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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 counterman. Sales dashboards for customers by salesperson as well as by counterman 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.

Store Manager Login Screen

When a Store Manager has logged in using their store manager password, the following screen will be displayed:

This is the store manager user's home screen. At the top of the page is a table grid with the sales figures for the entire store including goals for Month to Date (MTD Goal) and Year to Date (YTD Goal). The graphical bar code's view shows metrics for the selected counter user. Within the top section of the screen, the store manager can view the following for the selected counter user:

- View a graphical sales dashboard of his performance against monthly & yearly sales goals, and their *Award* table information (if setup). *Awards* (`Award $$`) are calculated on the `Difference` between `Actual Sales` and `Goal` dollar amounts, then multiplied by the `% Award` (when dollar amount is positive).

The store manager has access to a table grid view of their goals, as well as several tiles:

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	$466.00	$1050.00	-55.62%	$1157.14	40.27%	100.00%	$666.00	$1415.00	-52.93%	$2335.89	28.51%	74.28%

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%	61.88%	57.39%	7.82%	39.00%	158.67%	100.00%	62.86%	61.10%	2.88%	46.58%	134.95%	77.87%

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	$288.38	$602.55	-52.14%	$578.57	49.84%	100.00%	$418.64	$864.59	-51.58%	$1167.95	35.84%	77.87%

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	8	5	60.00%	19.00	41.47%	100.00%	10	16	-37.50%	45.00	22.17%	76.92%

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	2.00	2.40	-16.67%	2.00	100.00%	100.00%	1.90	1.88	1.06%	2.25	84.44%	102.70%

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%	9.52%	-100.00%	2.00%	0.00%	0.00%	0.00%	29.68%	-100.00%	2.33%	0.00%	0.00%

From the store manager's home screen, they can perform the following:

• Alerts & Notifications – View a summary of all alerts & notifications for the customers within the store.	• Schedule – View a specific users scheduled calls/visits on the calendar by date selection.
• Customer List – Display a list of all customers or by specific salesperson.	• Search Notes – Search notes by user and/or date range. Optionally display in detail view and filter by tasks only.
• Sales & Profit – See sales totals by store, salesperson, and counterperson.	• Reports – View store specific reports (i.e. Win The Day Dashboard, etc.).

Sales Dashboard

Outlined below are the different sections of the store manager'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 *Awards* table that contains the actual sales amount, goal amount, the difference (goal – actual), award percentage and the award dollar amount earned when the sales goal has been met.

☞ **Note: The award table only displays when setup.**

Month To Date Goals

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

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

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
- New Return %
- Gross Margin %
- Number of Invoices
- New Return Dollars

Sales Metrics Grid View

Sales Dollars Row

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 % Row

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 Row

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 Row

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 Row

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 Dollars Row

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

New Return % Row

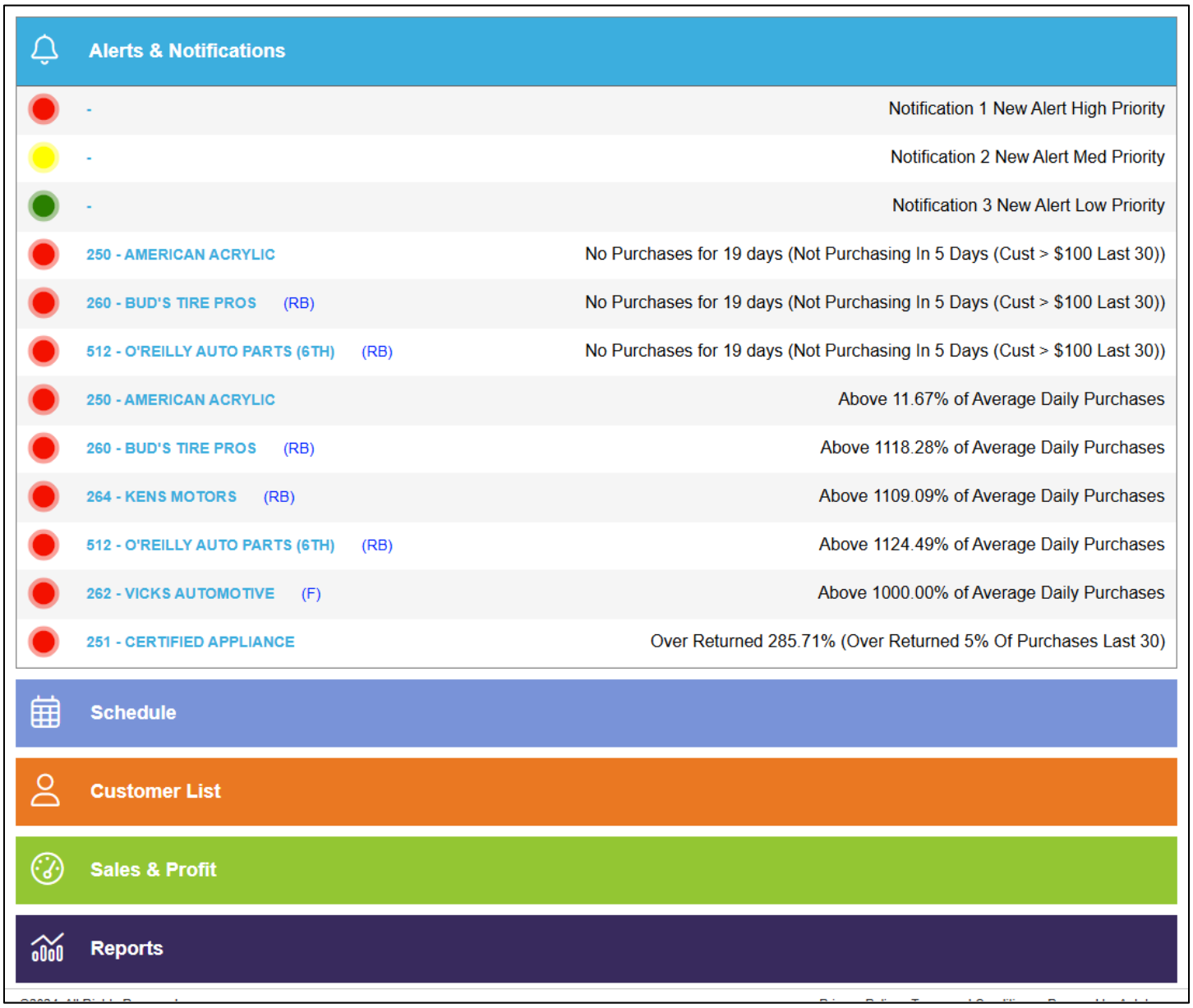
Heading	Description
Prev Day	Shows the Previous Day's percentage of returns against Sales
MTD	Shows the Month To Date (MTD) percent returns. Denoted by the right hand bar within the Goals MTD screen section.
LY MTD	Shows Last Years (LY) Month To Date (MTD) percent returns.
% Change	Shows the percentage 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 counterperson.
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

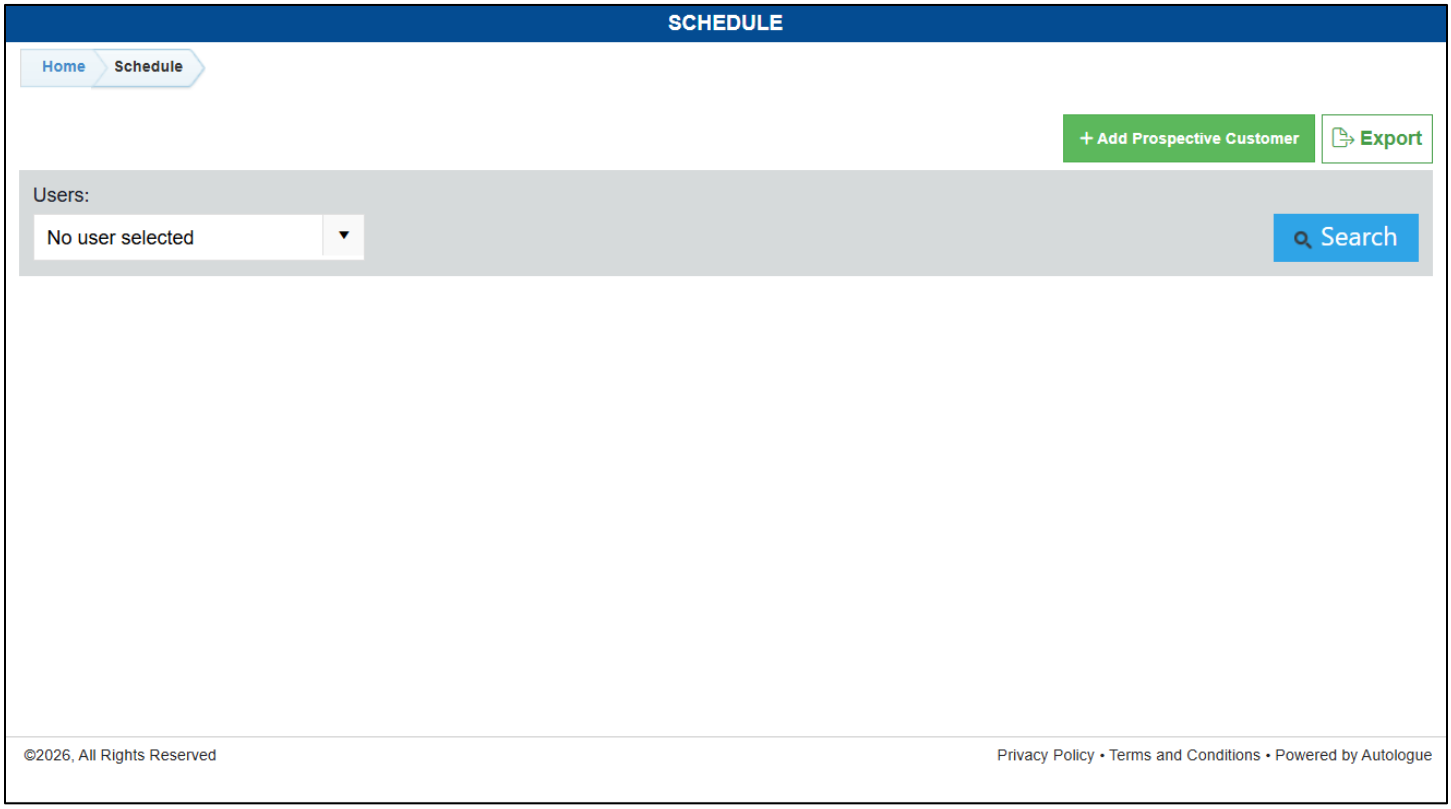
From the user's home screen, if any alerts or notification has been setup and/or met, they will be displayed below the `Alerts & Notifications` heading section when the tile is clicked on as shown:



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 schedule, click on the `Schedule` menu tile.



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

Clicking on the `+Add Prospective Customers` button will allow the user to add a prospective customer and assign to a user.

Clicking on the `Export` button will allow the user to export schedules for a selected user to an Excel spreadsheet, iCal formatted file, or feed to be imported into your calendar.

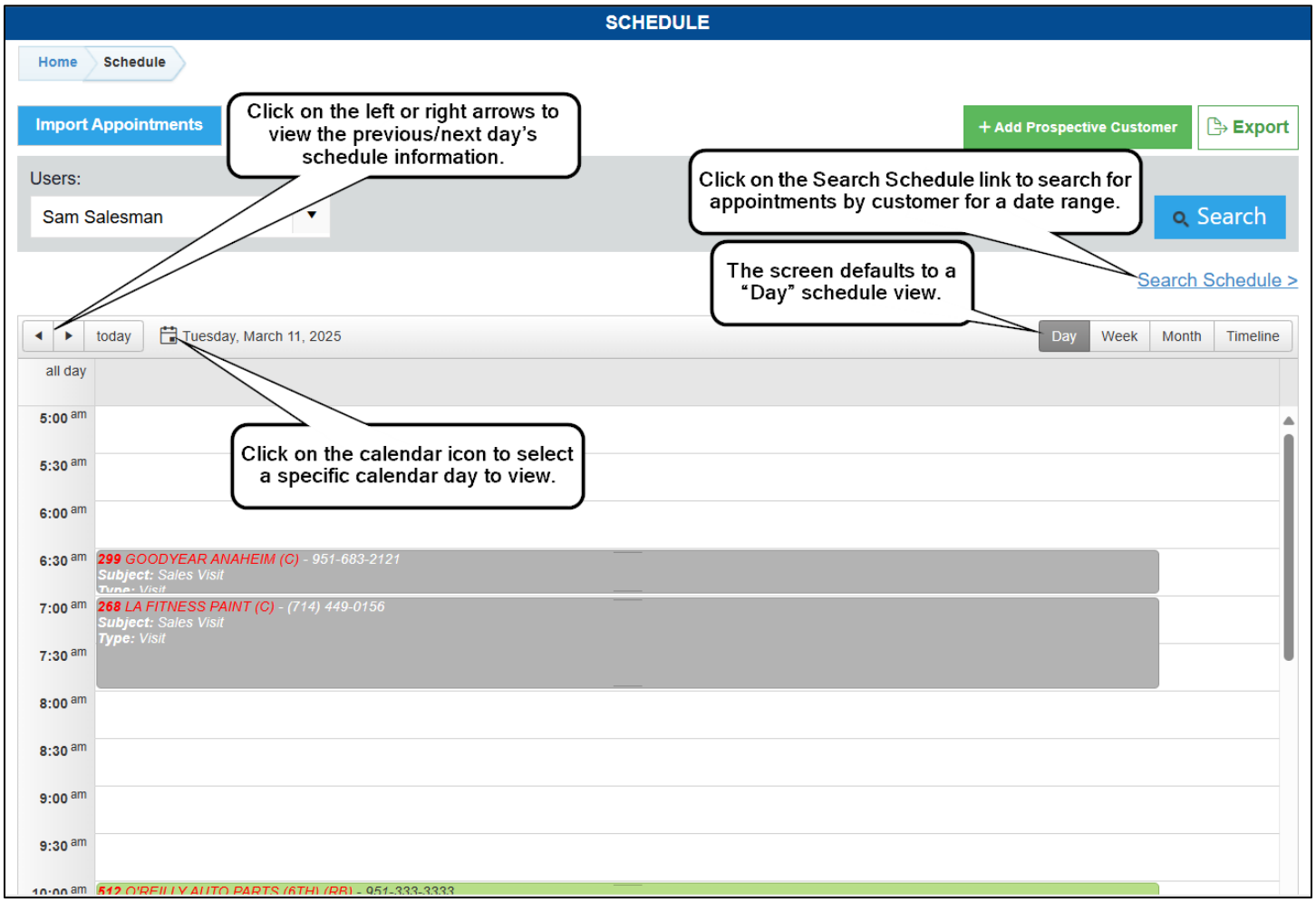
☞ ****NOTE** The Store Manager user can only <u>view</u> other Store Managers & Sales users' schedules, they may not add or change their appointments.**

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

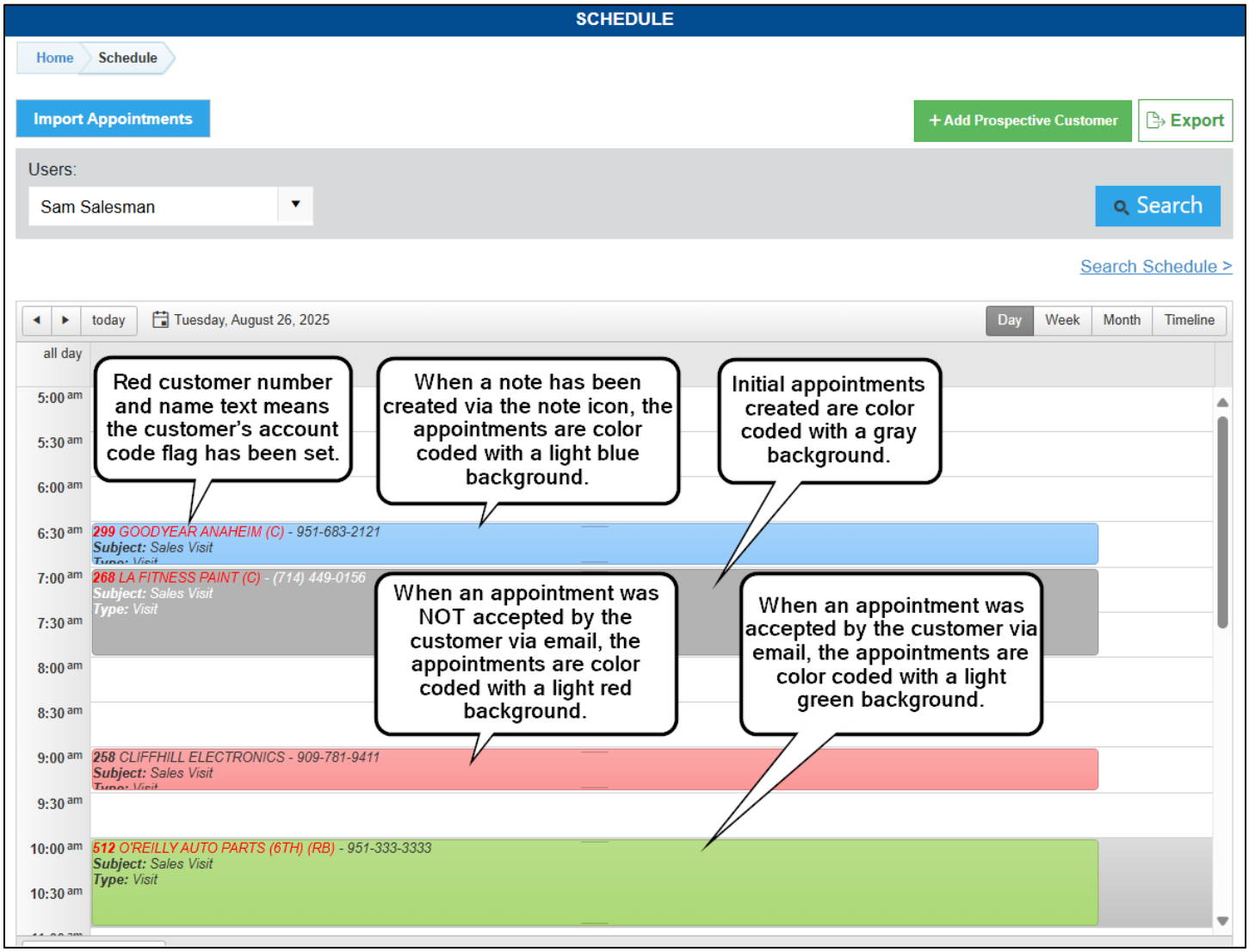
By default, the screen will display a daily schedule view as shown:



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. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*), iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*), or feed.

Appointment Background Colors



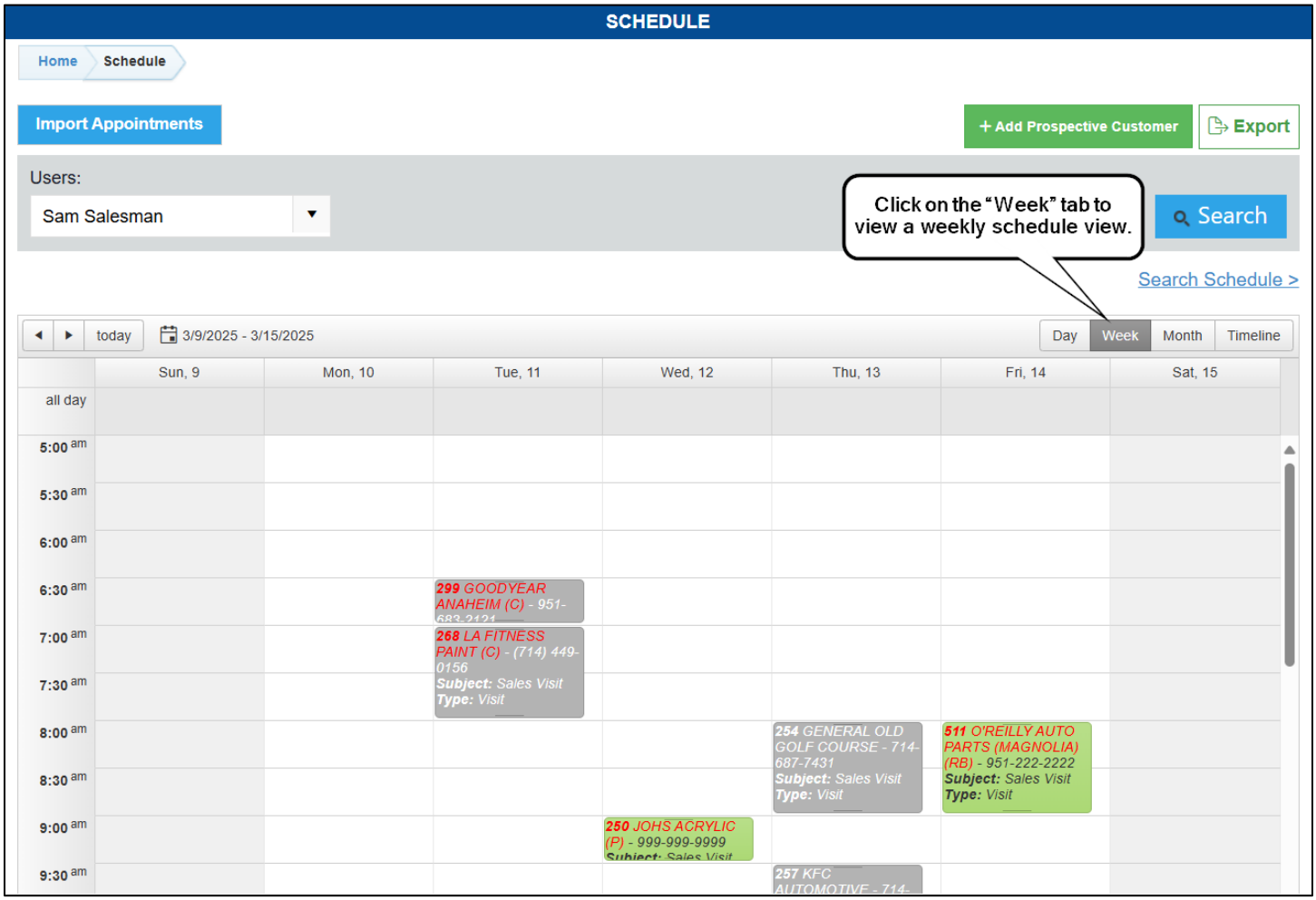
Background Color	Description
Light Gray	When appointments are initially created, it will have a light gray background.
Light Blue	When a note has been created via the note icon displayed within the appointment pop-up window, the appointments will have a light blue background.
Light Red	When an appointment 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:



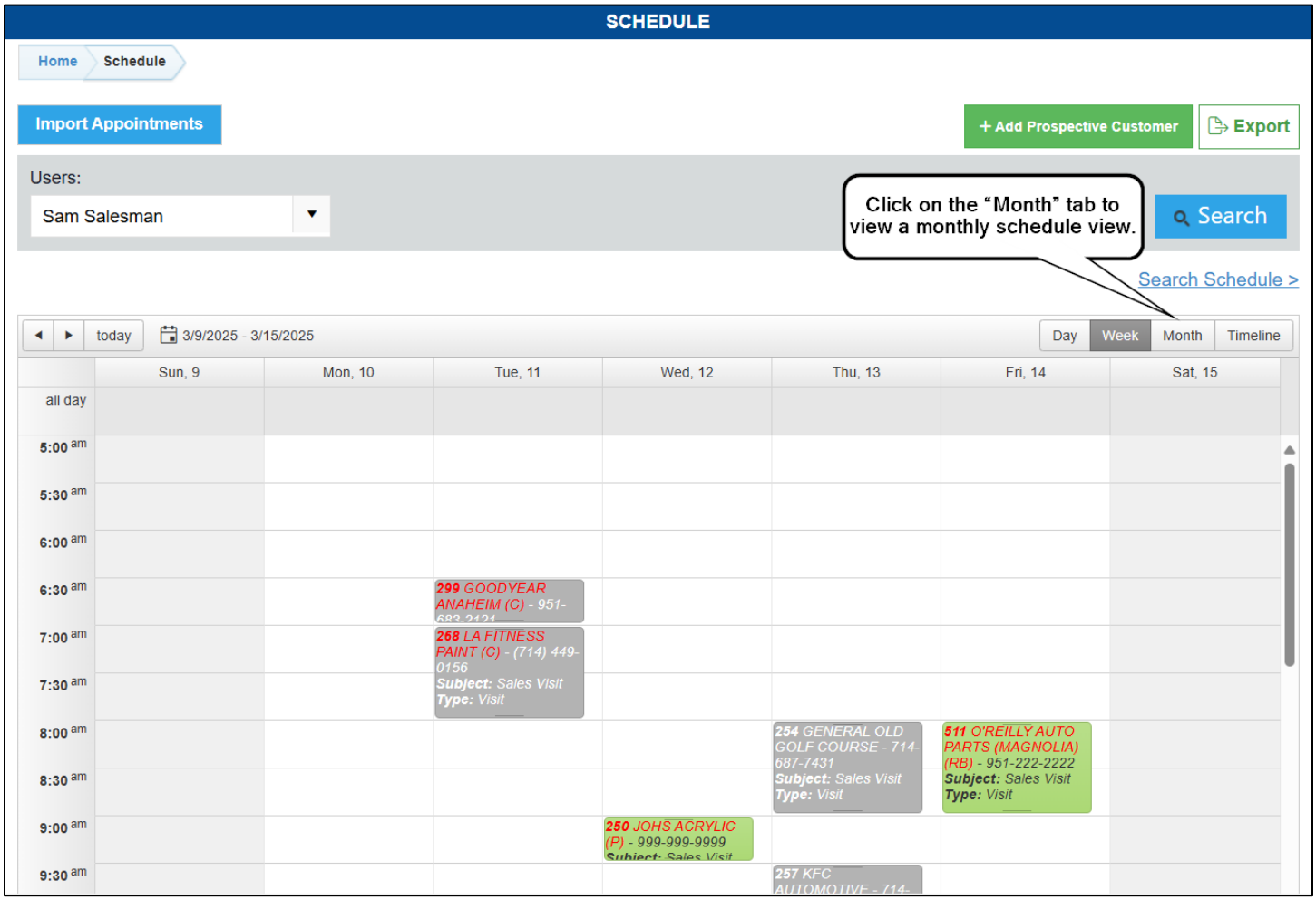
The weekly schedule view shows all appointments only for the current week.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next week's schedule information. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*), iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*), or feed.

