FlightDeck

Documentation for the FlightDeck Module

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FlightDeck Dashboard

Sales Filters

| Branches: 3 | Current Window: **2022-06-01 - 2022-06-15** | Previous Window: **2022-05-01 - 2022-05-15** | Customer: **All** | ▽ **Current Data Filters** |

Along the top of the FlightDeck Dashboard is the display of your current data filters. This defines the branches, current configured sales period, previous comparative sales period and any specific customers. All information on the FlightDeck Dashboard is based off of these filters.

To modify the filters, you would click the **Current Data Filters** link, and the filter selections will slide down

Sales Summary Tiles

All Sales	Online Sales	Store Sales	Cash Sales	Charge Sales		❓
$ Net Sales	GP$	GP%	📄 Total Invoices	📄 Avg. Invoice Lines	$ Avg. Invoice Value	
$1,461,572	$477,979	32.70%	18,150	1.9	$81	
58% Over previous	56% Over previous	-1% Over previous	18% Over previous	0% Over previous	34% Over previous	

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

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.

GP $

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

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.

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 number of invoices over the same period.

> **Warning:** If you start switching between the three different filters without giving the numbers the chance to recalculate successfully, it is possible to end up with a mix of values from the different filters.

Quick Account Stats

These are 3 tabs outlining some basic account based metrics

- Active Customers - Number of customers with sales within the set timeframe
- New Customers - Number of customers added to the system within the set timeframe
- Average Days of Receivables - Current average number of days receivables (does not adhere to the filters)
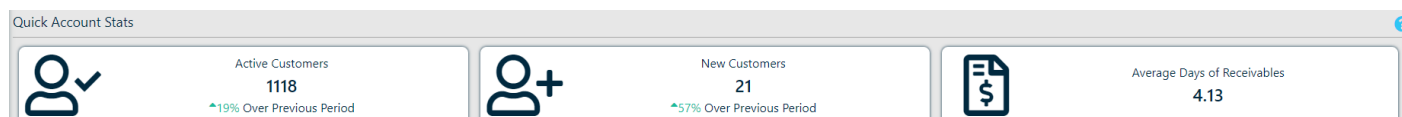
Sales Breakdown Graph

The Past Month Sales By Filter graphs give you a quick visual representation of the breakdown of your sales of the current period compared to last period, based upon the current data filters
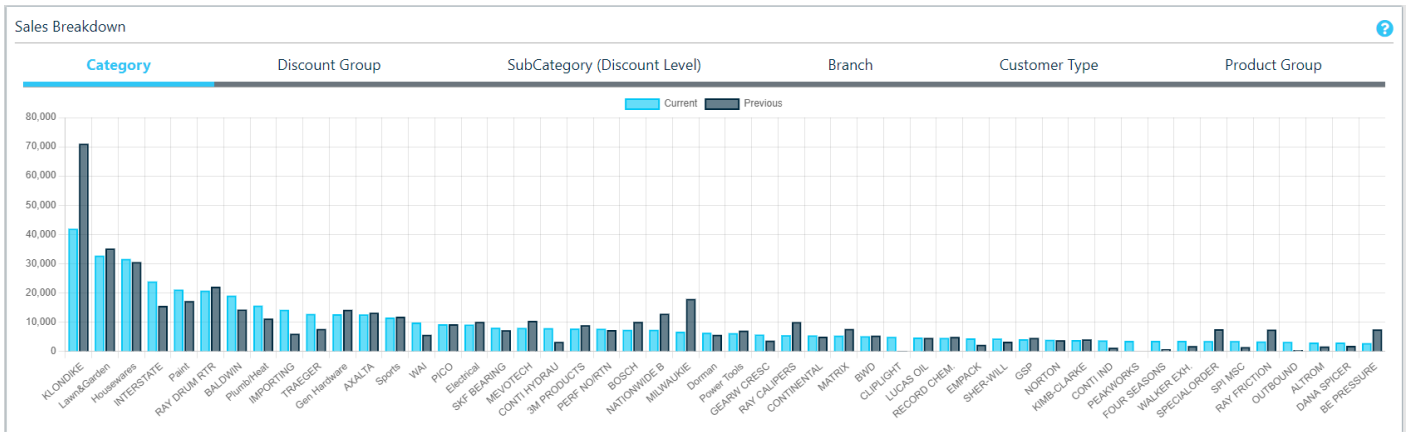
By Category

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.

