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## eSales BI/CRM Setup















Before the eSales BI/CRM can be used, management will need to perform a few steps within the ePartConnection setup website (<http://setup.epartconnection.com>). Using your assigned Store ID and password, log into the ePartConnection setup website. The left-hand side of the screen will display a list of menu page links available. Look for the following menu options as shown:

eSalesBI
Manage BI Users / Roles
Manage Alerts/Tasks/ Notifications
Manage Goals
Sales Groups
Manage Ranking Code Descriptions
Manage Links

### Manage BI Users / Roles

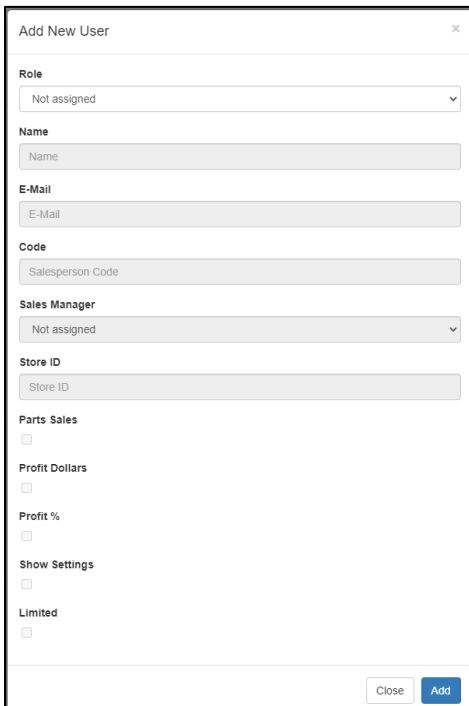
Management will need to first setup all their employees and define their roles which will determine what information they can view when they are logged into the eSales BI/CRM.

- Click on the [Manage BI Users / Roles](#) menu link and the following screen will be displayed:

Import / Export Users		Add User	Save Changes									
User id	Name	E-Mail	Code	Role	Sales Manager	Store ID	Part Sales	Profit Dollars	Profit %	Show Settings	Limited	
21830	Mike Sales Manager	roy@autologue.com		Sales Manager	Not assigned		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21859	Joe Sales Manager	roy@autologue.com		Sales Manager	Not assigned		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
21877	Mike Salesperson	roy@autologue.com	M	Sales	Mike Sales Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22951	Kimm Salesperson	kimmk@autologue.com	K	Sales	Not assigned		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22966	ePart Counterperson	roy@autologue.com	Z	Counter	Not assigned	ROYSTEST3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22973	Frank Salesperson	roy@autologue.com	F	Sales	Joe Sales Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22979	Andy Salesperson	roy@autologue.com	A	Sales	Mike Sales Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
22997	Anthony Counterperson	roy@autologue.com	A	Counter	Not assigned	ROYSTEST3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
24002	Store Manager	roy@autologue.com		Store Manager	Not assigned	ROYSTEST3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26073	Expense User 2	roy@autologue.com		Expense	Not assigned		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
26103	Back Counter Guy	roy@autologue.com	C	Counter	Not assigned	ROYSTEST3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
26107	Kimm Counterperson	kimmk@autologue.com		Counter	Not assigned	ROYSTEST3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
24874	Store Manager 2	smarrujo@autologue.com		Store Manager	Not assigned	ROYSTEST3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1103	Joe Owner	roy@autologue.com		Administration	Not assigned		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

### Adding A User

- Click the "Add User" button and the following screen will display.



The 'Add New User' dialog box contains the following fields and options:

- Role:** A drop-down menu with 'Not assigned' selected.
- Name:** A text input field with 'Name' as a placeholder.
- E-Mail:** A text input field with 'E-Mail' as a placeholder.
- Code:** A text input field with 'Salesperson Code' as a placeholder.
- Sales Manager:** A drop-down menu with 'Not assigned' selected.
- Store ID:** A text input field with 'Store ID' as a placeholder.
- Parts Sales:** A checkbox.
- Profit Dollars:** A checkbox.
- Profit %:** A checkbox.
- Show Settings:** A checkbox.
- Limited:** A checkbox.

At the bottom right, there are 'Close' and 'Add' buttons.

- Select their *Role* from the drop-down list.
- Enter the complete user's name.
- Enter the user's email address.
- For a sales user, enter their salesman code or for a counter user enter their counter code (as used in Point of Sale) within the *Code* field.