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:



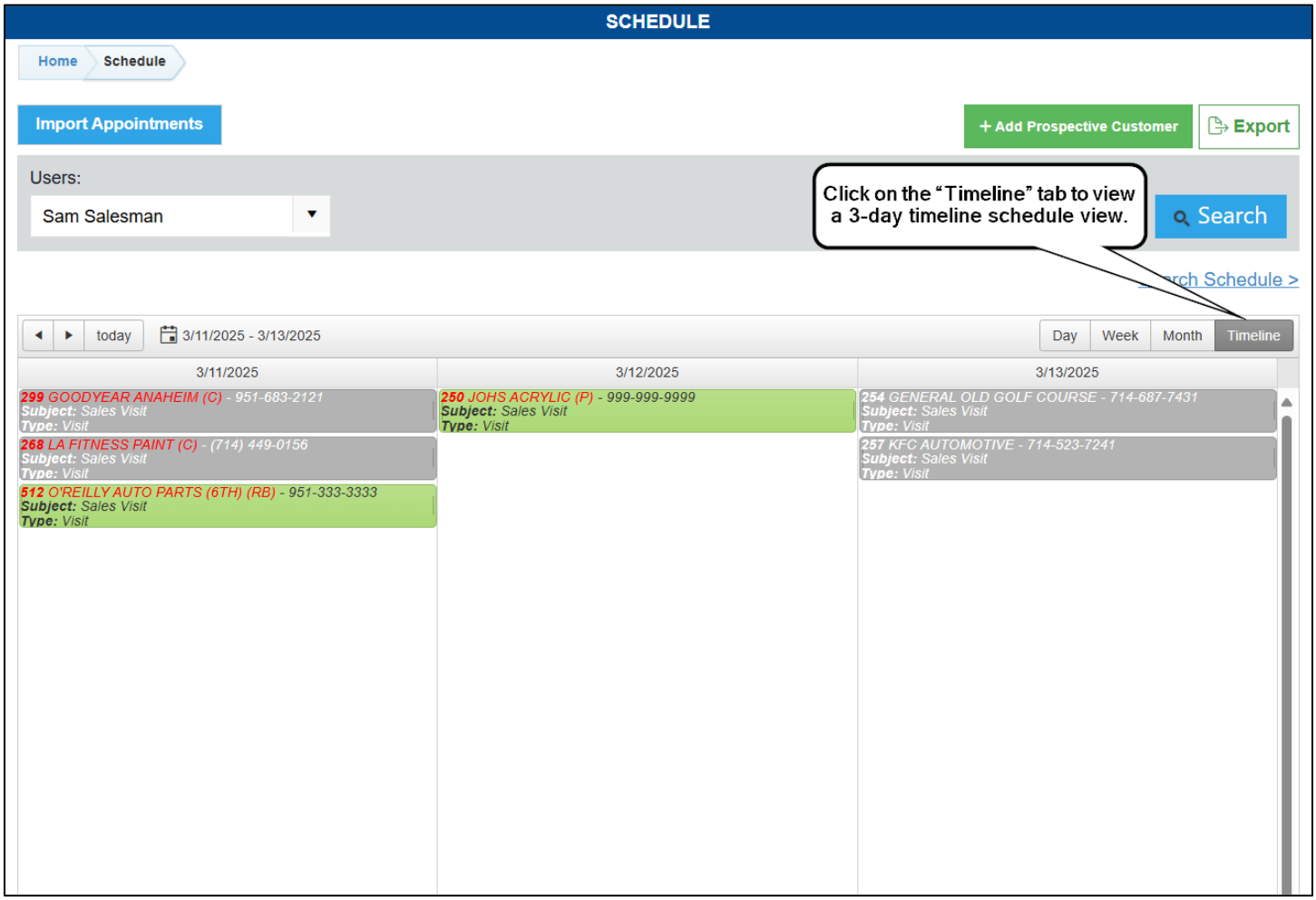
The monthly schedule view shows all appointments only for the current month.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next month's schedule information. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*), iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*), or feed.

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:



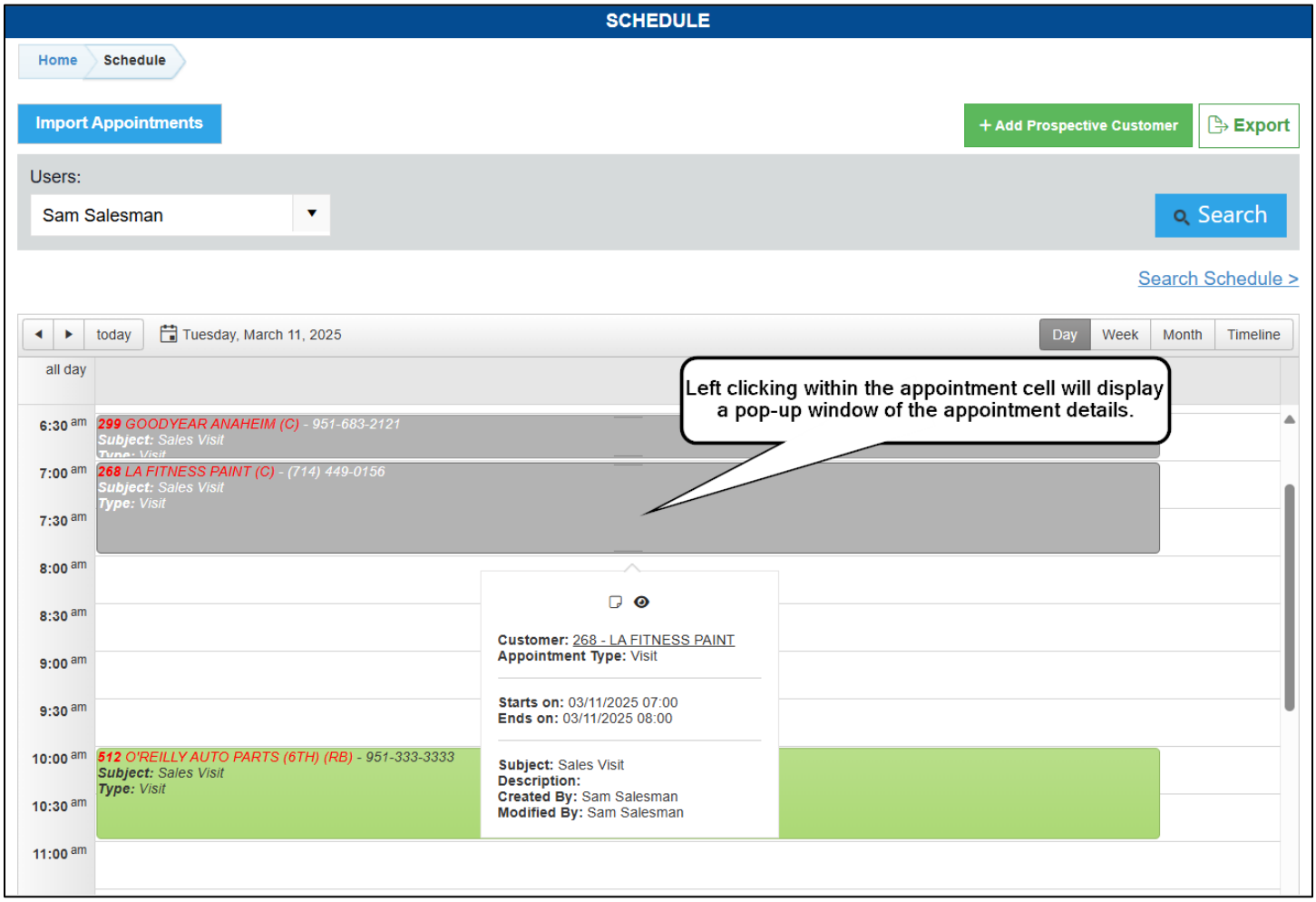
The timeline schedule view shows all appointments only for a 3-day period.

- Click on the left or right arrow buttons of the grey heading bar to view the previous or next day's schedule information. Click on the `Search Schedule>` link to search for appointments by customer for a date range. Click on the `+Add Prospective Customer` button to a new prospective customer. Click on the `Export` button to save the appointments information to an Excel spreadsheet (*.xlsx/.xls*), iCal (*.ical*) formatted file (*appointments_export.xls/xlsx/ical*), or feed.

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:

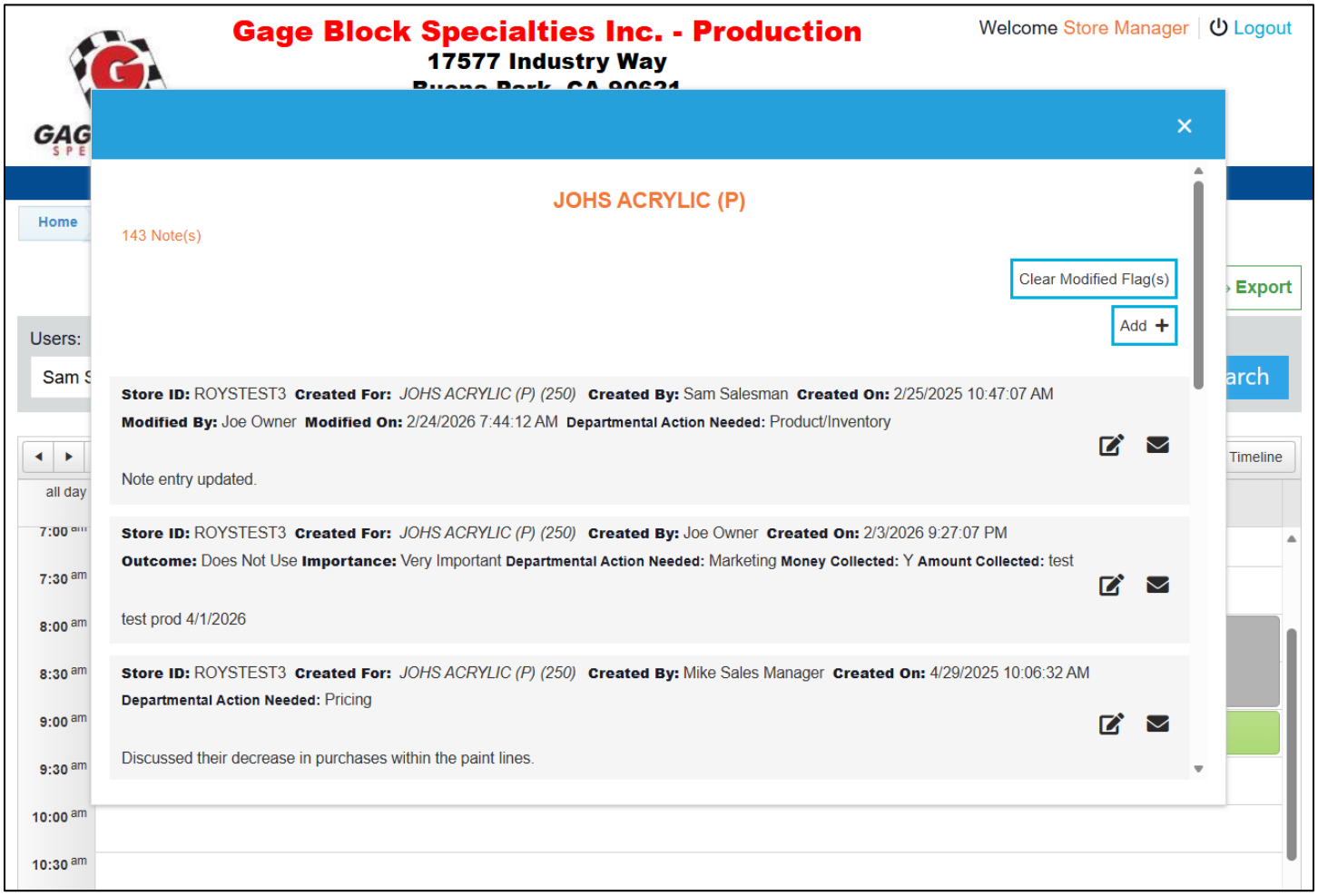


- To remove the appointment details pop-up window, click anywhere else on the screen.

Entering A Customer Note From An Appointment

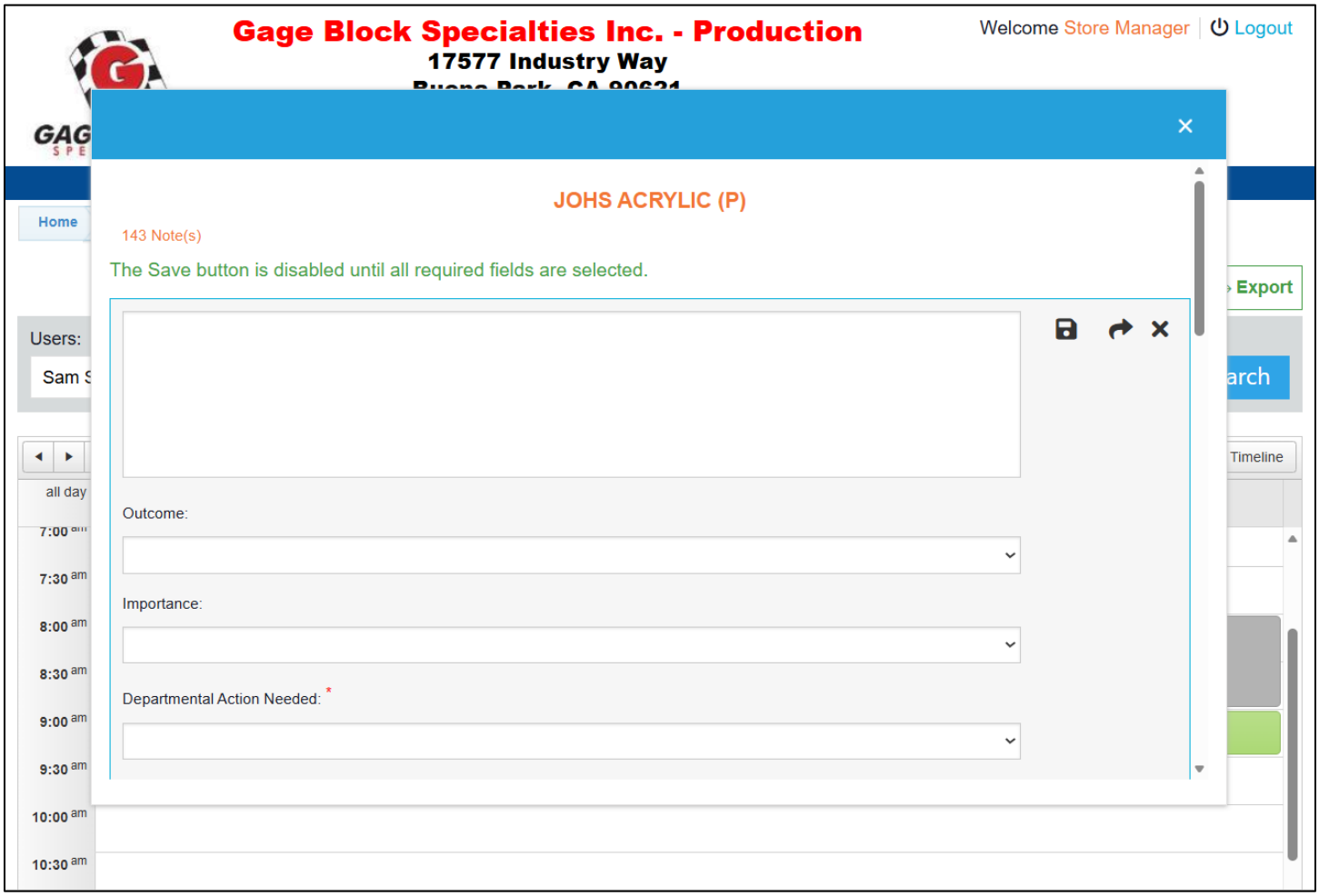
- With the schedule screen displaying appointments in the day view, left click within an appointment cell to view the appointment details (anywhere except the customer's name). You can enter a customer note by left clicking on the customer notes icon (🗋).

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.

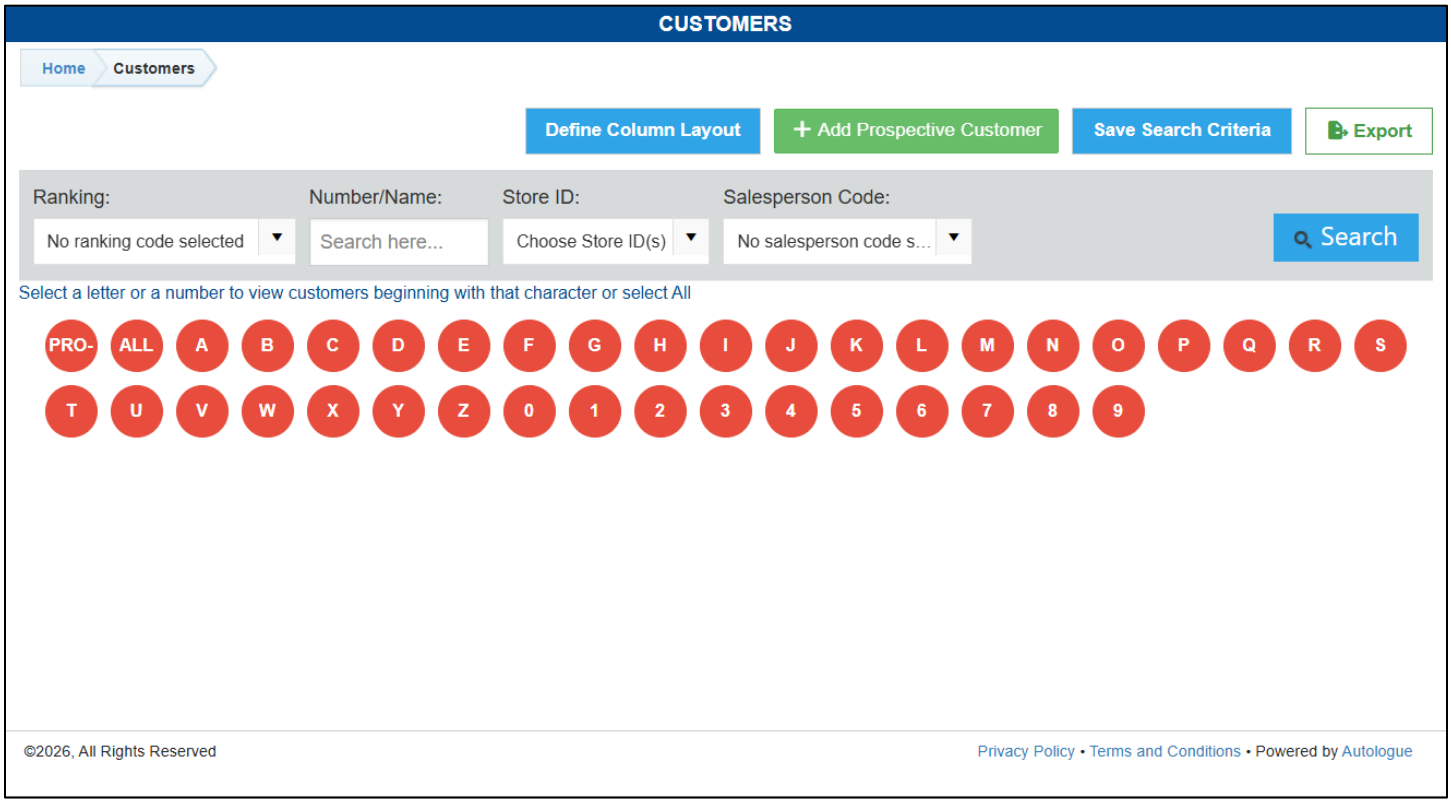
☞ **Note: Fields that have a red asterisk displayed (*) indicates it is a required field and must have an entry selected before the note can be saved.**

- 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:

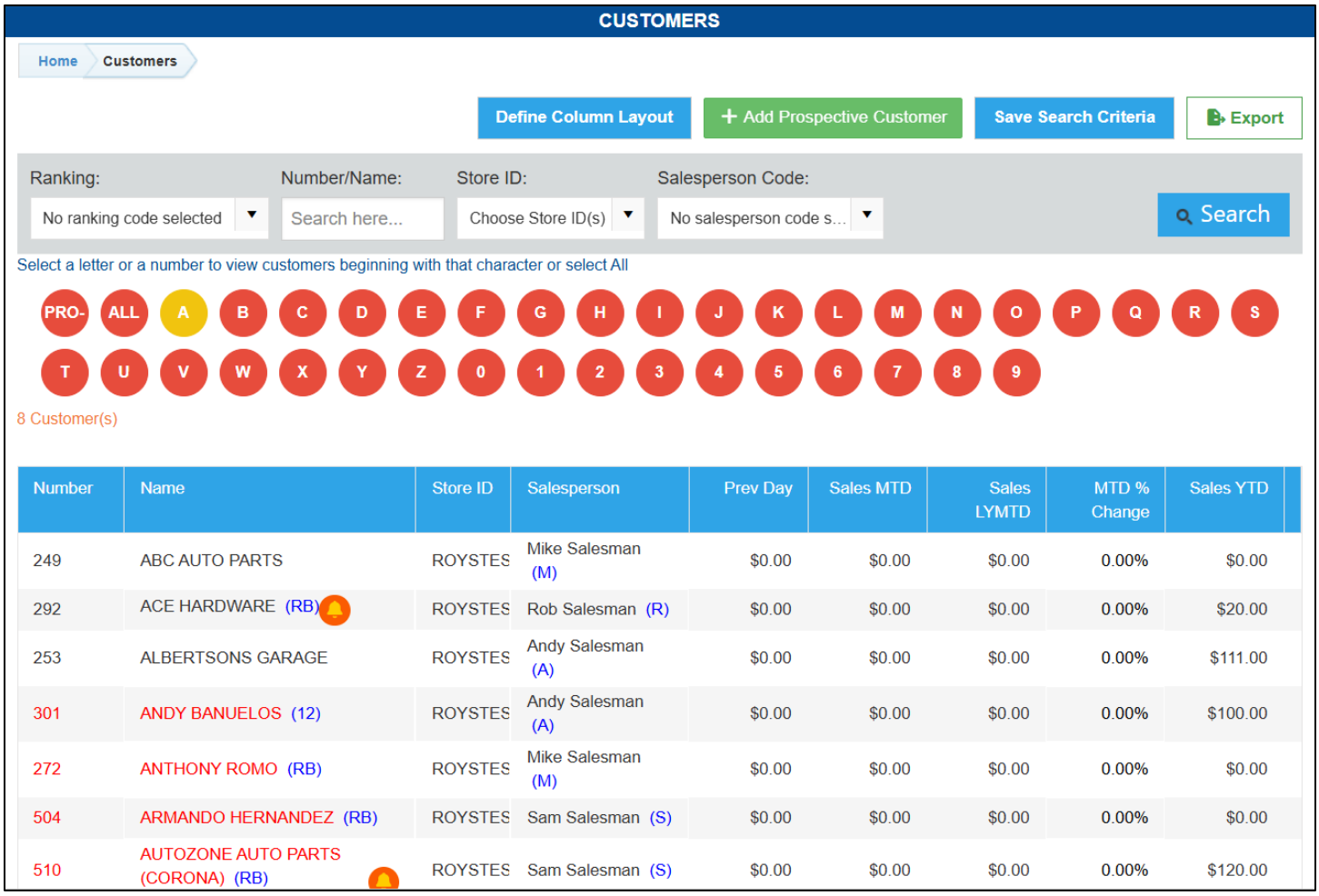


By default, no customers are displayed on the screen.

