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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.

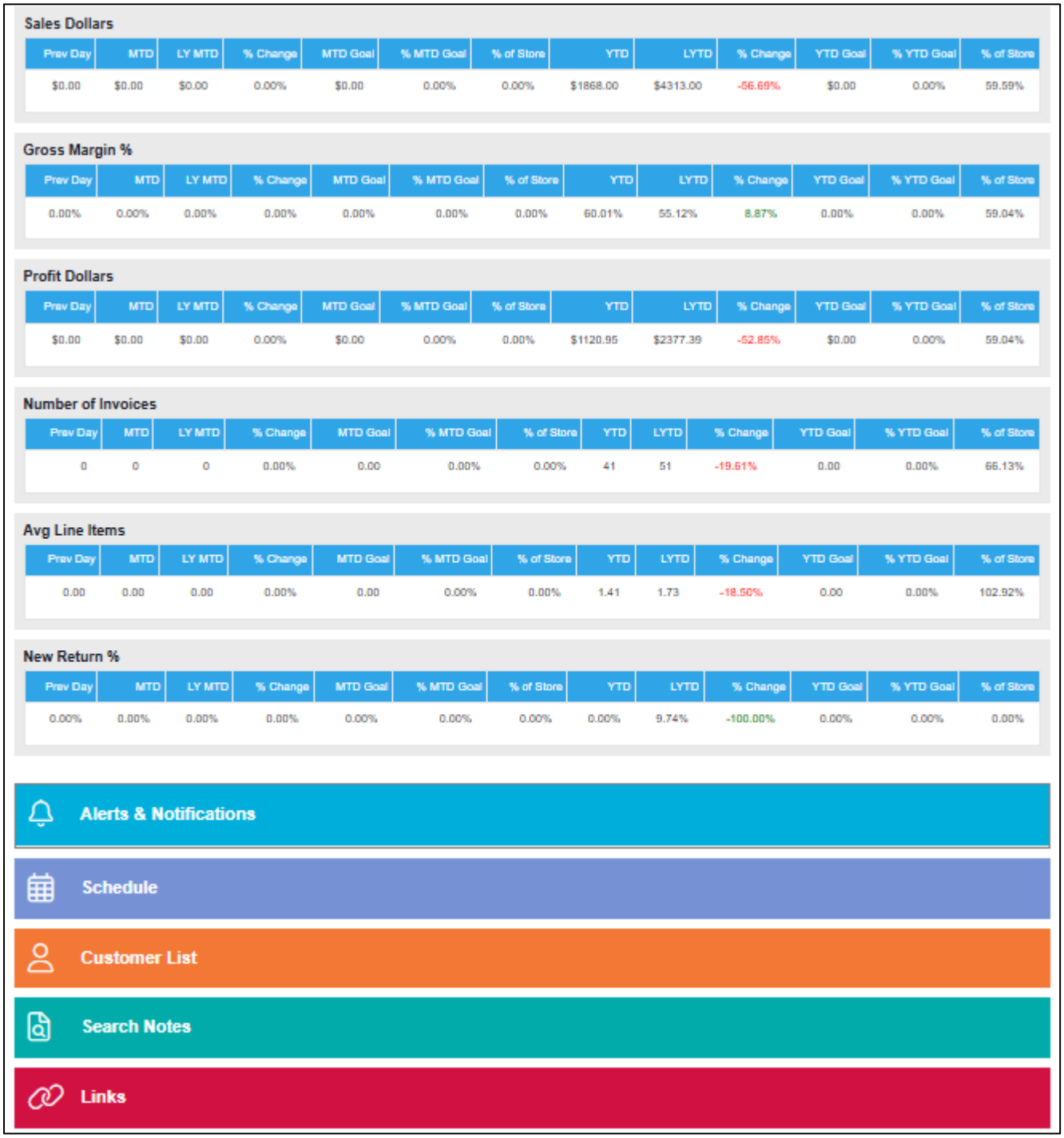
Counter User Login Screen

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%

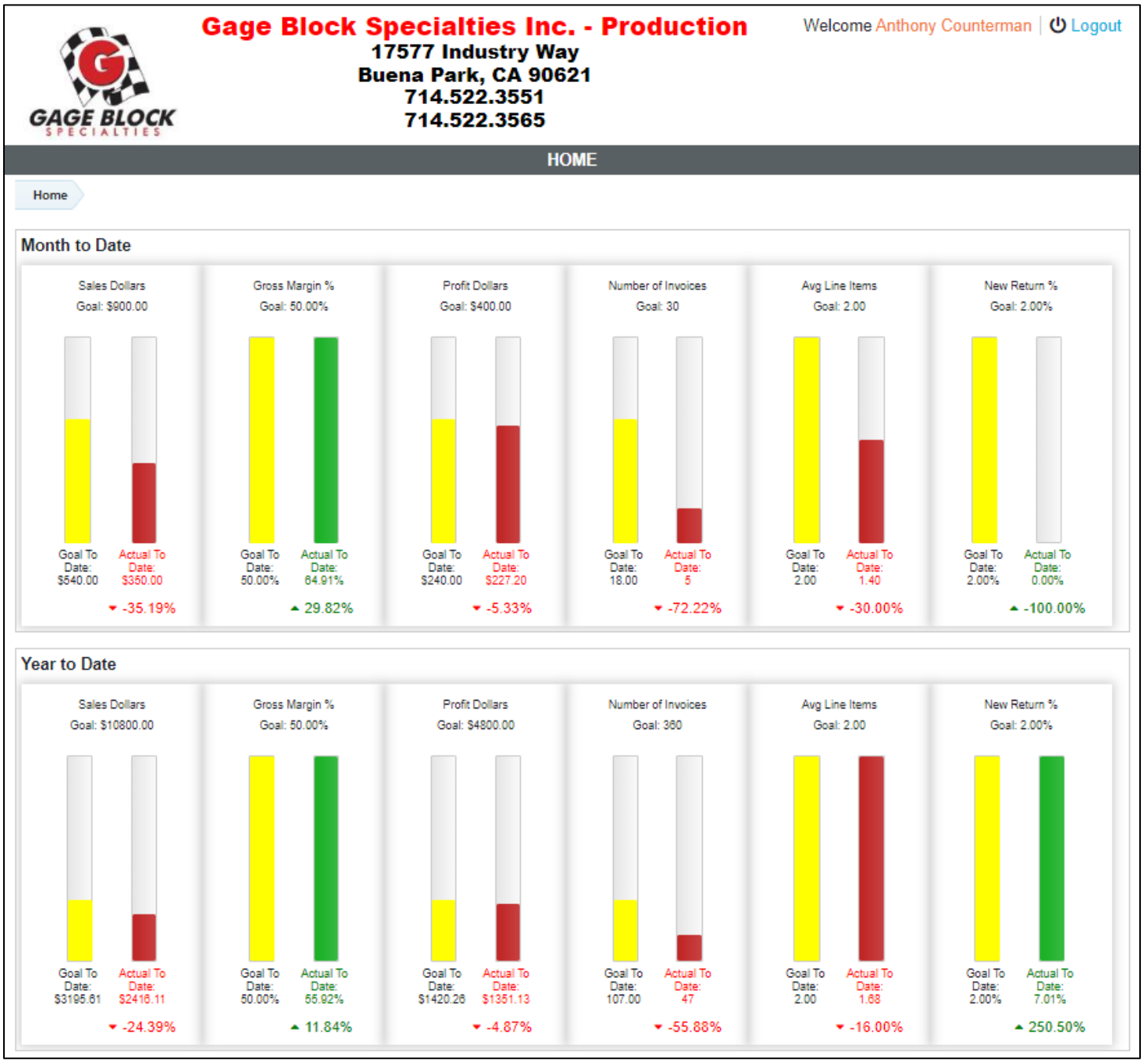
New Return %

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%

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.

☞ **<u>Note:</u> 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.

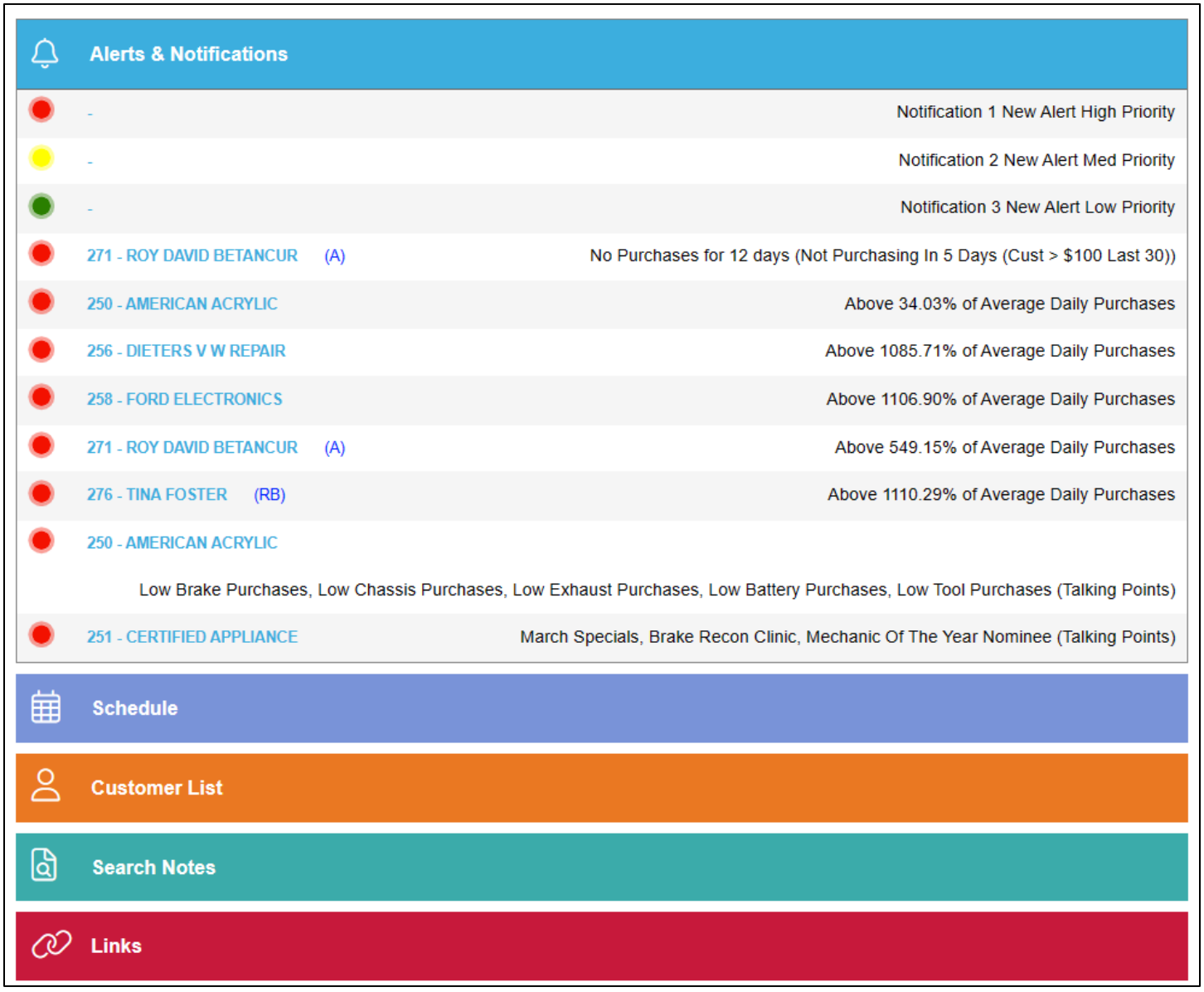
Award Table

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. Note: 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)**

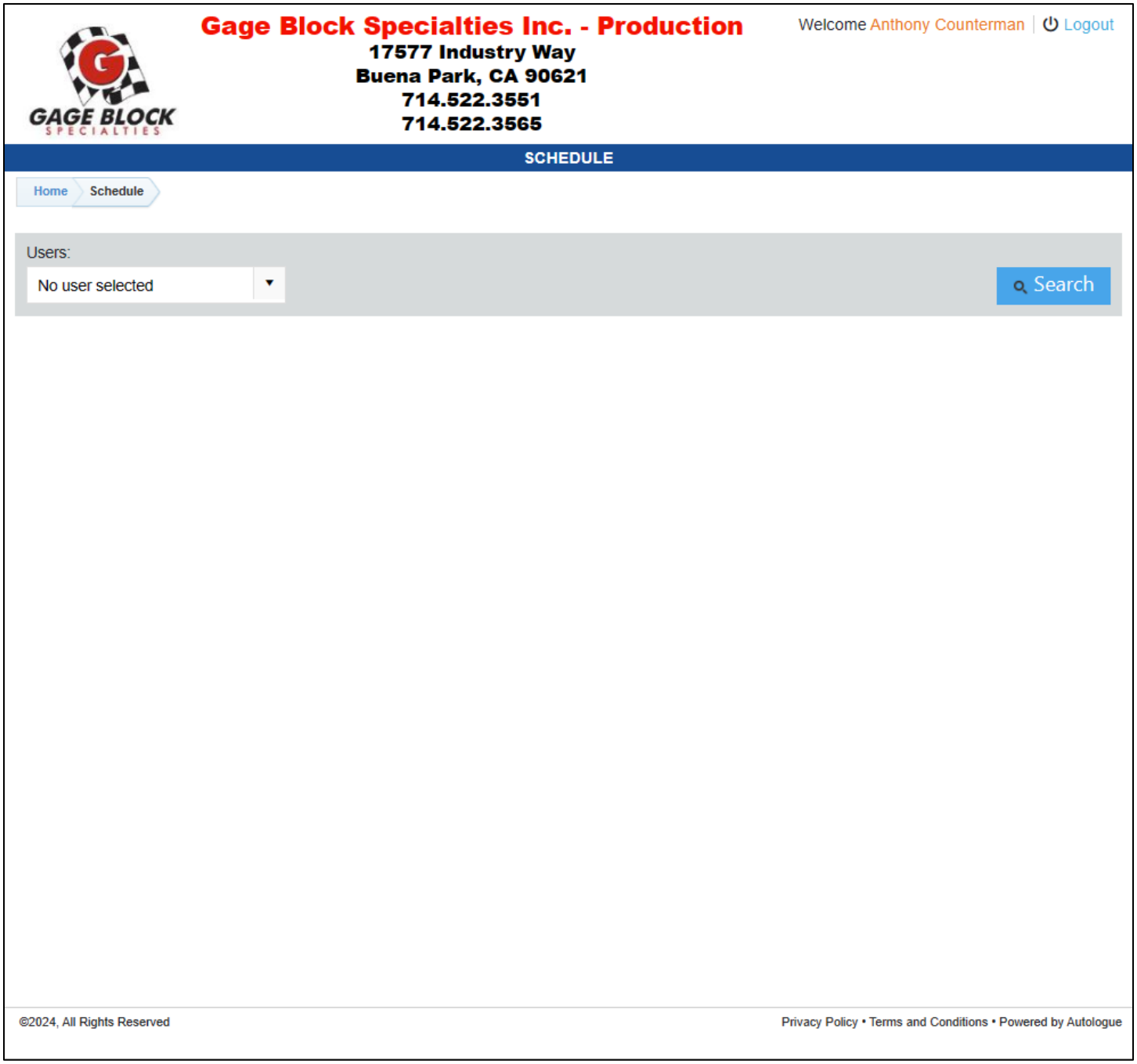
From the user's home screen, if any alerts or notification has been setup and/or met by the administrator, they will be displayed below the `Alerts & Notifications` heading section when the tile is clicked on as shown:



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.



- By default, no user is selected. A sales user must be selected to view their schedule.

