



V4 SQL

Dashboard Features

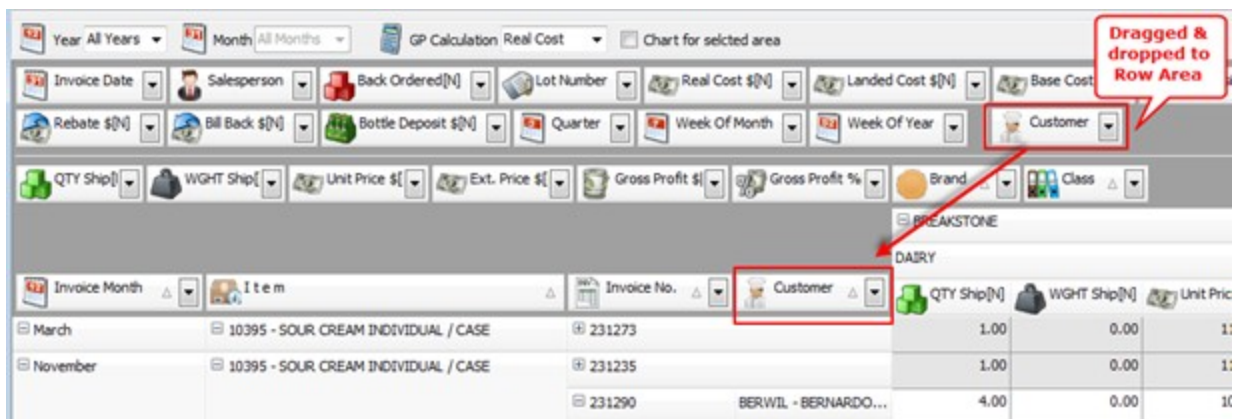


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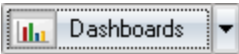

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2 Using Dashboards

entrée Version 4 introduces the **Dashboards** feature that we built from the ground-up and was made possible by our move to the SQL database platform. Dashboards are the ultimate tool for organizing and analyzing your business data.

The actual term for our dashboards is called a "Pivot Grid" or "Pivot Table", which is commonly used in business intelligence software. This tool helps the user recognize data patterns that help to build advanced data models quickly. With pivot tables, users can define and store sets of categories, then change views by dragging category names with the mouse. This core functionality provides the model for pivot tables which we have embraced in the **entrée V4 SQL Dashboards**. It provides a highly flexible means for a food distributor to analyze and grasp trends from the mountains of complex data which is normally lost by simply printing reports.

You will find a **Dashboards**  or **Sales**  button integrated into the Inventory, Customer, Vendor, Salesperson, Brand and Class File Maintenance screens. The main function is to summarize large amounts of information and represent it in a cross-tabulated form.

For instance, you can analyze sales during specific periods (years, quarterly intervals, months, weeks) for each customer, item, vendor, salesperson, brand or class, many of the dashboards include "drill down" features which allow you to see specific information, such as all the line items of a selected invoice.

The dashboards allow you to visualize your data by summarizing into different charting diagram styles including: pie charts, line charts, bar charts and area charts.

Dashboards have an interactive control, permitting you to easily reorganize and modify the layout using drag-and-drop. As a result, your business data will be re-summarized according to the new layout of the column and row fields, so an end-user can easily alter a report to display the information they need in the way they need it. Your dashboard configurations can be saved and loaded for sharing with other users in your company.

The **Dashboards** feature includes full reporting capabilities, so you can easily print to paper or export to Excel or HTML. Advanced data filtering is also provided for more sophisticated users.

The following topics are covered in the rest of this chapter to fully demonstrate the use of dashboards within the system.

- [Dashboard Features](#)
- [Inventory Dashboards](#)
- [Brand Sales Dashboard](#)
- [Class Sales Dashboard](#)
- [Customer Dashboards](#)
- [Vendor Dashboards](#)
- [Salesperson Dashboards](#)
- [Summary Dashboards](#)

2.1 Dashboard Features

- **Dashboard Menus**

Many dashboards in **entrée version 4** have a drop down menu arrow on the **Dashboards** button to access the dashboards specifically designed for the Inventory, Customer, Vendor, Salesperson, Brand and Class Files. These custom menus will be discussed later in this document.

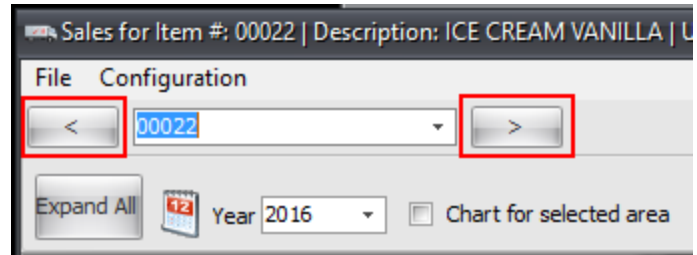
• Unique Data Icons



Our dashboard design includes unique icons for each type of data so they can easily be recognized.

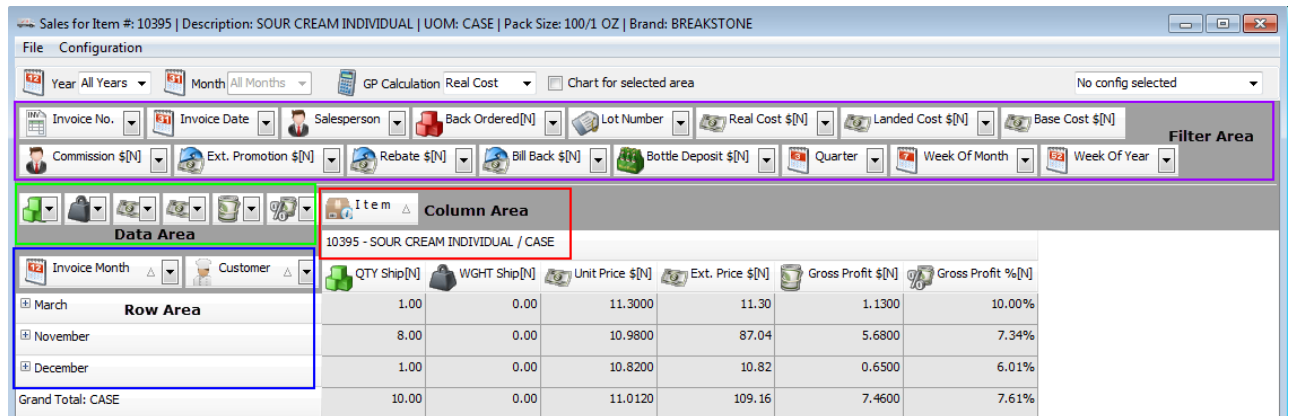
• Navigation

Using left and right arrows provide the ability to move between different entries in the dashboard without having to close the current dashboard.



• Dashboard Pivot Grid Areas

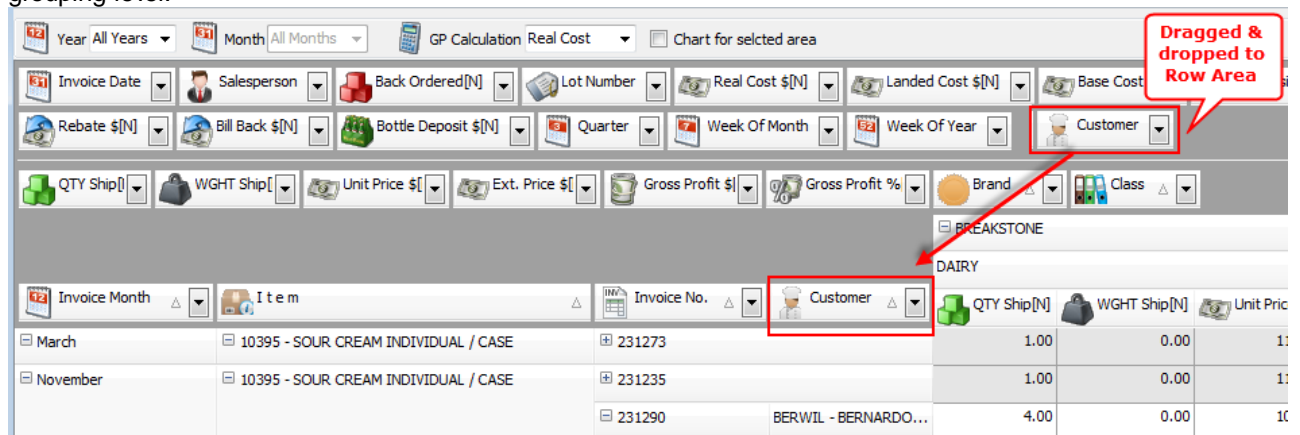
- **Filter Area** - Stores the data available for use in the grid.
- **Column Area** - Data here will be in the columns of your chart.
- **Row Area** - Data here will be populated the rows of your chart.
- **Data Area** - This is the data you selected to analyze and run in your chart.



• Drag, Drop, Sort & Group Data

Easily drag and drop data from the **Filter Area** at the top of the screen into the **Row Area** to sort by those fields. Or drag a field into the **Column Area** or **Data Area** to analyze those numeric fields to see different data patterns.

Example In the example below the **Row Area** contained Invoice Month, Item, Invoice Number. Then we clicked the "Customer" in the **Filter Area** and dragged it to the **Row Area** to add "Customer" as the fourth grouping level.



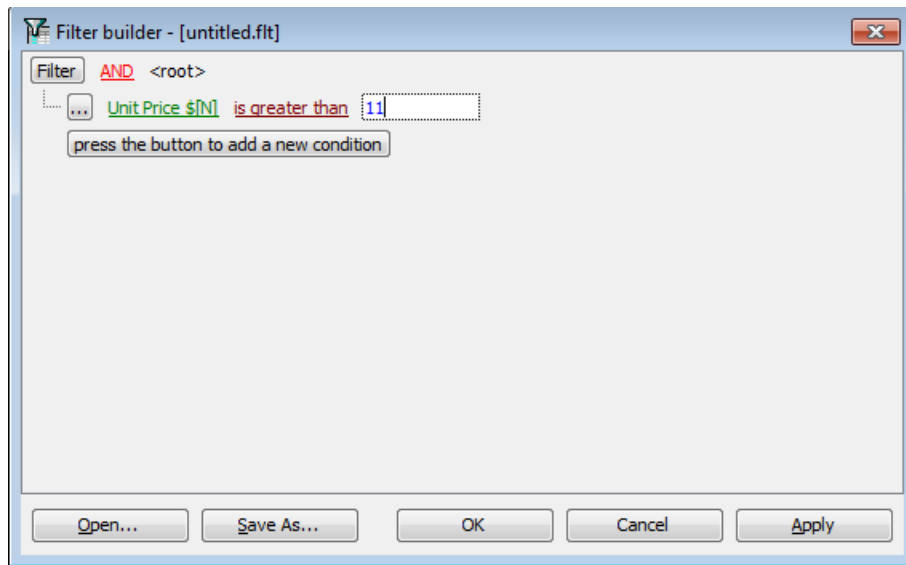
• PivotGrid Data Pre-filter Feature



Click the **Pre-filter** button, on the right side of the Prefilter bar area, to access the **Filter builder** dialog (see the following Data Prefilter section). The **Filter builder** dialog is where you can select a Group (data) to be pre-filtered with conditions to further restrict the data you analyze in the dashboard.