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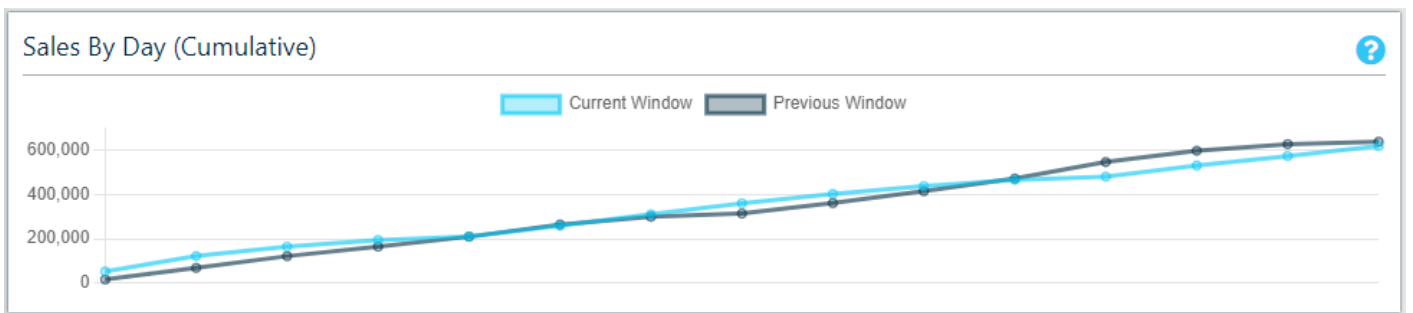
Sales By Day
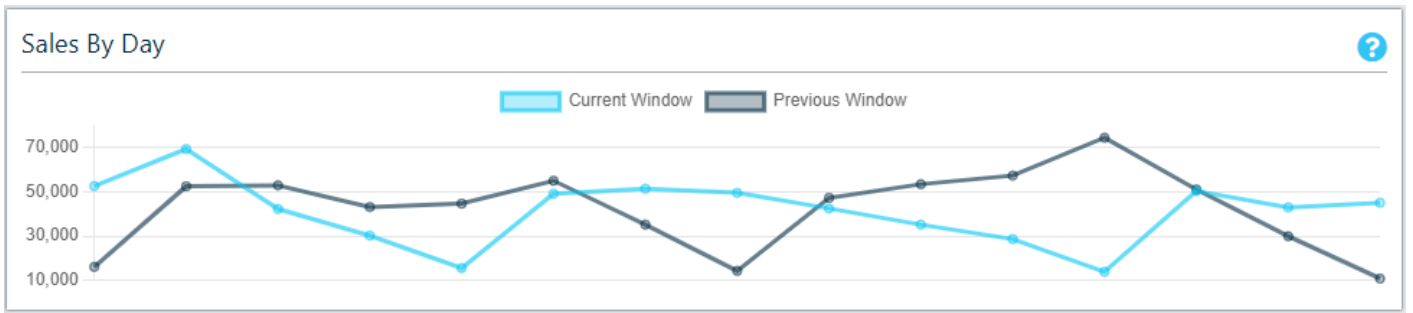
MTD Sales By Day shows all of your sales to date this month, on a daily basis. Each