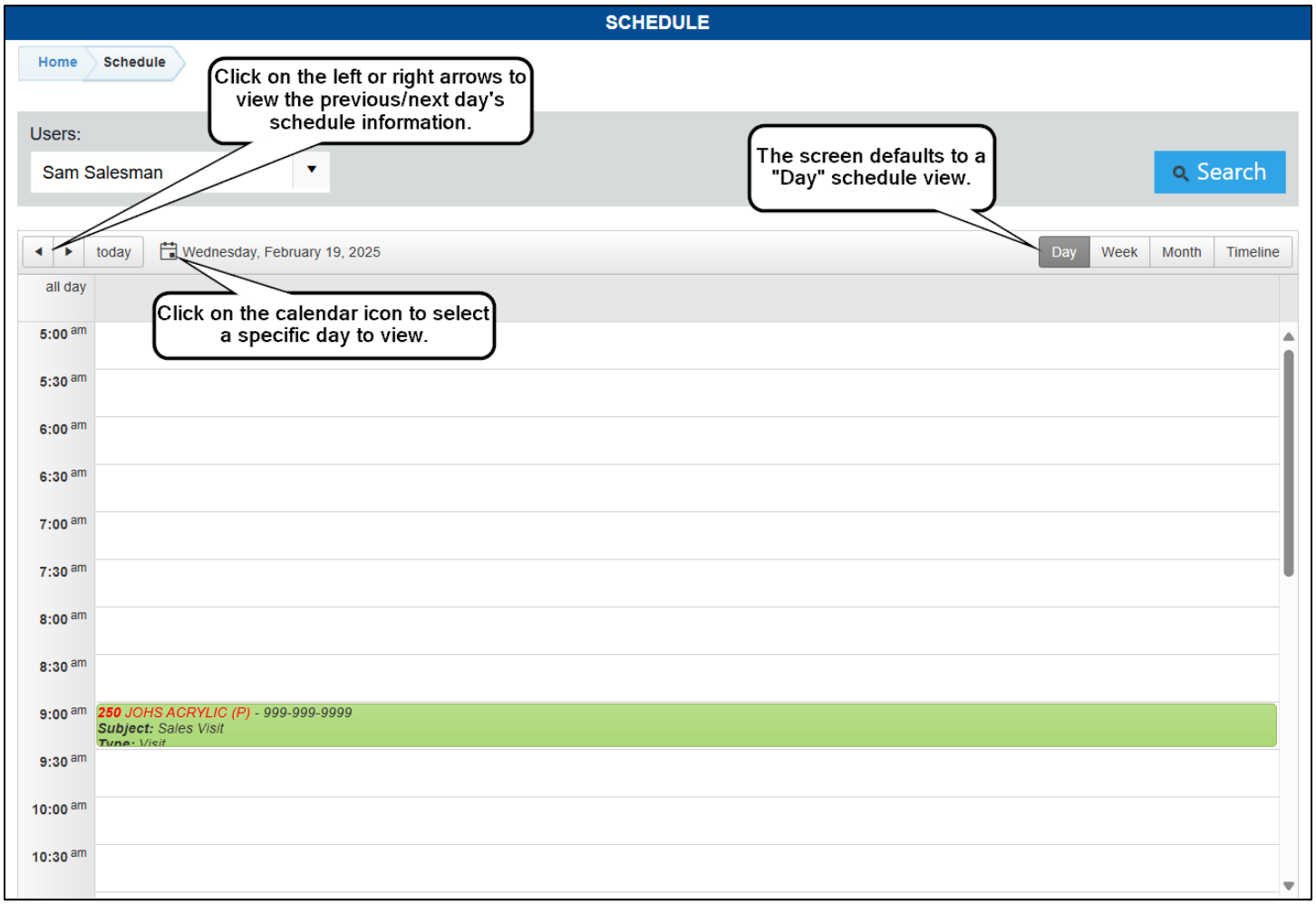
☞ ****NOTE** The Counter user can only <u>view</u> Sales users' schedules, they may not add or change appointments.**

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

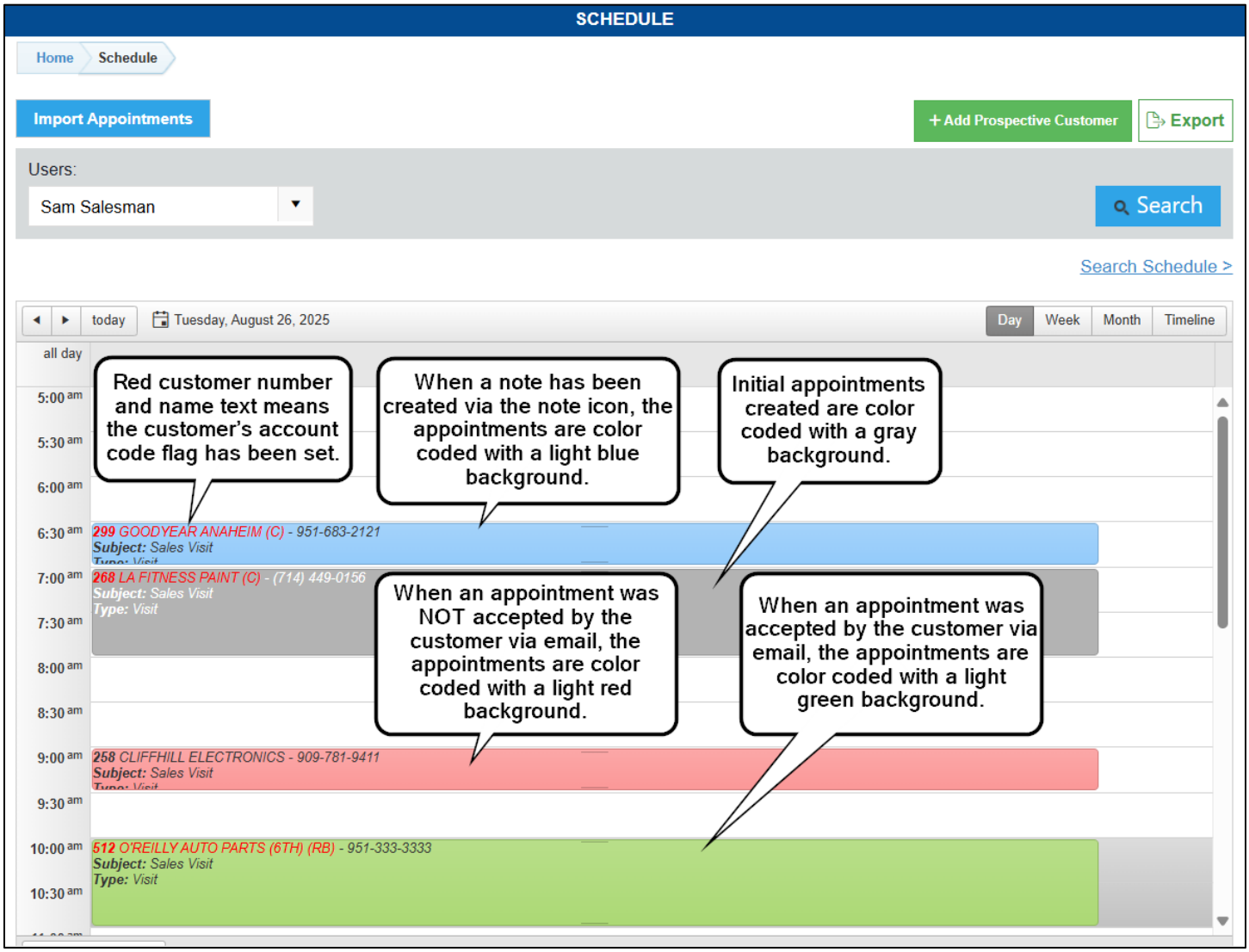
By default, the screen will display a daily schedule view as shown:



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



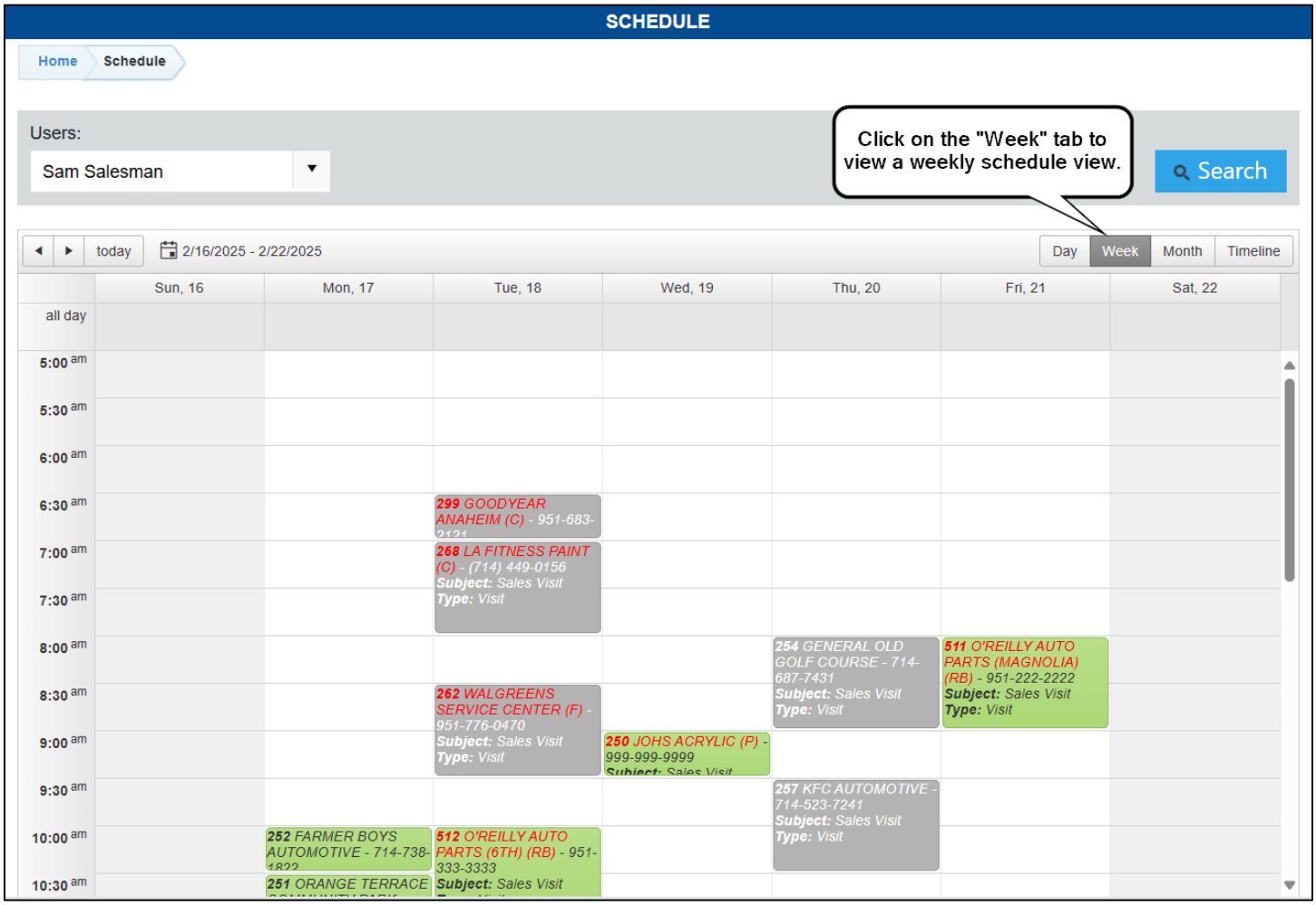
Background Color	Description
Light Gray	When appointments are initially created, it will have a light gray background.
Light Blue	When a note has been created via the note icon displayed within the appointment pop-up window, the appointments will have a light blue background.
Light Red	When an appointment was NOT accepted by the customer via email, the appointments are color coded with a light red background. This requires the *Appointment Email Functionality* 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 *Appointment Email Functionality* 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:



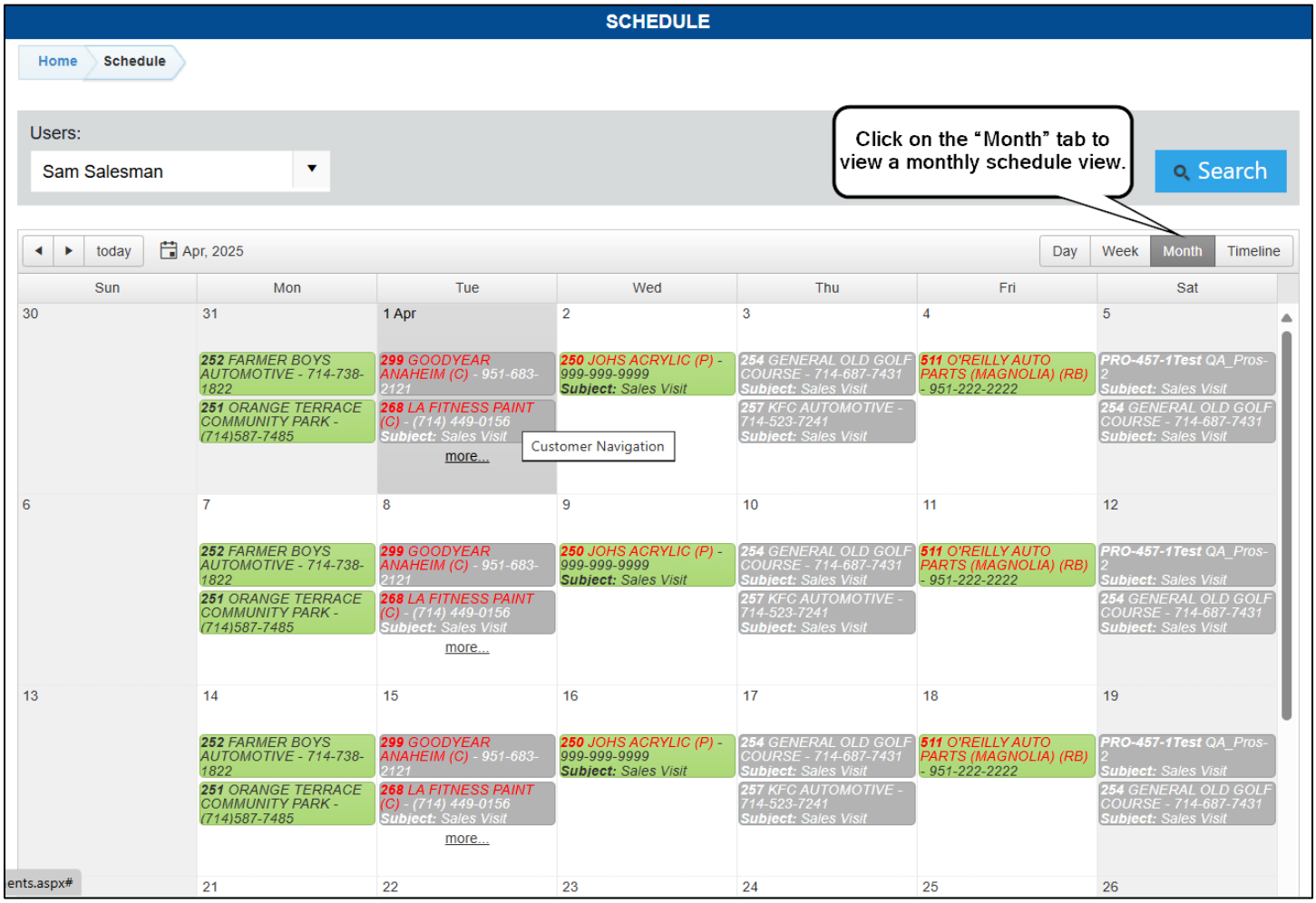
The weekly schedule view shows all appointments only for the current week.

