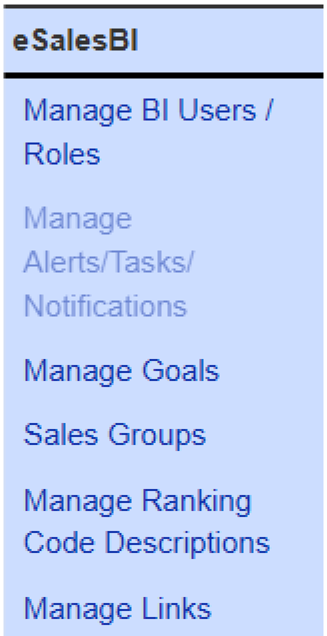
# Table of Contents

## eSales BI/CRM Setup

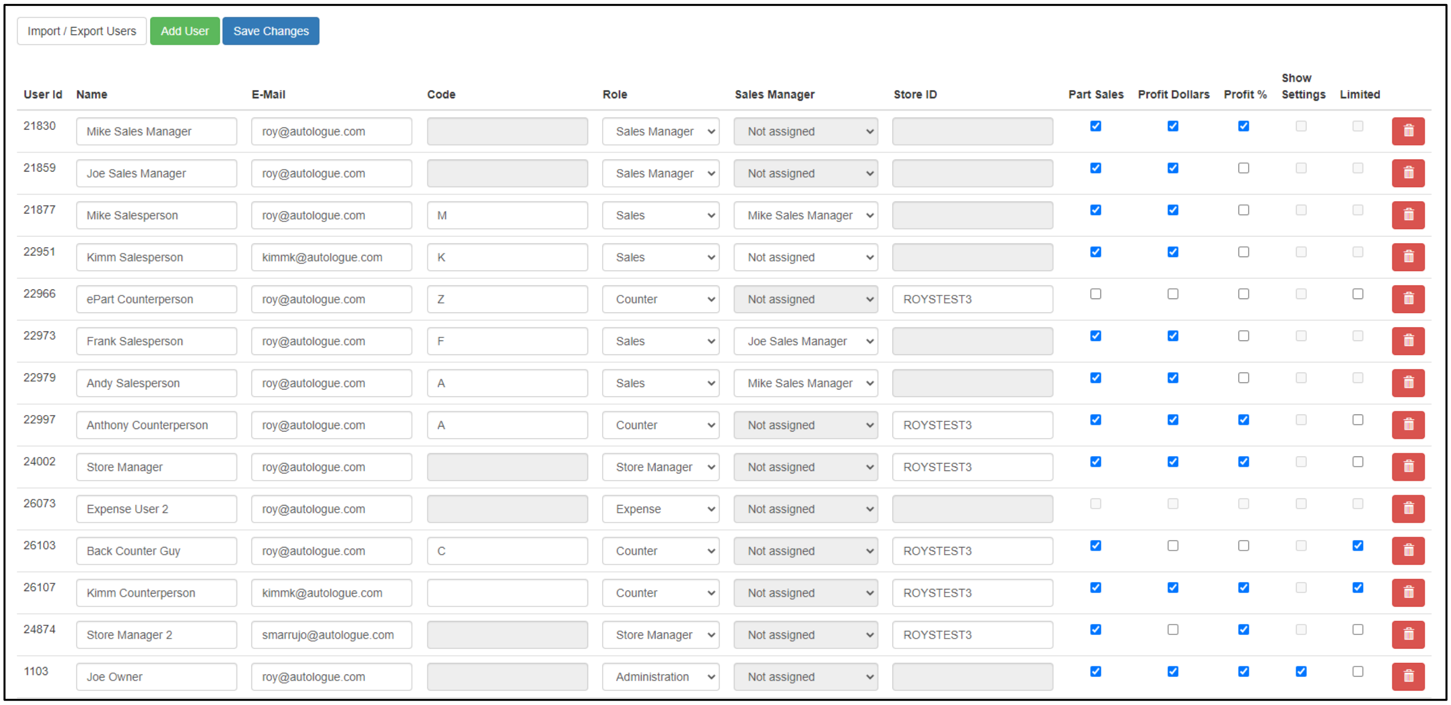
Before the eSales BI/CRM can be used, management will need to perform a few steps within the ePartConnection setup website (http://setup.epartconnection.com). Using your assigned Store ID and password, log into the ePartConnection setup website. The left-hand side of the screen will display a list of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



## 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:

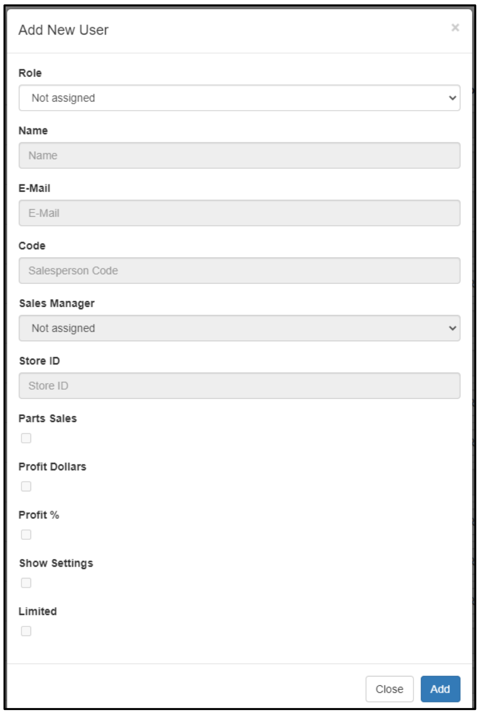


Import / Export Users | Add User | Save Changes

| 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 | | ☑ | ☑ | ☑ | ☐ | ☐ |
| 21859 | Joe Sales Manager | roy@autologue.com | | Sales Manager | Not assigned | | ☑ | ☑ | ☐ | ☐ | ☐ |
| 21877 | Mike Salesperson | roy@autologue.com | M | Sales | Mike Sales Manager | | ☑ | ☑ | ☐ | ☐ | ☐ |
| 22951 | Kimm Salesperson | kimmk@autologue.com | K | Sales | Not assigned | | ☑ | ☑ | ☐ | ☐ | ☐ |
| 22966 | ePart Counterperson | roy@autologue.com | Z | Counter | Not assigned | ROYSTEST3 | ☐ | ☐ | ☐ | ☐ | ☐ |
| 22973 | Frank Salesperson | roy@autologue.com | F | Sales | Joe Sales Manager | | ☑ | ☑ | ☐ | ☐ | ☐ |
| 22979 | Andy Salesperson | roy@autologue.com | A | Sales | Mike Sales Manager | | ☑ | ☑ | ☐ | ☐ | ☐ |
| 22997 | Anthony Counterperson | roy@autologue.com | A | Counter | Not assigned | ROYSTEST3 | ☑ | ☑ | ☑ | ☐ | ☐ |
| 24002 | Store Manager | roy@autologue.com | | Store Manager | Not assigned | ROYSTEST3 | ☑ | ☑ | ☑ | ☐ | ☐ |
| 26073 | Expense User 2 | roy@autologue.com | | Expense | Not assigned | | ☐ | ☐ | ☐ | ☐ | ☐ |
| 26103 | Back Counter Guy | roy@autologue.com | C | Counter | Not assigned | ROYSTEST3 | ☑ | ☐ | ☐ | ☐ | ☑ |
| 26107 | Kimm Counterperson | kimmk@autologue.com | | Counter | Not assigned | ROYSTEST3 | ☑ | ☑ | ☑ | ☐ | ☑ |
| 24874 | Store Manager 2 | smarrujo@autologue.com | | Store Manager | Not assigned | ROYSTEST3 | ☑ | ☐ | ☑ | ☐ | ☐ |
| 1103 | Joe Owner | roy@autologue.com | | Administration | Not assigned | | ☑ | ☑ | ☑ | ☑ | ☐ |

