

Table of Contents

Overview	3
Counter User Login Screen	4
Sales Dashboard.....	6
Month To Date Goals.....	7
Year To Date Goals.....	7
Sales Dollars	7
Gross Margin %	7
Profit Dollars.....	8
Number Of Invoices.....	9
Avg Line Items.....	9
New Return %.....	10
Award Table.....	10
Alerts & Notifications.....	11
Schedule	12
Selecting A User To View	13
Day Schedule View.....	13
Appointment Background Colors	14
Week Schedule View	15
Month Schedule View.....	16
Timeline Schedule View	17
Viewing Appointment Details	18
Entering A Customer Note From An Appointment	19
Customer List.....	22
Viewing Customers.....	22
Search By Ranking.....	23
Search By Name/Number	24
Search by Store ID	24
Search by Salesperson Code	24
Saving Search Criteria	24
Clearing Search Criteria.....	24
Exporting Customer List Results	25
Customer Navigation.....	26
About Customers.....	28
ePartConnection	31
eOffice.....	31
Business Intelligence.....	32
Upper Heading Sales Information Cells Section.....	33
Monthly Sales Bar Graph Table Section.....	34
Month/Year To Date Sales Bar Graphs Section.....	34
Line Code Sales Information Section.....	34
Sales Groups.....	36
Notes	37
Tasks	38
Directions	39

Search Notes	40
Emailing Search Notes Results	43
Drilling Down Into Notes	46
Links.....	49

Overview

The Autologue eSales Business Intelligence (BI) Customer Relationship Management (CRM) website is designed to display a variety of information based upon whether you are logged in as an owner/administration, sales manager, salesman, store manager or counterperson. Sales dashboards for customers by salesperson as well as by counterperson get shown from their login home pages. Alerts and notification parameters are setup by management to alert personnel when customers have stopped purchasing completely, increased/decreased in sales, or are returning merchandise more frequently. CRM about the customer information is readily available for viewing which builds and strengthens your customer relationship/loyalty by capturing their business and personal information.

Counter User Login Screen

When a counter user has logged in, the following screen will be displayed:



This is the counter user's home screen in "Limited" mode (enabled in ePartSetup -> Manage Users/Roles). Here the counter user only can see the following:

- View a sales dashboard of his performance against monthly & yearly sales goals, and their "Award" table. "Awards" (Award \$\$) are calculated on the difference between "Actual Sales" and "Goal" dollar amounts, then multiplied by the award percentage (when dollar amount is positive).

When not in "Limited" mode, the counter user has access to a grid view of their goals, as well as several tiles like a Sales user:

Sales Dollars												
Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	% of Store
\$0.00	\$0.00	\$0.00	0.00%	\$0.00	0.00%	0.00%	\$1868.00	\$4313.00	-56.69%	\$0.00	0.00%	59.59%


Gross Margin %												
Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	% of Store
0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	60.01%	55.12%	8.87%	0.00%	0.00%	59.04%


Profit Dollars												
Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	% of Store
\$0.00	\$0.00	\$0.00	0.00%	\$0.00	0.00%	0.00%	\$1120.95	\$2377.39	-52.85%	\$0.00	0.00%	59.04%


Number of Invoices												
Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	% of Store
0	0	0	0.00%	0.00	0.00%	0.00%	41	51	-19.61%	0.00	0.00%	66.13%


Avg Line Items												
Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	% of Store
0.00	0.00	0.00	0.00%	0.00	0.00%	0.00%	1.41	1.73	-18.50%	0.00	0.00%	102.92%


New Return %												
Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	% of Store
0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	9.74%	-100.00%	0.00%	0.00%	0.00%

 Alerts & Notifications

 Schedule

 Customer List

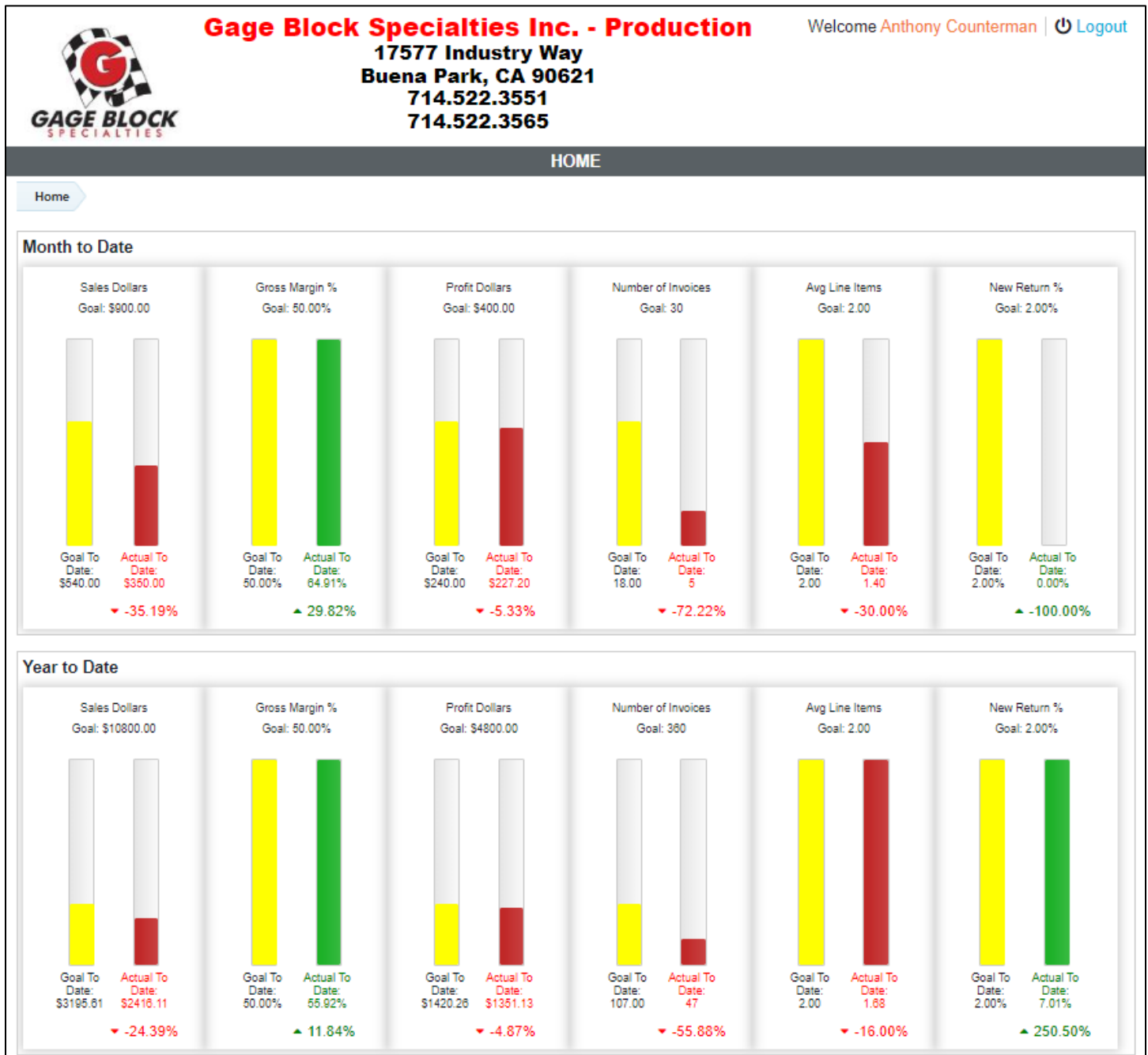
 Search Notes

 Links

Sales Dashboard

Outlined below are the different sections of the counter user's sales dashboard screen and an explanation of each. This screen contains a graphical "sales dashboard" of the counter user's sales from the past year on up through the current date. It displays a variety of graphed sales figures as well as dollar values for returns. It also shows the percentage changes (positive/negative) based up the current sales figures versus the projected sales goals. If setup, it will also show an award table that contains the actual sales amount, goal amount, the difference (goal – actual), award percentage and the award dollar amount earned when the sales goal has been met.

Note: The award table only displays when setup.



Month To Date Goals

This section displays line graphs that reflect the current month to date values (*Actual To Date:*) (right hand bar) versus the projected goal values (*Goal To Date:*) (left hand bar) for the following:

- Sales Dollars
- Profit Dollars
- Avg Line Items
- Gross Margin %
- Number of Invoices
- New Return %

Clicking within the screen section allows you to scroll up/down to view all the sales graph information.

Year To Date Goals

This section displays line graphs that reflect the current year to date values (denoted by the light grey diamond ♦) versus the projected goal values (denoted by the light blue pointer ►) for the following:

- Sales Dollars
- Profit Dollars
- Avg Line Items
- Gross Margin %
- Number of Invoices
- New Return %

Sales Dollars

The Sales Dollars section contains the following information when NOT in Limited Mode:

Heading	Description
Prev Day	Shows Sales Dollars from the previous day
MTD	Shows the Month To Date (MTD) sales dollar amount. Denoted by the right-hand bar within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) sales dollar amount.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) sales dollar amounts.
MTD Goal	Shows the Month To Date (MTD) sales dollars goal. Denoted by the left-hand bar within the Goals MTD screen section.
% MTD Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal sales dollar amounts.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store sales dollar amounts.
YTD	Shows the Year To Date (YTD) sales dollar amount. Denoted by the right-hand bar within the Goals YTD screen section.
LYTD	Shows Last Years (LY) Year To Date (YTD) sales dollar amount.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) sales dollar amounts.
YTD Goal	Shows the Year To Date (YTD) sales dollars goal. Denoted by the left-hand bar within the Goals YTD screen section.
% YTD Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal sales dollar amounts.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store sales dollar amounts.

Gross Margin %

Heading	Description
Prev Day	Shows Profit Dollars from the previous day
MTD	Shows the Month To Date (MTD) Profit dollar amount. Denoted by the right-hand bar within the Goals MTD screen section.

