

[Run Report](#)

Manufacturer	Distributor	Customer	Sales Team	Secondary Customer	Part Number	Invoice Number	Date	Total Price	Unit Price	Quantity	Product
MCM Productions		Tiny Tim's Turtles	Rodney Dangerfield	John's Lawns	fertilizer		2021-01-13	255.00	0	0.000	
JSM Manufacturing		Tiny Tim's Turtles	Rodney Dangerfield	John's Lawns	fertilizer	20201219	2021-01-13	255.00	0	0.000	
Zurn +	BUCKEYE SALES	BUCKEYE SALES	Chris Farley		4N51C-S2DA	01042020b	2021-01-04	1080.00	1.08	1000.000	
Zurn +	BUCKEYE SALES	BUCKEYE SALES	Chris Farley		F001701171	01042020b	2021-01-04	2001.60	500.4	4.000	
Zurn +	United Refrigeration-Jacksonville	United Refrigeration-Jacksonville	Rodney Dangerfield		25TU8B-S2LA	9009201	2021-01-05	3850.00	0.77	5000.000	
Zurn +	United Refrigeration-Jacksonville	United Refrigeration-Jacksonville	Rodney Dangerfield		25TU8B-S2LA	9009982	2021-01-05	3850.00	0.77	5000.000	
Acme Explosives		Super Store	Chris Farley		XL - 1222	Niv01082021	2021-01-08	144000.00	120	1200.000	150W Medical Gra
Acme Explosives	Graybar Tampa	Graybar Tampa	Chris Farley		11314-00020	NL011121-02	2021-01-11	1144.90	0.022898	50000.000	
Legend	All Phase Bradenton	All Phase Bradenton	Chris Farley			38938379	2021-01-12	17938.48	0	1.000	
Legend	All Phase Bradenton	All Phase Bradenton	Chris Farley			34908203	2021-01-12	6890.00	0	1.000	
Leviton		Tesla Austin	Chris Farley		0000973.02 (AFCO)	7889803	2021-01-14	16720.00	4.18	4000.000	
Bel Fuse		ABBA Construction, Inc	Chris Farley			21343	2021-01-22	8990.00	0	1.000	
BRK	AIT-Gainesville	AIT-Gainesville	Chris Farley			123143	2021-02-09	3900.00	0	1.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-09	96752.00	0	0.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-10	86793.00	0	0.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-08	45421.00	0	0.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-05	46329.00	0	0.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-06	66791.00	0	0.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-07	20672.00	0	0.000	
Hundred Acre Wood Lumber		Briar Patch Tiny Tree Homes	Winston Poohe				2021-01-04	1632.00	0	0.000	

- Chart of all sales by month by manufacturer or by Customer.
- Check annual progress in a month-by-month view.
- These numbers are based on the invoice dates that fall in the range of the month referenced.
- Show by manufacturer or customer.

# Sales Reports

## Sales by Month

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month**
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Sales by Month : Report Filter

Sales Year:

Sales Team:

Company Region:

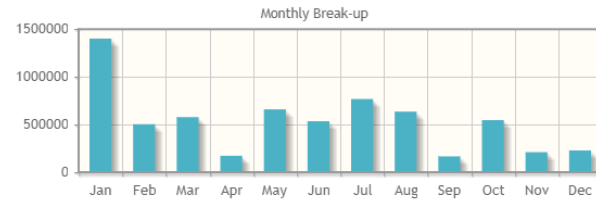
Group By:  Manufacturer  Customer

[View Report](#)

RepSalesForce

Sales by Month

As of : 2021



**Group By**

Manufacturer  Customer

**Sales Year**

2021

**Sales Team**

[Run Report](#)

Manufacturer	Jan ↑↓	Feb ↑↓	Mar ↑↓	Apr ↑↓	May ↑↓	Jun ↑↓	Jul ↑↓	Aug ↑↓	Sep ↑↓	Oct ↑↓	Nov ↑↓	Dec ↑↓	Total ↑↓	% ↑↓
ABB	13,679	6,810	-427	910	3,404	-3,236	61	0	0	57	0	0	21,257	0.3%
Acme Explosives	151,635	1,490	90,908	46	738	0	0	0	0	0	11,166	22,275	278,258	4.4%
Acme Fireworks	36,255	0	0	0	0	0	0	0	0	0	0	0	36,255	0.6%
Bel Fuse	8,990	38,781	0	1,200	0	96,685	0	0	0	0	0	0	145,656	2.3%
BRK	0	3,900	0	0	0	26,017	0	93,572	0	0	0	0	123,490	1.9%
DCM Confections	24,141	52,831	0	0	174,574	0	175,411	67,206	0	45,496	60,508	9,648	609,816	9.6%
Eaton	0	0	0	1,000	0	0	0	37	460	0	123	416	2,036	0.0%
HANSGRÖHE	0	28,560	0	0	0	0	0	0	0	0	0	0	28,560	0.4%
Hundred Acre Wood Lumber	541,350	0	0	0	0	0	0	0	0	0	0	0	541,350	8.5%
JSM Manufacturing	255	2,534	0	5,000	2,586	19,291	3,142	0	0	0	0	0	32,808	0.5%
Landscape Forms	0	0	-427	128	0	-3,236	61	0	599	57	428	5,155	2,764	0.0%
Legend	110,793	76,560	201,444	14,025	33,724	69,692	136,911	68,372	0	39,749	0	29,031	780,301	12.3%
Legrand	17,059	0	0	0	0	0	0	0	0	0	0	0	17,059	0.3%
Leviton	16,951	2,346	513	0	0	254	17	161	-883	-1,042	0	20	18,336	0.3%
MCM Productions	255	0	0	10,000	0	0	1,500	0	0	0	0	0	11,755	0.2%
Mersen	0	0	0	0	0	0	0	37	460	0	123	416	1,036	0.0%
On Semi	0	0	0	0	0	0	0	0	599	0	428	5,155	6,181	0.1%
PBC Linear +	40,881	90,052	40,785	43,430	57,018	32,315	32,131	35,016	8,703	20,500	0	3,744	404,576	6.4%
QuantumFlow	112,844	0	0	12,254	54,542	82,772	35,276	51,773	72,458	166,756	31,073	42,164	661,913	10.4%
RectorSeal	40,881	62,023	40,785	43,430	57,018	32,315	32,131	35,016	8,703	20,500	0	3,744	376,547	5.9%
Signal Transformers	112,844	0	0	12,254	54,542	82,772	35,276	51,773	72,458	166,756	31,073	42,164	661,913	10.4%
Sterling	69,714	124,906	199,310	14,025	208,298	95,709	312,322	229,150	0	85,245	60,508	38,679	1,437,868	22.6%
Zeller	231	117	513	0	0	254	17	161	-883	-1,042	0	20	-613	0.0%
<b>Total :</b>	<b>1,398,538</b>	<b>500,119</b>	<b>574,283</b>	<b>168,656</b>	<b>656,072</b>	<b>531,606</b>	<b>764,257</b>	<b>632,274</b>	<b>162,675</b>	<b>543,034</b>	<b>206,597</b>	<b>224,906</b>	<b>6,363,016</b>	<b>100%</b>

[Need Help?](#)

- Compares month and YTD to previous year numbers.
- See gains in dollars and percent for comparative time frames.
- Can be run for last year or previous 12 months and be shown by manufacturer, customer, distributor or sales team.

# Sales Reports

## Sales Comparison

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month
- Sales Comparison**
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Sales Comparison : Report Filter

As of July 2021

Group By

Manufacturer

Customer

Distributor

Sales Team

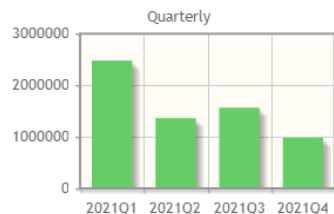
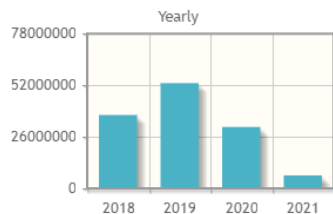
Report for

Selected Year

Previous 12 months

[View Report](#)

**RepSalesForce**  
**Sales Comparison Report**  
 As of :2021 - December



Group By

Manufacturer

Customer

Distributor

Sales Team

Month December

Year 2021

[Run Report](#)

Manufacturer	Dec 2021 ↑↓	Dec 2020 ↑↓	Jan-Dec 2021 ↑↓	Jan-Dec 2020 ↑↓	Jan-Dec 2020 ↑↓	YTD Var \$ ↑↓	Var % ↑↓	YTD % ↑↓	LYT % ↑↓
ST Micro	0	0	0	18,188	18,188	-18,188	-100	0	0.06
Acme Fireworks	0	0	36,255	0	0	36,255	100	0.57	0
Lorenz	0	0	0	96,113	96,113	-96,113	-100	0	0.31
Uponor	0	0	0	32,371	32,371	-32,371	-100	0	0.11
Signal Transformers	42,164	0	661,913	1,704,920	1,704,920	-1,043,007	-61.18	10.4	5.54
Acme Explosives	22,275	0	278,258	2,522,926	2,522,926	-2,244,668	-88.97	4.37	8.19
Eaton	416	0	2,036	363,006	363,006	-360,970	-99.44	0.03	1.18
JSM Manufacturing	0	12,880	32,808	142,580	142,580	-109,772	-76.99	0.52	0.46
ABB	0	1,071,421	21,257	1,597,625	1,597,625	-1,576,368	-98.67	0.33	5.19
MCM Productions	0	12,530	11,755	111,358	111,358	-99,603	-89.44	0.18	0.36
Zoeller	20	0	-613	495,232	495,232	-495,845	-100.12	-0.01	1.61
BRK	0	21,574	123,490	682,696	682,696	-559,206	-81.91	1.94	2.22
Bel Fuse	0	12,340	145,656	991,960	991,960	-846,304	-85.32	2.29	3.22
HANSGROHE	0	0	28,560	130,829	130,829	-102,269	-78.17	0.45	0.42
DCM Confections	9,648	5,805	609,816	310,713	310,713	299,103	96.26	9.58	1.01
Hundred Acre Wood Lumber	0	0	541,350	0	0	541,350	100	8.51	0
Zurn +	22,275	0	163,893	6,179,277	6,179,277	-6,015,384	-97.35	2.58	20.07
Mersen	416	0	1,036	268,968	268,968	-267,932	-99.61	0.02	0.87
Sterling	38,679	0	1,437,868	1,729,649	1,729,649	-291,780	-16.87	22.6	5.62
Legend	29,031	24,366	780,301	3,116,653	3,116,653	-2,336,352	-74.96	12.26	10.12
Landscape Forms	5,155	0	2,764	1,324,761	1,324,761	-1,321,997	-99.79	0.04	4.3

- Shows sales amount credited to primary and secondary customer sales rep teams.
- To confirm if designers/builder 70/30 splits, part number splits took hold and credited a portion to the secondary customer account.
- There are three places to set the split – application settings, in aliasing when the relationship is assigned for "commission split" and through part number exceptions.

# Sales Reports

## Credited Sales Summary

Sales-Reports

Customer Details  
Customer Summary  
Product Details  
Product Sales History  
Sales by Month  
Sales Comparison  
Credited Sales Summary  
Manufacturer Page  
Line Overview  
Plan Vs Actual  
Sales Analytical Summary  
Manufacturer Summary

Credited Sales Summary : Report Filter

As of: 2021  
July

Manufacturer: Acme Explosives  
Distributor: All  
Sales Team: All  
Customer: All

[View Report](#)

RepSalesForce From: January 2021 To: July 2021

Credited Sales Summary

Manufacturer: Acme Explosives  
Distributor: All  
Sales Team: All  
Customer: All

[View Report](#)

Ace HQ									
Manufacturer	Distributor	Primary Sales Team	Secondary Customer	Secondary Customer Sales Team		Direct Sales	Credited Sales	Total sales	
Acme Explosives	Ace HQ	Chris Farley				990.00	0.00	990.00	
Total :						990.00	0.00	990.00	
Ace Coral Gables									
Acme Explosives	Ace Coral Gables	Barney Rubble				89.68	0.00	89.68	
Total :						89.68	0.00	89.68	
Ace Supply Tampa									
Acme Explosives	Ace Supply Tampa	Chris Farley	Tesla	Chris Farley		32.06	13.74	45.80	
Total :						32.06	13.74	45.80	
AIT-Casselberry									
Acme Explosives	AIT-Casselberry	Rodney Dangerfield	33 West Monroe Associates LLC	Chris Farley		1920.00	4480.00	6400.00	
Total :						1,920.00	4,480.00	6,400.00	
Buckeye - Memphis									
Acme Explosives	Buckeye - Memphis	1 TEST Bill Murray				738.02	0.00	738.02	
Total :						738.02	0.00	738.02	
Graybar Tampa									
Acme Explosives	Graybar Tampa	Chris Farley				1144.90	0.00	1144.90	
Total :						1,144.90	0.00	1,144.90	

- Shows color coded for actual vs. goals followed by top 10 customers and top distributors.
- Summary of overall account to review and create action plans to reach goals.
- To change the order of the Top 10 customers from highest current annual sales to alphabetical, click blue arrows in column header.