## Adding A User

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




- 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**

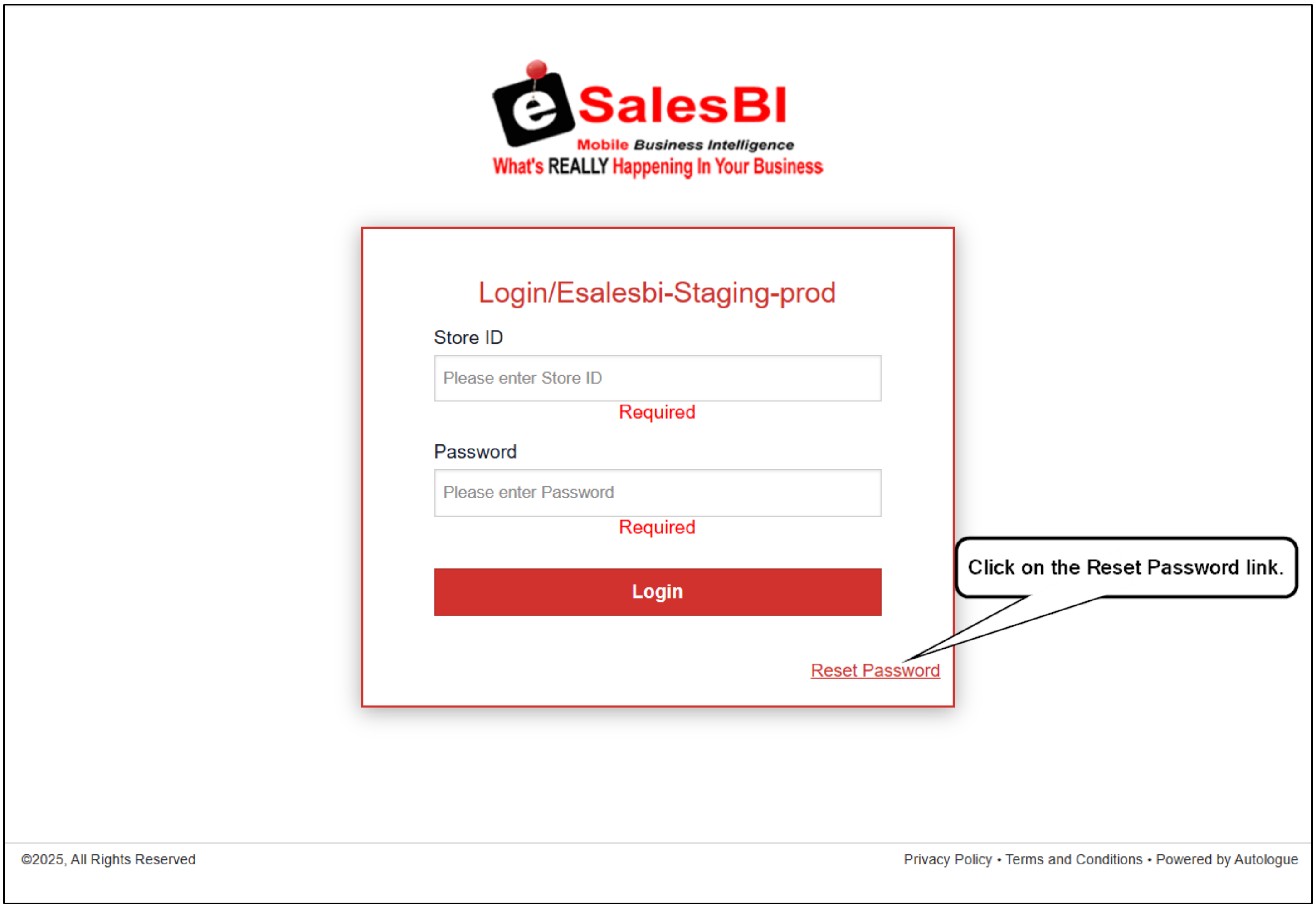
- For sales users, if they will be assigned to a Sales Manager, select the Sales Manager from the drop-down list.
- Enter a Store ID for Store Managers and Counter users.
- Checking "`Parts Sales`", "`Profit Dollars`" or "`Profit %`" will display those lines on the user's home screen. Unchecked, will 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

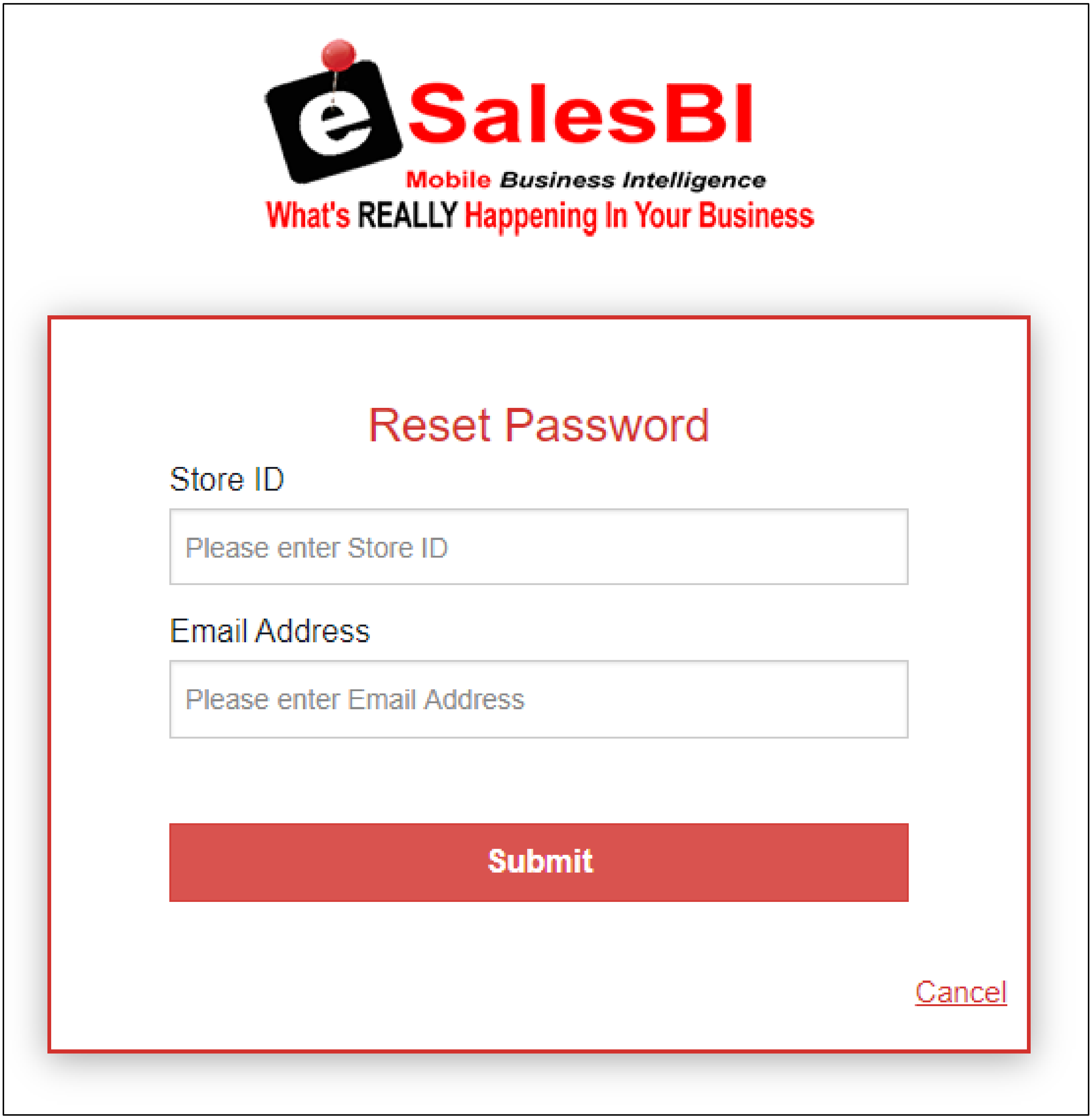
- Click the red trash can (🗑) icon to the far right of the user to delete.