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 a complete list of all customers.

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.



Number	Name	Store ID	Salesperson	Prev Day	Sales MTD	Sales LYMTD	MTD % Change	Sales YTD
249	ABC AUTO PARTS	ROYSTES	Mike Salesman (M)	$0.00	$0.00	$0.00	0.00%	$0.00
292	ACE HARDWARE (RB)	ROYSTES	Rob Salesman (R)	$0.00	$0.00	$0.00	0.00%	$20.00
253	ALBERTSONS GARAGE	ROYSTES	Andy Salesman (A)	$0.00	$0.00	$0.00	0.00%	$111.00
301	ANDY BANUELOS (12)	ROYSTES	Andy Salesman (A)	$0.00	$0.00	$0.00	0.00%	$100.00
272	ANTHONY ROMO (RB)	ROYSTES	Mike Salesman (M)	$0.00	$0.00	$0.00	0.00%	$0.00
504	ARMANDO HERNANDEZ (RB)	ROYSTES	Sam Salesman (S)	$0.00	$0.00	$0.00	0.00%	$0.00
510	AUTOZONE AUTO PARTS (CORONA) (RB)	ROYSTES	Sam Salesman (S)	$0.00	$0.00	$0.00	0.00%	$120.00

☞ **Note: When the `EXCLUDE PROSPECTIVE CUSTOMERS FROM CUSTOMER LIST "ALL" BUTTONS` setting option is enabled and the user clicks on any of the red buttons (except the prospect button) within the *Customer* list screen, all the prospective customers will be excluded from the list. When the setting is disabled, all the prospective customers will be included within the customer list as they always have.**

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, date of last note, and date of last sale.

- Clicking on a column header will sort the list by that column in either ascending or descending order.
- Prospective customers are created by clicking the green `+Add Prospective Customer` button.

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 and descriptions (if setup) to 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 Number/Name

- Click within the Number/Name 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 a 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.

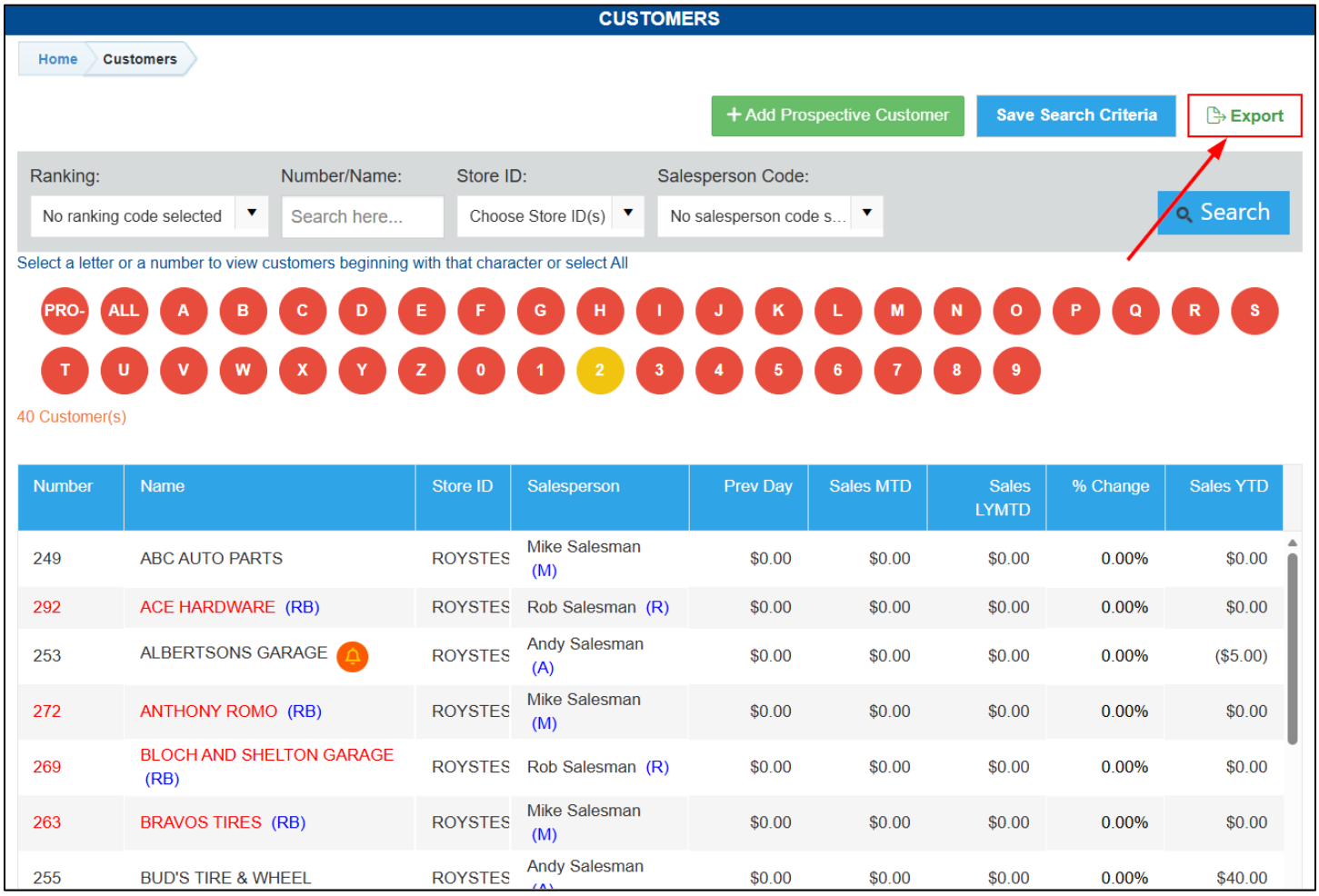
The current search criteria will automatically be displayed when clicking on the Customers tile from the home page. Logging out will not clear the saved search.

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 `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*).

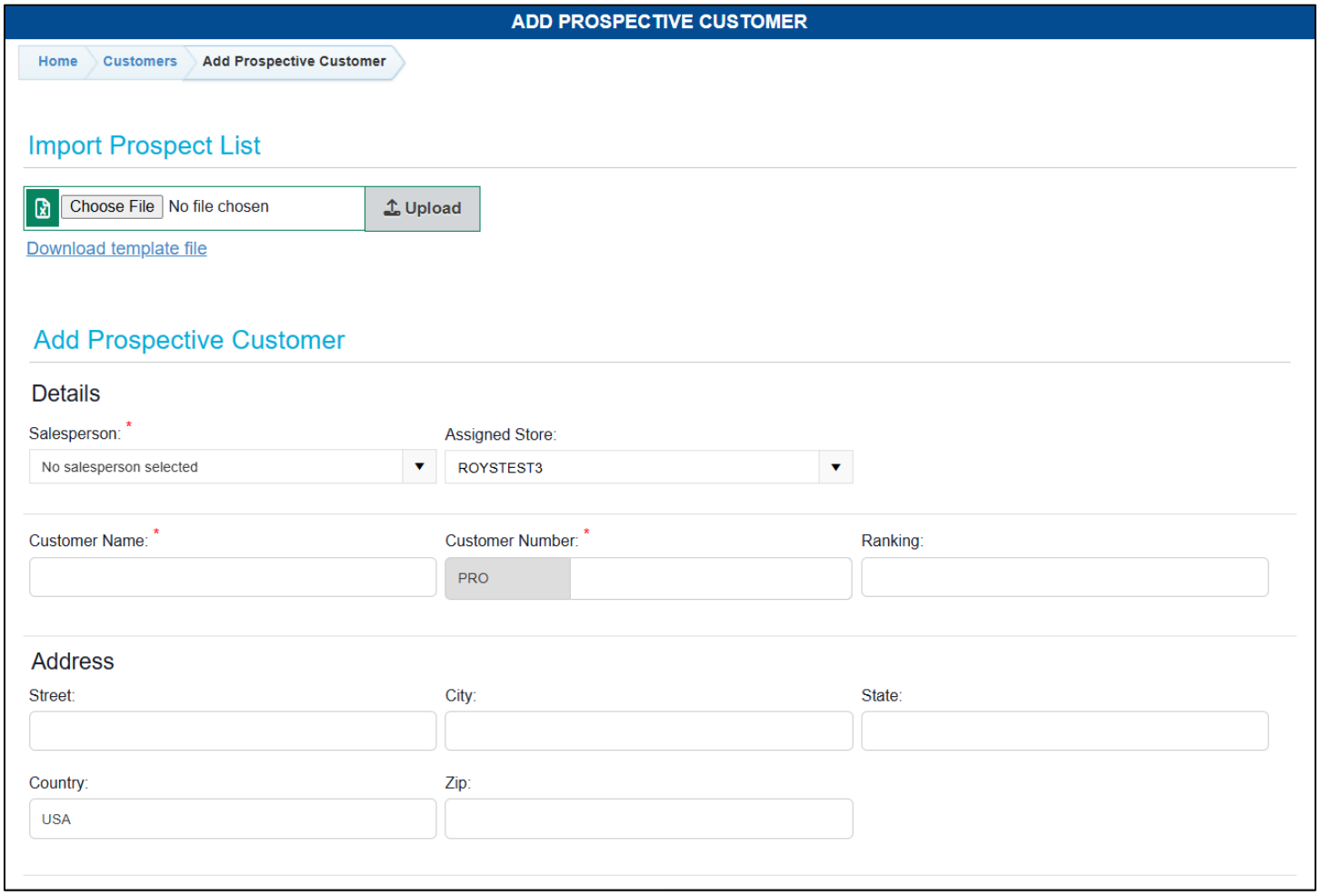


Shown below is example of the export file:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Number	Name	Ranking	Store ID	Salesperson	Prev Day	Sales MTD	Sales LYMTD	% Change	Sales YTD	Sales LYTD	% Change (2)	Date Last Sale	Date Last Note
2	249	ABC AUTO PARTS		ROYSTEST3	Mike Salesman	0.00	0.00	0.00	0.00	0.00	100.00	-100.00	03/06/2025	02/04/2026
3	292	ACE HARDWARE	RB	ROYSTEST3	Rob Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00		01/22/2026
4	253	ALBERTSONS GARAGE		ROYSTEST3	Andy Salesman	0.00	0.00	0.00	0.00	-5.00	100.00	-105.00	11/05/2025	05/14/2026
5	272	ANTHONY ROMO	RB	ROYSTEST3	Mike Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00		06/19/2025
6	269	BLOCH AND SHELTON GARAGE	RB	ROYSTEST3	Rob Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00		01/29/2020
7	263	BRAVOS TIRES	RB	ROYSTEST3	Mike Salesman	0.00	0.00	0.00	0.00	0.00	0.00	0.00		08/19/2025
8	255	BUD'S TIRE & WHEEL		ROYSTEST3	Andy Salesman	0.00	0.00	0.00	0.00	40.00	135.00	-70.37	04/03/2026	05/11/2026

Adding A Prospective Customer

- To add a new prospective customer, click on the green `+Add Prospective Customer` button and following screen will be displayed:



The screen will show all the entry fields and those that are required (* Indicates Required). When the REQUIRE EXTENDED PROSPECTIVE CUSTOMER INFORMATION setting option is **enabled**, all fields are required except for the Ranking. When the setting is **disabled**, only the Salesperson, Salesperson Code, Customer Name and Customer Number fields are required.

- Select and fill in information for all the required fields. The user will be required to choose a customer number (the program will not allow duplicates), and other pertinent information. Click on the `Save` button to save the information and return to the *Customers* view screen.

Importing Prospect Customers

When the ALLOW IMPORTING PROSPECTIVE CUSTOMERS setting option is **enabled**, an *Import Prospect List* screen section will be displayed at the top of the screen. When the setting is **disabled**, the *Import Prospect List* screen section will NOT be displayed at the top of the screen.

- To import prospective customers, click on the `Download template file` link to download an Excel spreadsheet file (*ImportProspectTemplate.xlsx*). This file can be used as an import file.

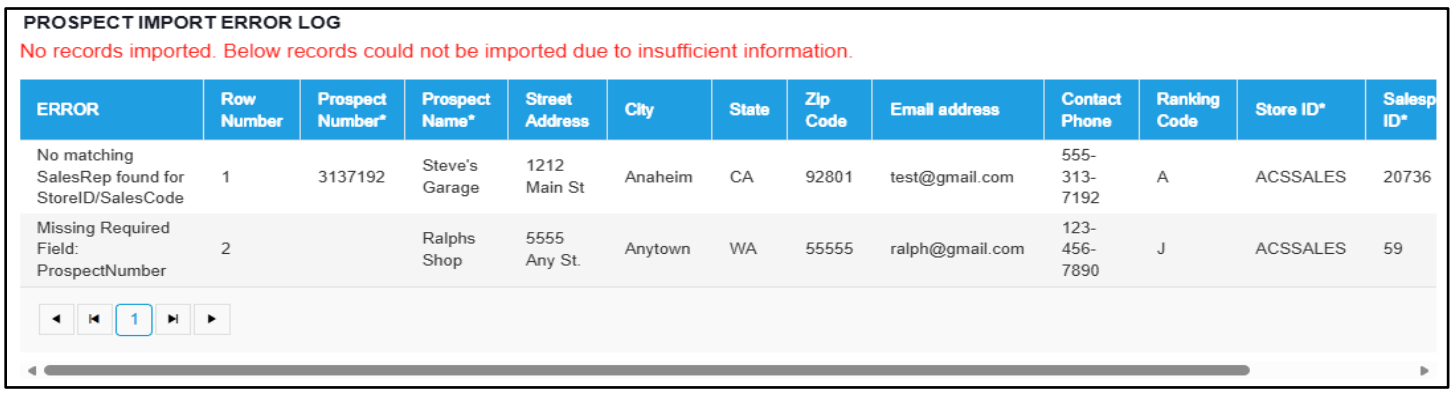
☞ **<u>Note:</u> The template will change based upon the REQUIRE EXTENDED PROSPECTIVE CUSTOMER INFORMATION option setting. If <u>disabled</u>, the *Instructions* tab on the template will show more fields as "Not Required". If <u>enabled</u>, it will show more fields as "Required".**

Instructions Tab

	A	B	C	D	E	F	G	H	I	J	K	L
1	**Unique Prospect Number**	**Prospect Name**	**Street Address**	**City**	**State**	**Zip Code**	**Email address**	**Contact Phone**	**Ranking Code**	**Store ID**	**Salesperson ID**	**Salesperson Code**
2	REQUIRED	REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	NOT REQUIRED	REQUIRED	REQUIRED	REQUIRED
3												
4	**Example data:**											
5	4657	Prospect 4657	123 Oak Street	Green	Ohio	60618	test@gmail.com	999-541-4657	14	6123	1106	GH
6												
7												
8	- Populate "Data" tab to upload											
9	- Do not delete header row on Data sheet											
10	- Suggest using last 4 phone digits for Prospect Number											
11	- Fill in all required fields											
12												
13												

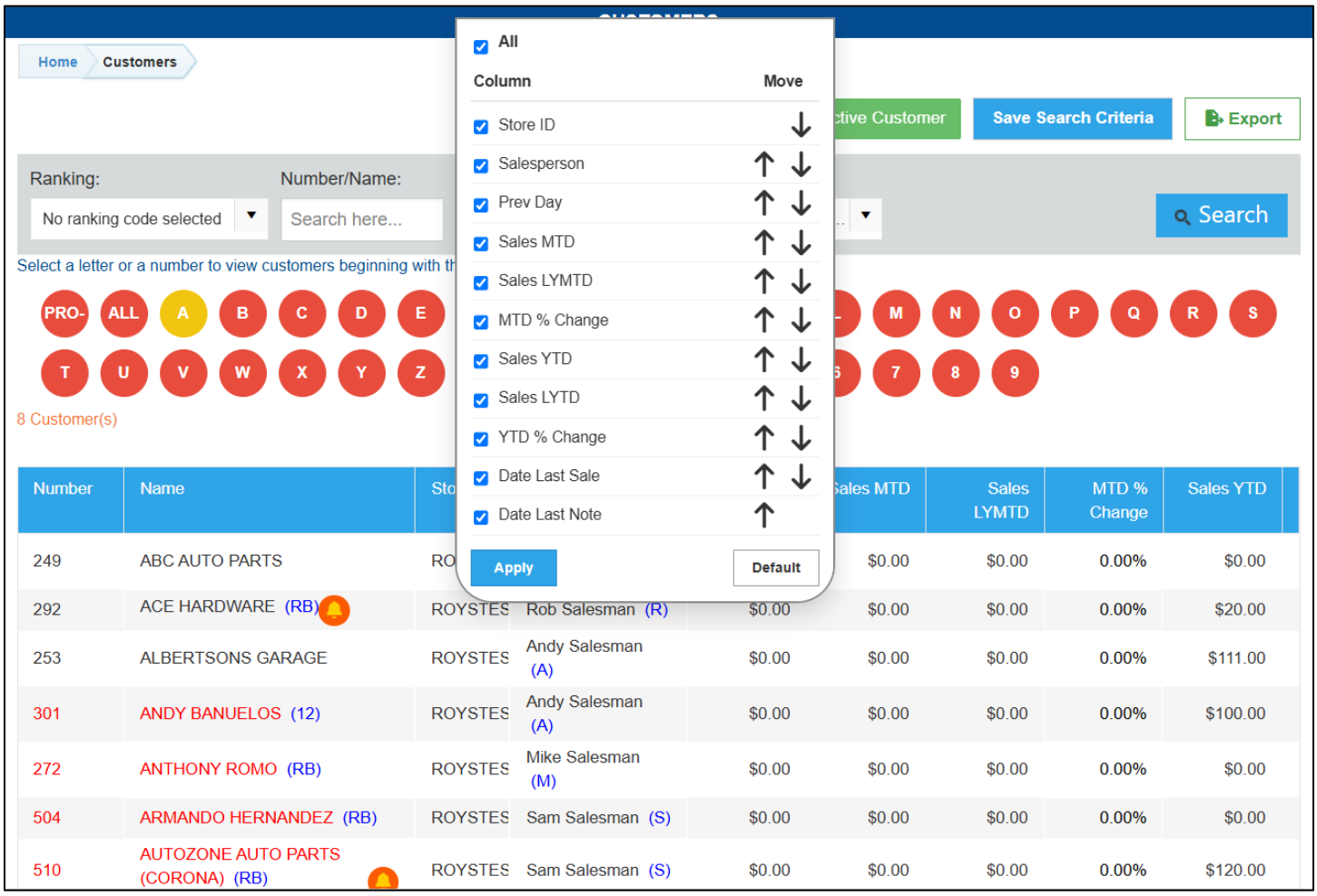
- Once the import file contains all the prospective customers within the *Data* tab, click on the `Choose File` button and select the Excel spreadsheet file to use to import. Click on the ↑`Upload` button to import the selected file.

If there are any errors during the import process, the screen will display an error log that will show both **`ERROR`** and **`Row Number`** columns designating what and where the error occurred. These can be fixed within the import file and re-imported.



Define Column Layout

- To rearrange or remove specific columns within the *Customers* list screen, click on the `Define Column Layout` button and a pop-up column list window will be displayed:



☞ **Note: The `Define Column Layout` button is only visible when the `ALLOWS CUSTOMER LIST LAYOUT ADJUSTMENT` settings option is enabled.**

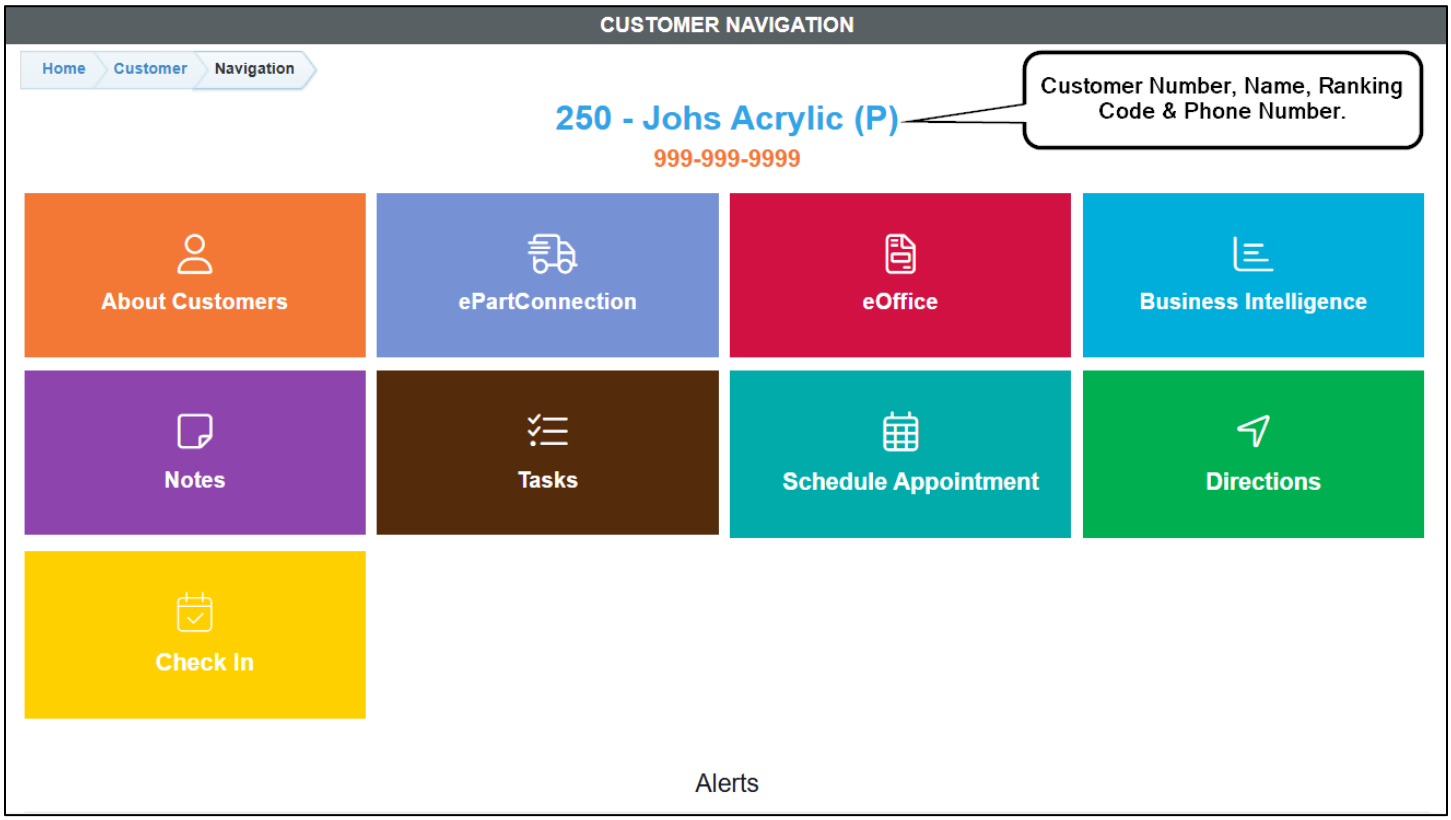
The pop-up columns window will show each column name, a check box besides each, and up/down (↑ ↓) arrows besides each.