**Note: Admin and Sales/Store Managers users do not need a code**

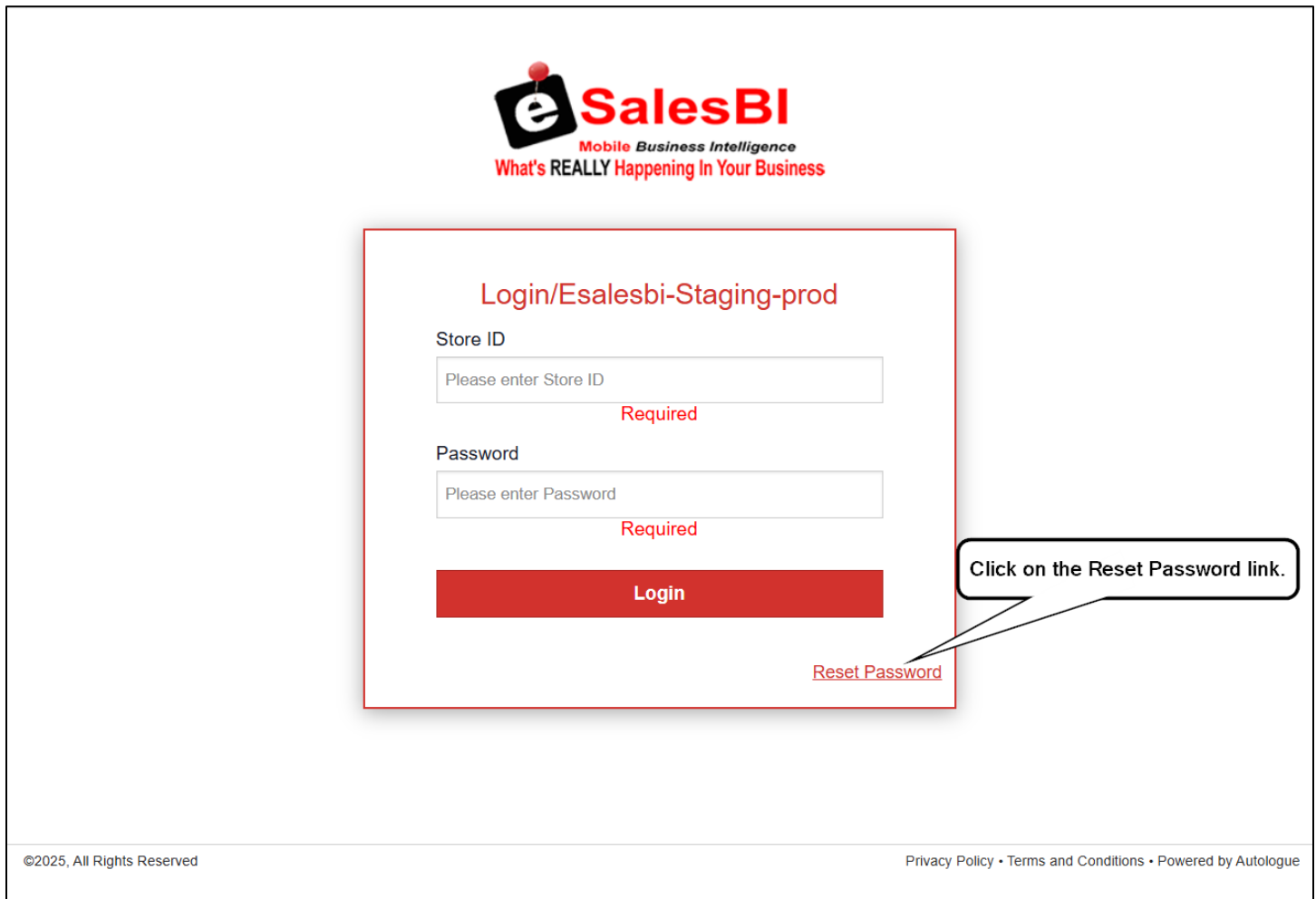
- For sales users, if they will be assigned to a Sales Manager, select the Sales Manager from the drop-down list.
- Enter a Store ID for Store Managers and Counter users.
- Checking “**Parts Sales**”, “**Profit Dollars**” or “**Profit %**” will display those lines on the user's home screen. Unchecked, will not display those lines.
- Checking “**Show Settings**” will allow the “Settings” tile to display on an Admin user's screen. It will not display when unchecked.
- Checking “**Limited**” is for Counter users, and when unchecked it will display all tiles a Sales user sees. When checked, it will only display statistics graphs. If it is an Admin user, this field when checked will not allow logging in as another user from the “Settings” tile.
- Once all fields are complete, click on the blue “**Add**” button.


## Deleting a User

- Click the red trash can (🗑) icon to the far right of the user to delete.

## Creating A Password For A New User

- To create a password for the “Setup” user, they would need to click on the *Reset Password* link from the *eSalesBI* login page (<https://www.esalesbi.com/>) as shown:



 **eSalesBI**  
Mobile Business Intelligence  
What's REALLY Happening In Your Business

Login/Esalesbi-Staging-prod

Store ID

Please enter Store ID

Required

Password

Please enter Password

Required

Login

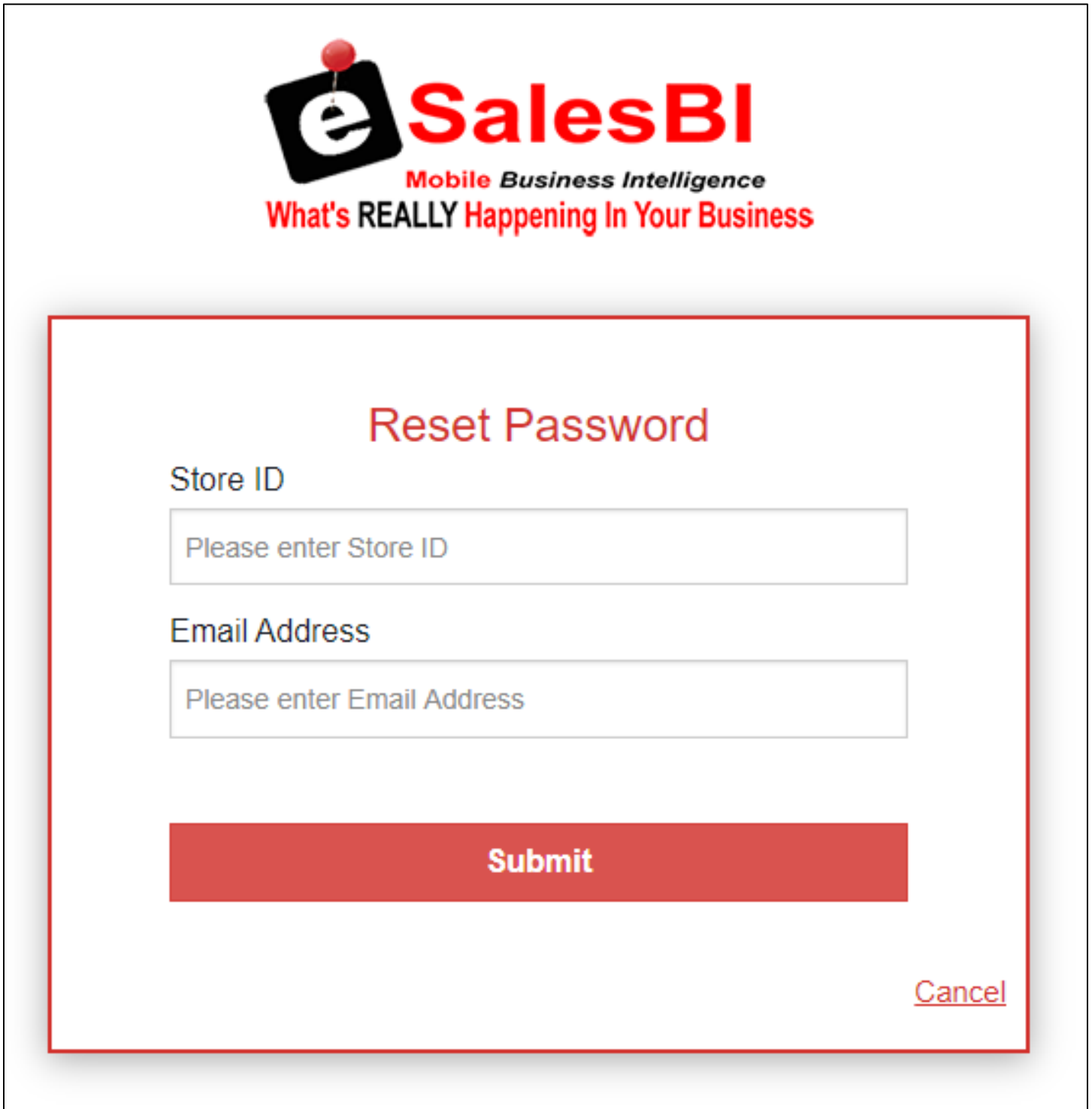
[Reset Password](#)

