FlightDeck Dashboard (V1.2)

- FlightDeck Tiles
- Sales By Filter
- Salesrep Goal
- Sales By Day
- Top Customers
- Sales Summary By Filter
- Inventory Dashboard
- Goals

FlightDeck Tiles

The FlightDeck Dashboard breaks down your sales into 6 metrics, which are filterable based on total sales, online sales, or in-store sales.

Note that the Net Sales value may be effected by online orders that were returned in store - currently there is no way for a return to be processed as having originally been purchased online.

Tile Types

Gross Sales

The gross sales tile is the total value of all products that were sold.

Net Sales

The net sales tile is the total value of all products that were sold, minus the value of any items that were returned.

Total Invoices

The total invoices is calculated based on all sales tied to your Salesrep ID for the given month, where the total value of the invoice is greater than 0. For invoices with more than one line item each invoice number is only counted once.

Average Invoice Lines

The average number of lines per invoice is calculated based on the total number of lines processed for the given month, divided by the total number of invoices over the same period.

Average Invoice Value

The average invoice value is the sum of all invoices values for the given month, divided by the numbe rof invoices over the same period.

Avg GP%

The Average GP% is calculated based on all sales tied to your Salesrep ID for the given month, where the total value of the invoice is greater than 0. This value is calculated by taking the value from the Total Sales tile, subtracting the cost of all the sold items, and then dividing by the Total Sales tile value.

Sales By Filter

The Past Month Sales By Filter graphs give you a quick visual representation of the breakdown of your sales so far this month, compared to this day of last month.

By Category

Filtering by category gives you a breakdown of your sales per category associated with a product.

Limited to top 25 Categories.

By Discount Group

Filtering by Discount Group, as defined within COUNTERPOINT.

By Class

Filtering by class gives you a breakdown of your sales per class associated with a product. Any sales involving products that do not have a class associated with them will not be represented by this graph.

Limited to top 25 Classes.

By Branch

Filtering by branch gives you a breakdown of your sales per branch associated with the sale.

By Industry

Filtering by industry gives you a breakdown of your sales per unique industry value you have assigned to customers via Counterpoint. If you have active customers that do not have an Industry value associated with them, those sales will not be represented by this graph.1

Note that for all graphs some of the labels may not appear for given columns, depending on the size of your screen. To view the name for a column that did not appear, mouseover or tap either

value from the column.

Salesrep Goal

The Salesrep Goal offers a quick glance at your progress towards your primary goal.

For a more detailed description, check out the chapter on Goals.

The FlightDeck Dashboard offers a quick visual representation of your progress towards a monthly goal, or an annual goal with two monthly views.

For a monthly goal, the only gauge you will see represents your total progress towards that goal. As you near the right side of the gauge and the gauge turns a stronger colour of green, you are nearing 100% completion of your set target.

For an annual goal, the large gauge represents your total progress towards that goal. In addition, two smaller gauges represent your progress towards that goal for this month (using comparative data from the previous year) as well as how you did in the last completed month.

Although you may have many goals set up on your account, we only have room to display one on the FlightDeck Dashboard. Therefore, we use the oldest goal that hasn't completed yet, as that is likely to be your next completed goal. For a view of all your goals, click the "View/Edit Goals" link in the top right section of the panel.

Sales By Day

MTD Sales By Day shows all of your sales to date this month, on a daily basis. Each node on the graph represents a day this month, allowing you to easily spot patterns and irregularities in your sales.

Top Customers

The Top Customers Chart shows your top 5 customers over the current period, based on total sales value.

In the event that one of these customers has a negative sales value, the graph will grow to the left, below the 0 value.

To display the exact value of the sales for a given customer, mouseover the coloured bar that represents the customer.

In the event that you are viewing a period for a specific customer, this graph will instead display as "Top Clerks" and display the top 5 clerks for sales made by the customer, over the current period.

Sales Summary By Filter

This information has moved: https://docs.amscomputergroup.com/books/counterpoint-cloud-platform/page/prebuilt-reports#bkmrk-sales-table

Inventory Dashboard

The inventory dashboard gives you an overview of the value and breakdown of your inventory, on a per-branch or aggregate basis.

> **Warning:** Unlike sales information, the majority of the inventory information is not fully managed by COUNTERPOINT, and therefore the values displayed can only be as good as the data provided.

Window Switcher

The window switcher for the inventory dashboard allows you to select one or more of your branches to load the inventory data from.

Inventory Summary

The inventory summary consists of 4 tiles offering at-a-glance stats about the inventory data you have loaded. This includes:

- Inventory Cost

  Sum of Average Cost * Quantity, per part

- Forecasted Annual Turns

  Sales over past 12 months vs current value of inventory

- Currently Stocked Items

  Unique count of items with stock > 1

- Items With Invalid Stock

  Unique count of items with stock < 1

Inventory Breakdown Graphics

Inventory for the current window is broken down into "top 10" graphics, categorized by:

- Category

- Branch
- Part Number
- ACA Category

Inventory Low Stock

The Inventory Low Stock table lists all of the parts within the current window that have what we consider to be "low stock". By default, the low stock threshold is (On Hand + On Order) < (Sold Last 12 Months / 24). Or in other words, you have lower stock between On Hand and On Order than you are expected to sell over half a month.

Inventory Old Stock

The Inventory Old Stock Table lists all of the parts within the current window that have not been sold in the past 24 months, as well as the quantity and overall inventory value of the parts.

Goals

Goals offer a way to visually see progress towards a long term target, focused on either a month-end or year-end value.

Goals Summary

The goals summary page shows all of your current, non-completed goals and their progress split up based on whether they are specific to you or company wide.

Clicking on the name of a specific goal takes you to that goal's breakdown, showing your current progress and target as well as a monthly breakdown for annual goals.

Pressing the View/Edit Goals button in the top right takes you to the goal listing, where you can mark goals as primary, create new goals, and view completed goals.