Account Executive Dashboard

Quick Guide

May, 2016

Explanation of AE Dashboard charts and tables

Most Dashboard charts are fully interactive. You can hover the mouse (or single tap for tablets or phones) to get more details on a given data point/column/pie slice.

You can also click (or double tap for tablets or phones) on most data points/columns/pie slices to get a listing of the orders that make up the data for that particular data point/column/pie slice.

The explanation below describes what criteria are used to obtain the list of orders. You can duplicate this manually in the Orders module and get the same results.

Explanation of AE Dashboard charts and tables

MY OPEN ORDERS & PROPOSALS

Chart	Criteria
Orders	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: **-- to current date** Reached status between: **-- to current date** In-hands date between: **-- to --**
Proposals	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** **Proposal** Created between: **-- to current date** Reached status between: **-- to current date** In-hands date between: **-- to --**

Explanation of AE Dashboard charts and tables

MY INVOICED ORDERS BY PERIOD

Column	Criteria
MTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: current month start to current date In-hands date between: -- to --
QTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: current quarter start to current date. Quarters are Jan-Mar (Q1), Apr-Jun (Q2), Jul-Sep (Q3), Oct-Dec (Q4). In-hands date between: -- to --
YTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: current year start to current date. In-hands date between: -- to --

Explanation of AE Dashboard charts and tables

Column	Criteria
LYTD	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: one year back from now to current date. In-hands date between: -- to --

Explanation of AE Dashboard charts and tables

MY INVOICED ORDERS BY PAST 12 MONTHS

Each column, when clicked (or double-tapped), will produce a list of orders corresponding to the amounts shown for that month.

Criteria:

Order Status: **"Invoiced"**

Orders created at front end **Web Stores**
Orders created in the **Back Office**

Created between: **-- to current date**

Reached status between: **selected month start to selected month end**.

In-hands date between: **-- to --**

Explanation of AE Dashboard charts and tables

MY RECEIVABLES

Pie Slice	Criteria
0-29 days	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Current date minus 29 days to current date In-hands date between: -- to --
30-59 days	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Current date minus 59 days to current date minus 30days In-hands date between: -- to --
60-89 days	Order status: **"Invoiced"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: Current date minus 89 days to current date minus 60 days In-hands date between: -- to --

Explanation of AE Dashboard charts and tables

Pie Slice	Criteria
90 days+	Order status: "Invoiced" Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: -- to current date minus 90days In-hands date between: -- to --

Explanation of AE Dashboard charts and tables

ORDER STATUS BASED ON IN HANDS DATE

Pie Slice	Criteria
Open	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: -- to current date In-hands date between: -- to --
In-hands Today	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: -- to current date In-hands date between: current date to current date

Explanation of AE Dashboard charts and tables

Pie Slice	Criteria
In-hands this week	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: -- to current date In-hands date between: current week Monday to current week Sunday
Overdue	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: -- to current date In-hands date between: -- to Yesterday
Credit Hold	No conditions for now.

Explanation of AE Dashboard charts and tables

Pie Slice	Criteria
Needs Attention	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** Orders created at front end **Web Stores** Orders created in the **Back Office** Created between: -- to current date Reached status between: -- to current date In-hands date between: -- to --

Explanation of AE Dashboard charts and tables

PROPOSAL STATUS

Pie Slice	Criteria
Open	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** **Proposal** Created between: -- to current date Reached status between: -- to current date In-hands date between: -- to --
Due Today	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** **Proposal** Created between: -- to current date Reached status between: -- to current date In-hands date between: current date to current date

Explanation of AE Dashboard charts and tables

Pie Slice	Criteria
Due this week	Order Status: • **"New Order"** • **"Pending Approval"** • **"In Process"** • **"Ready to be invoiced"** • **"Shipped"** **Proposal** Created between: -- to current date Reached status between: -- to current date In-hands date between: current week Monday to current week Sunday
Cancelled last week	Order status: **"Cancelled"** **Proposal** Created between: -- to current date Reached status between: last week Monday to last week Sunday In-hands date between: -- to --
Cancelled last month	Order status: **"Cancelled"** **Proposal** Created between: -- to current date Reached status between: last month start to last month end In-hands date between: -- to --

Explanation of AE Dashboard charts and tables

Pie Slice	Criteria
Cancelled	Order status: **"Cancelled"** **Proposal** Created between: -- to current date Reached status between: -- to current date In-hands date between: -- to --