- You can remove a column by unchecking the check box (□) to the left of the column name. Checked columns are displayed, unchecked columns are not displayed.
- To check or uncheck **ALL** of the columns, click on the check box (□) to the left of the `All` field.
- You can re-order the columns by clicking on the up/down (↑ ↓) arrows next to the column name.
- After selecting and moving columns, click on the blue `Apply` button to have the screen changes saved.
- To have all the columns put back to their original state, click on the `Default` button.

☞ **Note: Each user's screen layout is unique to that user.**

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.

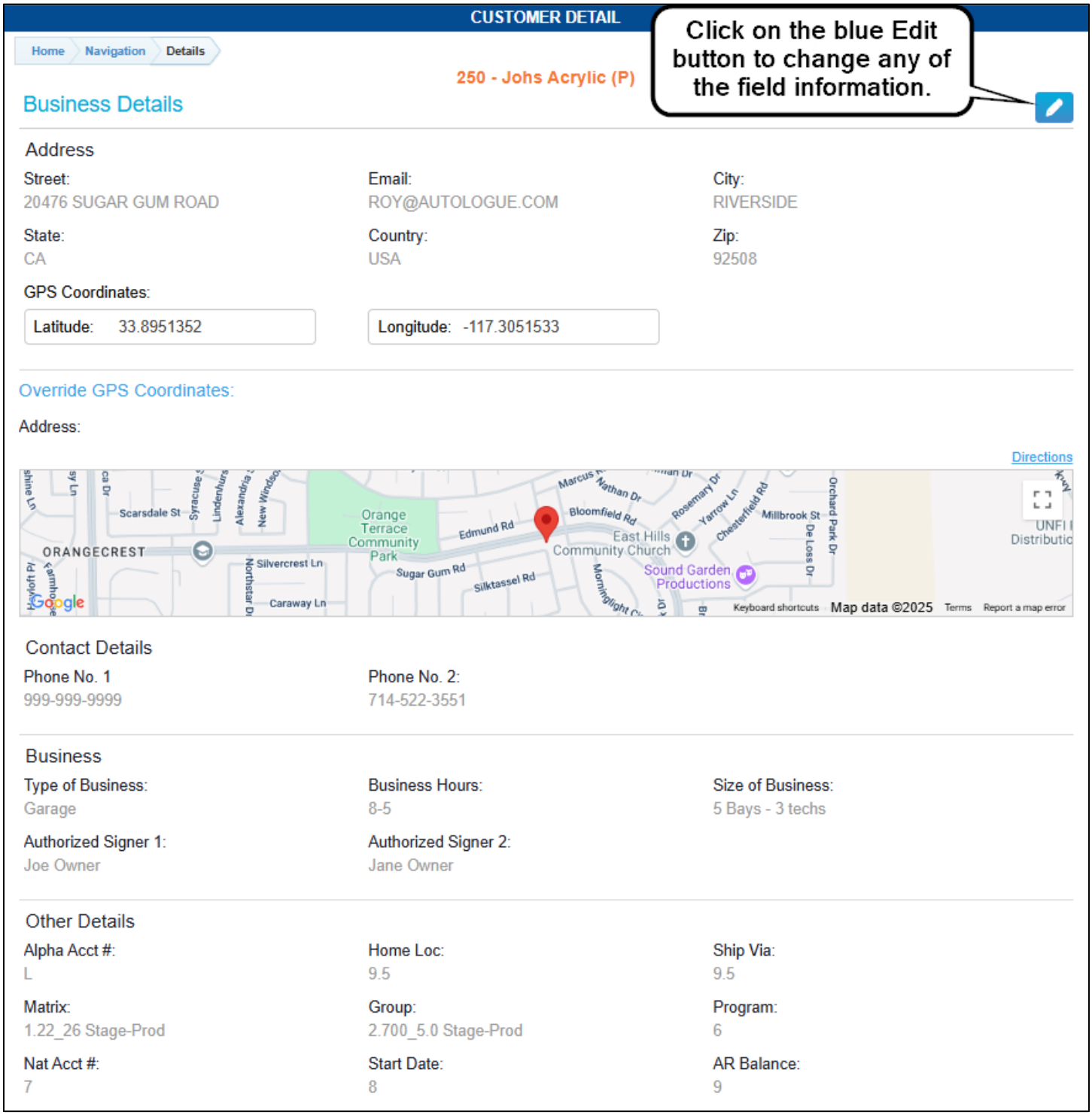
Here the user can click on a colored tile and perform the following for the selected customer:

• 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.
• Schedule Appointment: Schedule an appointment for this customer.	• Directions: Displays a map with directions to the selected customer.

• Check In/Out: The check In/Out tiles are used to save the GPS coordinates when "checking in" and record the date/time for both checking in/out when visiting a customer (color and label change depending on whether a check in has been performed).	• 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, contact details, business type/hours/size, authorized signers, other details, and notes) for the selected customer.

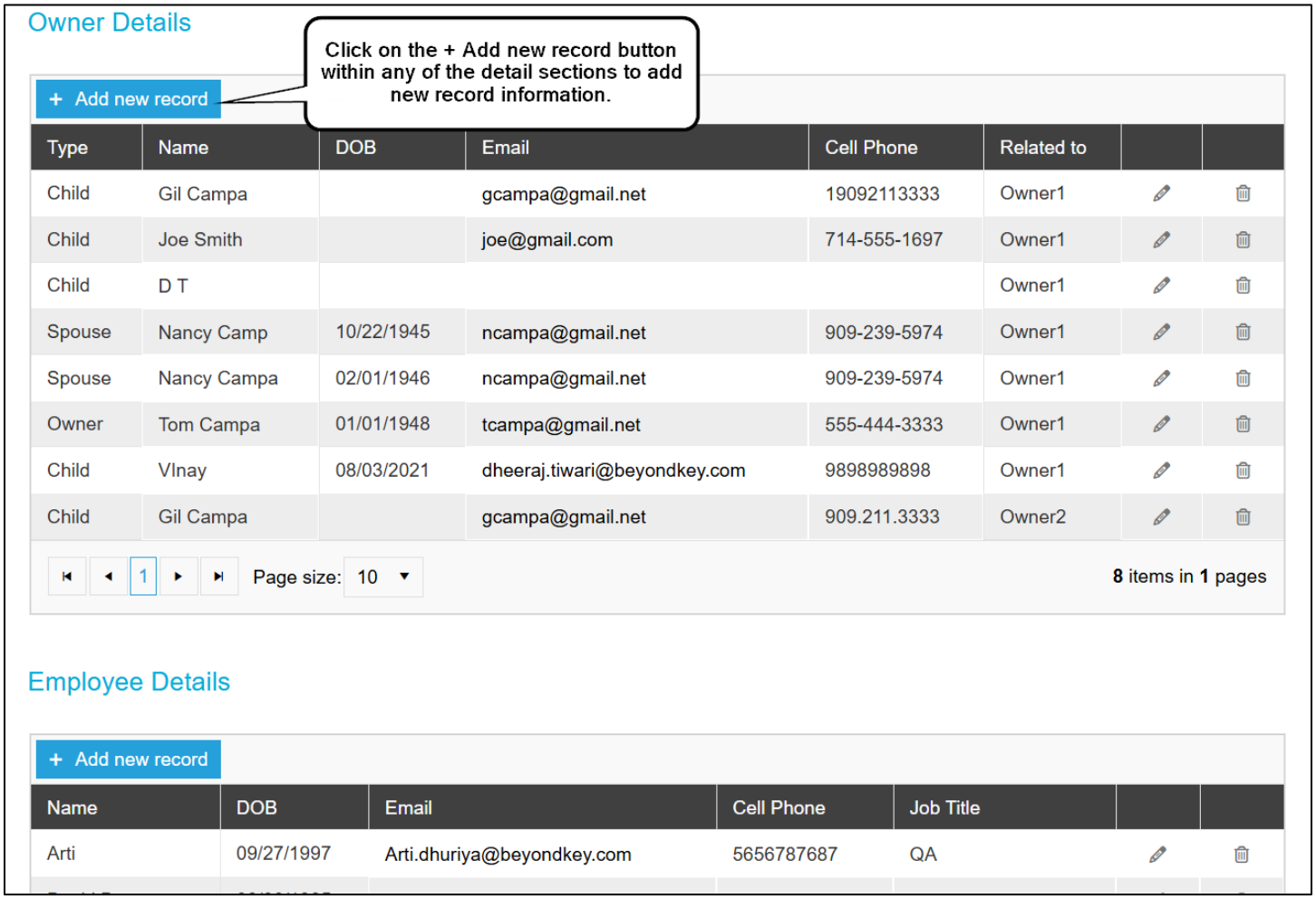
The GPS Coordinates: heading will display either GPS Coordinates, Imported GPS Coordinates, or Overridden GPS Coordinates depending on how the latitude/longitude coordinates were created. Shown below are how each is determined:

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

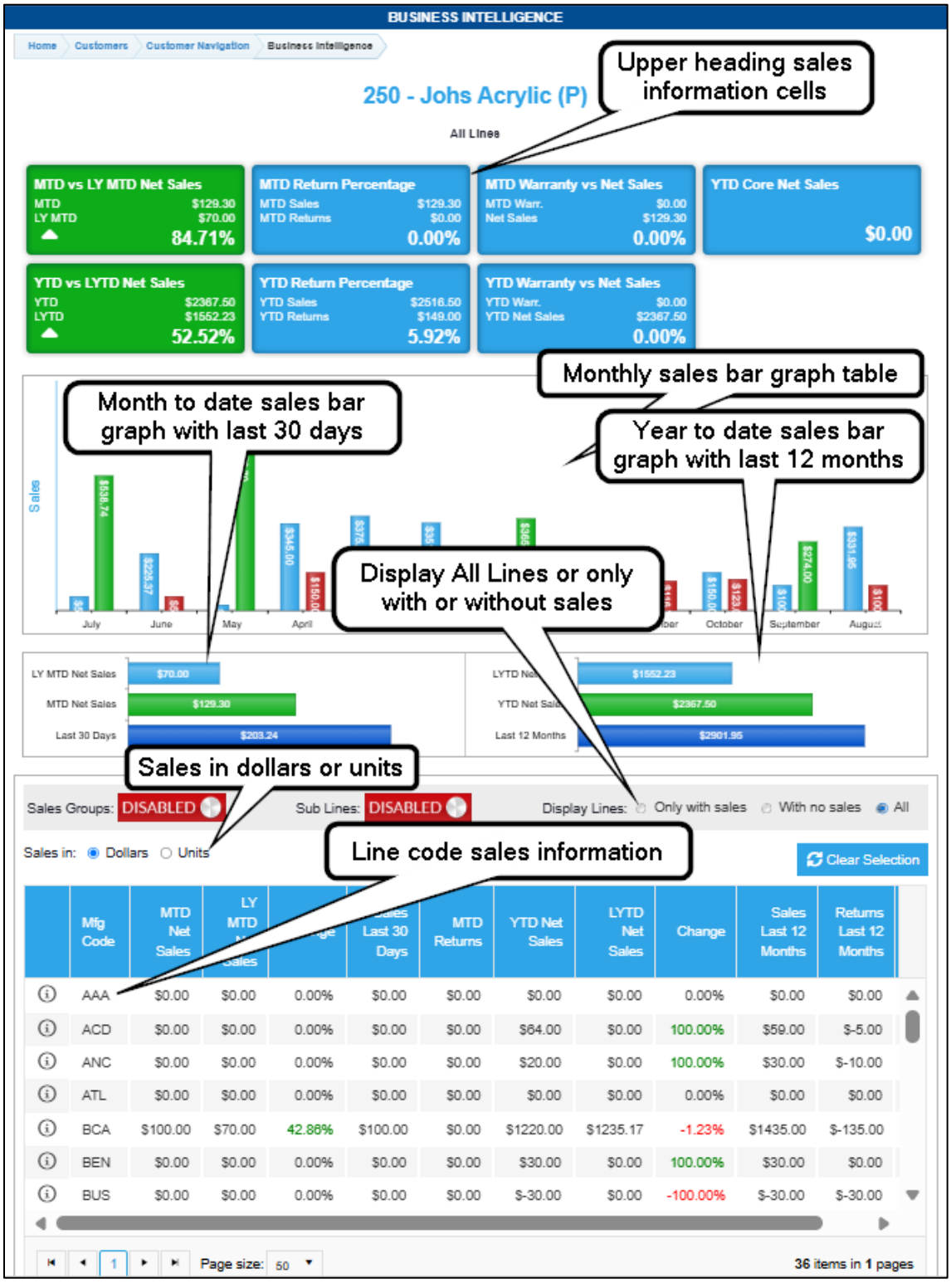
- From the *CUSTOMER NAVIGATION* screen, click on the `ePartConnection` colored menu tile and the ePart will be opened and you will be automatically logged into the customer's account within ePartConnection. Note: This tile is only visible if your company subscribes to ePartConnection.

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 Net Sales	Shows the Year To Date (YTD) core net sales dollar amount. This represents the dollar 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.

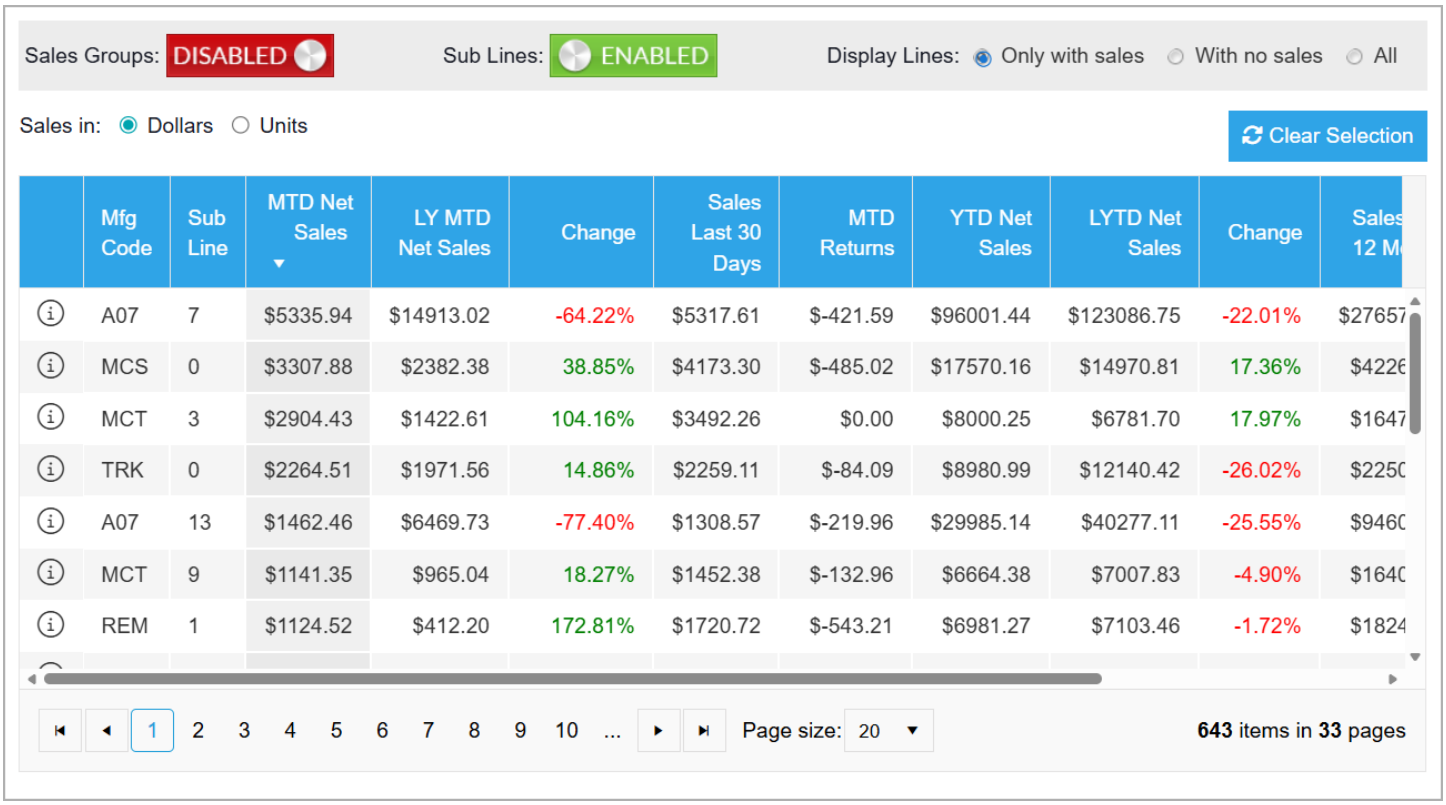
☞ **Note: These figures are based on "to date" which means if we are 15 days into the current month and 180 days into the current year, the LY (last year) MTD (month to date) and YTD (year to date) sales figures are based upon those day amounts. The graphs also show the Last 30 Days and Last 12 Months.**

Line Code Sales Information Section

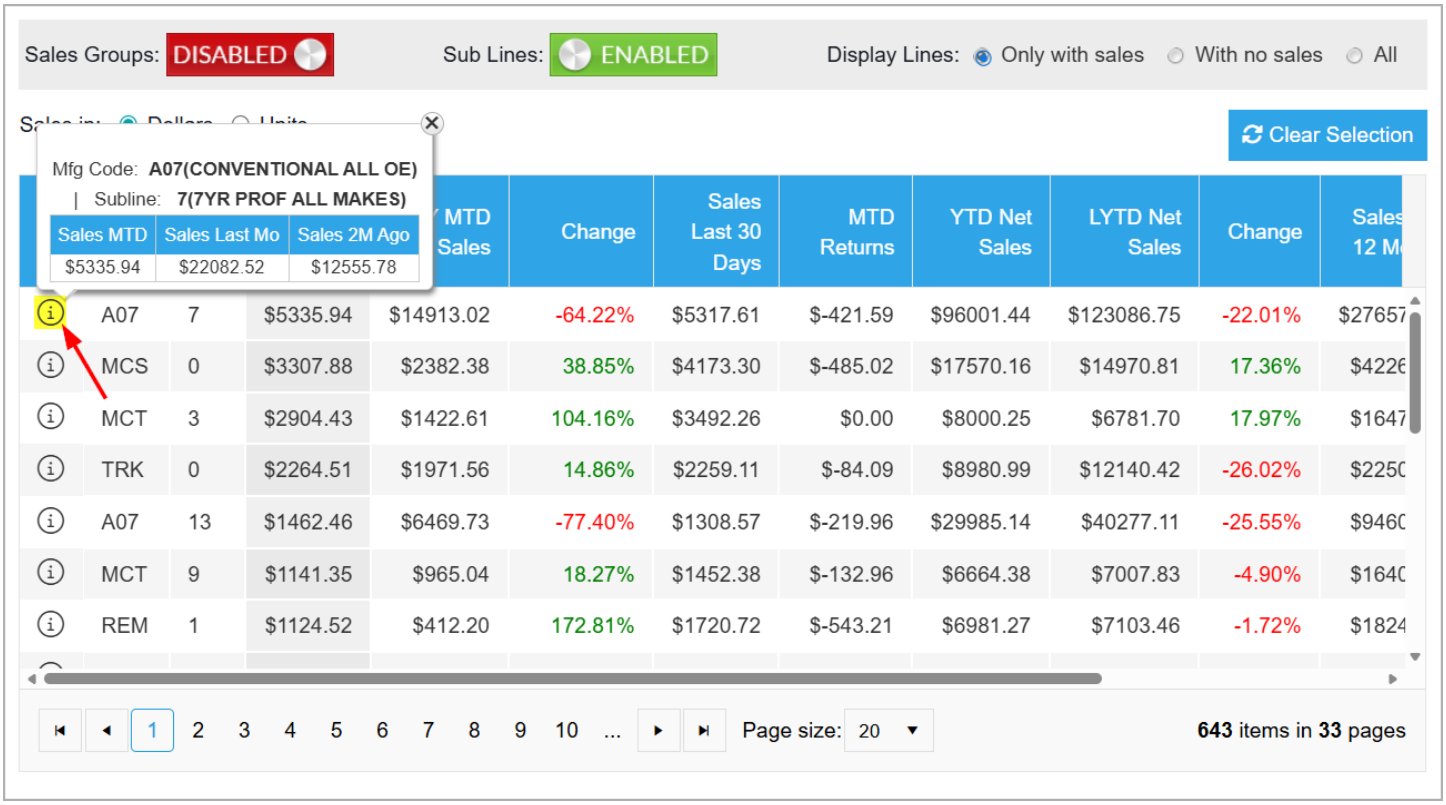
☞ **Note: Clicking on any line, sales group total line or line and sub line inside a sales group will change all graphs at the top to reflect only that choice. The header at the top of the page will reflect the graphs currently displaying. All columns are sortable by clicking the column header.**

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.
MTD Net Sales/MTD Units Sold	Shows the Month To Date (MTD) sales dollar amount or units sold for the line code.
LY MTD Net Sales/LY MTD Units Sold	Shows the Last Year (LY) Month To Date (MTD) sales dollar amount or unit sold 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 or units.
Sales Last 30 Days/Last 30 Days Units Sold	Last 30 calendar days sales or units. This is helpful during the first days of a new month or year.
MTD Returns/Units Returned MTD	Shows the Month To Date (MTD) inventory returns dollar amount or units returned.
YTD Net Sales/YTD Units Sold	Shows the Year To Date (LYTD) sales dollar amount or units sold for the line code.
LYTD Net Sales/LYTD Units Sold	Shows the Last Year To Date (LYTD) sales dollar amount or units sold 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 or units sold.
Sales Last 12 Months/Last 12 Month Units Sold	Last 12 calendar month's sales amount or units sold. This is helpful during the first days of a new month or year.
Returns Last 12 Months/Units Returned Last 12 Months	Last 12 calendar month's returns dollar amount or units returned.
YTD Core Net Sales/YTD Core Net Sales	Shows the Year To Date (YTD) cores net sales dollar amount or units. This represents the dollar amount or units of cores charged for and not yet returned.