node on the graph represents a day this month, allowing you to easily spot patterns and irregularities in your sales.
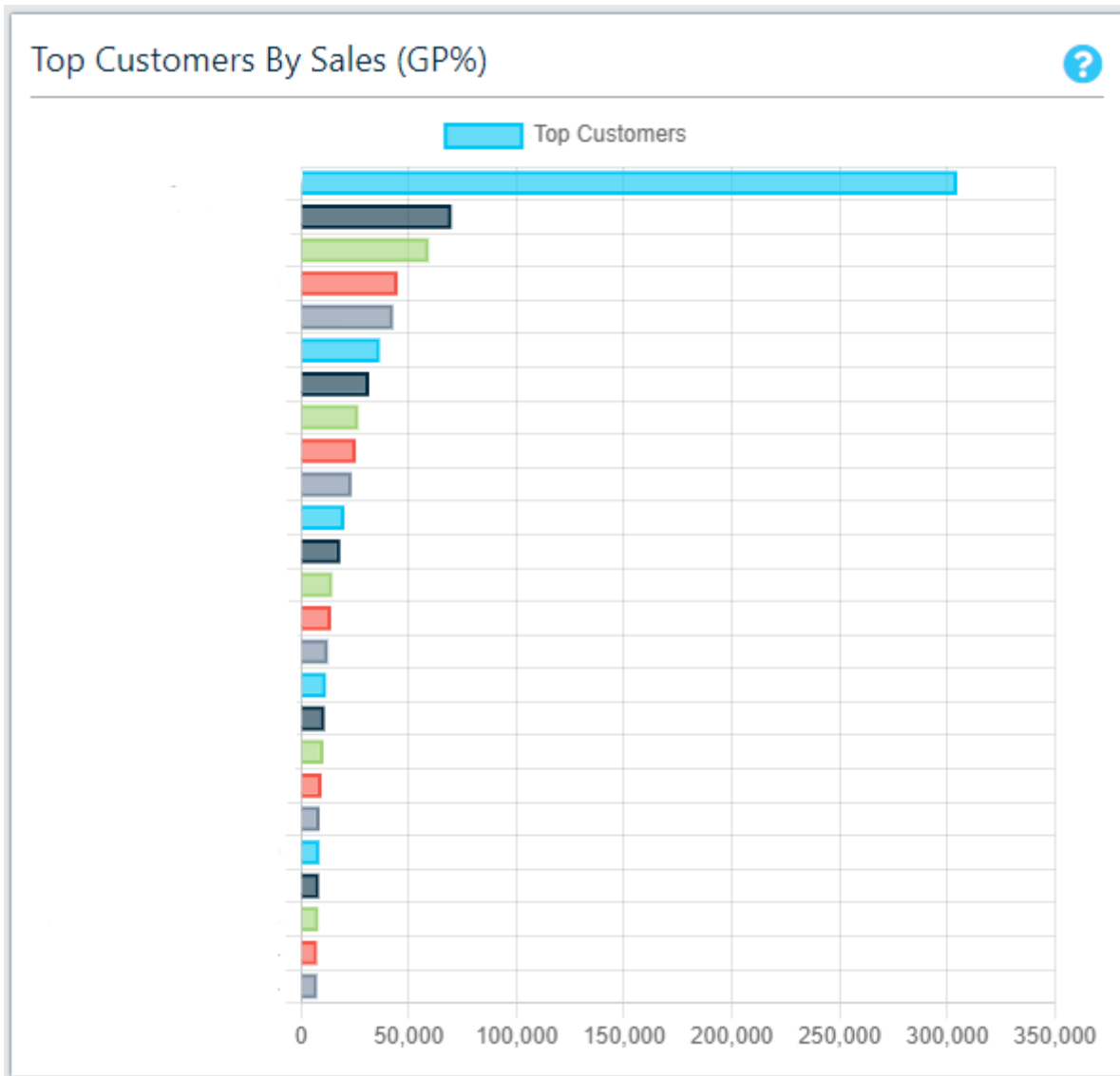
Sales By Day is available as both a comparative and a cumulative chart.