# Sales Reports

## Manufacturer Page

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

Manufacturer Page : Report Filter

As of 2021 July

Manufacturer Acme Explosives Q

View Report

**RepSalesForce**  
**Credited Sales Summary**

From: January 2021  
To: July 2021

Manufacturer All Q

Distributor All Q

Sales Team All Q

Customer All Q

View Report

**33 West Monroe Associates LLC**

Manufacturer <span style="float: right;">⇅</span>	Distributor <span style="float: right;">⇅</span>	Primary Sales Team <span style="float: right;">⇅</span>	Secondary Customer <span style="float: right;">⇅</span>	Secondary Customer Sales Team <span style="float: right;">⇅</span>	Direct Sales <span style="float: right;">⇅</span>	Credited Sales <span style="float: right;">⇅</span>	Total sales <span style="float: right;">⇅</span>
Bel Fuse		Chris Farley			5700.00	0.00	5700.00
<b>Total :</b>					<b>5,700.00</b>	<b>0.00</b>	<b>5,700.00</b>

**A.C.M.E. Incorporated**

Manufacturer <span style="float: right;">⇅</span>	Distributor <span style="float: right;">⇅</span>	Primary Sales Team <span style="float: right;">⇅</span>	Secondary Customer <span style="float: right;">⇅</span>	Secondary Customer Sales Team <span style="float: right;">⇅</span>	Direct Sales <span style="float: right;">⇅</span>	Credited Sales <span style="float: right;">⇅</span>	Total sales <span style="float: right;">⇅</span>
JSM Manufacturing		Chris Farley			500.00	0.00	500.00
<b>Total :</b>					<b>500.00</b>	<b>0.00</b>	<b>500.00</b>

**ABBA Construction, Inc**

Manufacturer <span style="float: right;">⇅</span>	Distributor <span style="float: right;">⇅</span>	Primary Sales Team <span style="float: right;">⇅</span>	Secondary Customer <span style="float: right;">⇅</span>	Secondary Customer Sales Team <span style="float: right;">⇅</span>	Direct Sales <span style="float: right;">⇅</span>	Credited Sales <span style="float: right;">⇅</span>	Total sales <span style="float: right;">⇅</span>
Bel Fuse		Chris Farley			8990.00	0.00	8990.00
Leviton		Chris Farley			904.00	0.00	904.00
PBC Linear +		Chris Farley			9009.00	0.00	9009.00
<b>Total :</b>					<b>18,903.00</b>	<b>0.00</b>	<b>18,903.00</b>

**Ace HQ**

Manufacturer <span style="float: right;">⇅</span>	Distributor <span style="float: right;">⇅</span>	Primary Sales Team <span style="float: right;">⇅</span>	Secondary Customer <span style="float: right;">⇅</span>	Secondary Customer Sales Team <span style="float: right;">⇅</span>	Direct Sales <span style="float: right;">⇅</span>	Credited Sales <span style="float: right;">⇅</span>	Total sales <span style="float: right;">⇅</span>
Acme Explosives	Ace HQ	Chris Farley			990.00	0.00	990.00
Bel Fuse	Ace HQ	Chris Farley			28781.90	0.00	28781.90
Zurn +	Ace HQ	Chris Farley			9934.00	0.00	9934.00
<b>Total :</b>					<b>39,705.90</b>	<b>0.00</b>	<b>39,705.90</b>

# Sales Reports

## Line Overview

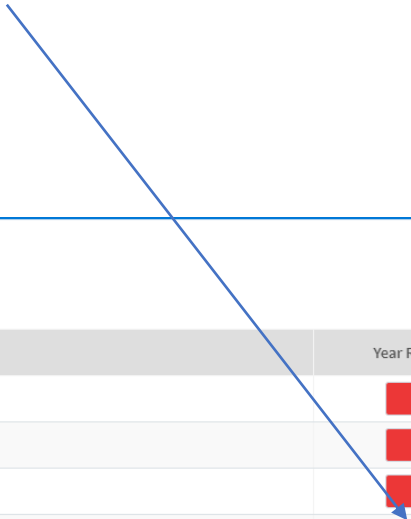
- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Report
- Manufacturer Page
- Line Overview**
- Plan Vs Actual
- Sales Analytical Summary
- Manufacturer Summary

- Color Key on health of sales. Lists sales in order of highest current annual sales first.
- Easy to use to run a sales meeting for high-level overview without revealing actual company revenue values.
- **Click to dive deeper on colored square or blue word.** The click through on a company name presents the Manufacturer Page report.

RepSalesForce  
Sales Line Overview  
As of: 2021

Year: 2021  
Month: July

Manufacturer	Year Runrate	Quarter Runrate	Funnel	NBO's	Year Forecast	Last Entry
Sterling	Red	Green	White	White	White	12-26-2021
Legend	Red	Green	White	White	White	12-26-2021
QuantumFlow	Red	Green	White	White	Red	12-14-2021
Signal Transformers	Red	Green	White	White	Red	12-14-2021
DCM Confections	Green	Green	White	White	White	12-13-2021
Hundred Acre Wood Lumber	Green	White	White	White	White	01-10-2021
PBC Linear +	Red	Red	Red	White	White	12-17-2021
RectorSeal	Red	Red	White	White	White	12-17-2021
Acme Explosives	Red	White	White	White	Red	12-26-2021
Zurn +	Red	White	White	Red	White	12-26-2021
Bel Fuse	Red	White	White	White	Red	06-30-2021
BRK	Red	Green	White	White	Red	08-30-2021
Acme Fireworks	Green	White	White	White	White	01-01-2021
JSM Manufacturing	Red	Red	White	White	White	03-14-2022
HANSGROHE	Green	White	White	White	White	02-28-2021
ABB	Red	Red	White	White	White	10-22-2021













- Color Key on health of sales. Lists sales in order of highest current annual sales first.
- Easy to use to run a sales meeting for high-level overview without revealing actual company revenue values.
- View by Manufacturer or Customer.

# Sales Reports

## Sales Analytical Summary

Sales-Reports

- Customer Details
- Customer Summary
- Product Details
- Product Sales History
- Sales by Month
- Sales Comparison
- Credited Sales Summary
- Manufacturer Page
- Line Overview
- Plan Vs Actual
- Sales Analytical Summary**
- Manufacturer Summary

Sales Analytical Summary : Report Filter

As of: 2021  
 July

Manufacturer: All  
 Customer: All  
 Sales Team: All  
 Parent Company: All

Group by:  Manufacturer  Customer

[View Report](#)

**RepSalesForce**

**Sales Analytical Summary (by Sales Team)**

As of: 2021

Group by:  Manufacturer  Customer

Year: 2021  
 Month: July

Manufacturer: All  
 Sales Team: All  
 Customer: All

[View Report](#) [Export](#)

**For: Chris Farley**

ABB									
Customer ↑↓	Jul 2021 ↑↓	Jul 2020 ↑↓	Jan-Jul 2021 ↑↓	Jan-Jul 2020 ↑↓	Jan-Dec 2020 ↑↓	YTD Var \$ ↑↓	Var % ↑↓	YTD % ↑↓	LYT % ↑↓
SCOTT ELECTRIC COMPANY Pittsburg	0	0	0	0	94,202	0	100	0	0.31
GEXPRO Pittsburg	0	-9,727	0	-9,727	93,507	9,727	-100	0	0.3
SCOTT ELECTRIC COMPANY Hagerstown	0	0	0	0	10,145	0	100	0	0.03
SCOTT ELECTRIC Greensburg	0	0	0	0	55,136	0	100	0	0.18
WESCO Warrendale	0	0	0	0	2,877	0	100	0	0.01
CBT COMPANY	0	0	0	0	6,008	0	100	0	0.02
CITY LIGHTING PRODUCTS COMPANY	0	0	0	0	416	0	100	0	0
WEBER ELECTRIC Ashtabula	0	0	0	0	2,479	0	100	0	0.01
AIT-Gainesville	0	0	904	0	0	904	100	0.02	0
Buccaneer Supply Tampa	61	20,503	-3,475	604,889	609,128	-608,363	-100.57	-0.08	1.98
Weinstein Supply(Hajoca)- Bradenton	0	0	0	1,414	1,414	-1,414	-100	0	0
<b>Total :</b>	<b>61</b>	<b>10,776</b>	<b>-2,571</b>	<b>596,576</b>	<b>875,312</b>	<b>-599,147</b>		<b>-0.06</b>	<b>2.84</b>

Acme Explosives									
Customer ↑↓	Jul 2021 ↑↓	Jul 2020 ↑↓	Jan-Jul 2021 ↑↓	Jan-Jul 2020 ↑↓	Jan-Dec 2020 ↑↓	YTD Var \$ ↑↓	Var % ↑↓	YTD % ↑↓	LYT % ↑↓
Kirby Risk-Brandon	0	0	0	975	975	-975	-100	0	0
Apex Tool & Fasteners, Inc.- Clearwater	0	0	0	5,835	5,835	-5,835	-100	0	0.02
Ace Supply Tampa	0	1,000	46	133,624	133,624	-133,578	-99.97	0	0.43

- Quick overview of each line for previous & current year and %LY
- Can be summarized by parent company.

# Sales Reports

## Manufacturer Summary

Sales-Reports

Manufacturer Summary : Report Filter

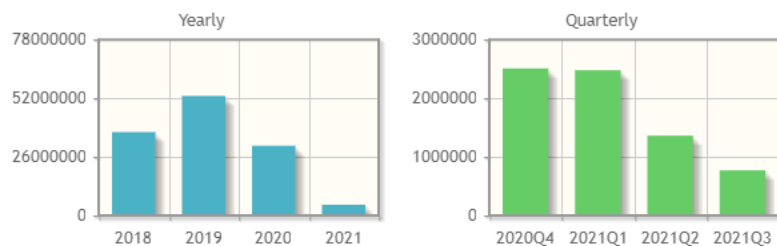
Customer Details  
Customer Summary  
Product Details  
Product Sales History  
Sales by Month  
Sales Comparison  
Credited Sales Summary  
Manufacturer Page  
Line Overview  
Plan Vs Actual  
Sales Analytical Summary  
Manufacturer Summary

As of: 2021  
Month: July  
Manufacturer: All  
Distributor: All  
Sales Team:   
Customer: All  
Company Region:   
Summarize by Parent Company:

[View Report](#)

### RepSalesForce Manufacturer Summary

Quarter : 2021-Q3, Month : July



Manufacturer: All  
Distributor: All  
Sales Team:   
Customer: All

[View Report](#)

Parent Company	Previous Year	Current Year	% to LY
Sterling	1,729,649	1,024,285	59.22%
Legend	3,116,653	643,149	20.64%
Hundred Acre Wood Lumber		541,350	
MCM Productions	422,071	438,712	103.94%
PBC Linear +	1,716,600	336,612	19.61%
RectorSeal	2,628,439	308,583	11.74%
QuantumFlow	3,449,090	297,688	8.63%
Signal Transformers	1,704,920	297,688	17.46%
Acme Explosives	2,522,926	281,071	11.14%
A.C.M.E. Incorporated	991,960	145,656	14.68%
Zurn +	6,179,277	130,452	2.11%
Leviton	1,153,663	37,140	3.22%
JSM Manufacturing	142,580	32,808	23.01%
BRK	682,696	29,917	4.38%
HANSGROHE	130,829	28,560	21.83%
ABB	1,597,625	21,200	1.33%
Zoeller	495,232	1,132	0.23%
Eaton	363,006	1,000	0.28%
Landscape Forms	1,324,761	-3,475	-0.26%

# Commission Reports

- Sales and commission summarized by manufacturer.
- Use it for sales rep's totals at month end.
- Check "Sales Team" in upper right corner. The default is to include commission earned for all the sales teams the rep is on combined.

# Commission Reports

## Sales Rep Summary

Commission Reports

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?
- YTD Sales Comparison ?
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?
- Commission Details ?
- PO Backlog Report

Sales Rep Summary : Report Filter

From:

To:

Sales Rep:

Manufacturer:

Customer:

Sales Team:

Group by:

Manufacturer

Customer

Sales Team

Show Credited Sales

[View Report](#)

RepSalesForce

Sales Rep Summary

From: 07-01-2021

To: 07-31-2021

- Group by
- Manufacturer
- Customer
- Sales Team

Sales Rep

Manufacturer

Customer

Sales Team

[View Report](#)



Manufacturer ↑↓	Sales Amt ↑↓	Split Inv. Amount ↑↓	Comm. Amt ↑↓
Signal Transformers	82,772.47	82,772.47	4,138.62
QuantumFlow	82,772.47	82,772.47	4,138.62
Sterling	69,692.22	69,692.22	3,484.61
Legend	69,692.22	69,692.22	3,484.61
RectorSeal	32,314.80	32,314.80	1,615.74
PBC Linear +	32,314.80	32,314.80	1,615.74
Bel Fuse	5,700.00	5,700.00	399.00
Leviton	254.15	254.15	12.71
Zoeller	254.15	254.15	12.71
ABB	-3,235.96	-3,235.96	-161.80
Landscape Forms	-3,235.96	-3,235.96	-161.80
<b>Total</b>	<b>369,295.36</b>	<b>369,295.36</b>	<b>18,578.76</b>

- Run this report for ALL "Sales Rep" and ALL "Sales Team" to surface a commission report for all sales reps to check their overall numbers.