Right click on the **Group**, **Condition** or **Value** text box to make a selections from the list. The **Group** list for inventory is on the right.

In this **Filter builder** example the pre-filter of Unit Price is greater than 11 has been created. Click Save As to save for reuse. You can see the results of this filter on the Inventory Sales dashboard in the following Data Prefilter section.



Click to access the Add Condition, Add Group and Remove Row options.

- **Apply:** Pre-filters can be applied to a dashboard and not saved but will only be available while you are in the current dashboard session.
- **Save As:** Pre-filters can be saved with a name for future use. You must create a folder on your computer to store your saved Prefilter during the saving process.
- **Open:** Used to locate and open saved filters for the current dashboard.
- **Prefilter Controls:** On the left side of the Prefilter bar area is where you can select from the applied prefilters or click the red X box to remove the pre-filters completely from the data in the dashboard (see the following Data Prefilter section).

• PivotGrid Data Prefilter Feature

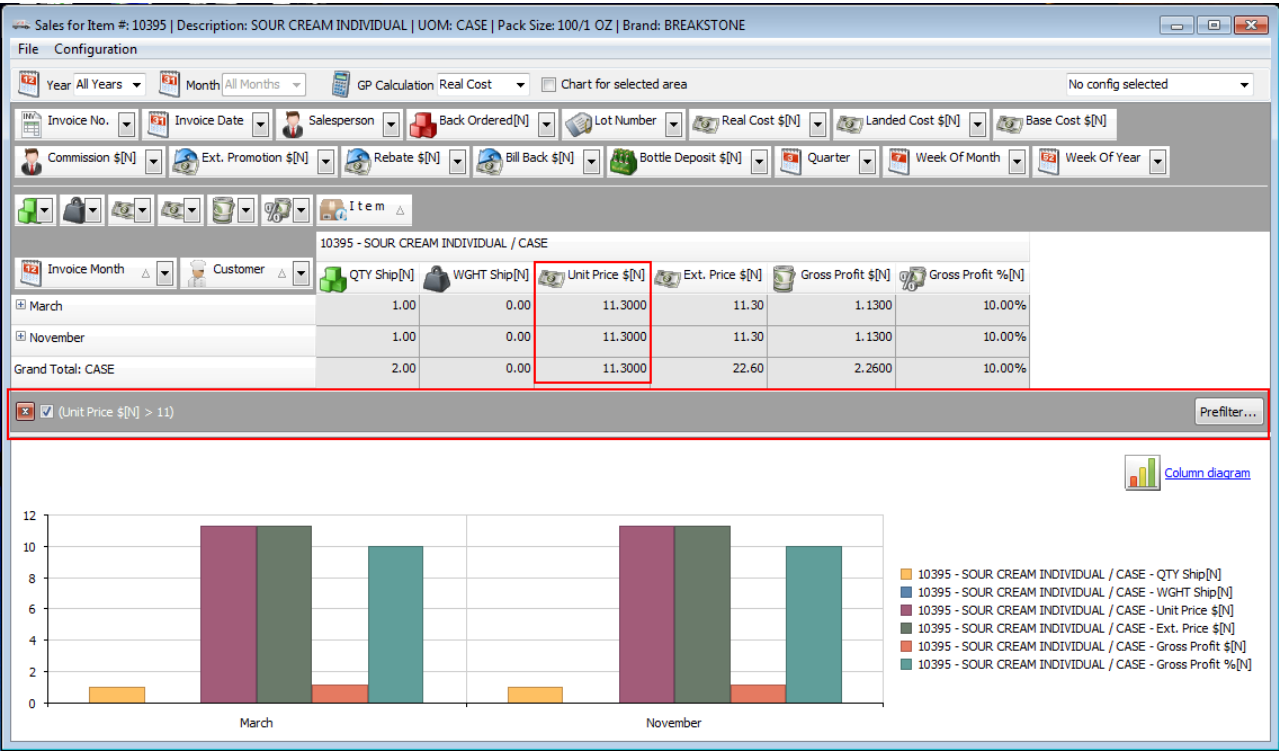
The Prefilter bar area, outlined in red, is where you create, save and control your prefilters.



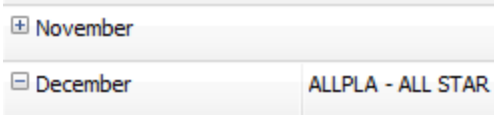
Clicking the **Prefilter** button on the right side of the Prefilter bar opens the **Filter builder** dialog as described on the previous page.


Example Inventory Sales

The prefilter of “Unit Price greater than 11”, (shown in the previous section), has been applied to the item. The Data Area **Unit Price** column and the Column diagram chart below reflect the prefiltered conditions.

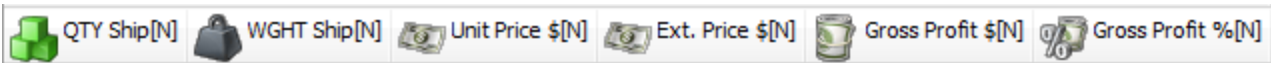


- **Row Controls:** Row data hierarchy can be expanded or collapsed using the plus or minus button.



- **Sort Controls:** The Sort arrow button on the right side of the Filter data and Row data controls sort in ascending or descending order as desired. 

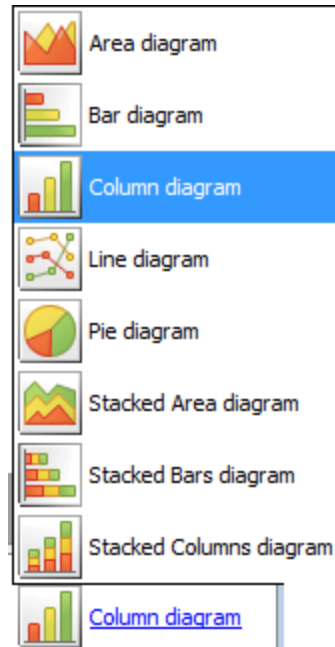
- **Numeric Data:** If a data group has an “[N]” following the data name this means it is numeric and follows those constraints in the **entrée** system. Sort results will reflect the same constraints.



• Multiple Charting Style Options

Generates a diagram to visualize your data using any one of eight different chart styles for the Summary Chart including:

- Area
- Bar
- Column
- Line
- Pie
- Stacked Area
- Stacked Bar
- Stacked Columns

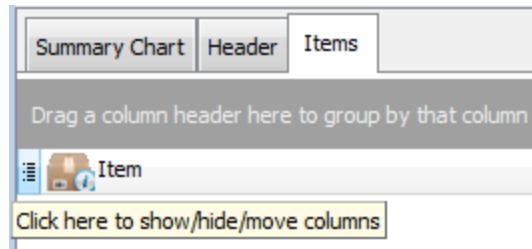


• Diagram Area Options

The Diagram area not only generates the **Summary Chart** but for some customer and salesperson dashboards there are additional menu and grouping options.

Header: Shows the header details for the selected. See the Customer Sales Dashboard in the Customer Dashboard section of this chapter for an example.

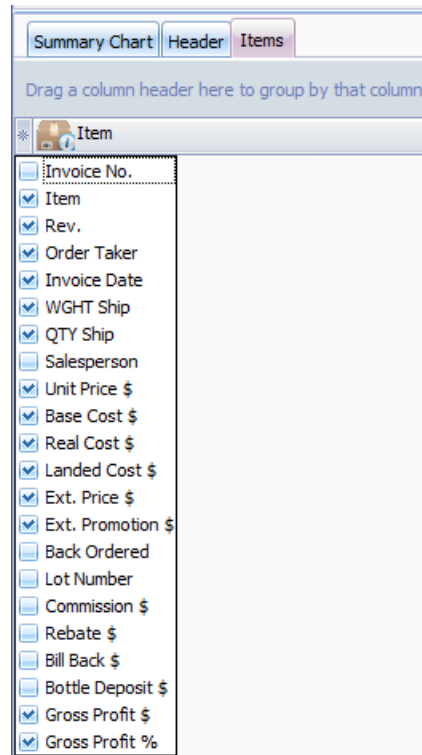
Items: Shows item details for selected customer, salesperson or invoice number. See the Customer Payments Dashboard in the Customer Dashboard section of this chapter for an example.



Drag a column header here to group by that column: Drag any field from the columns listed in the diagram area to the gray drag to bar to group data by that column.

Click here to show/hide/move columns:

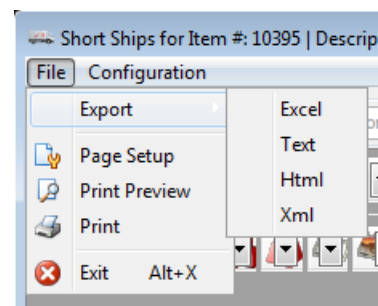
- Click the icon to open the drop down list of columns in the diagram area.
- Check columns to add them to the column list.
- Uncheck columns to remove the column from display.
- Drag columns to new positions in the column list to rearrange them for your needs.



• **Export / Print Dashboard Reports**

From the **File** menu you can Export or Print a hard copy of your dashboard analysis.

Export: Once you have done your analysis in a dashboard you can export the data to Excel, Text, HTML or XML using the **File** menu. > **Export** menu path.



Exporting Reports to Excel

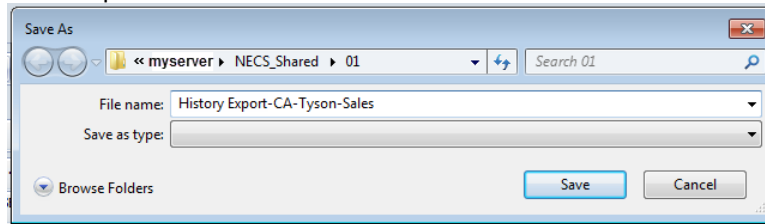
1. Use menu path: **File > Export > Excel**.

2. The **Save As** dialog box will open. It will be pointing to your **NECS_Shared** folder for the 01 company.



Hot Tip! On the **Save As** screen is a **Hide Folders** button when enabled the dialog screen below is what you will see. You will normally see the **Browse Folders** screen with all the drives and folders listed on the left as you have seen many times before.

3. **File Name:** Enter a meaningful file name for your report. The system automatically wrote “History Export” in the file name field when it opened.



To make the file name more meaningful we added “CA”, our Salesperson’s initials, “Tyson”, the brand selected in the Brand dashboard and Sales.

4. **Save as type:** You do not have to make any selection it knows your selection from the main menu.
5. Click **Save** and in the background the report is exported as an Excel file to the designated folder.
6. Now use Excel to access the report data.