LY MTD	Shows Last Years (LY) Month To Date (MTD) profit dollar amount.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) profit dollar amounts.
MTD Goal	Shows the Month To Date (MTD) Profit dollars goal. Denoted by the left-hand bar within the Goals MTD screen section.
% MTD Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal profit dollar amounts.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store profit dollar amounts.
YTD	Shows the Year To Date (YTD) profit dollar amount. Denoted by the right-hand bar within the Goals YTD screen section.
LYTD	Shows Last Years (LY) Year To Date (YTD) profit dollar amount.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) profit dollar amounts.
YTD Goal	Shows the Year To Date (YTD) profit dollars goal. Denoted by the left-hand bar within the Goals YTD screen section.
% YTD Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal profit dollar amounts.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store profit dollar amounts.

Profit Dollars

The Profit Dollars section contains the following information:

Heading	Description
Prev Day	Shows Profit Dollars from the previous day
MTD	Shows the Month To Date (MTD) Profit dollar amount. Denoted by the right-hand bar within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) profit dollar amount.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) profit dollar amounts.
MTD Goal	Shows the Month To Date (MTD) Profit dollars goal. Denoted by the left-hand bar within the Goals MTD screen section.
% MTD Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal profit dollar amounts.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store profit dollar amounts.
YTD	Shows the Year To Date (YTD) profit dollar amount. Denoted by the right-hand bar within the Goals YTD screen section.
LYTD	Shows Last Years (LY) Year To Date (YTD) profit dollar amount.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) profit dollar amounts.
YTD Goal	Shows the Year To Date (YTD) profit dollars goal. Denoted by the left-hand bar within the Goals YTD screen section.
% YTD Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal profit dollar amounts.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store profit dollar amounts.

Number Of Invoices

Heading	Description
Prev Day	Shows Invoices from the previous day
MTD	Shows the Month To Date (MTD) number of invoices. Denoted by the right-hand bar within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) number of invoices.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) number of invoices.
MTD Goal	Shows the Month To Date (MTD) number of invoices goal. Denoted by the left-hand bar within the Goals MTD screen section.
% MTD Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal number of invoices.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store number of invoices.
YTD	Shows the Year To Date (YTD) number of invoices. Denoted by the right-hand bar within the Goals YTD screen section.
LYTD	Shows Last Years (LY) Year To Date (YTD) number of invoices.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) number of invoices.
YTD Goal	Shows the Year To Date (YTD) number of invoices. Denoted by the left-hand bar within the Goals YTD screen section.
% YTD Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal number of invoices.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store number of invoices.

Avg Line Items

Heading	Description
Prev Day	Shows Avg Line Items from the previous day
MTD	Shows the Month To Date (MTD) average line items. Denoted by the right-hand bar within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) average line items.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) average line items.
MTD Goal	Shows the Month To Date (MTD) average line items goal. Denoted by the left-hand bar within the Goals MTD screen section.
% of Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal average line items.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store average line items.
YTD	Shows the Year To Date (YTD) average line items. Denoted by the right-hand bar within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) average line items.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) average line items.
YTD Goal	Shows the Year To Date (YTD) average line items. Denoted by the left-hand bar within the Goals YTD screen section.
% YTD Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal average line items.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store average line items.

New Return %

Heading	Description
Prev Day	Shows the Previous Day's percentage of returns against Sales
MTD	Shows the Month To Date (MTD) percent returns. Denoted by the right-hand bar within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) percent returns.
% Change	Shows the percentage difference when comparing Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) percent returns.
MTD Goal	Shows the Month To Date (MTD) percent returns. Denoted by the left-hand bar within the Goals MTD screen section.
% MTD Goal	Shows the percentage when comparing Month To Date (MTD) versus MTD Goal percent returns.
% of Store	Shows the percentage when comparing Month To Date (MTD) versus MTD store percent returns.
YTD	Shows the Year To Date (YTD) percent returns. Denoted by the right-hand bar within the Goals YTD screen section.
LY YTD	Shows Last Years (LY) Year To Date (YTD) percent returns.
% Change	Shows the percentage difference when comparing Year To Date (YTD) versus Last Year (LY) Year To Date (YTD) percent returns.
YTD Goal	Shows the Year To Date (YTD) percent returns. Denoted by the left-hand bar within the Goals YTD screen section.
% YTD Goal	Shows the percentage when comparing Year To Date (YTD) versus YTD Goal percent returns.
% of Store	Shows the percentage when comparing Year To Date (YTD) versus YTD store percent returns.


Award Table











Heading	Description
Counter Person	Displays the name of the counter user.
Actual Sales	Shows the actual month to date sales amount.
Goal	Shows the month to date sales goal amount.
Difference	Shows the dollar amount difference between the actual month to date sales and goal amounts (Actual Sales – Goal). A positive dollar difference means the counterperson has met their goal.
% Award	Shows the award percentage setup for the counterperson.
Award \$\$	Shows the calculated award dollar amount. Award dollars are calculated based upon a positive dollar difference amount multiplied by the award percentage. <u>Note:</u> nothing is calculated unless a positive dollar difference amount exists.


Alerts & Notifications


☞ (All items below display when the Counter role is NOT set as Limited)


From the user's home screen, if any alerts or notification has been setup and/or met by the administrator, they will be displayed below the [Alerts & Notifications](#) heading section when the tile is clicked on as shown:



Alerts & Notifications

	-	Notification 1 New Alert High Priority
	-	Notification 2 New Alert Med Priority
	-	Notification 3 New Alert Low Priority
	271 - ROY DAVID BETANCUR (A)	No Purchases for 12 days (Not Purchasing In 5 Days (Cust > \$100 Last 30))
	250 - AMERICAN ACRYLIC	Above 34.03% of Average Daily Purchases
	256 - DIETERS V W REPAIR	Above 1085.71% of Average Daily Purchases
	258 - FORD ELECTRONICS	Above 1106.90% of Average Daily Purchases
	271 - ROY DAVID BETANCUR (A)	Above 549.15% of Average Daily Purchases
	276 - TINA FOSTER (RB)	Above 1110.29% of Average Daily Purchases
	250 - AMERICAN ACRYLIC	Low Brake Purchases, Low Chassis Purchases, Low Exhaust Purchases, Low Battery Purchases, Low Tool Purchases (Talking Points)
	251 - CERTIFIED APPLIANCE	March Specials, Brake Recon Clinic, Mechanic Of The Year Nominee (Talking Points)


Schedule


Customer List

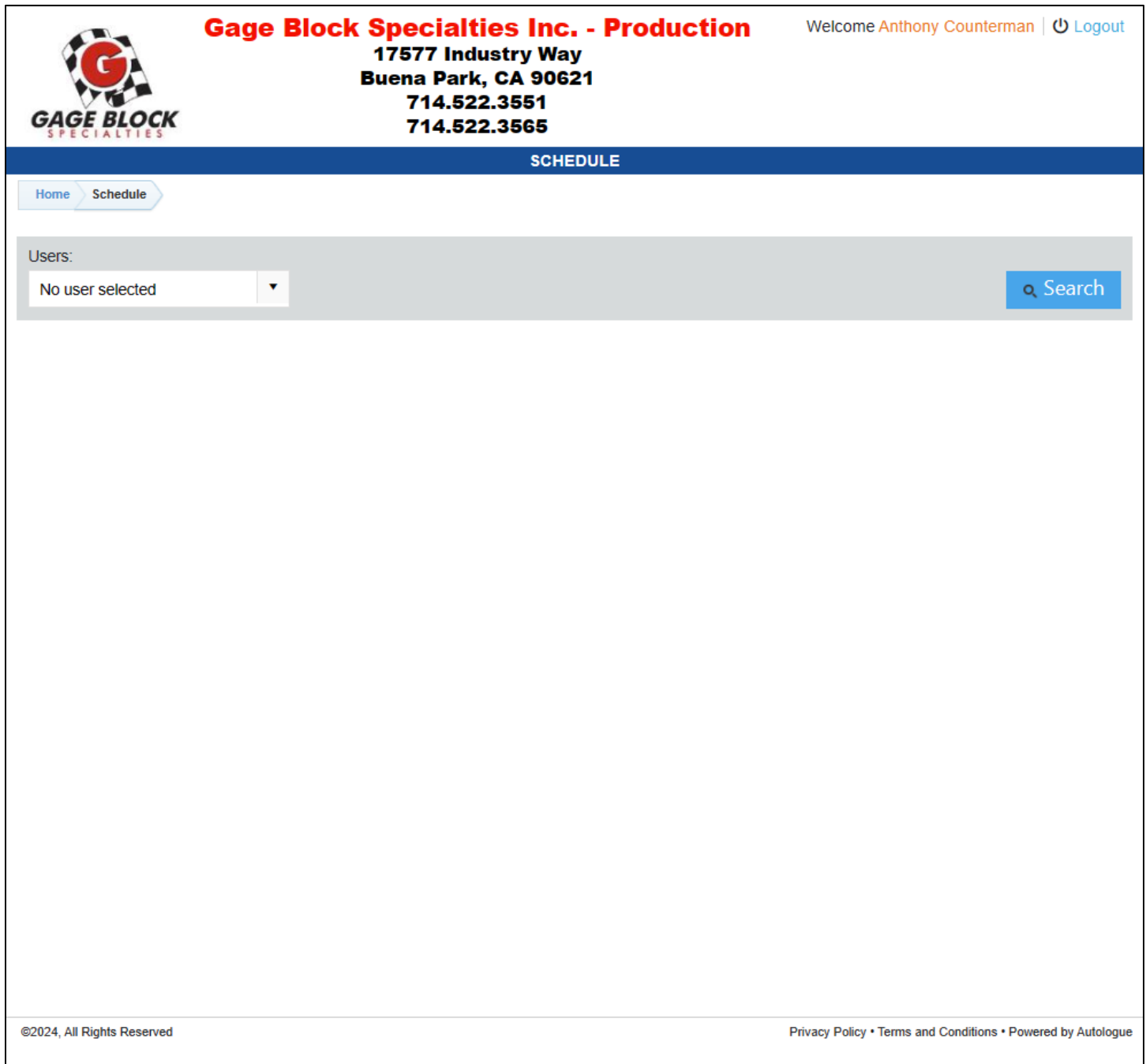

Search Notes


Links

The screen above shows an example of alerts for customers who have not made a purchase in the past number of days. Notifications are always listed first and alerts second.