- 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:



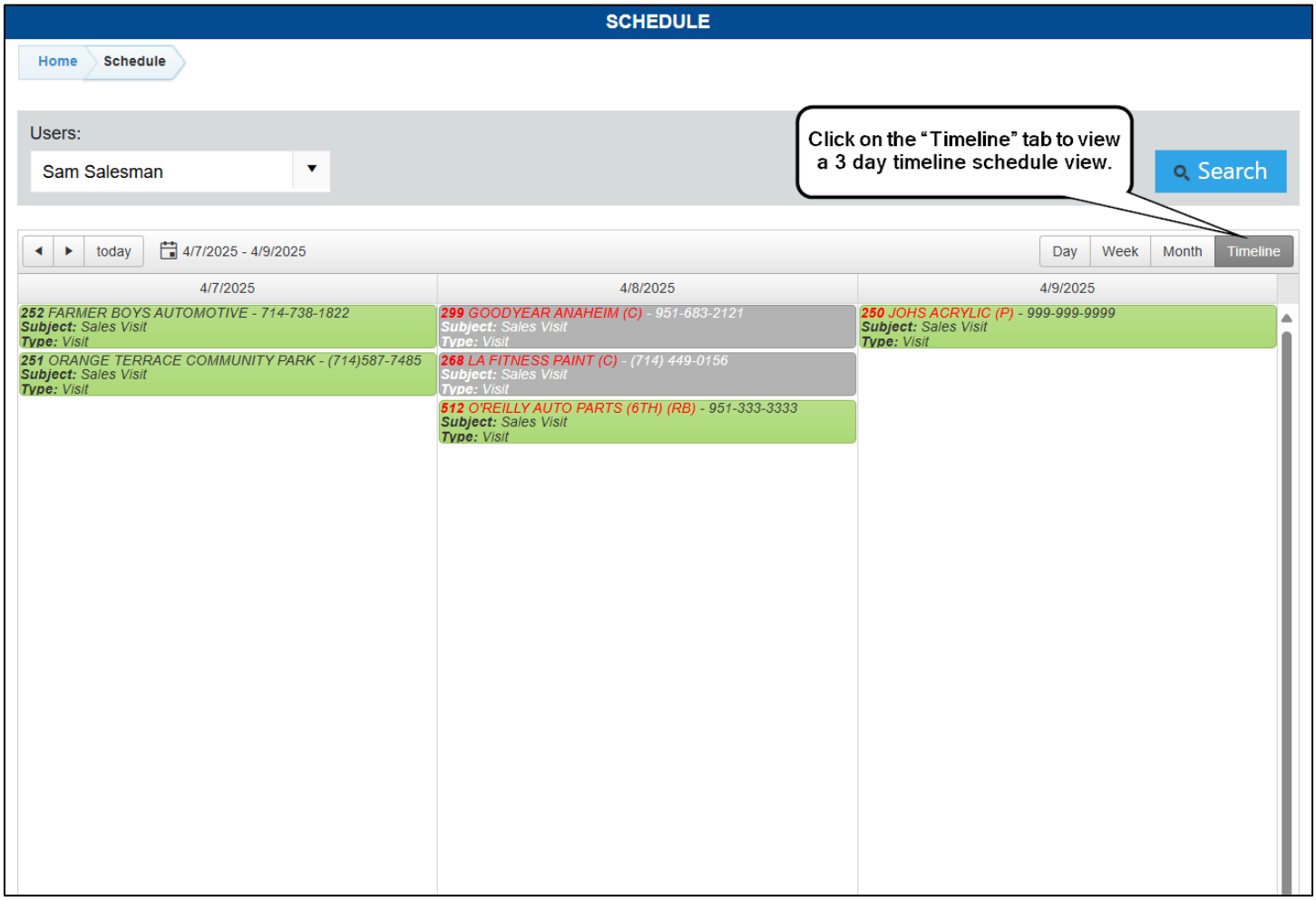
The monthly schedule view shows all appointments only for the current month.

- 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:



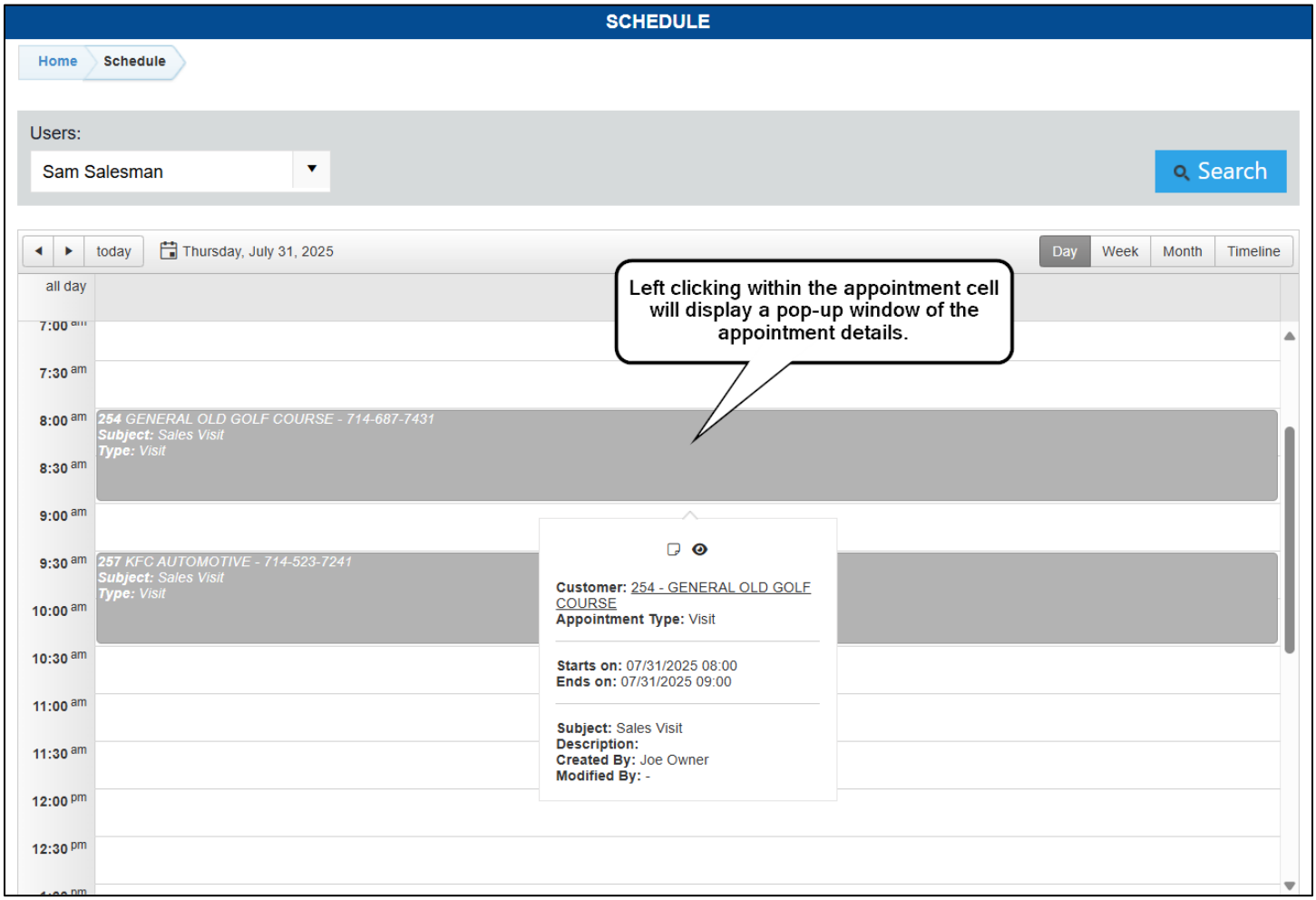
The timeline schedule view shows all appointments only for a 3-day period.

- 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:

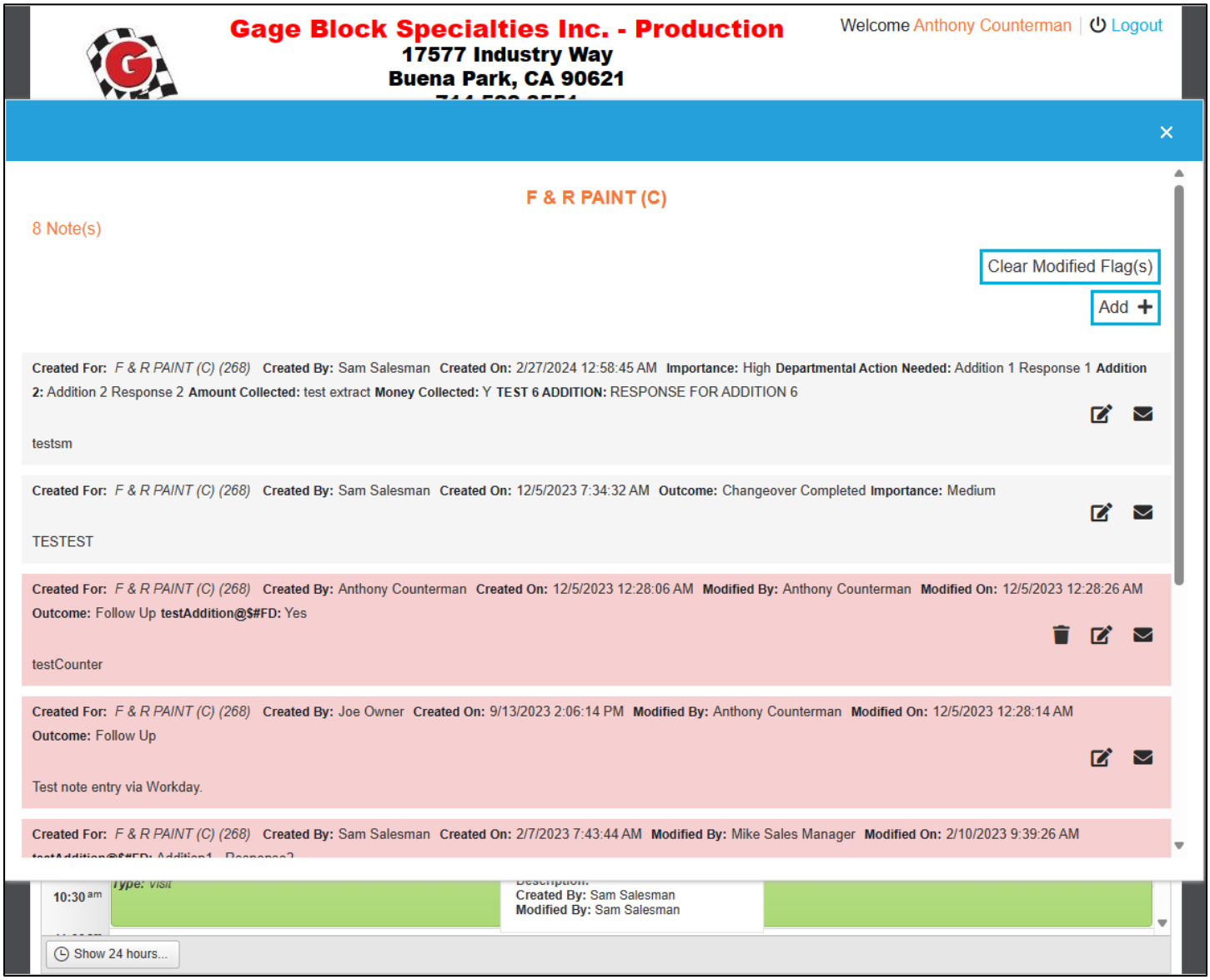


- To remove the appointment details pop-up window, click anywhere else on the screen.

Entering A Customer Note From An Appointment

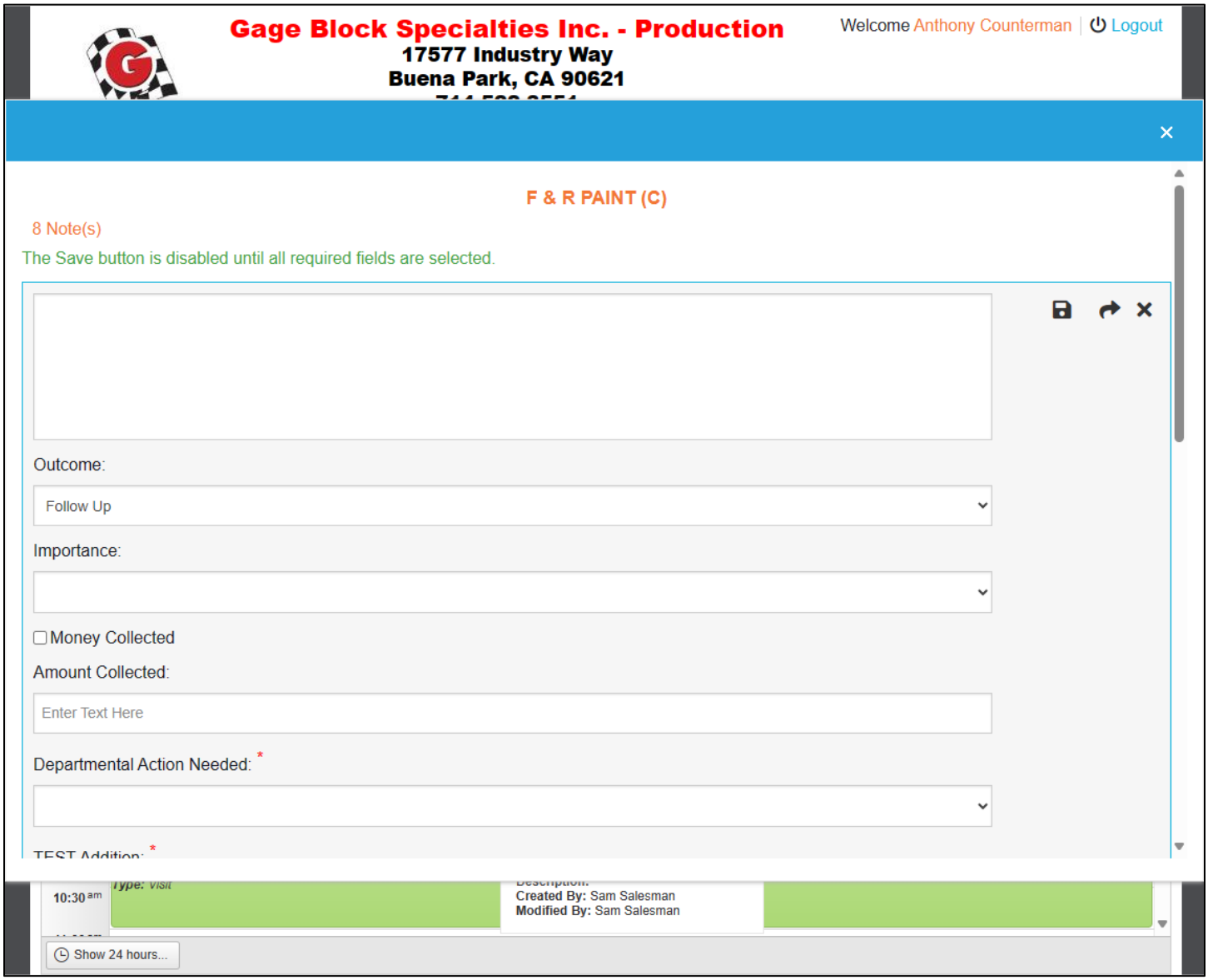
- With the schedule screen displaying appointments in the day view, left click within an appointment cell to view the appointment details (anywhere except the customer's name). You can enter a customer note by left clicking on the customer notes icon (🗋).