Click on the Reset Password link.

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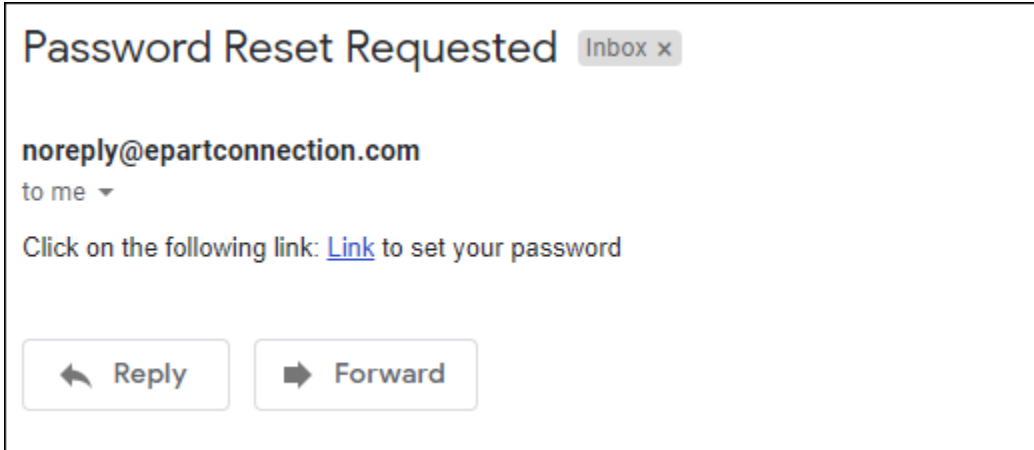
A *Reset Password* window will now be displayed as shown:



The image shows a 'Reset Password' window. At the top is the eSalesBI logo with the tagline 'Mobile Business Intelligence' and 'What's REALLY Happening In Your Business'. Below the logo, the title 'Reset Password' is centered. There are two input fields: 'Store ID' with a placeholder 'Please enter Store ID' and 'Email Address' with a placeholder 'Please enter Email Address'. A large red 'Submit' button is at the bottom center, and a red 'Cancel' link is at the bottom right.


- The user would enter their Store ID and Email Address within their respective fields and then click on the red *Submit* button.

The Login screen will display an *Email Sent* message and an email that contains a link will be automatically sent to the user as shown:





The user would click on the blue link within the email and the following *Set Password* screen would be displayed:



### Reset Password

New Password

Very Weak

Confirm Password

✗ 8 characters

✗ 1 digit or special

✗ 1 uppercase

✗ passwords match

✗ 1 lowercase

✓ select role

Name	Role	
Joe Owner	Administration	<input checked="" type="checkbox"/>

Set password

Below the password fields are *Name*, *Role* and check box fields that will be displayed for all the user roles associated with the users email address. By default, all their associated roles will be check marked. This means whatever password is entered, would apply to all the various roles check marked (if multiple). Only check mark the specific roles that the password will apply to.

- The user would enter their new password within their respective fields and then click on the red *Set password* button.

## Manage Alerts/Tasks/Notifications

Management can setup specific alerts for customers who haven't made a purchase within a specific number of days, whose sales have dropped above/below an average based on a specific number of days, or have returns over a specific percentage based on a specific number of days. Up to 4 different notifications can also be setup for reminders of upcoming meetings, gatherings or training sessions scheduled. Each alert/priority defined can have a priority of high (red), medium (yellow) or low (green). This determines which alerts/notifications are displayed first (highest to lowest).

- Click on the [Manage Alerts/Tasks/Notifications](#) menu link and the following screen will be displayed:

<div>New Item</div> <div>Search: <input type="text"/></div>						
Type	Name	Task	Start Date	End Date		
Above Average	Above Average	High	02/06/2019	12/31/9999		
Below Average	Below Average	High	12/31/2017	12/31/9999		
Imported Customer List	Custom Task Prod 1st Qtr 2022	High	01/01/2022	03/31/2022		
Imported Customer List	Custom Task Prod 2nd Qtr 2022	High	04/01/2022	06/30/2022		
Imported Customer List	Custom Task Prod 3rd Qtr 2022	High	07/01/2022	09/30/2022		
Imported Customer List	Custom Task Prod 4th Qtr 2022	High	10/01/2022	12/31/2022		
Not Purchasing	Not Purchasing In 5 Days (Cust > \$100 Last 30)	High	12/31/2017	12/31/9999		
Notification	Notification 1	High	02/28/2022	12/31/9999		
Notification	Notification 2	Med	02/28/2022	12/31/9999		
Notification	Notification 3	Low	02/28/2022	12/31/9999		
Notification	Notification 4	High	02/28/2022	12/31/9999		
Over Returned	Over Returned 5% Of Purchases Last 30	High	12/31/2017	12/31/9999		
Product Line Sales Down	BCA < 200 Dollars 1st Qtr 2022	High	01/01/2022	03/31/2022		
Product Line Sales Down	BCA < 200 Dollars 2nd Qtr 2022	High	04/01/2022	06/30/2022		

- Click on the blue *New Item* button at the top of page.
- Select a *Type* (see available Types below within the drop-down selection list).