Schedule

- From the user's home screen, to view the scheduler, click on the [Schedule](#) menu tile.



Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome **Anthony Counterman** | [Logout](#)

SCHEDULE

[Home](#) [Schedule](#)

Users:

No user selected ▼

[Search](#)

©2024, All Rights Reserved Privacy Policy • Terms and Conditions • Powered by Autologue

- By default, no user is selected. A sales user must be selected to view their schedule.
- ☞ ****NOTE**** The Counter user can only view Sales users' schedules, they may not add or change appointments.

Selecting A User To View

- You can select a specific user to view schedule information for by clicking on the down arrow button at the end of the **Users** field and then clicking on the specific user you want to report on from the drop-down selection list.
- Now click on the **Search** button and the screen will then redraw the screen with the schedule information for the selected user.

Day Schedule View

By default, the screen will display a daily schedule view as shown:

The day schedule view shows all appointments only for the specific day.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the specific calendar day to view.

Appointment Background Colors

The screenshot displays the 'SCHEDULE' interface. At the top, there are tabs for 'Home' and 'Schedule'. Below these, there's a section for 'Import Appointments' and buttons for '+ Add Prospective Customer' and 'Export'. A 'Users' dropdown menu shows 'Sam Salesman'. A search bar is also present. The main area shows a timeline for 'Tuesday, August 26, 2025'. The timeline has a vertical axis with time slots from 5:00 am to 11:00 am. The horizontal axis has tabs for 'Day', 'Week', 'Month', and 'Timeline'. The timeline shows several appointments as horizontal bars. Callouts explain the color coding: light blue for initial appointments, light red for appointments not accepted via email, and light green for appointments accepted via email. A note icon is also shown, indicating that appointments created via the note icon are color coded with a light blue background. The appointments listed are: 299 GOODYEAR ANAHEIM (C) - 951-683-2121 (Sales Visit, light blue), 268 LA FITNESS PAINT (C) - (714) 449-0156 (Sales Visit, light red), 258 CLIFFHILL ELECTRONICS - 909-781-9411 (Sales Visit, light red), and 512 O'REILLY AUTO PARTS (6TH) (RB) - 951-333-3333 (Sales Visit, light green).

SCHEDULE

Home Schedule

Import Appointments + Add Prospective Customer Export

Users: Sam Salesman Search

Search Schedule >

today Tuesday, August 26, 2025 Day Week Month Timeline

all day

5:00 am

5:30 am

6:00 am

6:30 am 299 GOODYEAR ANAHEIM (C) - 951-683-2121
Subject: Sales Visit
Type: Visit

7:00 am 268 LA FITNESS PAINT (C) - (714) 449-0156
Subject: Sales Visit
Type: Visit

7:30 am

8:00 am

8:30 am

9:00 am 258 CLIFFHILL ELECTRONICS - 909-781-9411
Subject: Sales Visit
Type: Visit

9:30 am

10:00 am 512 O'REILLY AUTO PARTS (6TH) (RB) - 951-333-3333
Subject: Sales Visit
Type: Visit

10:30 am

11:00 am

Red customer number and name text means the customer's account code flag has been set.

When a note has been created via the note icon, the appointments are color coded with a light blue background.

Initial appointments created are color coded with a gray background.

When an appointment was NOT accepted by the customer via email, the appointments are color coded with a light red background.

When an appointment was accepted by the customer via email, the appointments are color coded with a light green background.

Background Color	Description
Light Gray	When appointments are initially created, it will have a light gray background.
Light Blue	When a note has been created via the note icon displayed within the appointment pop-up window, the appointments will have a light blue background.
Light Red	When an appointment was NOT accepted by the customer via email, the appointments are color coded with a light red background. This requires the <i>Appointment Email Functionality</i> option to be enabled within the Admin users Settings tile.
Light Green	When an appointment was accepted by the customer via email, the appointments are color coded with a light green background. This requires the <i>Appointment Email Functionality</i> option to be enabled within the Admin users Settings tile.

If the customer number and name are displayed in red text, this means the customer's account code flag has been set. This information is setup within the *Customer Options/Favorites* section of the *Setup ePartConnection* webpage.

Week Schedule View

- To have the screen display a weekly schedule view, position the cursor over the [Week](#) column tab and click on it.

The screen will be redrawn as shown:

SCHEDULE

Home Schedule

Users:
Sam Salesman

Click on the "Week" tab to view a weekly schedule view.

Search

today 2/16/2025 - 2/22/2025

Day Week Month Timeline

	Sun, 16	Mon, 17	Tue, 18	Wed, 19	Thu, 20	Fri, 21	Sat, 22
all day							
5:00 am							
5:30 am							
6:00 am							
6:30 am			299 GOODYEAR ANAHEIM (C) - 951-683-9424				
7:00 am			268 LA FITNESS PAINT (C) - (714) 449-0156 Subject: Sales Visit Type: Visit				
7:30 am							
8:00 am					254 GENERAL OLD GOLF COURSE - 714-687-7431 Subject: Sales Visit Type: Visit	511 O'REILLY AUTO PARTS (MAGNOLIA) (RB) - 951-222-2222 Subject: Sales Visit Type: Visit	
8:30 am			262 WALGREENS SERVICE CENTER (F) - 951-776-0470 Subject: Sales Visit Type: Visit				
9:00 am				250 JOHS ACRYLIC (P) - 999-999-9999 Subject: Sales Visit			
9:30 am					257 KFC AUTOMOTIVE - 714-523-7241 Subject: Sales Visit Type: Visit		
10:00 am		252 FARMER BOYS AUTOMOTIVE - 714-738-4822	512 O'REILLY AUTO PARTS (6TH) (RB) - 951-333-3333 Subject: Sales Visit				
10:30 am		251 ORANGE TERRACE					

The weekly schedule view shows all appointments only for the current week.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next week's schedule information.

Month Schedule View

- To have the screen display a monthly schedule view, position the cursor over the **Month** column tab and click on it.

The screen will be redrawn as shown:

SCHEDULE

Home Schedule

Users:
Sam Salesman

Click on the "Month" tab to view a monthly schedule view.

Search

today Apr, 2025 Day Week **Month** Timeline

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1 Apr	2	3	4	5
	<p>252 FARMER BOYS AUTOMOTIVE - 714-738-1822</p> <p>251 ORANGE TERRACE COMMUNITY PARK - (714)587-7485</p>	<p>299 GOODYEAR ANAHEIM (C) - 951-683-2121</p> <p>268 LA FITNESS PAINT (C) - (714) 449-0156</p> <p>Subject: Sales Visit</p> <p>more...</p>	<p>250 JOHS ACRYLIC (P) - 999-999-9999</p> <p>Subject: Sales Visit</p>	<p>254 GENERAL OLD GOLF COURSE - 714-687-7431</p> <p>Subject: Sales Visit</p> <p>257 KFC AUTOMOTIVE - 714-523-7241</p> <p>Subject: Sales Visit</p>	<p>511 O'REILLY AUTO PARTS (MAGNOLIA) (RB) - 951-222-2222</p>	<p>PRO-457-1Test QA_Pro-2</p> <p>Subject: Sales Visit</p> <p>254 GENERAL OLD GOLF COURSE - 714-687-7431</p> <p>Subject: Sales Visit</p>
6	7	8	9	10	11	12
	<p>252 FARMER BOYS AUTOMOTIVE - 714-738-1822</p> <p>251 ORANGE TERRACE COMMUNITY PARK - (714)587-7485</p>	<p>299 GOODYEAR ANAHEIM (C) - 951-683-2121</p> <p>268 LA FITNESS PAINT (C) - (714) 449-0156</p> <p>Subject: Sales Visit</p> <p>more...</p>	<p>250 JOHS ACRYLIC (P) - 999-999-9999</p> <p>Subject: Sales Visit</p>	<p>254 GENERAL OLD GOLF COURSE - 714-687-7431</p> <p>Subject: Sales Visit</p> <p>257 KFC AUTOMOTIVE - 714-523-7241</p> <p>Subject: Sales Visit</p>	<p>511 O'REILLY AUTO PARTS (MAGNOLIA) (RB) - 951-222-2222</p>	<p>PRO-457-1Test QA_Pro-2</p> <p>Subject: Sales Visit</p> <p>254 GENERAL OLD GOLF COURSE - 714-687-7431</p> <p>Subject: Sales Visit</p>
13	14	15	16	17	18	19
	<p>252 FARMER BOYS AUTOMOTIVE - 714-738-1822</p> <p>251 ORANGE TERRACE COMMUNITY PARK - (714)587-7485</p>	<p>299 GOODYEAR ANAHEIM (C) - 951-683-2121</p> <p>268 LA FITNESS PAINT (C) - (714) 449-0156</p> <p>Subject: Sales Visit</p> <p>more...</p>	<p>250 JOHS ACRYLIC (P) - 999-999-9999</p> <p>Subject: Sales Visit</p>	<p>254 GENERAL OLD GOLF COURSE - 714-687-7431</p> <p>Subject: Sales Visit</p> <p>257 KFC AUTOMOTIVE - 714-523-7241</p> <p>Subject: Sales Visit</p>	<p>511 O'REILLY AUTO PARTS (MAGNOLIA) (RB) - 951-222-2222</p>	<p>PRO-457-1Test QA_Pro-2</p> <p>Subject: Sales Visit</p> <p>254 GENERAL OLD GOLF COURSE - 714-687-7431</p> <p>Subject: Sales Visit</p>
ents.aspx#	21	22	23	24	25	26

The monthly schedule view shows all appointments only for the current month.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next month's schedule information.

Timeline Schedule View

- To have the screen display a three-day timeline schedule view, position the cursor over the [Timeline](#) column tab and click on it.

The screen will be redrawn as shown:

SCHEDULE

Home Schedule

Users: Sam Salesman

Click on the "Timeline" tab to view a 3 day timeline schedule view.