Cumulative Sales

The cumulative sales graph shows the running total of sales over the specified period. This allows for a visual representation of any outliers that don't fit in with the sales trends over a longer period of time.

Top Customers
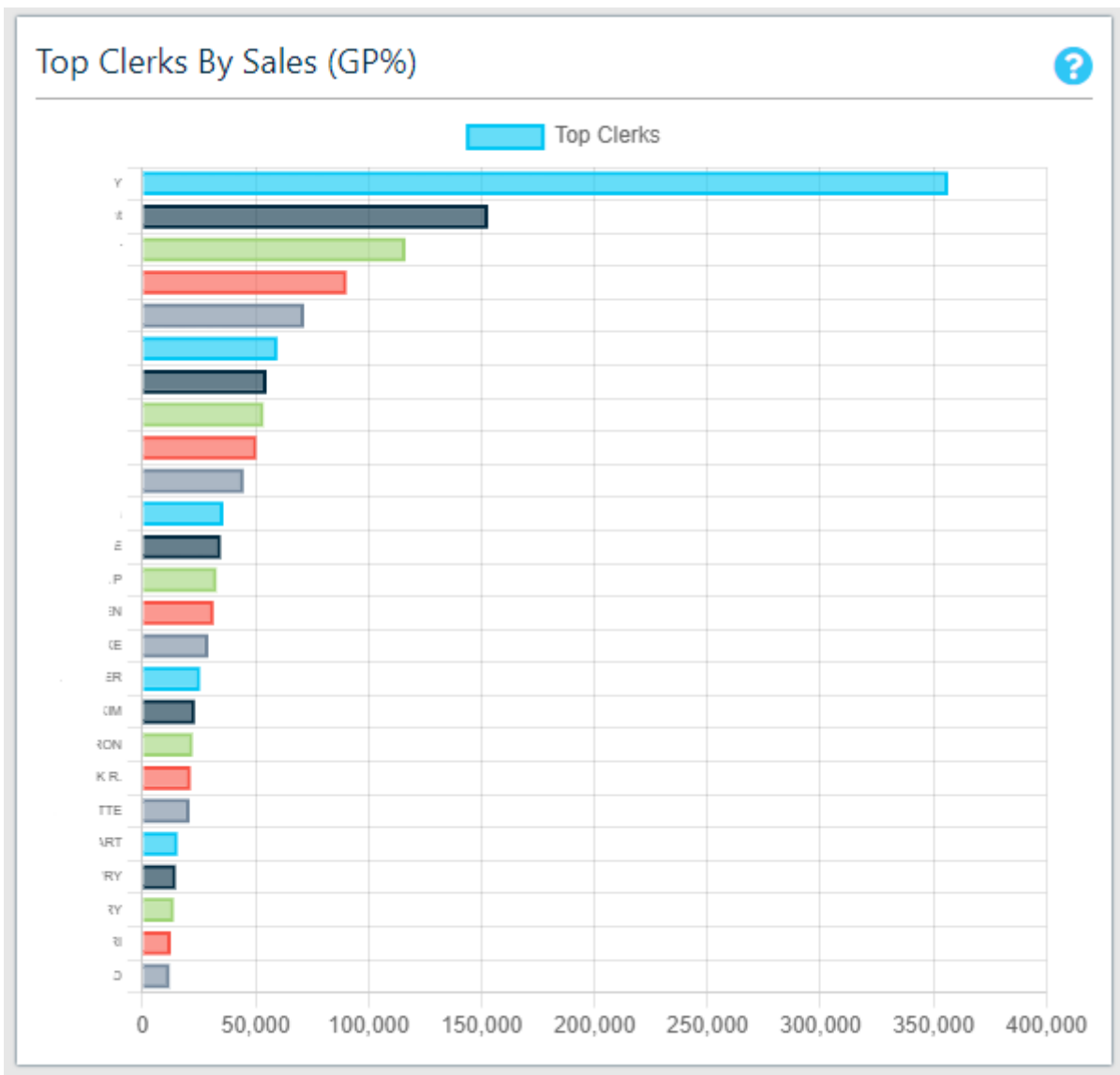
Top Customers By Sales (GP%)