Example Brand Sales Report

The report example below was created in the Brand dashboard to show sales figures for “Tyson” brand items for our salesperson Chris.

Invoice No.	Invoice Date	Back Ordered[N]	Lot Number	Real Cost \$[N]	Landed Cost \$[N]	Base Cost \$[N]	Ext. Promotion \$[N]	Rebate \$
QTY Ship[N]	Commission \$[N]	Unit Price \$[N]	Ext. Price \$[N]	Gross Profit \$[N]	Gross Profit %[N]	Brand		
TYSON								
Salesperson	Item	QTY Ship[N]	Commission \$[N]	Unit Price \$[N]	Ext. Price \$[N]	Gross Profit \$[N]	Gross Profit %[N]	
CA - Chris Anatra	2044515 - CHICKEN BREAST STRIP W/GRILL MARKS / CASE	1	0	32.09	32.09	\$3.09	9.63	
	204593 - CHICKEN WINGS BONELESS HONEY BBQ / CASE	1	0	44.9	44.9	\$4.70	10.47	
	20470 - CHICKEN WINGS BUFFALO HOT / CASE	1	0	44.1	44.1	\$3.65	8.28	
	204919 - CHICKEN WINGS BREADED BONELESS / CASE	4	0	32.71	130.84	\$11.84	9.05	
CA - Chris Anatra Total		7	0	38.45	251.93	\$23.28	9.3575	
Grand Total		7	0	38.45	251.93	\$23.28	9.3575	

• Custom Dashboard Configurations

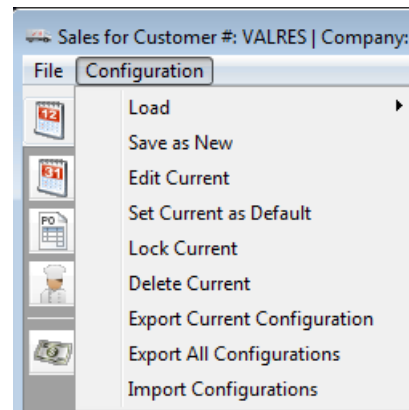
entrée provides default configurations for all dashboards. You are encouraged to customize dashboard analysis and save those custom configurations to fit your business needs.

Saving dashboard configurations you have customized will allow you to more quickly access the vital information to keep on top of activity in your business.

Each dashboard screen has the **Configuration** option in the menu in the top left side of the screen.

Managing Dashboard Configurations

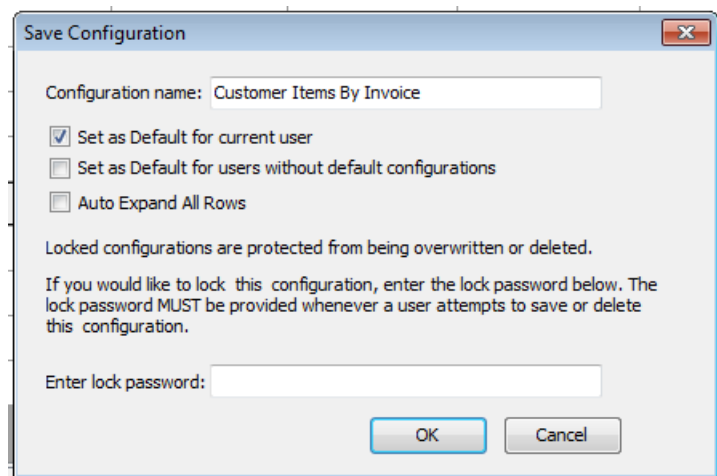
Once you have spent the time to customize a dashboard and want to save that custom configuration for reuse click the **Save as New** option in the Configuration menu.



In the **Save Configuration** dialog you will enter a unique and descriptive Configuration Name.

Check the box to enable these options:

- **Set as Default for current user.**
- **Set as Default for users without default configurations.**
- **Auto Expand All Rows.**



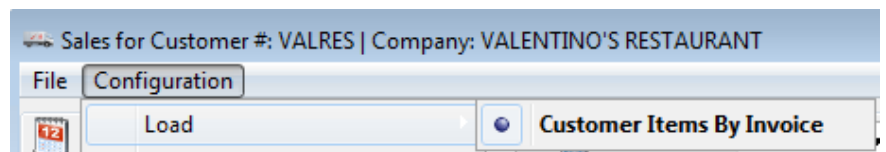
You have the option to lock the saved configuration so only you will be able to save or delete it.

- Type a password in the text box for **Enter lock password**.

Once the first configuration is saved the remainder of the **Configuration** menu options will display including:

- **Load**
- **Edit Current**
- **Set Current as Default**
- **Lock Current**
- **Delete Current**
- **Export Current Configuration**
- **Export All Configurations**
- **Import Configurations**

Here the “Customer Items By Invoice” configuration was selected from the **Load** option in the **Configuration** menu.



To see what this saved configuration does see the Customer Sales By Item configuration example in the Customer Dashboards section.

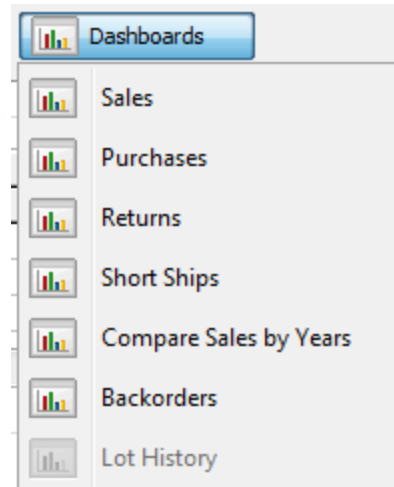
2.2 Inventory Dashboards

To access the Inventory File dashboard first locate the item the **Dashboard** button (outlined in red below) will have a drop down menu where you can select the dashboard you would like to open.

entrée version 4 has built into it a database of over 600 brands with their logos and URLs which can be used to provide further details about items in your inventory via the Brand drop down menu shown here.

The Inventory Maintenance dashboards menu has six different dashboards.

- Sales
- Purchases
- Returns
- Short Ships
- Compare Sales by Years
- Backorders
- Lot History



Example Item Short Ships

Short Ships for Item #: 10395 Description: SOUR CREAM INDIVIDUAL UOM: CASE Pack Size: 100/1 OZ Brand: BREAKSTONE										
File Configuration										
Year: All Years	Month: All Months	GP Calculation: Real Cost		Chart for selected area						
Invoice No.	Invoice Date	Salesperson	Lot Number	Real Cost \$[N]	Landed Cost \$[N]	Base Cost \$[N]	Quarter	Week Of Month	Week Of Year	No config selected
Item										
Invoice Month	Customer	10395 - SOUR CREAM INDIVIDUAL / CASE								
December		QTY Ordered[N]	WGHT Ordered[N]	QTY Ship[N]	WGHT Ship[N]	QTY Short[N]	WGHT Short[N]	Unit Price \$[N]	Short Sales Lost \$[N]	Short GP Lost \$[N]
		3.00	21.60	1.00	0.00	2.00	14.40	10.8200	21.64	20.3400
Grand Total: CASE		3.00	21.60	1.00	0.00	2.00	14.40	10.8200	21.64	20.3400

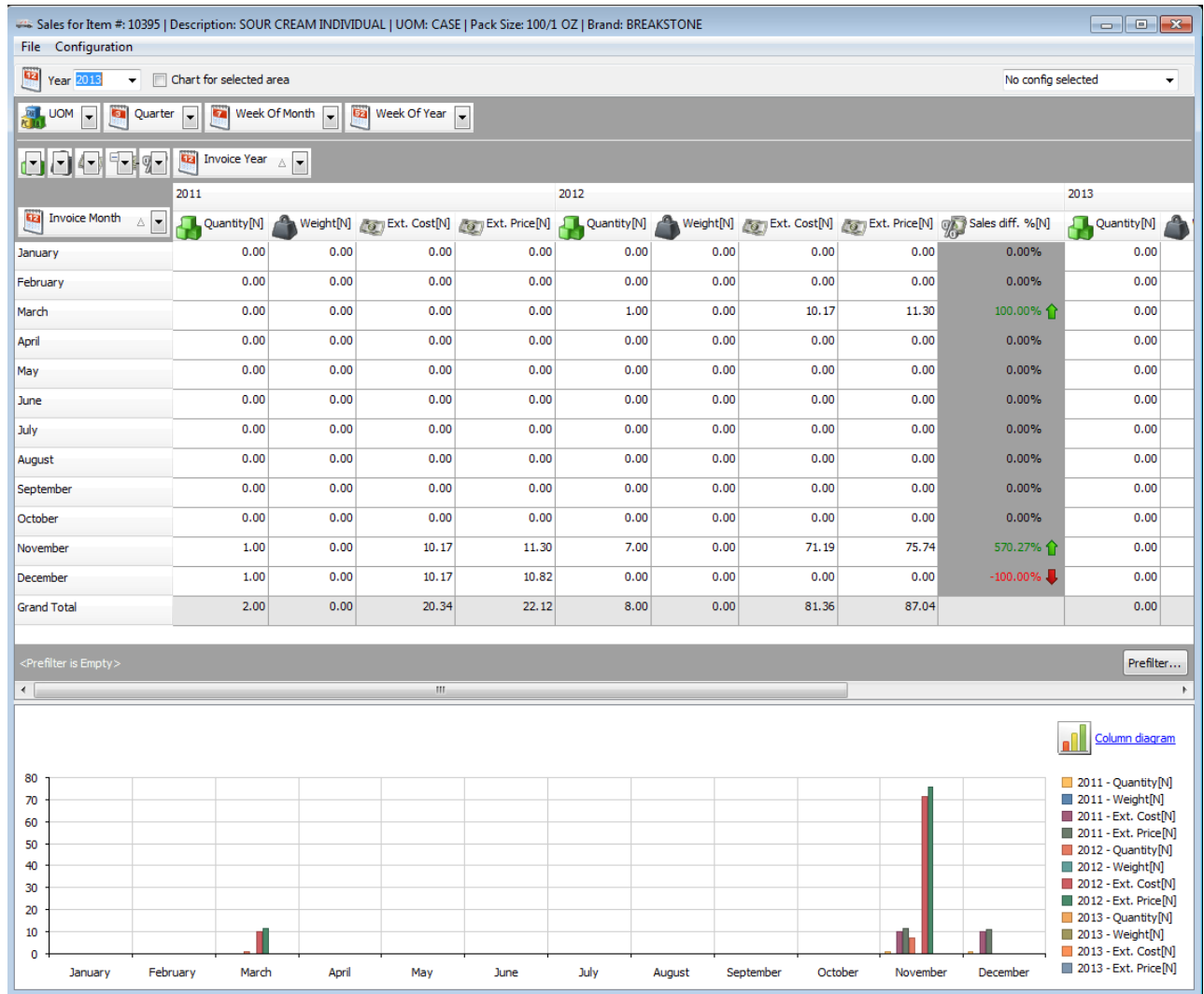
Example Inventory Returns

Returns for Item #: 10395 Description: SOUR CREAM INDIVIDUAL UOM: CASE Pack Size: 100/1 OZ Brand: BREAKSTONE										
File Configuration										
Year: 2013	Month: All Months	Chart for selected area		No config selected						
Invoice No.	Invoice Date	Salesperson	Lot Number	Real Cost \$[N]	Landed Cost \$[N]	Base Cost \$[N]	Quarter	Week Of Month	Week Of Year	
Item										
QTY R	WGHT F	Retu	Unit P	Ext. Cr	10395 - SOUR CREAM INDIVIDUAL / CASE					
Return Reason	Invoice Month	Customer	QTY Return[N]	WGHT Return[N]	Return % [N]	Unit Price \$[N]	Ext. Credit \$[N]			
Grand Total					100.00					



