



## New Features

### **Exports Report #810 - Sales Report by Rep to Excel**

07/31/2008 - Yellow Magic has programmed several new reports which were a part of the V2.1 Release. We want to make sure our customers know what is available and reports seem to get overlooked. There are now over 240 reports which can easily help you report and in many cases now export the data you want.

### **Today's Feature Report – Exports / #810 Sales Report by Rep to Excel**



Sales Managers will love this new report, #810 - Sales Report by Rep, which is exported directly to your Microsoft Excel program. This report provides you with sales tracking tools such as start and end dates for your sales canvass, how many days in the canvass have passed and how many are remaining.

This report gives you the ability to see a summary view or a detailed view for one or all of your sales reps. The detailed version will list all the accounts that have been closed/retired in Yellow Magic as of the date it is being run. Some of this information will be \$\$ assigned, \$\$ retired and \$\$ remaining to sell. It tells you what category those dollars went to; renewal, increase, cancelled and gain/loss \$\$ . Most of this information will also be given to you in percentages. But, the real attraction to this report is the pie charts! The pie charts allow you to see how the sales reps are performing based on the overall canvass duration, their remaining workload and sales categories at a quick glance.

To use Export Report #810 you will need to fill in canvass start and end dates which are located under Maintenance/Books. Each book when you choose Edit will have a Canvass Tab where you will fill in that books canvass start and end dates. You must have MS Excel installed on the machine running the report as well.

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