The Top Customers Chart shows your top 25 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 25 clerks for sales made by the customer, over the current period.
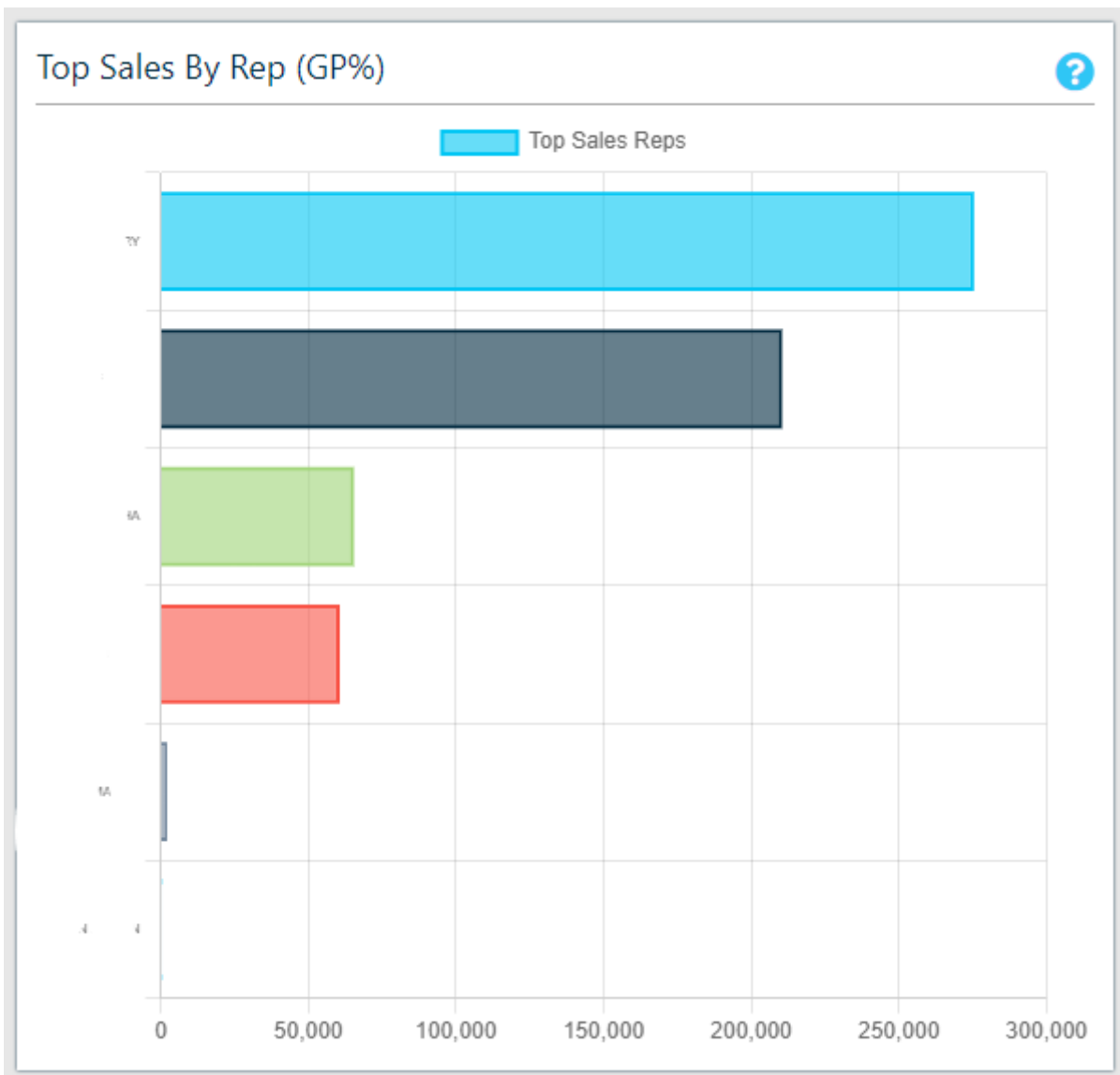
Top Clerks By Sales

The Top Clerks Chart shows your top 25 clerks over the current period, based on total sales value.