Search

today 4/7/2025 - 4/9/2025 Day Week Month **Timeline**

4/7/2025	4/8/2025	4/9/2025
252 FARMER BOYS AUTOMOTIVE - 714-738-1822 Subject: Sales Visit Type: Visit	299 GOODYEAR ANAHEIM (C) - 951-683-2121 Subject: Sales Visit Type: Visit	250 JOHS ACRYLIC (P) - 999-999-9999 Subject: Sales Visit Type: Visit
251 ORANGE TERRACE COMMUNITY PARK - (714)587-7485 Subject: Sales Visit Type: Visit	268 LA FITNESS PAINT (C) - (714) 449-0156 Subject: Sales Visit Type: Visit	
	512 O'REILLY AUTO PARTS (6TH) (RB) - 951-333-3333 Subject: Sales Visit Type: Visit	

The timeline schedule view shows all appointments only for a 3-day period.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next 3-day timeline schedule information.

Viewing Appointment Details

- With the schedule screen displaying appointments in any of the four different views (day, week, month, timeline), you can view the appointment details by placing the mouse pointer over the appointment cell and left clicking on it.

The appointment details will pop-up on the screen as shown:

The screenshot displays the 'SCHEDULE' interface. At the top, there's a navigation bar with 'Home' and 'Schedule' tabs. Below this, a 'Users' dropdown menu is set to 'Sam Salesman', and a 'Search' button is visible. The main area shows a calendar for 'Thursday, July 31, 2025' in 'Day' view. A list of appointments is shown on the left, with two appointments visible: one at 8:00 am and another at 9:30 am. A callout box points to the 8:00 am appointment cell, indicating that left-clicking will display a pop-up window. The pop-up window shows the following details:


- Customer: 254 - GENERAL OLD GOLF COURSE
- Appointment Type: Visit
- Starts on: 07/31/2025 08:00
- Ends on: 07/31/2025 09:00
- Subject: Sales Visit
- Description:
- Created By: Joe Owner
- Modified By: -

- To remove the appointment details pop-up window, click anywhere else on the screen.

Entering A Customer Note From An Appointment

- With the schedule screen displaying appointments in the day view, left click within an appointment cell to view the appointment details (anywhere except the customer's name). You can enter a customer note by left clicking on the customer notes icon (📝).

A customer note pop-up window will now be displayed on the screen and will display any note entry information for the customer as shown:



Gage Block Specialties Inc. - Production
 17577 Industry Way
 Buena Park, CA 90621
 714.533.3554

Welcome **Anthony Counterman** | Logout

8 Note(s)

Clear Modified Flag(s)

Add +

Created For: *F & R PAINT (C) (268)* Created By: Sam Salesman Created On: 2/27/2024 12:58:45 AM Importance: High Departmental Action Needed: Addition 1 Response 1 Addition 2: Addition 2 Response 2 Amount Collected: test extract Money Collected: Y TEST 6 ADDITION: RESPONSE FOR ADDITION 6

testsm

Created For: *F & R PAINT (C) (268)* Created By: Sam Salesman Created On: 12/5/2023 7:34:32 AM Outcome: Changeover Completed Importance: Medium

TESTEST

Created For: *F & R PAINT (C) (268)* Created By: Anthony Counterman Created On: 12/5/2023 12:28:06 AM Modified By: Anthony Counterman Modified On: 12/5/2023 12:28:26 AM Outcome: Follow Up testAddition@S#FD: Yes

testCounter

Created For: *F & R PAINT (C) (268)* Created By: Joe Owner Created On: 9/13/2023 2:06:14 PM Modified By: Anthony Counterman Modified On: 12/5/2023 12:28:14 AM Outcome: Follow Up

Test note entry via Workday.

Created For: *F & R PAINT (C) (268)* Created By: Sam Salesman Created On: 2/7/2023 7:43:44 AM Modified By: Mike Sales Manager Modified On: 2/10/2023 9:39:26 AM testAddition@S#FD: Addition1 Response2

10:30 am

type: visit

Description:

Created By: Sam Salesman

Modified By: Sam Salesman

Show 24 hours...

- To add a note, click on the (Add +) button.

The following note entry pop-up screen will be displayed:

- Click within the blank field and enter in the new note information.
- If “Outcome” or “Importance” options have been activated, select an Outcome or Importance from the drop-down below the note text box before saving/emailing.
- ☞ **Note:** Fields that have a red asterisk displayed (*) indicates it is a required field and must have an entry selected before the note can be saved.
- Once the note has been entered and the optional fields have been selected, click on the Save (💾) icon to save the entered note. You also have the option to both save the entered note and have it emailed by clicking on the Save and Email (✉) icon.

Existing note entries display the previous notes completed, who it was created by, the created date and time, and the date and time last modified, if it was modified after the initial note was written.

- An existing note entry can be modified by clicking on the edit note (✎) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry.
- Click on the cancel (✕) icon to close the customer notes pop-up window and you will be returned to the schedule screen.

Customer List

- From the user's home screen, to access all customers or just customers for selected salespersons, click on the [Customer List](#) menu tile and the following screen will be displayed:

Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome **Anthony Counterman** | [Logout](#)

CUSTOMERS

Home Customers [Save Search Criteria](#)

Ranking: No ranking code selected ▼ Number/Name: Search here... Store ID: Choose Store ID(s) ▼ Salesperson Code: No salesperson code s... ▼ [Search](#)

Select a letter or a number to view customers beginning with that character or select All

PRO- ALL A B C D E F G H I J K L M N O P Q R S
T U V W X Y Z 1 2 3 4 5 6 7 8 9

Click within the Ranking and select specific code(s) to search for.

Click within the Number/Name and enter a value to search for.

Click within the Store ID and select specific Store ID(s) to search for.

Click within the Salesperson Code and select specific code (s) to search for.

Click on the Search button.


©2025, All Rights Reserved [Privacy Policy](#) • [Terms and Conditions](#) • Powered by Autologue

By default, no customers are displayed on the screen.

Viewing Customers

- Click on a red letter or a number to view customers whose name begins with that letter, or click on the [ALL](#) button to see all customers assigned to the user's store.

The button to the left of the [ALL](#) button, in this case ([PRO-](#)), is used to view all prospective customers assigned to your store. These prospects would have been added by an administrator, store manager, or a sales manager/representative.



Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome **Anthony Counterman** | [Logout](#)

CUSTOMERS

[Home](#) > [Customers](#)

Save Search Criteria

Ranking: No ranking code selected ▼

Number/Name:

Store ID: Choose Store ID(s) ▼

Salesperson Code: No salesperson code s... ▼





Search

Select a letter or a number to view customers beginning with that character or select All

PRO-
ALL
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S

T
U
V
W
X
Y
Z
0
1
2
3
4
5
6
7
8
9

11 Customer(s)

Number	Name	Store ID	Salesperson	Prev Day	Sales MTD	Sales LYMTD	% Change	Sales YTD	Sales LYTD	% Change	Date La Note
330	AAA NEW CUSTOMER (RB) 	ROYSTEST3	Tom Salesman (T)	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$25.00	-100.00%	07/07/202
249	ABC AUTO PARTS 	ROYSTEST3	Mike Salesman (M)	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	05/06/202
150	ABC WAREHOUSE INC.	ROYSTEST3		\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	04/29/202
292	ACE HARDWARE (RB) 	ROYSTEST3	Rob Salesman (R)	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$100.00	-100.00%	06/18/202
250	AMERICAN ACRYLIC 	roystest3	Sam Salesman (S)	\$100.00	\$100.00	\$200.00	-50.00%	\$2,659.38	\$2,296.32	15.81%	07/07/202
301	ANDY BANUELOS	ROYSTEST3	Rob Salesman	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	05/07/202

If the customer number and name are displayed in red text, this means the customer's account code flag has been set.

If an orange bell icon is displayed beside the customer's name, this denotes an existing note has been modified for them.

Beside each customer name that is listed will be their assigned ranking code (shown in blue parenthesis), assigned store ID, assigned salesperson (salesperson's code shown in blue parenthesis), as well as each customer's sales totals for the previous day, month to date, last year month to date, year to date, last year to date with the % of change for each period over the same period last year, and the date of the last note taken.

- Clicking on a column header will sort the list by that column in either ascending or descending order.

Search By Ranking

Within the *Customers* screen, you can search for customers by a specific ranking code.

- Click within the [Ranking](#) search field, select from a drop-down list of ranking codes to be search by and then click on the blue [Search](#) button. The screen will then display only the customers with a matching ranking code(s).

Search By Name/Number

- Click within the [Name/Number](#) search field and enter a customer number or any portion of the customer's name to search by and then click on the blue [Search](#) button. The screen will then display only the customers with matching data.

Search by Store ID

Within the *Customers* screen, you can search for customers by your specific store ID.

- Click within the [Store ID](#) search field, select your specific store ID's to be search by and then click on the blue [Search](#) button. The screen will then display only the customers that are assigned to your specific store ID.

Search by Salesperson Code

Within the *Customers* screen, you can search for customers by a specific salesperson code.

- Click within the [Salesperson Code](#) search field, select from a drop-down list of salesperson codes to be search by and then click on the blue [Search](#) button. The screen will then display only the customers with a matching salesperson code(s).

Saving Search Criteria

- To save the current search criteria, click on the blue [Save Search Criteria](#) button. The button text will change (or toggle) to display [Clear Search Criteria](#) and this indicates that there is a saved search.

The current search criteria will automatically be displayed when clicking on the Customers tile from the home page. Logging out will not clear the saved search.

Clearing Search Criteria

- To clear the current search criteria, click on the blue [Clear Search Criteria](#) button. The button text will change (or toggle) to display [Save Search Criteria](#) and this indicates that there is not a saved search.

Exporting Customer List Results

- Click on the green **Export** button to export all the column information for the customer list currently being displayed on the screen to an Excel spreadsheet file (*CustomerList_Export.xlsx*).

