E360

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Introduction

Welcome to E360.

This comprehensive tool allows you to view your Evolution data in several easy to use formats; and includes the ability to create and save custom queries of your data.
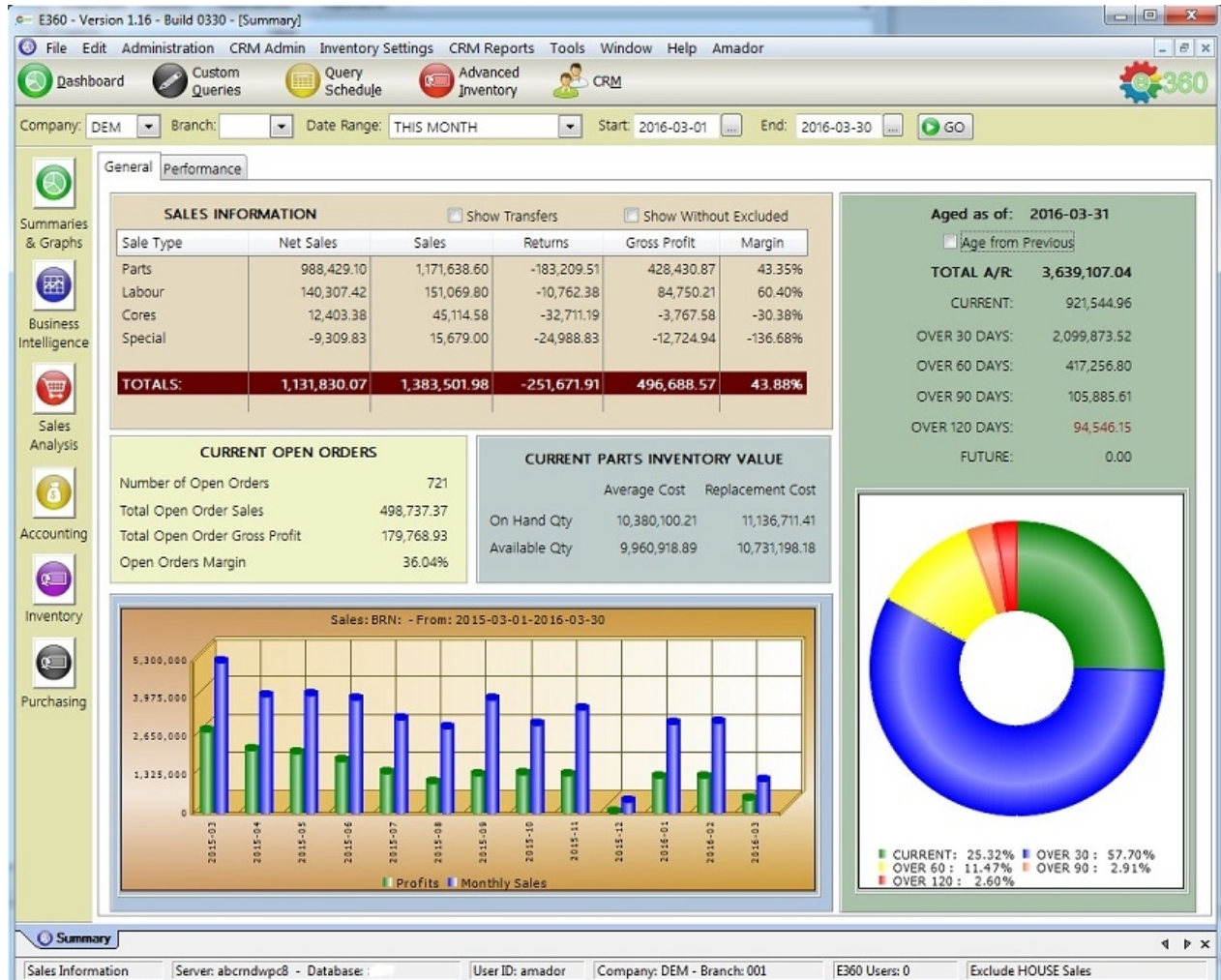
Welcome

Welcome to Evolution 360.

E360 is a dashboard, custom reporting tool, and CRM for AutoPoint Evolution

Data is exported on a nightly basis and imported into a PostgreSQL database.