In the event that one of these clerks has a negative sales value, the graph will grow to the left, below the 0 value.
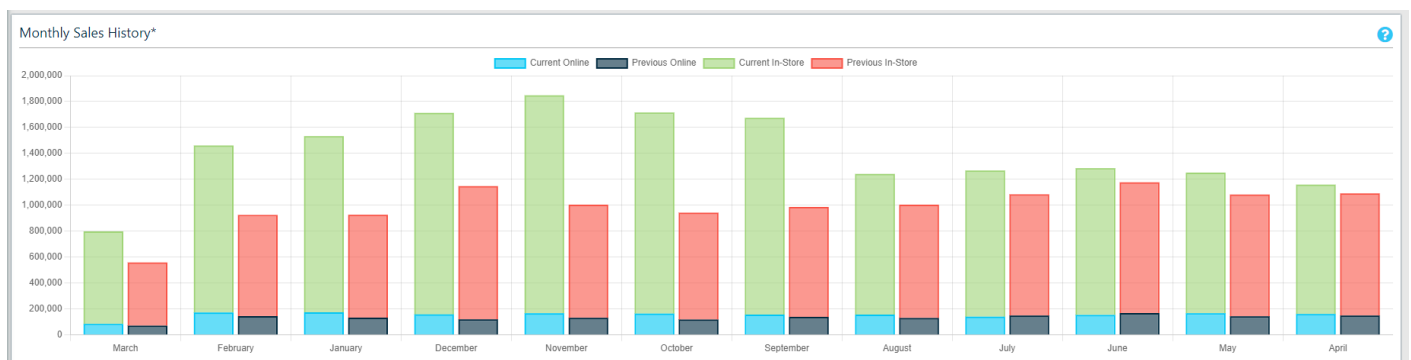
To display the exact value of the sales for a given clerk, mouseover the coloured bar that represents the clerk.

Top Sales By Rep

Top sales by rep shows your sales by sales rep. Hovering over the bars will display the detailed total sales figure

Monthly Sales History

This graph shows the past 12 months sales, by month, compared to the previous year in a stacked graph showing online and in-store sales.

Inventory Dashboard

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

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** - Your system's internal linecodes
- **Branch -** Your configured branch locations

- **ACA Category -** Product classifications based on product vehicle fitment and the autocare association ACES standard.
- Old stock by category

Aged Inventory Summary

The inventory summary consists of 4 tiles offering at-a-glance stats about your inventory and it's aged valuation

- Current Stock

  Items that have been sold or added in the past 12 months

- 12 Month Stock

  Items that have not been sold in the past 12 months, but have been sold in the past 24 months
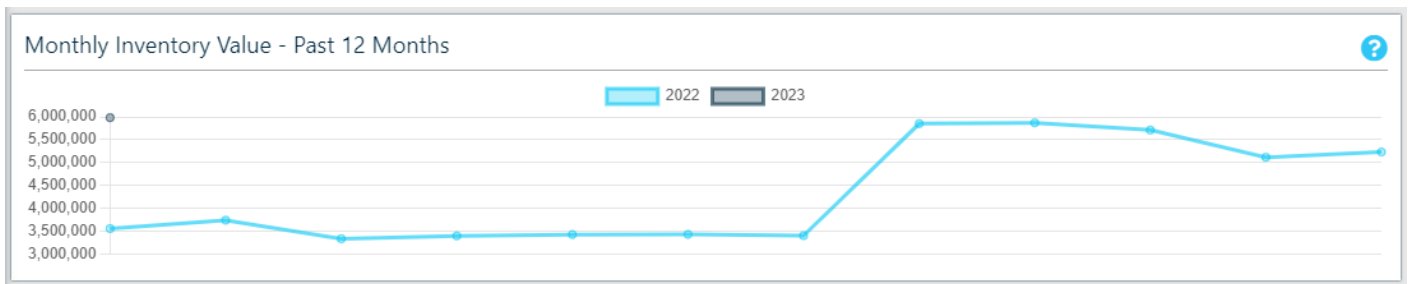
- 24 Month Stock

  Items that have not been sold in the past 24 months, but have been sold in the past 36 months

- 36 Month Stock

  Items that have not been sold in the past 36 months

Monthly Inventory Value

Displays the monthly inventory value (at average cost) by month for the past 12 months