New Item

Type

Above Average  
 Not Purchasing  
 Below Average  
 Over Returned  
 Notification  
 Product Line Units Down  
 Product Line Sales Down  
 Imported Customer List  
 Above Average

- If creating an alert, DO NOT check mark the Task box.

## Alerts/Tasks

### Above Average Alert

To create an *Above Average* alert, after selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen to enter criteria.

Alert Edit

Save Back

Above Average

Name

Above Average

Priority

High

Task

Customers with sales greater than \$

And less than \$

During the last x days

Customers x % above their daily average

For x days

Compared to the daily average for the last x days

Date (Start - End):

03/16/2022 - 12/31/9999

Filters

Users

Customers

Lines

Ranking Codes

No Filter (All Lines)

Save Back

## Criteria Fields & Descriptions

Field Name	Description
Name	Name the alert
Priority	Select a priority (High, Med or Low). Defaults to High
Customers with sales greater than \$	Provide a value for the least a customer can purchase in the defined period to qualify for consideration
And less than \$	Provide a value for the most a customer can purchase in the defined period to qualify for consideration
During the last x days	Provide the period of sales to consider
Customers x % above their daily average	Provide the percentage the customer must be above his daily average that was previously defined, in order to show as an alert
For x days	Provide the period (number of days) to use to calculate the average sales percentage that must be above his daily average to show as an alert
Compared to the daily average for the last x days	Provide the number of days to use to compute the customer's daily average
Date (Start - End):	Provide start and end dates for the alert to show in Users' screens

## Filters

Filters at the bottom of the page are used for the following:

## Users

Users define who can see the alert. Choose from the list of all users (see below). Clicking on the green *Add* button will pop up check list of all users:

Add User
✕

Name	Role	
Andy Salesman	Sales	<input type="checkbox"/>
Anthony Counterman	Counter	<input type="checkbox"/>
Bob Counterman	Counter	<input type="checkbox"/>
Chris Counterman	Counter	<input type="checkbox"/>
Disabled Salesperson	Sales	<input type="checkbox"/>
ePart Counterman	Counter	<input type="checkbox"/>
ePart Test Owner	Administration	<input type="checkbox"/>
Expense Manager	Expense	<input type="checkbox"/>
Frank Salesman	Sales	<input type="checkbox"/>
Joe Owner	Administration	<input type="checkbox"/>
Joe Sales Manager	Sales Manager	<input type="checkbox"/>
Kimm Counterperson	Counter	<input type="checkbox"/>
Kimm Salesman	Sales	<input type="checkbox"/>
Kimm Store Manager	Store Manager	<input type="checkbox"/>
Limited Store Manager	Store Manager	<input type="checkbox"/>
Mike Sales Manager	Sales Manager	<input type="checkbox"/>
Mike Salesman	Sales	<input type="checkbox"/>
Phil Wilson	Counter	<input type="checkbox"/>
RB Admin	Administration	<input type="checkbox"/>
Rob Salesman	Sales	<input type="checkbox"/>
Sam Salesman	Sales	<input type="checkbox"/>
Store Manager	Store Manager	<input type="checkbox"/>
Tom Salesman	Sales	<input type="checkbox"/>

Save

Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.

### Customers

Specific customers can be added to be considered by clicking on the green *Add* button below the filters, then entering customer numbers one by one (click on the *Save* button after each one) or by importing a list of customers to consider.

Add Customer

CSV and XLSX files are supported that have 2 columns. Column 1 is "Customer Number" and column 2 is "Notes"

**Customer Number**

### Lines

Specific product lines and sublines can be added to be considered by clicking on the green *Add* button below the filters, then entering line code and subline code one by one (click on the *Save* button after each one).

Add Linecode

**Line Code**

**SubLine Code**

(Use an asterisk (\*) for "All Subline Codes")

### Ranking Codes

Customer ranking codes can be added to further narrow the list of customers to be considered by clicking on the green *Add* button below the filters, then entering each specific ranking code one by one (click on the *Save* button after each one).

Add Rank Code

**Rank Code**

Once all the criteria have been entered, click on the blue *Save* button at the bottom of the page.

Another alert for **Above Average** can now be created using different criteria. Use the **Name** field to differentiate between the same types of alerts being viewed on the main screen.

### Below Average Alert

To create a **Below Average** alert, after selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen to enter criteria. This is the same as the **Above Average** setup, with the exception it shows customers **Below** their daily average. Follow the instructions above.

### Not Purchasing Alert

To create a **Not Purchasing** alert, after selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen to enter criteria.

Alert Edit

Save Back

Not Purchasing

Name

Not Purchasing

Priority

High

Task

Customers with sales greater than \$

And less than \$

During the last x days

That have not purchased in x days

Date (Start - End):

03/16/2022 - 12/31/9999

Filters

Users Customers Lines Ranking Codes

No Filter (All Ranks)

Save Back

### Criteria Fields & Descriptions

Field Name	Description
Name	Name the alert
Priority	Select a priority (High, Med or Low). Defaults to High
Customers with sales greater than \$	Provide a value for the least a customer can purchase in the defined period to qualify for consideration
And less than \$	Provide a value for the most a customer can purchase in the defined period to qualify for consideration
During the last x days	Provide the period of sales to consider
That have not purchased in x days	Provide the number of days that the customer has made NO purchases to qualify for the alert

Date (Start - End):

Provide start and end dates for the alert to show in Users' screens

## Filters

Filters at the bottom of the page are used for the following:

## Users

Users define who can see the alert. Choose from the list of all users (see below). Clicking on the green *Add* button will pop up check list of all users:

Add User
×

Name	Role	
Andy Salesman	Sales	<input type="checkbox"/>
Anthony Counterman	Counter	<input type="checkbox"/>
Bob Counterman	Counter	<input type="checkbox"/>
Chris Counterman	Counter	<input type="checkbox"/>
Disabled Salesperson	Sales	<input type="checkbox"/>
ePart Counterman	Counter	<input type="checkbox"/>
ePart Test Owner	Administration	<input type="checkbox"/>
Expense Manager	Expense	<input type="checkbox"/>
Frank Salesman	Sales	<input type="checkbox"/>
Joe Owner	Administration	<input type="checkbox"/>
Joe Sales Manager	Sales Manager	<input type="checkbox"/>
Kimm Counterperson	Counter	<input type="checkbox"/>
Kimm Salesman	Sales	<input type="checkbox"/>
Kimm Store Manager	Store Manager	<input type="checkbox"/>
Limited Store Manager	Store Manager	<input type="checkbox"/>
Mike Sales Manager	Sales Manager	<input type="checkbox"/>
Mike Salesman	Sales	<input type="checkbox"/>
Phil Wilson	Counter	<input type="checkbox"/>
RB Admin	Administration	<input type="checkbox"/>
Rob Salesman	Sales	<input type="checkbox"/>
Sam Salesman	Sales	<input type="checkbox"/>
Store Manager	Store Manager	<input type="checkbox"/>
Tom Salesman	Sales	<input type="checkbox"/>

Save

Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.