## 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:

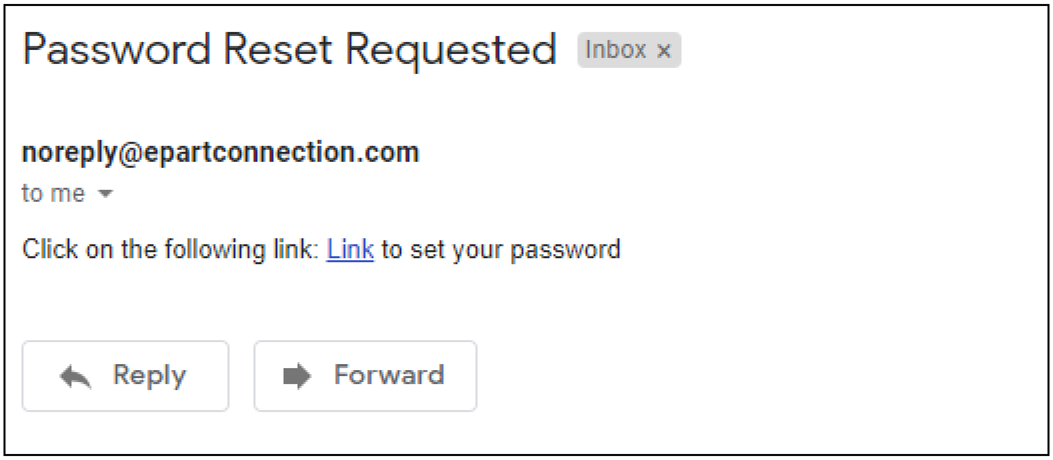


A *Reset Password* window will now be displayed as shown:

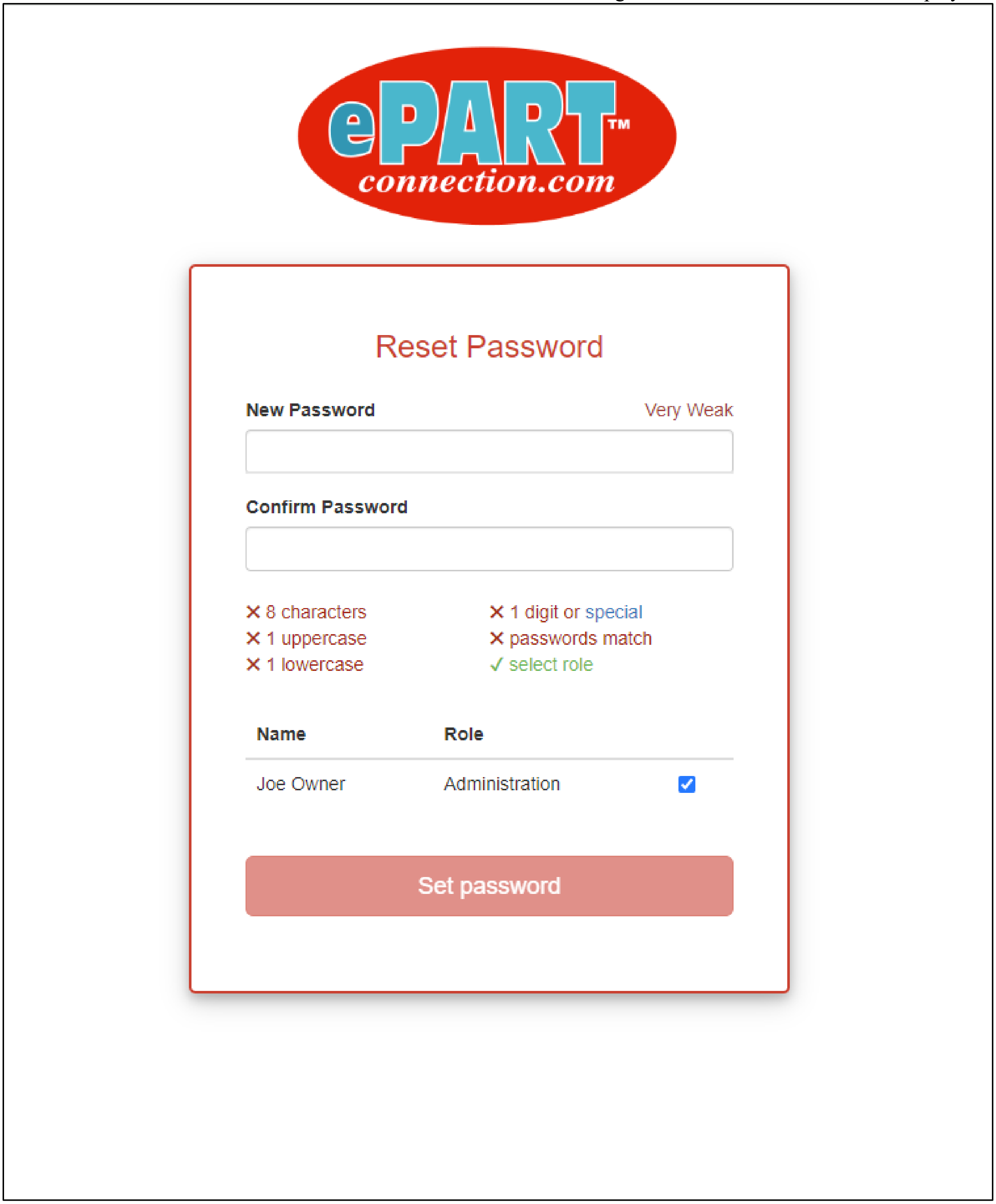



- The user would enter their Store ID and Email Address within their respective fields and then click on the red *Submit* button.

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:



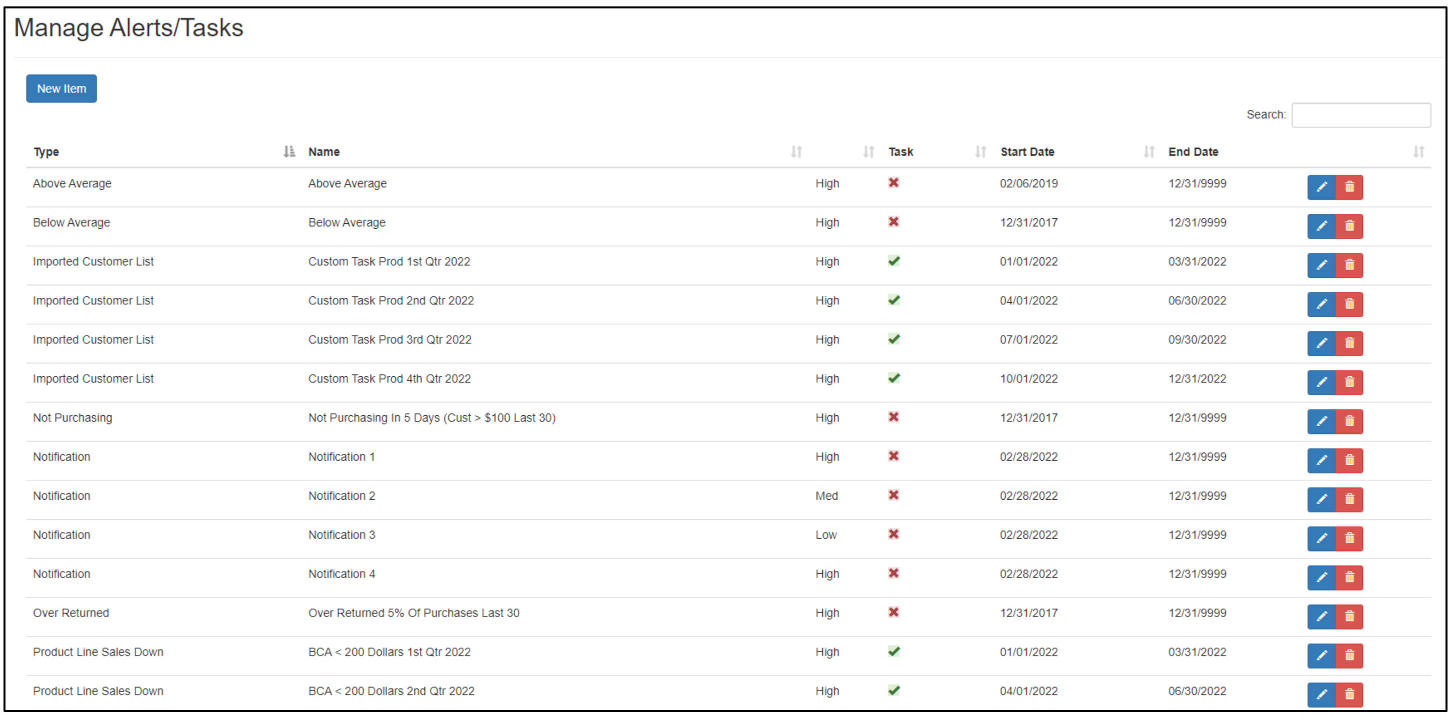
Below the password fields are *Name*, *Role* and check box fields that will be displayed for all the user roles associated with the users email address. By default, all their associated roles will be check marked. This means whatever password is entered, would apply to all the various roles check marked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