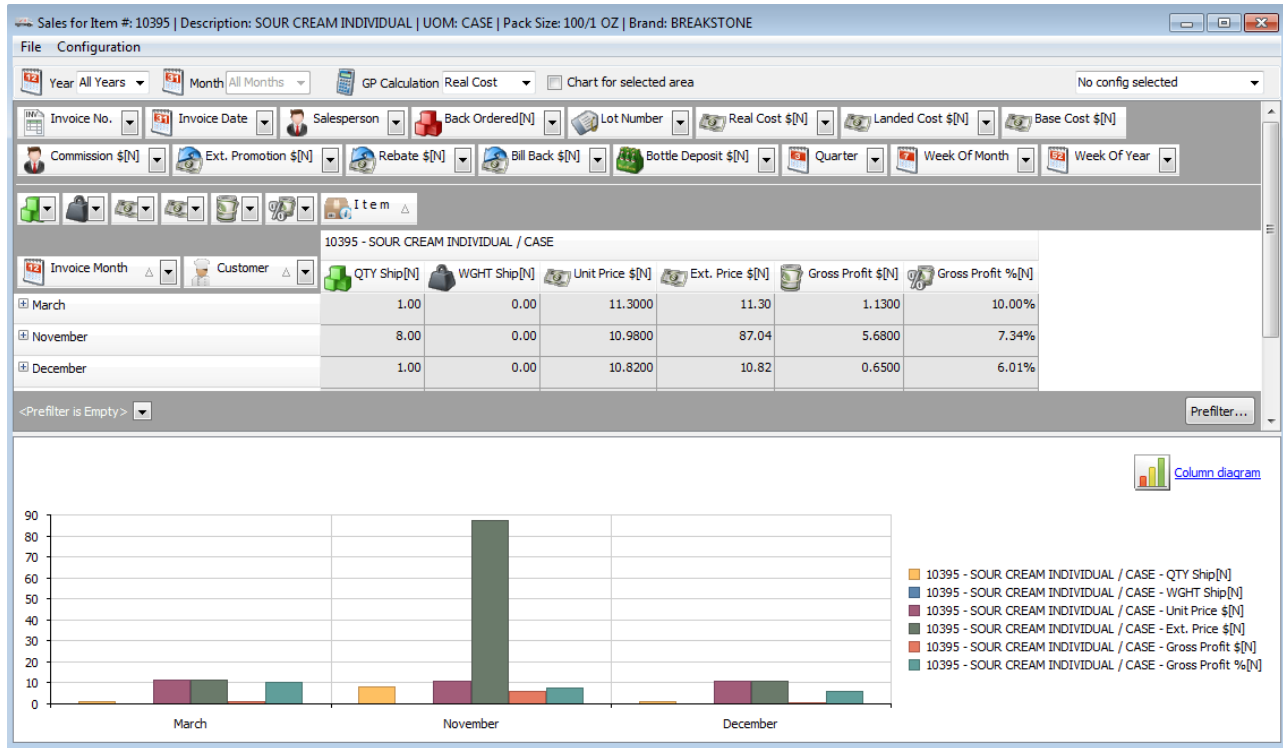
Example Inventory Compare Sales by Years

In this dashboard the **Sales diff. %** column will show you the growth percent in **green** with an up arrow or the shrinkage in **red** with a down arrow so you can quickly see the sales comparisons.





Example Inventory Sales



Example Inventory Purchases

Purchases for Item #: 10395 | Description: SOUR CREAM INDIVIDUAL | UOM: CASE | Pack Size: 100/1 OZ | Brand: BREAKSTONE

File Configuration

Year All Years Month All Months Display All Chart for selected area No config selected

Buyer PO Date Required Date Received Date Vendor Item No. Lot Number Freight Cost \$[N] Sales Tax \$[N] Quarter Week Of Month Week Of Year

Item

10395 - SOUR CREAM INDIVIDUAL / CASE

PO Month Vendor PO No.

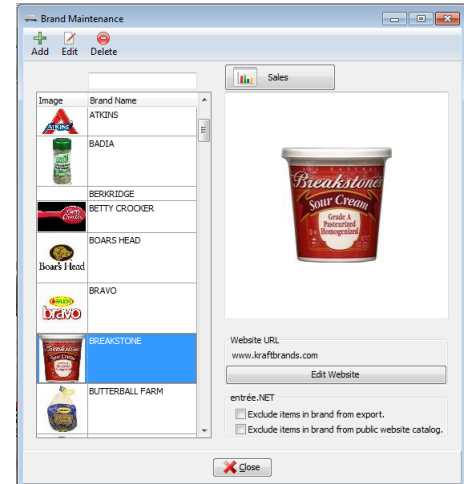
PO Month	QTY Ordered[N]	QTY Recvd[N]	QTY Open[N]	WGHT Ordered[N]	WGHT Recvd[N]	WGHT Open[N]	Unit Cost \$[N]	Ext. Cost \$[N]
November	17.00	17.00	0.00	0.00	0.00	0.00	10.17	172.89
Grand Total: CASE	17.00	17.00	0.00	0.00	0.00	0.00	10.17	172.89

2.3 Brand Dashboard

To access the **Brand Sales** dashboard first locate the item and click the **Dashboard** button. Brand only has a **Sales** dashboard. As you can see in the Brand Maintenance screen on the right the brand URL and brand logo are a part of the brand information.

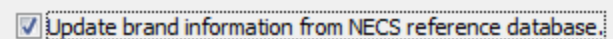
entrée version 4 has built into it a database of over 600 brands with their logos and URLs.

The brands database is accessible through the **Add** and **Edit** features in the **Brand Maintenance** dialog.



• Brands Update Utility Option

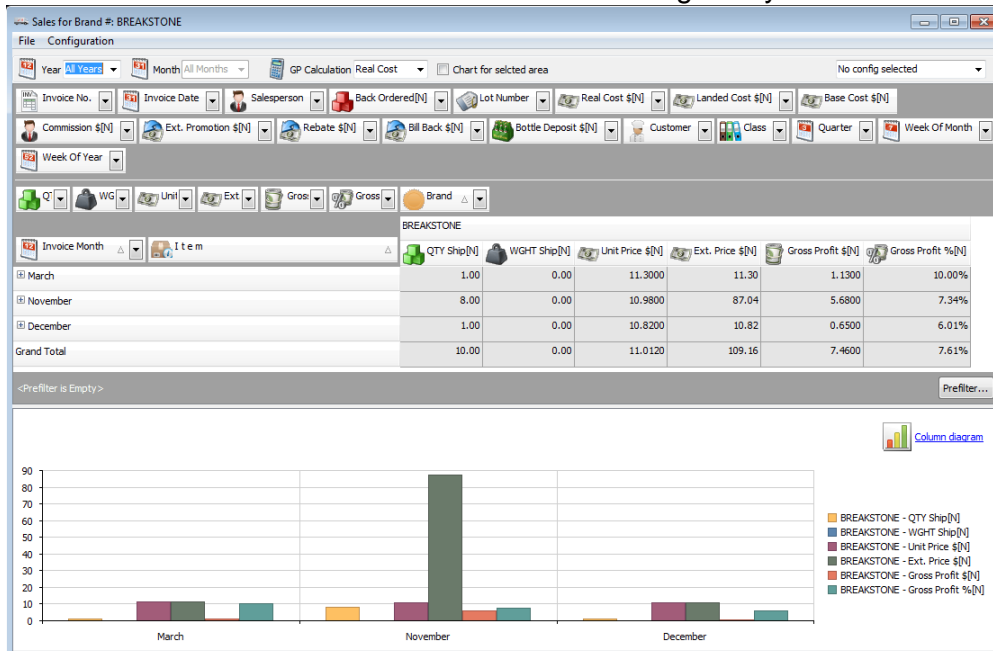
During the process to update to **version 4** you will have the option to automatically install the brand logos and URLs for the brands already in your system.



The information in the NECS reference database for brands will grow over time as NECS adds information for new brands.



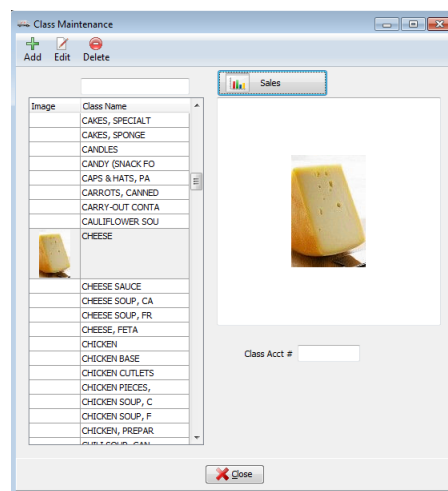
Example Brand Sales for “Breakstone” using the system default dashboard configuration.