# Commission Reports

## Sales Rep Summary

Commission Reports

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report
- Cash Flow ForeCast

Sales Rep Summary : Report Filter

From: 04-01-2021

To: 06-30-2021

Sales Rep: Alexa Admin, Amber Ruffin

Manufacturer: All

Customer: All

Sales Team: All

Group by:  Manufacturer,  Customer,  Sales Team

Show Credited Sales

[View Report](#)

RepSalesForce

Sales Rep Summary

From: 04-01-2021

To: 06-30-2021

Group by:  Manufacturer,  Customer,  Sales Team

Sales Rep: Admin, Alexa Admin

Manufacturer: All

Customer: All

Sales Team: All

[View Report](#)

Chris Farley			
Manufacturer	Sales Amt	Split Inv. Amount	Comm. Amt
Sterling	421,634.00	421,634.00	21,081.70
Bourns	247,059.60	247,059.60	12,352.98
Xpress Buy / Sell	174,574.40	174,574.40	8,728.72
Aliseating	141,233.53	141,233.53	7,061.70
Southwire +	141,233.53	141,233.53	7,061.70
Signal Transformers	66,795.89	66,795.89	3,339.80
Rheem	66,795.89	66,795.89	3,339.80
Bel Fuse	28,781.90	28,781.90	1,500.00
MC Smith Industries	27,290.30	8,187.09	380.86
MCM Productions	10,000.00	3,000.00	225.00
Acme Explosives	45.80	45.80	90.00
JPW +	513.25	513.25	25.67
Zoeller	513.25	513.25	25.67
ABB	-299.22	-299.22	-14.96
Landscape Forms	-299.22	-299.22	-14.96
Tie Down +	18,724.00	18,724.00	-1,918.88
<b>Total</b>	<b>1,344,596.90</b>	<b>1,318,493.69</b>	<b>63,264.80</b>
Bill Murray			
Manufacturer	Sales Amt	Split Inv. Amount	Comm. Amt
Bel Fuse	11,007.90	2,561.58	411.58
JSM Manufacturing	22,183.95	6,049.563	404.23
Bradford White	2,508.43	501.686	26.07
Eaton	1,000.00	500.00	25.00



# Commission Reports

## Sales Rep Summary

✓ This version adds columns for "Credited Sales."

Commission Reports

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?
- YTD Sales Comparison ?
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?
- Commission Details ?
- PO Backlog Report

Sales Rep Summary : Report Filter

From: 07-01-2021

To: 07-31-2021

Sales Rep: Chris Farley

Manufacturer: All

Customer: All

Sales Team: All

Group by:  Manufacturer  Customer  Sales Team

Show Credited Sales

[View Report](#)

**RepSalesForce**

**Sales Rep Summary**

**From: 01-01-2021**

**To: 08-31-2021**

Group by  Manufacturer  Customer  Sales Team

Sales Rep: Chris Farley

Manufacturer: All

Customer: All

Sales Team: All

[View Report](#)

Manufacturer ↑↓	Sales Amt ↑↓	Split Inv. Amount ↑↓	Comm. Amt ↑↓	Credited Sales ↑↓
Sterling	998,267.85	998,267.85	49,913.37	0.00
Bourns	655,190.63	655,190.63	32,958.06	0.00
DCM Confections	426,957.36	426,957.36	21,347.84	0.00
Signal Transformers	299,238.36	299,238.36	17,959.42	60,000.00
dynawave +	326,612.87	320,298.401	16,330.46	0.00
Elkay	308,583.20	308,583.20	15,429.22	0.00
TT Electronics +	297,688.36	297,688.36	14,884.42	0.00
Acme Explosives	341,498.70	340,408.14	14,611.22	81,445.80
Delta Faucets Inc	90,000.00	90,000.00	10,000.00	0.00
Bel Fuse	167,386.72	91,305.72	4,678.16	0.00
Eaton	134,415.32	50,983.97	2,926.17	0.00



# Commission Reports

## Sales Rep Detail – Show credited sales

✓ This version adds columns for “Credited Sales.”

**Commission Reports**

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report

**Sales Rep Details : Report Filter**

From: 07-01-2021

To: 07-31-2021

Sales Rep: Chris Farley

Manufacturer: All

Customer: All

Sales Team: All

Group by:  Manufacturer  Customer  Sales Team

Show Credited Sales

[View Report](#)

**RepSalesForce**

**Sales Rep Details**

**From:** 08-01-2021

**To:** 08-31-2021

Show Expanded List

Group by  Manufacturer  Sales Team

Sales Rep: Chris Farley

Manufacturer: All

Sales Team: Chris/Bill

[View Report](#) [Export](#)

Eaton												
↑↓	Sales Team ↑↓	Invoice ↑↓	Inv Date ↑↓	Chk Date ↑↓	Invoice Amt ↑↓	Comm.Rate % ↑↓	Comm. Amt ↑↓	Split (%) ↑↓	Split Inv.Amt ↑↓	Rep Comm. Amt ↑↓	Total Sales ↑↓	Credited Sales ↑↓
John's Lawns	Chris/Bill	080521	08-05-2021	08-05-2021	10,500.50	10.00	1,050.05	30.00	3,150.15	315.01	0.00	0.00
<b>Sub Total</b>					<b>10,500.50</b>		<b>1,050.05</b>		<b>3,150.15</b>	<b>315.01</b>	<b>0.00</b>	<b>0.00</b>
<b>Total</b>					<b>10,500.50</b>		<b>1,050.05</b>		<b>3,150.15</b>	<b>315.01</b>	<b>0.00</b>	<b>0.00</b>
<b>Grand Total :</b>					<b>10,500.50</b>					<b>315.01</b>		

# Commission Reports

## Sales Rep Details– Show credited sales expanded

✓ Allows for “Expanded Version” to see more details.

Commission Reports

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report

Sales Rep Details : Report Filter

From: 07-01-2021

To: 07-31-2021

Sales Rep: Chris Farley

Manufacturer: All

Customer: All

Sales Team: All

Group by:
 

- Manufacturer
- Customer
- Sales Team

Show Credited Sales

[View Report](#)

RepSalesForce

Sales Rep Details

From: 08-01-2021

To: 08-31-2021

Group by  Manufacturer  Sales Team

Sales Rep: Chris Farley

Manufacturer: All

Customer: All

Sales Team: Chris/Bill

[View Report](#) [Export](#)

Show Expanded List

Eaton															
Distributor	Secondary Customer	Part Number	Invoice	Inv Date	Chk Date	Invoice Amt	Comm.Rate %	Comm. Amt	Split (%)	Split Inv.Amt	Rep Comm. Amt	PO #	SO #	Total Sales	Credited Sales
			080521	08-05-2021	08-05-2021	10,500.50	10.00	1,050.05	30.00	3,150.15	315.01			0.00	0.00
						<b>Sub Total</b>		<b>1,050.05</b>		<b>3,150.15</b>	<b>315.01</b>			<b>0.00</b>	<b>0.00</b>
						<b>Total</b>		<b>1,050.05</b>		<b>3,150.15</b>	<b>315.01</b>			<b>0.00</b>	<b>0.00</b>
								<b>Grand Total :</b>		<b>10,500.50</b>			<b>315.01</b>		

# Commission Reports

## Sales & Commission by Month

- Chart of all commissions by month by manufacturer with the total of invoices/sales compensated for in that check.
- Use immediately after completing a commissions import to affirm accuracy of import and posting.
- The commission value is raw and should match the check amount. The sales on the upper row may fall in different months than the actual check date. This combination view allows you to check verbatim numbers on the report and check in one place

**Commission Reports**

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report

Sales/Commission by Month : Report Filter

As of:

Manufacturer:

Sales Team:

Customer:

Summary by:  Manufacturer  Customer

[View Report](#)

**RepSalesForce**  
**Sales and Commission by month**  
**As of : 2021**

Manufacturer:

Sales Team:

Customer:

[View Report](#)

Manufacturer	Sal/Com	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	%
ABB	Sales	0	13,679	6,810	-427	3,410	0	-3,236	61	0	0	57	0	20,353	0.3%
	Comm	0	684	340	-21	210	0	-162	3	0	0	3	0	1,057	0.3%
Acme Explosives	Sales	244,145	0	97,398	46	0	738	0	0	0	0	0	11,166	353,493	4.9%
	Comm	9,657	0	4,937	90	0	37	0	0	0	0	0	558	15,280	4.1%
Bel Fuse	Sales	139,819	0	0	39,981	0	0	96,685	0	0	0	0	0	276,484	3.8%
	Comm	6,975	0	0	2,627	0	0	6,768	0	0	0	0	0	16,370	4.4%
BRK	Sales	0	11,574	0	0	0	0	26,017	0	93,572	0	0	0	131,163	1.8%
	Comm	0	1,157	0	0	0	0	1,301	0	4,679	0	0	0	7,137	1.9%
DCM Confections	Sales	5,805	24,141	52,831	0	0	174,574	0	175,411	67,206	0	45,496	60,508	605,973	8.4%
	Comm	580	1,207	2,642	0	0	8,729	0	8,771	3,360	0	2,275	3,025	30,589	8.2%
Eaton	Sales	130,829	0	0	1,000	0	0	0	0	37	460	0	123	132,449	1.8%
	Comm	6,807	0	0	50	0	0	0	0	2	23	0	6	6,888	1.9%
HANSGROHE	Sales	130,829	0	0	28,560	0	0	0	0	0	0	0	0	159,389	2.2%
	Comm	6,807	0	0	1,443	0	0	0	0	0	0	0	0	8,250	2.2%
Hundred Acre Wood Lumber	Sales	541,350	0	0	0	0	0	0	0	0	0	0	0	541,350	7.5%
	Comm	32,937	0	0	0	0	0	0	0	0	0	0	0	32,937	8.9%

# Commission Reports

## Sales/Commission Comparison

- Comparison of period specified with sales on the left and commissions on the right. Includes current year to prior year. This is the only report that offers average commission rate.
- Helpful for accountability on growth per line.
- To see an average of commission received by commission RATE - this is the only report to pull that from.
- You can exclude inactive manufacturers.

Commission Reports

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?**
- YTD Sales Comparison ?
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?
- Commission Details ?
- PO Backlog Report

Commission Comparison : Report Filter

As of:

Manufacturer:   
 Customer:   
 Sales Team:

Group by:  Manufacturer  Customer

Sales Team break up:   
 Exclude Inactive Manufacturer:

[View Report](#)

**RepSalesForce**

**Commission to Sales Comparison**

As of: 2021

Group by:  Manufacturer  Customer

Year:   
 Month:

Manufacturer:   
 Sales Team:   
 Customer:

[View Report](#) [Export](#)

ABB							
Customer ↑↓	Sales			Commission			Avg. Comm. Rate
	July 2021	Jan-July 2021	Jan-July 2020	July 2021	Jan-July 2021	Jan-July 2020	
Ace Boca Raton		9,820.78			491.03		5.00%
Ace Deerfield		10,667.8			533.4		5.00%
AIT - Jacksonville		2,500			125		5.00%
AIT-Destin		782			78.2		10.00%
Buccaneer Supply Tampa	-3,235.96	-3,535.18	531,369.83	-161.8	-176.76	26,568.48	5.00%
Ferguson-Jacksonville Beach			192			9.6	
<b>Total :</b>	<b>-3,235.96</b>	<b>20,235.4</b>	<b>531,561.83</b>	<b>-161.8</b>	<b>1,050.87</b>	<b>26,578.08</b>	

Acme Explosives							
Customer ↑↓	Sales			Commission			Avg. Comm. Rate
	July 2021	Jan-July 2021	Jan-July 2020	July 2021	Jan-July 2021	Jan-July 2020	
33 West Monroe Associates LLC		4,480	28,131		268.8	2,813.11	6.00%
Ace HQ			1,940			62	
Ace Coral Gables		89.68	2,092.5		8	104.63	8.92%
Ace Jacksonville			452			22.6	
Ace Supply Tampa		22.9	132,624.09		45	7,266.2	196.51%
AFCO Performance Group, LLC			9,453.6			945.36	
AIT-Casselberry		1,920	970		115.2	97	6.00%
AIT-Tampa-HQ			876.23			76.72	
All Points Screw Tampa HQ			29,595.5			1,479.85	
Apex Tool & Fasteners, Inc.-Clearwater			5,835.06			291.75	
BC Industrial Supply, Inc-Clermont			9,100.08			910.01	
Buckeye - Memphis		738.02			36.83		4.99%
CATERPILLAR INC			91,699.45			4,584.99	
Coburns Supply-Tampa			747,370.77			37,368.54	

# Commission Reports

## Sales/Commission comparison – w/Sales Team breakdown

✓ This version shows breakdown by sales team.

**Commission Reports**

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?**
- YTD Sales Comparison ?
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?
- Commission Details ?
- PO Backlog Report ?

Commission Comparison : Report Filter

As of: 2021 (Year) / July (Month)

Manufacturer: All

Customer: All

Sales Team: All

Group by:  Manufacturer  Customer

**Sales Team break up**

Exclude Inactive Manufacturer

[View Report](#)

**RepSalesForce**

**Commission to Sales Comparison**

As of: 2021

Group by:  Manufacturer  Customer

Year: 2021 / Month: August

Manufacturer: All

Sales Team: All

Customer: All

[View Report](#) [Export](#)

**For: Chris Farley**

ABB							
Customer ↑↓	Sales			Commission			Avg.Comm. Rate
	Aug 2021	Jan-Aug 2021	Jan-Aug 2020	Aug 2021	Jan-Aug 2021	Jan-Aug 2020	
Buccaneer Supply Tampa	60.53	-3,474.65	584,385.9	3.03	-173.73	29,219.28	5
Weinstein Supply(Hajoca)-Bradenton	0	0	1,414.4	0	0	70.72	
<b>Total :</b>	<b>60.53</b>	<b>-3,474.65</b>	<b>585,800.3</b>	<b>3.03</b>	<b>-173.73</b>	<b>29,290</b>	

Acme Explosives							
Customer ↑↓	Sales			Commission			Avg.Comm. Rate
	Aug 2021	Jan-Aug 2021	Jan-Aug 2020	Aug 2021	Jan-Aug 2021	Jan-Aug 2020	
33 West Monroe Associates LLC	0	4,480	28,131	0	268.8	2,813.11	6
A.C.M.E. Incorporated	0	0	1,200	0	0	60	
Ace HQ	0	0	1,940	0	0	62	
Ace Supply Tampa	0	22.9	133,624.09	0	45	7,316.2	196.51
AFCO Performance Group, LLC	0	0	9,453.6	0	0	945.36	
All Points Screw Tampa HQ	0	0	29,595.5	0	0	1,479.85	
Apex Tool & Fasteners, Inc.-Clearwater	0	0	5,835.06	0	0	291.75	
Coburns Supply-Tampa	0	0	747,370.77	0	0	37,368.54	
Ferguson Enterprises, Inc	0	0	47,059.66	0	0	2,352.97	

- Customer, distributor, previous year, current year, last year to date and year to date firm commission are listed here.
- Helpful for accountability on growth per customer and distributor.
- It could be used if your fiscal year is not aligned to calendar year. In other words, you could pull this report October - September if a principal wants to know the numbers according to their fiscal calendar.