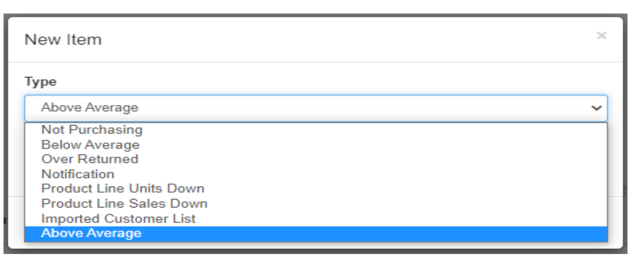

Manage Alerts/Tasks

New Item

Search:

| 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).

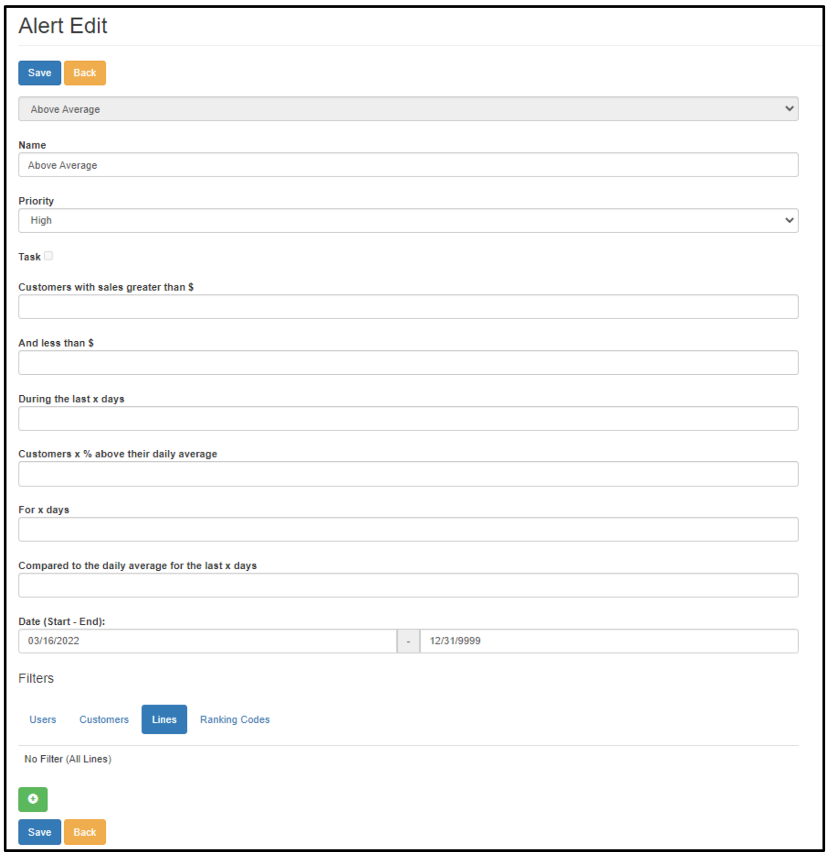



- If creating an alert, DO NOT check mark the Task box.

# 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.



## Criteria Fields & Descriptions

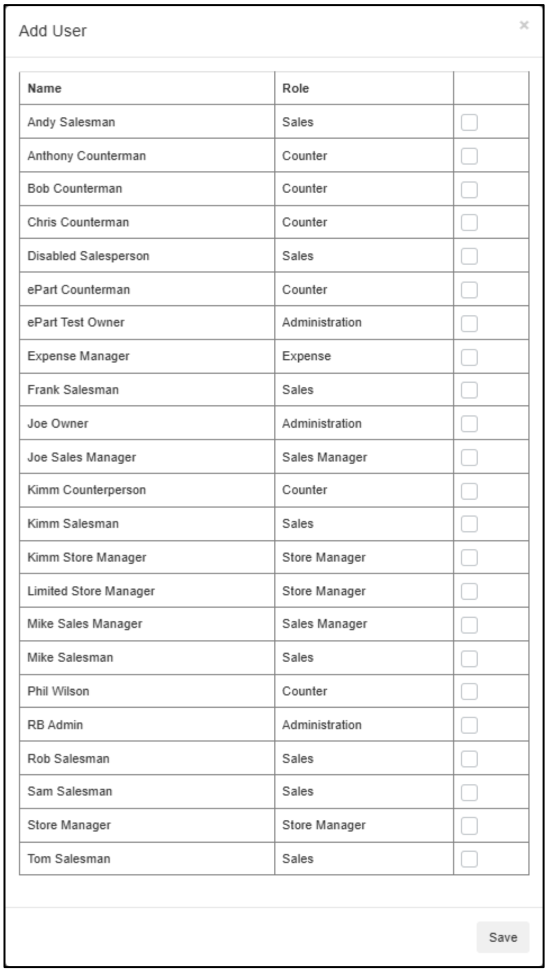
| Field Name | Description |
|---|---|
| Name | Name the alert |
| Priority | Select a priority (High, Med or Low). Defaults to High |
| Customers with sales greater than $ | Provide a value for the least a customer can purchase in the defined period to qualify for consideration |
| And less than $ | 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 | |
| Anthony Counterman | Counter | |
| Bob Counterman | Counter | |
| Chris Counterman | Counter | |
| Disabled Salesperson | Sales | |
| ePart Counterman | Counter | |
| ePart Test Owner | Administration | |
| Expense Manager | Expense | |
| Frank Salesman | Sales | |
| Joe Owner | Administration | |
| Joe Sales Manager | Sales Manager | |
| Kimm Counterperson | Counter | |
| Kimm Salesman | Sales | |
| Kimm Store Manager | Store Manager | |
| Limited Store Manager | Store Manager | |
| Mike Sales Manager | Sales Manager | |
| Mike Salesman | Sales | |
| Phil Wilson | Counter | |
| RB Admin | Administration | |
| Rob Salesman | Sales | |
| Sam Salesman | Sales | |
| Store Manager | Store Manager | |
| Tom Salesman | Sales | |

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.


## 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).


## 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).


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

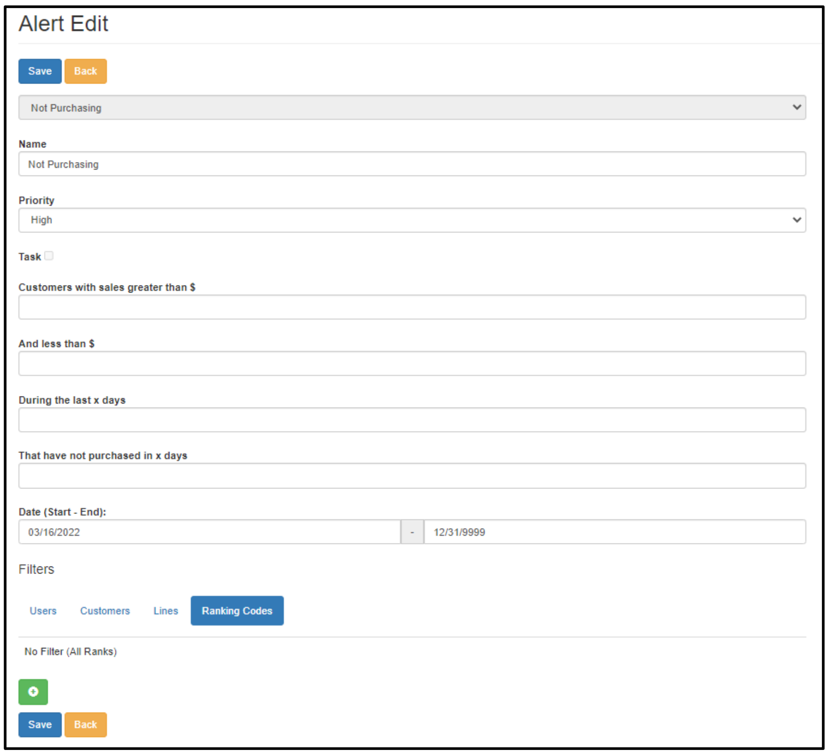
Another alert for ***Above Average*** can now be created using different criteria. Use the ***Name*** field to differentiate between the same types of alerts being viewed on the main screen.