## Customers

Specific customers can be added to be considered by clicking on the green *Add* button below the filters, then entering customer numbers one by one (click on the *Save* button after each one) or by importing a list of customers to consider.



Add Customer
×

CSV and XLSX files are supported that have 2 columns. Column 1 is "Customer Number" and column 2 is "Notes"

**Customer Number**

Save

## Lines

Specific product lines and sublines can be added to be considered by clicking on the green *Add* button below the filters, then entering line code and subline code one by one (click on the *Save* button after each one).

Add Linecode
×

**Line Code**

**SubLine Code**

(Use an asterisk (\*) for "All Subline Codes")

Save

## Ranking Codes

Customer ranking codes can be added to further narrow the list of customers to be considered by clicking on the green *Add* button below the filters, then entering each specific ranking code one by one (click on the *Save* button after each one).

Add Rank Code
×

**Rank Code**

Save

Once all the criteria have been entered, click on the blue *Save* button at the bottom of the page.

Another alert for ***Not Purchasing*** can now be created using different criteria. Use the ***Name*** field to differentiate between the same types of alerts being viewed on the main screen.

## Over Returns Alert

Alert Edit

Save Back

Over Returned

Name

Over Returned

Priority

High

Task ☐

Customers with over x % returns of their purchase

For each of the last x days

Date (Start - End):

04/11/2022 - 12/31/9999

Filters

Users

Customers

Lines

Ranking Codes

No Filter (All Lines)

+

Save Back

## Criteria Fields & Descriptions

Field Name	Description
Name	Name the alert.
Priority	Select a priority (High, Med or Low). Defaults to High.
Customers with over x% returns of their purchases	Provide a value for the percentage of returns versus their purchases that will qualify them for this alert.
For each of the last x days	Provide the number of days of sales (purchases) to compare versus the return purchases. If the percentage of returns exceeds the percentage defined, an alert is created.
Date (Start - End):	Provide start and end dates for the alert to show in Users' screens.

## Filters

Filters at the bottom of the page are used for the following:

## Users

Users define who can see the alert. Choose from the list of all users (see below). Clicking on the green *Add* button will pop up check list of all users:

Add User
✕

Name	Role	
Andy Salesman	Sales	<input type="checkbox"/>
Anthony Counterman	Counter	<input type="checkbox"/>
Bob Counterman	Counter	<input type="checkbox"/>
Chris Counterman	Counter	<input type="checkbox"/>
Disabled Salesperson	Sales	<input type="checkbox"/>
ePart Counterman	Counter	<input type="checkbox"/>
ePart Test Owner	Administration	<input type="checkbox"/>
Expense Manager	Expense	<input type="checkbox"/>
Frank Salesman	Sales	<input type="checkbox"/>
Joe Owner	Administration	<input type="checkbox"/>
Joe Sales Manager	Sales Manager	<input type="checkbox"/>
Kimm Counterperson	Counter	<input type="checkbox"/>
Kimm Salesman	Sales	<input type="checkbox"/>
Kimm Store Manager	Store Manager	<input type="checkbox"/>
Limited Store Manager	Store Manager	<input type="checkbox"/>
Mike Sales Manager	Sales Manager	<input type="checkbox"/>
Mike Salesman	Sales	<input type="checkbox"/>
Phil Wilson	Counter	<input type="checkbox"/>
RB Admin	Administration	<input type="checkbox"/>
Rob Salesman	Sales	<input type="checkbox"/>
Sam Salesman	Sales	<input type="checkbox"/>
Store Manager	Store Manager	<input type="checkbox"/>
Tom Salesman	Sales	<input type="checkbox"/>

Save

Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.

### Customers

Specific customers can be added to be considered by clicking on the green *Add* button below the filters, then entering customer numbers one by one (click on the *Save* button after each one) or by importing a list of customers to consider.

Add Customer
×

CSV and XLSX files are supported that have 2 columns. Column 1 is "Customer Number" and column 2 is "Notes"

**Customer Number**



### Lines

Specific product lines and sublines can be added to be considered by clicking on the green *Add* button below the filters, then entering line code and subline code one by one (click on the *Save* button after each one).

Add Linecode
×

**Line Code**

**SubLine Code**

(Use an asterisk (\*) for "All Subline Codes")

### Ranking Codes

Customer ranking codes can be added to further narrow the list of customers to be considered by clicking on the green *Add* button below the filters, then entering each specific ranking code one by one (click on the *Save* button after each one).

Add Rank Code
×

**Rank Code**



Once all the criteria have been entered, click on the blue *Save* button at the bottom of the page.

## Notification

To create a **Notification**, after selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen.

Alert Edit

Save Back

Notification

Name  
Notification 1

Priority  
High

Task ☐

Notification Text  
Notification 1 Old Alert High Priority

Date (Start - End):  
02/28/2022 - 12/31/9999

Filters  
Users  
No Filter (All Users)

Save Back

## Criteria Fields & Descriptions

Field Name	Description
Name	Name the notification
Priority	Select a priority (High, Med or Low). Defaults to High
Notification Text	Enter the text to be displayed for users
Date (Start - End):	Provide start and end dates for the notification to show in Users' screens

## Filters

The only filter available is for users.

## Users

Users define who can see the alert. Choose from the list of all users (see below). Clicking on the green *Add* button will allow that user to see results of this alert.