# Commission Reports

## YTD Sales Comparison

**Commission Reports**

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?
- YTD Sales Comparison ?**
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?
- Commission Details ?
- PO Backlog Report ?

**YTD Sales Comparison : Report Filter**

As of: 07-31-2021

Manufacturer: All

Sales Team: All

Distributor: All

Customer: All

Group by:  Manufacturer  Customer  Distributor

[View Report](#)

**RepSalesForce**

**YTD Sales Comparison**

**As of : 2021-07-31**

Group by

Manufacturer

Customer

Distributor

Manufacturer: All

Sales Team: All

Distributor: All

Customer: All

[View Report](#)

ABB					
Customer ↑↓	Distributor ↑↓	YTD(Previous Year) ↑↓	YTD(Current Year) ↑↓	LYT(Previous Year) ↑↓	YTD(Firm Commission) ↑↓
Weinstein Supply(Hajoca)-Bradenton	Weinstein Supply(Hajoca)-Bradenton	1,414.40		1,414.40	
AIT - Jacksonville	AIT - Jacksonville		2,500.00		125.00
CITY LIGHTING PRODUCTS COMPANY	CITY LIGHTING PRODUCTS COMPANY			415.96	
CE POWER SOLUTIONS, LLC	CE POWER SOLUTIONS, LLC			15,317.92	
CBT COMPANY	CBT COMPANY			6,008.50	
WESCO Warrendale	WESCO Warrendale			2,877.36	
PCS NITROGEN OHIO, LP				15,985.00	
SCOTT ELECTRIC CO Duncansville	SCOTT ELECTRIC CO Duncansville			11,749.55	
NEEDHAM ELECTRIC SUPPLY CORPORATION	NEEDHAM ELECTRIC SUPPLY CORPORATION			1,046.15	
JCLETRIC, LLC	JCLETRIC, LLC			1,001.39	
SCOTT ELECTRIC Greensburg	SCOTT ELECTRIC Greensburg			55,135.54	
SCOTT ELECTRIC Erie	SCOTT ELECTRIC Erie			26,862.23	
SCOTT ELECTRIC COMPANY Hagerstown	SCOTT ELECTRIC COMPANY Hagerstown			10,145.09	
GEXPRO Pittsburg	GEXPRO Pittsburg	-9,727.02		93,506.52	
SCOTT ELECTRIC COMPANY Pittsburg	SCOTT ELECTRIC COMPANY Pittsburg			94,201.54	
Ferguson-Jacksonville Beach	Ferguson-Jacksonville Beach	192.00		192.00	
Buccaneer Supply Tampa	Buccaneer Supply Tampa	604,888.75	-3,474.65	609,128.49	-176.76
AIT-Destin	AIT-Destin		782.00		78.20
AIT-Gainesville	AIT-Gainesville		903.98		
Ace Deerfield			10,667.80		533.40
Ace Boca Raton	Ace Boca Raton		9,820.78		491.03
WEBER ELECTRIC Ashtabula	WEBER ELECTRIC Ashtabula			2,478.94	



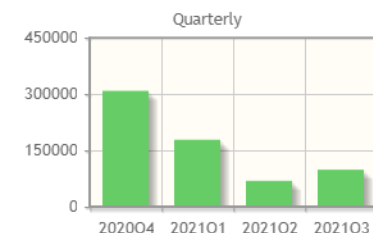
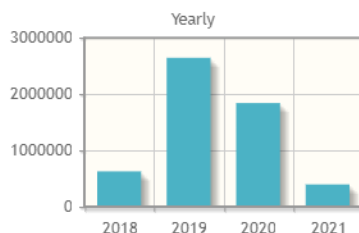
# Commission Reports

## Line Overview

- Sales Reports >
- CRM Reports >
- Commission Reports >
  - Sales Rep Summary
  - Sales Rep Details
  - Sales/Comm by Month
  - Sales/Comm Comparison
  - YTD Sales Comparison
  - Line Overview
  - Commission Expanded
  - Commission Summary
  - Commission Details
  - PO Backlog Report

- Color Key on health of account. Lists in order of highest current annual sales first.
- Easy to use to run a sales meeting for high-level overview without revealing actual company revenue values.
- Click to dive deeper on colored square or blue word. The click through on a company name presents the Manufacturer Page report listing commissions brought in from that manufacturer.

**RepSalesForce**  
**Commission Line Overview**  
 As of : 2021



Year

Month



Manufacturer ↑↓	Q3-2021 ↑↓	Q3-2020 ↑↓	2021 ↑↓	2020 ↑↓	Year Pct ↑↓	Invoice Date ↑↓	Last Check
Sterling	31,859	31,726	<u>69,959</u>	91,308	-23%	12-26-2021	01-26-2022
Signal Transformers	8,491	25,046	<u>47,760</u>	87,565	-45%	12-14-2021	01-14-2022
Legend	13,749	30,655	<u>39,791</u>	157,418	-75%	12-26-2021	01-26-2022
Hundred Acre Wood Lumber			<u>32,937</u>			01-10-2021	01-21-2021
QuantumFlow	8,491	50,092	<u>30,987</u>	244,144	-87%	12-14-2021	01-14-2022
DCM Confections	12,131	10,615	<u>30,589</u>	15,245	101%	12-13-2021	01-13-2022
PBC Linear +	4,973	23,362	<u>21,173</u>	109,784	-81%	12-17-2021	01-17-2022
RectorSeal	4,973	38,093	<u>18,640</u>	165,477	-89%	12-17-2021	01-17-2022
Bel Fuse	6,768	10,549	<u>17,270</u>	44,610	-61%	06-30-2021	07-22-2021
Acme Explosives		15,207	<u>15,280</u>	170,321	-91%	12-26-2021	01-26-2022
Zurn +		25,339	<u>10,237</u>	366,461	-97%	12-26-2021	01-26-2022
Legrand			<u>8,366</u>			01-06-2021	03-25-2021
HANSGROHE			<u>8,250</u>			02-28-2021	04-08-2021
BRK	5,980	11,825	<u>7,137</u>	35,242	-80%	08-30-2021	09-30-2021
Eaton	2	189	<u>6,888</u>	13,895	-50%	12-01-2021	01-01-2022
Mersen	2		<u>6,838</u>	59,851	-89%	12-01-2021	01-01-2022

- Lists by month and by manufacturer commissions- only numbers.
- One way to see by sales team their monthly and year-to-date earnings.
- Looks like the sales by month report, except this is commissions only. Also, like Sales/Comms by month which lists both commissions and sales together.

# Commission Reports

## Commission Expanded

Sales Reports >

CRM Reports >

Commission Reports >

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded**
- Commission Summary
- Commission Details
- PO Backlog Report

RepSalesForce

Commission Expanded View

As of :2021

Year

2021



Manufacturer	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	% ↑↓
ABB	0	684	340	-21	210	0	-162	3	0	0	3	0	1,057	0.3%
Acme Explosives	9,657	0	4,937	90	0	37	0	0	0	0	0	558	15,280	4.1%
Bel Fuse	6,975	0	0	2,627	0	0	6,768	0	0	0	0	0	16,370	4.4%
BRK	0	1,157	0	0	0	0	1,301	0	4,679	0	0	0	7,137	1.9%
DCM Confections	580	1,207	2,642	0	0	8,729	0	8,771	3,360	0	2,275	3,025	30,589	8.2%
DEMO - DOCUMENTS	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
Eaton	6,807	0	0	50	0	0	0	0	2	23	0	6	6,888	1.9%
HANSGROHE	6,807	0	0	1,443	0	0	0	0	0	0	0	0	8,250	2.2%
Hundred Acre Wood Lumber	32,937	0	0	0	0	0	0	0	0	0	0	0	32,937	8.9%
JSM Manufacturing	1,478	0	36	471	307	705	340	0	0	0	0	0	3,336	0.9%
Landscape Forms	0	0	0	-21	6	0	-162	3	0	30	3	21	0	0.0%
Legend	1,341	4,849	5,512	9,966	701	1,686	3,485	6,846	3,419	0	1,987	0	39,791	10.7%
Legrand	6,682	0	1,684	0	0	0	0	0	0	0	0	0	8,366	2.3%
Leviton	3,072	95	6	26	0	0	13	1	8	-44	-52	0	3,124	0.8%
Lorenz	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
MCM Productions	1,478	0	0	750	0	0	150	0	0	0	0	0	2,378	0.6%
Mersen	6,807	0	0	0	0	0	0	0	2	23	0	6	6,838	1.8%
On Semi	0	0	0	0	0	0	0	0	0	30	0	21	51	0.0%
PBC Linear +	0	4,577	3,101	2,039	2,172	2,851	1,616	1,607	1,751	435	1,025	0	21,173	5.7%
QuantumFlow	0	5,642	0	0	613	2,727	4,139	1,764	2,589	3,623	8,338	1,554	30,987	8.3%
RectorSeal	0	2,044	3,101	2,039	2,172	2,851	1,616	1,607	1,751	435	1,025	0	18,640	5.0%
Signal Transformers	272	5,642	0	0	613	2,727	4,139	1,764	2,589	3,623	8,338	1,554	31,260	8.4%

# Commission Reports

## Commission Summary

- Sales, commission and company split summarized by manufacturer. Can be run by rep or sales team.
- Report to use for sales rep total at month end.
- Has variety of sort views. Will only show sales of the person logged in for any sales team they are on. Does include company split so it is typically not shared with reps.
- Can be summarized by parent company.

Commission Reports

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?
- YTD Sales Comparison ?
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?**
- Commission Details ?
- PO Backlog Report

Commission Summary : Report Filter

From: 07-01-2021

To: 07-31-2021

Manufacturer: All

Customer: All

Sales Team: All

Group by:  Manufacturer  Customer  Sales Team

Summarize by Parent Company

[View Report](#)

RepSalesForce

### Commission Summary Report

From: 07-01-2021

To: 07-31-2021

Group by  Manufacturer  Customer  Sales Team

Manufacturer: All

Customer: All

Sales Team: All

[View Report](#)

Manufacturer	Sales Amt	Comm. Amt	Company Split
Bel Fuse	96,685	6,767.95	6,050.50
Sterling	95,709	4,785.47	1,014.68
QuantumFlow	82,772	4,138.62	0.00
Signal Transformers	82,772	4,138.62	0.00
Legend	69,692	3,484.61	0.00
PBC Linear +	32,315	1,615.74	0.00
RectorSeal	32,315	1,615.74	0.00
BRK	26,017	1,300.86	1,014.68
JSM Manufacturing	3,142	339.59	237.72
MCM Productions	1,500	150.00	135.00
Zoeller	254	12.71	0.00
Leviton	254	12.71	0.00
ABB	-3,236	-161.80	0.00
Landscape Forms	-3,236	-161.80	0.00
<b>Total</b>	<b>516,957</b>	<b>28,039.02</b>	<b>8,452.58</b>

# Commission Reports

## Commission Details

- Line by line, each sale and commission with company split. Can be grouped by rep, manufacturer, or sales team.
- This could be helpful to cross-reference or troubleshoot any reconciling for commissions payout or sales numbers in general.
- Has variety of sort views. Will only show sales of the person logged in for any sales team they are on. Does include company split so might not be ideal for sharing with rep if that is a concern. Also shows a column for Paid as yes or no. This tool is for audit purposes only and is triggered line by line from the Commission Data Overview table column for paid. The default is no so it can be ignored on company reports. This report is generally not shared with reps.