Sales information can be listed by either dollars or units by clicking on the `Dollars` or `Units` selection besides the `Sales in:` field as shown below:



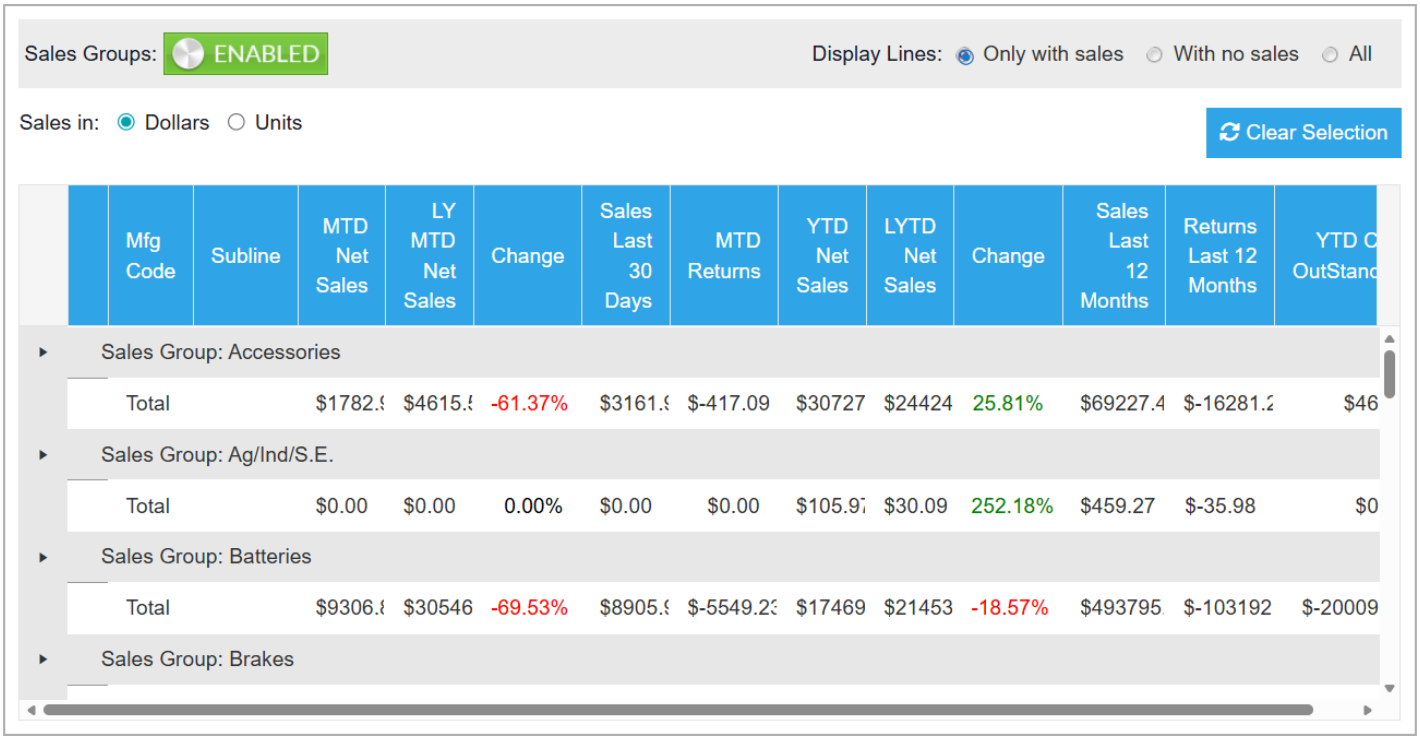
- Clicking or hovering on the "i" icon displays a pop-up window that displays Mfg Code/Subline codes and descriptions as well as 3 months of sales (month to date, last month, 2 months ago) as shown:



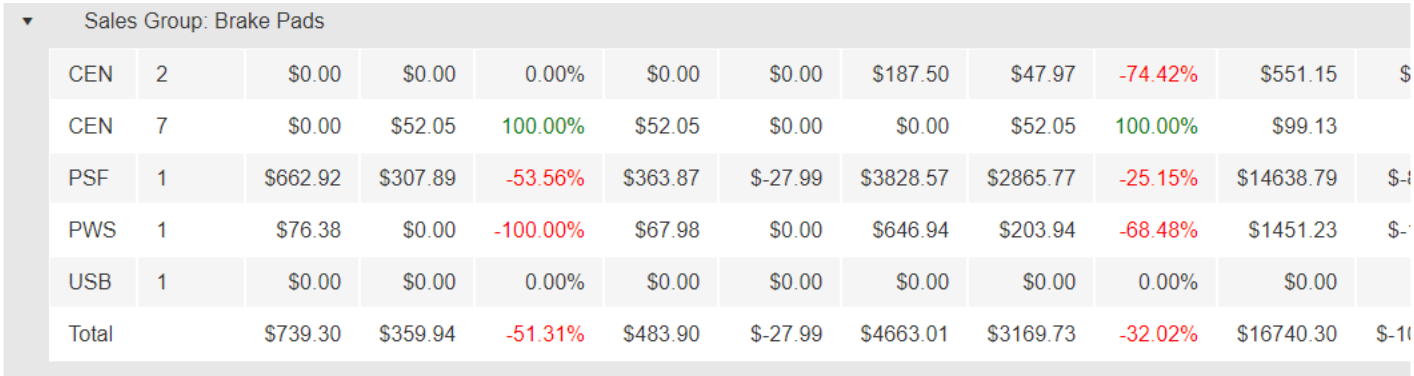
Sales Groups

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

Sales group information can be listed by either dollars or units by clicking on the `Dollars` or `Units` selection besides the `Sales in:` field as shown below:



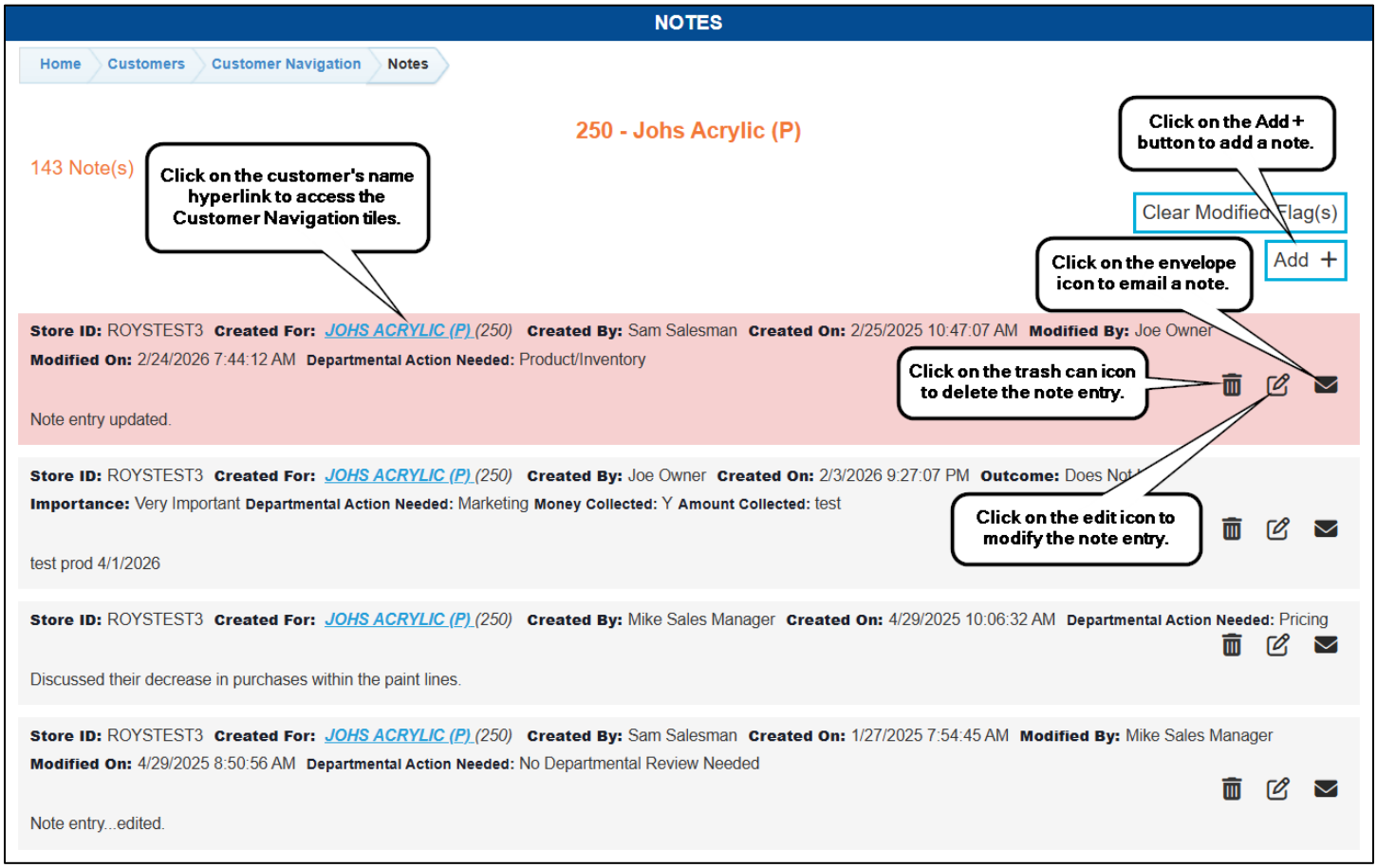
- The user has the option to see all lines (*All*), only lines with no sales (*With no sales*), or only lines with sales (*Only with sales*) by checking an option.
- Each group is expandable by clicking the arrow next to the name. This will display all Lines making up that group.



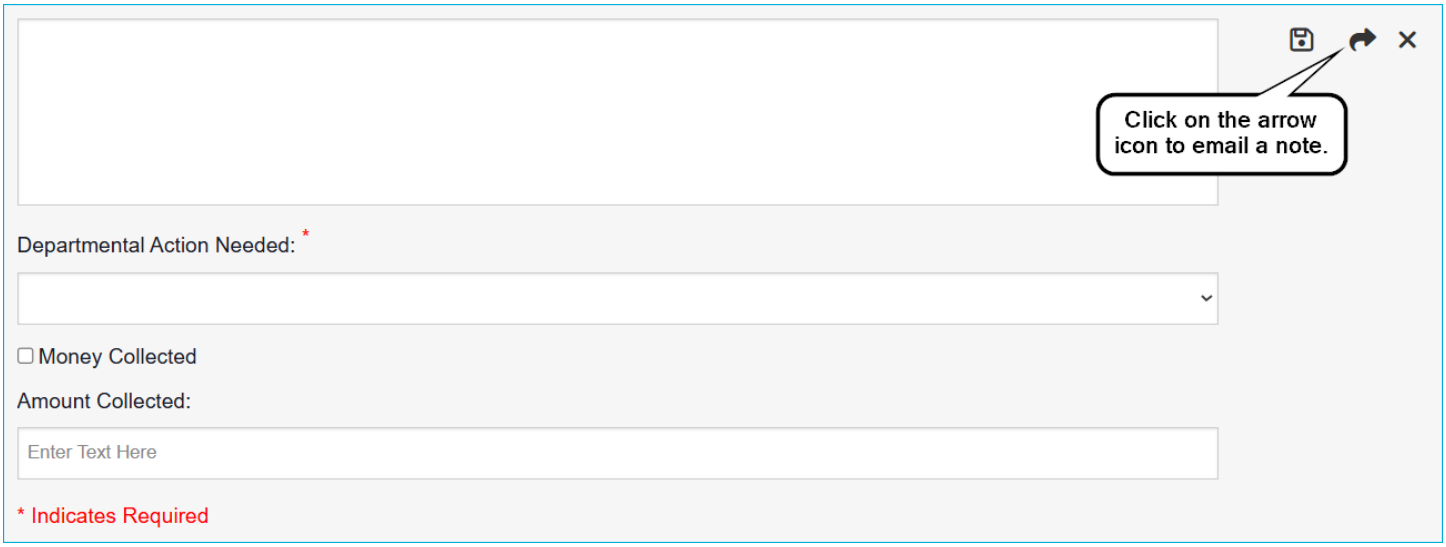
☞ **<u>Note:</u> Within the Customer's BI Graph, each user can now set the view they would like to see, as it "remembers" the filter settings for Sales Groups (enabled/disabled), Sub Lines (enabled/disabled), and Display Lines (All/With no sales/Only with sales) to be displayed as set in subsequent logins.**

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:

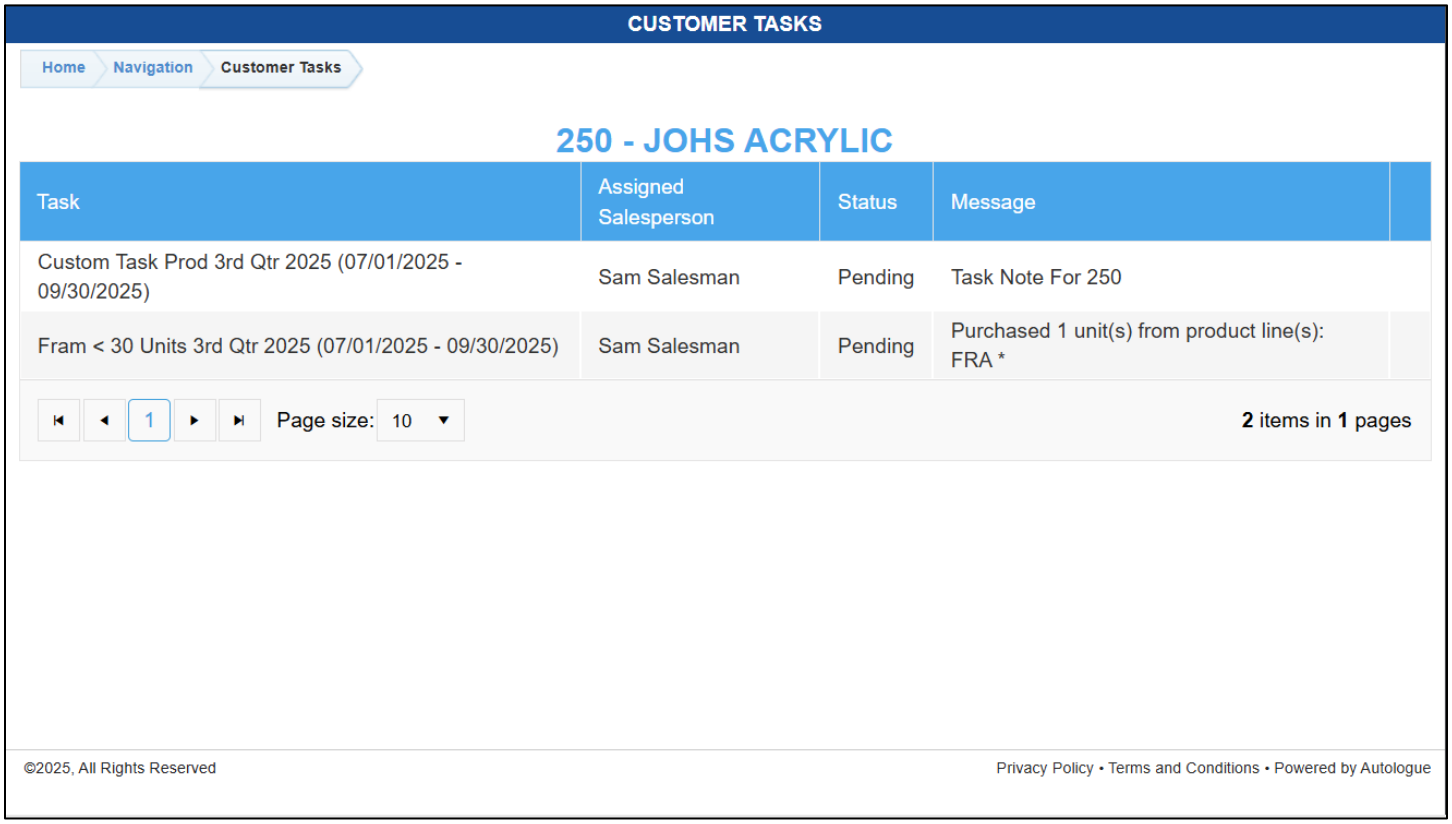


The note entry displays the customer's store ID, actual note, the creation/last modification dates, and the names of who created/modified the note entry. A note can be added by clicking on the (Add ✚) button. The existing note entry can be modified by clicking on the edit note (✎) icon. A note can be 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

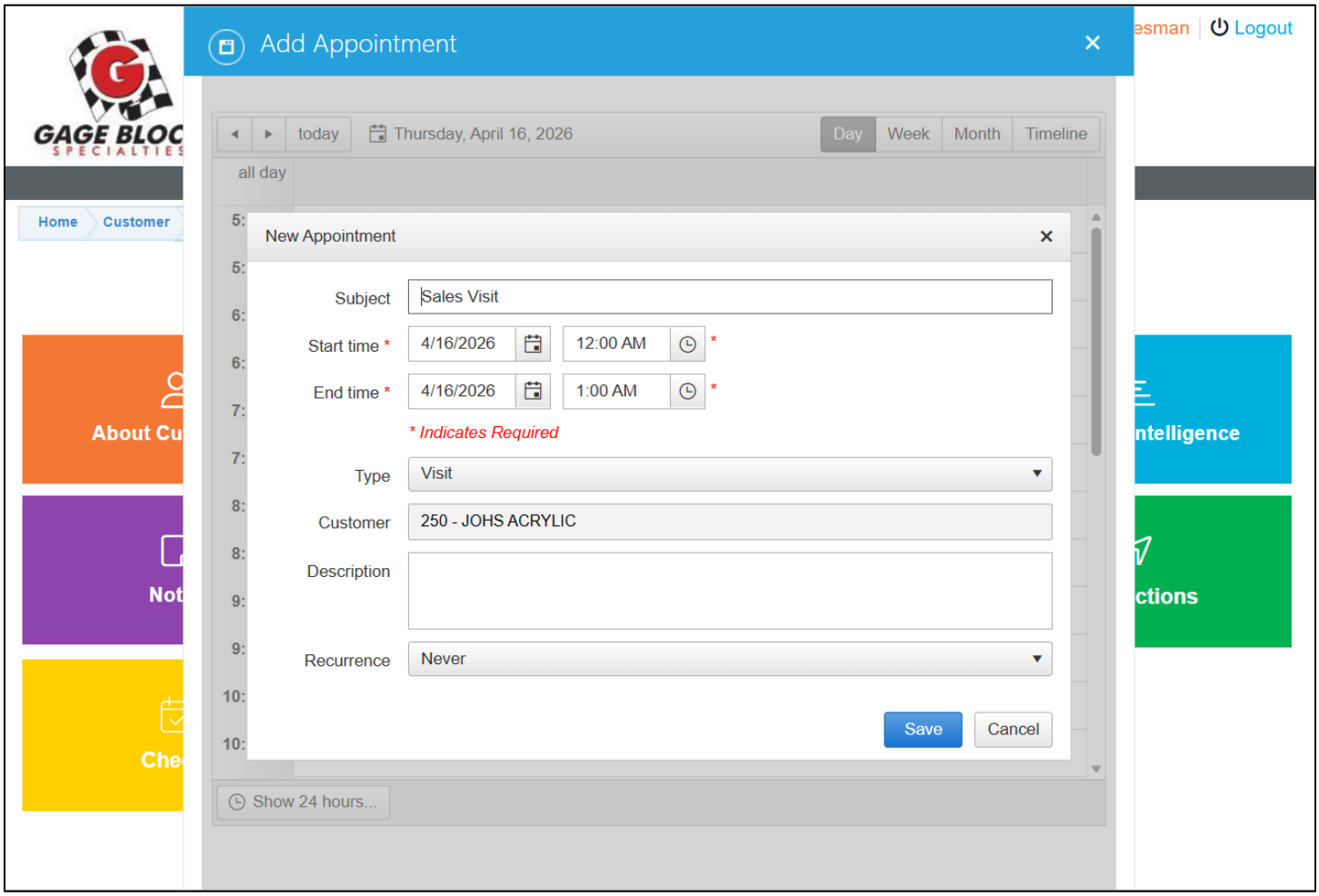
- From the *CUSTOMER NAVIGATION* screen, click on the `Tasks` tile and the screen will display any pending tasks for the customer as shown:



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 note icon will be missing and the *Status* column will display *Completed*.

Schedule Appointment

- From the *CUSTOMER NAVIGATION* screen, click on the `Schedule Appointment` colored menu tile and the screen will display an *Add Appointment* pop-up window for the customer as shown:

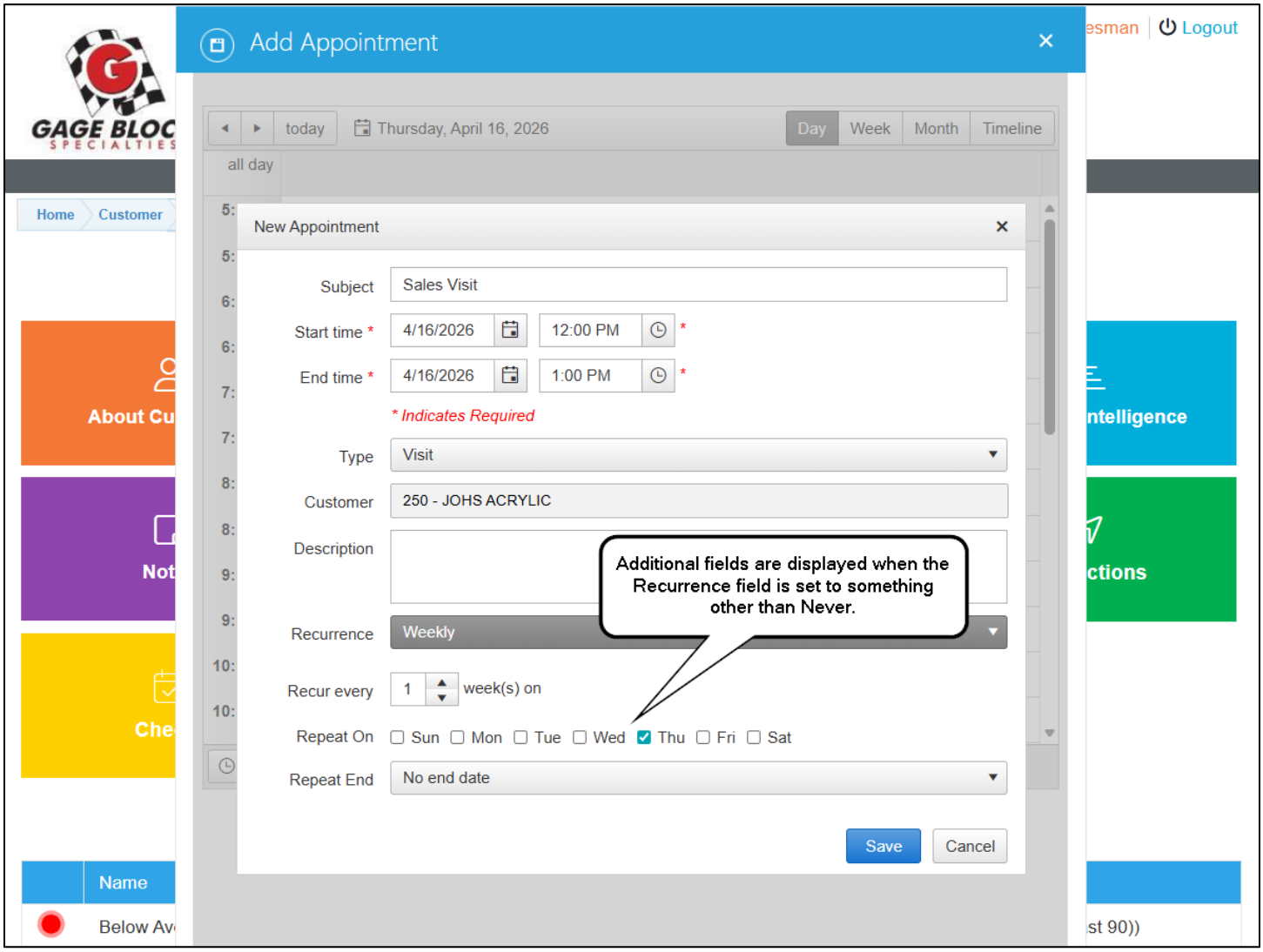


The screen will now display an `Add Appointment` pop-up window with the `Subject` field defaulted to *Sales Visit* and the appointment `Type` field defaulted to *Visit*.

