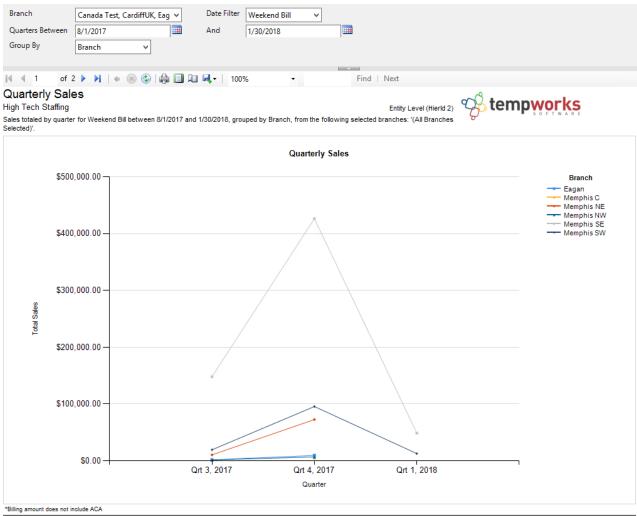# Quarterly Sales Report

Last Modified on 03/15/2018 8:24 am CDT

Quarterly Sales

Purpose: This report breaks down total sales by quarter for a customer, branch, sales team etc., which can be specified by the 'group by' parameter. We first show the sales in a graph format and display the additional details in a matrix format on the following pages. This report is a great tool for getting a snapshot of the trends in your company's sales cycle. The information is pulled directly from the transaction record. Therefore, the sales team and the rep are also the sales team and rep from the assignment the time the transaction was processed.

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Branch	Qrt 3, 2017	Qrt 4, 2017	Qrt 1, 2018
Eagan	$1,954.50	$9,503.00	
Memphis C		$5,040.00	
Memphis NE	$10,600.40	$72,685.66	
Memphis NW	$1,765.28	$6,909.57	
Memphis SE	$148,204.22	$426,339.72	$48,755.82
Memphis SW	$19,505.99	$95,649.36	$12,801.13
Totals	$182,030.39	$616,127.31	$61,556.95

*Billing amount does not include ACA

Parameters:

1. Branch: A drop-down list of all branches in the user's current hierarchy. It is a multi-value parameter so they
can select either all branches, just one specific branch, or any combination of different branches in the list.

2. Date Filter: A drop-down determining what field your date range filters on.

   a. Weekend Bill of the transaction

   b. Weekend Date of the transaction

   c. Invoice Date of the transaction

3. Quarters Between: Starting date of your desired date range beginning within a specified quarter.

4. And: Ending date of your desired date range ending within a specified quarter.

5. Group By: A list of different fields to group the data into within the report. It has the following options:

   a. (no grouping)

   b. Employee

   c. Customer

   d. Branch

   e. Sales Team

   f. Rep

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