This data is then read by E360 and formatted in various ways in order to produce graphs, reports, and drill-down style lists.

If you have any questions regarding the product; please contact Amador Business Computers at: 1-888-826-2367.

You can also send an email to our support department: support@amador.ca

You can also contact via our website: http://www.amador.ca

What's new

Version 1.16 - Build 0705
BUG FIX: CRM - My Notes - Not responding to date selection changes
BUG FIX: BI - Branch Sales - not always refreshing correctly when the toolbar date is changed
BUG FIX: BI - Sales by Counterman - not always refreshing correctly when the toolbar date is changed
BUG FIX: BI - Sales by Salesperson - not always refreshing correctly when the toolbar date is changed
BUG FIX: BI - Products -> Customer - not always refreshing correctly when the toolbar date is changed
BUG FIX: BI - Top 20 Product Sales - not always refreshing correctly when the toolbar date is changed
BUG FIX: Cancel button on status window not working
BUG FIX: Advanced Inventory - Exclude "discontinued" items from Min/Max calculations
BUG FIX: CRM - Customer List not always refreshing properly when the company is changed in the toolbar
BUG FIX: CRM - Admin Reports - CRM Customer Sales vs. Goals - not filtering properly by company
CHANGE: Modified the list resizing in some browses for better performance
CHANGE: Inventory Turns - Use current_line_abbrev and current_part_number
ENHANCEMENT: CRM - My Notes - Added calendar lookup buttons
ENHANCEMENT: CRM - My Notes - Improved speed
ENHANCEMENT: Top 10 graphs changed to single value bar graphs
ENHANCEMENT: Item Analysis (renamed from Inventory Sales)
          - Expanded to allow viewing inventory sales, back orders, special backorders, overrides, buyouts, and lost sales.
              - Add new filters in order to allow building the sales information for inventory items
              - Inventory list now has branch information; qty-available and qty-on-order

Version 1.16 - Build 0602
BUG FIX: CRM - Tagging a customer can result in it showing up as a duplicate customer (Cosmetic only)
BUG FIX: Don't export blank dates to Excel from Custom Queries
BUG FIX: Salesman Analysis - Cosmetic - Title being cut short
BUG FIX: CRM Reports - Browse All Customer Notes - Exporting to Excel cuts off the note at the first CR/LF
ENHANCEMENT: CRM Reports - Browse All Customer Notes - Add Date filtering
ENHANCEMENT: Add totals to the Customers' A/R in CRM

Version 1.16 - Build 0512
BUG FIX: Custom Queries - List of queries only showing queries for specific users
BUG FIX: Custom Queries - Saving a condition with just a start date was not being allowed
BUG FIX: Custom Queries - Using a start date with a condition (LESS THAN / GREATER THAN) was not using a properly formatted date
CHANGE: Added Extension to Contact list on main CRM page

Version 1.16 - Build 0511
BUG FIX: Custom Queries - When a query is run, the Status Window should not show a second "Cancel" button
CHANGE: Custom Queries - Don't disable "Distinct" flag when filtering a query column
ENHANCEMENT: Accounting - New Income Statement (Custom Income) that allows for excluded accounts
ENHANCEMENT: CRM - A/R details

- Added new Group Security setting to show customer AR in the CRM
ENHANCEMENT: Change to Admin Menus to allow for CRM Only access
ENHANCEMENT: New "Multi-Add Note" button - Add many notes; pick customer within the note.
ENHANCEMENT: BI - Sales by Counterman - Add "Total Invoices" count
ENHANCEMENT: Accounting - Add Customer Assigned Branch, Customer Salesman, and Credit Manager to A/R drill down
      - You can filter on these options - CTRL-F
ENHANCEMENT: Custom Query - New Custom Query table - view_aging_list
ENHANCEMENT: Added "Save As" button in Advanced Inventory so existing filters could be modified and saved as a new filter
ENHANCEMENT: Better Font scaling in Advanced Inventory
ENHANCEMENT: Better font scaling in Accounts Receivable drill down

Version 1.16 - Build 0503
BUG FIX: Sales by Product - Second drill level not always getting the product line description correctly