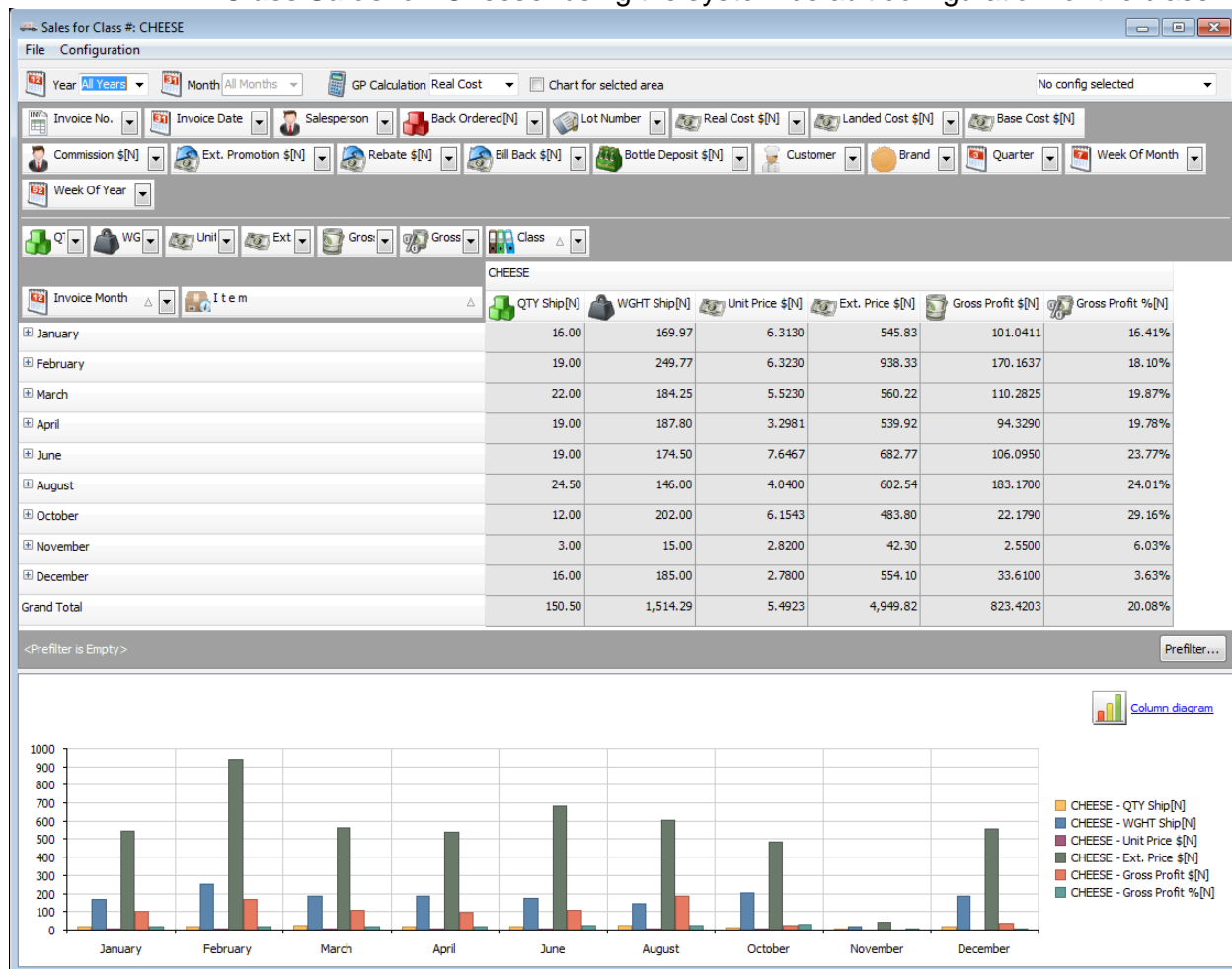
2.4 Class Dashboard

To access the **Class Sales** dashboard first locate the item and click the **Dashboard** button.

Class only has a **Sales** dashboard.



Example Class Sales for "Cheese" using the system default configuration for the class.



2.5 Customer Dashboard

To access the Customer dashboards first locate the desired customer in Customer Maintenance. Then click the **Dashboard** button to make a selection from the drop down menu.

The **Customer Maintenance** dashboards are:

- Sales
- Payments
- Compare Sales
- Returns
- Short Ships
- Backorders



Example Customer Compare Sales

In this dashboard the **Sales diff. %** column for the selected year and the two past years will show you the growth percent in **green** with an up arrow or the shrinkage in **red** with a down arrow so you can quickly see the customer sales comparisons.

Compare Sales History for Customer #: VALRES | Company: VALENTINO'S RESTAURANT

File Configuration

Year: 2012 ☐ Chart for selected area No config selected

Customer: Quarter: Week Of Month: Week Of Year:

To: Sale: Invoice Year:

Invoice Month:

	2010	2011	2012
	Total Sales \$[N]	Total Sales \$[N] Sales diff. %[N]	Total Sales \$[N] Sales diff. %[N]
January	4,017.28	0.00 -100.00% ↓	0.00 0.00%
February	3,300.20	0.00 -100.00% ↓	105.59 100.00% ↑
March	4,226.18	0.00 -100.00% ↓	18.17 100.00% ↑
April	2,128.71	0.00 -100.00% ↓	0.00 0.00%
May	0.00	0.00 0.00%	0.00 0.00%
June	0.00	1,165.83 100.00% ↑	0.00 -100.00% ↓
July	0.00	0.00 0.00%	0.00 0.00%
August	0.00	181.40 100.00% ↑	290,511.37 160,049.60% ↑
September	0.00	0.00 0.00%	0.00 0.00%
October	0.00	2,450.92 100.00% ↑	0.00 -100.00% ↓
November	0.00	36.27 100.00% ↑	0.00 -100.00% ↓
December	0.00	544.47 100.00% ↑	1,703.90 212.95% ↑
Grand Total	13,672.37	4,378.89	292,339.03

<Prefilter is Empty> Prefilter...



Example Customer Sales with Invoice Number

In the system default dashboard configuration for Customer Sales you will see the sales by Invoice Month with the monthly totals for that customer.

Below we added the **Invoice No.** field to the row area to add a second group to the analysis. The invoice data enabled the display of information in the **Items Tab** of the diagram area below when an Invoice was selected.

Sales for Customer #: ALLPLA | Company: ALL STAR PIZZA LAND

File Configuration

Year All Years Month All Months GP Calculation Real Cost Chart for selected area Customer Items By Invoice

Invoice Date Salesperson Real Cost \$[N] Base Cost \$[N] Landed Cost \$[N] Bottle Deposit \$[N] Order Date

Order Source Route Customer PO No. Sales Tax \$[N] State Tax \$[N] County Tax \$[N] City Tax \$[N]

Service Charge \$[N] Fuel Charge \$[N] Line Items[N] Ship-To Customer Quarter Week Of Month Week Of Year

Salesperson Com \$[N] Salesperson Com % [N]

Bill-To Customer

Invoice Month	Invoice No.	Invoice Total \$[N]	Total Weight[N]	Promotion \$[N]	Gross Profit \$[N]	Gross Profit % [N]
January	231311	5.00	0.00	0.00	5.0000	100.00%
	231312D	1,487.58	66.00	0.00	106.0600	7.13%
	958146A	385.90	260.00	0.00	92.1000	23.87%
January Total		1,878.48	326.00	0.00	203.1600	43.67%
October		784.60	301.02	0.00	82.3200	31.04%
November		15.77	0.00	0.00	6.6500	42.17%
December		247.88	107.20	0.00	42.8500	34.60%
Grand Total		2,926.73	734.22	0.00	334.9800	36.18%

<Prefilter is Empty> Prefilter...

Summary Chart Header **Items**

Drag a column header here to group by that column

Item	Rev.	Order Taker	Invoice Date	QTY Ord.	QTY Ship	WGHT Ord.	WGHT Ship	Unit Price \$
STRAWBERRY SHAKE SYRUP	CA	CA	1/3/2013	1	1	36	36	31.78
TORTELLINI THREE CHEESE	E	CA	1/3/2013	1	1	19	20	11.54
PROSCIUTTINI MILD	E	CA	1/3/2013	1	1	0	0	1.27
MILK WHOLE ORGANIC	D	CA	1/3/2013	1	1	10	10	10.77

• Diagram Area Controls Overview

Once the Items Tab has data to display a few tools to manage the data in the diagram area are enabled.

These tools are:

- Drag a column header here to group by that column.
- Click here to show/hide/move columns.

Some examples follow.

Summary Chart Header Items

Drag a column header here to group by that column

Item

Click here to show/hide/move columns



Example Customer Payments

- **Drag a column header here to group by that column**

Drag any field from the columns listed in the diagram area to the gray drag to bar (outlined in red in Customer Payments above) to group by that column. In the dashboard diagram area above the **Invoice Date** field was dragged to the gray bar to group the Header tab data.

Payments for Customer #: ALLPLA | Company: ALL STAR PIZZA LAND

File Configuration

Year: All Years | Month: All Months | GP Calculation: Real Cost | Chart for selected area: No config selected

Paid Date[N] | Invoice Date[N] | Check Number | Batch Number | Transaction ID[N] | Purchase Order No.

Applied by | Transaction Type[N] | Salesperson | Quarter | Week Of Month | Week of year

Invoice D | Amount | Invoice # | Customer

Paid Month | Invoice No.

	Invoice Discount \$[N]	Amount Paid \$[N]	Invoice Amount \$[N]
October	0.00	366.97	366.97
	0.00	383.82	383.82
October Total	0.00	750.79	750.79
Grand Total	0.00	750.79	750.79

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Summary Chart | Header | Items

Invoice Date[N] ▲

* Invoice No.	Paid Date[N]	Batch Number	Customer	Applied by	Salesperson	Transaction ID[N]	Purchase Order No.	Check Number	Amount
Invoice Date[N] : 10/10/2011									
229	10/13/2011	100017	ALLPLA - ALL STAR PIZZA LAND	PC	CA - Chris Anatra	100001		124578	
Invoice Date[N] : 10/11/2011									
231204	10/13/2011	100017	ALLPLA - ALL STAR PIZZA LAND	PC	CA - Chris Anatra	100001		124578	

- **Click here to show/hide/move columns**

- Click the icon to open the drop down list of columns in the diagram area (outlined in red on the right) .
- Check columns to add them to the column list
- Uncheck columns to remove the column from display
- Drag columns to new positions in the column list to move them.

Summary Chart | Header | Items

Drag a column header here to group

* Item

- ☐ Invoice No.
- ☒ Item
- ☒ Rev.
- ☒ Order Taker
- ☒ Invoice Date
- ☒ WGHT Ship
- ☒ QTY Ship
- ☐ Salesperson
- ☒ Unit Price \$
- ☒ Base Cost \$
- ☒ Real Cost \$
- ☒ Landed Cost \$
- ☒ Ext. Price \$
- ☒ Ext. Promotion \$
- ☐ Back Ordered
- ☐ Lot Number
- ☐ Commission \$
- ☐ Rebate \$
- ☐ Bill Back \$
- ☐ Bottle Deposit \$
- ☒ Gross Profit \$
- ☒ Gross Profit %

City Tax %

Version 3.000

Header Tab

When item 10532 Rack Of Pork is selected, in the **Customer Sales By Item** dashboard on the following page, you can click the **Header Tab** in the diagram area to reveal the sales header details for that item as shown below.