## 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.




## 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 |

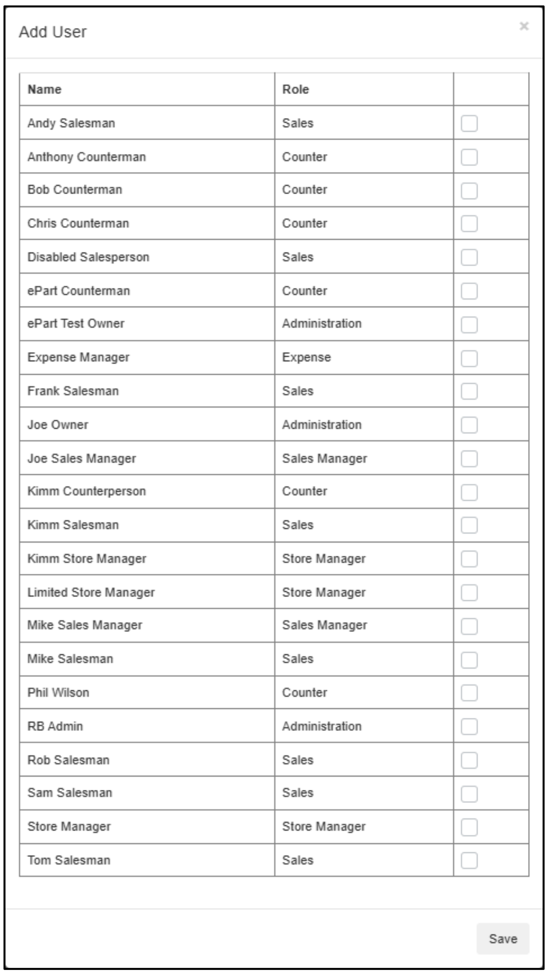
| | |
|---|---|
| Date (Start - End): | Provide start and end dates for the alert to show in Users' screens |

## 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 | |
| Anthony Counterman | Counter | |
| Bob Counterman | Counter | |
| Chris Counterman | Counter | |
| Disabled Salesperson | Sales | |
| ePart Counterman | Counter | |
| ePart Test Owner | Administration | |
| Expense Manager | Expense | |
| Frank Salesman | Sales | |
| Joe Owner | Administration | |
| Joe Sales Manager | Sales Manager | |
| Kimm Counterperson | Counter | |
| Kimm Salesman | Sales | |
| Kimm Store Manager | Store Manager | |
| Limited Store Manager | Store Manager | |
| Mike Sales Manager | Sales Manager | |
| Mike Salesman | Sales | |
| Phil Wilson | Counter | |
| RB Admin | Administration | |
| Rob Salesman | Sales | |
| Sam Salesman | Sales | |
| Store Manager | Store Manager | |
| Tom Salesman | Sales | |

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.


## 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).

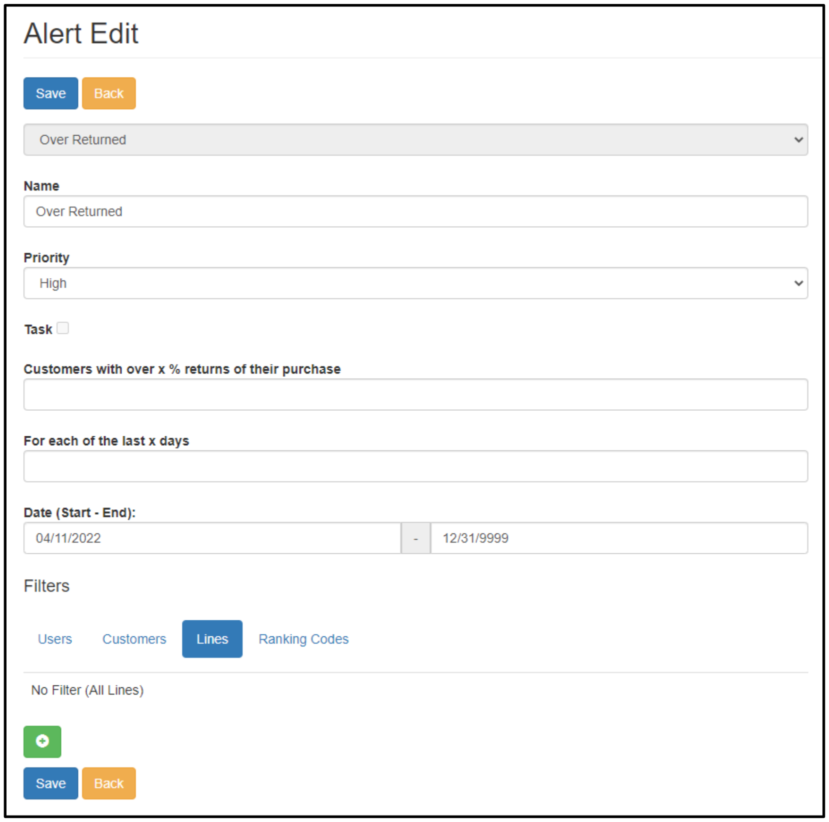

## Ranking Codes

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).


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




## Criteria Fields & Descriptions

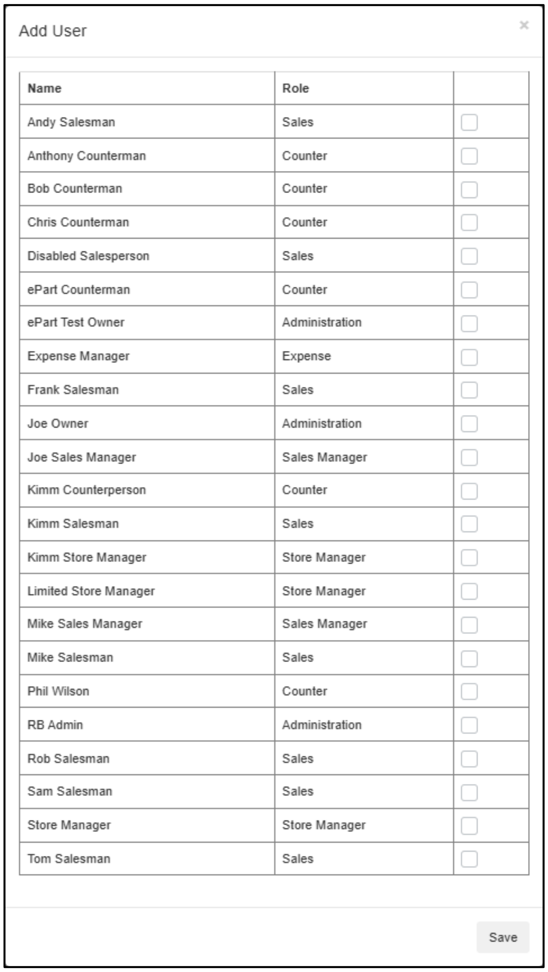
| Field Name | Description |
|---|---|
| Name | Name the alert. |
| Priority | Select a priority (High, Med or Low). Defaults to High. |
| Customers with over x% returns of their purchases | Provide a value for the percentage of returns versus their purchases that will qualify them for this alert. |
| 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 | |
| Anthony Counterman | Counter | |
| Bob Counterman | Counter | |
| Chris Counterman | Counter | |
| Disabled Salesperson | Sales | |
| ePart Counterman | Counter | |
| ePart Test Owner | Administration | |
| Expense Manager | Expense | |
| Frank Salesman | Sales | |
| Joe Owner | Administration | |
| Joe Sales Manager | Sales Manager | |
| Kimm Counterperson | Counter | |
| Kimm Salesman | Sales | |
| Kimm Store Manager | Store Manager | |
| Limited Store Manager | Store Manager | |
| Mike Sales Manager | Sales Manager | |
| Mike Salesman | Sales | |
| Phil Wilson | Counter | |
| RB Admin | Administration | |
| Rob Salesman | Sales | |
| Sam Salesman | Sales | |
| Store Manager | Store Manager | |
| Tom Salesman | Sales | |

Save

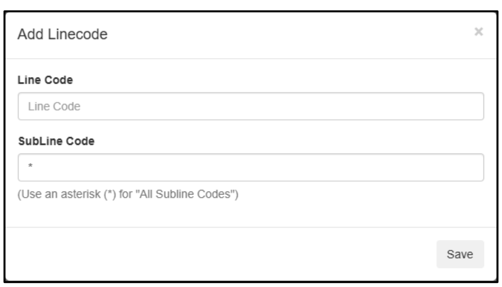
Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.

