

Dynamic Sales Insights for Epicor BisTrack

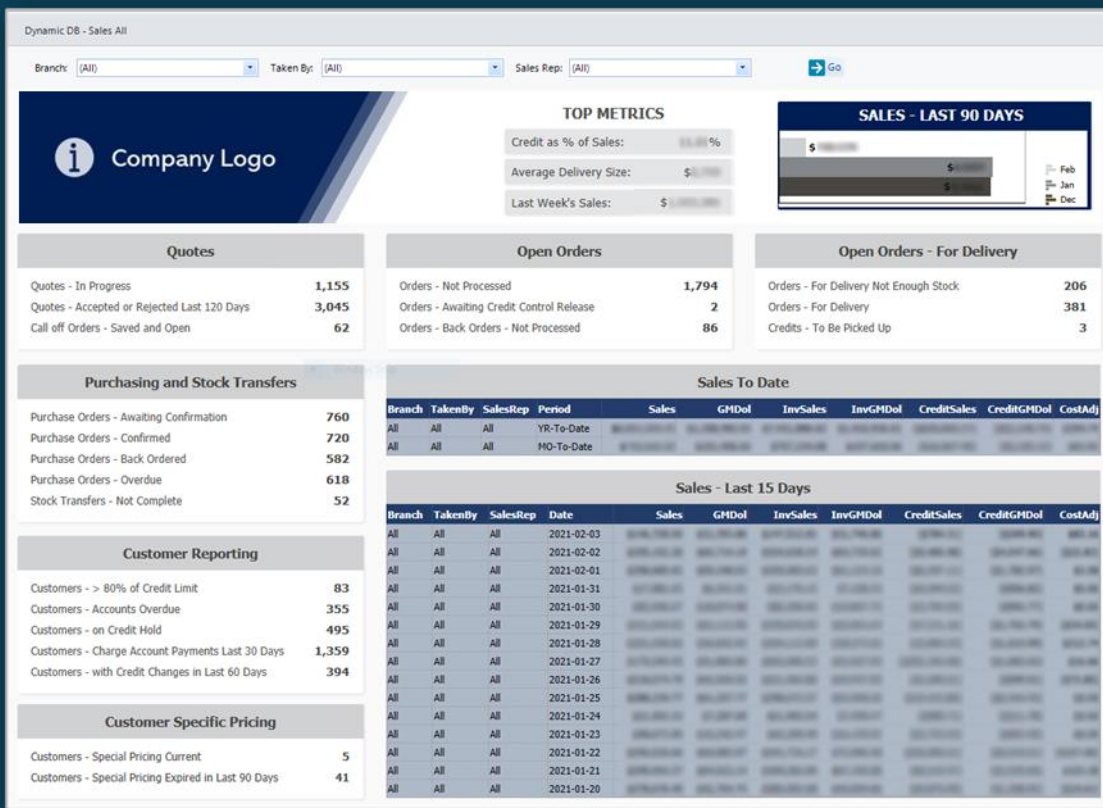
Bring all your critical sales metrics into a single dashboard, with dynamic filtering and drillable smartviews.

Dropdown menu

See all actionable data or focus on a specific branch, user or sales rep with dynamic filtering.

Top metrics

Be proactive with real-time snapshots of critical sales performance indicators.



The dashboard displays a comprehensive overview of sales data. At the top, there are filters for Branch, Taken By, and Sales Rep, all set to '(All)'. A 'Go' button is located to the right of these filters. Below the filters, the dashboard is divided into several sections:

- Company Logo:** A placeholder for the company logo.
- TOP METRICS:** A summary of key performance indicators:
 - Credit as % of Sales: 13.86%
 - Average Delivery Size: \$1,000
 - Last Week's Sales: \$1,000,000
- SALES - LAST 90 DAYS:** A bar chart showing sales trends over the last 90 days, with a legend for months (Feb, Jan, Dec).
- Quotes:** A summary of quote statuses:
 - Quotes - In Progress: 1,155
 - Quotes - Accepted or Rejected Last 120 Days: 3,045
 - Call off Orders - Saved and Open: 62
- Open Orders:** A summary of open order statuses:
 - Orders - Not Processed: 1,794
 - Orders - Awaiting Credit Control Release: 2
 - Orders - Back Orders - Not Processed: 86
- Open Orders - For Delivery:** A summary of orders ready for delivery:
 - Orders - For Delivery Not Enough Stock: 206
 - Orders - For Delivery: 381
 - Credits - To Be Picked Up: 3
- Purchasing and Stock Transfers:** A summary of purchasing activities:
 - Purchase Orders - Awaiting Confirmation: 760
 - Purchase Orders - Confirmed: 720
 - Purchase Orders - Back Ordered: 582
 - Purchase Orders - Overdue: 618
 - Stock Transfers - Not Complete: 52
- Customer Reporting:** A summary of customer-related metrics:
 - Customers - > 80% of Credit Limit: 83
 - Customers - Accounts Overdue: 355
 - Customers - on Credit Hold: 495
 - Customers - Charge Account Payments Last 30 Days: 1,359
 - Customers - with Credit Changes in Last 60 Days: 394
- Customer Specific Pricing:** A summary of pricing activities:
 - Customers - Special Pricing Current: 5
 - Customers - Special Pricing Expired in Last 90 Days: 41
- Sales To Date:** A table showing sales performance by branch and sales rep over time. The table has columns for Branch, TakenBy, SalesRep, Period, Sales, GMDol, InvSales, InvGMDol, CreditSales, CreditGMDol, and CostAdj.
- Sales - Last 15 Days:** A table showing sales performance by branch and sales rep for the last 15 days. The table has columns for Branch, TakenBy, SalesRep, Date, Sales, GMDol, InvSales, InvGMDol, CreditSales, CreditGMDol, and CostAdj.

