Henderson Sales Report Form

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Executive Summary

Business Description

The Sales Representatives at Henderson, a regional truck and auto part retailer, are required to submit a Monthly Sales Report. These reports are all turned in to the Sales Manager and VP of Sales. The Sales Representatives are to report on who they visited or called, what they talked about, and highlight anything that they feel needs to be brought up to the Sales Manager or VP of Sales.

Business Issue

Because Henderson is a smaller regional company, the owners have not invested in a lot of technology. This leaves a lot of functions to be done with paper and pencil. The Monthly Sales Report is one of these functions. To fill out these reports takes close to 20 hours to fill out correctly. This is a lot of time, especially to a sales representative who is paid on commission. The more time they take to fill out these reports, the less time the sales representatives have at visiting customers.

Solution

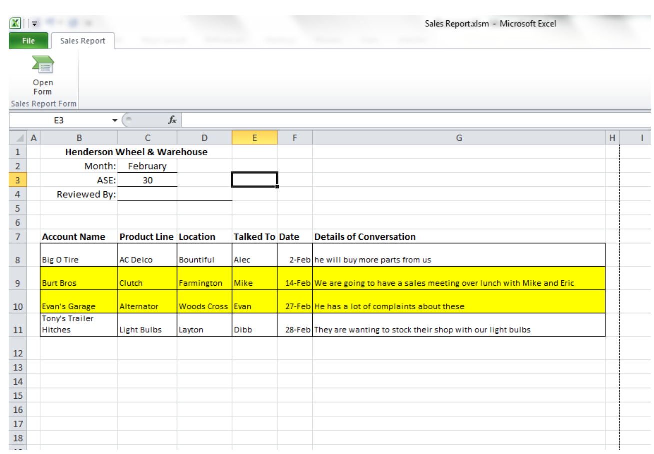
To help the sales representatives spend less time writing their reports, I decided to create a way so the sales representatives could fill the reports out on a computer in order to save time. I did this by creating a form in excel that they can use to put in their information for the month. This form allows them to quickly fill in their report by using dropdown menus, list boxes, and check boxes to fill in a majority of their information. They only need to type in one or two bits of information to create one line in their report. Most of the sales representative that would use this form would not have a lot of technical knowledge so I created the workbook so everything could be down in the form. Also the only option in the ribbon they have access to, is a button that will bring up the form. Also in the form I have automated the formatting and printing of the report all in one button. After they are done inserting their information then they click the print button and select their printer and print.

By using this form the sales representatives at Henderson can save time filling out reports and more time taking care of customers.

Implementation Documentation

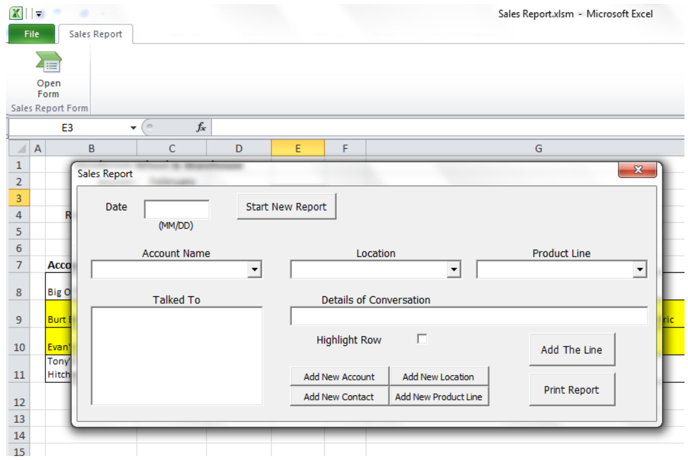
Initial Screen

When the excel file first opens, the screen will be the Sales Report worksheet. You will see the last saved Sales Report. This initial worksheet is where the information is placed and formatted to be included into the Sales Report. To make this file easy to use for someone that is not technical, I made it so the only tab that is available on the ribbon is one called "Sales Report". In that tab the only button that is available is one called "Open Form". The "Open Form" button opens the form and allows the user to begin creating a new Sales Report.



Open Form Button

When the Open Form button in the ribbon is clicked, the Sales Report Form opens. The screenshot shows what happens when the button is clicked.