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:



- 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.**

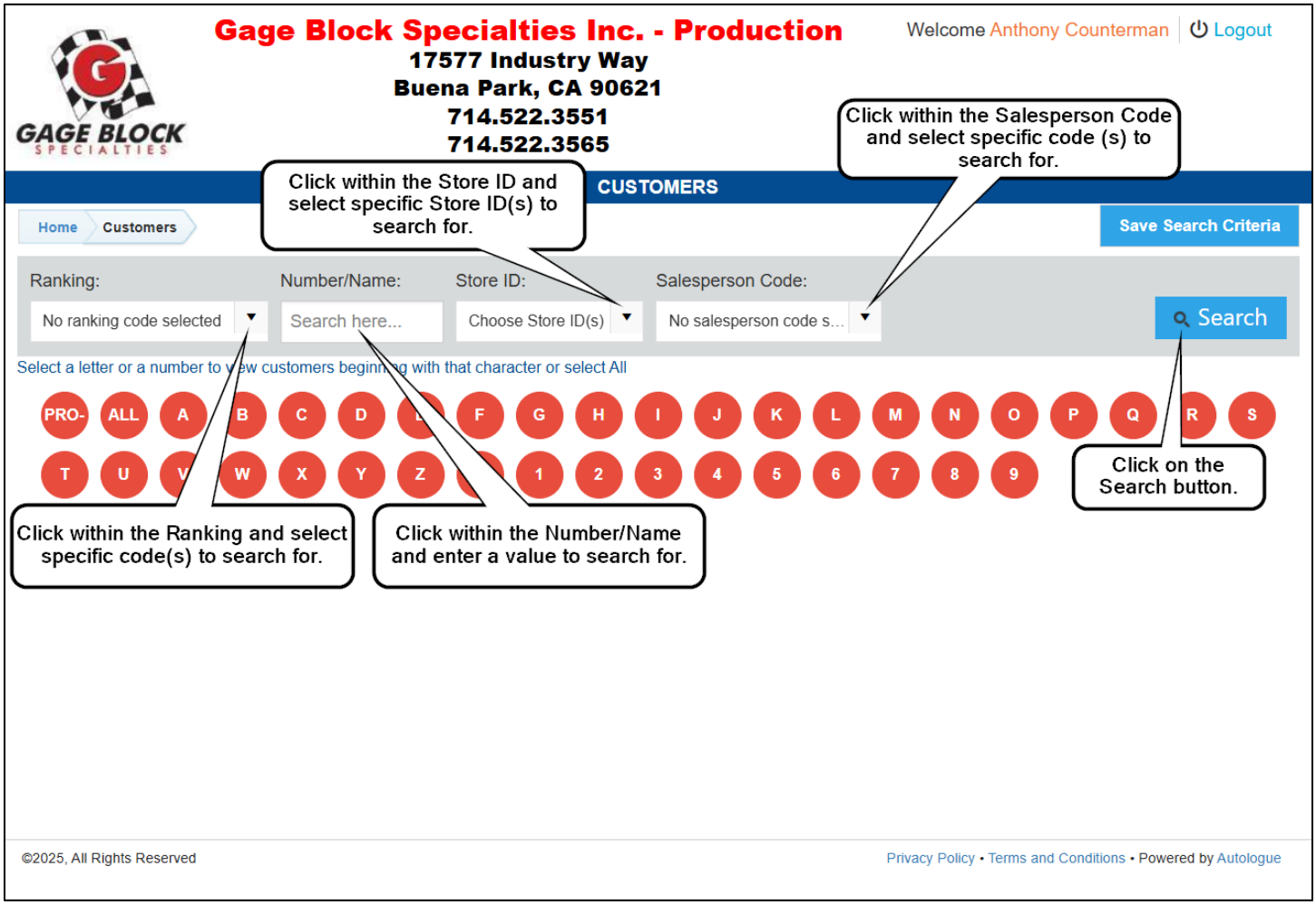
- Once the note has been entered and the optional fields have been selected, click on the Save ( ) icon to save the entered note. You also have the option to both save the entered note and have it emailed by clicking on the Save and Email (➦) icon.

  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:

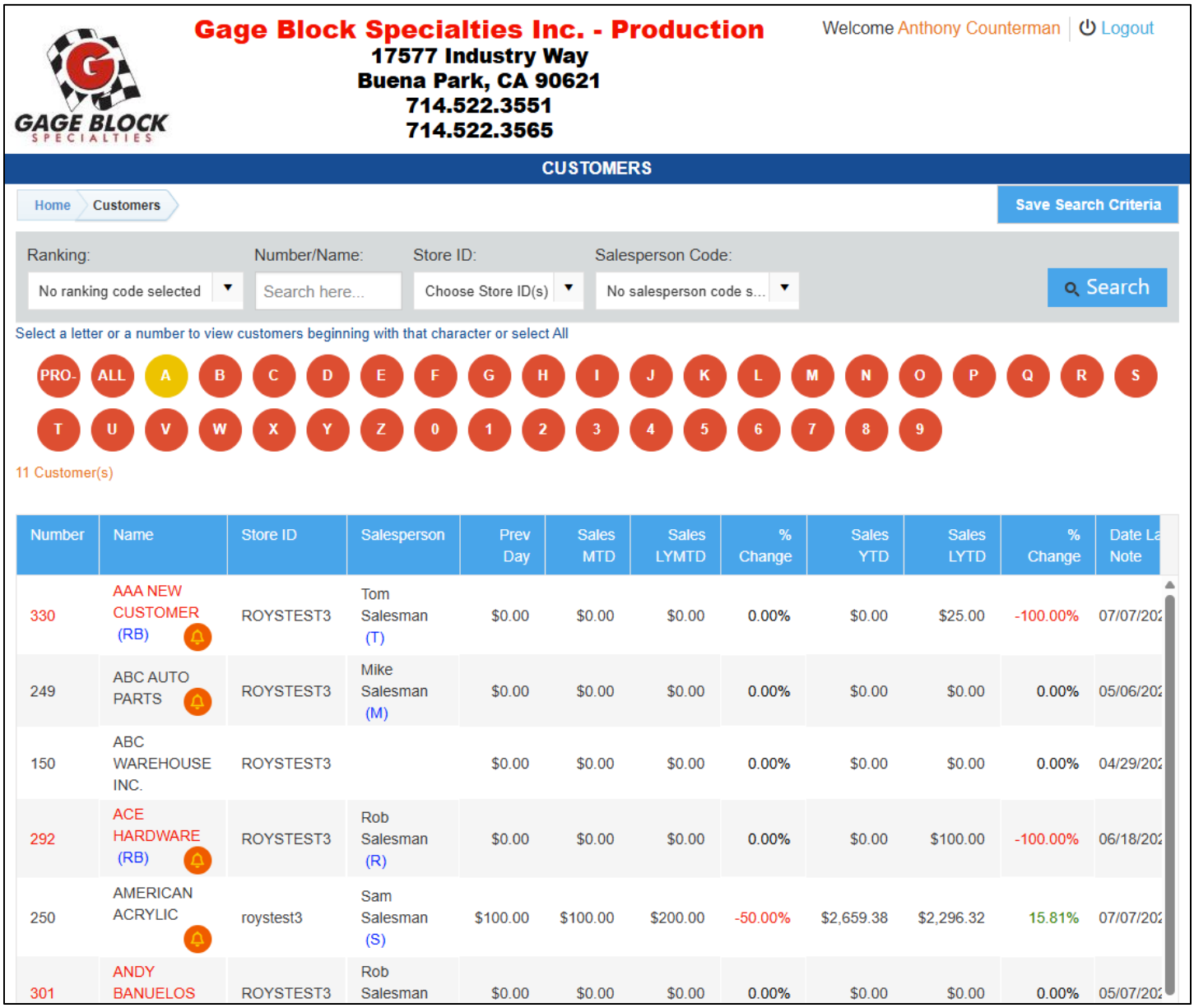


By default, no customers are displayed on the screen.

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.



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.

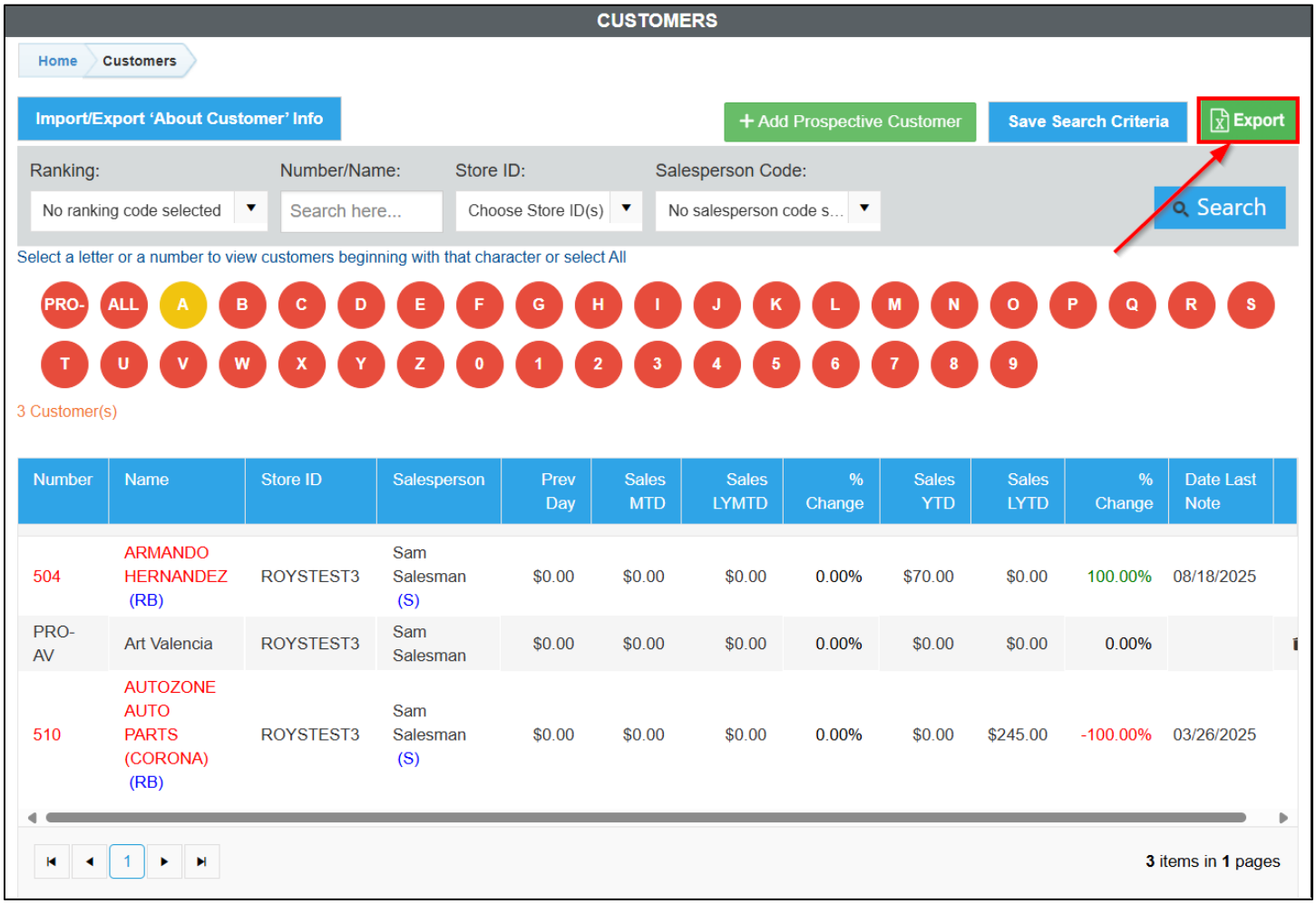
The current search criteria will automatically be displayed when clicking on the Customers tile from the home page. Logging out will not clear the saved search.

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*).



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:

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).

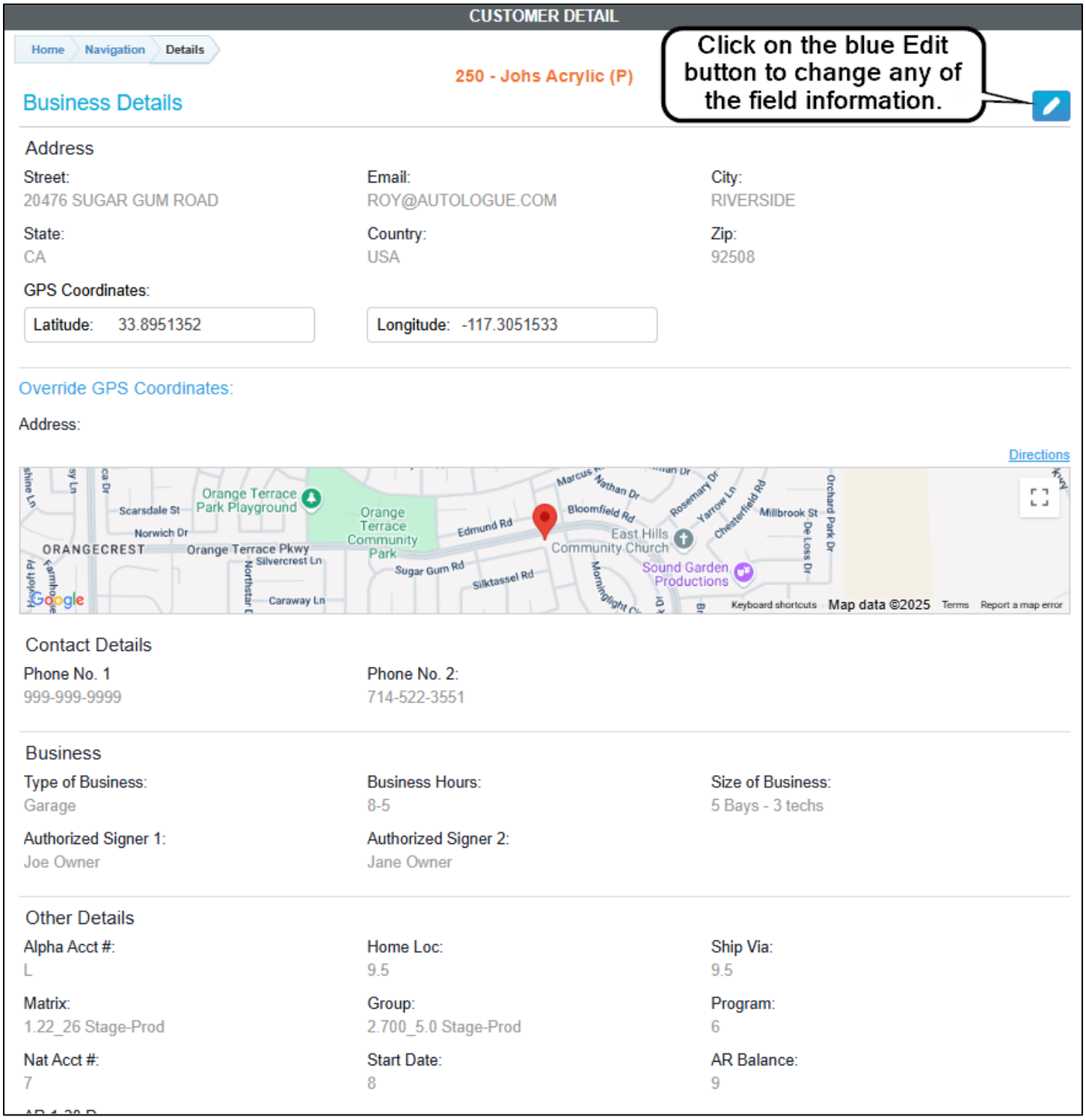
Displayed below the colored tiles, are specific sections that display alerts and upcoming appointments for the selected customer.

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

• About Customers: View/Add additional business & personal information.	• ePartConnection: Automatically login to ePartConnection as the customer. This tile is only visible if your company subscribes to ePartConnection.
• eOffice: Automatically login to eOffice as the customer. This tile is only visible if your company subscribes to eOffice.	• Business Intelligence: View a sales dashboard.
• Notes: View/Add customer notes information.	• Tasks: View pending tasks for this customer.
• Directions: Displays a map with directions to the selected customer.	• Alerts: Displays specific alerts pertaining to the selected customer.
• 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:



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.