Add User
✕

Name	Role	
Andy Salesman	Sales	<input type="checkbox"/>
Anthony Counterman	Counter	<input type="checkbox"/>
Bob Counterman	Counter	<input type="checkbox"/>
Chris Counterman	Counter	<input type="checkbox"/>
Disabled Salesperson	Sales	<input type="checkbox"/>
ePart Counterman	Counter	<input type="checkbox"/>
ePart Test Owner	Administration	<input type="checkbox"/>
Expense Manager	Expense	<input type="checkbox"/>
Frank Salesman	Sales	<input type="checkbox"/>
Joe Owner	Administration	<input type="checkbox"/>
Joe Sales Manager	Sales Manager	<input type="checkbox"/>
Kimm Counterperson	Counter	<input type="checkbox"/>
Kimm Salesman	Sales	<input type="checkbox"/>
Kimm Store Manager	Store Manager	<input type="checkbox"/>
Limited Store Manager	Store Manager	<input type="checkbox"/>
Mike Sales Manager	Sales Manager	<input type="checkbox"/>
Mike Salesman	Sales	<input type="checkbox"/>
Phil Wilson	Counter	<input type="checkbox"/>
RB Admin	Administration	<input type="checkbox"/>
Rob Salesman	Sales	<input type="checkbox"/>
Sam Salesman	Sales	<input type="checkbox"/>
Store Manager	Store Manager	<input type="checkbox"/>
Tom Salesman	Sales	<input type="checkbox"/>

Save

Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.

Once all the criteria have been entered, click on the blue *Save* button at the bottom of the page.

Another **Notification** can now be created using different criteria. Use the **Name** field to differentiate between the same types of notifications being viewed on the main screen.

## Product Lines Units Down

After selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen.

Alert Edit

SaveBack

Product Line Units Down

Name  
Product Line Units Down

Priority  
High

Task ☐

Customers purchasing less than x units

Within the last x days

Date (Start - End):  
03/17/2022 - 12/31/9999

Filters  
Users Customers Lines Ranking Codes

No Filter (All Ranks)

+

SaveBack

## Criteria Fields & Descriptions

Field Name	Description
Name	Name the task
Priority	Select a priority (High, Med or Low). Defaults to High
Customers purchasing less than x units	Provide a value the customer must be below in the defined period to qualify for consideration
Within the last x days	Provide the time period for Unit Purchases to qualify for consideration
Date (Start - End):	Provide start and end dates for the task to show in Users' screens

## Filters

Filters at the bottom of the page are used for the following:

## Users

Users define who can see the alert. Choose from the list of all users (see below). Clicking on the green *Add* button will allow that user to see results of this alert.

Add User
×

Name	Role	
Andy Salesman	Sales	<input type="checkbox"/>
Anthony Counterman	Counter	<input type="checkbox"/>
Bob Counterman	Counter	<input type="checkbox"/>
Chris Counterman	Counter	<input type="checkbox"/>
Disabled Salesperson	Sales	<input type="checkbox"/>
ePart Counterman	Counter	<input type="checkbox"/>
ePart Test Owner	Administration	<input type="checkbox"/>
Expense Manager	Expense	<input type="checkbox"/>
Frank Salesman	Sales	<input type="checkbox"/>
Joe Owner	Administration	<input type="checkbox"/>
Joe Sales Manager	Sales Manager	<input type="checkbox"/>
Kimm Counterperson	Counter	<input type="checkbox"/>
Kimm Salesman	Sales	<input type="checkbox"/>
Kimm Store Manager	Store Manager	<input type="checkbox"/>
Limited Store Manager	Store Manager	<input type="checkbox"/>
Mike Sales Manager	Sales Manager	<input type="checkbox"/>
Mike Salesman	Sales	<input type="checkbox"/>
Phil Wilson	Counter	<input type="checkbox"/>
RB Admin	Administration	<input type="checkbox"/>
Rob Salesman	Sales	<input type="checkbox"/>
Sam Salesman	Sales	<input type="checkbox"/>
Store Manager	Store Manager	<input type="checkbox"/>
Tom Salesman	Sales	<input type="checkbox"/>

Save

Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.



## Customers

Specific customers can be added to be considered by clicking on the green *Add* button below the filters, then entering customer numbers one by one (click on the *Save* button after each one) or by importing a list of customers to consider.

Add Customer

CSV and XLSX files are supported that have 2 columns. Column 1 is "Customer Number" and column 2 is "Notes"

**Customer Number**

## Lines

Specific product lines and sublines can be added to be considered by clicking on the green *Add* button below the filters, then entering line code and subline code one by one (click on the *Save* button after each one).

Add Linecode

**Line Code**

**SubLine Code**

(Use an asterisk (\*) for "All Subline Codes")

## Ranking Codes

Customer ranking codes can be added to further narrow the list of customers to be considered by clicking on the green *Add* button below the filters, then entering each specific ranking code one by one (click on the *Save* button after each one).

Add Rank Code

**Rank Code**

Once all the criteria have been entered, click on the blue *Save* button at the bottom of the page.

Another task for **Product Line Units Down** can now be created using different criteria. Use the *Name* field to differentiate between the same types of tasks being viewed on the main screen.

## Product Line Sales Down

To create a **Product Line Sales Down** task, after selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen to enter criteria. This is the same as the **Product Line Units Down** setup, with the exception it shows customers **Below** the specified sales dollars versus units sales. Follow the instructions above.

In both task types above, in the Salesperson's Task tile, the *Message* column displayed next to each customer will show why that customer met the criteria (see below):

Task	Number	Name	Message	
BCA < 200 Dollars 1st Qtr 2022 (01/01/2022 - 03/31/2022)	256	DIETERS V W REPAIR	Purchased \$0.00 from product line BCA	
Fram < 30 Units 1st Qtr 2022 (01/01/2022 - 03/31/2022)	256	DIETERS V W REPAIR	Purchased 0 units(s) from product line FRA	

## Imported Customer List

The **Imported Customer List** task type is for creating a task for specific customers. The task is defined within the Name field.