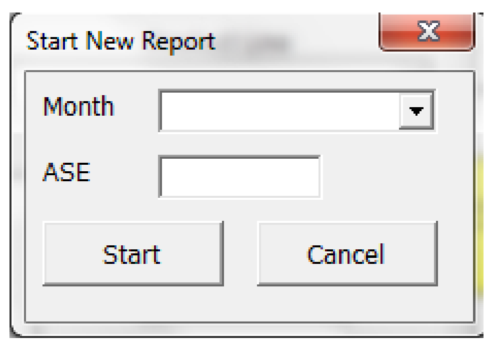


Main Sales Report Form

The Main Sales Report is the main dashboard that the users will interact with. From this main dashboard they can add information to the Sales Report, add new accounts and product lines, and format and print their report. When the user first opens this form to begin a new sales report. The user must first press the Start New Report button. I linked this Start New Report button to the New Report Form. I did this because there are some information that applies to the Sales Report as a whole instead of by each line of data. I felt it was best to have a New Report Button.

Start New Report Button

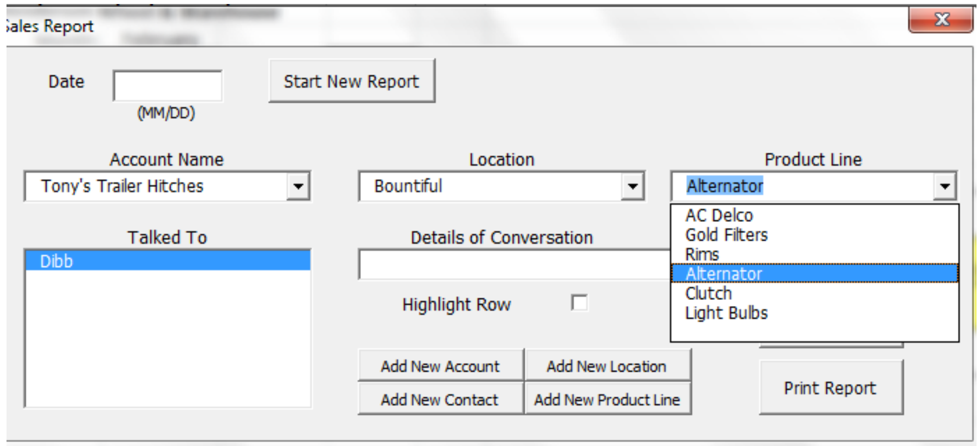
The Start New Report Button takes the user to the New Report form. This form is pretty simple and is mainly used to delete the old Sales Report and insert a new worksheet and begin formating the header of the report. All the formatting and creating a new Sales Report tab is done behind the sceanes and is prompted to by the user. The only thing that the user needs to input is specific information regarding that new Sales Report. The two things are The month, which is put in a dropdown box to make it easier for the user to fill out, and the ASE number.

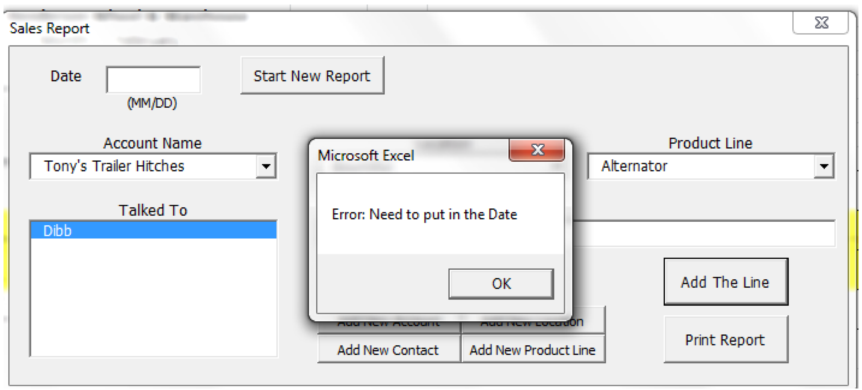


The ASE number is a unique identifier for the that sales representitive. When the user has filled in the desired information, they will click on the Start Button. This button will then delete the old Sales Report, create A new Sales Report, Format and insert the two pieces from the form to the new Sales Report, and take the user back to the Main Sales Report Form. If the user clicked on the Start New Report button on accident then they can click cancel and it will exit the Start New Report Form and go back to the Main Sales Report Form.