Summary Chart

Header

Items

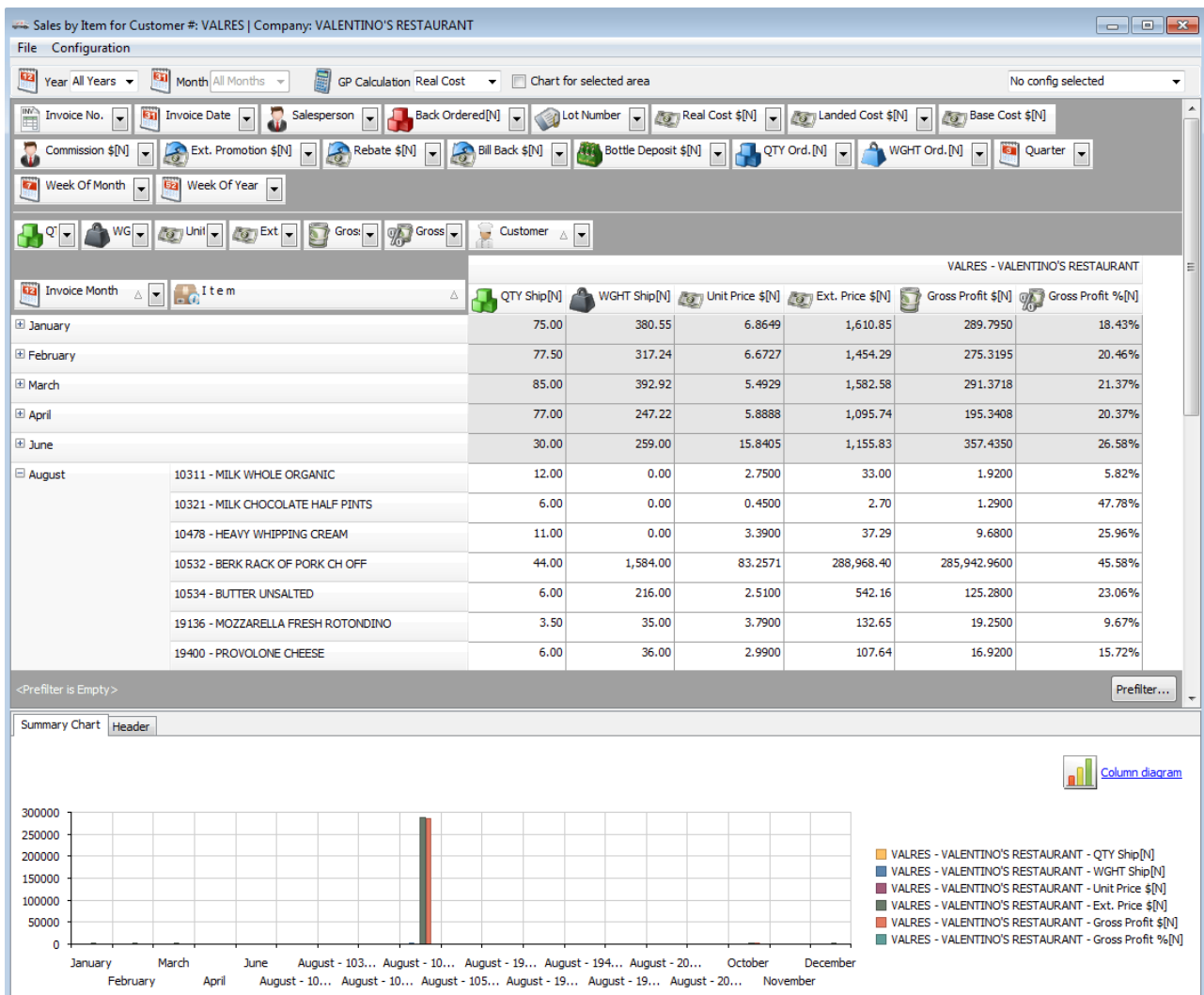
Drag a column header here to group by that column

Invoice No.	Invoice Date	Bill-To Customer	Ship-To Customer	Route	Customer PO No.	Invoice Total \$[N]	Sales Tax \$[N]	State Tax \$[N]	County Tax \$[N]	City Tax \$[N]	Service
986409C	2/15/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 13	Verbal	188.99	0	0	0	0	0
987091B	2/16/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	049 - 10	Verbal	108.48	0	0	0	0	0
988636B	2/19/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 16	Verbal	135.6	0	0	0	0	0
990212A	2/21/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M26 - 03	Verbal	144.91	0	0	0	0	0
991093D	2/22/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	FRANK	Verbal	330.01	0	0	0	0	0
991804C	2/23/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	049 - 10	Verbal	135.71	0.56	0	0.56	0	0
993276B	2/26/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 11	Verbal	214.17	0	0	0	0	0
994812C	2/28/2010	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT	M49 - 13	Verbal	439.39	0	0	0	0	0



Example Customer Sales By Item

Shown here is a configuration for Sales by Item. You are encouraged to customize the analysis to fit your business model.





Example Customer Sales By Item with a Custom Configuration

You can access the configurations saved for a dashboard in the drop down menu in the top of the screen on the far right (outlined in red). In this example the saved configuration “Customer Items By Invoice”, discussed previously in **Managing Dashboard Configurations**, was applied to the dashboard.

Sales for Customer #: ALLPLA | Company: ALL STAR PIZZA LAND

File Configuration

Year All Years Month All Months GP Calculation Real Cost Chart for selected area Customer Items By Invoice

Invoice Date Salesperson Real Cost \$[N] Base Cost \$[N] Landed Cost \$[N] Bottle Deposit \$[N] Order Date

Order Source Route Customer PO No. Sales Tax \$[N] State Tax \$[N] County Tax \$[N] City Tax \$[N]

Service Charge \$[N] Fuel Charge \$[N] Line Items[N] Ship-To Customer Quarter Week Of Month Week Of Year

Salesperson Com \$[N] Salesperson Com % [N]

Bill-To Customer

ALLPLA - ALL STAR PIZZA LAND

Invoice Month	Invoice No.	Invoice Total \$[N]	Total Weight[N]	Promotion \$[N]	Gross Profit \$[N]	Gross Profit % [N]
January	231311	5.00	0.00	0.00	5.0000	100.00%
	231312D	1,487.58	66.00	0.00	106.0600	7.13%
	958146A	385.90	260.00	0.00	92.1000	23.87%
January Total		1,878.48	326.00	0.00	203.1600	43.67%
October		784.60	301.02	0.00	82.3200	31.04%
November		15.77	0.00	0.00	6.6500	42.17%
December		247.88	107.20	0.00	42.8500	34.60%
Grand Total		2,926.73	734.22	0.00	334.9800	36.18%

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Summary Chart Header Items

Drag a column header here to group by that column

Item	Rev.	Order Taker	Invoice Date	QTY Ord.	QTY Ship	WGHT Ord.	WGHT Ship	Unit Price \$
STRAWBERRY SHAKE SYRUP	CA	CA	1/3/2013	1	1	36	36	31.78
TORTELLINI THREE CHEESE	E	CA	1/3/2013	1	1	19	20	11.54
PROSCIUTTINI MILD	E	CA	1/3/2013	1	1	0	0	1.27
MILK WHOLE ORGANIC	D	CA	1/3/2013	1	1	10	10	10.77

Items Tab

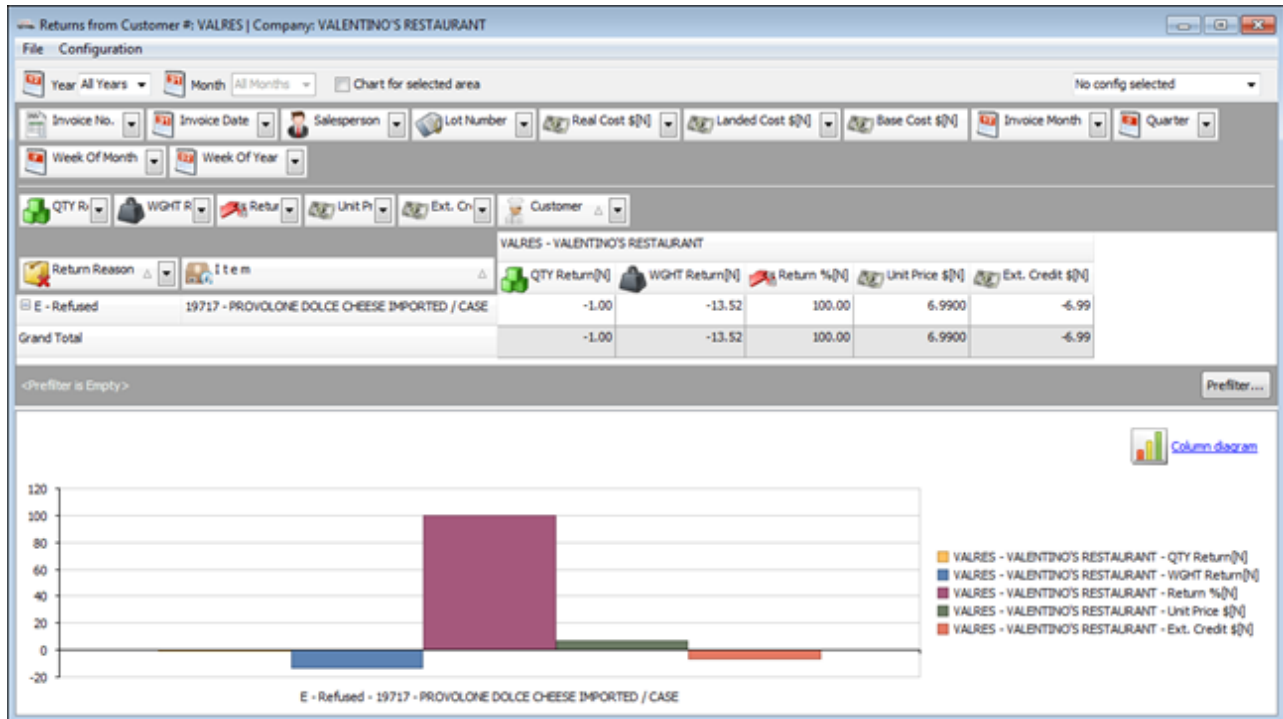
If there is a set default configuration it will automatically be loaded and applied to the dashboard data when it opens. Once the **Invoice No.** field was added to the row area on the left individual invoices were listed and the **Items Tab** now had data to display.

Invoice 231312D was selected and then the **Items Tab** in the lower section of the screen was clicked in the diagram area. Now the tab shows the items on that invoice with the item details as shown in our example.



Example Customer Returns

Here you will see the record of returns from each of your customers. You can use this dashboard to quickly identify any patterns or recurring problems with a customer. Columns are grouped using the **Return Reason** codes built into the **entrée** system.



Example Customer Short Ships

Here you see the **Short Sales Lost** and the **Short GP Lost** columns will quickly tell you where the potential sales from the customer were lost. This dashboard will help you find patterns where possibly the same item caused lost sales with many customers. Click the **+ plus sign** and expand the list to see what items were involved in the lost sales.

Invoice Month	QTY Ship	WQHT Ship	QTY Short	WQHT Short	Unit Price	Short Sales Lost	Short GP Lost
January	0.00	0.00	1.00	10.00	3.7900	3.79	3.2400
March	1.00	10.00	1.00	10.00	1.7900	1.79	1.4000
August	1.50	15.00	5.50	133.00	2.9860	16.83	13.8300
October	23.00	180.00	34.00	429.50	10.6293	304.93	241.6600
December	0.00	49.68	0.00	50.32	4.2200	212.35	195.7448
Grand Total	25.50	254.68	41.50	632.82	7.8882	539.69	455.8748

2.6 Vendor Dashboard

The Vendor Maintenance dashboards menu includes:

- **Purchases**
- **Payments**

The system default dashboard configurations for Vendor Purchases and Vendor payments are shown below.