Inventory Status

4 additional inventory status metrics

- Inventory Turns Ratio - calculated by dividing the cost of goods by average inventory for the same period.
- Stock To Sales Ratio - Average stock value / Net sales value
- Weeks Inventory Onhand - Accounting Weeks in Period / Inventory Turnover Rate
- Days Inventory Outstanding - (Average inventory / Cost of sales) x Number of days in period (365)

Historic Inventory Status
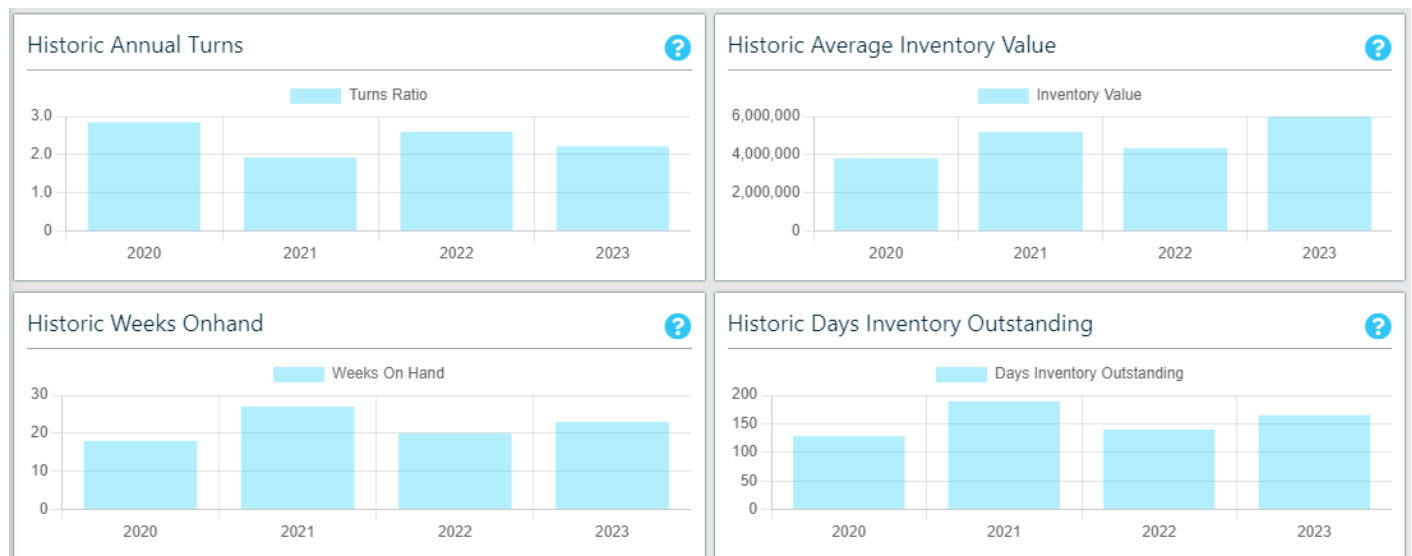
A set of 4 graphs displaying the historic values for the 4 inventory status metrics:

- Inventory Turns Ratio - calculated by dividing the cost of goods by average inventory for the same period.
- Stock To Sales Ratio - Average stock value / Net sales value
- Weeks Inventory Onhand - Accounting Weeks in Period / Inventory Turnover Rate
- Days Inventory Outstanding - (Average inventory / Cost of sales) x Number of days in period (365)

By year, for the past 3 years

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.

Goal Diagram

Goal Title

The title of the goal set when it was created.

Current Progress (Value)

Your current progress towards the goal over the duration of the goal so far.

Current Progress (%)

Your current progress towards the goal over the duration of the goal so far, as a % value of the goal total.

Goal Total

The total value the goal is set for.

Goal Pace

The calculated value of how far along in your goal you should be at its current state, if you are to achieve the goal by its completion date.

This is calculated by: ((Days elapsed towards goal / Total days in goal) * Goal Total)

In the picture above, the goal has completed - therefore the goal pace is ((365 / 365) * 14707648).