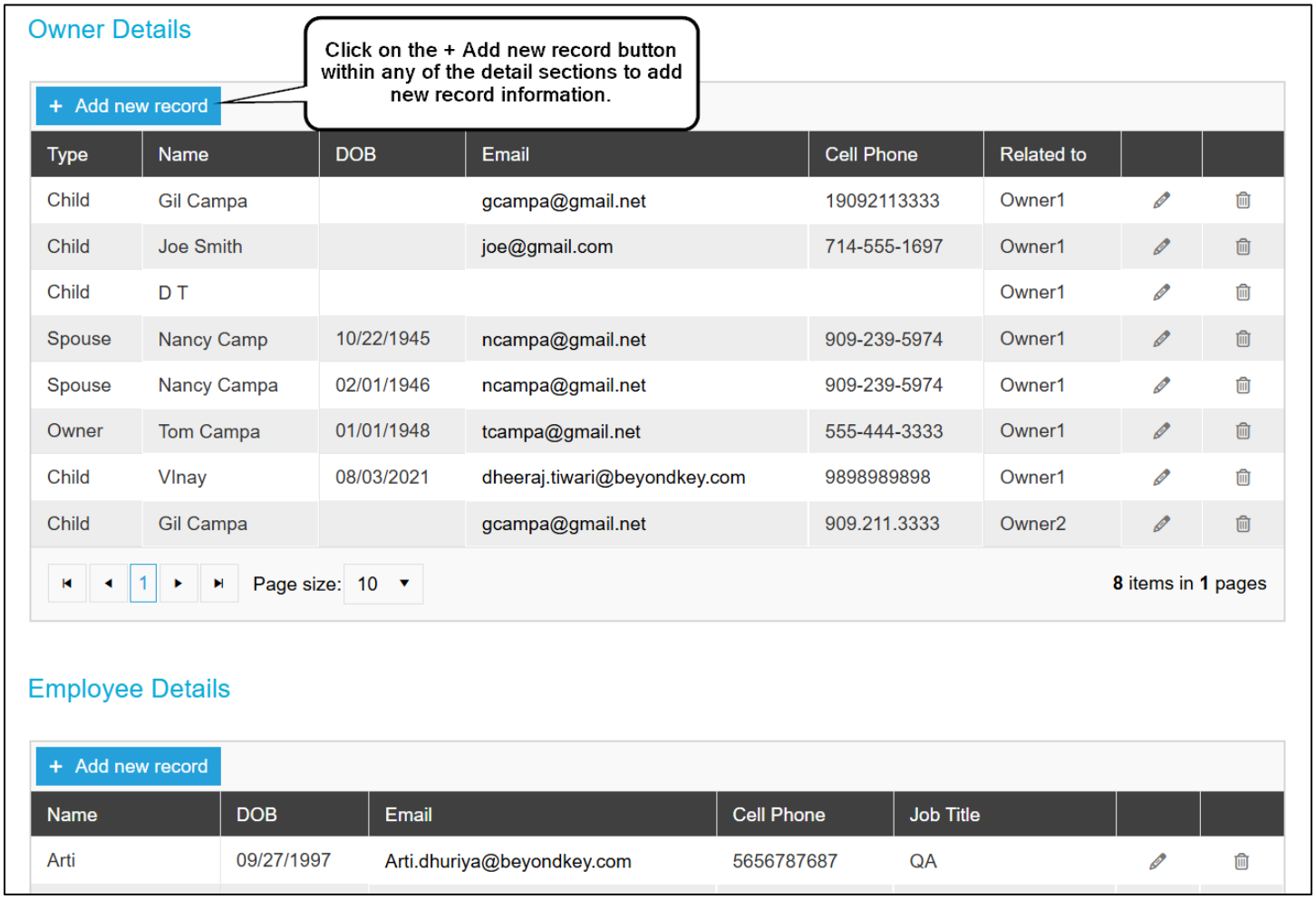
The `GPS Coordinates:` heading will display either `GPS Coordinates`, `Imported GPS Coordinates`, or `Overridden GPS Coordinates` depending on how the latitude/longitude coordinates were created. Shown below are how each is determined:

GPS Coordinates:	Uses the street address information that is entered within the *ePart Setup->Customer Options* screen and plots to valid latitude/longitude values.
GPS Coordinates:	Uses the street address information that is entered within the *ePart Setup->Customer Options* 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 *ePart Setup->Customer Options* screen.
Overridden GPS Coordinates:	Uses the street address that is entered within the *Override GPS Coordinates->Address* 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:



- 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

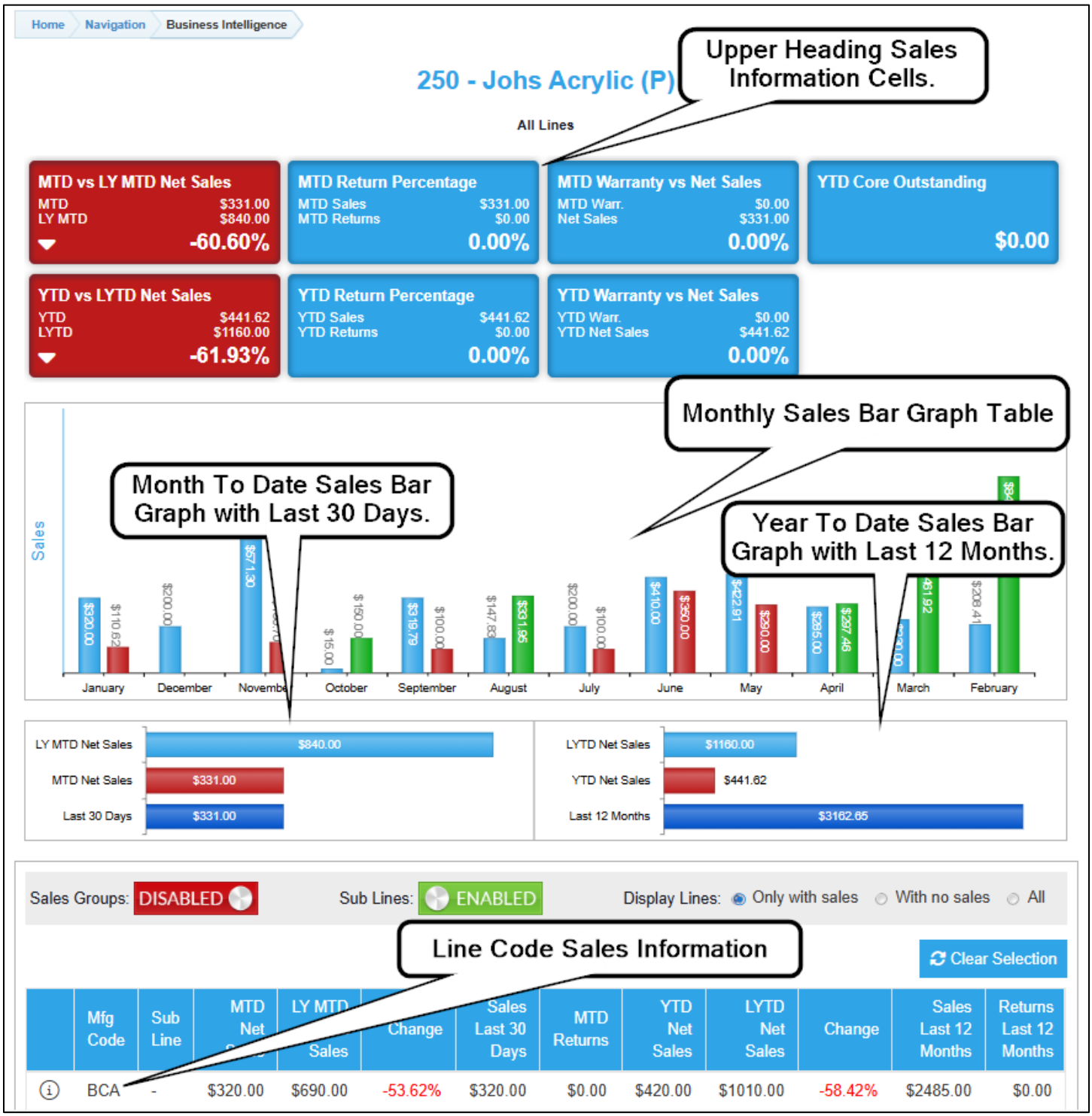
- From the *CUSTOMER NAVIGATION* screen, click on the `ePartConnection` colored menu tile and the ePart will be opened and you will be automatically logged into the customer's account within ePartConnection. Note: This tile is only visible if your company subscribes to ePartConnection.

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

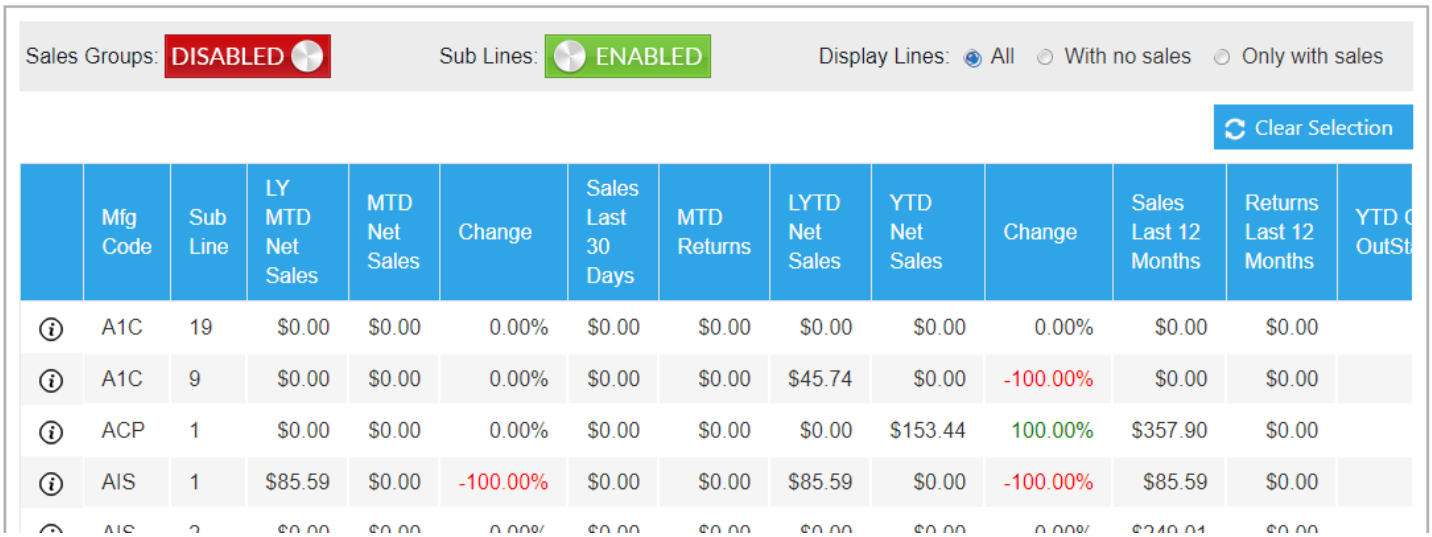
The third section of the screen, just below the monthly sales bar graph section, displays the month and year to date sales dollars versus last month and current sales dollars to date.

☞ **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

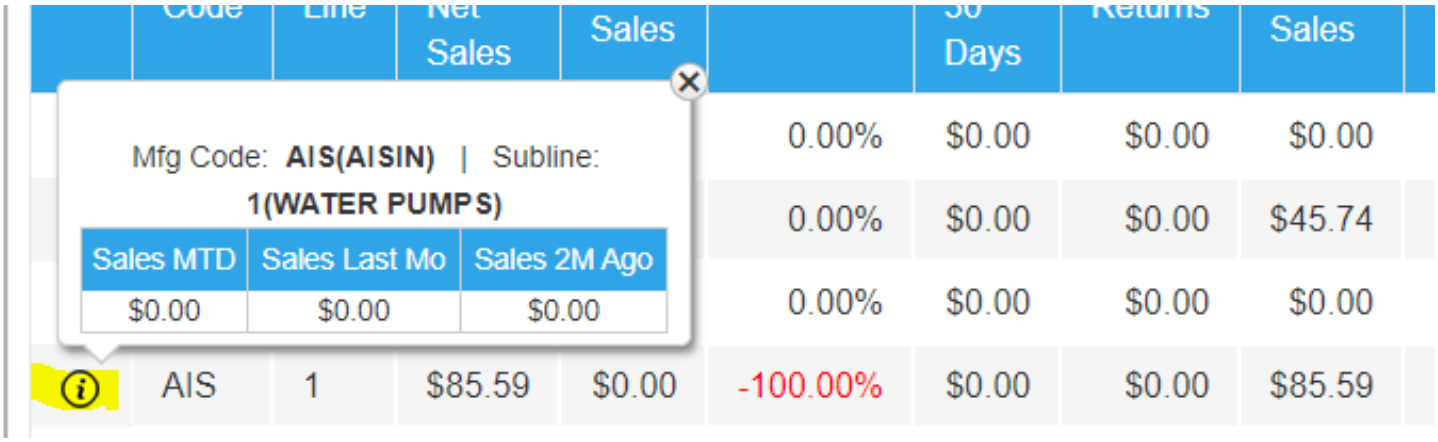
☞ **Note: Clicking on any line, sales group total line or line and sub line inside a sales group will change all graphs at the top to reflect only that choice. The header at the top of the page will reflect the graphs currently displaying. All columns are sortable by clicking the column header.**

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 (LYTD) 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.



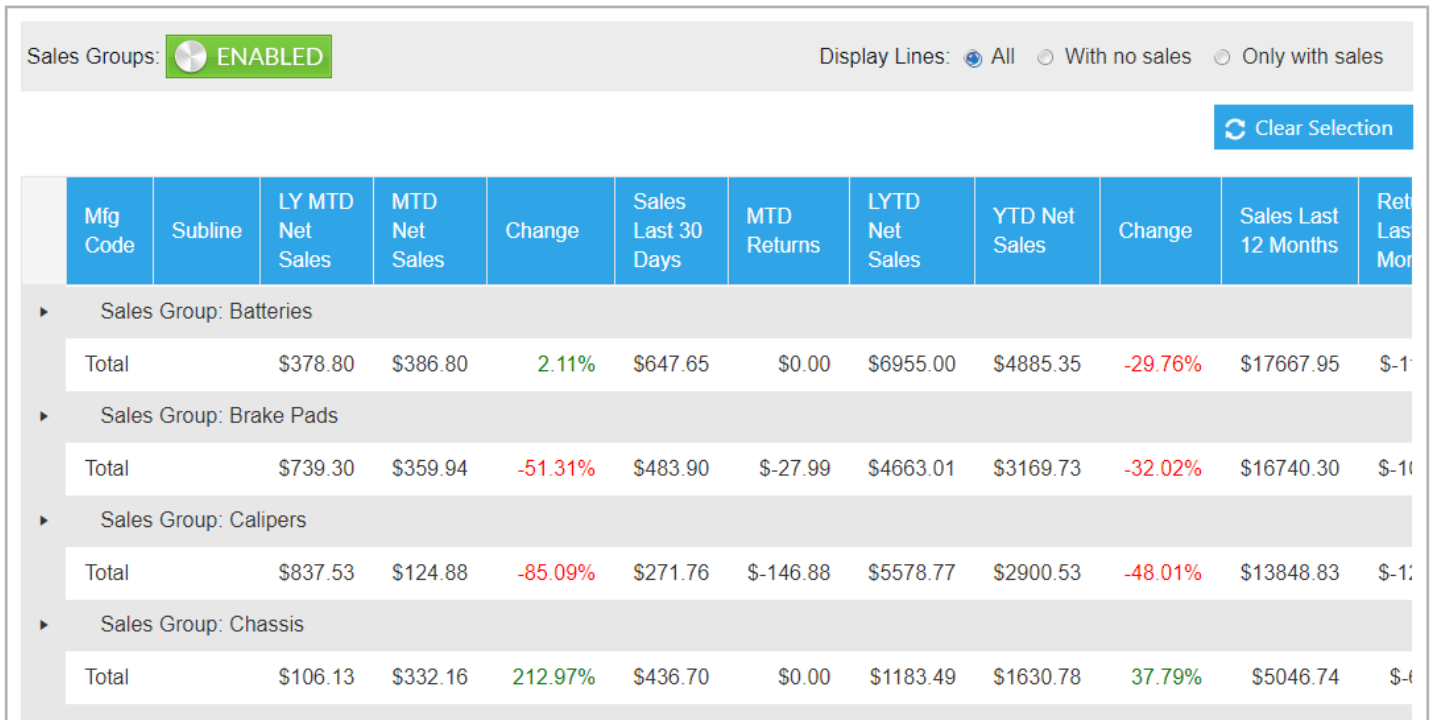
	Mfg Code	Sub Line	LY MTD Net Sales	MTD Net Sales	Change	Sales Last 30 Days	MTD Returns	LYTD Net Sales	YTD Net Sales	Change	Sales Last 12 Months	Returns Last 12 Months	YTD OutSt
ⓘ	A1C	19	$0.00	$0.00	0.00%	$0.00	$0.00	$0.00	$0.00	0.00%	$0.00	$0.00	
ⓘ	A1C	9	$0.00	$0.00	0.00%	$0.00	$0.00	$45.74	$0.00	-100.00%	$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	

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



Sales Groups

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



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 Mor
▸ 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	$-(