Query Scheduler
BUG FIX: TLS encryption not working correctly at some sites

Version 1.16 - Build 0428
CHANGE: Admin Settings - Added more authentication options for email (TLS)
EHANCEMENT: Business Intelligence - Sales by Counterman - Added "Invoice Count" to the first two drill levels
      - once you are showing by individual invoice, the count is superfluous

Version 1.16 - Build 0425
CHANGE: Email options - add authenticated login option for scheduler

Query Scheduler
Add authenticated login method

Version 1.16 - Build 0421
BUG FIX: Filter (find) on Saved Queries not working correctly
BUG FIX: Filter (find) on Scheduled Queries not working correctly
BUG FIX: Adding a new Query to the scheduler would not allow you to immediately add a schedule
CHANGE: Added column types to a new table to scheduled queries to help during exports using the schedule

Query Scheduler
Change: Detection of numeric and date column types for better exporting to Excel
      * Please note - This requires you go into your Scheduled queries; and save each one so the field types are saved

Version 1.16 - Build 0414
BUG FIX: Query Schedule could freeze under certain circumstances
CHANGE: Added security settings to the User Groups for the new graphs
ENHANCEMENT: New Graph - Top 10 Product Suppliers - Dashboard
ENHANCEMENT: New Graph - Top 10 Product Line purchases - Dashboard

QueryScheduler
BUG FIX: Scheduled query with no results would result in a corrupted excel file
CHANGE: Modified the QuerySchedule engine to remove illegal characters from its file name

Version 1.16 - Build 0412

BUG FIX: Cosmetic - Main Dashboard - Not always refreshing correctly
BUG FIX: Cosmetic - Status Window not closing properly under all circumstances
CHANGE: Removed the "Maintenance is required - running now" Message that waited for OK - Replaced with a status window that doesn't require user interaction

Version 1.16 - Build 0401 - 0405 (E360Crm.DLL updated)
BUG FIX: CRM - Update Customer - Search Notes - not filtering by customer id

Version 1.16 - Build 0401
Clarification
	* If you want access to the CRM functions - Your user account must have the "CRM User" flag checked in your user account
	** In order to see the CRM Admin menu and CRM Reports menu; the user must be both an administrator and have the CRM User flag or
		have the CRM Administrator flag in Group security and the CRM User flag in their user account
BUG FIX: Licensing not counting E360 users correctly
ENHANCEMENT: New security settings in User Groups
	CRM Administrator - This user has access to CRM Management Reports, the CRM Admin menu, and all notes
		CRM - User can see all notes - View notes for a customer regardless of who created them
			* if the "Edit All" is not also selected, the user can only "view" the note information, not make changes
		CRM - User can edit all notes - The user can edit notes created by anyone

Version 1.16 - Build 0330
BUG FIX: Advanced Inventory - Seasonal Ratio not calculating correctly on items with less than 12 months stocked
BUG FIX: CRM - Customer List not filtering properly if tags were left behind by a user
BUG FIX (Cosmetic): Analysis drill downs - Drill Up/Down buttons not resizing correctly
CHANGE: Custom Query - Export to Excel in the Custom Query tool now uses native Excel dates when exporting
CHANGE: Custom Query - Properly add names to columns with math functions
ENHANCEMENT: CRM Admin - Browse All Customer Notes - Added "Export" function
ENHANCEMENT: Purchase Analysis - Add % and total for % change
ENHANCEMENT: Browse Inventory Filters (Advanced Inventory) - Add automatic column resizing
ENHANCEMENT: Advanced Inventory - "Demand Instability" now calculated at the item level
- o Instability is determined by dividing the max qty sold on an invoice with the average qty sold per invoice (over the past year)
- o You can specify the % (threshold) when a part becomes "unstable"
- o You can now specify your "Instability Factor" as well - How much to adjust Min Qty on parts with unstable demand
- o Demand is now listed under the parts list for the past 2 years. Previously 3 "calendar" years were shown - now, there are the 24 past months
  - This effectively the same as before (unused demand was 'grayed' out); but tidiest up the display.
ENHANCEMENT: Advanced Inventory - Modified "Substitute Demand" button to only light up when there is appropriate demand to display