**Commission Reports**

- Sales Rep Summary ?
- Sales Rep Details ?
- Sales/Comm by Month ?
- Sales/Comm Comparison ?
- YTD Sales Comparison ?
- Line Overview ?
- Commission Expanded ?
- Commission Summary ?
- Commission Details ?**
- PO Backlog Report

**Commission Details : Report Filter**

From: 08-01-2021

To: 08-31-2021

Manufacturer: All

Customer: All

Sales Team:  Clear

Group by:  Manufacturer  Customer  Sales Team

Show Credited Sales:

Sub Group by Region:

[View Report](#)

**RepSalesForce**  
**Commission Details Report**  
**From: 08-01-2021**  
**To: 08-31-2021**

Group by:  Manufacturer  Customer  Sales Team

Manufacturer: All

Customer: All

Sales Team: All

[View Report](#)

PBC Linear +									
Customer ↑↓	Sales Team ↑↓	Distributor ↑↓	Invoice ↑↓	Inv Date ↑↓	Chk Date ↑↓	Sales Amt ↑↓	Comm. Amt ↑↓	Company Split ↑↓	Paid ↑↓
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-09-2021	08-09-2021	2,646	132.30	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-09-2021	08-09-2021	6,550	327.48	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-10-2021	08-10-2021	2,340	117.01	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-15-2021	08-15-2021	2,151	107.53	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-26-2021	08-26-2021	2,875	143.75	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-26-2021	08-26-2021	3,819	190.97	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-26-2021	08-26-2021	2,246	112.32	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-30-2021	08-30-2021	9,504	475.20	0.00	No
					<b>Total</b>	<b>32,131</b>	<b>1,606.56</b>	<b>0.00</b>	

Leviton									
Customer ↑↓	Sales Team ↑↓	Distributor ↑↓	Invoice ↑↓	Inv Date ↑↓	Chk Date ↑↓	Sales Amt ↑↓	Comm. Amt ↑↓	Company Split ↑↓	Paid ↑↓
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-11-2021	08-11-2021	-125	-6.24	0.00	No
Ferguson Enterprises, Inc	Chris Farley	Ferguson Enterprises, Inc		07-15-2021	08-15-2021	29	1.47	0.00	No

# Commission Reports

## Commission Details

✓ This version shows credited sales.

Commission Reports

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report

Commission Details : Report Filter

From: 08-01-2021

To: 08-31-2021

Manufacturer: All

Customer: All

Sales Team: [Dropdown]

Group by:
   
 Manufacturer
   
 Customer
   
 Sales Team

Show Credited Sales

Sub Group by Region

[View Report](#)

RepSalesForce

Commission Details Report

From: 07-01-2021

To: 07-31-2021

Group by:
   
 Manufacturer
   
 Customer
   
 Sales Team

Manufacturer: All

Customer: All

Sales Team: All

[View Report](#)

Chris Farley

Manufacturer	Customer ↑↓	Distributor ↑↓	Invoice ↑↓	Inv Date ↑↓	Chk Date ↑↓	Sales Amt ↑↓	Comm. Amt ↑↓	Company Split ↑↓	Paid ↑↓	Total Sales ↑↓	Credited Sales ↑↓
Leviton	Ferguson Enterprises, Inc	Ferguson Enterprises, Inc		06-05-2021	07-05-2021	77	3.84	0.00	No	76.80	0.00
Zoeller	Ferguson Enterprises, Inc	Ferguson Enterprises, Inc		06-05-2021	07-05-2021	77	3.84	0.00	No	76.80	0.00
Landscape Forms	Buccaneer Supply Tampa	Buccaneer Supply Tampa		06-06-2021	07-06-2021	-3,236	-161.80	0.00	No	-3,235.96	0.00
ABB	Buccaneer Supply Tampa	Buccaneer Supply Tampa		06-06-2021	07-06-2021	-3,236	-161.80	0.00	No	-3,235.96	0.00
Sterling	Hajoca-Tampa S	Hajoca-Tampa S		06-10-2021	07-10-2021	28,135	1,406.73	0.00	No	28,134.58	0.00
PBC Linear +	Ferguson Enterprises, Inc	Ferguson Enterprises, Inc		06-10-2021	07-10-2021	2,444	122.19	0.00	No	2,443.88	0.00
Legend	Hajoca-Tampa S	Hajoca-Tampa S		06-10-2021	07-10-2021	28,135	1,406.73	0.00	No	28,134.58	0.00
RectorSeal	Ferguson Enterprises, Inc	Ferguson Enterprises, Inc		06-10-2021	07-10-2021	2,444	122.19	0.00	No	2,443.88	0.00
RectorSeal	Ferguson Enterprises, Inc	Ferguson Enterprises, Inc		06-12-2021	07-12-2021	3,659	182.96	0.00	No	3,659.25	0.00
PBC Linear +	Ferguson Enterprises, Inc	Ferguson Enterprises, Inc		06-12-2021	07-12-2021	3,659	182.96	0.00	No	3,659.25	0.00

# Commission Reports

## Commission Details

✓ This version shows report sub-grouped by region.

Commission Reports

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report

Commission Details : Report Filter

From: 08-01-2021

To: 08-31-2021

Manufacturer: All

Customer: All

Sales Team: [dropdown]

Group by:  Manufacturer  Customer  Sales Team

Show Credited Sales:

Sub Group by Region:

View Report

RepSalesForce  
Commission Details Report  
From: 01-01-2021  
To: 08-31-2021

Group by:  Manufacturer  Customer  Sales Team

Manufacturer: Acme Explosives

Customer: All

Sales Team: [dropdown]

View Report | Export

Acme Explosives											
Customer	Region	Sales Team	Distributor	Invoice	Inv Date	Chk Date	Sales Amt	Comm. Amt	Company Split	Paid	
33 West Monroe Associates LLC		Chris Farley	AIT-Casselberry	9098405	01-22-2021	03-18-2021	4,480	268.80	0.00	No	
Tesla		Chris Farley	Ace Supply Tampa	879987	04-19-2021	04-19-2021	23	45.00	0.00	No	
						<b>Sub Total</b>	<b>247,503</b>	<b>9,913.80</b>	<b>0.00</b>		
Graybar Tampa	FL West	Chris Farley	Graybar Tampa	NL011121-02	01-11-2021	01-11-2021	1,145	57.25	0.00	No	
						<b>Sub Total</b>	<b>1,145</b>	<b>57.25</b>	<b>0.00</b>		
Ace Coral Gables	FL South	Barney Rubble	Ace Coral Gables	89201	01-04-2021	03-18-2021	90	8.00	4.00	No	
						<b>Sub Total</b>	<b>90</b>	<b>8.00</b>	<b>4.00</b>		
AIT-Casselberry	FL North	Bill/Chris 50-50	AIT-Casselberry	9098405	01-22-2021	03-18-2021	1,920	115.20	11.52	No	
Ace Supply Tampa	FL North	Chris Farley	Ace Supply Tampa	879987	04-19-2021	04-19-2021	23	45.00	0.00	No	



- This report includes invoices that have not been paid and open orders.
- In both cases, the values of commissions are advanced to the bucket that corresponds to 'lag days' (the number of days after an invoice date where the rep would expect to be paid). *There can be exception lag days for special terms for customers.*

# Commission Reports

## Cash Flow Forecast

Commission Reports

- Sales Rep Summary
- Sales Rep Details
- Sales/Comm by Month
- Sales/Comm Comparison
- YTD Sales Comparison
- Line Overview
- Commission Expanded
- Commission Summary
- Commission Details
- PO Backlog Report
- Cash Flow ForeCast

Cash Flow ForeCast : Report Filter

Manufacturer: All

Sales Team: [Dropdown]

Group By:
   
 Manufacturer
   
 Sales Team

[View Report](#)

**RepSalesForce**  
**Cash Flow Forecast Report**



Manufacturer: All

Sales Team: [Dropdown]

[View Report](#) [Export](#)

ABB										
Sales Team	Type	Till Today	1 Month	2 Months	3 Months	4 Months	5 Months	6 Months	> 6 Months	Total
Barney Rubble	O	47.25	0.00	0.00	0.00	0	0.00	0.00	0.00	47.25
Bill Murray	O	1255.93	0.00	0.00	0.00	0	0.00	0.00	0.00	1255.93
Bill Murray	S	1256.97	0.00	0.00	0.00	0	0.00	0.00	0.00	1256.97
Chris Farley	S	78.90	0.00	0.00	0.00	0	0.00	0.00	0.00	78.90
Rodney Dangerfield	O	1255.92	0.00	0.00	0.00	0	0.00	0.00	0.00	1255.92
Rodney Dangerfield	S	1255.92	0.00	0.00	0.00	0	0.00	0.00	0.00	1255.92
<b>Total</b>		<b>5150.89</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>5150.89</b>
Acme Explosives										
Sales Team	Type	Till Today	1 Month	2 Months	3 Months	4 Months	5 Months	6 Months	> 6 Months	Total
Barney Rubble	O	1.14	0.00	0.00	0.00	0	0.00	0.00	0.00	1.14
Bill Murray	O	246.83	0.00	0.00	0.00	0	0.00	0.00	0.00	246.83
Chris Farley	O	1640.42	0.00	0.00	0.00	0	0.00	0.00	0.00	1640.42
Chris Farley	S	9375.00	0.00	0.00	0.00	0	0.00	0.00	0.00	9375.00
Rodney Dangerfield	O	1186.92	0.00	0.00	0.00	0	0.00	0.00	0.00	1186.92
Rodney Dangerfield	S	240.00	0.00	0.00	0.00	0	0.00	0.00	0.00	240.00

[Need Help?](#)



# Data Management Reports

# Data Management

## Commission Data Overview

- Shows each commission transaction that was imported.
- First column allows you to mark “paid” to rep.
- View by check date or invoice date.
- Shows secondary customers if applicable.
- Use “Show Totals” button to see a total of all transactons *on screen*.

Companies  
 Contacts  
 Opportunities  
 Activity Journals  
 Tasks  
 Messages  
 Email  
 Calendar  
 Planner  
 More CRM... >  
 Reporting >  
 Data Management >  
 Settings >

Import Transactions  
 Commissionable Transactions  
 Internal PN Splits  
 Customer Exceptions  
 PO Exceptions  
 Commission Split Exceptions  
 Region Exceptions  
 Import CRM Info  
**Commission Data Overview**  
 Sales Data Overview  
 Products Master  
 Customer Products

Commission Data Overview Tutorials Create

Filter by: Check Date From: 07-30-2020 To: 07-29-2021 Filter Show Totals  Paid  Unpaid  All Export

1 2 3 4 50

Paid	Batch	Invoice Date	Check Date	Invoice #	Manufacturer	Customer	Secondary Customer	Sales Team	Distributor	Part Number	Line Total	Commission	Quantity	Unit Price	Commission Rate	Check
<input checked="" type="checkbox"/>	16	01-22-2020	03-18-2021	KK43852	Bemis	Gopher Plumbing Supply		Midwest			1734.00	173.40	0.000	0.000000	10.00	0318:
<input checked="" type="checkbox"/>	16	01-23-2020	03-18-2021	KK43853	Bemis	Gopher Plumbing Supply		Midwest			1024.86	102.49	0.000	0.000000	10.00	0318:
<input checked="" type="checkbox"/>	0	03-04-2020	03-11-2021	NL34	Taco	Able Distributing Co.Inc.		Midwest	Able Distributing Co.Inc.		10000.00	10.00	0.000	0.000000	0.10	3112:
<input checked="" type="checkbox"/>	16	10-19-2020	03-18-2021	KK43757	Bemis	Gopher Plumbing Supply		Midwest			1525.92	152.59	0.000	0.000000	10.00	0318:
<input checked="" type="checkbox"/>	16	12-04-2020	03-18-2021	KK43803	Bemis	Gopher Plumbing Supply		Midwest			1421.88	142.19	0.000	0.000000	10.00	0318:
<input checked="" type="checkbox"/>	29	02-01-2021	04-09-2021	1003	Deer Foods Equipment	Forrest Restaurant Supply		Gilda/paula test		DD	1400.00	140.00	1.396	1003.000000	10.00	KK49
<input checked="" type="checkbox"/>	29	02-01-2021	04-09-2021	1001	Deer Foods Equipment	Forrest Restaurant Supply		Gilda/paula test		BB	500.00	40.00	0.500	1001.000000	8.00	KK49
<input checked="" type="checkbox"/>	29	02-01-2021	04-09-2021	1002	Deer Foods Equipment	Forrest Restaurant Supply		Gilda/paula test		CC	900.00	90.00	0.898	1002.000000	10.00	KK49
<input checked="" type="checkbox"/>	29	02-01-2021	04-09-2021	1000	Deer Foods Equipment	Forrest Restaurant Supply		Gilda/paula test		AA	200.00	20.00	0.200	1000.000000	10.00	KK49
<input checked="" type="checkbox"/>	18	02-01-2021	03-01-2021	1001	Bemis	Forrest Restaurant Supply		Gilda/paula test			500.00	50.00	0.000	0.000000	10.00	9998
<input checked="" type="checkbox"/>	18	02-01-2021	03-01-2021	1003	Bemis	Forrest Restaurant Supply		Gilda/paula test			1400.00	98.00	0.000	0.000000	7.00	9996
<input checked="" type="checkbox"/>	18	02-01-2021	03-01-2021	1002	Bemis	Forrest Restaurant Supply		Gilda/paula test			900.00	90.00	0.000	0.000000	10.00	9997
<input checked="" type="checkbox"/>	18	02-01-2021	03-01-2021	1000	Bemis	Forrest Restaurant Supply		Gilda/paula test			200.00	18.00	0.000	0.000000	9.00	9999
<input checked="" type="checkbox"/>	20	02-01-2021	02-01-2021	1001	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe		BB	200.00	20.00	20.000	10.000000	10.00	7777

# Data Management

## Sales Data Overview

- Shows each sales transaction that was imported.
- View by invoice date.
- Shows secondary customers if applicable.