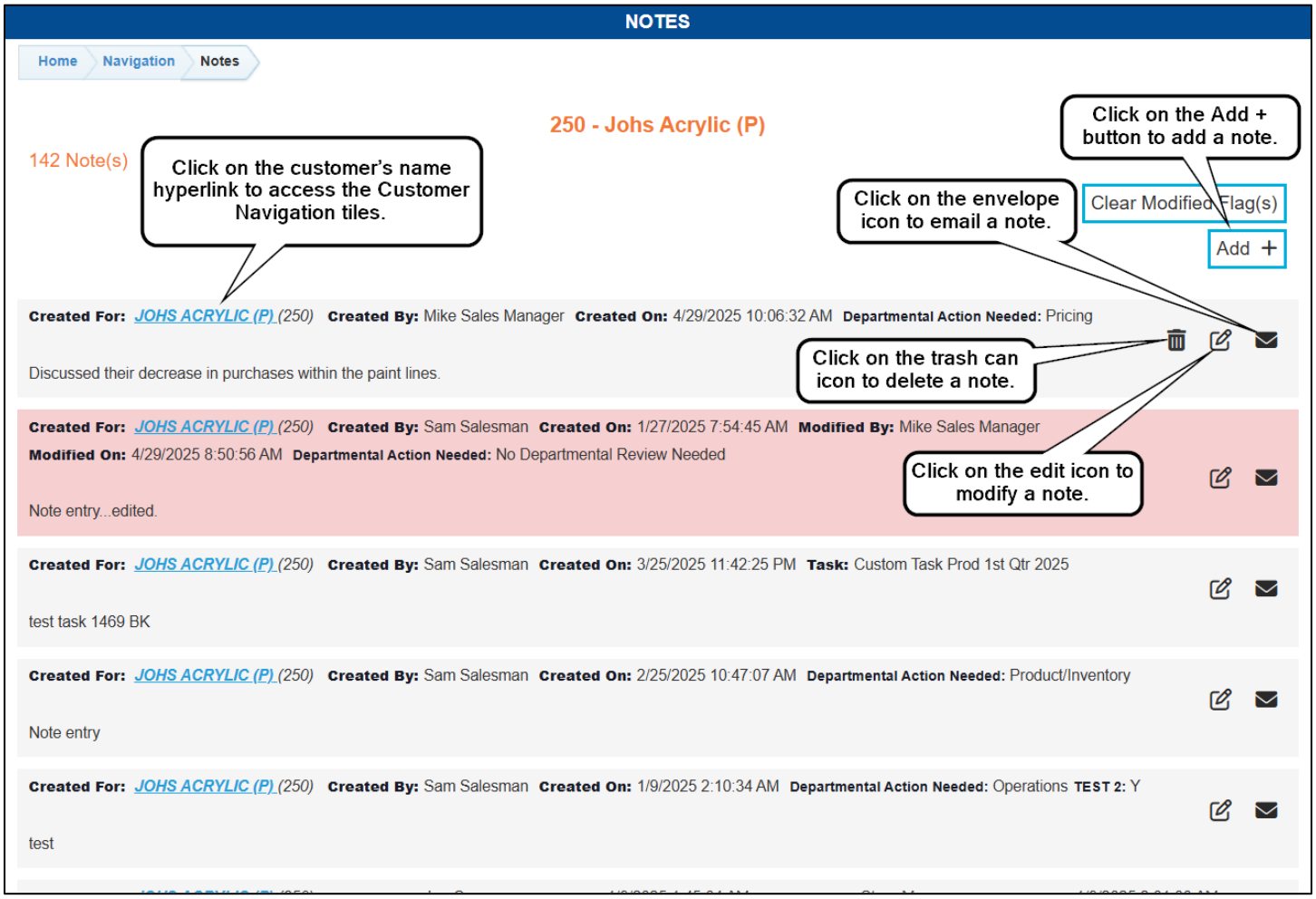
- The user has the option to see all lines (*All*), only lines with no sales (*With no sales*), or only lines with sales (*Only with sales*) by checking an option.
- Each group is expandable by clicking the arrow next to the name. This will display all Lines making up that group.

▾ 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	$-(
PWS	1	$76.38	$0.00	-100.00%	$67.98	$0.00	$646.94	$203.94	-68.48%	$1451.23	$-
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(

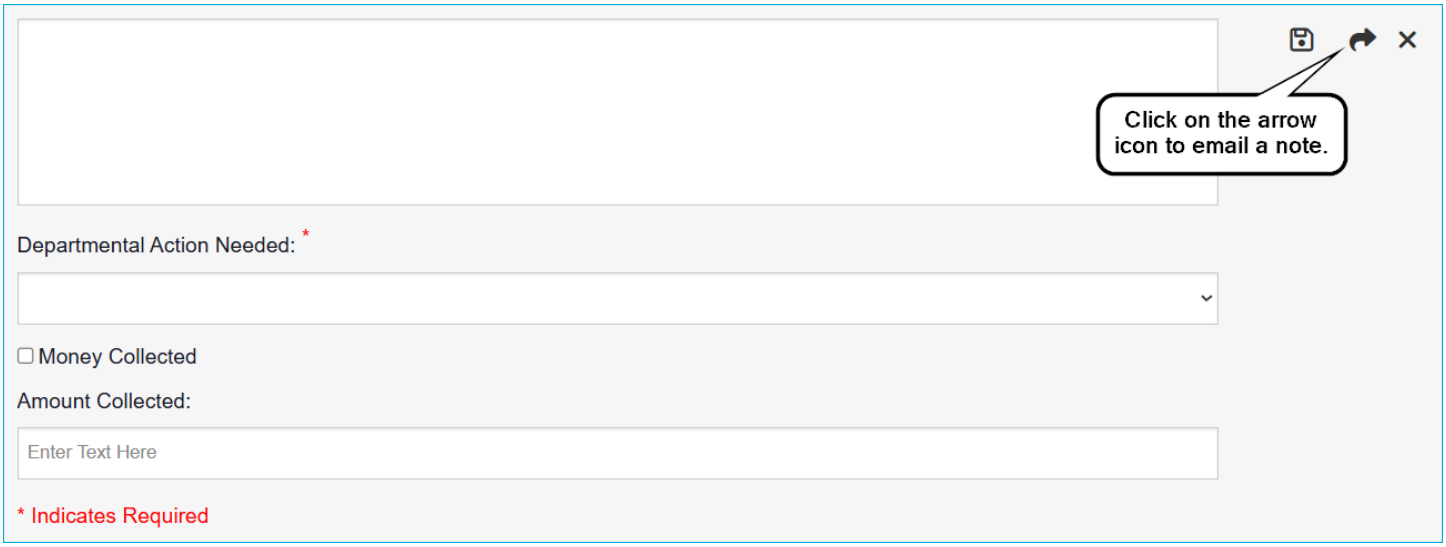
☞ **<u>Note:</u> Within the Customer's BI Graph, each user can now set the view they would like to see, as it "remembers" the filter settings for Sales Groups (enabled/disabled), Sub Lines (enabled/disabled), and Display Lines (All/With no sales/Only with sales) to be displayed as set in subsequent logins.**

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:



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.



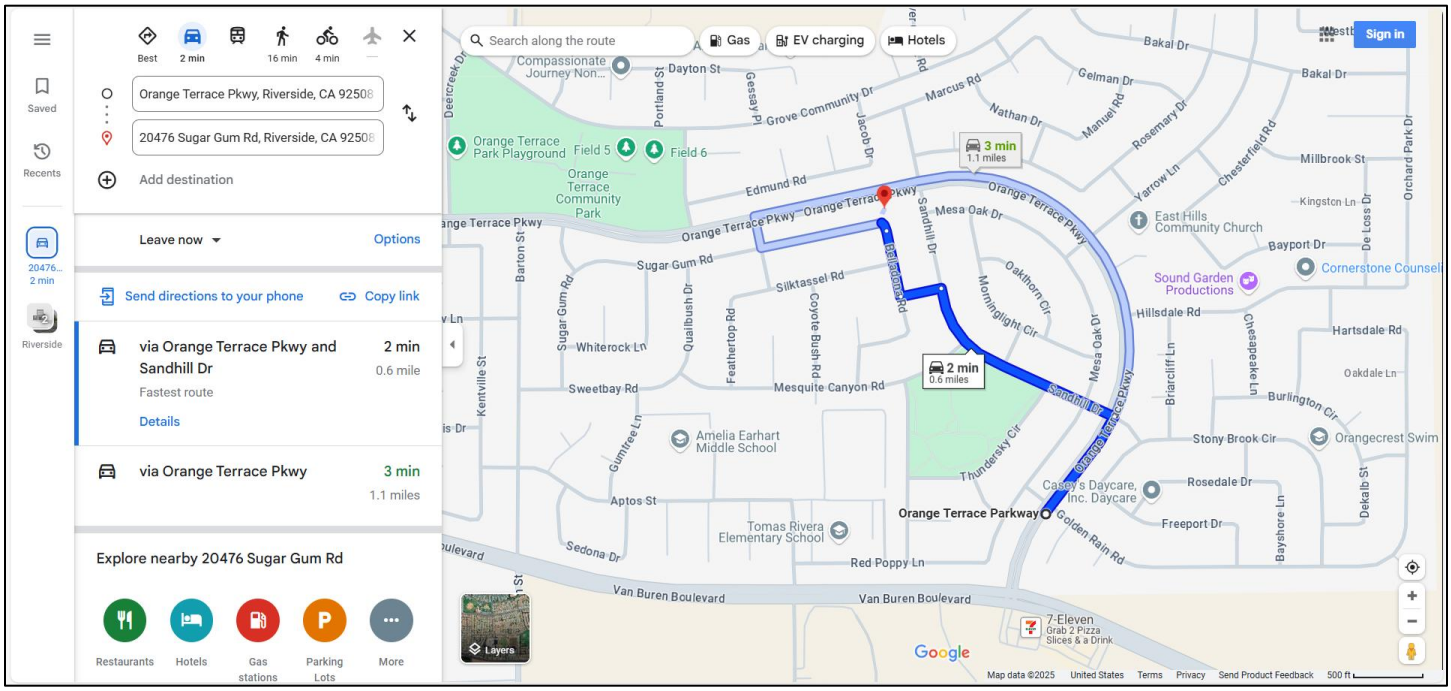
Tasks

- From the *CUSTOMER NAVIGATION* screen, click on the `Tasks` tile and the screen will display any pending tasks for the customer as shown:

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*.

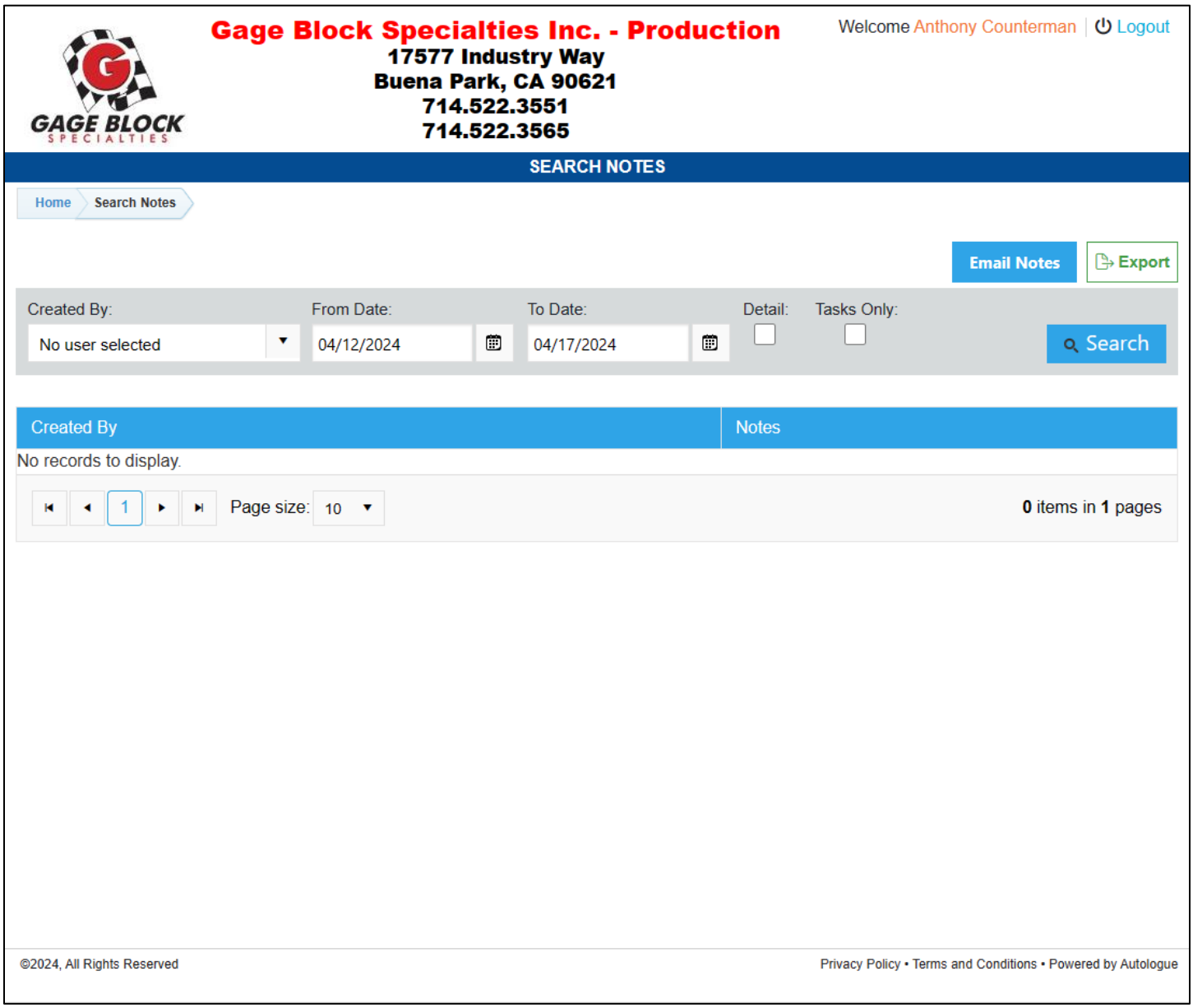
Directions

- 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:

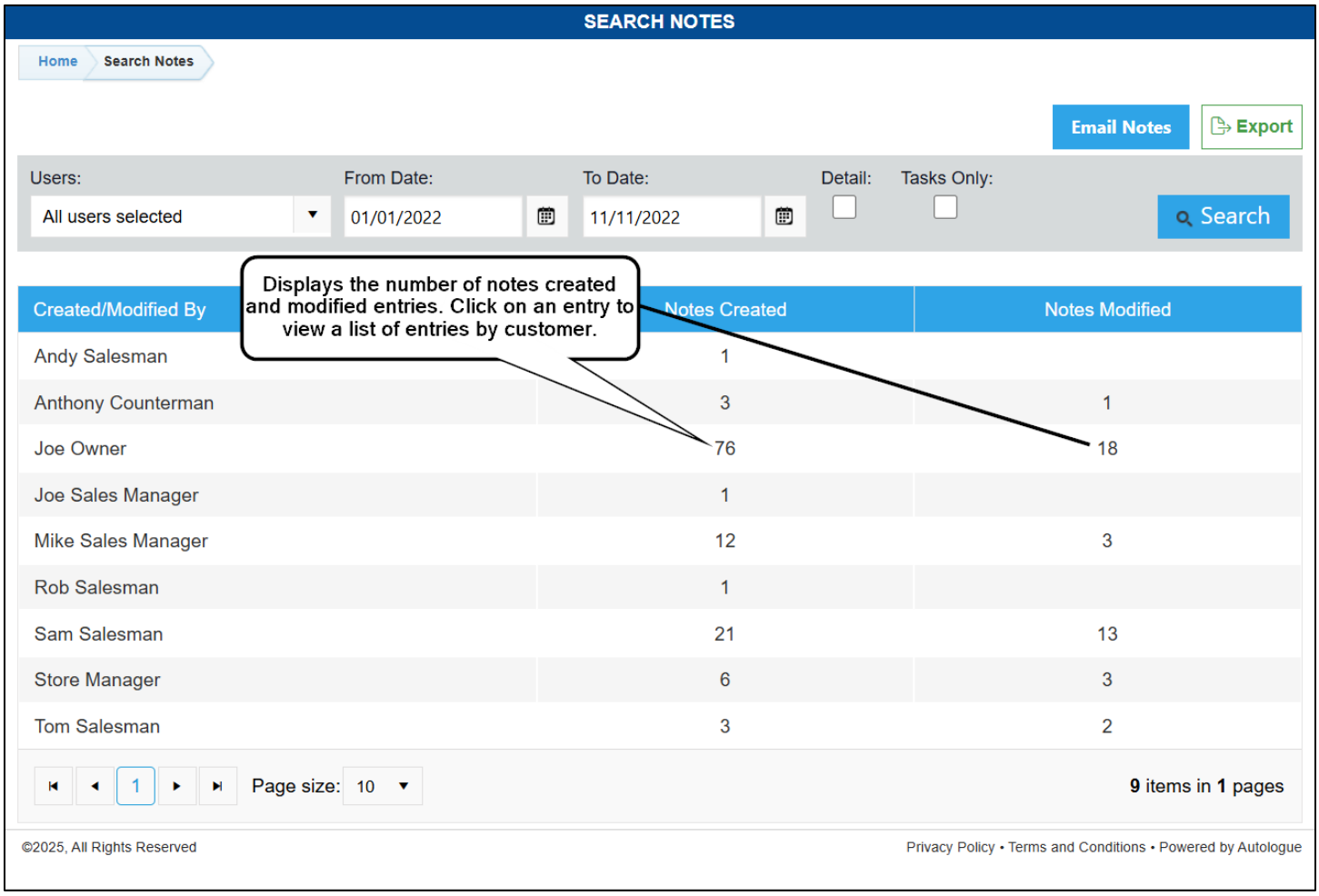


Search Notes

- 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:

