SA/BGM Management Dashboard

Quick Guide

September 2016

Explanation of SA/BGM Management Dashboard charts and tables

MANAGEMENT FINANCIAL METRICS

PROFIT/LOSS COMPARATIVE *and* SALES COMPARATIVE

Compare by	Criteria
Month	Order status: **"Invoiced"** Orders created in front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Specified month in the chart. In-hands date between: -- to -- List two sets of data for comparision. Previous 1-12 months of profit/sales vs. profit/sales for previous 13-24 months
Quarter	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Specified quarter on chart start to quarter end. Quarters are Jan-Mar (Q1), Apr-Jun (Q2), Jul-Sep (Q3), Oct-Dec (Q4). In-hands date between: -- to -- List two sets of data for comparision. Profit/sales for the last 1-4 quarters vs. last 5-8 quarters
Year	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Specified year on chart start to year end. In-hands date between: -- to -- List maximum of up to last 12 years profit/sales.

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MANAGEMENT TOP/BOTTOM METRICS

Below is the search criteria used for the top/bottom 10 account executives. Similar criteria apply for the top 10 suppliers, top 10 products and top 10 accounts dashboard sections.

TOP/BOTTOM 10 ACCOUNT EXECUTIVES SINCE A YEAR AGO TODAY	
Select by	**Criteria**
MTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Current month start and current date In-hands date between: -- to -- List top/bottom 10 AE's based on sum of Total revenue/gross profit/commission/Cost of associated orders on current month start to current date.
QTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: current quarter start to current date. Quarters are Jan-Mar (Q1), Apr-Jun (Q2), Jul-Sep (Q3), Oct-Dec (Q4). In-hands date between: -- to -- List top/bottom 10 AE's based on sum of Total revenue/gross profit/commission/Cost of associated orders on current quarter start to current date.
YTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: current year start to current date. In-hands date between: -- to -- List top/bottom 10 AE's based on sum of Total revenue/gross profit/commission/Cost of associated orders on current year start to current date
LYTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: one year back from now to current date. In-hands date between: -- to -- List top/bottom 10 AE's based on sum of Total revenue/gross profit/commission/Cost of associated orders one year back from now to current date.

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ORDER STATUS AGING ANALYSIS

Based on orders created in last year only and data based on status history.

Status	Calculation
New order	Order status: **"New"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Chart specified month start and month end In-hands date between: -- to -- Average number of days orders stay in new status in particular month
Pending approval	Order status: **"Pending Approval"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Chart specified month start and month end In-hands date between: -- to -- Average number of days orders stay in Pending Approval status in particular month
In-Process	Order status: **"In-Process"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: current year start to current date. In-hands date between: -- to -- Average number of days orders stay in In-Process status in particular month
Shipped	Order status: **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: one year back from now to current date. In-hands date between: -- to -- Average number of days orders stay in Shipped status in particular month
Ready to invoice	Order status: **"Ready-to-invoice"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: one year back from now to current date. In-hands date between: -- to -- Average number of days orders stay in Ready-to-invoice status in particular month

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