## 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.


## 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).



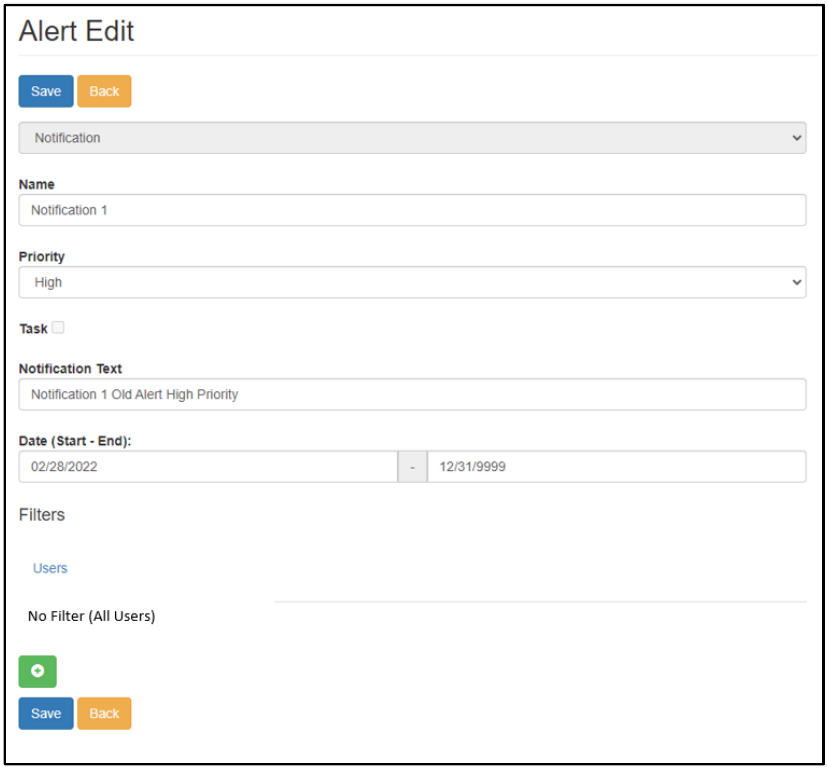

## Ranking Codes

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).


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.




## Criteria Fields & Descriptions

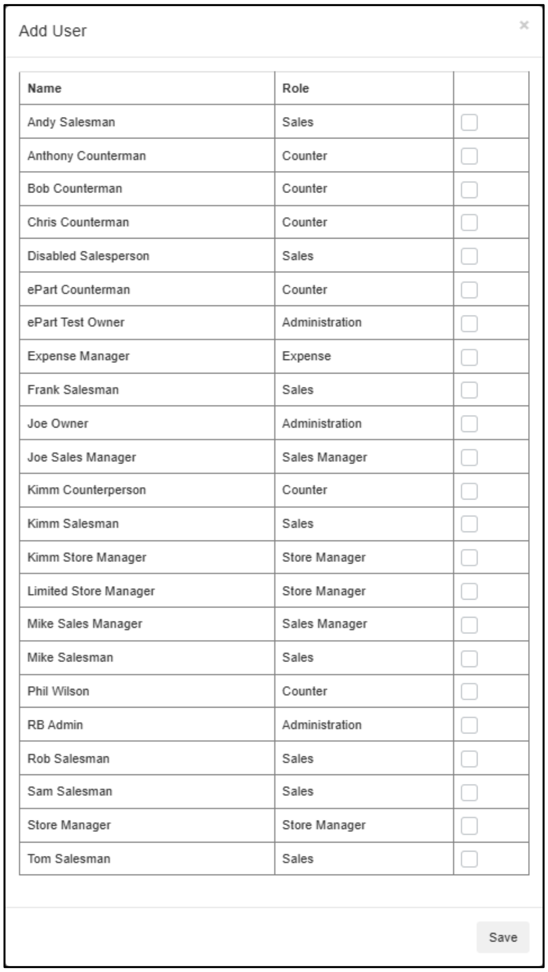
| Field Name | Description |
|---|---|
| Name | Name the notification |
| Priority | Select a priority (High, Med or Low). Defaults to High |
| Notification Text | Enter the text to be displayed for users |
| Date (Start - End): | Provide start and end dates for the notification to show in Users' screens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

## 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 | ☐ |
| Anthony Counterman | Counter | ☐ |
| Bob Counterman | Counter | ☐ |
| Chris Counterman | Counter | ☐ |
| Disabled Salesperson | Sales | ☐ |
| ePart Counterman | Counter | ☐ |
| ePart Test Owner | Administration | ☐ |
| Expense Manager | Expense | ☐ |
| Frank Salesman | Sales | ☐ |
| Joe Owner | Administration | ☐ |
| Joe Sales Manager | Sales Manager | ☐ |
| Kimm Counterperson | Counter | ☐ |
| Kimm Salesman | Sales | ☐ |
| Kimm Store Manager | Store Manager | ☐ |
| Limited Store Manager | Store Manager | ☐ |
| Mike Sales Manager | Sales Manager | ☐ |
| Mike Salesman | Sales | ☐ |
| Phil Wilson | Counter | ☐ |
| RB Admin | Administration | ☐ |
| Rob Salesman | Sales | ☐ |
| Sam Salesman | Sales | ☐ |
| Store Manager | Store Manager | ☐ |
| Tom Salesman | Sales | ☐ |

Save

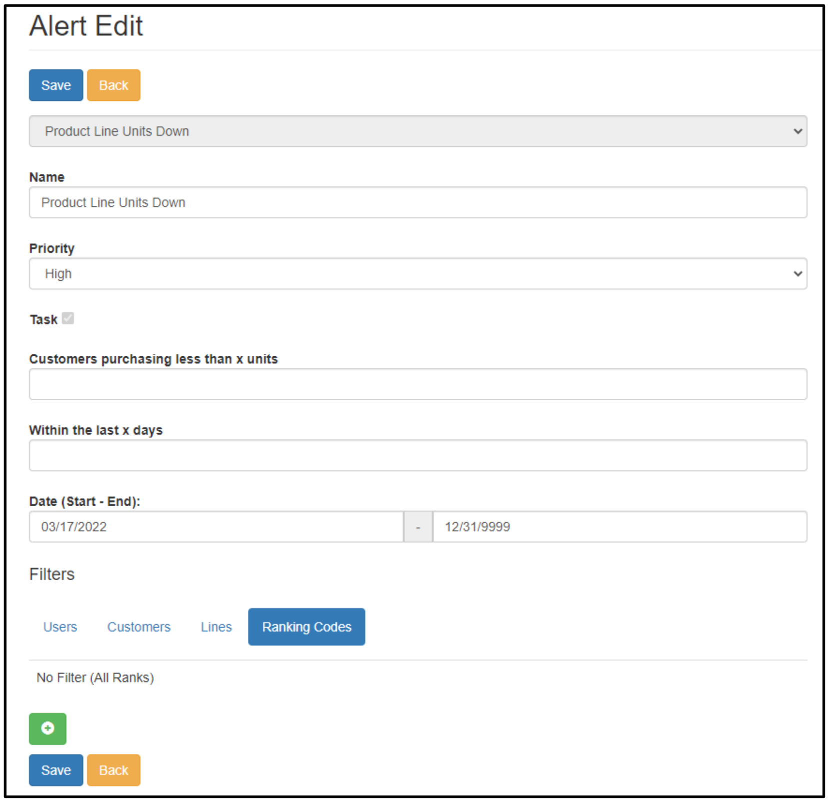
Check mark the specific users that are allowed to see results of this alert and then click on the grey *Save* button.