- With the cursor positioned within the `Subject` field, you have the option to change the default value of *Sales Visit* and press the `<Tab>` key.
- With the cursor positioned within the `Start time` date field, you have the option to change the default date and time by clicking on the calendar (🗓)/clock (🕒) icons to select a different date and/or start time and then press the `<Tab>` key.
- With the cursor positioned within the `End time` field, you have the option to change the default date and time by clicking on the calendar (🗓)/clock (🕒) icons to select a different date and/or end time and then press the `<Tab>` key.
- With the cursor positioned within the `Type` field, you have the option to change the default value of *Visit* by clicking on the down arrow at the end of the field to view a drop-down selection list of *Visit*, *Follow Up* or *Call*. Click on the desired type and press the `<Tab>` key.

- With the cursor positioned within the `Description` field, you have the option to enter in a description and press the `<Tab>` key.
- If the appointment is going to be a recurring occurrence, you have the option to change the default value of *Never* by clicking on the down arrow at the end of the field to view a drop-down selection list of *Never, Hourly, Daily, Weekly, Monthly,* or *Yearly*. Click on the desired type and press the `<Tab>` key.

The bottom of the `Add Appointment` pop-up window will display additional fields in regards to the selected recurrence as shown:



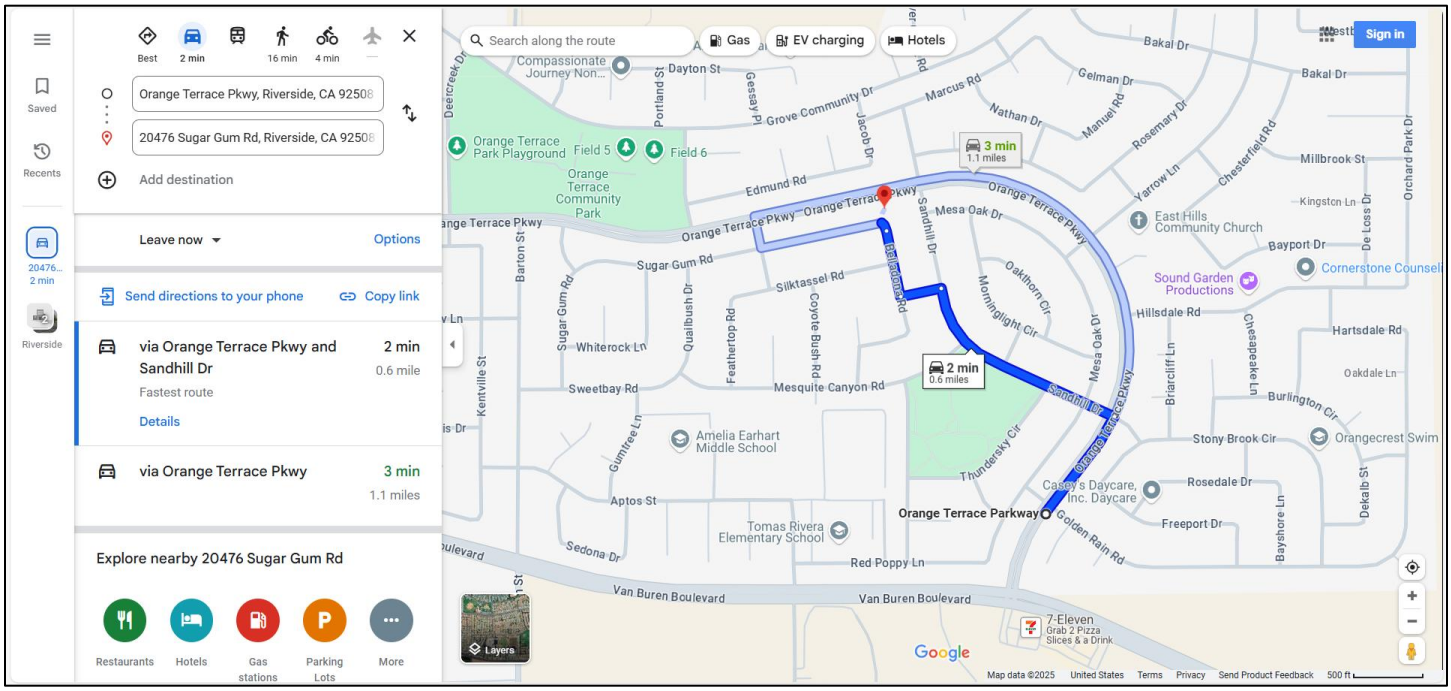
When the `Recurrence` field is set to anything other than *Never*, set the additional recurrence specific fields accordingly. You have the option to change any of the default values to match the frequency of your recurring appointment.

- Once all your fields have been setup, click on the `Save` button.

The appointment will now be displayed within the time slot setup within the `SCHEDULE`.

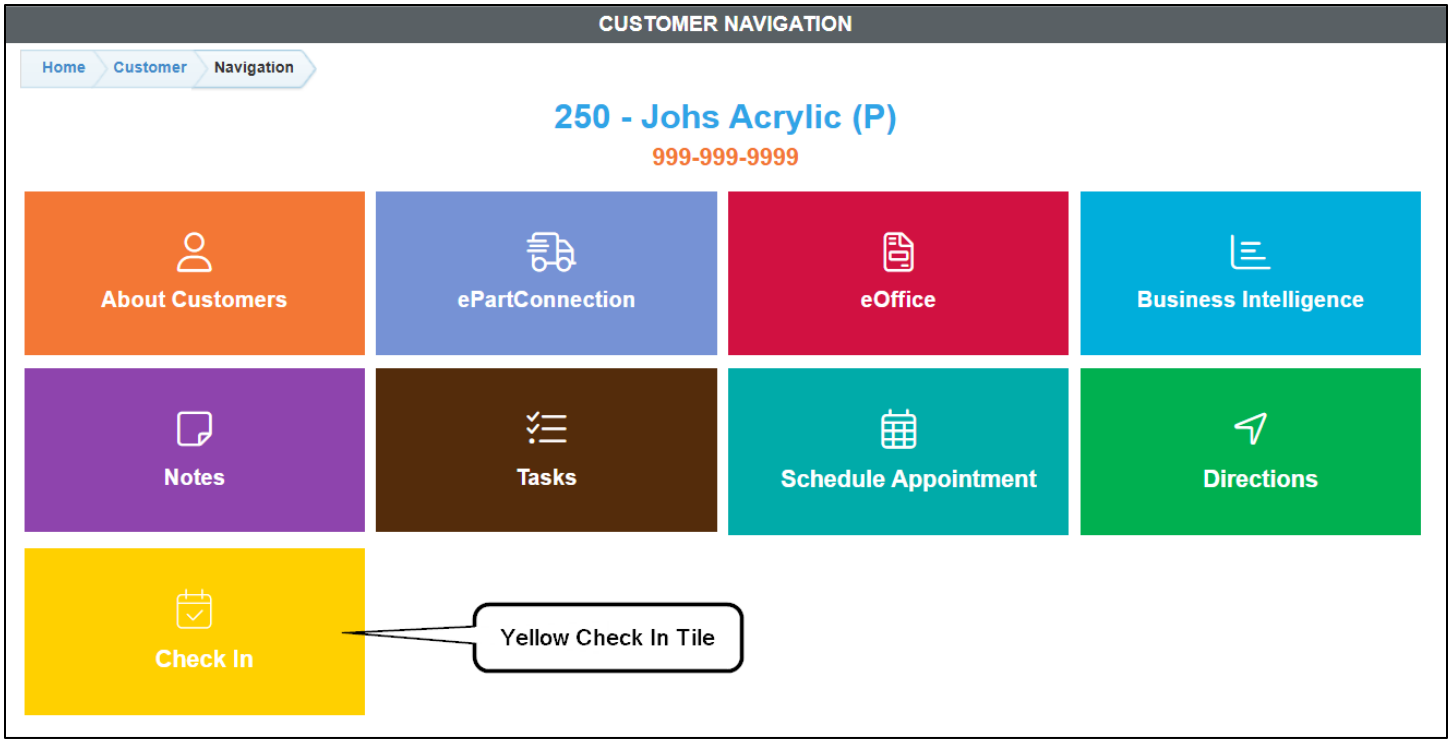
Directions

- 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:

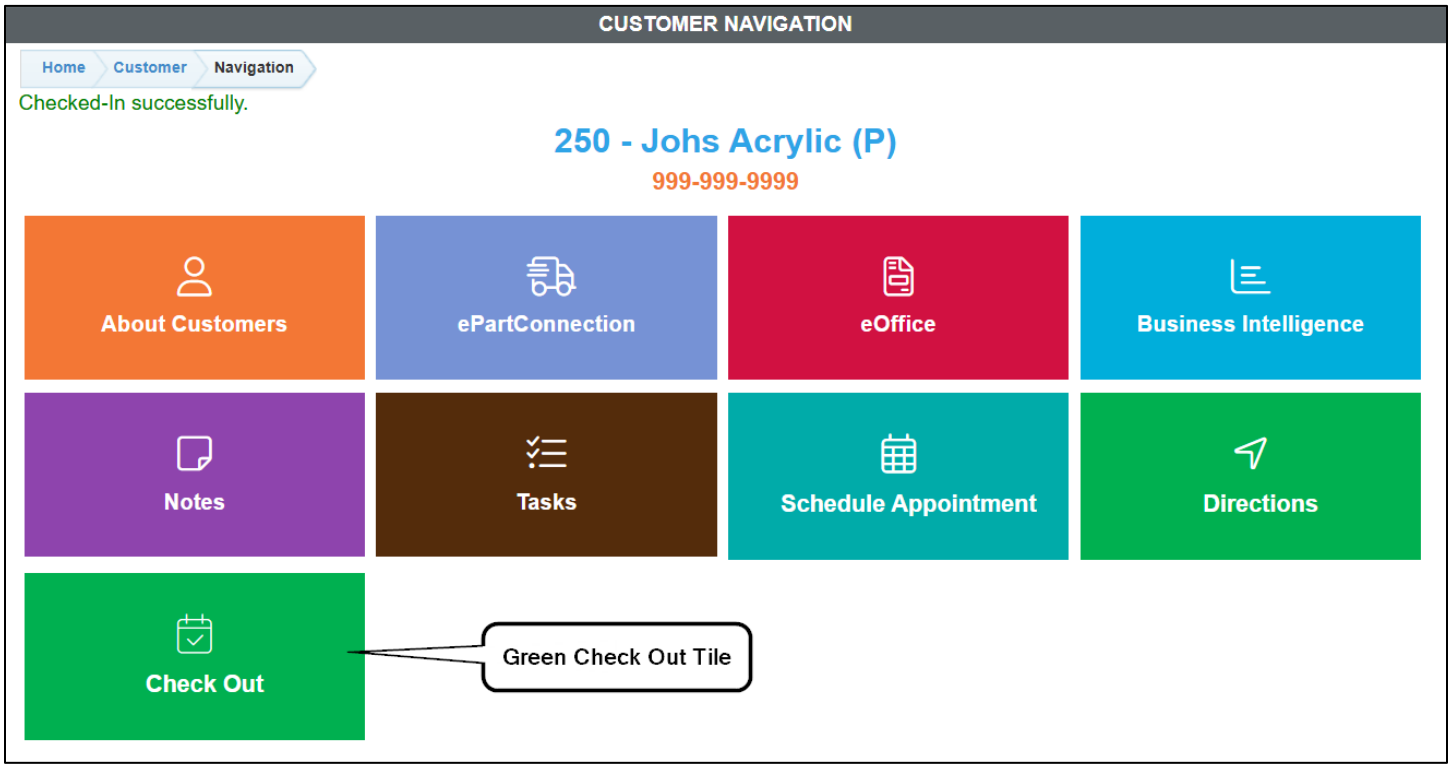


Check In/Check Out

The `Check In/Check Out` tiles are used for checking in and out when visiting a customer (color and label change depending on whether a check in has been done). Initially, a yellow `Check In` tile is displayed as shown:



- Once the user clicks on the yellow tile and "checks in," the screen will display "Checked-In successfully" in green text and the tile then changes to a green `Check Out` tile as shown:



- Once the user clicks on the green tile and "checks out," the tile will then change back to a yellow `Check In` tile again.

☞ **Note: The check in/out tiles are always visible and are not dependent on whether the customer has a scheduled appointment or is assigned to a workday.**

Yellow Check In

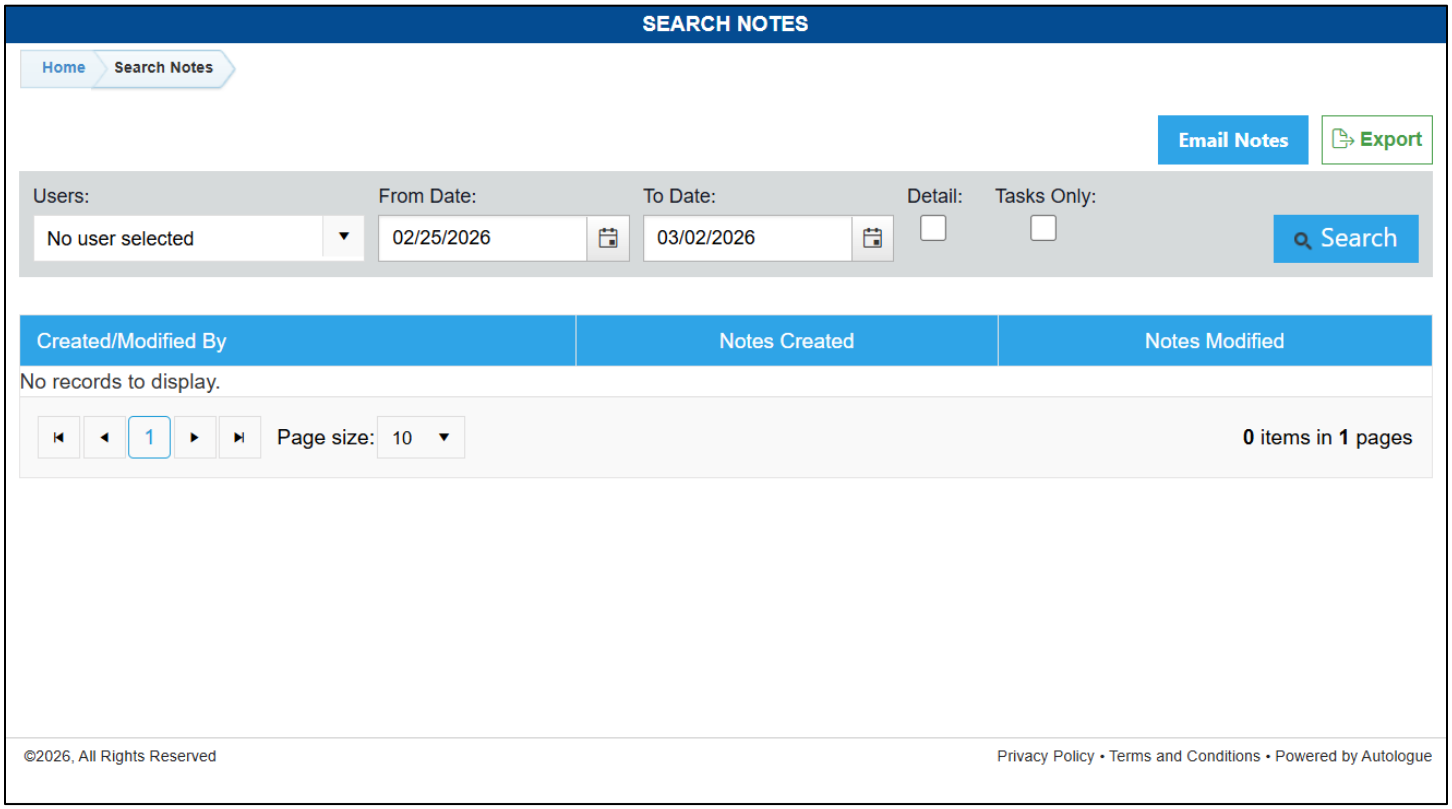
Upon clicking the yellow "Check In" tile, an entry will be made within the *Customer Visits->In-Out* tab screen showing a date/time entry under the "Check In" column and an orange (checked in within geofence) or a light purple (checked in outside geofence) pinpoint will be created on the *Map Visits* tab screen. The data that will be saved when the user clicks on the yellow "Check In" tile will be the customer's name and number, date, time, and device location coordinates. This will be used for plotting on the *Customer Visits->Map Visits* tab screen.

Green Check Out

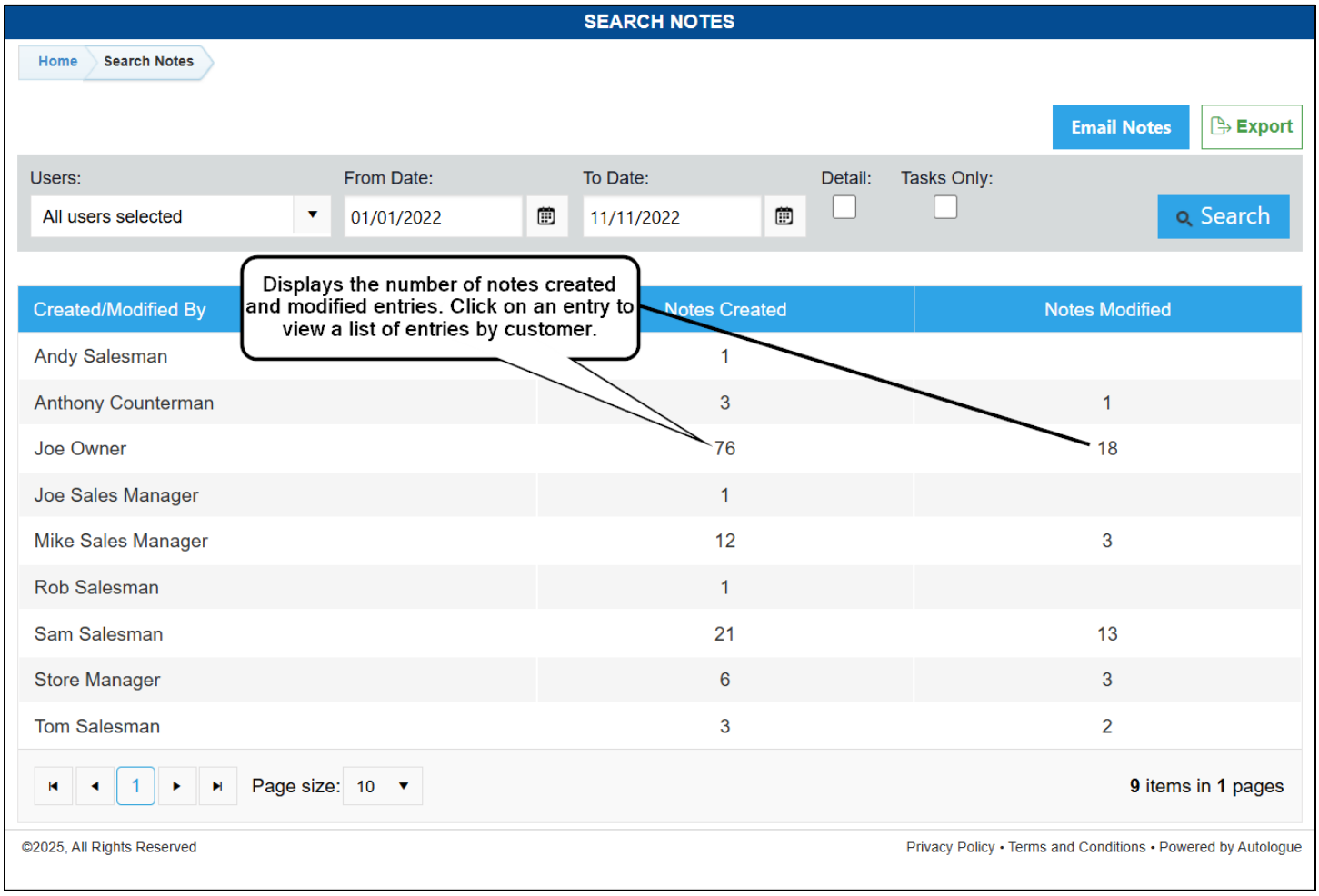
Upon clicking the green "Check Out" tile, an entry will be made within the *Customer Visits->In-Out* tab screen showing a date/time entry under the "Check Out" column. The data that will be saved when the user clicks on the "Checking Out" tile will be the customer's name and number, date, and time. At this time the pinpoint color will be adjusted according to the criteria as described in the *Map Visits* tab section.

Search Notes

- From the store manager's home screen, to search for a note entry, click on the `Search Notes` tile and the following screen will be displayed:



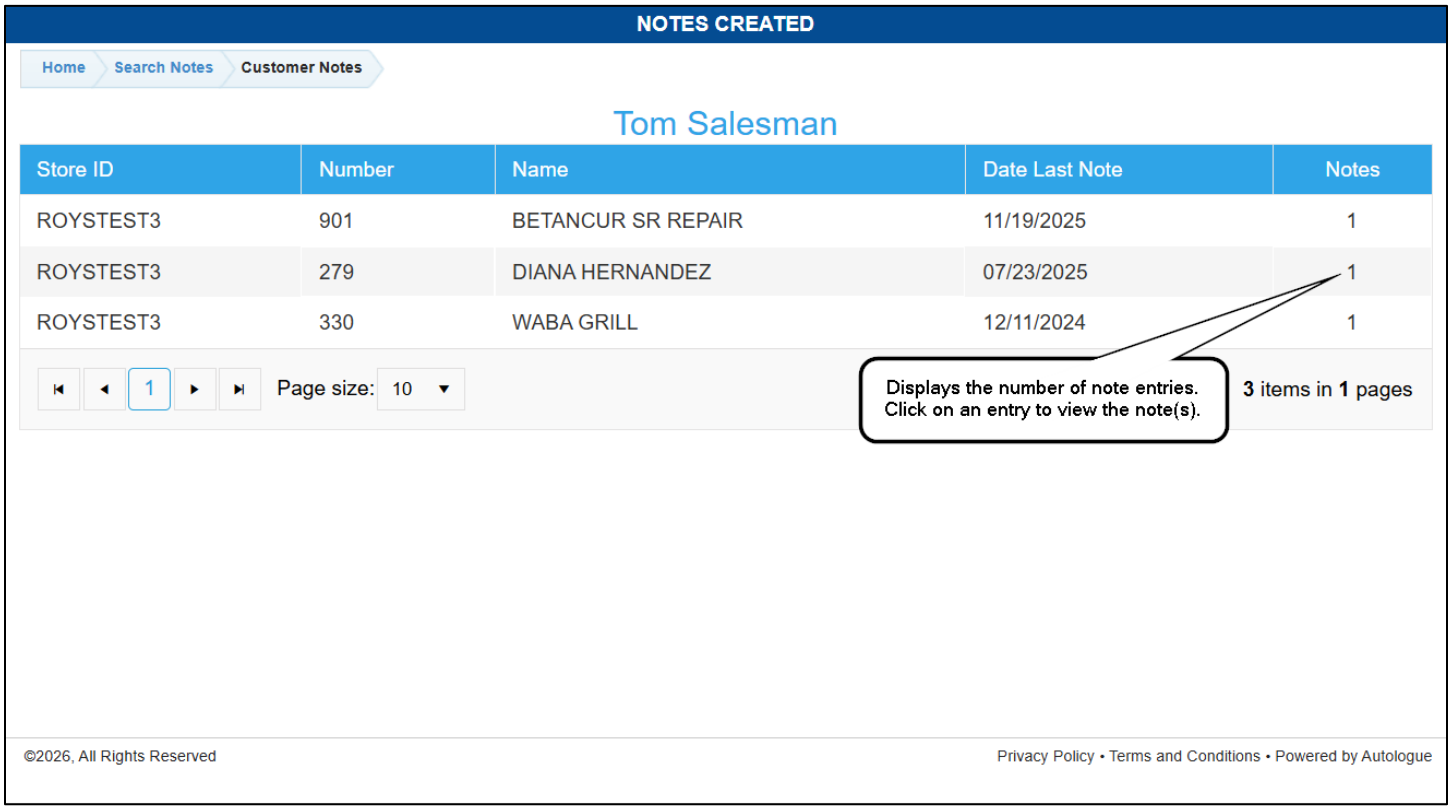
By default, no users are selected and the `From/To` dates will be from 5 days prior to the current date. A user must be selected from the `Users` drop-down, then the `Detail` and/or `Tasks Only` can be checked to display all note detail. If neither box is checked, the screen will display as below. The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



The screen will display `Created/Modified By`, `Notes Created`, and `Notes Modified` columns that lists the users along with the number of notes they created and modified within the date range selected. To drill down and see a list of the specific customers the notes were created/modified for, click on the number.