CUSTOMERS

[Home](#)
[Customers](#)

[Import/Export 'About Customer' Info](#)
[+ Add Prospective Customer](#)
[Save Search Criteria](#)
[Export](#)

Ranking: No ranking code selected
Number/Name:
Store ID: Choose Store ID(s)
Salesperson Code: No salesperson code s...
[Search](#)

Select a letter or a number to view customers beginning with that character or select All

PRO- ALL A B C D E F G H I J K L M N O P Q R S

T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

3 Customer(s)

Number	Name	Store ID	Salesperson	Prev Day	Sales MTD	Sales LYMTD	% Change	Sales YTD	Sales LYTD	% Change	Date Last Note
504	ARMANDO HERNANDEZ (RB)	ROYSTEST3	Sam Salesman (S)	\$0.00	\$0.00	\$0.00	0.00%	\$70.00	\$0.00	100.00%	08/18/2025
PRO-AV	Art Valencia	ROYSTEST3	Sam Salesman	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	0.00%	
510	AUTOZONE AUTO PARTS (CORONA) (RB)	ROYSTEST3	Sam Salesman (S)	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$245.00	-100.00%	03/26/2025

◀

1

▶

3 items in 1 pages

Shown below is example of the export file:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Number	Name	Ranking	Store ID	Salesperson	Prev Day	Sales MTD	Sales LYMTD	% Change	Sales YTD	Sales LYTD	% Change (2)	Date Last Note
2	504	ARMANDO HERNANDEZ	RB	ROYSTEST3	Sam Salesman	0.00	0.00	0.00	0.00	70.00	0.00	100.00	08/18/2025
3	PRO-AV	Art Valencia		ROYSTEST3	Sam Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
4	510	AUTOZONE AUTO PARTS (CORONA)	RB	ROYSTEST3	Sam Salesman	0.00	0.00	0.00	0.00	0.00	245.00	-100.00	03/26/2025
5													

Customer Navigation

- From the *CUSTOMERS* home screen and the list of customers being displayed, click on the customer's name and the following screen will be displayed:

CUSTOMER NAVIGATION

Home Customer Navigation

250 - Johs Acrylic (P)

999-999-9999

Customer Number, Name, Ranking Code & Phone Number.

About Customers

ePartConnection

eOffice

Business Intelligence

Notes

Tasks

Directions

Alerts

Name	Message
	Down 44.91% of Average Daily Purchases
Discussion Topics	Low Brake Purchases, Low Chassis Purchases, Low Exhaust Purchases, Low Battery Purchases, Low Tool Purchases (Discussion Topics)

1

Page size: 10

2 Alerts & Notifications matching your search criteria

Upcoming Appointments

The *CUSTOMER NAVIGATION* screen will now be displayed for the selected customer (whose customer number, name and phone number are displayed above the colored tiles).

Displayed below the colored tiles, are specific sections that display alerts and upcoming appointments for the selected customer.

Here the user can perform the following for the selected customer:

<ul style="list-style-type: none"> About Customers: View/Add additional business & personal information. 	<ul style="list-style-type: none"> ePartConnection: Automatically login to ePartConnection as the customer. This tile is only visible if your company subscribes to ePartConnection.
<ul style="list-style-type: none"> eOffice: Automatically login to eOffice as the customer. This tile is only visible if your company subscribes to eOffice. 	<ul style="list-style-type: none"> Business Intelligence: View a sales dashboard.
<ul style="list-style-type: none"> Notes: View/Add customer notes information. 	<ul style="list-style-type: none"> Tasks: View pending tasks for this customer.
<ul style="list-style-type: none"> Directions: Displays a map with directions to the selected customer. 	<ul style="list-style-type: none"> Alerts: Displays specific alerts pertaining to the selected customer.
<ul style="list-style-type: none"> Upcoming Appointments: Displays upcoming appointments within the scheduler for the next 30 days and the specific workday # the customer is currently on. 	

About Customers

- From the *CUSTOMER NAVIGATION* screen, click on the [About Customers](#) tile and the following screen will be displayed:

CUSTOMER DETAIL

[Home](#)
[Navigation](#)
[Details](#)

Click on the blue Edit button to change any of the field information.

250 - Johns Acrylic (P)

Business Details

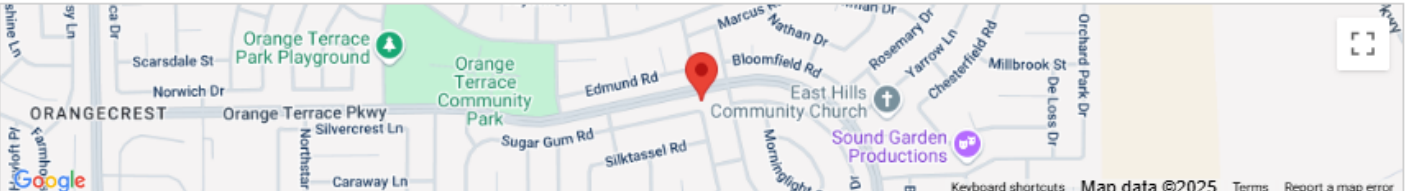
Address	Email:	City:
Street: 20476 SUGAR GUM ROAD	ROY@AUTOLOGUE.COM	RIVERSIDE
State: CA	Country: USA	Zip: 92508

GPS Coordinates:

Latitude: 33.8951352

Longitude: -117.3051533

[Override GPS Coordinates:](#)
Address:



[Directions](#)

Contact Details

Phone No. 1 999-999-9999	Phone No. 2: 714-522-3551
-----------------------------	------------------------------

Business

Type of Business: Garage	Business Hours: 8-5	Size of Business: 5 Bays - 3 techs
Authorized Signer 1: Joe Owner	Authorized Signer 2: Jane Owner	

Other Details

Alpha Acct #: L	Home Loc: 9.5	Ship Via: 9.5
Matrix: 1.22_26 Stage-Prod	Group: 2.700_5.0 Stage-Prod	Program: 6
Nat Acct #: 7	Start Date: 8	AR Balance: 9

The *CUSTOMER DETAIL* screen will be displayed and will be displaying the entered business information (address, GPS coordinates, contact details, business type/hours/size, authorized signers, other details, and notes) for the selected customer.

The **GPS Coordinates:** heading will display either **GPS Coordinates**, **Imported GPS Coordinates**, or **Overridden GPS Coordinates** depending on how the latitude/longitude coordinates were created. Shown below are how each is determined:

GPS Coordinates:	Uses the street address information that is entered within the <i>ePart Setup->Customer Options</i> screen and plots to valid latitude/longitude values.
GPS Coordinates:	Uses the street address information that is entered within the <i>ePart Setup->Customer Options</i> screen but is an invalid address and does NOT plot to valid latitude/longitude values.
Imported GPS Coordinates:	Uses the latitude and longitude values that are entered within the <i>ePart Setup->Customer Options</i> screen.
Overridden GPS Coordinates:	Uses the street address that is entered within the <i>Override GPS Coordinates->Address</i> field.

- To edit any of the existing business information, click on the blue edit (✎) icon, and then click within any of the fields within the *Override GPS Coordinates*, *Contact Details & Business* sections and make your changes and then click on the blue **Save** button.

☞ **Note:** The Phone No. 1 field cannot be edited; It can only be changed within the *ePart Setup->Customer Options*.

- At the bottom of the screen are *Owner/Employee/Personal Details* heading sections. These sections are used to enter in your customer's owners as well as their employees CRM information:

Owner Details

+ Add new record

Click on the + Add new record button within any of the detail sections to add new record information.

Type	Name	DOB	Email	Cell Phone	Related to		
Child	Gil Campa		gcampa@gmail.net	19092113333	Owner1		
Child	Joe Smith		joe@gmail.com	714-555-1697	Owner1		
Child	D T				Owner1		
Spouse	Nancy Camp	10/22/1945	ncampa@gmail.net	909-239-5974	Owner1		
Spouse	Nancy Campa	02/01/1946	ncampa@gmail.net	909-239-5974	Owner1		
Owner	Tom Campa	01/01/1948	tcampa@gmail.net	555-444-3333	Owner1		
Child	Vlnay	08/03/2021	dheeraj.tiwari@beyondkey.com	9898989898	Owner1		
Child	Gil Campa		gcampa@gmail.net	909.211.3333	Owner2		

1

Page size: 10

8 items in 1 pages

Employee Details

+ Add new record

Name	DOB	Email	Cell Phone	Job Title		
Arti	09/27/1997	Arti.dhuriya@beyondkey.com	5656787687	QA		

- To add CRM record information within any of the listed sections, click on the + Add new record button within their respective detail sections and the screen will now display a new row of blank entry fields. Enter in the detail's information (type, name, date of birth, email, cell phone, job title, relationship, hobbies, favorite sport, favorite car) and then click on the (✓) symbol to save the entered information.
- To edit CRM record information within any of the listed sections, click on the () symbol besides the row of fields information and the fields will now be shown as entry fields. Edit any of the details information and then click on the (✓) symbol to save the updated information.