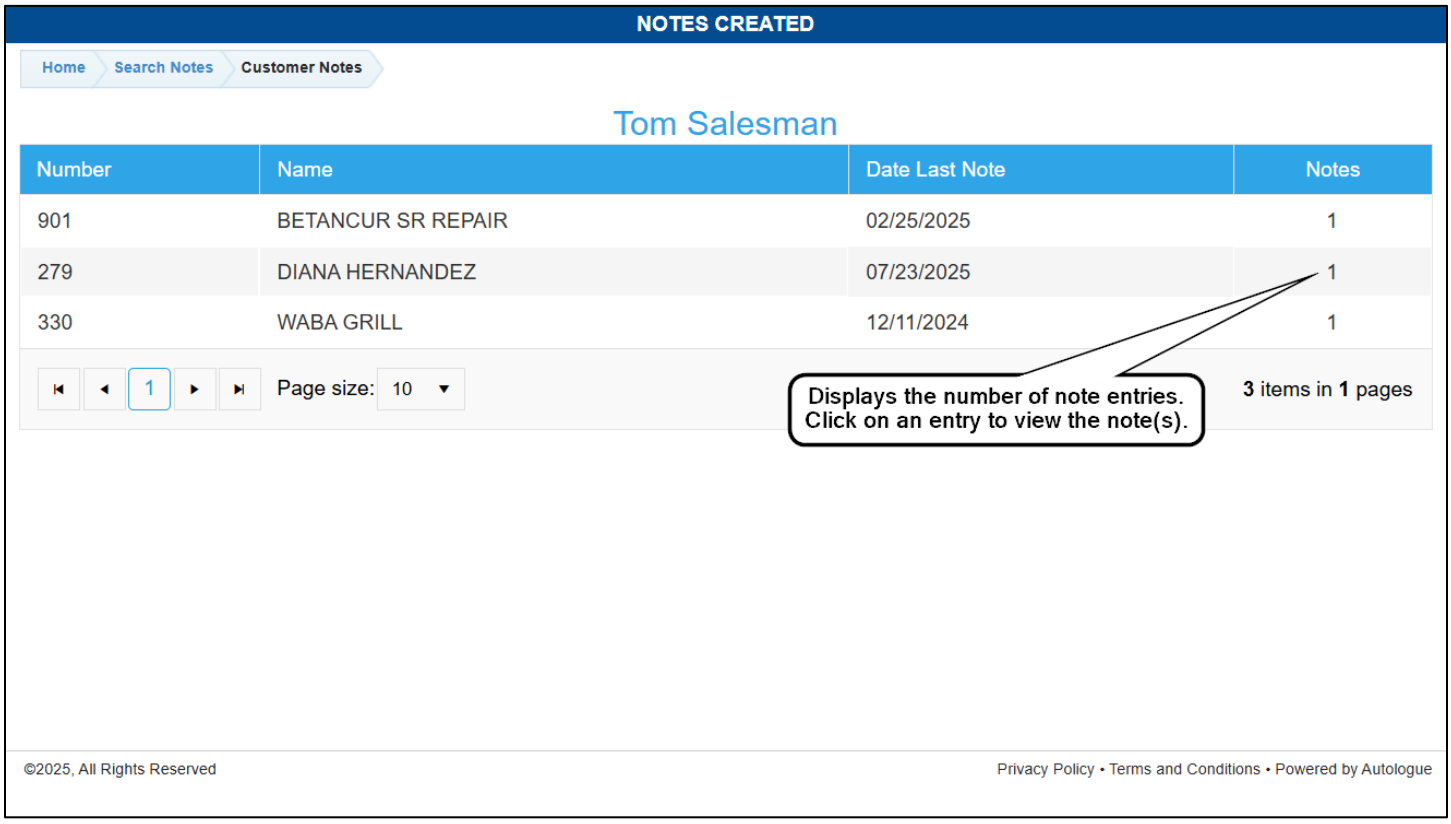


By default, no users are selected and the `From/To` dates will be from 5 days prior to the current date. A user must be selected from the `Created By` drop-down, then the `Detail` and/or `Tasks Only` can be checked to display all note detail. If neither box is checked, the screen will display as below.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



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.

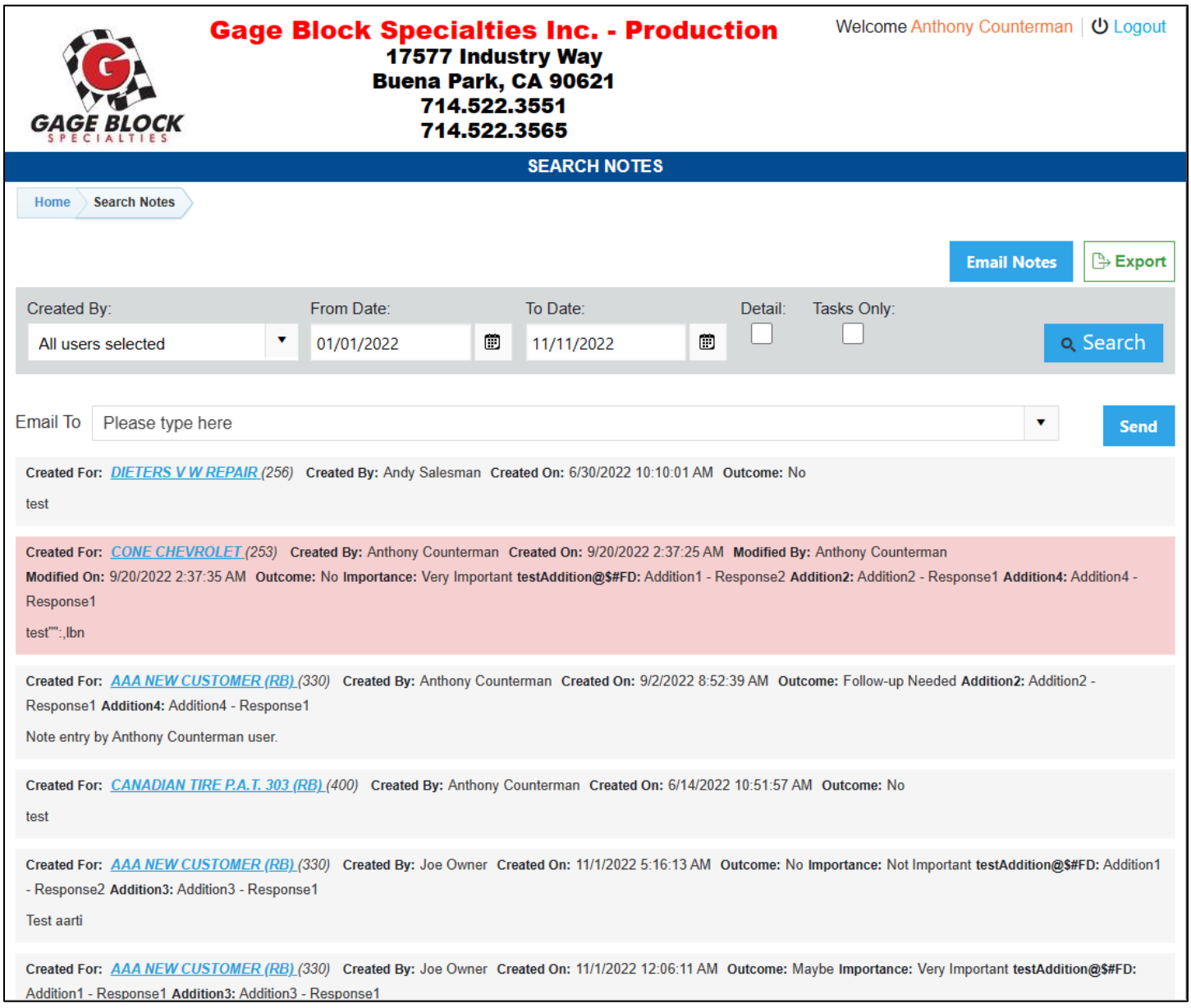


The note entry displays the actual note, the creation/last modification dates, the user names of who created/modified the note entry, and the task name (if one). A note can be emailed by clicking on the envelope (✉) icon. The existing note entry can be modified by clicking on the edit (✎) icon. Clicking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

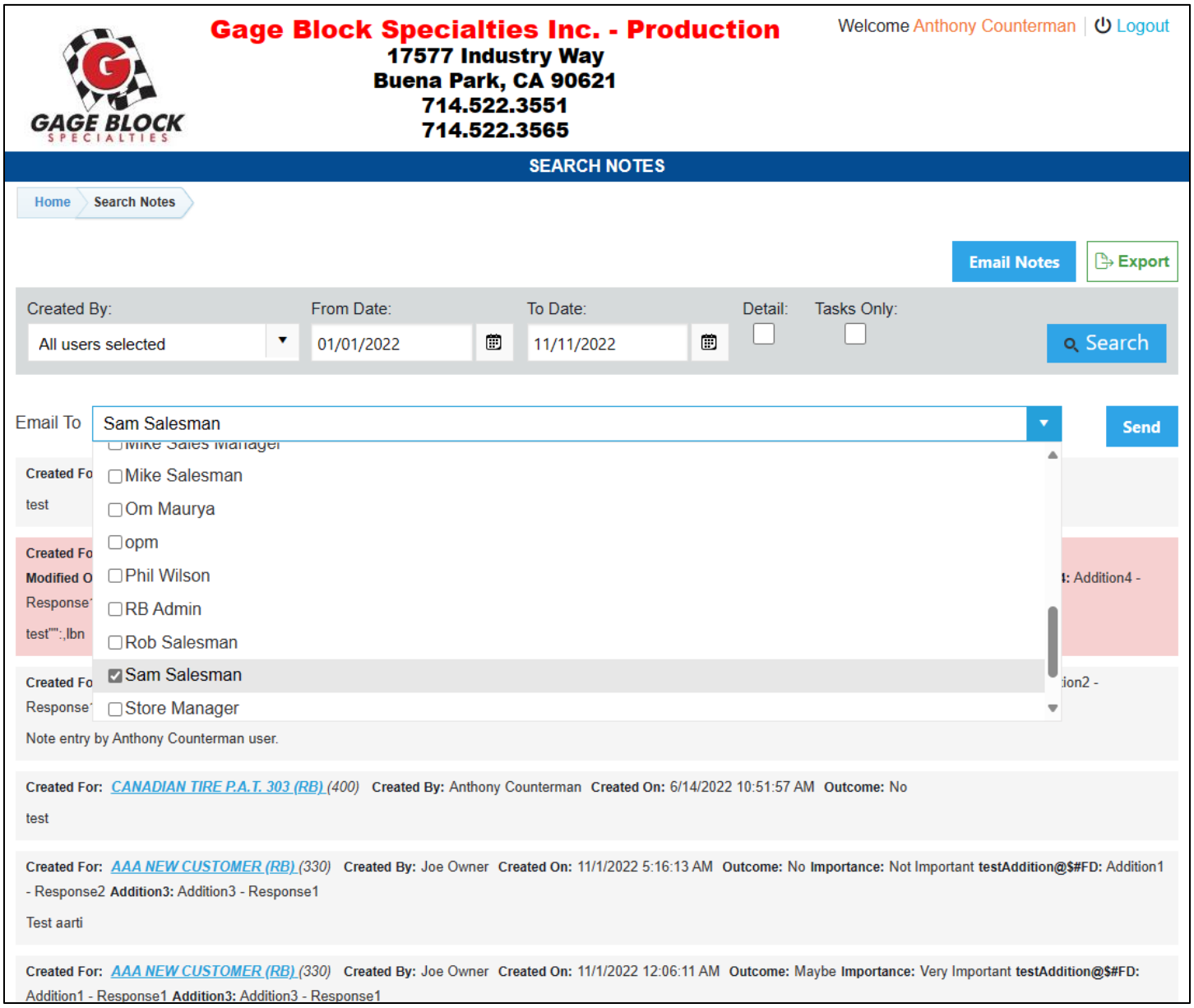
Emailing Search Notes Results

- To have the search note results emailed, click on the blue `Email Notes` button and the following screen will be displayed:

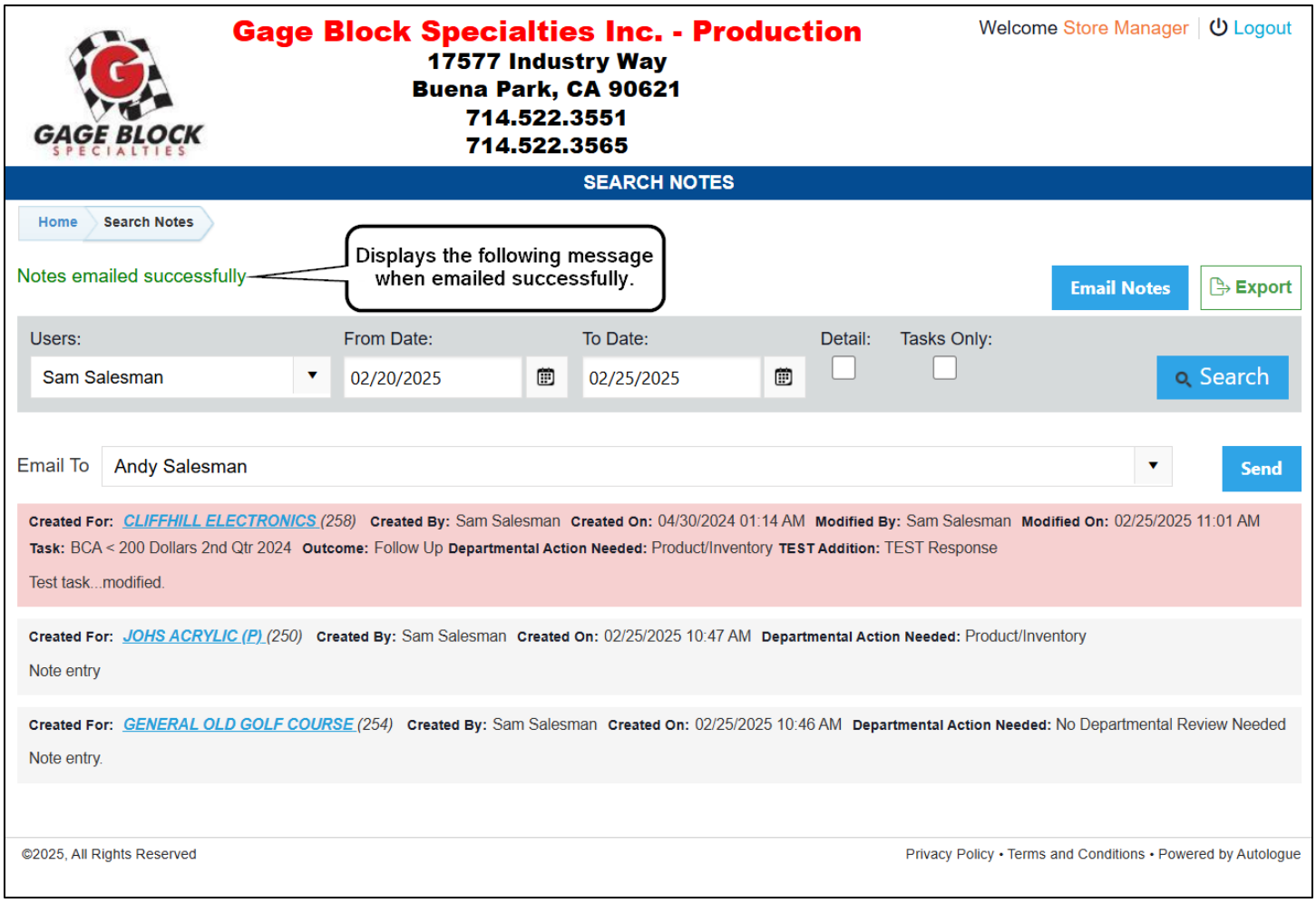


By default, the Email display option displays the notes information as the email would look.