Main Sales Report Form Filling Out Data

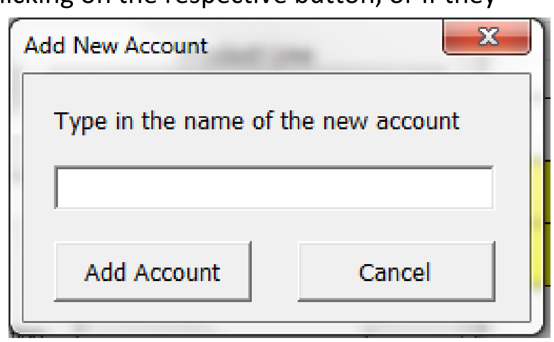
After the new report has been created the user will then start entering each line of data for their report. All the information that is required in the Main Sales Report Form is the same fields of information that is required on the paper version that Henderson now requires. The User will fill out the date of visit in the date box, then go to the Account Name. After the user selects the account name, a list of contacts will appear in the Talked To list box. These are the contacts that are specific to the account. After the user selects the contact in the Talked to box they will continue on and select the Location of the account and the product line that was talked about from drop down menus. The next step for the user would be to write in a description of what was talked about. This is a textbox that the user can write in, but to keep the user from writing too much I included a character limit in the settings of the textbox . After writing information in the textbox the user now has the option to decide whether to have this line be highlighted or not. If the user wants the line highlighted, they would just need to check the highlight checkbox. To add this to the new report, the user would just have to click the "Add The Line". There are certain bits of information that is required for each line item, and some that are not. For the required lines the user can not add a new line and a message box will appear telling them what field they need to enter to add the line to the report. After the "Add The Line" button is pressed all information in the Sales Report Form will be entered to the New Sales Report and then cleared out of the Sales Report Form so more lines can be entered into the report.





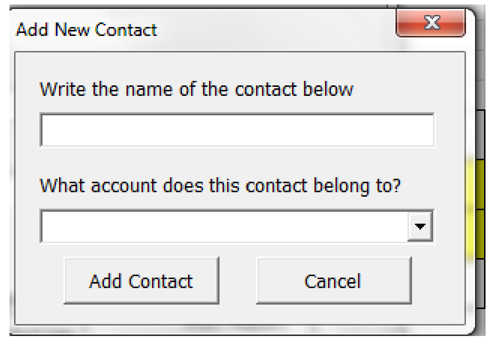
Add New Account/Location/Product Line Buttons

If the user has a new Account, Location, or Product Line that they talked to and want to report on, then they can add this new Account, Location, or Product Line by clicking on the respective button, or if they don't want to save the new Account, Location, or Product Line then they can just type the name in and it will go to the Sales Report but it won't be saved in the drop down menu. By clicking on one of the "Add New" buttons the user will be able to add new information to the dropdown menus. The Buttons are very simple and look the same for the Account, Location, and Product Line. This screenshot is an example of the New Account form but all three look the same other than Account it says the repective field. The user would type the new item in the blank text box and then click Add. This will add the new item to the dropdown menu and go back to the Main Sales Report form. If the user types in an item that is already in the dropdown menu then they will get a message that it already exisits. If the user accidentaly clicked on the Add New buttons they can click cancel and will go back to the Main Sales Report Form.