ePartConnection

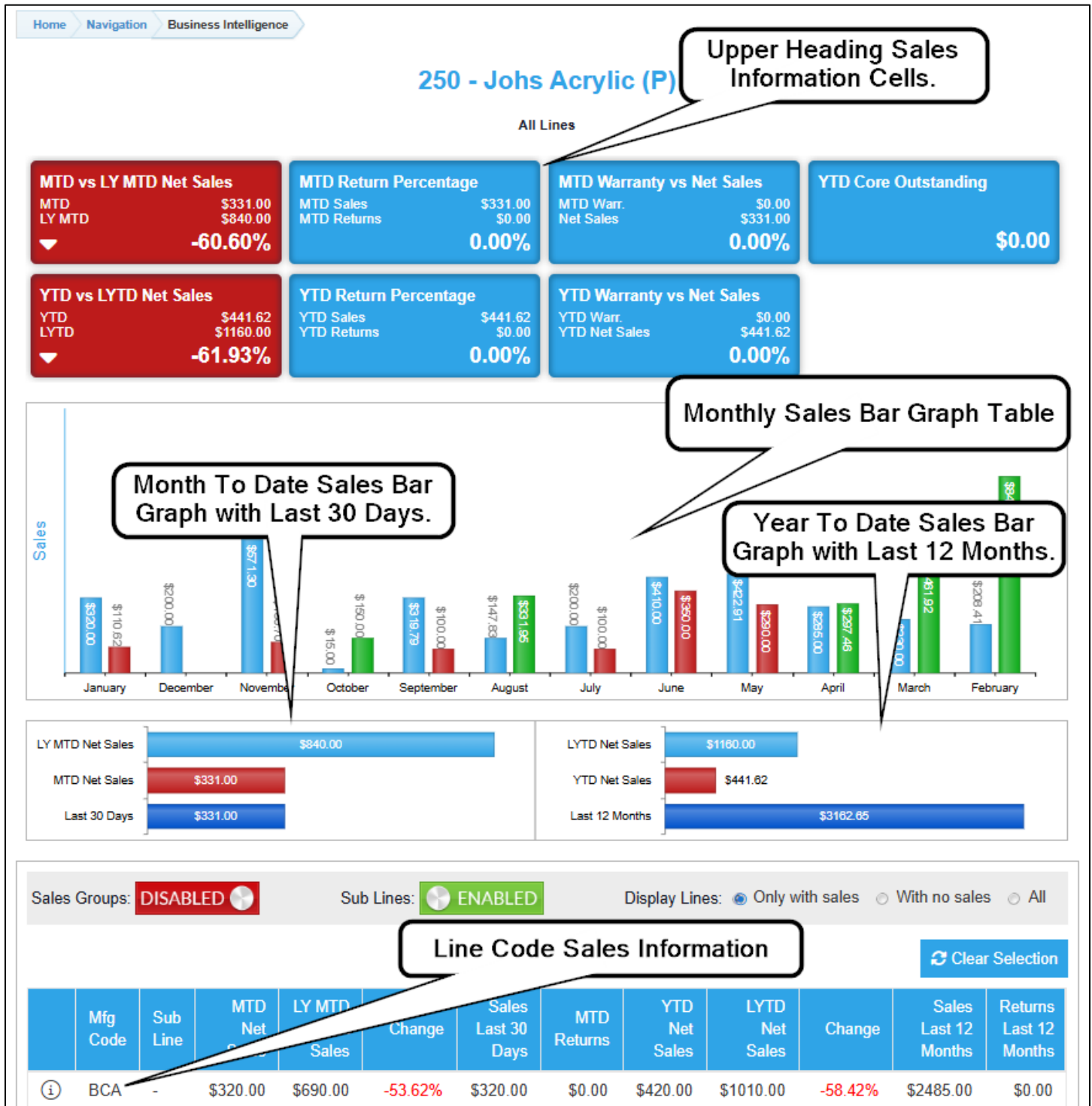
- From the *CUSTOMER NAVIGATION* screen, click on the [ePartConnection](#) colored menu tile and the ePart will be opened and you will be automatically logged into the customer's account within ePartConnection. Note: This tile is only visible if your company subscribes to ePartConnection.

eOffice

- From the *CUSTOMER NAVIGATION* screen, click on the [eOffice](#) colored menu tile and a new webpage tab will be opened and you will be automatically logged into the customer's account within eOffice. Note: This tile is only visible if your company subscribes to eOffice.

Business Intelligence

- From the *CUSTOMER NAVIGATION* screen, click on the [Business Intelligence](#) tile and the following screen will be displayed:



This screen is a graphical “sales dashboard” of the customers sales from the past year on up through the current date. It displays a variety of graphed sales figures as well as dollar values for the various types of returns (core/inventory/warranty). It also shows the percentage changes (positive/negative) based up comparisons from last year versus this year sales. The screen is broken up in 4 sections:

1. Upper Heading Sales Information Cells
2. Monthly Sales Bar Graph Table
3. Month/Year To Date Sales Bar Graphs
4. Line Code Sales Information

Upper Heading Sales Information Cells Section

Heading	Description
MTD vs LY MTD Sales	Shows the Month To Date (MTD) sales dollar amount and the percentage difference when compared to Last Year (LY) Month To Date (MTD) sales dollar amount. The small dollar amount displayed is the current month to date sales. The box will either show in red if the percentage is down (denoted by a down arrow) or in green if the percentage is up (denoted by an up arrow). To view the Last Year (LY) Month To Date (MTD) sales dollar amount, hover over either of the bar graphs within the Month To Date Sales Bar graph section of the screen.
MTD Returns vs Sales	Shows the Month To Date (MTD) inventory returns dollar amount and its percentage when compared to the Month To Date sales dollar amount. The small dollar amount displayed is the current month to date inventory returns sales. The large percentage figure is the return percentage (MTD Returns ÷ MTD Sales*100).
MTD Warranty vs Sales	Shows the Month To Date (MTD) warranty returns dollar amount and its percentage when compared to Month To Date sales dollar amount. The small dollar amount displayed is the current month to date warrant returns sales. The large percentage figure is the warranty return percentage (MTD Warranty ÷ MTD Sales*100).
YTD vs LYTD Sales	Shows the Year To Date (YTD) sales dollar amount and the percentage difference when compared to Last Year To Date (LYTD) sales dollar amount. The small dollar amount displayed is the current year to date sales. The box will either show in red if the percentage is down (denoted by a down arrow) or in green if the percentage is up (denoted by an up arrow). To view the Last Year To Date (LYTD) sales dollar amount, hover over either of the bar graphs within the Year To Date Sales Bar graph section of the screen.
YTD Returns vs Sales	Shows the Year To Date (YTD) inventory returns dollar amount and its percentage when compared to the Year To Date sales dollar amount. The small dollar amount displayed is the current year to date inventory returns sales. The large percentage figure is the return percentage (YTD Returns ÷ YTD Sales*100).
YTD Warranty vs Sales	Shows the Year To Date (YTD) warranty returns dollar amount and its percentage when compared to Year To Date sales dollar amount. The small dollar amount displayed is the current year to date warrant returns sales. The large percentage figure is the warranty return percentage (YTD Warranty ÷ YTD Sales*100).
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Monthly Sales Bar Graph Table Section

The second section of the screen, just below the upper heading cells section, displays the monthly sales bar graph data for current and last year's sales dollars.

☞ **Note:** A pop-up window showing the exact dollar figures, month and year is automatically displayed whenever you "hover" the mouse pointer over any of bar code graphs.

Month/Year To Date Sales Bar Graphs Section

The third section of the screen, just below the monthly sales bar graph section, displays the month and year to date sales dollars versus last month and current sales dollars to date.

☞ **Note:** These figures are based on "to date" which means if we are 15 days into the current month and 180 days into the current year, the LY (last year) MTD (month to date) and YTD (year to date) sales figures are based upon those day amounts. The graphs also show the Last 30 Days and Last 12 Months.

Line Code Sales Information Section

☞ **Note:** Clicking on any line, sales group total line or line and sub line inside a sales group will change all graphs at the top to reflect only that choice. The header at the top of the page will reflect the graphs currently displaying. All columns are sortable by clicking the column header.

Heading	Description
Line Code	The line code of the parts sold to the customer.
Sub Line	Sub Line for classifying certain parts in a Product Line, differentiating them from other parts in the Line.
LY MTD	Shows the Last Year (LY) Month To Date (MTD) sales dollar amount for the line code.
MTD	Shows the Month To Date (MTD) sales dollar amount for the line code.
Change	Shows the percentage difference when comparing the Month To Date (MTD) versus Last Year (LY) Month To Date (MTD) sales dollar amounts.
Sales Last 30 Days	Last 30 calendar days sales. This is helpful during the first days of a new month or year.
MTD Returns	Shows the Month To Date (MTD) inventory returns dollar amount.
LYTD Net Sales	Shows the Last Year To Date (LYTD) sales dollar amount for the line code.
YTD Net Sales	Shows the Year To Date (YTD) sales dollar amount for the line code.
Change	Shows the percentage difference when comparing the Year To Date (YTD) versus Last Year To Date (LYTD) sales dollar amounts.
Sales Last 12 Months	Last 12 calendar month's sales. This is helpful during the first days of a new month or year.
Returns Last 12 Months	Last 12 calendar month's returns dollar amount.
YTD Core Outstanding	Shows the Year To Date (YTD) outstanding cores dollar amount. This represents the amount of cores charged for and not yet returned.

Sales Groups: **DISABLED** Sub Lines: **ENABLED** Display Lines: ☒ All ☐ With no sales ☐ Only with sales

[Clear Selection](#)

	Mfg Code	Sub Line	LY MTD Net Sales	MTD Net Sales	Change	Sales Last 30 Days	MTD Returns	LYTD Net Sales	YTD Net Sales	Change	Sales Last 12 Months	Returns Last 12 Months	YTD OutSt
	A1C	19	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	
	A1C	9	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$45.74	\$0.00	-100.00%	\$0.00	\$0.00	
	ACP	1	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$153.44	100.00%	\$357.90	\$0.00	
	AIS	1	\$85.59	\$0.00	-100.00%	\$0.00	\$0.00	\$85.59	\$0.00	-100.00%	\$85.59	\$0.00	
	AIS	2	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$240.04	\$0.00	

- Clicking on the “i” icon displays Line and Sub Line descriptions as well as 3 months of sales as shown:


	Code	Line	Net Sales	Sales	30 Days	Returns	Sales
				0.00%	\$0.00	\$0.00	\$0.00
				0.00%	\$0.00	\$0.00	\$45.74
				0.00%	\$0.00	\$0.00	\$0.00
	AIS	1	\$85.59	\$0.00	-100.00%	\$0.00	\$85.59

Mfg Code: **AIS(AISIN)** | Subline: **1(WATER PUMPS)**


Sales MTD	Sales Last Mo	Sales 2M Ago
\$0.00	\$0.00	\$0.00

Sales Groups

By using the switch to “Enable” Sales Groups, the user will see a listing of pre-configured groups of Product Lines.