To see note detail or only notes taken from the task screen, check the `Detail` and/or `Tasks Only` option(s) and click on the blue `Search` button.

- 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 screen will display a listing of store ID, customer number, customer name, date last note, and the number of notes created/modified by the user.

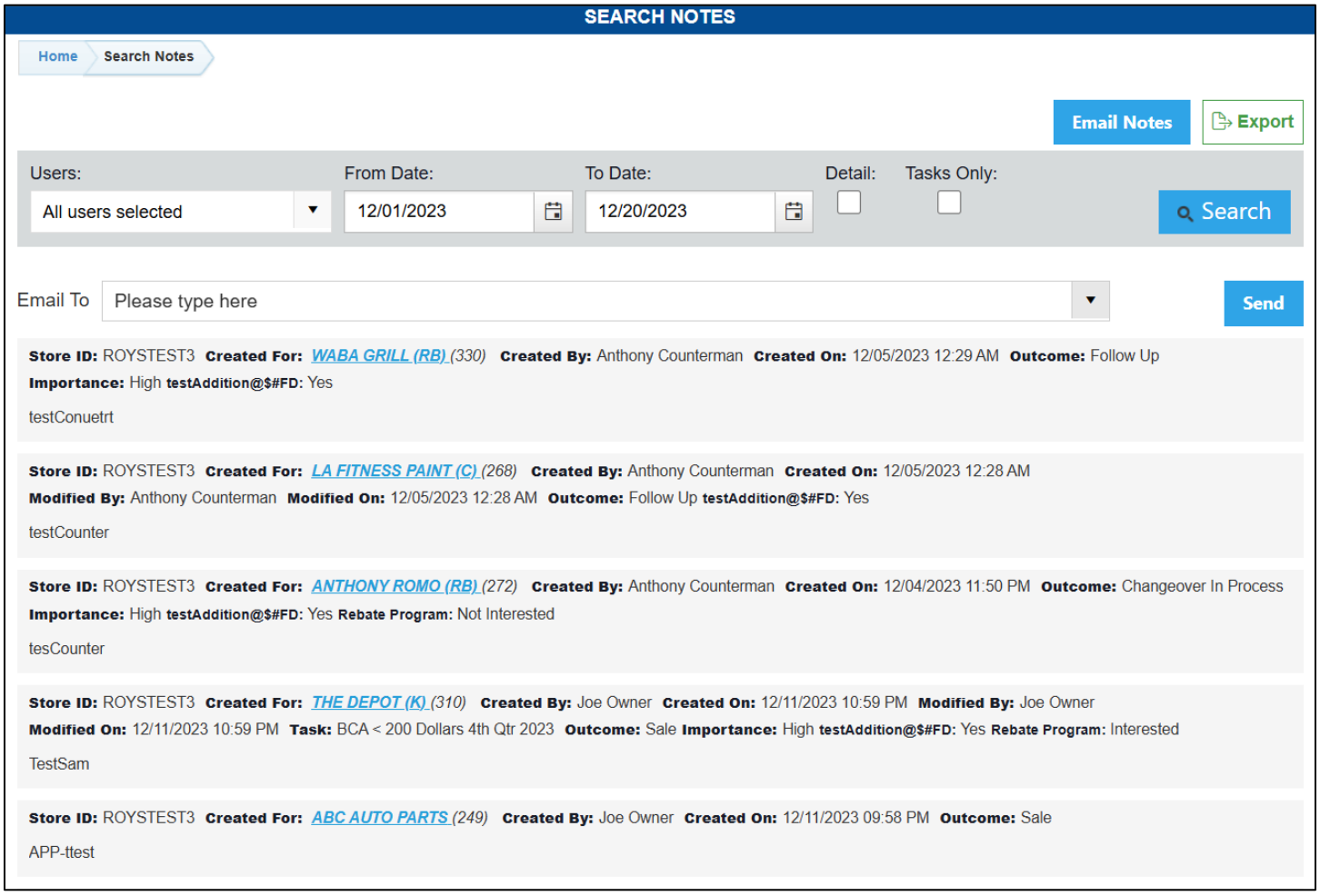
- Click on the number to see the specific note(s).

The note entry displays the actual note, the store ID, 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 `Export` button to save the notes information to an Excel spreadsheet file (*notes_export.xlsx*).

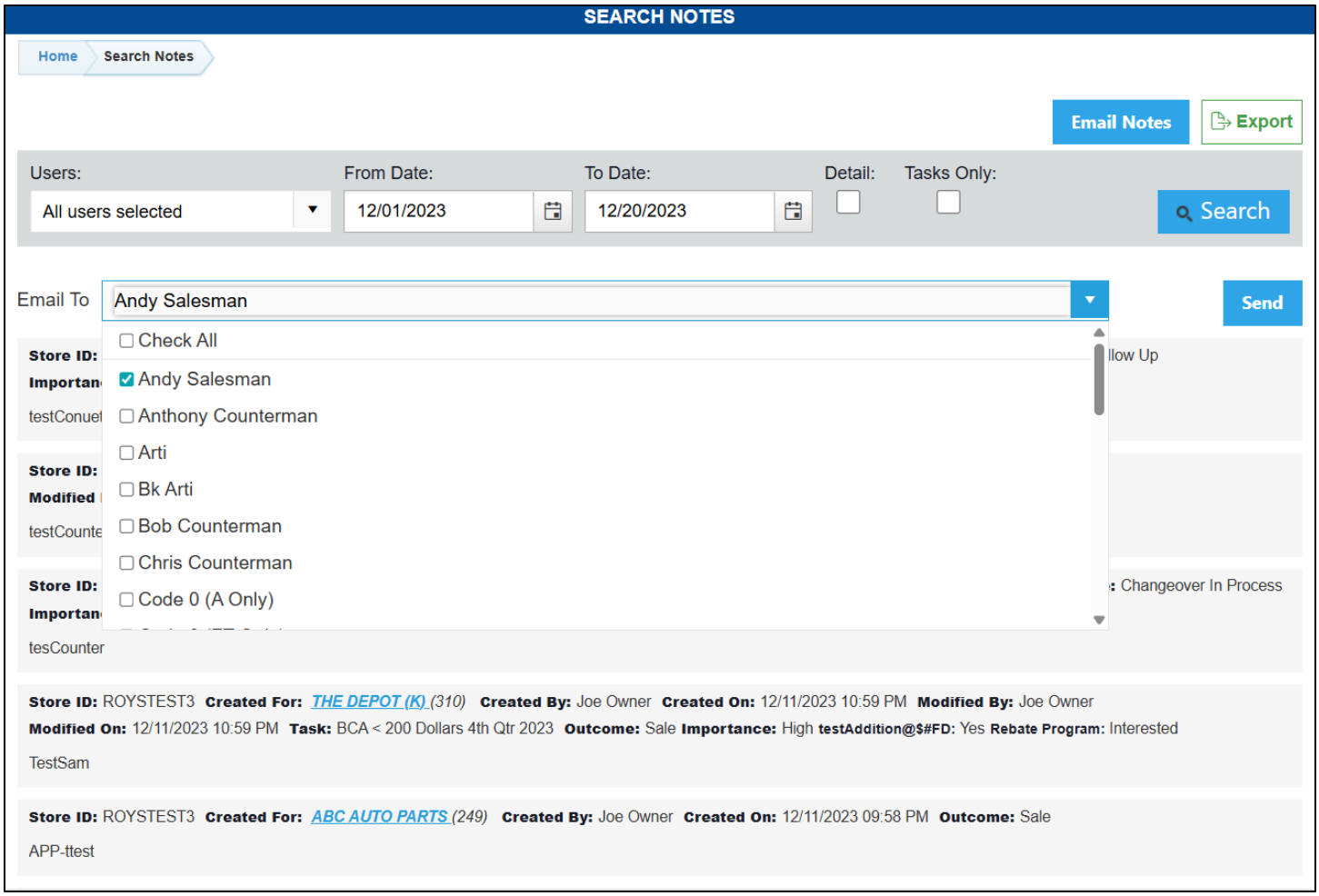
Emailing Search Results

- To have the search results emailed, click on the `Email Notes` button after searching and displaying notes and the following screen will be displayed:

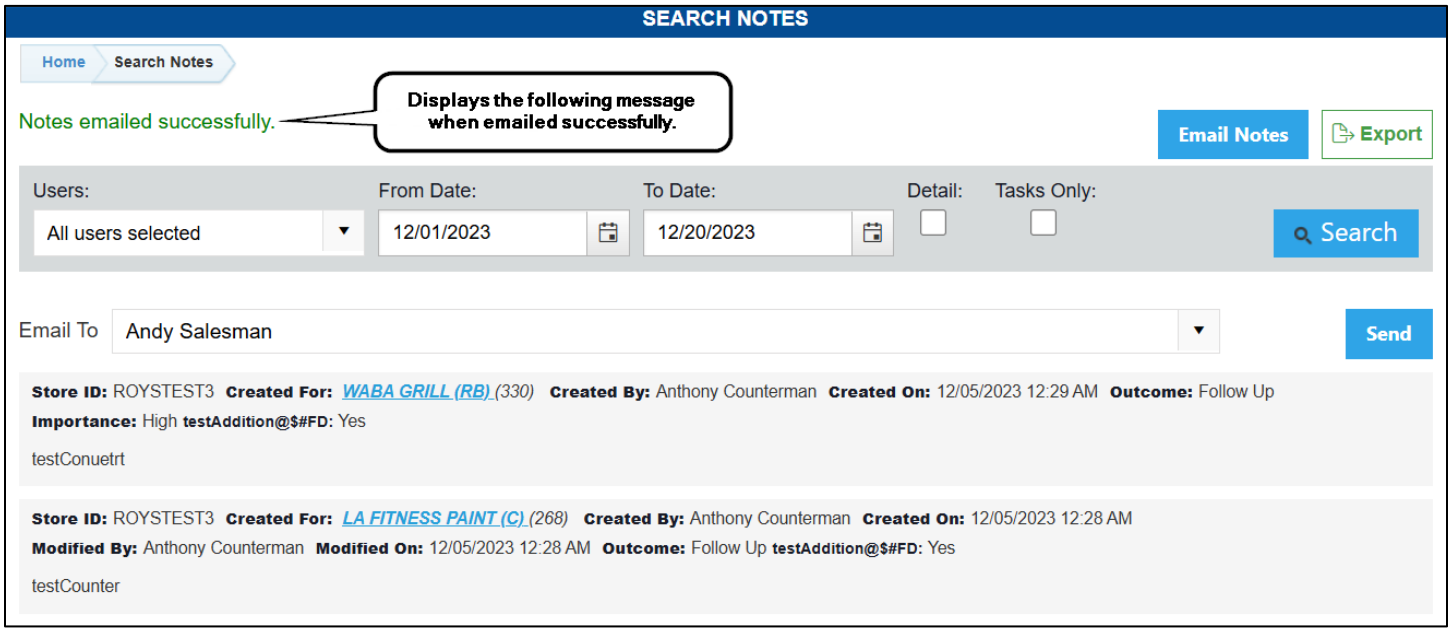


By default, the `Email Notes` button displays the notes information as the email would look.

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

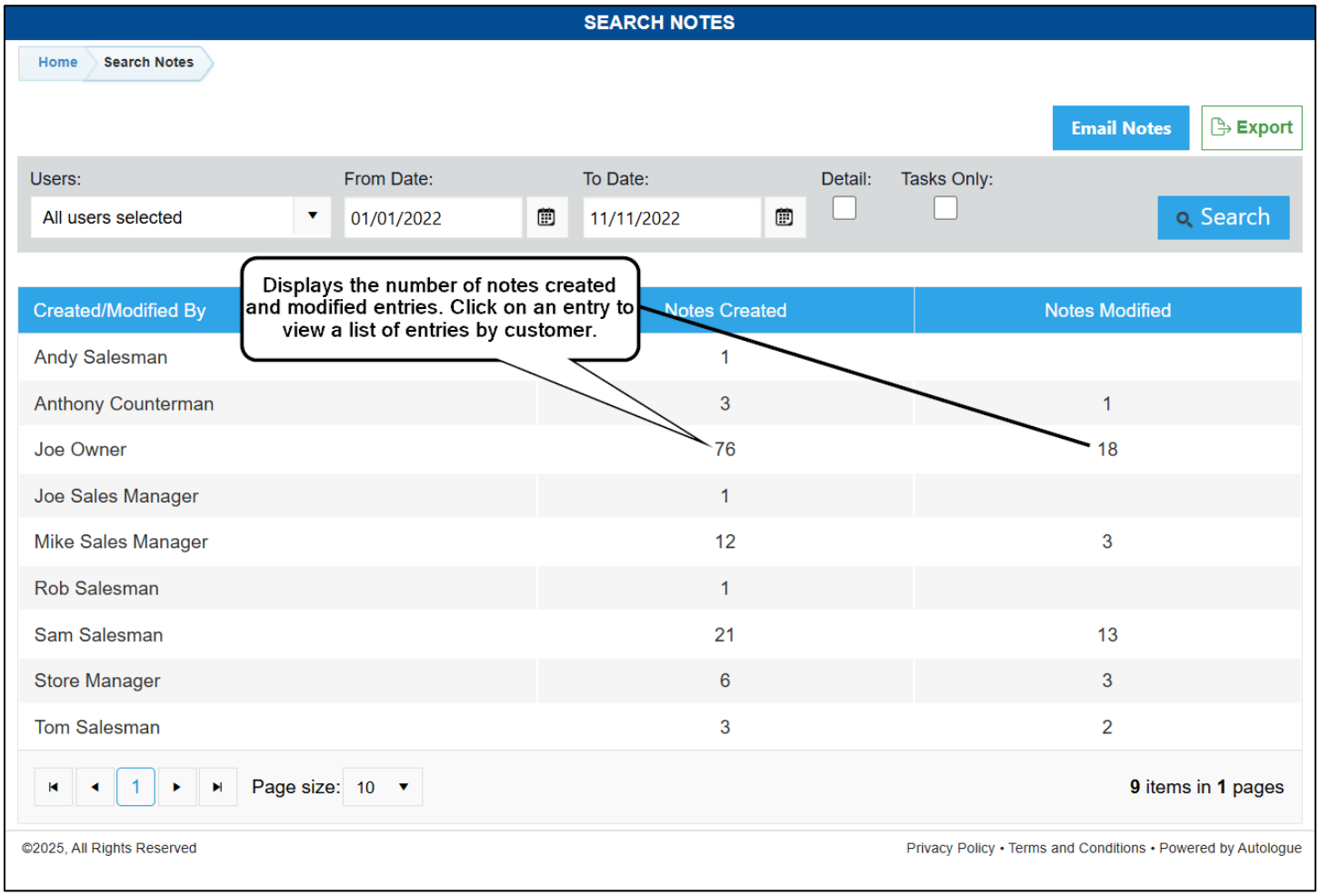


- Once users have been check marked for selection, click on the blue `Send` button, the screen should now display a green *Notes emailed successfully* message as shown:

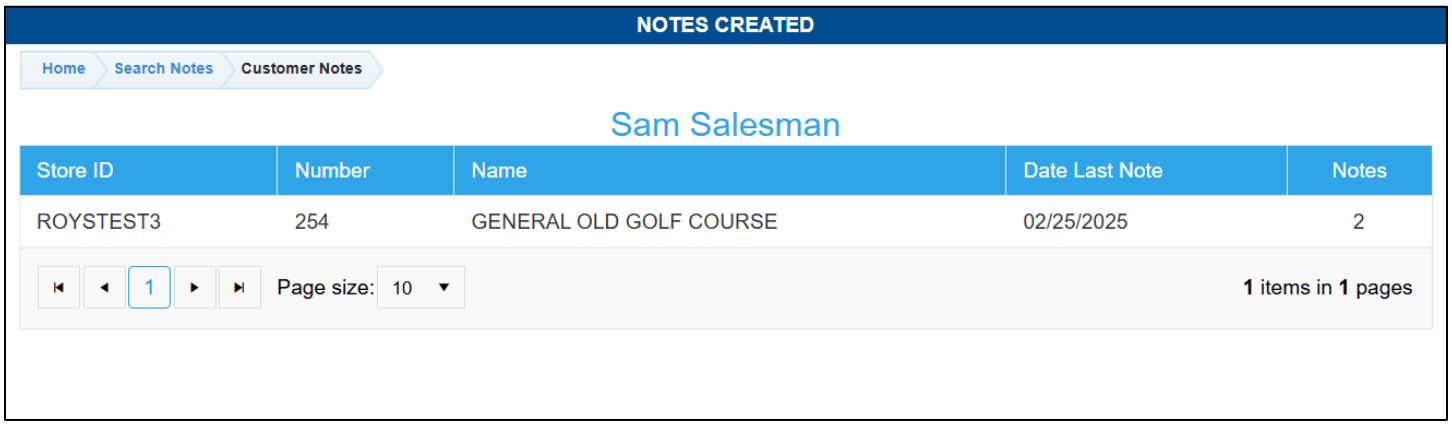


Drilling Down Into Notes

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

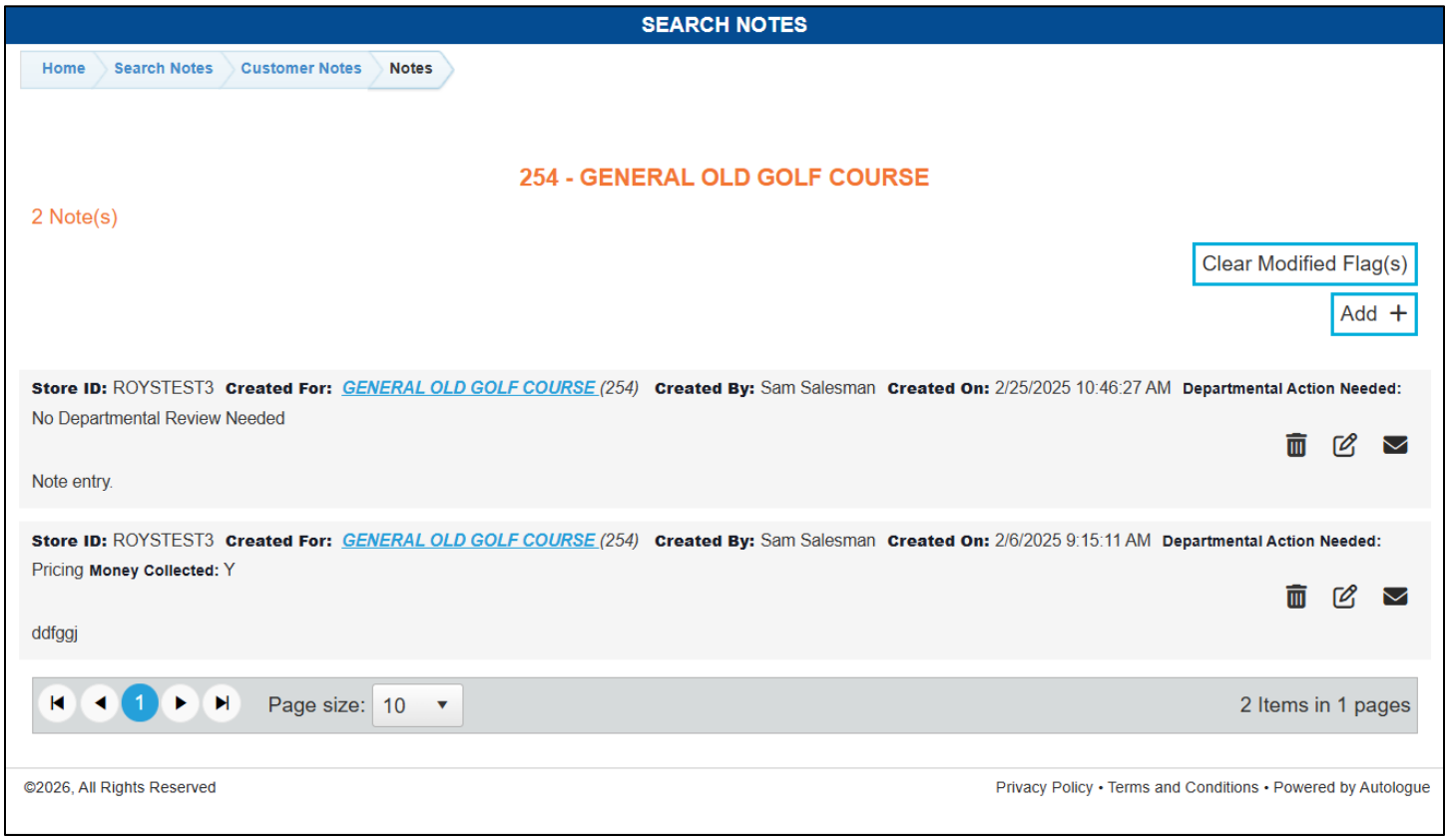


The screen will now display a list of customers along with their assigned store ID, number, date last note, and the number of notes that were created/modified for the customer listed:



To view the note information for the customer, click on the number of notes column to the right of the customer's name.