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.




## 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 | ☐ |
| Anthony Counterman | Counter | ☐ |
| Bob Counterman | Counter | ☐ |
| Chris Counterman | Counter | ☐ |
| Disabled Salesperson | Sales | ☐ |
| ePart Counterman | Counter | ☐ |
| ePart Test Owner | Administration | ☐ |
| Expense Manager | Expense | ☐ |
| Frank Salesman | Sales | ☐ |
| Joe Owner | Administration | ☐ |
| Joe Sales Manager | Sales Manager | ☐ |
| Kimm Counterperson | Counter | ☐ |
| Kimm Salesman | Sales | ☐ |
| Kimm Store Manager | Store Manager | ☐ |
| Limited Store Manager | Store Manager | ☐ |
| Mike Sales Manager | Sales Manager | ☐ |
| Mike Salesman | Sales | ☐ |
| Phil Wilson | Counter | ☐ |
| RB Admin | Administration | ☐ |
| Rob Salesman | Sales | ☐ |
| Sam Salesman | Sales | ☐ |
| Store Manager | Store Manager | ☐ |
| Tom Salesman | Sales | ☐ |

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.


## 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).


## 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).


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

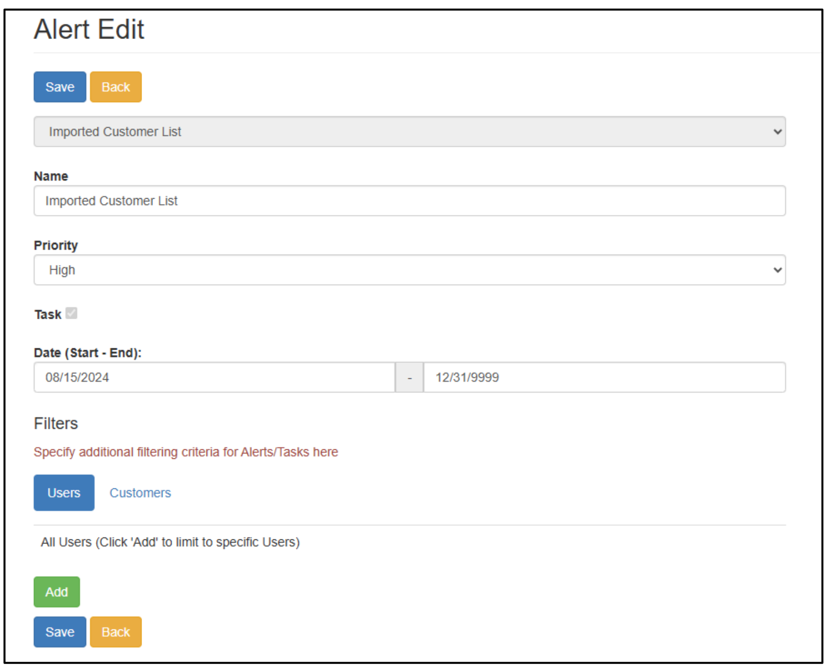
To create a ***Product Line Sales Down*** task, after selecting that type and clicking on the *Save* button, the user will be directed to the *Alert Edit* screen to enter criteria. This is the same as the ***Product Line Units Down*** setup, with the exception it shows customers ***Below*** the specified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

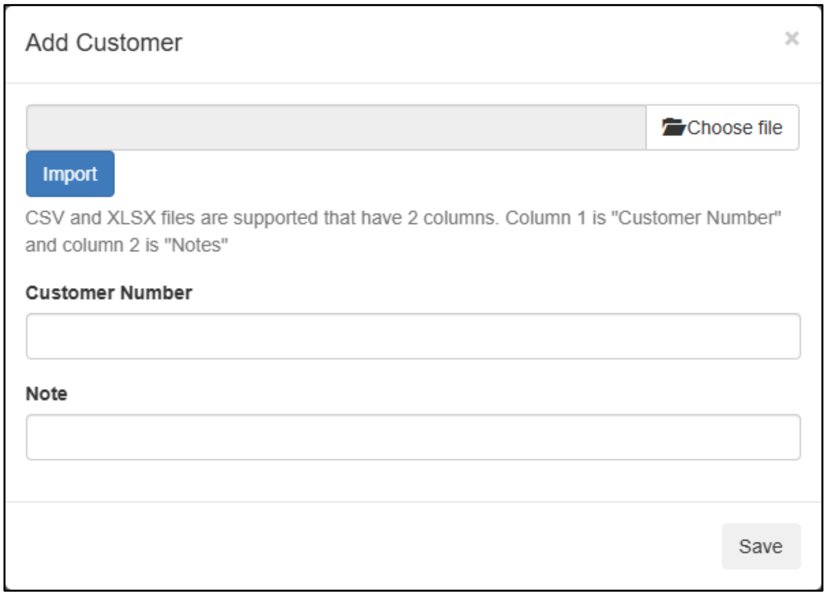
## Imported Customer List

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



## Customers

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




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.

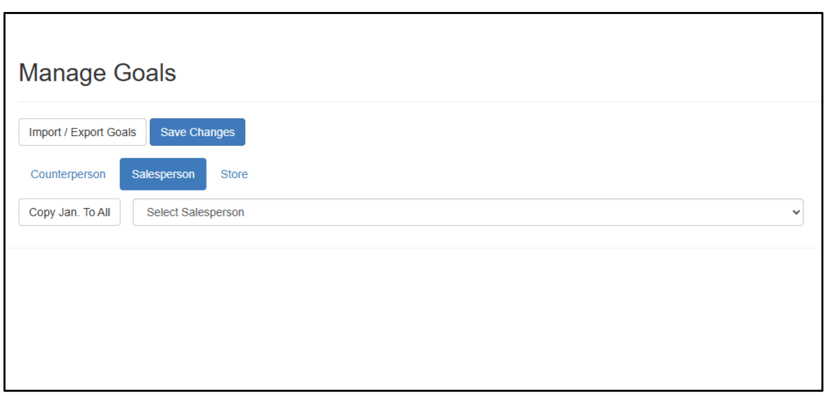
In all Alert and Task types, clicking on the gold *Back* button will close that screen without saving anything.

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 counterpersons, 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:



## 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.

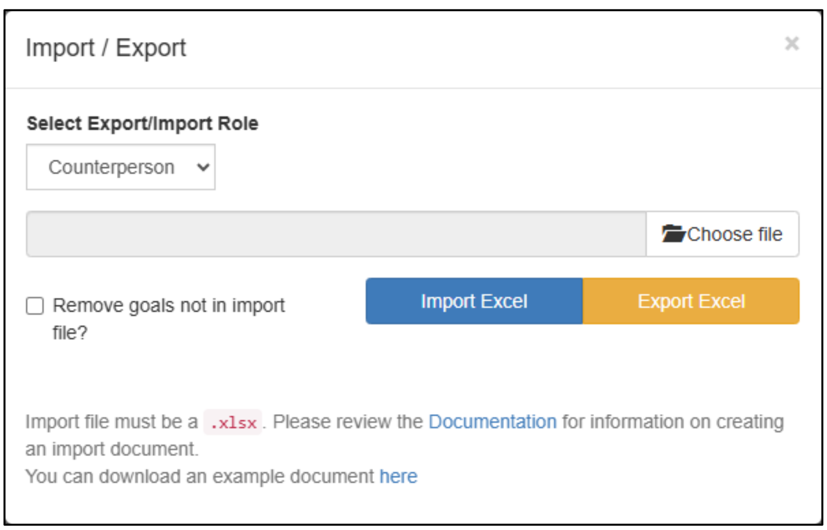
☞ **Optionally, you can click on the `Copy Jan. To All` button to copy the January entered goals into all the months.**

