

Sales Results Net New (Analysis) - Screen Enhancements (15875)

Last Modified on 12/22/2023 3:51 pm EST

The following changes have been applied to the Sales Results Net New screen:

1. Filter labels have been relocated to display above the filter they are associated with.
2. A new 'Based On' filter has been added with 'Effective Date' and 'Posted Date' filter options.
3. The 'Type' filter has been renamed to 'Range,' and can now be filtered by Month and Year with the Period filter.
4. A 'Period' label has been added above the Period filter, and the former drop-down option was replaced with a calendar picker.

Additional changes:

1. In Setup > System > System Options > Sales (tab), the 'Results Based On' field has been removed.

SALES RESULTS NET NEW										REPORTS > ANALYSIS > SALES RESULTS NET NEW	
RANGE	PERIOD	BASED ON	DIVISION	LINE OF BUSINESS							
Period	Dec 2023	Effective Date	All	All							
GROUP BY Sales Rep											
	NEW	INCREASES	GROSS TOTAL	CONTROLLABLE	NON-CONTROLLABLE	DECREASES	NET TOTAL	TEMP / SEASONAL	1085		
Ken Smith	\$ 100.00 3 (2 Sites)	\$ 0.00 0 (0 Sites)	\$ 100.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 100.00	\$ 0.00 0 (0 Sites)	N/A		
Dana Pate	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0 (0 Sites)	N/A		
Dave Peters	\$ 1,899.00 4 (3 Sites)	\$ 783.00 2 (2 Sites)	\$ 2,682.00	\$ 0.00 0	\$ 0.00 1	\$ 0.00 0 (0 Sites)	\$ 2,682.00	\$ 0.00 0 (0 Sites)	(-42.6096%)		
House Account	\$ 0.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 0.00	\$ 0.00 0	\$(230.20) 2	\$ 0.00 0 (0 Sites)	\$(230.20)	\$ 0.00 0 (0 Sites)	0%		
Natalia Jones	\$ 0.00 0 (0 Sites)	\$ 7.00 1 (1 Sites)	\$ 7.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 7.00	\$ 0.00 0 (0 Sites)	N/A		
Alice Watters	\$ 0.00 0 (0 Sites)	\$ 10.00 2 (1 Sites)	\$ 10.00	\$ 0.00 0	\$(200.00) 2	\$ 0.00 0 (0 Sites)	\$(190.00)	\$ 0.00 0 (0 Sites)	3.5842%		
Jeff Johnson	\$ 3,000.00 1 (1 Sites)	\$ 0.00 0 (0 Sites)	\$ 3,000.00	\$ 0.00 0	\$ 0.00 0	\$ 0.00 0 (0 Sites)	\$ 3,000.00	\$ 0.00 0 (0 Sites)	N/A		