Sales Groups:  **ENABLED**

Display Lines: ☒ All ☐ With no sales ☐ Only with sales

 Clear Selection

Mfg Code	Subline	LY MTD Net Sales	MTD Net Sales	Change	Sales Last 30 Days	MTD Returns	LYTD Net Sales	YTD Net Sales	Change	Sales Last 12 Months	Ret Las Mon
Sales Group: Batteries											
Total		\$378.80	\$386.80	2.11%	\$647.65	\$0.00	\$6955.00	\$4885.35	-29.76%	\$17667.95	\$-1
Sales Group: Brake Pads											
Total		\$739.30	\$359.94	-51.31%	\$483.90	\$-27.99	\$4663.01	\$3169.73	-32.02%	\$16740.30	\$-1
Sales Group: Calipers											
Total		\$837.53	\$124.88	-85.09%	\$271.76	\$-146.88	\$5578.77	\$2900.53	-48.01%	\$13848.83	\$-1
Sales Group: Chassis											
Total		\$106.13	\$332.16	212.97%	\$436.70	\$0.00	\$1183.49	\$1630.78	37.79%	\$5046.74	\$-4

- The user has the option to see all lines (*All*), only lines with no sales (*With no sales*), or only lines with sales (*Only with sales*) by checking an option.
- Each group is expandable by clicking the arrow next to the name. This will display all Lines making up that group.

Sales Group: Brake Pads											
CEN	2	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$187.50	\$47.97	-74.42%	\$551.15	\$
CEN	7	\$0.00	\$52.05	100.00%	\$52.05	\$0.00	\$0.00	\$52.05	100.00%	\$99.13	\$
PSF	1	\$662.92	\$307.89	-53.56%	\$363.87	\$-27.99	\$3828.57	\$2865.77	-25.15%	\$14638.79	\$-4
PWS	1	\$76.38	\$0.00	-100.00%	\$67.98	\$0.00	\$646.94	\$203.94	-68.48%	\$1451.23	\$-1
USB	1	\$0.00	\$0.00	0.00%	\$0.00	\$0.00	\$0.00	\$0.00	0.00%	\$0.00	\$
Total		\$739.30	\$359.94	-51.31%	\$483.90	\$-27.99	\$4663.01	\$3169.73	-32.02%	\$16740.30	\$-1

- Note:** Within the Customer's BI Graph, each user can now set the view they would like to see, as it “remembers” the filter settings for Sales Groups (enabled/disabled), Sub Lines (enabled/disabled), and Display Lines (All/With no sales/Only with sales) to be displayed as set in subsequent logins.

Notes

- From the *CUSTOMER NAVIGATION* screen, click on the **Notes** colored menu tile and the screen will display any note entry information for the customer as shown:

NOTES

Home Navigation Notes

142 Note(s)

250 - Johs Acrylic (P)

Click on the customer's name hyperlink to access the Customer Navigation tiles.

Click on the Add + button to add a note.

Click on the envelope icon to email a note.

Click on the trash can icon to delete a note.

Click on the edit icon to modify a note.

Clear Modified Flag(s)

Add +

Created For: [JOHS ACRYLIC \(P\)](#) (250) Created By: Mike Sales Manager Created On: 4/29/2025 10:06:32 AM Departmental Action Needed: Pricing

Discussed their decrease in purchases within the paint lines.

Created For: [JOHS ACRYLIC \(P\)](#) (250) Created By: Sam Salesman Created On: 1/27/2025 7:54:45 AM Modified By: Mike Sales Manager

Modified On: 4/29/2025 8:50:56 AM Departmental Action Needed: No Departmental Review Needed

Note entry...edited.

Created For: [JOHS ACRYLIC \(P\)](#) (250) Created By: Sam Salesman Created On: 3/25/2025 11:42:25 PM Task: Custom Task Prod 1st Qtr 2025

test task 1469 BK

Created For: [JOHS ACRYLIC \(P\)](#) (250) Created By: Sam Salesman Created On: 2/25/2025 10:47:07 AM Departmental Action Needed: Product/Inventory

Note entry

Created For: [JOHS ACRYLIC \(P\)](#) (250) Created By: Sam Salesman Created On: 1/9/2025 2:10:34 AM Departmental Action Needed: Operations TEST 2: Y

test

The note entry displays the actual note, the creation/last modification dates, and the names of who created/modified the note entry. A note can be added by clicking on the (Add +) button. The existing note entry can be modified by clicking on the edit note (✎) icon. A note can be emailed by clicking on the envelope (✉) icon. Clicking on the trash can (🗑) icon will delete the note entry. If the Administrator has note "Outcome" enabled, you will be able to include an outcome. It may be mandatory to select before saving, if the Administrator set it that way. There are also note "Importance" and up to 10 user defined fields (UDF's) that can be setup and work the same as an outcome.

Click on the arrow icon to email a note.

Departmental Action Needed: *

☐ Money Collected
 Amount Collected:

Enter Text Here

* Indicates Required

Tasks

- From the *CUSTOMER NAVIGATION* screen, click on the [Tasks](#) tile and the screen will display any pending tasks for the customer as shown:

Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome [Anthony Counterman](#) | [Logout](#)

CUSTOMER TASKS

[Home](#)

[Navigation](#)

[Customer Tasks](#)

250 - AMERICAN ACRYLIC

Task	Assigned Salesperson	Status	Message
Fram < 30 Units 3rd Qtr 2024 (07/01/2024 - 09/30/2024)	Sam Salesman	Pending	Purchased 3 unit(s) from product line(s): FRA *
Custom Task Prod 3rd Qtr 2024 (07/01/2024 - 09/30/2024)	Sam Salesman	Pending	Task Note For 250

1

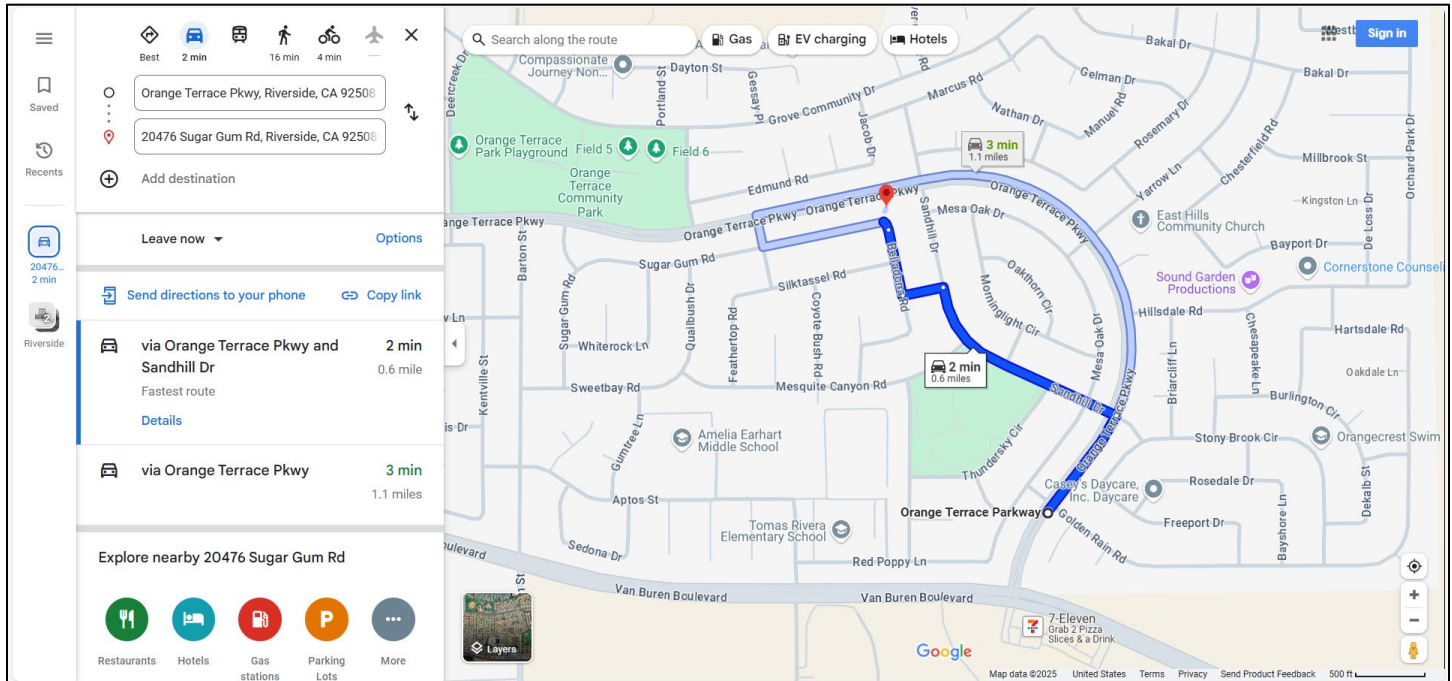
Page size: 10

2 items in 1 pages

Each task will display the assigned salesperson, its status (*Completed/Pending*) and a message. If a note has already been entered for a specific task, the *Status* column will display *Completed*.


Directions

- From the *CUSTOMER NAVIGATION* screen, click on the [Directions](#) tile and the screen will open a new tab displaying directions from the current location to the customers address as shown:



Search Notes

- From the Counterperson's home screen, to search for a note entry, click on the [Search Notes](#) menu tile and the following screen will be displayed:



Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome [Anthony Counterman](#) | [Logout](#)

SEARCH NOTES

[Home](#) [Search Notes](#)

[Email Notes](#) [Export](#)

Created By:

From Date:

To Date:

Detail:

Tasks Only:

No user selected

▼

04/12/2024

04/17/2024

☐

☐

Search

Created By	Notes
No records to display.	

◀

◀

1

▶

▶

Page size: 10 ▼

0 items in 1 pages

©2024, All Rights Reserved

[Privacy Policy](#) • [Terms and Conditions](#) • Powered by Autologue

By default, no users are selected and the [From/To](#) dates will be from 5 days prior to the current date. A user must be selected from the [Created By](#) drop-down, then the [Detail](#) and/or [Tasks Only](#) can be checked to display all note detail. If neither box is checked, the screen will display as below. The screen only displays results when you click on the blue [Search](#) button.

SEARCH NOTES

[Home](#) [Search Notes](#)

[Email Notes](#) [Export](#)

Users:

All users selected ▼

From Date:

01/01/2022

📅

To Date:

11/11/2022

📅

Detail: ☐

Tasks Only: ☐

🔍 Search

Created/Modified By	Notes Created	Notes Modified
Andy Salesman	1	
Anthony Counterman	3	1
Joe Owner	76	18
Joe Sales Manager	1	
Mike Sales Manager	12	3
Rob Salesman	1	
Sam Salesman	21	13
Store Manager	6	3
Tom Salesman	3	2

⏪ ⏩ 1 ⏪ ⏩

1

Page size: 10 ▼

9 items in 1 pages

©2025, All Rights Reserved

Privacy Policy • Terms and Conditions • Powered by Autologue

Displays the number of notes created and modified entries. Click on an entry to view a list of entries by customer.