Example Vendor Purchases Dashboard

With this dashboard it is fast and easy to keep track of your purchases from the many vendors you deal with on a daily basis.

The screenshot shows the 'Purchases from Vendor #: ASAGIO | Company: ASSAGIO AUTHENTIC ITALIAN SPECIALTY' dashboard. It features a 'File Configuration' menu and various filters for data analysis. The filters include Year (All Years), Month (All Months), Chart for selected area, PO Number, Received Date, PO Status, Vendor Item Number, Freight Cost \$[N], Discount %[N], Discount \$[N], Extended Cost \$[N], Lot Number, Brand[N], Quarter, Week Of Month, and Week Of Year. Below these, there are icons for Vendor, QTY Ordered[N], QTY Received[N], WGHT Ordered[N], WGHT Received[N], and Purchase Cost \$[N]. A 'Grand Total' section is visible at the bottom left.



Example Vendor Payments Dashboard

It is important to manage and monitor your cash flow. The Vendor Payments dashboard allows you to verify payments to avoid double payments and other mistakes.

The screenshot shows the 'Payments from Vendor #: FARMIN | Company: FARMINGTON FOODS' dashboard. It features a 'File Configuration' menu and various filters for data analysis. The filters include Year (All Years), Month (All Months), Chart for selected area, Last Pay Date, Last Check Number, Invoice Number, Due Date, Buyer, Reference, Pay Discount Days[N], Pay Discount Date, Invoice Month, Quarter, Week Of Month, and Week Of Year. Below these, there are icons for Vendor, PO Number, Invoice Date, Pay Discount \$[N], Pay Discount %[N], Pay Adjustment \$[N], Payment Amount \$[N], and Invoice Total \$[N]. A 'Grand Total' section is visible at the bottom left.

2.7 Salesperson Dashboard

To access the Salesperson dashboard first find the desired salesperson in Salesperson / Broker Maintenance. Then click the **Dashboard** button to make a selection from the drop down menu.

The Salesperson / Broker Maintenance dashboards are:

- **Sales**
- **Sales by Item**
- **Compare Sales by Years**



Example Salesperson Sales Dashboard

Sales for Salesperson #: CA - Chris Anatra

File Configuration

Year: All Years Month: All Months GP Calculation: Real Cost Chart for select: No config selected

Invoice No. Invoice Date Real Cost \$[N] Base Cost \$[N] Landed Cost \$[N]

Bottle Deposit \$[N] Order Date Order Source Route Customer PO No. Sales Tax \$[N]

State Tax \$[N] County Tax \$[N] City Tax \$[N] Service Charge \$[N] Fuel Charge \$[N]

Line Items[N] Ship-To Customer Bill-To Customer Commission \$[N] Commission % [N]

Quarter Week Of Month Week Of Year

Salesperson CA - Chris Anatra

Invoice Month	Invoice Total \$[N]	Total Weight[N]	Promotion \$[N]	Gross Profit \$[N]	Gross Profit % [N]
January	13,398.71	3,725.38	0.00	2,568.8300	22.64%
February	11,021.58	3,550.85	0.00	2,258.1900	21.77%
March	9,165.34	2,866.93	0.00	1,950.0900	25.17%
April	5,903.54	1,748.11	0.00	1,168.1400	21.13%
June	1,165.83	266.20	0.00	367.4300	28.49%
August	290,849.87	2,120.25	0.00	286,436.5300	50.55%
September	20.00	0.00	0.00	10.8800	54.40%
October	9,553.27	1,662.65	0.00	2,391.0900	33.17%
November	3,532.61	930.85	0.00	367.3400	23.27%
December	7,923.37	1,958.46	0.00	957.5600	22.55%
Grand Total	352,534.12	18,829.68	0.00	298,476.0800	26.80%

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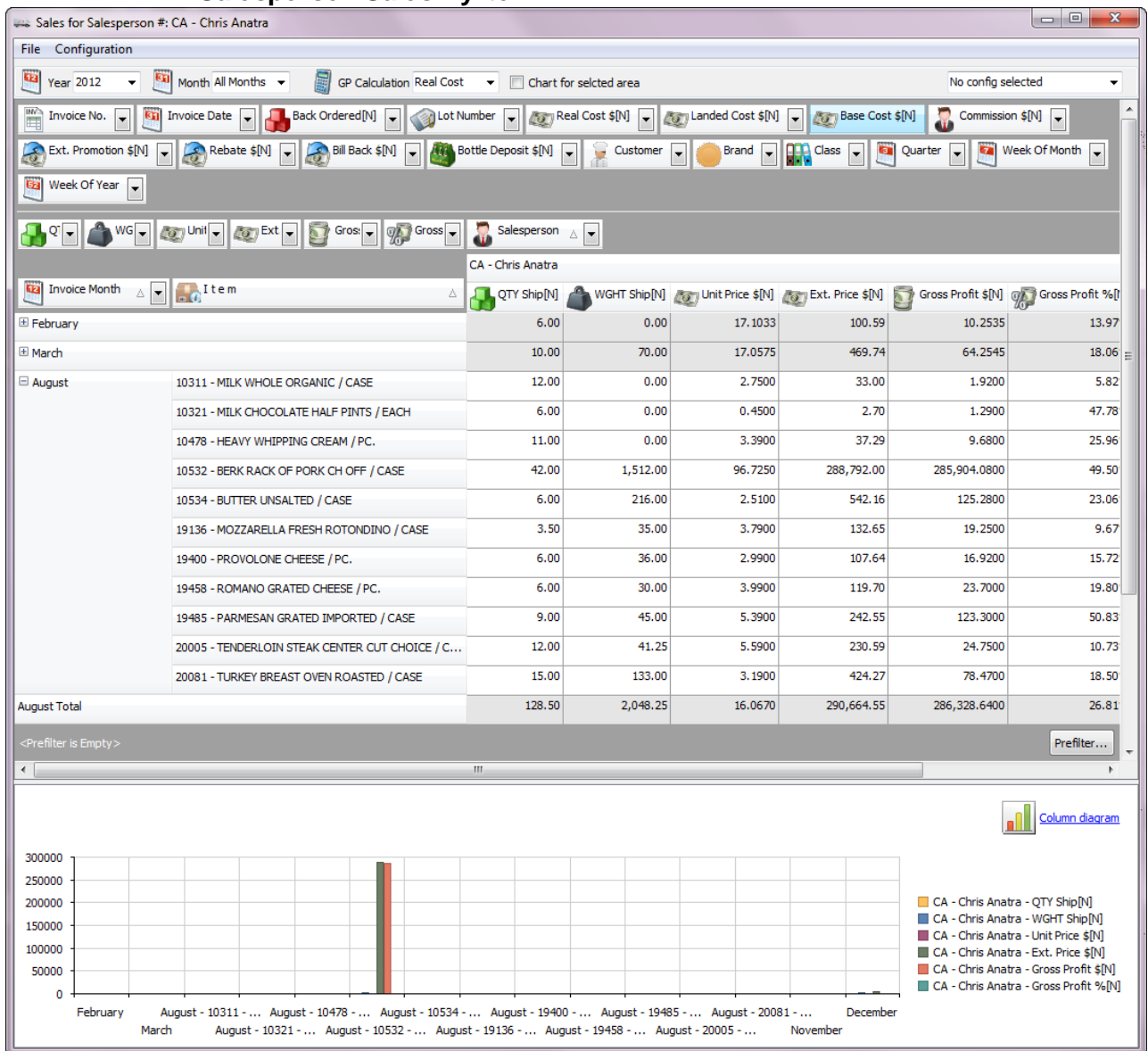
Summary Chart Header Items

Drag a column header here to group by that column

Invoice No.	Invoice Mon	Invoice Date	Bill-To Customer	Ship-To Customer
150A	6	6/19/2011	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT
182B	6	6/16/2011	VALRES - VALENTINO'S RESTAURANT	VALRES - VALENTINO'S RESTAURANT