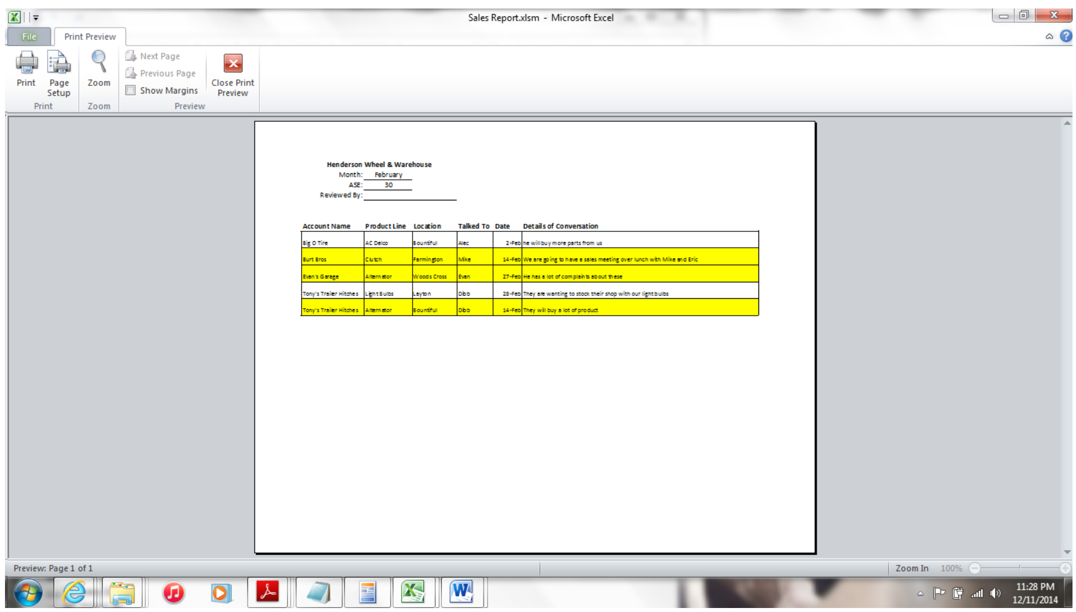
Add New Contact Button

The Add New Contact Button is very similar to the other "Add New" buttons how ever there is one other bit of information that needs to be entered. Since the contacts are associated to the Accounts. The New Contact has to be assigned to a Account Name. Once a contact is typed in the text box and an account is selected the user clicks "Add Contact" and the new contact will appear in the list box when the Account is selected on the Main Sales Report Form.



Print Report

Once all the lines of information has been entered in the Sales Report, the user can then click the "Print Report Button". This button will format all the inserted lines of data, highlight the lines that need to be highlighted, and take the user to the print preview screen. The formating that goes on in the code and to the final sales report is adding boarders, changing font size, highlighting, deleting columns, altering the width of columns and height of rows. Once all the formating is finished the user will end up at the print preview screen and can decide to print the report or go back to the excel file and add more information. This should make everything easy to create and print the Monthly Sales Reports.



Discussion of Learning and Conceptual Difficulties

This project helped me learn how to use userforms a lot more. When we went over forms in class I didn't really understand how to get forms to intereact with each other and had a hard time connecting forms. Doing this project I was able to create a number of forms that were able to communicate with eachother. I also gained an understanding of what goes on in forms to makethem work right. I thought you could only change or update information on a form by clicking a button or option button, but through this project I learned that you can have a sub run automatically when you change an option in a dropdown menu. This helps me see that there are a lot of possibilities when it comes to forms.

Another thing that I learned and had a hard time dealling with at times was the trying to fool proof my forms. I'm not super technical with computers but I'm not bad with them, so when I was trying to make the forms easy for a non-technical person or someone will limited understanding to use. I really had to think how each thing could get broken or how someone could skrew up the code somehow. When I thought about that I had to install some data validation parts in the code. I never realized the amount you need to do to make a code fool proof.

An issue that I faced that was pretty difficult for me to figure out was how to get the right lines to be highlighted. I didn't want to highlight the whole line because I wanted there to be white space on the sides of the report boarders. So I had to come up with a round about way to get what I wanted highlighted. I made it so if the highlight checkbox was marked an x would appear a couple columns away from the main data but on the same line. When I would go to format the report, I did a loop and an if statement to look for the x and then it would highlight that line but I new what columns to highlight so I made it only do those columns.

Also another issue that I ran into was when the form would take the user to the print preview screen it would freeze and end up breaking my code for some reason. I thought it was a fluke but I tried it a number more times and it did the same thing. I searched google for answers but didn't find any. Then with some trial and error of messing around the code I figured out that I needed to hide the form before the user is taken to the print preview screen.

Assistance

The only assistance I got was from the internet and the textbook, and it was for basic understanding issues of how forms or loops are constructed.