Custom Query - Table changes
view_purchasing - Added new columns
	- Added comparison_cost
	- Added normal_cost

Version 1.16 - Build 0316

BUG FIX: CRM - Customer list not auto-starting with the CRM Dashboard
BUG FIX: Dashboard - Sales by Salesperson - Drill down not respecting branch value
BUG FIX: Dashboard - Sales Product -> Customer - Drill down not respecting branch value
BUG FIX: Dashboard - Branch Analysis - Drill down not respecting branch value
BUG FIX: Dashboard - Sales by Customer Type - Drill down not respecting branch value
BUG FIX: Inventory - Inventory List - Drill down not respecting branch value
CHANGE: CRM - Query button not repositioning correctly
CHANGE: CRM - Update Customer - Cosmetic changes for spacing and alignment
CHANGE: CRM - Customer List - Show when a query is being applied to the list
ENAHANCEMENT: New check boxes in Administration, Admin Settings
      - Exclude sales for "Excluded" part by Product Line from Business Intelligence and Summary
      - Exclude sales for "Excluded" part by Product Group from Business Intelligence and Summary

Version 1.16 - Build 0310
BUG FIX: Trends - Sales Trend prompt is getting cut off
BUG FIX: Purchasing - Purchases by Product - Product Sub Line not displaying
BUG FIX: Searching Notes inside customer - Error message
BUG FIX: Query Scheduler mistakenly adding a '\' to the export location
BUG FIX: Item Transactions (demand tab) not using the correct information for the query
BUG FIX: CRM - Could link a customer to one not in the same company - should not be possible
CHANGE: Revamped the Update Customer layout - for suitability on smaller displays
CHANGE: Added Contact phone numbers back into the Customer list
CHANGE: CRM - Customer Notes are no longer removed when deleted; they are simply marked as deleted and no longer show up in the list.
ENHANCEMENT: CRM - Speed optimization when loading the customer for updating
ENHANCEMENT: CRM - Added sort header to notes inside customer update
ENHANCEMENT: CRM - Added a new CRM Report - Browse All Customer Notes - searchable and sortable
ENHANCEMENT: New mode for less details on the dashboard and CRM - This will be implemented in the future as an option
ENHANCEMENT: Advanced Inventory - Added an option to view demand generated by substitutes (does not modify the calculations)

Custom Query - Table changes
view_sales_with_inventory_info
      - Added "customer_po_number"
view_sales
      - Added "customer_po_number"
      - Added "bill_to_customer"
      - Added "tariff_code"
      - Added "country_of_origin"

Version 1.16 - Build 0301
BUG FIX: Searching when listing the custom queries was not working correctly (CTRL-F)
CHANGE: Basic email format checking in user update form
ENHANCEMENT: Dashboard - New graphs are now split onto a separate tab in the dashboard.
      - This improves speed and simplifies the main screen
ENHANCEMENT: CRM Dashboard - CRM now goes directly to the Customer List (as it used to).
      - Revamped the Customer List
      - Added two new tabs for the CRM Dashboard graphs
      - The graphs are only populated if you go to them
ENHANCEMENT: Custom Queries - Add the user's column name to the query - this provides a meaningful header for the results
ENHANCEMENT: Custom Query - Scheduling - Results are now export to XLSX format (not XML).
      - Please contact if you would like your scheduler enabled

Version 1.16 - Build 0218
COSMETIC: Font and layout issues on the Dashboard

COSMETIC: Font and layout issues on the CRM Dashboard
COSMETIC: Custom Queries - Window slightly too big at smallest font size
BUG FIX: GL Balance Sheet - Incorrect Balance as Of Date if Last Closed period was in the previous fiscal year and the number of periods was not set in the control record
BUG FIX: CRM Toolbar not resizing correctly
CHANGE: Customer Increase/Decrease on Dashboard will scale down to top 5 if the user's font size in E360 is 9 or less

Version 1.16 - Build 0217
BUG FIX: Custom Queries - Calculated Columns not working correctly
ENHANCEMENT: Schedule setup information - New settings in "Administration" menu, under "Admin Settings"
ENHANCEMENT: A/R Customer filtering - New settings in "Administration" menu, under "Admin Settings"
        - A/R can now be filtered by "Filter on Account Ranges", "Filter on Assigned Branch", or "Filter on Assigned Region", or any combination of the three