20+ smartviews

Drill down on detailed views to support user workflows and enhanced analysis.

360 degree sales views

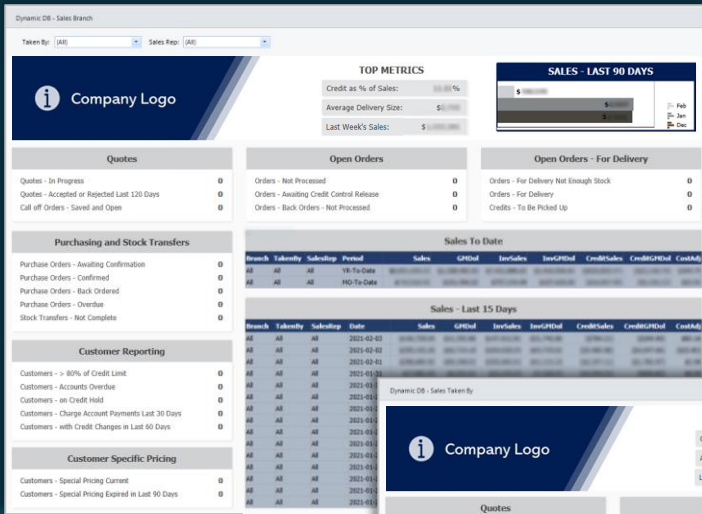
Gain insights on quotes, orders, purchasing, customer accounts and much more.

Sales Insights Personalized for Every User

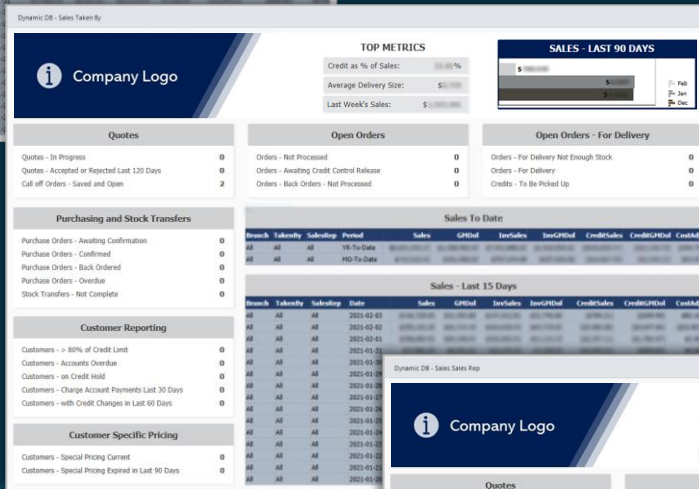
Choose from a variety of role-specific dashboards to provide your sales staff with actionable reporting tailored to each position.

Branch Specific

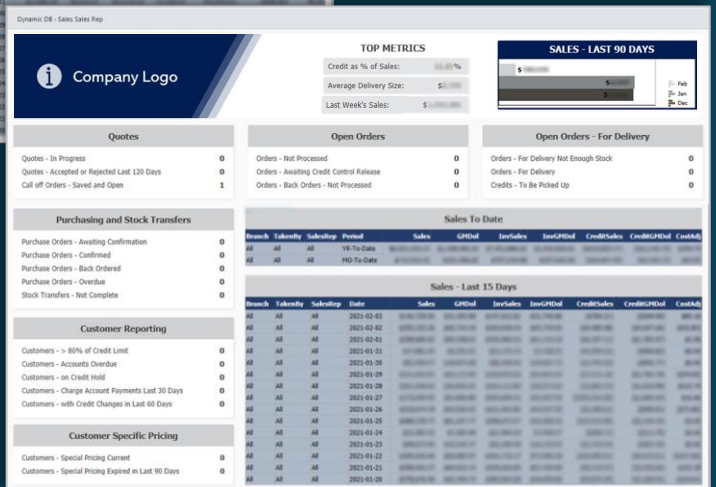
Enable users to view sales numbers, quotes and order information at the branch level.



User Specific
Give users a focused view of their sales orders based on the 'Taken By' or 'Created By' fields.



Sales Rep Specific
Provide each sales rep with a customized view of their sales orders and customer accounts.



To learn more, please contact us via www.lbmpartnerservices.com.