### Alert Edit

Save

Back

Imported Customer List

Name

Imported Customer List

Priority

High

Task

☒

Date (Start - End):

08/15/2024 - 12/31/9999

Filters

Specify additional filtering criteria for Alerts/Tasks here

Users

Customers

All Users (Click 'Add' to limit to specific Users)

Add

Save

Back

### Customers

The list of customers is loaded within the Customers filter (see below). Accessed by clicking on the green *Add* button below the filters.

Add Customer
×

CSV and XLSX files are supported that have 2 columns. Column 1 is "Customer Number" and column 2 is "Notes"

**Customer Number**

**Note**

This accepts a CSV (comma separated value)/XLSX (Excel spreadsheet) file with columns "Customer Number, Note". These lists can also be created manually entering one customer at a time.

In the Salesperson's Task tile, the *Message* column displayed next to each customer is defined within the import file.

In all Alert and Task types, clicking on the gold *Back* button will close that screen without saving anything.

All Alerts and Tasks created will take effect the following day, or the start date that is set to a later date.

### Manage Goals

Management can setup monthly sales goals for each of their counterpartpersons, salespersons and also for the store. These monthly goals will be reflected on the dashboards for each employee type. The yearly goals will be based on the entered monthly goals for the twelve months.

- Click on the [Manage Goals](#) menu link and the following screen will be displayed:

Manage Goals

Counterperson
Store

Copy Jan. To All

## Entering A Salesperson Goal

- To enter a salesperson goal, click on the [Salesperson](#) tab.
- Click within the *Select Salesperson* drop-down field and select the salesperson to enter goals for.

The screen will display a table grid with twelve rows (months) that contains three entry fields (*Profit Dollars*, *Gross Margin %*, *Sales Dollars*) for setting up the salesperson's monthly sales goal information.

- For each month, click within the *Profit Dollars* column and enter the monthly goal amount including the decimal.
- For each month, click within the *Gross Margin %* column and enter the monthly goal amount including the decimal.
- For each month, click within the *Sales Dollars* column and enter the monthly goal amount including the decimal.
- Once all the information has been entered, click on the blue [Save Changes](#) button at the top of the screen and the entered sales goal information will be saved.

☞ **Optionally, you can click on the [Copy Jan. To All](#) button to copy the January entered goals into all the months.**

## Entering A Store Goal

- To enter a store goal, click on the [Store](#) tab.
- Click within the *Select Store* drop-down field and select the store to enter goals for.

The screen will display a table grid with twelve rows (months) that contains three entry fields (*Profit Dollars*, *Gross Margin %*, *Sales Dollars*) for setting up the store's monthly sales goal information.

- For each month, click within the *Profit Dollars* column and enter the monthly goal amount including the decimal.
- For each month, click within the *Gross Margin %* column and enter the monthly goal amount including the decimal.
- For each month, click within the *Sales Dollars* column and enter the monthly goal amount including the decimal.
- Once all the information has been entered, click on the blue [Save Changes](#) button at the top of the screen and the entered sales goal information will be saved.

☞ **Optionally, you can click on the [Copy Jan. To All](#) button to copy the January entered goals into all the months.**

## Entering A Counterperson Goal

- To enter a counterperson goal, click on the [Counterperson](#) tab.
- Click within the *Select Counterperson* drop-down field and select the counterperson to enter goals for.

The screen will display a table grid with twelve rows (months) that contains seven entry fields (*Profit Dollars*, *Sales Dollars*, *Gross Margin %*, *Return %*, *Invoice Count*, *Avg Item Count*, *Award %*) for setting up the counterperson's monthly sales goal information.

- For each month, click within the *Profit Dollars* column and enter the monthly goal amount including the decimal.
- For each month, click within the *Gross Margin %* column and enter the monthly goal amount including the decimal.
- For each month, click within the *Sales Dollars* column and enter the monthly goal amount including the decimal.

- For each month, click within the *Return %* field and enter the monthly goal for return percentage including the decimal.
  - For each month, click within the *Invoice Count* field and enter the monthly goal for the number of invoices.
  - For each month, click within the *Avg Item Count* field and enter the monthly goal for the average item count per invoice including the decimal.
  - For each month, click within the *Award %* field and optionally enter in a commission percentage including the decimal for the counterperson. Commissions are based upon the sales dollars above the monthly sales dollars goal. If no commissions are used, simply enter a zero within the field.
  - Once all the information has been entered, click on the blue [Save Changes](#) button at the top of the screen and the entered sales goal information will be saved.
- ☞ **Optionally, you can click on the [Copy Jan. To All](#) button to copy the January entered goals into all the months.**

## Editing An Existing Goal Entry

- Within any of the role screens, click within any of the fields allows you to modify an existing entry within the goals table. Once all the information has been modified, click on the blue [Save Changes](#) button at the top of the screen and the modified sales goal information will be saved.

## Importing Goals

All Goals can be imported at one time if desired. This includes Salesperson, Store and Counterperson. From the *Manage Goals* page, click on the *Import/Export Goals* button at the top of the page. The user will see the following popup:

Import / Export

Select Export/Import Role

Counterperson

Choose file

☐ Remove goals not in import file?

Import Excel

Export Excel

Import file must be a **.xlsx**. Please review the [Documentation](#) for information on creating an import document.

You can download an example document [here](#)