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

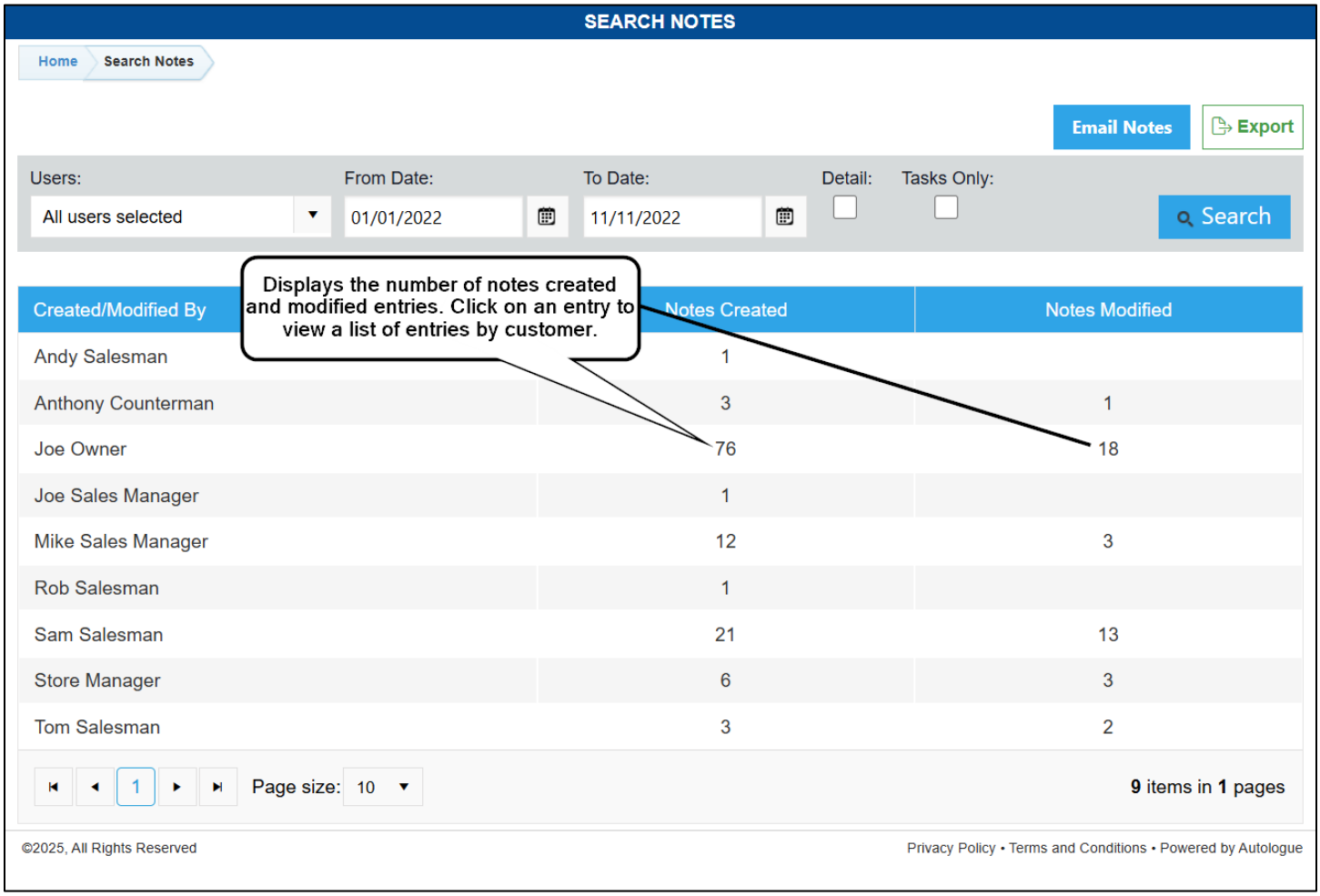


- Once users have been check marked for selection, click on the blue `Send` button, the screen should now display a green *Notes emailed successfully* message as shown:

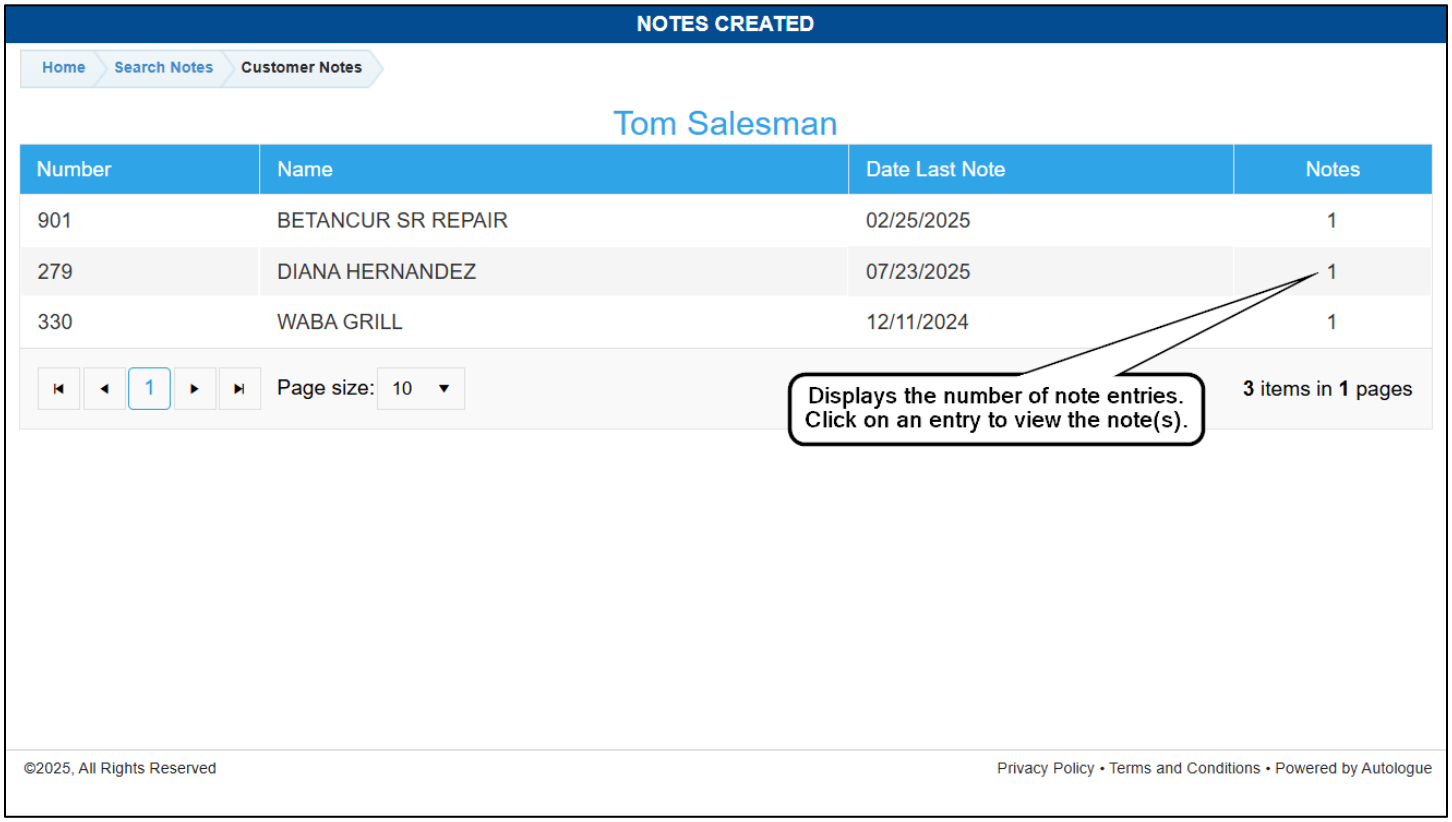


Drilling Down Into Notes

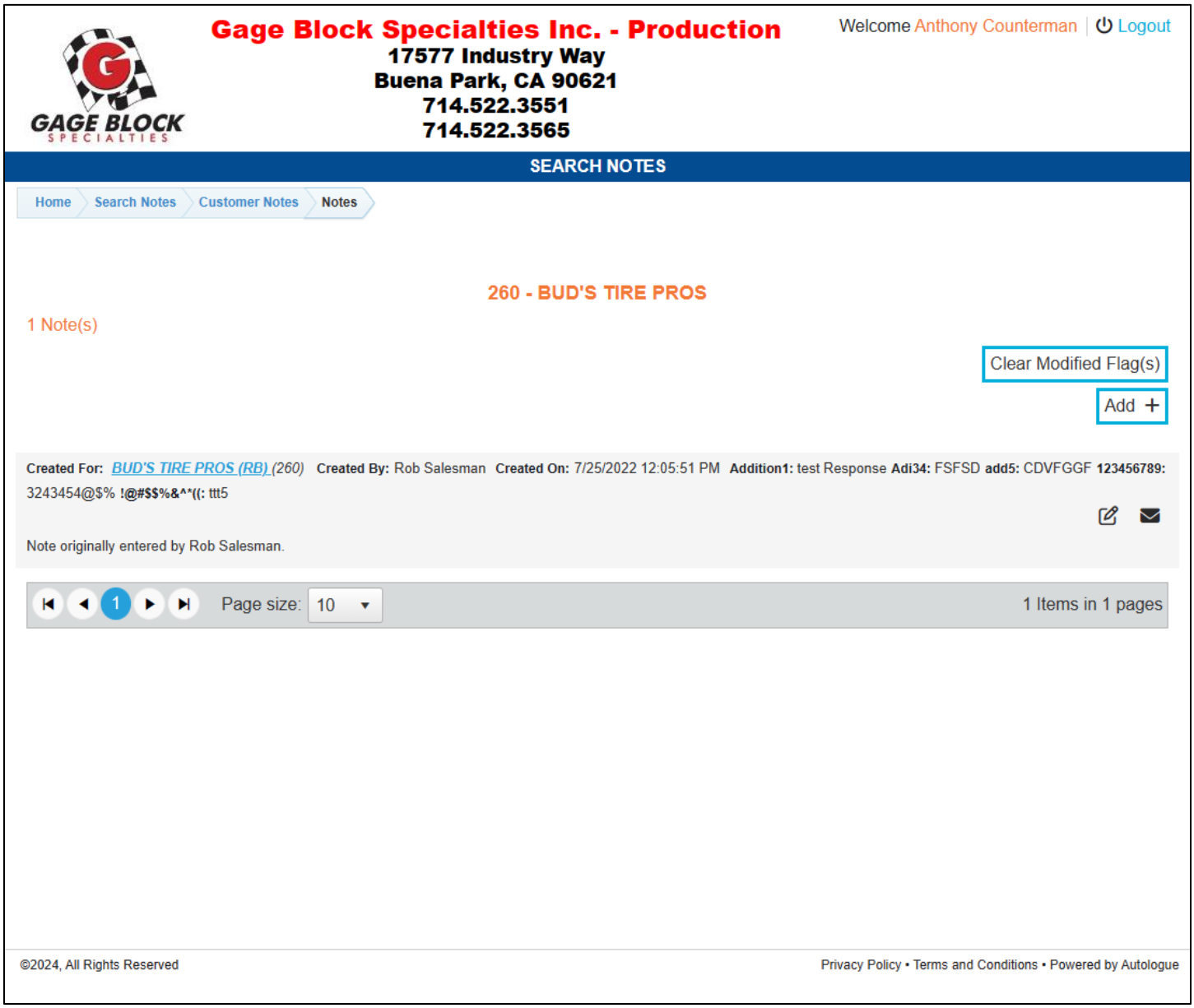
You can view or "drill down" into each of the number of note entries (listed by user) by clicking on the number of notes column to the right of the user's name. (If the `Detail` field was checked, all note detail will already be on screen):



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:



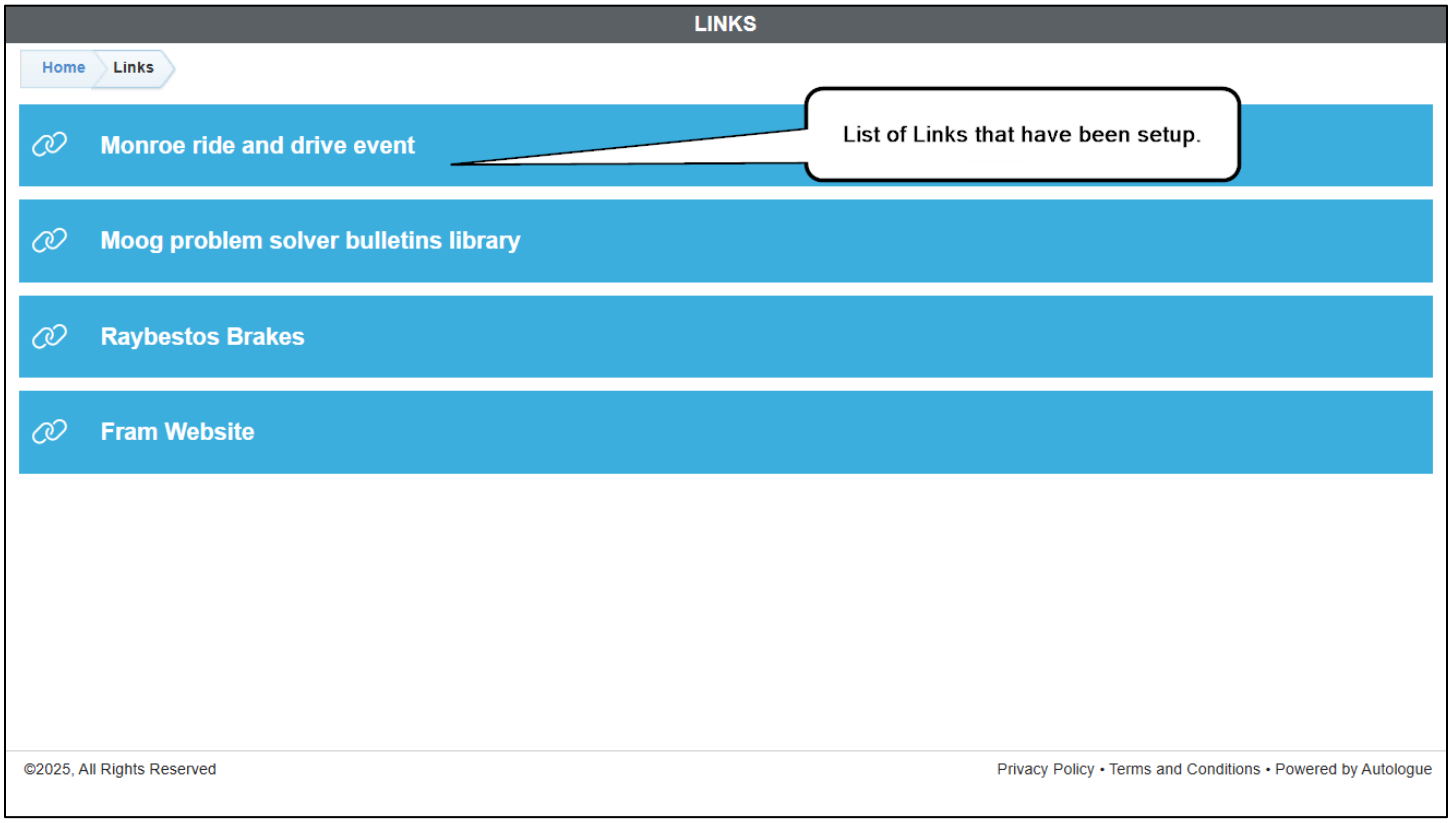
To view the note information for the customer, click on the number of notes column to the right of the customer's name. The screen will display the note entry information for each customer as shown:



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:



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.