- Companies
- Contacts
- Opportunities
- Activity Journals
- Tasks
- Messages
- Email
- Calendar
- Planner
- More CRM... >
- Reporting >
- Data Management >
- Settings >

- Import Transactions
- Commissionable Transactions
- Internal PN Splits
- Customer Exceptions
- PO Exceptions
- Commission Split Exceptions
- Region Exceptions
- Import CRM Info
- Commission Data Overview
- Products Master
- Customer Products

### Sales Data Overview

Tutorials Create

Invoice Date From: 07-30-2020 To: 07-29-2021 Filter Export

(1 of 3) 1 2 3

Batch No	Invoice Date	Invoice Number	Manufacturer	Customer	Secondary Customer	Sales Team	Distributor	Part Number	Line Total	Qty	Unit price
16	10-19-2020	KK43757	Bemis	Gopher Plumbing Supply		Midwest			1525.92	0.000	0.000000
16	12-04-2020	KK43803	Bemis	Gopher Plumbing Supply		Midwest			1421.88	0.000	0.000000
33	01-04-2021		Eiko	SMG Test 2		Michael Tiger			173.00	0.000	0.000000
33	01-08-2021		Eiko	SMG Test 2		Michael Tiger			347.80	0.000	0.000000
33	01-13-2021		Eiko	SMG Test 2		Michael Tiger			4900.00	0.000	0.000000
33	01-19-2021		Eiko	SMG Test 2		Michael Tiger			695.60	0.000	0.000000
33	01-20-2021		Eiko	SMG Test 3		Michael Tiger			1059.00	0.000	0.000000
33	01-27-2021		Eiko	SMG Test 2		Michael Tiger			9975.00	0.000	0.000000
23	02-01-2021	3000	Chronomite	Gopher Plumbing Supply		Midwest			100.00	0.000	0.000000
23	02-01-2021	3003	Chronomite	Gopher Plumbing Supply		Midwest			400.00	0.000	0.000000
23	02-01-2021	3001	Chronomite	Gopher Plumbing Supply		Midwest			200.00	0.000	0.000000
23	02-01-2021	3002	Chronomite	Gopher Plumbing Supply		Midwest			300.00	0.000	0.000000
21	02-01-2021	1000	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe			100.00	0.000	0.000000
21	02-01-2021	1002	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe			300.00	0.000	0.000000
21	02-01-2021	1001	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe			200.00	0.000	0.000000
21	02-01-2021	1003	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe			400.00	0.000	0.000000
20	02-01-2021	1000	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe		AA	100.00	10.000	10.000000
20	02-01-2021	1002	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe		CC	300.00	30.000	10.000000
20	02-01-2021	1001	Hundred Acre Wood Lumber	Briar Patch Tiny Tree Homes		Winston Poohe		BB	200.00	20.000	10.000000

Sales Data Overview

# CRM Reports

# CRM Report

## Funnel Report

- Shows where opportunities are in the sales funnel.
- View by user, sales team, manufacturer, or any combination.
- View by activity or stage.
- View count or dollar values.



### Funnel Report: Current

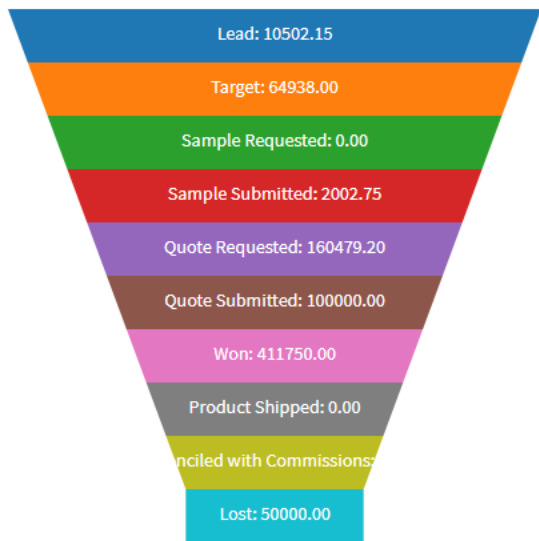
Show Current

Show Progressive

Tutorials

▼ Create

From \* 07-01-2021  Stage ▼  
To \* 08-10-2021  Value ▼



<input checked="" type="checkbox"/>	User ↑↓
<input checked="" type="checkbox"/>	Admin
<input checked="" type="checkbox"/>	Alexa Admin
<input checked="" type="checkbox"/>	Amber Ruffin
<input checked="" type="checkbox"/>	API Tester
<input checked="" type="checkbox"/>	Bill Murray
<input checked="" type="checkbox"/>	Chris Farley
<input checked="" type="checkbox"/>	Daniil
<input checked="" type="checkbox"/>	Jane Curtin
<input checked="" type="checkbox"/>	Lev
<input checked="" type="checkbox"/>	Murali Meleth
<input checked="" type="checkbox"/>	Richard Pryor
<input checked="" type="checkbox"/>	Rodney Dangerfield
<input checked="" type="checkbox"/>	Will Farrell
<input checked="" type="checkbox"/>	Yoxel

<input checked="" type="checkbox"/>	Sales Team ↑↓
<input checked="" type="checkbox"/>	1 TEST Bill Murray
<input checked="" type="checkbox"/>	Admin Accounts
<input checked="" type="checkbox"/>	All
<input checked="" type="checkbox"/>	Barney Rubble
<input checked="" type="checkbox"/>	Bean counters
<input checked="" type="checkbox"/>	Bill/Chris 50-50
<input checked="" type="checkbox"/>	Chris Farley
<input checked="" type="checkbox"/>	Chris/Bill
<input checked="" type="checkbox"/>	Fred Flintstone
<input checked="" type="checkbox"/>	House
<input checked="" type="checkbox"/>	Jane Curtin
<input checked="" type="checkbox"/>	Memphis Corporate
<input checked="" type="checkbox"/>	Rodney Dangerfield
<input checked="" type="checkbox"/>	Shared Accounts
<input checked="" type="checkbox"/>	Will Farrell
<input checked="" type="checkbox"/>	Wilma Flintstone
<input checked="" type="checkbox"/>	Winston Pooh
<input checked="" type="checkbox"/>	x\$ BamBam House
<input checked="" type="checkbox"/>	x\$ Barney Rubble
<input checked="" type="checkbox"/>	x\$ Betty Rubble
<input checked="" type="checkbox"/>	x\$ Brontoburgers Diner



<input checked="" type="checkbox"/>	Manufacturer ↑↓
<input checked="" type="checkbox"/>	ABB
<input checked="" type="checkbox"/>	Acme Explosives
<input checked="" type="checkbox"/>	Acme Fireworks
<input checked="" type="checkbox"/>	Bel Fuse
<input checked="" type="checkbox"/>	BRK
<input checked="" type="checkbox"/>	DCM Confections
<input checked="" type="checkbox"/>	Delta Faucets Inc
<input checked="" type="checkbox"/>	DEMO - DOCUMENTS
<input checked="" type="checkbox"/>	Eaton
<input checked="" type="checkbox"/>	EEMAX
<input checked="" type="checkbox"/>	HANS GROHE
<input checked="" type="checkbox"/>	Hundred Acre Wood Lumber
<input checked="" type="checkbox"/>	JSM Manufacturing
<input checked="" type="checkbox"/>	Landscape Forms
<input checked="" type="checkbox"/>	Legend
<input checked="" type="checkbox"/>	Legrand
<input checked="" type="checkbox"/>	Leviton
<input checked="" type="checkbox"/>	Lorenz
<input checked="" type="checkbox"/>	MCM Productions
<input checked="" type="checkbox"/>	Mersen
<input checked="" type="checkbox"/>	Mohawk Flooring

- Can show opportunity activity by customer, manufacturer or user.
- You can export opportunity activities or activity journals

# CRM Report

## Salesperson Activity

Salesperson Activity Tutorials Create

From: 06-01-2021  To: 08-10-2021  Customer View Export Journals Export Activities

	Users	Customer <span style="float: right;">⇅</span>	New Opportunities <span style="float: right;">⇅</span>	Owned Opportunities <span style="float: right;">⇅</span>	Activity Journal <span style="float: right;">⇅</span>	Emails Sent <span style="float: right;">⇅</span>	Emails Received <span style="float: right;">⇅</span>
<input checked="" type="checkbox"/>	Admin		0	0	1	0	0
<input checked="" type="checkbox"/>	Alexa Admin						
<input checked="" type="checkbox"/>	Amber Ruffin	33 West Monroe Associates LLC	2	2	0	4	4
<input checked="" type="checkbox"/>	API Tester	ABBA Construction, Inc	3	3	0	1	0
<input checked="" type="checkbox"/>	Bill Murray	Ace Supply Tampa	3	3	7	10	0
<input checked="" type="checkbox"/>	Chris Farley	AIT - Jacksonville	0	0	3	0	0
<input checked="" type="checkbox"/>	Daniil	Apex Tool & Fasteners, Inc.-Clearwater	1	1	0	0	0
<input checked="" type="checkbox"/>	Jane Curtin	Buccaneer Supply Tampa	1	1	0	0	0
<input checked="" type="checkbox"/>	Lev	Demo-1	1	1	2	0	0
<input checked="" type="checkbox"/>	Murali Meleth	Ferguson-Ft Lauderdale	1	1	1	1	0
<input checked="" type="checkbox"/>	Richard Pryor	FineLine Engineering	1	1	0	0	0
<input checked="" type="checkbox"/>	Rodney Dangerfield	Hajoca-Ft Lauderdale	3	3	8	2	0
<input checked="" type="checkbox"/>	Will Farrell	Hundred Acre Wood Lumber	0	0	1	0	0
<input checked="" type="checkbox"/>	Yoxel	Johnstone Supply-Tampa	0	0	1	0	0
		Microsoft Austin	0	0	0	0	6
		MSC Supply-Clearwater	0	0	1	0	0
		Repfabric, LLC	0	0	1	3	4
		Rockwell Automation Austin	0	0	0	14	28
		RPMs Speed Shop	0	0	0	0	1
		Segue Systems	1	1	0	2	0
		Tesla	1	1	1	1	0
		Test disrt	1	1	1	0	0

# CRM Report

## Opportunity Report

- Build a report by individual manufacturer or “All.”
- Choose the fields to see in your report by using “Add” button in top right corner.
- “Generate Report” will export your choices to Excel.
- “Export Opp History” is a *different* report and will show detail of when and by whom an opp was updated.

### Opportunity Reporting

Tutorials Create

1 2

Name ↑↓

Generate Report Export Opp History

Manufacturer All

Report Type  One Opportunity per row  One Row per Line Item File Type:  Excel  CSV

Filter By Open and Reporting turned ON

Last Modified Start Date Last Modified End Date

Seq.#	Field	Type
1	Customer	Opportunity (Standard)
2	Distributor	Opportunity (Standard)
3	Value	Opportunity (Standard)
4	Sales Team	Opportunity (Standard)
5	Manufacturer	Opportunity (Standard)
6	Est Annual Qty	Opportunity (Standard)
7	Principal Contact	Opportunity (Standard)
8	Follow Up	Opportunity (Standard)
9	Next Step	Opportunity (Standard)
10	Topic	Opportunity (Standard)
11	Closed-Date	Opportunity (Standard)
12	Affected by COVID-19	Opportunity (Custom Fields)
13	Closed-Reason	Opportunity (Standard)
14	Lead Source	Opportunity (Standard)

Add Edit Delete ↑ ↓

# CRM Report

## Opportunity History

- Build a report by individual manufacturer or “All.”
- Choose the fields to see in your report by using “Add” button in top right corner.
- “Generate Report” will export your choices to Excel.
- “Export Opp History” is a *different* report and will show detail of when and by whom an opp was updated.

Opportunity History Tutorials ▼ Create

From: 04-01-2021 To: 08-10-2021 Stage Run Report Export Sync History

Stage		During		Ending (As of 08-10-2021)
		Added	Progressed	
Lead - cold	7	0	0	7
Lead	341	36	7	370
Lead - Tradeshow	5	0	0	5
Prospect	8	0	0	8
Target	43	1	0	44
Sampling	19	0	0	19
Sample Shipping	0	0	0	0
Sample Submitted	44	1	1	44
Quote Requested	160	48	21	187
Presentation	2	0	0	2
Quote Submitted	113	26	17	122
Won	50	21	1	70
Product Shipped	11	0	0	11
Reconciled with Commissions	1	1	1	1
Lost	2	1	0	3
x Maintain Strategy	1	0	0	1
Lighting Layout	1	0	1	0
x Harvest Strategy	0	0	0	0
WON: Outbid to other disti	0	0	0	0
Price Increase	0	0	0	0

Admin  
 Alexa Admin  
 Amber Ruffin  
 API Tester  
 Bill Murray  
 Chris Farley  
 Daniil  
 Jane Curtin  
 Lev  
 Murali Meleth  
 Richard Pryor  
 Rodney Dangerfield  
 Will Farrell  
 Yoxel

Select Field  
 Stage  
 Stage Stage  
 Status  
 Priority  
 Potential (%)  
 Value





**EXPORTS**

- Make sure to change or delete dates in the “Modified” fields.
- Use the filter boxes at the top to narrow down your list.
- Place a check mark next to all columns you want to see in your export. Fields at the bottom, marked with (C), indicates it’s one of your custom fields.

# Companies Export

**Companies Export**
✕

File Type:  Excel  CSV 
Export
Close

Last Modified From:  Last Modified To:

More Filter Options ↶ -

Company Type <input type="text"/>	Sales Team <input type="text"/>
Category <input type="text"/>	Product Potentials <input type="text"/>
City <input type="text"/>	Industries <input type="text"/>

<input type="checkbox"/>	Fields
<input type="checkbox"/>	Name
<input type="checkbox"/>	Company Type
<input type="checkbox"/>	Rank
<input type="checkbox"/>	Category
<input type="checkbox"/>	LG Cust # (C)
<input type="checkbox"/>	Affected by COVID-19 (C)
<input type="checkbox"/>	Commission Rate (C)
<input type="checkbox"/>	Arrow Disti Contact (C)
<input type="checkbox"/>	Part Multiplier (C)

Note: (C) indicates Custom Fields.