Version 1.16 - Build 0210
BUG FIX: BI Branch Sales - Dates not being set correctly during drill down
BUG FIX: Inventory Turn Drill downs - Duplicate Key error
CHANGE: CRM - When moving info to another customer - Filter out the FROM customer in the move TO customer selection
ENHANCEMENT: Dashboard - TOP 10 Customer Increases
ENHANCEMENT: Dashboard - TOP 10 Customer Decreases
ENHANCEMENT: Use the Period 1 and Period 2 dates in the column headers on Sales Analysis drill downs
ENHANCEMENT: Use the Period 1 and Period 2 dates in the column headers on Purchase Analysis drill down
ENHANCEMENT: Use the Period 1 and Period 2 dates in the column headers on CRM Sales Analysis drill down (by Customer)
ENHANCEMENT: CRM - Sales Analysis - Remove unused drill down level, add Product Line Descriptions to level 1
ENHANCEMENT: New flag for "Exclude XFER Sales" - On by default
        - Changed all appropriate drill downs to use the new flag
        - If the flag is on, all XFER types (including XFERA and XFERD) will be excluded
        - Setting is in "Administration", "Admin Settings"

Version 1.16 Build 0208
BUG FIX: BI Salesman Analysis - Drilling to level 2 if no salesman selected; listed re-lists all sales
BUG FIX: BI Salesman Analysis - Drilling down was not passing the branch correctly
BUG FIX: BI Counterman Analysis - Drilling down was not passing the branch correctly
BUG FIX: BI - Customer -> Product - Fall back to product line table for group if it does not exist in sadetail
BUG FIX: Advanced Inventory - Product Line filter intermittently not working correctly
CHANGE: Advanced Inventory - an item must have at least .25 calculated "Min Qty" before a max is calculated
CHANGE: Show negative demand and hits
CHANGE: Several maintenance routines enhanced for speed
CHANGE: CRM Dashboard - Removed extra graph reset
ENHANCEMENT: A/R - Drill to Customer Invoices - refactored for better speed
ENHANCEMENT: BI queries refactored for speed on larger data sets
ENHANCEMENT: Analysis Drill downs - refactored for speed on larger data sets
ENHANCEMENT: Analysis Drill downs - % Change added
ENHANCEMENT: Inventory List - Added "Last Kit Adjustment" column (date) when drilling into part numbers
ENHANCEMENT: Inventory List - refactored for increased speed
ENHANCEMENT: CRM - Customer List - Refactored for increased speed

Version 1.16 Build 0115

BUG FIX: 5 Year Sales graph - cosmetic - years not updating if the date range is changed after the graph is open

BUG FIX: A/R - Age from Previous not working correctly from Jan to Dec.

BUG FIX: CRM - Tag All / Clear All - not working correctly

BUG FIX: CRM Sales Reports - Customer -> Product - no results by salesman

BUG FIX: Cosmetic - CRM Dashboard - Background box alignment slips when the screen is maximized

CHANGE: CRM - Tag All / Clear All - improved performance on larger data sets

CHANGE: CRM - Customer List - Optimized speed of the customer list

CHANGE: CRM Management Report - Opportunities by Customer - Resize Columns when "Show Volume" is checked or unchecked

CHANGE: CRM Management Report - Opportunities by Product - Resize Columns when "Show Volume" is checked or unchecked

CHANGE: CRM Management Report - Opportunities by Salesman - Resize Columns when "Show Volume" is checked or unchecked

CHANGE: CRM Management Report - Opportunities by Phase - Resize Columns when "Show Volume" is checked or unchecked

ENHANCEMENT: Dashboard - Inventory Sales - Added "Hide Parts with No Sales" flag so unsold parts could be filtered out

ENHANCEMENT: Dashboard - Inventory Sales - Changed the default to show all selected parts regardless of sales

ENHANCEMENT: Added Calendar pop-ups to "Update Customer Note" form

ENHANCEMENT: CRM - Phase Log
     - Changes to opportunity phase are now logged so it is easy to see when and what changes occurred to opportunities
       - Added an Analysis screen - CRM Reports - Opportunity Phase Log
       - Added a Phase Log to the Opportunity portion of Customer "Opportunities" tab.
         * To view; right click on an opportunity and click "Phase Log" to view the changes that occurred to this opportunity.