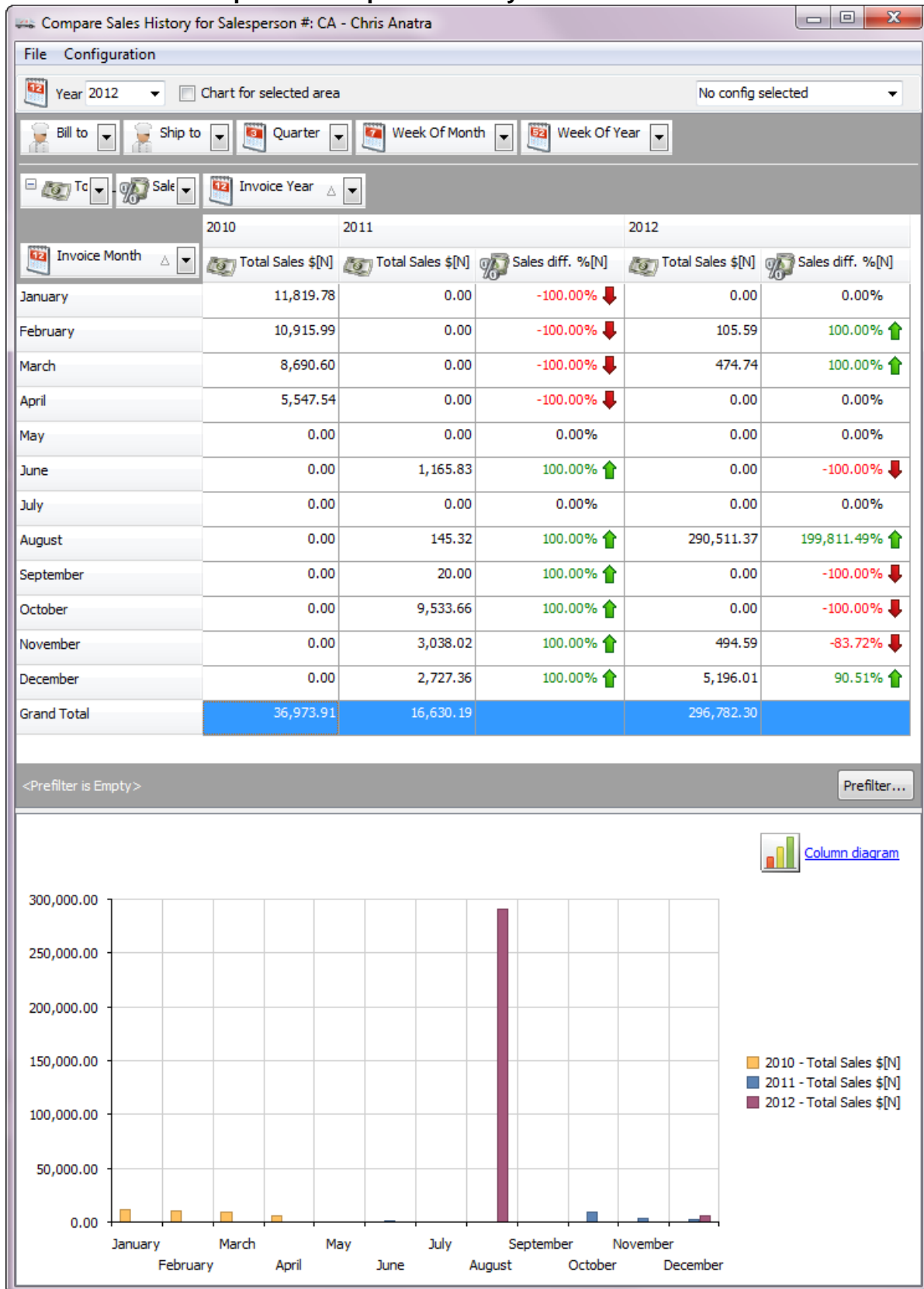


Example Salesperson Sales By Item





Example Salesperson Compare Sales By Years

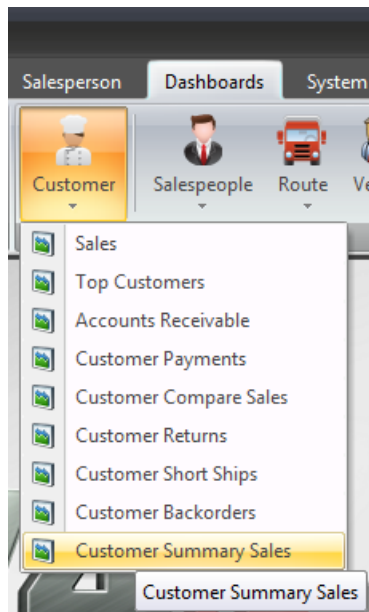


2.8 Summary Dashboards

In V4.0.38 the new **Summary Dashboard** feature was implemented for Inventory, Customer and Vendor File Maintenance. This dashboard allows you to examine up to 25 years of history data from the ARSUMRY table.

- The Summary Dashboards can be accessed via the main **Dashboards** ribbon menu using the Inventory, Customer and Vendor sub-menus.

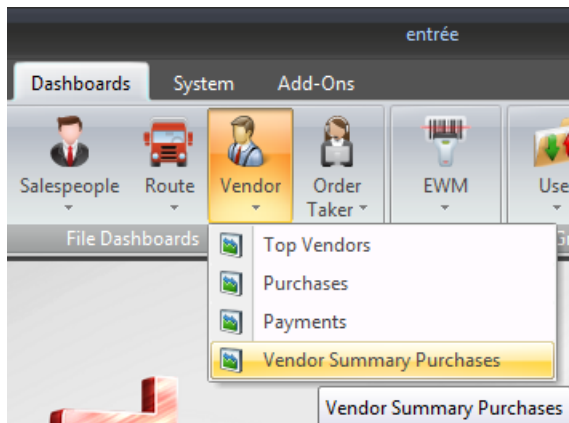
Dashboard Ribbon Customer Menu



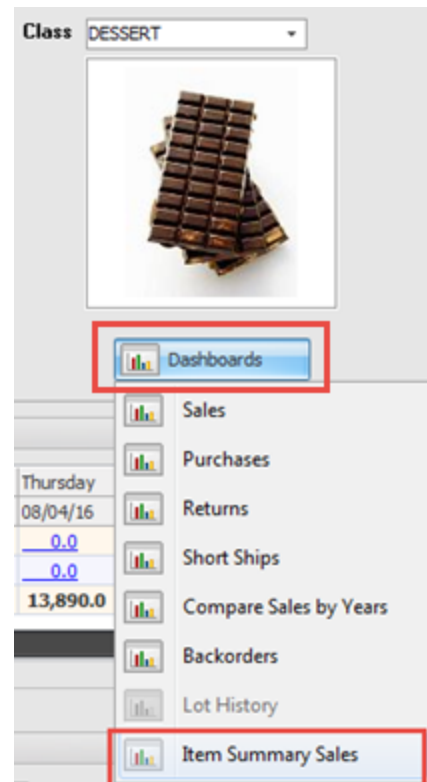
Dashboard Ribbon Inventory Menu



Dashboard Ribbon Vendor Menu

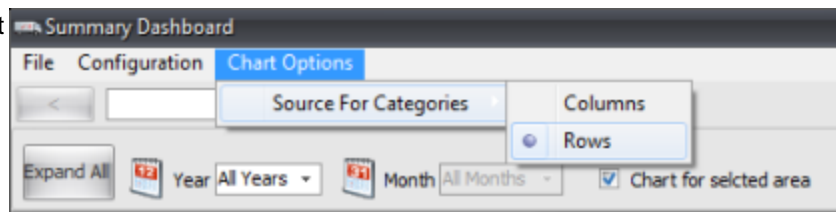


- The Summary Dashboards can also be accessed using the **Dashboards** menu in the Inventory File, Customer File and Vendor File Maintenance screens.



- The new **Source for Categories** feature has been added to dashboards in the **Chart Options** menu.

This menu feature allows you to direct the dashboard processes to only use the data in the rows or columns you have highlighted to generate the summary chart.



Hot Tip!

Be aware that some chart styles, like Stacked Area, may not provide you with a chart that has a meaningful comparison of the data. Some experimentation may be required to work with this new feature and various chart styles.

The **Rows** and **Columns** options in the menu allow you to switch the graph data source category for the horizontal **x-axis** in the chart. The vertical **y-axis** will reflect the range of data values for the selected data comparison.



Example Summary Dashboards Source for Categories Options

- First the 2011 and 2012 columns were highlighted and the **Columns** option selected in the menu.

Summary Dashboard

File Configuration Chart Options

Source For Categories Columns Rows

Expand All Year All Years Month All Months Chart for selected area

Cost

Sales End Year

End Month Customer Number

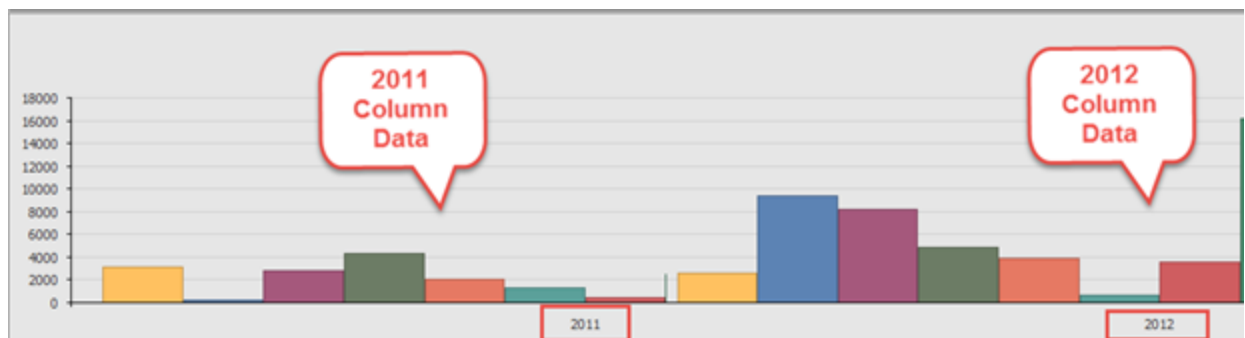
	2006	2007	2008	2009	2010	2011	2012
January	22,667.24	7,550.69	80,190.55	897.81	7,618.11	3,111.50	2,559.02
February	14,814.26	767.01	2,948.15	412.14	31,206.78	222.94	9,351.98
March	9,267.70	7,022.48	1,251.32	9,237.38	922.11	2,853.81	8,200.04
April	8,491.02	2,115.13	8,019.19	8,689.97	13,565.05	4,304.70	4,824.70
May	1,420.47	2,200.77	2,981.12	2,136.11	33,836.11	2,023.74	3,927.99
June	886.55	1,878.67	10,805.43	2,884.59	11,678.15	1,337.69	605.20
July	687.55	1,676.15	1,266.88	6,924.88	1,907.55	479.56	3,568.41
August	13,002.17	1,566.15	10,141.28	5,468.73	16,651.32	2,527.76	16,136.99
September	1,519.61	4,114.69	3,379.52	4,322.30	-9,349.64	2,271.53	5,160.49
October	3,036.66	3,870.26	2,629.08	5,769.13	20,375.32	2,078.34	4,505.36
November	5,325.40	7,282.09	19,013.70	2,629.27	9,264.26	7,218.21	1,221.18
December	395.02	1,984.80	3,242.23	3,807.29	2,858.18	4,164.18	2,972.22

Selected Column Data

- The first chart was generated for Columns and used the selected column's headers as the x-axis categories.

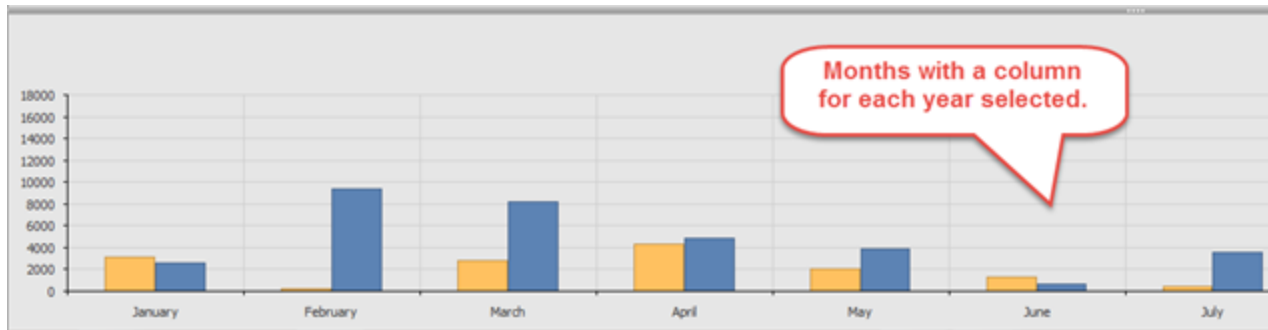
The result was a comparison of the Summary data for the years 2011 and 2012 with a column for each month.

(Note: The two charts below were edited to remove some columns to fit on the page.)



- Using the same data when the **Rows** option is selected the months are the x-axis categories.

The years 2011 and 2012 are the yellow and blue columns in the chart for each month.



Example Summary Dashboard with Invalid Analysis

This is an example of a Summary Dashboard for Customer Summary Sales that provided no real analysis of the sales data because of the choices made for the Source for Categories (columns) and the Type of Chart generated (Stacked Area).

As you can see below the data for the two years selected, 2011 and 2012, is not compared properly so there is no analysis just a meaningless stack of data.

So be aware that your Summary Dashboard choices can impact whether you get a valid analysis generated.