# Contacts Export

- Make sure to change or delete dates in the “Modified” fields.
- Use the filter boxes at the top to narrow down your list.
- Place a check mark next to all columns you want to see in your export. Fields at the bottom, marked with (C), indicates it’s one of your custom fields.
- If you want a complete list, remove the check mark from “Exclude Do Not Email.”
- “Email Blast List” will export a list compatible with MailChimp and other email programs. It includes “tags” to use for your campaigns.

### Contacts Export

File Type:  Excel  CSV Export Close Email Blast List Send to Autoklose

Last Modified From:  Last Modified To:

More Filter Options Saved Filters

Filter Name  Save

Company Type	<input type="text"/>	<input type="button" value="Clear"/>	Sales Team	<input type="text"/>	<input type="button" value="Clear"/>
Category	<input type="text"/>	<input type="button" value="Clear"/>	Product Potentials	<input type="text"/>	<input type="button" value="Clear"/>
Companies	<input type="text"/>	<input type="button" value="Clear"/>	Contact Group	<input type="text"/>	<input type="button" value="Clear"/>
Company Region	<input type="text"/>	<input type="button" value="Clear"/>	Industries	<input type="text"/>	<input type="button" value="Clear"/>
Buying From	<input type="text"/>	<input type="button" value="Clear"/>	Rank	<input type="text"/>	<input type="button" value="Clear"/>
Product Interest	<input type="text"/>	<input type="button" value="Clear"/>	<input checked="" type="checkbox"/> Exclude Do not Email	<input type="checkbox"/> Primary Only	

<input type="checkbox"/>	Fields
<input type="checkbox"/>	First Name
<input type="checkbox"/>	Last Name
<input type="checkbox"/>	Full Name
<input type="checkbox"/>	
<input type="checkbox"/>	Birthday (C)
<input type="checkbox"/>	Anniversary (C)
<input type="checkbox"/>	Sports Teams/Hobbies (C)
<input type="checkbox"/>	Sharepoint Location (C)
<input type="checkbox"/>	test status (C)
<input type="checkbox"/>	Pet's Name (C)

Note: (C) indicates Custom Fields.

# Opportunity Export

- Use the Excel icon to export exactly what is on the screen.
- The drop-down in top left will help you narrow down the list if you need to.
- Columns will be in the same order as on screen.

Opportunity List

All Open Opportunities

New Show Totals Update Selected Close Selected

(1 of 6) 1 2 3 4 5 6 50

None Search fields Columns

	Manufacturer ↑↓	Customer ↑↓	Topic ↑↓	Follow Up ↑↓	Distributor ↑↓	Stage ↑↓	
<input type="checkbox"/>							
<input type="checkbox"/>	Acme Explosives	Ace Supply Tampa		08-18-2021	Ace Supply Tampa	Lead	Needs Review
<input type="checkbox"/>	Acme Explosives	Hajoca-Tampa N		08-18-2021	Hajoca-Tampa N	Lead	Needs Review
<input type="checkbox"/>	Grundfos	33 West Monroe Associates LLC	Scanner for Bowl Feeder	08-18-2021	United Refrigeration - Tampa	Lead	Customer Info Required

	A	B	C	D	E	F	G	H	I	J	K
	Id	Manufacturer	Customer	Topic	Follow Up	Distributor	Stage	Status	Value	Next Step	Sales Team
2	1095	Acme Explosives	Ace Supply Tampa		08-18-2021	Ace Supply Tampa	Lead	Needs Review	0.00		Chris Farley
3	1094	Acme Explosives	Hajoca-Tampa N		08-18-2021	Hajoca-Tampa N	Lead	Needs Review	0.00		Chris Farley
4	1093	Grundfos	33 West Monroe Associates	Scanner for Bowl Feeder	08-18-2021	United Refrigeration - Tampa	Lead	Customer Info Required	194400.00	Call: Delta for the Quote	Chris Farley
5	1092	Delta Faucets Inc	33 West Monroe Associates	Amalie Arena Luxury Suite Upgrade	08-18-2021	Anixter-Boynton Beach	Quote Requested	Manufacturer Info Required	40974.50	Call: Delta for the Quote	Chris Farley
6	1091	Delta Faucets Inc	33 West Monroe Associates	Amalie Arena Luxury Suite Upgrade	08-18-2021	Ace Supply Tampa	Quote Requested	Manufacturer Info Required	40974.50	Call: Delta for the Quote	Chris Farley
7	1090	Acme Explosives	Hajoca-Ft Lauderdale	funnel	08-16-2021	Hajoca-Ft Lauderdale	Lead	Customer Info Required	10501.00		Chris Farley
8	653	Acme Explosives	Graybar Tampa	22nd St. substation	08-10-2021	Graybar Tampa	Target	Customer Info Required	58698.00		Chris Farley
9	253	Mersen	Ace Boca Raton	Electric meter switch	08-10-2021	Ace Boca Raton	Sample Submitted	Customer Info Required	2002.75	Call: PP:1-2-3-4 #JC update quote	Rodney Dangerfield
10	1087	Zurn +	Buccaneer Supply Tampa	quote for 10k' pipe	08-04-2021	Buccaneer Supply Tampa	Quote Requested	Manufacturer Info Required	100000.00		Chris Farley
11	39	Lorenz	United Refrigeration - Tampa	150 unit Multifamily	08-04-2021	United Refrigeration - Tampa	Quote Requested	Manufacturer Info Required	379.20	new quotes required	Chris Farley
12	9	Acme Explosives	Tesla	2 tier boiler system	08-04-2021	Arrow Electronics	Quote Requested	Manufacturer Info Required	0.00	new quotes required #JC	Chris Farley
13	1086	Zurn +	Ferguson-Ft Lauderdale		08-03-2021	Ferguson-Ft Lauderdale	Lead	Customer Info Required	0.00		Bill Murray

# Activity Journal Export

- Use the “Export” button in top left corner.
- Enter the desired date range for export.

Activity Journal - **Chris Farley**

[New](#) [Print](#) [Export](#)

**Export type** ✕

From:  To:

Principal


File Type:  Excel  CSV

Include Header Id:

	A	B	C	D	E	F	G	H	I	J
1		RepSalesForce								Reported On: 08-12-2021 11:17 AM
2	1311 N. Westshore Blvd. Suite 100Tampa, FL 33616					Date Range: 08-01-2021 - 08-12-2021				
3	<b>Activity Journal Report for Chris Farley</b>									
4	Date	Purpose	Customer	Attendees	Call Type	General Rep Notes	Manufacturer	Comment	Follow Up	Sales Rep
5	08-12-202	Sales call with Manufacturer	Ace Supply Tampa	Darnell Jerwood	Sales call with Manufacturer		Acme Explosives	The rolling Big Firework was a h		Chris Farley
6	08-12-202	Sales call with Manufacturer	Ace Supply Tampa	Darnell Jerwood	Sales call with Manufacturer		American Standard	We discussed our new shower c		Chris Farley
7	08-12-202	Sales call with Manufacturer	Ace Supply Tampa	Darnell Jerwood	Sales call with Manufacturer		Elkay	We covered our products. No in		Chris Farley
8	08-11-202	Hajoca KC	Hajoca-Tampa N	Hogan Duddin, chris.farley@rep	Sales call		Acme Explosives	They're not really interested in	08-18-2021	Chris Farley
9	08-11-202	Hajoca KC	Hajoca-Tampa N	Hogan Duddin, chris.farley@rep	Sales call		American Standard	We discussed our Cold Saw offe	08-17-2021	Chris Farley
10	08-11-202	price check	Segue Systems	Hank Hill	Lunch and Learn		American Standard	wanted pricing on 50 units. Ga		Will Farrell
11	08-11-202	Ace Supply	Ace Supply Tampa	Darnell Jerwood, chris.farley@r	Sales call		Acme Explosives	I met with him we had an explo	08-18-2021	Chris Farley
12	08-11-202	Ace Supply	Ace Supply Tampa	Darnell Jerwood, chris.farley@r	Sales call		Bradford White	zAM_Intro Call		Chris Farley
13	08-11-202	Ace Supply	Ace Supply Tampa	Darnell Jerwood, chris.farley@r	Sales call		American Standard	We talked about Pipe Notchers.		Chris Farley
14	08-09-202	Discuss various products	Hundred Acre Wood Lumber	Tom	Sales call		Acme Explosives	We covered our products. The r		Chris Farley
15	08-09-202	Discuss various products	Hundred Acre Wood Lumber	Tom	Sales call		American Standard	No interest at this time		Chris Farley

# Quotes Export

- Use the “Export” button in top left corner.
- Enter the desired date range for export.


Companies Contacts Jobs Opportunities Quotes Activity Journals Planner Sales by Month Sales Comparison Customer Summary

## Quotes List

Summary
  Detailed
 New
Open
Export
Sync Exceptions

### Quotes Export

From

To

Export
Cancel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	RepSalesForce					Reported On: 08-12-2021 03:46 PM								
2	1311 N. Westshore Blvd. Suite 100Tampa, FL 33616				From : 01-01-2021 - To : 05-31-2021									
3	Quotes Report													
4	Quote No.	Part No.	Quantity	EAU	Multiplier	Customer	Manufacturer	Sales Team	Distributor	Secondary Customer	Quote Date	Quote Value	Customer Contact	Customer Contact Email
5	QT00000078					MOSEBACH CED	Eaton	Jane Curtain	MOSEBACH CED		05-24-2021	0		
6	QT00000077	00001254DLT	150	150	1	33 West Monroe Associates LLC	Delta Faucets Inc	Chris Farley	Advance Plumbing Supply		05-17-2021	45487.5	Bill Jackson	bill.jackson@wma33rf.com
7	QT00000077	000121DLT	150	150	1	33 West Monroe Associates LLC	Delta Faucets Inc	Chris Farley	Advance Plumbing Supply		05-17-2021	45487.5	Bill Jackson	bill.jackson@wma33rf.com
8	QT00000077	1254565DLT	25	25	1	33 West Monroe Associates LLC	Delta Faucets Inc	Chris Farley	Advance Plumbing Supply		05-17-2021	45487.5	Bill Jackson	bill.jackson@wma33rf.com
9	QT00000077	0002545DLT	150	150	1	33 West Monroe Associates LLC	Delta Faucets Inc	Chris Farley	Advance Plumbing Supply		05-17-2021	45487.5	Bill Jackson	bill.jackson@wma33rf.com
10	QT00000076	33114-00175	1	2000	1	Tesla	Acme Explosives	Chris Farley	Ace Supply Tampa		04-19-2021	4348.76	Darnell Jerwood	djerwoodfj@acehardware.com
11	QT00000076	11314-00019	1	2000	1	Tesla	Acme Explosives	Chris Farley	Ace Supply Tampa		04-19-2021	4348.76	Darnell Jerwood	djerwoodfj@acehardware.com
12	QT00000075	LK500	45	0	1	Anixter-Daytona Beach	EEMAX	Rodney Dangerfield	Anixter-Daytona Beach		04-09-2021	12655.8		
13	QT00000075	Equipment	12	0	1	Anixter-Daytona Beach	ABB	Rodney Dangerfield	Anixter-Daytona Beach		04-09-2021	12655.8		
14	QT00000074	2525-N-344SQ-2.7	400	0	1	33 West Monroe Associates LLC	Lorenz	Chris Farley			03-16-2021	1200		