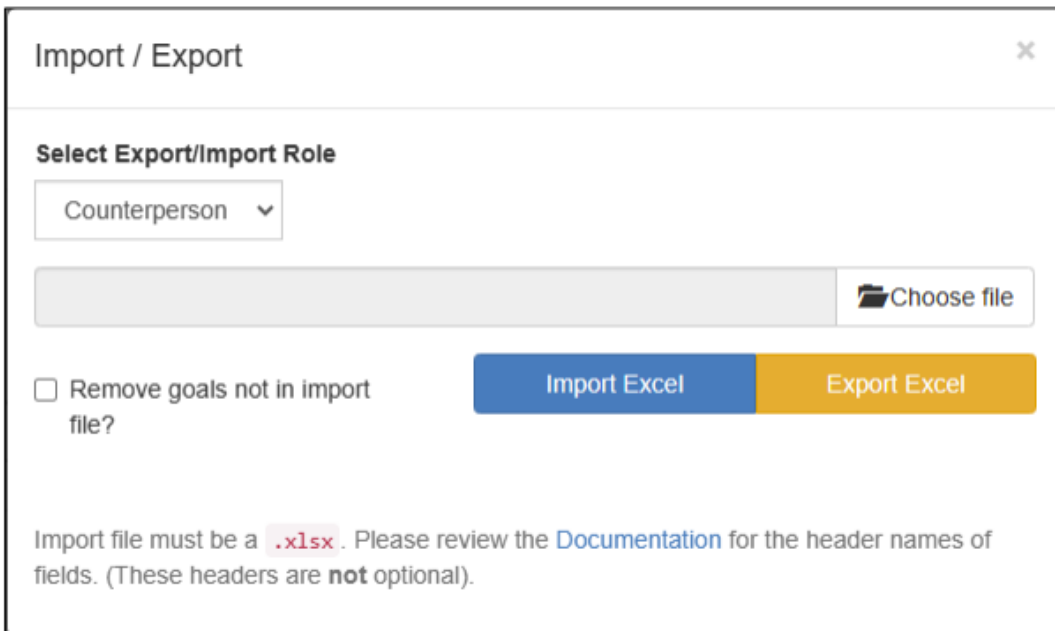
To view detailed instructions on how to import/export goals, clicking on the blue [Documentation](#) link and a new tab window will open and display the instruction information as shown:

### Manage Goals: Import/Export Instructions

1. Login to *ePart Setup*->*Manage Goals*
2. Click on the **Import/Export Goals** button:



The following *Import / Export* pop up window will now be displayed:



The exporting and importing of goals information for stores, salespersons and counterpersons are performed through single Excel spreadsheets. When wanting to import goals for your stores,

By clicking on the blue [here](#) text link, a template spreadsheet file will be downloaded. It contains a separate sheet for each type of goal. Simply enter the data to upload, save and choose that file to upload. (Note: UserID column for Salesperson and Counterperson goals refers to the ID within the Admin's Setup tile in their eSales home screen under *Users & Emails*)

## Sales Groups

Management can setup specific sales groups to include specific manufacturer product lines/sublines to display sales data for by counterpersons, salespersons and also for administrators.

- Click on the [Sales Groups](#) menu link and the following screen will be displayed:



Sales Group Name	Edit Sales Group Name	Edit Lines	
Accessories Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Brake Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Cooling Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Duplicate Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Engine Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Miscellaneous Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Tune Up Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	
Wiper Products	<a href="#">Edit Sales Group Name</a>	<a href="#">Edit Lines</a>	

## Adding A New Sales Group Label

- To add a new sales group label entry, click on the green [Add Sales Group](#) button and the following *Add New Group* pop-up window will display as shown:



Add New Group ×

Group

Group

Close

Add

- Enter in a sales group description and then click on the blue [Add](#) button.
- Click on the blue [Save Changes](#) button at the top of the page to save the change.

## Editing A Sales Group Name

- To edit an existing sales group name entry, click on the blue [Edit Sale Group Name](#) button to the right of the sales group description. Click within the *Group* field, enter the desired changes and then click on the blue [Update](#) button. Click on the blue [Save Changes](#) button at the top of the page to save the change.

## Deleting An Existing Sales Group

- To delete an existing sales group entry, click on the red trash can button to the right of the sales group description and the sales group will be removed from the table. Click on the blue [Save Changes](#) button at the top of the page to save the change.

## Setting Up Line Codes For A Sales Group

- To setup the specific line codes for a sales group, click on the blue [Edit Lines](#) button to the right of the sales group description and the following *Edit Lines* pop-up window will display as shown:

Edit Lines

Line Code	Sub Line
BCA	
NAT	

NEW LINE CODE

NEW SUB LINE ( \* FOR ALL)

Close

Add

Any existing line codes will be displayed.

- To add a new line code, click within the blank *NEW LINE CODE* field and enter in the desired line code. Click within the *NEW SUB LINE (\* FOR ALL)* field and enter in the desired subline and then click on the blue [Add](#) button. Line codes and sublines can be deleted using the red trash can icon buttons. To exit from the Edit Lines pop-up window, click on the [Close](#) button. Click on the blue [Save Changes](#) button at the top of the page to save the change.



## Manage Ranking Code Descriptions

### Manage Links

Management can direct their employees to specific webpages/websites to promote special events, special pricing, problem solving solutions, etc. These opportunities must be linked to a webpage/website.

- Click on the [Manage Links](#) menu link and the following screen will be displayed:

Description	Web Page				
Monroe ride and drive event	<a href="http://www.monroe.com/en-US/events/">http://www.monroe.com/en-US/events/</a>	Up	Down	Edit	Delete
Moog problem solver bulletins library	<a href="http://www.moogproblemsolver.com/category/problem-">http://www.moogproblemsolver.com/category/problem-</a>	Up	Down	Edit	Delete
Get your online ePricing here	<a href="http://www.autologue.com/acscart/subscriberlogin.a">http://www.autologue.com/acscart/subscriberlogin.a</a>	Up	Down	Edit	Delete
Manage Opportunities Production	<a href="https://abtrainingacademy.com">https://abtrainingacademy.com</a>	Up	Down	Edit	Delete
<input type="text"/>	<input type="text"/>	<a href="#">Add</a>			
<a href="#">Save Links</a>					

### New Entry

- To add a new opportunity entry, click within the blank *Description* field and enter in a description for the link. Next, click within the blank *Web Page* field and enter in the web page URL. Click on the [Add](#) and then click on the [Save Links](#) buttons to save the new entry.

### Rearranging Entries

- Menu items can be rearranged by clicking on the [Up](#) / [Down](#) buttons beside each entry.

### Editing An Existing Entry

- Clicking on the [Edit](#) button allows you to modify an existing link entry. Once all the information has been modified, click on the [Update](#) and then click on the [Save Links](#) buttons to save the edited entry.

### Deleting An Existing Entry

- To delete an existing entry, click on the [Delete](#) button beside the link entry to be removed and then click on the [Save Links](#) button at the bottom of the page to save the change.

### Customer Options/Favorites

- To flag specific customers (customer number & name will display with red text throughout eSalesBI), click on the pencil icon next to the customer record. Then enter anything within the *Account Code* field and click on the blue [Submit](#) button. When the *Account Code* field is blank, the customer number & name will display with the normal black text throughout eSalesBI.