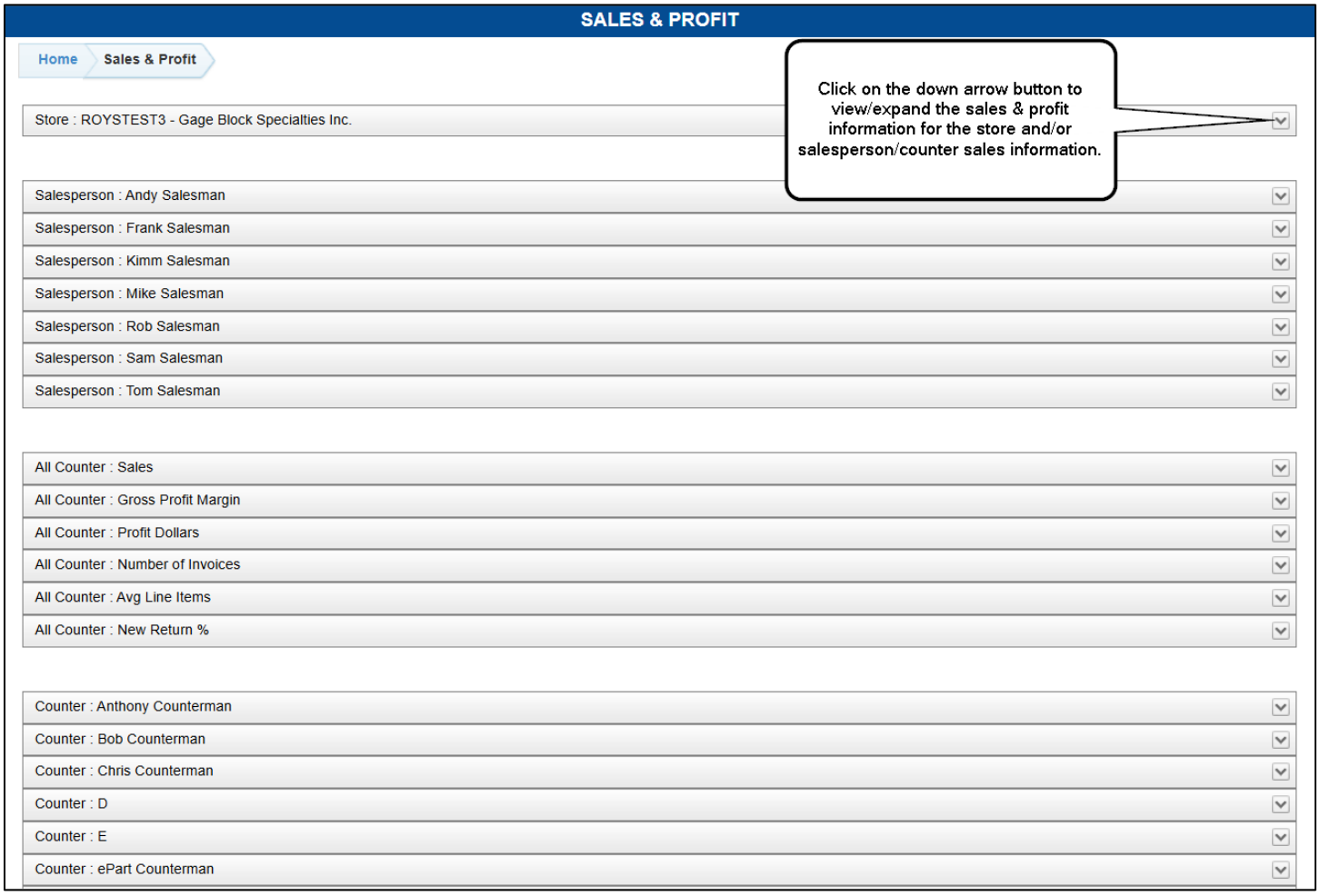
The screen will display the note entry information for each customer as shown:



The customer's store ID, 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.

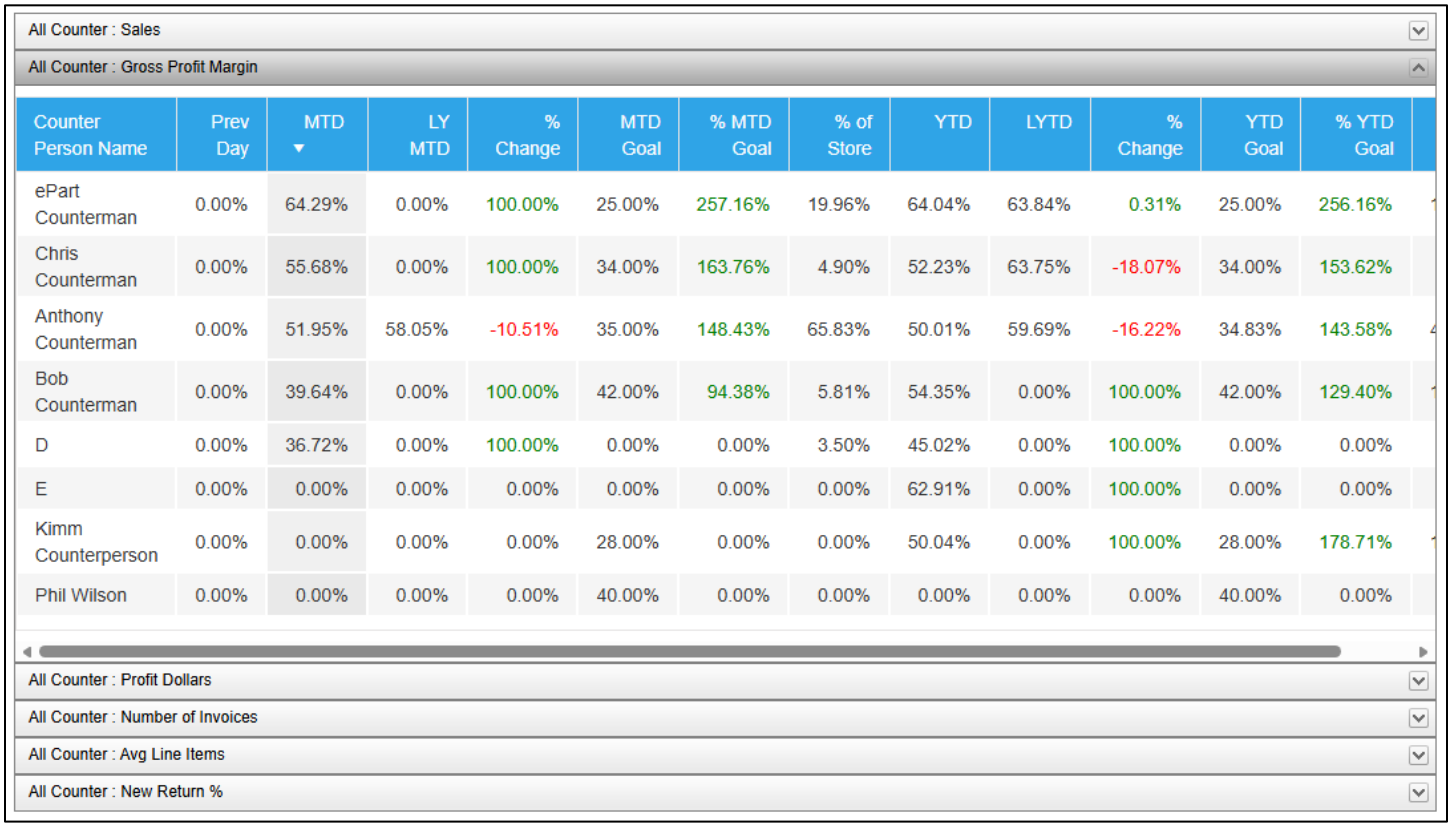
Sales & Profit

- From the store manager's home screen, to view the sales and profit information for the store and/or specific salespersons assigned to customer within this store, click on the `Sales & Profit` button and the following screen will be displayed:



The screen will display a collapsed listing of all assigned salespersons and counter users.

There is a section of "All" listings (i.e. *All Counter: Gross Profit Margin*). This will show the Gross Profit Margin percentages for all countermen in one grid. (See expanded section below):



All Counter : Sales

All Counter : Gross Profit Margin

Counter Person Name	Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal
ePart Counterman	0.00%	64.29%	0.00%	100.00%	25.00%	257.16%	19.96%	64.04%	63.84%	0.31%	25.00%	256.16%
Chris Counterman	0.00%	55.68%	0.00%	100.00%	34.00%	163.76%	4.90%	52.23%	63.75%	-18.07%	34.00%	153.62%
Anthony Counterman	0.00%	51.95%	58.05%	-10.51%	35.00%	148.43%	65.83%	50.01%	59.69%	-16.22%	34.83%	143.58%
Bob Counterman	0.00%	39.64%	0.00%	100.00%	42.00%	94.38%	5.81%	54.35%	0.00%	100.00%	42.00%	129.40%
D	0.00%	36.72%	0.00%	100.00%	0.00%	0.00%	3.50%	45.02%	0.00%	100.00%	0.00%	0.00%
E	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	62.91%	0.00%	100.00%	0.00%	0.00%
Kimm Counterperson	0.00%	0.00%	0.00%	0.00%	28.00%	0.00%	0.00%	50.04%	0.00%	100.00%	28.00%	178.71%
Phil Wilson	0.00%	0.00%	0.00%	0.00%	40.00%	0.00%	0.00%	0.00%	0.00%	0.00%	40.00%	0.00%

All Counter : Profit Dollars

All Counter : Number of Invoices

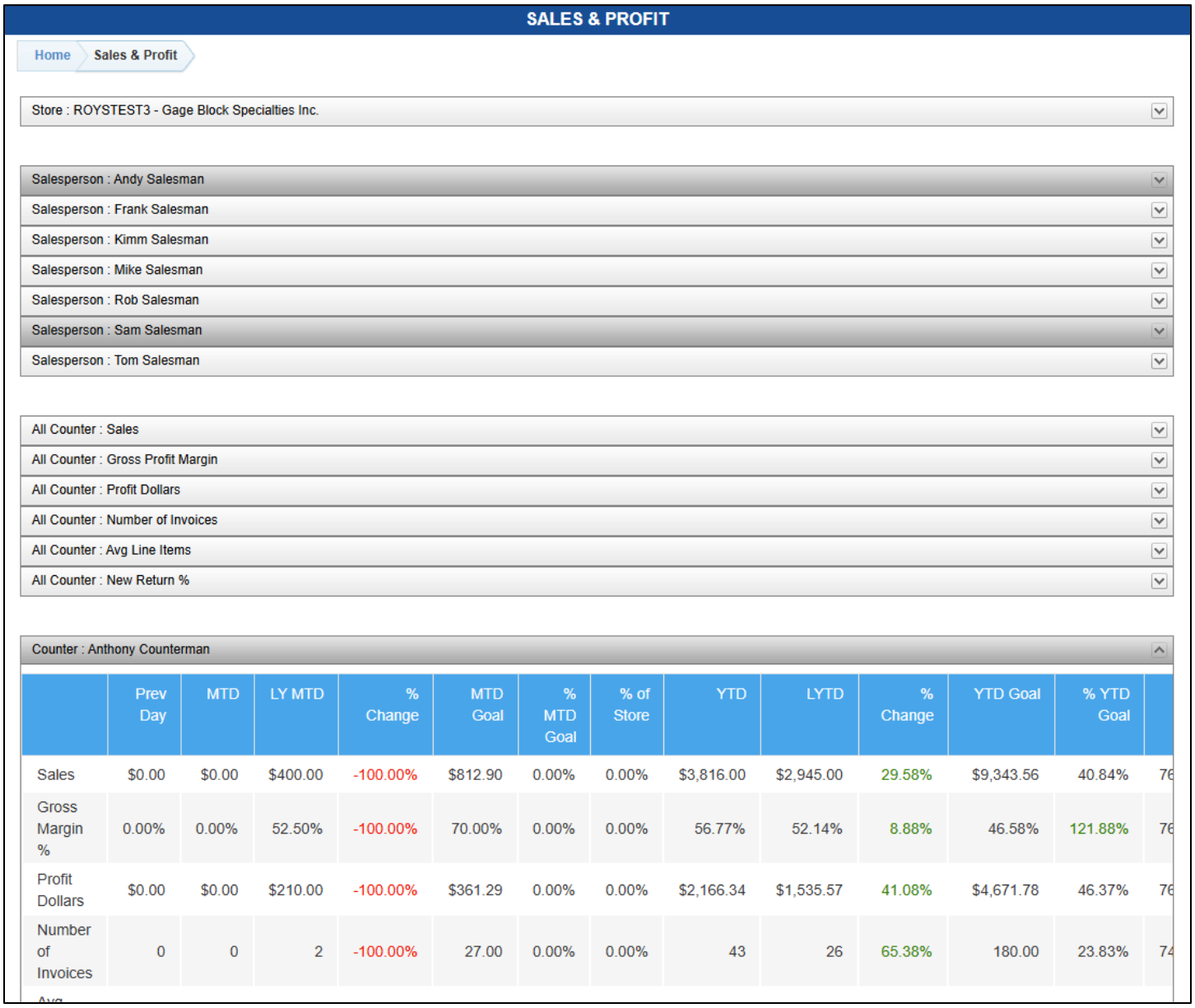
All Counter : Avg Line Items

All Counter : New Return %

- Clicking on a column header (i.e. *MTD*) will arrange the users from low to high or high to low, allowing the best performer to be identified.

Explanding/Viewing The Sales & Profit Information

- You can display/expand the sales and profit information for any of the assigned salesperson and/or counter users by clicking on the heading bar or down-arrow button at the end of the specific salesperson/counter user as shown:



	Prev Day	MTD	LY MTD	% Change	MTD Goal	% MTD Goal	% of Store	YTD	LYTD	% Change	YTD Goal	% YTD Goal	
Sales	$0.00	$0.00	$400.00	-100.00%	$812.90	0.00%	0.00%	$3,816.00	$2,945.00	29.58%	$9,343.56	40.84%	76
Gross Margin %	0.00%	0.00%	52.50%	-100.00%	70.00%	0.00%	0.00%	56.77%	52.14%	8.88%	46.58%	121.88%	76
Profit Dollars	$0.00	$0.00	$210.00	-100.00%	$361.29	0.00%	0.00%	$2,166.34	$1,535.57	41.08%	$4,671.78	46.37%	76
Number of Invoices	0	0	2	-100.00%	27.00	0.00%	0.00%	43	26	65.38%	180.00	23.83%	74
Avg													

The screen will now display the expanded view of sales & profit information for the specific counterperson(s) whose arrow buttons were clicked on.

Collapsing The Sales & Profit Information

The viewing of sales & profit information can be removed/collapsed from being viewed by clicking on the heading bar or up-arrow buttons.

Reports

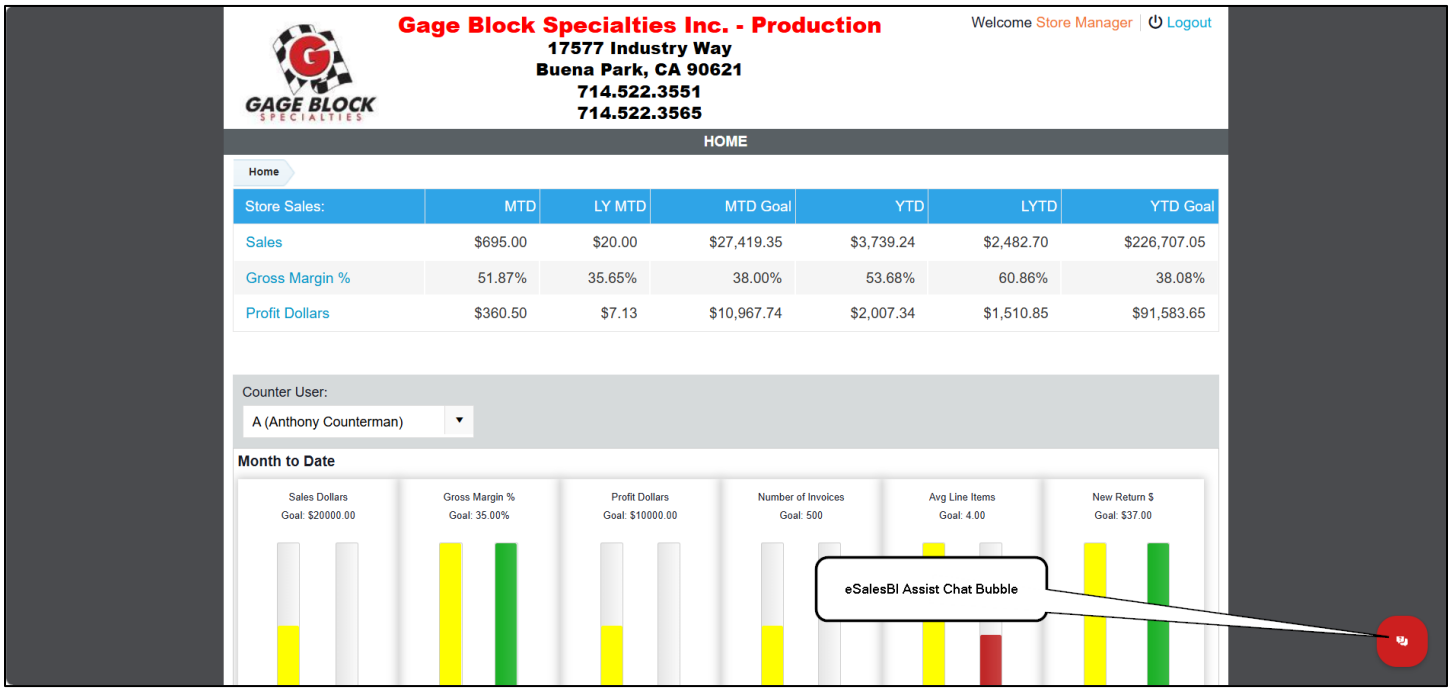
If enabled, this tile will display a list of AutoCube Power BI Reports that have been published and enabled for your specific user role.

☞ **Note: When the `Reports` tile has only a single report listed, it will automatically select it so it displays immediately. If multiple reports are listed, it will display the listing of reports on the screen as it normally would and the user would have to manually select the desired report.**

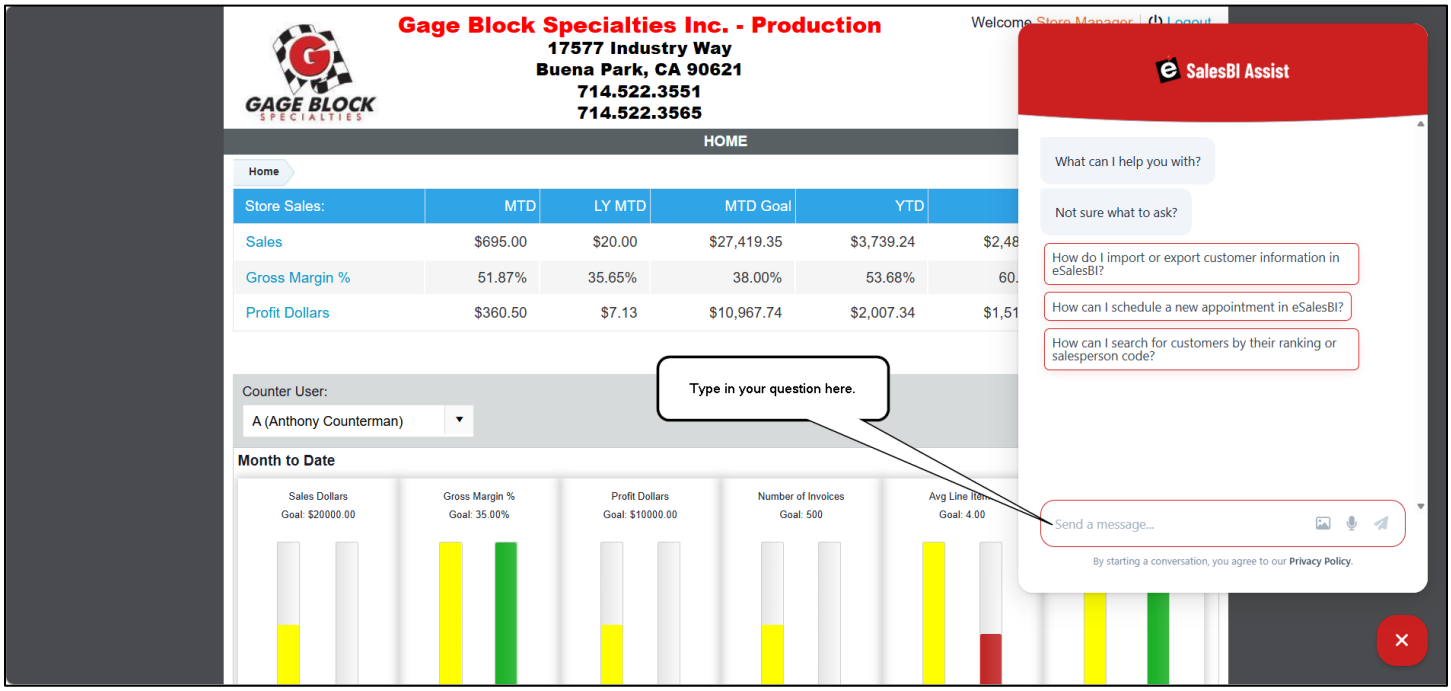
eSalesBI Assist Chat Bubble

The eSalesBI Assist chat bubble is an interactive help tool built into the application, designed to answer questions and provide guidance without leaving your workspace. A floating chat bubble appears in the right side of the screen and remains visible as you move through the application. You can expand or minimize it at any time, and your conversation will persist for the duration of your session. You can use it to ask questions such as *"add a note"* or *"reset password."* You can also ask follow-up questions or request clarification, just like you would when chatting with other AI programs such as ChatGPT. The chat bubble requires a modern browser (recent versions of Chrome, Edge, Firefox, or Safari) and may not appear in older or unsupported web browser versions.

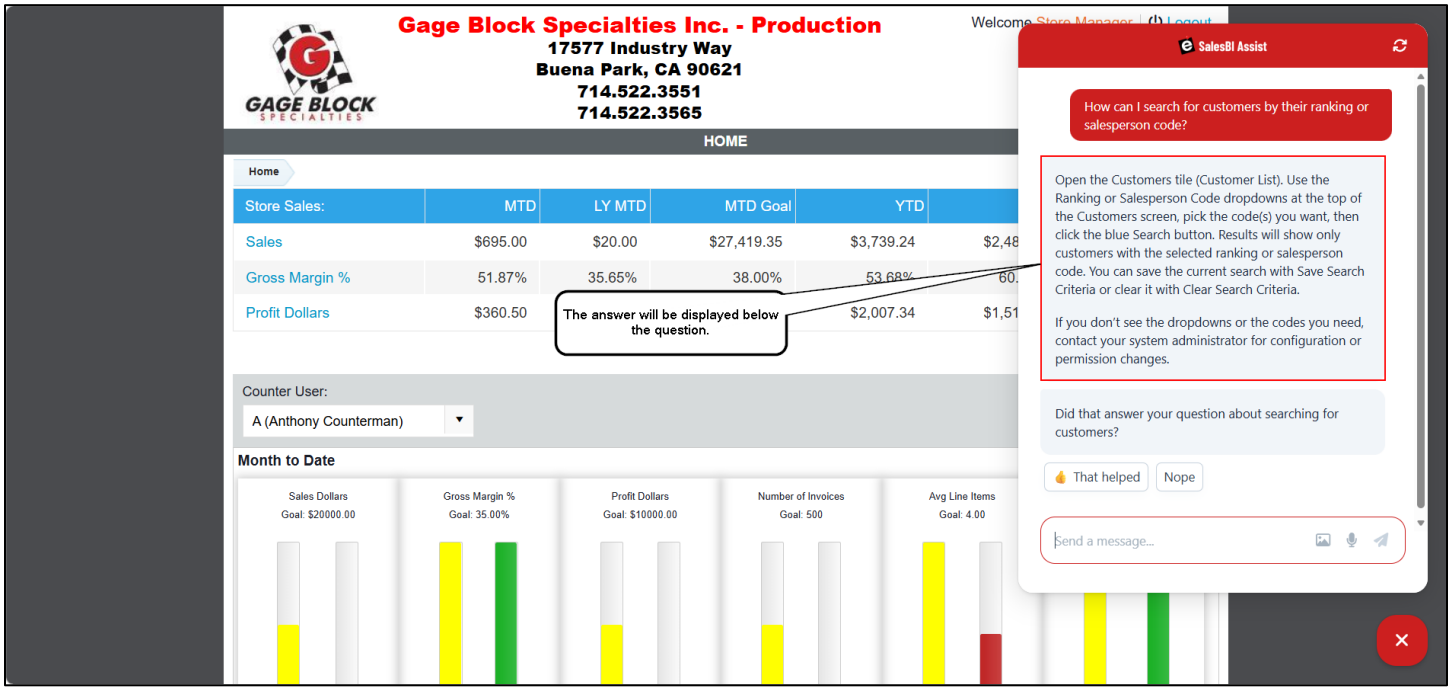
- To ask a question, click on the red eSalesBI Assist chat bubble as shown below:



The chat bubble will open as shown:



- Click within the *Send a message* field, type in a question, then click on the red arrow button to see the response to the question.



- Click on red x chat bubble to close the eSalesBI Assist pop-up window.