# Jobs Export

- Use the Excel icon to export exactly what is on the screen.
- The drop-down in top left will help you narrow down the list if you need to.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Name	Stage	Type	Specifier	Sales Person	Category	Last Modified Date	Creation Date	Follow Up Date	Job No.	Awarded To	Awarded Date	Value	Status	City
2	UPS Campus upgrades	Bid Submitted	LEED Certification	FineLine Engineering	Chris Farley	Industrial - Warehouse	05-20-2021 07:52 AM	09-05-2019 12:30 PM	03-24-2021	983793874	ABBA Construction, Inc		190000.00	OPEN	Tampa
3	The Cloister	Bid Submitted	New Construction		Chris Farley	Multi-Residential - Condominium	07-17-2020 11:40 AM	12-11-2019 01:39 PM	07-17-2020				120000.00	OPEN	Tampa
4	Target: Zoo Build Out	Bid Submitted	Renovation	Turner Engineering	Chris Farley	Playgrounds / Parks / Athletic F	07-17-2020 11:42 AM	04-15-2020 11:29 AM	07-17-2020	123423141			95000.00	OPEN	Tampa
5	Remodel of Murphy's Irish Pub	Lighting Layout	Renovation	QUINE ENGINEERING	Chris Farley	Retail - Food Stores	07-17-2020 11:44 AM	04-22-2020 11:41 AM	07-08-2020				15000.00	OPEN	Jacksonville I
6	Carr Arena	Specifying	Addition, New Construction, Sit	A.C.M.E. Incorporated	Chris Farley		10-30-2020 01:10 PM	09-24-2020 02:16 PM	10-01-2020	DR 1029309834			0.00	OPEN	Austin
7	Islamorada Fish Company Remodel	Awarded	Renovation	Turner Engineering	Chris Farley	Retail - Food Stores	07-17-2020 11:42 AM	06-24-2020 11:35 AM	07-01-2020		ABBA Construction, Inc	07-17-2020	7500000.00	OPEN	Dania Beach
8	Cloverland - ntransformer request	Specifying	Target Account	BattleLink Group	Chris Farley	Educational - Dormitories	03-09-2021 12:13 PM	07-08-2020 11:53 AM	07-15-2020	3673889	CDM Smith Inc - Maitland		100000.00	OPEN	Ft. Lauderdale
9	Building 8 Renovation Marine Barracks W	Awarded	Renovation	Hiscutt & Associates	Chris Farley	Military - General	07-17-2020 12:37 PM	07-17-2020 12:03 PM	07-24-2020	4142811			0.00	OPEN	Washington
10	QIAGEN Campus at Germantown Busine	POs Received	New Construction, Site Work	CDM Smith Inc - Maitland	Chris Farley	Office - General, Laboratories -	07-17-2020 12:47 PM	07-17-2020 12:47 PM	07-24-2020	2406308	CDM Smith Inc - Maitland		5000000.00	OPEN	Germantown
11	Chillicothe Road Residential Subdivision	Awarded	New Construction, Site Work	SLAM Collaborative	Chris Farley	Residential Subdivision	02-26-2021 10:03 AM	07-17-2020 12:47 PM	07-24-2020	3249640	Cuhaci & Peterson / Orlando	05-30-2020	22000000.00	OPEN	Aurora
12	Loveland Family Housing	Bid Submitted	New Construction, Site Work	Tutor-Perini Building Corp	Chris Farley	Multi-Residential - Apartments	02-26-2021 10:05 AM	07-17-2020 12:47 PM	07-24-2020	3805707			985170.00	OPEN	Loveland
13	North Landing Villas Townhomes	Bid Submitted	New Construction, Site Work	Detailed Development Solutions D	Chris Farley	Multi-Residential - Townhomes	02-26-2021 10:03 AM	07-17-2020 12:47 PM	07-24-2020	3873723	Detailed Development Solutio		15000000.00	OPEN	Virginia Beac
14	Bishop Tube Residential Subdivision / M	Bid Submitted	New Construction, Site Work	Fedco, LLC	Chris Farley	Residential Subdivision	02-26-2021 10:05 AM	07-17-2020 12:47 PM	07-24-2020	3928656	Fedco, LLC		3000000.00	OPEN	Frazer
15	Westpark Golf Course Residential Subdiv	Awarded	New Construction, Site Work	RS&H, Inc	Chris Farley	Residential Subdivision	02-26-2021 10:05 AM	07-17-2020 12:47 PM	07-24-2020	4046538	RS&H, Inc		10500000.00	OPEN	Leesburg
16	Holiday Inn Express and Suites	Specifying	New Construction	ABBA Construction, Inc	Chris Farley	Hotel / Motel - Hotel/Motel	02-26-2021 10:04 AM	07-17-2020 12:47 PM	07-24-2020	4192201			6000000.00	OPEN	Plymouth Me
17	Iglesia De Dios Pentecostal Getsemani	Bid Submitted	Renovation	Menefee Architects	Chris Farley	Religious / Funeral - Place of W	02-26-2021 10:16 AM	07-17-2020 12:47 PM	07-24-2020	4199525			5000000.00	OPEN	Columbus
18	Grosvenor Place Apartments	Awarded	New Construction, Site Work, F	Firewatch Contracting of Florida Il	Chris Farley	Multi-Residential - Apartments	02-26-2021 10:17 AM	07-17-2020 12:47 PM	07-24-2020	4306142			8000000.00	OPEN	Cleveland
19	Davis Drive Apartments - Rebid	Awarded	New Construction, Site Work, F	GLF Construction Corporation - Te	Chris Farley	Multi-Residential - Apartments	02-26-2021 10:18 AM	07-17-2020 12:47 PM	07-24-2020	4381216			20000000.00	OPEN	Morrisville
20	Eastondale Cottages	Awarded	New Construction, Site Work, F	Integrated Construction, LLC	Chris Farley	Residential Subdivision	02-26-2021 10:17 AM	07-17-2020 12:47 PM	07-24-2020	4416961	Integrated Construction, LLC	12-01-2019	10000000.00	OPEN	Easton

# PO Export

- “Export” button to export by PO# or SO#
- Choose a date range to export.

	A	B	C	D	E	F	G	H	I
1	RepSalesForce							Reported On: 08-16-2021 10:43 AM	
2	1311 N. Westshore Blvd. Suite 100Tampa, FL 33616			From : 06-01-2021 - To : 08-16-2021					
3	Purchase Order Report								
4	Manufacturer	Customer	Distributor	Secondary Customer	Sales Team	PO Number	PO Date	SO Number	SO Date
5	ABB	BattleLink Group			Chris Farley	049840	06-08-2021		
6	Acme Explosives	Ace Boca Raton	Ace Boca Raton		Rodney Dangerfield	90938	06-21-2021		
7	Acme Explosives	ABBA Construction, Inc			Chris Farley	32425	06-21-2021		
8	Acme Explosives	MSC Supply	MSC Supply		Rodney Dangerfield	123412	06-21-2021		
9	ABB	Anixter-Boynton Beach	Anixter-Boynton Beach		Bill Murray	904980	06-22-2021		
10	JSM Manufacturing	AIT-Casselberry	AIT-Casselberry	BRUNSWICK WINAIR CO	Rodney Dangerfield	9049840	07-16-2021		
11	Acme Explosives	Arrow Electronics	Arrow Electronics	Tesla	Chris Farley	123456	08-02-2021		
12	Artopex +	Tesla			Chris Farley	81121	08-11-2021		

- “Export” button to export by “Source” (Invoice, PO, etc.).
- Choose a date range to export.
- Pull for specific manufacturer, customer, or sales team.
- Filter by “Unreconciled” or “Reconciled.”

# Commissionable Transactions Export

**Commissionable transactions** ✕

Source:

Transaction From:

Transaction To:

Manufacturer:

Customer:

Sales Team:

Filter by:

File Type:  Excel

Companies Contacts Activity Journals Opportunities Jobs Purchase1 Orders Planner Sales by Month

## Commissionable Transactions

View Mode:  Summary  Detailed
 Show:  Source:

AutoSave  Commission\_Report (63) - Excel Search (Alt+Q) Kim Kinmonth

File Home Insert Page Layout Formulas Data Review View Developer Help Ablebits Data Ablebits Tools

Clipboard Font Alignment Number Styles Cells Editing Analysis Sensitivity

C8 14-9987

Commission Report														
Id	Header id	Part No.	Manufacturer Name	Distributor Name	CustomerName	Secondary Customer	Sales Team	Source	Order Qty.	Shp Qty.	Shp Date.	Plnd Date.	Quote No.	Quote Date
Reported On: 11-15-2021 01:54 PM														
1311 N. Westshore Blvd. Suite 100 Tampa, FL 33616 Date: -														
4	13		Southwire +	Ace Supply Tampa	Ace Boca Raton		Team Rodney Dangerfield	INVOICE	1	0				
6	781	13	Southwire +	Ace Supply Tampa	Ace Boca Raton		Team Rodney Dangerfield	INVOICE	0	0				
7	14	14 14-9987	Allseating	Ace Coral Gables	Ace Coral Gables		Team Barney Rubble	INVOICE	100	100				
8	49	49 14-9987	Allseating	Ace Boca Raton	Ace Coral Gables		Team Barney Rubble	INVOICE	1	20				
9	50	50	Allseating	Ace Supply Tampa	Ace Supply Tampa		Team Chris Farley	INVOICE	1	0				
10	119	119	Southwire +		AdvancePierre Foods		Team Chris Farley	INVOICE	1	0				
11	120	120	Legrand	AIT-Tampa-HQ	AIT-Tampa-HQ	Jabil Panang	Team Rodney Dangerfield	INVOICE	1	0				
12	121	121	Legrand	Ace Supply Tampa	AIT-Gainesville	Jabil Panang	Team Chris Farley	INVOICE	1	0				
13	122	122	Southwire +		AdvancePierre Foods		Team Chris Farley	INVOICE	1	0				
14	123	123	Southwire +		AdvancePierre Foods		Team Chris Farley	INVOICE	1	0				
15	124	124	JPW +	AIT-Casselberry	AIT-Casselberry		Team Rodney Dangerfield	INVOICE	0	0				
16	125	125	Allseating	Ace Boca Raton	Ace Boca Raton		Bill Murray	INVOICE	0	0				
17	126	126	Allseating	Ace Boca Raton	Ace Boca Raton		Bill Murray	INVOICE	0	0				

- Choose “Invoice” or “PO.”
- Choose a date range to export.
- Pull for specific manufacturer, customer, or sales team.
- “Hide records for which commissions received” if you want to exclude paid items.

# Backlog Report

Companies Contacts Activity Journals Opportunities Jobs Purchase1 Orders Planner Sales by Month

Commissionable Transactions

New Bulk Reconcile Archive Export Quick Entry **Backlog Report**

View Mode  Summary  Detailed Show All Source Purchase Order

**Backlog Report**

Source [SELECT]

From

To

Sales Team [ ] Clear

Manufacturer All

Customer All

Hide records for which commissions received

Export View

Manufacturer	Customer	Current Sales Team	Original Sales Team	PO No.	Invoice No	PO Date	Invoice Date	Part Number
JSM Manufacturing	Frankton Mint inc.	Team Rodney Dangerfield	Team Rodney Dangerfield		jsm.101421.1	04-03-2022		4135
JPW +	Hajoca-Boca Raton	Bill Murray	Bill Murray		20211031-1		10-31-2021	
JPW +	Hajoca-Boca Raton	Bill Murray	Bill Murray		20211031-2		10-31-2021	
JSM Manufacturing	Tiny Tim's Turtles	House	House		10142021		10-14-2021	
Ametek Company	Acme Inc.	Team Chris Farley	Team Chris Farley	PO 00090	102121A	09-21-2021	10-21-2021	DCS 40-30EM130
Ametek Company	Acme	Team Chris Farley	Team Chris Farley	PO00000088	102121A	10-21-2021	10-21-2021	XG100-17MGA
Ametek Company	Acme	Team Chris Farley	Team Chris Farley	PO00000088	102121A	10-21-2021	10-21-2021	SGI 800X6C-1CAA
Ametek Company	Acme	Team Chris Farley	Team Chris Farley	PO00000088	102121A	10-21-2021	10-21-2021	XG100-17MGA
Ametek Company	Acme	Team Chris Farley	Team Chris Farley	PO00000088	102121A	10-21-2021	10-21-2021	SGI 800X6C-1CAA
Ametek Company	Acme	Team Chris Farley	Team Chris Farley	PO00000088	102121A	10-21-2021	10-21-2021	XG100-17MGA
Ametek Company	Acme	Team Chris Farley	Team Chris Farley	PO00000088	102121A	10-21-2021	10-21-2021	SGI 800X6C-1CAA

# Custom Reports - PBI & LR

# Living Report

- Create your own ([Click here to view tutorial](#)) or have a complimentary report created by us.
- Use for Ajs, Opps, Samples, Pos, user login history or commissions.



## Monthly Opportunities

Creation Date	Modified Date	Manufacturer	Customer	Sales Team	Distributor	Customer Type	Topic	Owner
2021-08-16	2021-08-16	US Floors	33 West Monroe Associates LLC	Chris Farley		Architect	Amalie Arena Flooring Upgrade	Chris F
2021-08-12	2021-08-12	Acme Explosives		Chris Farley	Ace Supply Tampa		kim test Marr	Chris F
2021-08-11	2021-08-11	Artopex +	33 West Monroe Associates LLC	Chris Farley	United Refrigeration - Tampa	Architect	Amalie Arena Luxury Suite Upgrade	Chris F
2021-08-11	2021-08-11	Acme Explosives		Chris Farley	Ace Supply Tampa			Chris F
2021-08-11	2021-08-11	Acme Explosives		Chris Farley	Hajoca-Tampa N			Chris F
2021-08-11	2021-08-11	Delta Faucets Inc	33 West Monroe Associates LLC	Chris Farley	Ace Supply Tampa	Architect	Amalie Arena Luxury Suite Upgrade	Chris F
2021-08-11	2021-08-11	Delta Faucets Inc	33 West Monroe Associates LLC	Chris Farley	Anixter-Boynton Beach	Architect	Amalie Arena Luxury Suite Upgrade	Chris F
2020-10-06	2021-08-10	Mersen		Rodney Dangerfield	Ace Boca Raton		Electric meter switch	Chris F
2020-08-19	2021-08-10	Acme Explosives		Chris Farley	Graybar Tampa		22nd St. substation	Chris F
2020-08-04	2021-08-10	OM Seating +		Chris Farley	Buccaneer Supply Tampa		Navien conversion	Chris F
2021-08-09	2021-08-10	Acme Explosives		Chris Farley	Hajoca-Ft Lauderdale		funnel	Chris F
2021-08-09	2021-08-09	Enwork +	Airgas	Barney Rubble	AIT-Tampa-HQ	Distributor	Tyson Foods Line 2 job [JOB]	Admin
2021-07-28	2021-08-03	OM Seating +		Chris Farley	Buccaneer Supply Tampa		quote for 10k' pipe	Chris F
2020-10-29	2021-07-29	Acme Explosives		Chris Farley	Ace Supply Tampa			Chris F
2019-08-05	2021-07-28	Acme Explosives	Tesla	Chris Farley	Arrow Electronics	OEM	2 tier boiler system	Jane C
2019-08-30	2021-07-28	Lorenz		Chris Farley	United Refrigeration - Tampa		150 unit Multifamily	Will Fa
2020-09-09	2021-07-27	OM Seating +		Chris Farley	United Refrigeration - Tampa		Mercy hospital	Chris F

# MS Power BI

- Connect your data to the updated PBI ([Click here to view tutorial](#)).
- 35+ different tabs with detailed information.
- Customized reports available as a professional service.