ENHANCEMENT: Added "Autostart E360 Dashboard" check box to group security
     - Un-check it if you do not want the Dashboard to start automatically for a specific group

ENHANCEMENT: Inventory snap-shots - 1st of the month - all parts with qty <> 0 are recorded and stored in the database

ENHANCEMENT: Inventory snap-shots - Daily inventory summary by product line

Version 1.16 Build 0104

INTERNAL CHANGE: Advanced Inventory - Modified to use a more optimized query to calculate average daily sales

INTERNAL CHANGE: Changed all sales queries to use the sadetail table

INTERNAL CHANGE: Removed sales table and maintenance

INTERNAL CHANGE: Database index changes

BUG FIX: Advanced Purchasing - Filter not setting product line correctly

BUG FIX: Advanced Purchasing - Fields not always being cleared properly when loading a new filter set

BUG FIX: Better handling of special characters in user passwords

CHANGE: Changed the "Top 10 Salesperson" graph to use the salesperson summary table

CHANGE: Small changes to the "Top 10" graphs - back ground colours and query changes

CHANGE: Internal change to Item Min/Max maintenance

Version 1.15 Build 1208

BUG FIX: Custom Queries - Better memory handling on very large queries / export to Excel

BUG FIX: Advanced Inventory - Manually editing min/max did not update the total new cost / value change

CHANGE: Advanced Inventory - Small change to simplify the formula to calculate Min Qty
  - New Min Qty formula: (Purchase Cycle + Lead Time) * Daily Demand * Safety Factor * Instability Factor * Trend * Hits Weighting * Cost Weighting
  - If seasonal weighting is selected, then that also becomes a factor in the formula
  - Max Qty formula - New Min Qty * Desired Service Level ratio

ENHANCEMENT: Advanced Inventory - Changed the layout to more accurately identify which factors applied to each calculation

ENHANCEMENT: Advanced Inventory - Added "Safety Factor" to Advanced Inventory calculation

ENHANCEMENT: Advanced Inventory - Added "Demand Instability" - Adds additional safety margin for parts where demand varies greatly

ENHANCEMENT: Advanced Inventory - Added Default settings - Inventory Settings, Default Settings - settings added for:

        Default Lead Time (days)

        Default Purchase Cycle (days)

        Default Safety Factor

        Default Desired Service Level

        Default Seasonal Weighting

ENHANCEMENT: Lead Time defaults to the Supplier Branch Lead Time

Version 1.15 Build 1125

BUG FIX: Custom Queries - duplicate date phrase error

BUG FIX: Removed leading space from time in Min/Max export file name

BUG FIX: Branch Analysis not filtering by branch if the user is restricted to a single branch

Version 1.15 Build 1116

BUG FIX: Custom Queries - Asking the user for information could occasionally cause an error

BUG FIX: Custom Queries - Results - Dates not exporting to Excel correctly

BUG FIX: Dashboard - Blank export location caused Index Out of Range when exporting from the Dashboard

CHANGE: Custom Queries - Filter window cleaned up to hide un-usable options depending on data types

CHANGE: Custom Queries - Query generation changed to use date phrases within the actual SQL query (for scheduling)

CHANGE: Custom Queries - Optimization when asking for user information

CHANGE: A/R - Aging date changed to match new Evolution logic

ENHANCEMENT: Custom Queries - Added "Previous 7 days" as a date phrase

ENHANCEMENT: Custom Queries - Can now filter the results list with "CTRL-F"

ENHANCEMENT: CRM - Move Info - Now much easier to determine which customer to move the information to

   - New selection list with filtering

ENHANCEMENT: Custom Queries - New security settings in User Groups - Custom Queries tab - Schedule Administration, Schedule Queries

ENHANCEMENT: Custom Queries - Private queries can now be assigned to multiple user groups

ENHANCEMENT: Query Scheduling

   1. Scheduler for Custom Queries (run at a certain time)

      a. Queries can be scheduled as: Once, Weekly, or Monthly

         i. Queries run automatically and export to an XML file in a specified folder and then if desired, also to email