## Editting 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:

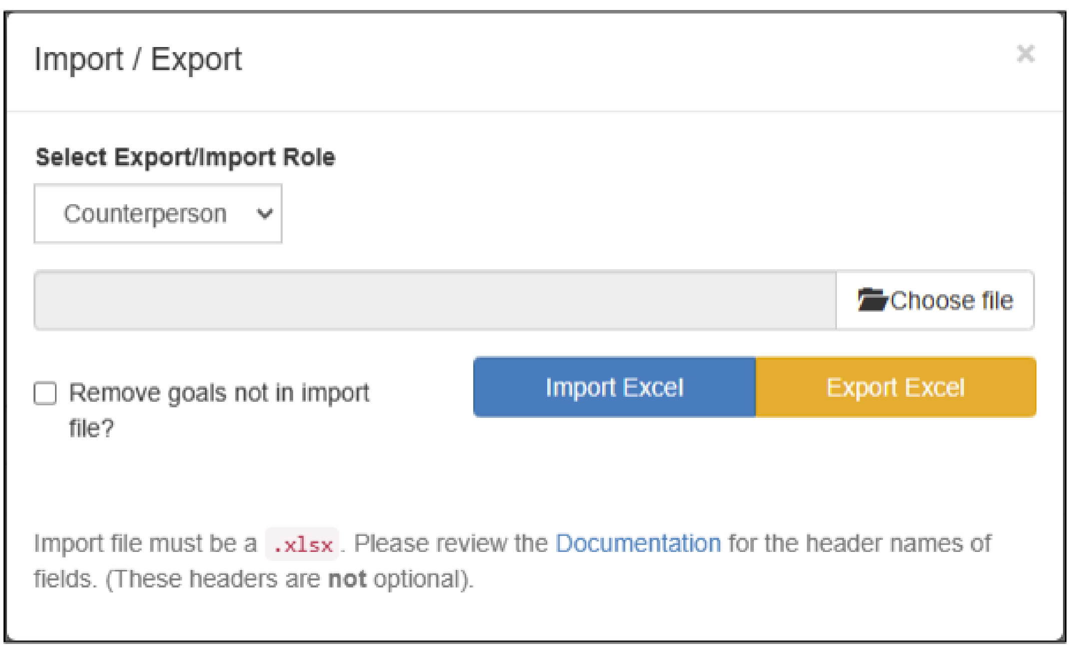


To view detailed instructions on how to import/export goals, clicking on the blue `Documentation` link and a new tab window will open and display the instruction information as shown:

## 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:

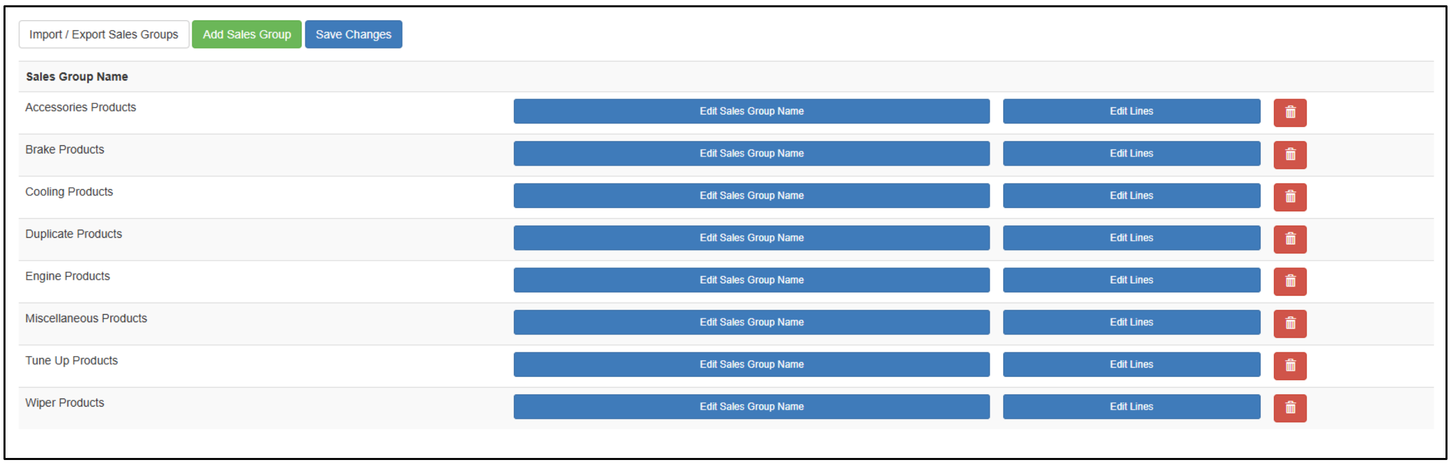



The exporting and importing of goals information for stores, salespersons and counterpersons are performed through single Excel spreadsheets. When wanting to import goals for your stores, By clicking on the blue `here` text link, a template spreadsheet file will be downloaded. It contains a separate 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

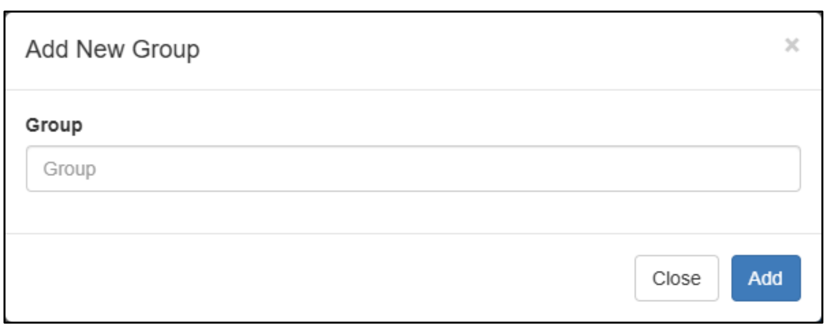
Management can setup specific sales groups to include specific manufacturer product lines/sublines to display sales data for by counterpersons, salespersons and also for administrators.

- Click on the `Sales Groups` menu link and the following screen will be displayed:




## 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:




- 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.

## Editting A Sales Group Name

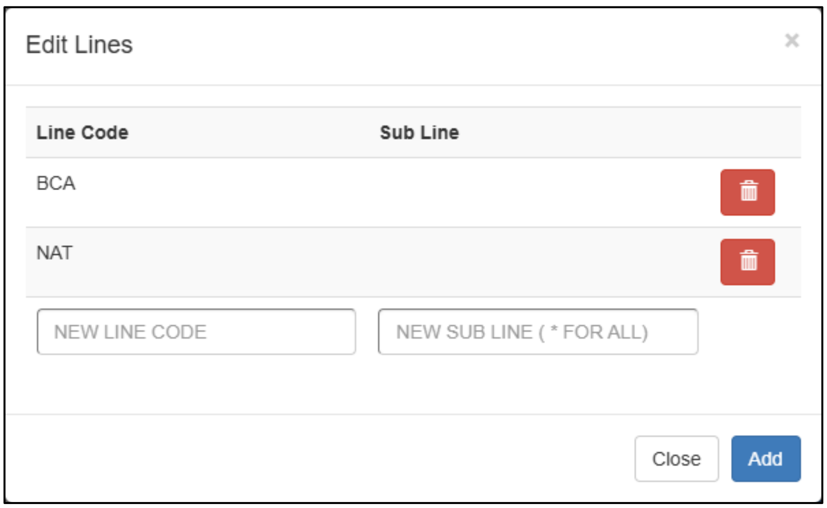
- To edit an existing sales group name entry, click on the blue `Edit Sale Group Name` button to the right of the sales group description. Click within the *Group* field, enter the desired changes and then click on the blue `Update` button. Click on the blue `Save Changes` button at the top of the page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




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 | http://www.monroe.com/en-US/events/ | Up | Down | Edit | Delete |
| Moog problem solver bulletins library | http://www.moogproblemsolver.com/category/problem- | Up | Down | Edit | Delete |
| Get your online ePricing here | http://www.autologue.com/acscart/subscriberlogin.a | Up | Down | Edit | Delete |
| Manage Opportunities Production | https://abtrainingacademy.com | Up | Down | Edit | Delete |
| | | Add | | | |
| Save Links | | | | | |

## 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.

## Editting 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.