The screen will display a **Created/Modified By** column that lists the users who have created/modified notes within the selected date range.

- Click on the number of entries under the **Notes Created** or **Notes Modified** columns to view a list of the customers that had notes created/modified.


NOTES CREATED			
Home Search Notes Customer Notes			
Tom Salesman			
Number	Name	Date Last Note	Notes
901	BETANCUR SR REPAIR	02/25/2025	1
279	DIANA HERNANDEZ	07/23/2025	1
330	WABA GRILL	12/11/2024	1
◀ ◻ ◻ 1 ▶ ▶ Page size: 10 ▼			Displays the number of note entries. Click on an entry to view the note(s).
			3 items in 1 pages
©2025, All Rights Reserved Privacy Policy • Terms and Conditions • Powered by Autologue			

The note entry displays the actual note, the creation/last modification dates, the user names of who created/modified the note entry, and the task name (if one). A note can be emailed by clicking on the envelope (✉) icon. The existing note entry can be modified by clicking on the edit (✎) icon. Clicking on the trash can (🗑) icon will delete the note entry.

- Click on the green [Export](#) button to save the notes information to an Excel spreadsheet file (*notes_export.xlsx*).

Emailing Search Notes Results

- To have the search note results emailed, click on the blue [Email Notes](#) button and the following screen will be displayed:



Gage Block Specialties Inc. - Production

17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome [Anthony Counterman](#) | [Logout](#)

SEARCH NOTES

[Home](#)
[Search Notes](#)

[Email Notes](#)
[Export](#)

Created By:

From Date:

To Date:

Detail:

Tasks Only:

All users selected

01/01/2022

11/11/2022

☐

☐

Search

Email To

Please type here

Send

Created For: [DIETERS V W REPAIR \(256\)](#) Created By: Andy Salesman Created On: 6/30/2022 10:10:01 AM Outcome: No test

Created For: [CONE CHEVROLET \(253\)](#) Created By: Anthony Counterman Created On: 9/20/2022 2:37:25 AM Modified By: Anthony Counterman
Modified On: 9/20/2022 2:37:35 AM Outcome: No Importance: Very Important testAddition@\$\$FD: Addition1 - Response2 Addition2: Addition2 - Response1 Addition4: Addition4 - Response1
test"";lbn

Created For: [AAA NEW CUSTOMER \(RB\) \(330\)](#) Created By: Anthony Counterman Created On: 9/2/2022 8:52:39 AM Outcome: Follow-up Needed Addition2: Addition2 - Response1 Addition4: Addition4 - Response1
Note entry by Anthony Counterman user.


Created For: [CANADIAN TIRE P.A.T. 303 \(RB\) \(400\)](#) Created By: Anthony Counterman Created On: 6/14/2022 10:51:57 AM Outcome: No test

Created For: [AAA NEW CUSTOMER \(RB\) \(330\)](#) Created By: Joe Owner Created On: 11/1/2022 5:16:13 AM Outcome: No Importance: Not Important testAddition@\$\$FD: Addition1 - Response2 Addition3: Addition3 - Response1
Test aarti

Created For: [AAA NEW CUSTOMER \(RB\) \(330\)](#) Created By: Joe Owner Created On: 11/1/2022 12:06:11 AM Outcome: Maybe Importance: Very Important testAddition@\$\$FD: Addition1 - Response1 Addition3: Addition3 - Response1

By default, the Email display option displays the notes information as the email would look.

- Click within the **Email To** field to view and select from a drop-down list of all the email recipients that have been setup:



Gage Block Specialties Inc. - Production
 17577 Industry Way
 Buena Park, CA 90621
 714.522.3551
 714.522.3565

Welcome **Anthony Counterman** | [Logout](#)

SEARCH NOTES

[Home](#)
[Search Notes](#)

[Email Notes](#)
[Export](#)

Created By:

From Date:

To Date:

Detail:

Tasks Only:

All users selected

01/01/2022

11/11/2022

☐

☐

Search

Email To

Sam Salesman

Send

Created For

test

Created For

Modified On

Response

test";,lbn

Created For

Response

Note entry by Anthony Counterman user.

Created For: [CANADIAN TIRE P.A.T. 303 \(RB\)](#) (400)

Created By: Anthony Counterman

Created On: 6/14/2022 10:51:57 AM

Outcome: No

test

Created For: [AAA NEW CUSTOMER \(RB\)](#) (330)

Created By: Joe Owner

Created On: 11/1/2022 5:16:13 AM

Outcome: No

Importance: Not Important

testAddition@\$\$FD: Addition1

- Response2

Addition3: Addition3 - Response1

Test aarti

Created For: [AAA NEW CUSTOMER \(RB\)](#) (330)

Created By: Joe Owner

Created On: 11/1/2022 12:06:11 AM


Outcome: Maybe

Importance: Very Important

testAddition@\$\$FD: Addition1 - Response1

Addition3: Addition3 - Response1

- Once users have been check marked for selection, click on the blue [Send](#) button, the screen should now display a green *Notes emailed successfully* message as shown:



Gage Block Specialties Inc. - Production
17577 Industry Way
Buena Park, CA 90621
714.522.3551
714.522.3565

Welcome [Store Manager](#) | [Logout](#)

SEARCH NOTES

[Home](#)
[Search Notes](#)

Notes emailed successfully

Displays the following message when emailed successfully.

Email Notes

Export

Users:

From Date:

To Date:

Detail:

Tasks Only:

Sam Salesman

02/20/2025

02/25/2025

☐

☐

Search

Email To

Andy Salesman

Send

Created For: [CLIFFHILL ELECTRONICS](#) (258) Created By: Sam Salesman Created On: 04/30/2024 01:14 AM Modified By: Sam Salesman Modified On: 02/25/2025 11:01 AM

Task: BCA < 200 Dollars 2nd Qtr 2024 Outcome: Follow Up Departmental Action Needed: Product/Inventory TEST Addition: TEST Response

Test task...modified.

Created For: [JOHS ACRYLIC \(P\)](#) (250) Created By: Sam Salesman Created On: 02/25/2025 10:47 AM Departmental Action Needed: Product/Inventory

Note entry

Created For: [GENERAL OLD GOLF COURSE](#) (254) Created By: Sam Salesman Created On: 02/25/2025 10:46 AM Departmental Action Needed: No Departmental Review Needed

Note entry.

©2025, All Rights Reserved

Privacy Policy • Terms and Conditions • Powered by Autologue

Drilling Down Into Notes

You can view or “drill down” into each of the number of note entries (listed by user) by clicking on the number of notes column to the right of the user’s name. (If the [Detail](#) field was checked, all note detail will already be on screen):

SEARCH NOTES

Home Search Notes
Email Notes Export

Users:

From Date:

To Date:

Detail: ☐

Tasks Only: ☐

Created/Modified By	Notes Created	Notes Modified
Andy Salesman	1	
Anthony Counterman	3	1
Joe Owner	76	18
Joe Sales Manager	1	
Mike Sales Manager	12	3
Rob Salesman	1	
Sam Salesman	21	13
Store Manager	6	3
Tom Salesman	3	2

Page size:

9 items in 1 pages

©2025, All Rights Reserved
Privacy Policy • Terms and Conditions • Powered by Autologue

Displays the number of notes created and modified entries. Click on an entry to view a list of entries by customer.

The screen will now display a list of customers along with the date of the last note, and the number of notes that were created/modified for the customer listed:

NOTES CREATED

[Home](#) > [Search Notes](#) > [Customer Notes](#)

Tom Salesman

Number	Name	Date Last Note	Notes
901	BETANCUR SR REPAIR	02/25/2025	1
279	DIANA HERNANDEZ	07/23/2025	1
330	WABA GRILL	12/11/2024	1

◀ ◻ ▶ ▶▶
1
▶ ▶▶


Page size: 10 ▼

Displays the number of note entries.
Click on an entry to view the note(s).


3 items in 1 pages

©2025, All Rights Reserved
Privacy Policy • Terms and Conditions • Powered by Autologue

To view the note information for the customer, click on the number of notes column to the right of the customer's name. The screen will display the note entry information for each customer as shown:



Gage Block Specialties Inc. - Production
 17577 Industry Way
 Buena Park, CA 90621
 714.522.3551
 714.522.3565

Welcome **Anthony Counterman** |  [Logout](#)

SEARCH NOTES

[Home](#)
[Search Notes](#)
[Customer Notes](#)
[Notes](#)



260 - BUD'S TIRE PROS

1 Note(s)



Clear Modified Flag(s)

Add +



Created For: [BUD'S TIRE PROS \(RB\)](#) (260) Created By: Rob Salesman Created On: 7/25/2022 12:05:51 PM Addition1: test Response Adi34: FSFSD add5: CDVFGGF 123456789: 3243454@\$% !@#\$\$%&^*((): tt5

Note originally entered by Rob Salesman.

1

Page size: 10

1 Items in 1 pages

©2024, All Rights Reserved
 [Privacy Policy](#) • [Terms and Conditions](#) • Powered by Autologue

The actual note, the creation/last modification dates, and the user names of who created/modified the note entry. A note can be emailed by clicking on the envelope (✉) icon. The existing note entry can be modified by clicking on the edit (✎) icon. Clicking on the trash can (🗑) icon will delete the note entry.

Links

- From the user's home screen, to access a listing of opportunities that have been setup by management, click on the [Links](#) menu tile and the following screen will be displayed:

LINKS

Home Links

Monroe ride and drive event

Moog problem solver bulletins library

Raybestos Brakes

Fram Website

List of Links that have been setup.

©2025, All Rights Reserved Privacy Policy • Terms and Conditions • Powered by Autologue

The links can be reminders of important information or can be links to web pages. This information is setup within the *Manage Links* section of the *Setup ePartConnection* webpage.