           - Email attachments are limited in max size to 5MB within the scheduler

           - If an attachment is too big to send; the user is still notified with the location of the exported file

     LIMITATIONS

         i. Calculated fields can not be included in the scheduled query results, as they are not part of the query

Version 1.15 Build 1021

BUG FIX: Parts inventory on summary - no branch selected - just showing one branch

CHANGE: Custom Queries - Queries are filtered out depending on security (currently they can't be run, but still show in the list)

CHANGE: Login Screen - Press F9 to reset the window position of E360 after login

   - A green check mark will appear if the window position is going to be reset.

ENHANCEMENT: Default export save locations

   - New tab in Administration Menu - Admin Settings, "Export Settings".

   - This allows the E360 administrator to set up a default save location for exports; as well as if the user can override the default path.

Version 1.15 Build 1006

BUG FIX: Advanced Inventory - Totals not resetting
CHANGE: Advanced Inventory - Grayed out months not yet reached in Demand / Hits display
CHANGE: Added Auto-Resizing to all columns in the Query Results
ENHANCEMENT: Custom Queries - Significant optimization to loading results into the results table
ENHANCEMENT: Advanced Inventory - Months stocked affects how much history is looked at
ENHANCEMENT: Advanced Inventory - Post to Evolution - Path is checked for incorrect '/' characters and automatically corrected
ENHANCEMENT: Advanced Inventory - Post to Evolution - Server is checked for in the Import path and added if missing

Version 1.15 Build 0914
CHANGE: Administration - Branch Settings - Add a check to make sure branches are current and active
ENHANCEMENT: New query table - view_crm_goals_and_sales
ENHANCEMENT: New query table - view_crm_opportunities
ENHANCEMENT: New sample query - Amador Sample - CRM Goals vs. Sales
ENHANCEMENT: New sample query - Amador Sample - CRM Sales Opportunities
ENHANCEMENT: New Flag in User Groups - CRM Security tab - CRM Management Reports
   - This allows a normal level user access to the CRM Management Reports (drill downs)
ENHANCEMENT: New Flag in User Groups - Custom Queries are Read Only
   - This user can access and run Custom Queries, but cannot create or modify them
ENHANCEMENT: Dashboard - Changed from Top 5 to Top 10 Customers Graph
ENHANCEMENT: Dashboard - Changed from Top 5 to Top 10 Product Lines Graph
ENHANCEMENT: Dashboard - Changed from Top 5 to Top 10 Branch Sales
ENHANCEMENT: Dashboard - Changed from Top 5 to Top 10 Salesman Sales

Version 1.15 Build 0908
CHANGE: Custom Queries - Better detect the need for quotes around non-numeric values in conditions
CHANGE: Custom Queries - Improved detection for numeric column types
CHANGE: Advanced Inventory - Changes to Calculating Min/Max - Significant enhancement on large numbers of items
ENHANCEMENT: Custom Queries - Now supports up to 255 columns for results
ENHANCEMENT: New export for "open items"
ENHANCEMENT: Open Order (Invoicing) added to Dashboard
   - Number of Open Orders
   - Open Order Sales
   - Open Order Gross Profit
   - Open Orders Margin

Version 1.15 - Build 0821
BUG FIX: Custom Queries - Asking for a numeric value could fail
BUG FIX: Custom Queries - Asking for a numeric value could add quote character
BUG FIX: Custom Queries - Canceling a query during the "Ask" portion would not properly close the status window
BUG FIX: Custom Queries - Canceling a query during the "Ask" portion would not properly reset the query buttons
BUG FIX: Custom Queries - A query with no results does not properly reset the query buttons
CHANGE: Custom Queries - Better column type detection when exporting (character vs. number) to Excel
CHANGE: Custom Queries - Further optimization of Custom Queries for speed
CHANGE: Custom Queries - Exporting query results to Excel forces an appropriate file extension (.xlsx)
ENHANCEMENT: Custom Queries - Progress bar added when clearing results table
ENHANCEMENT: Custom Queries - Exporting to Excel will automatically split rows past 1 million to a new sheet

Version 1.15 - Build 0819
BUG FIX: Hot Key search (CTRL-F) not always comparing values correctly
CHANGE: CRM Dashboard - Graphs appear to be slightly miss-aligned (Cosmetic)

ENHANCEMENT: Added the Status Window to Custom Queries
ENHANCEMENT: Significant changes to the Custom Queries to optimize speed when doing large queries and loading the results
ENHANCEMENT: New Export to Excel functionality in Custom Queries - no longer requires Excel on the workstation
  - Significant speed increase when exporting large query result sets
  - XLSX maximum worksheet size is 1,048,576 rows by 16,384 columns
ENHANCEMENT: XML Export split into two options - Standard XML and XML formatted for Excel
ENHANCEMENT: Status Window when exporting results from Custom Queries

Version 1.15 - Build 0813
BUG FIX: Custom Queries - TAB Export not properly exporting string fields
CHANGE: Optimized XML output in Custom Queries for Excel / Calc
CHANGE: Changed Cursor when exporting to TAB and XML
ENHANCEMENT: Custom Queries - Exports now remember previous setting of PATH and Preview

Version 1.15 - Build 0806
BUG FIX: Cancel not working in Advanced Inventory (Calc All)
BUG FIX: Custom Queries - Tab export not exporting last column if it was a number
BUG FIX: CRM Top 10 Customers / Products - Not handling kits correctly
BUG FIX: Custom Queries - Conditions not correctly quoting certain data types
BUG FIX: Custom Queries - Results not displaying correctly if a calculated column was the last column(s) in the report
CHANGE: CRM Call Analysis - Removed company filter from salesperson selection
CHANGE: Inventory drill downs - Force Part Number columns to text when exporting to Excel / CSV
CHANGE: BI drill downs - Force Part Number columns to text when exporting to Excel / CSV
CHANGE: Purchasing drill downs - Force Part Number columns to text when exporting to Excel / CSV
ENHANCEMENT: Add Search / Filter to Saved Queries
ENHANCEMENT: Exports in Custom Queries - Enhanced the export options with file dialog for excel and passing the file name to the dialog, as well as added a preview option

Version 1.15 - Build 0714
BUG FIX: Custom Queries - Moving Columns around after a calculated column had been created could result in an index out of range error
    *** NOTE: You still must re-do your calculated columns if you move your column order around, but you will be warned that your
          calculated column needs to be checked
BUG FIX: Custom Queries - Asking user for a value BETWEEN was sometimes adding a quote when it should not have
BUG FIX: 5 Year Summary Graph - Selecting to Graph by something other than company and coming back to company, left the selection field blank (no data)
BUG FIX: Advanced Inventory - Cosmetic - text for "At Avail Qty:" being cut off
CHANGE: Advanced Inventory - Added the Supplier Name to the Supplier drop list
CHANGE: Custom Queries - Moved Number format to the main filter page (off of the Advanced tab)
CHANGE: Moved "Begin Or" and "End Or" to the main filter page (off the Advanced tab)
CHANGE: Monthly Income Statement - Cosmetic change only - On initial load, columns start off as hidden
ENHANCEMENT: Custom Queries - Added the ability to use the DISTINCT keyword.
          This is useful when counting unique values; for example, invoice number from the view_sales table if you want to know how many invoices,
          rather than lines on each invoice.
ENHANCEMENT: Custom Queries
          - Revamped the Update column screen so the more common items are on the first tab

Version 1.15 - Build 0707
BUG FIX: 5 Year Summary - Choices from Customers, not always closing the StatusWindow
CHANGE: Disable Branch selection in the toolbar for accounting drill downs - not used in accounting drill

downs
CHANGE: Updated Icons for Accounting and Sales menu choices / windows
CHANGE: Branch list in Toolbar now excludes inactive branches
CHANGE: Inventory - Dead Stock - Exclude inactive branches
CHANGE: Inventory - List - Exclude inactive branches
CHANGE: Inventory - Turns - Exclude inactive branches
ENHANCEMENT: Optimized Exports in E360 to more readily use default program by file extension
ENHANCEMENT: Add Calendar Pop-up to Dead Stock date selections
ENHANCEMENT: Inventory - Dead Stock - Add Qty OH (On-hand) to "Current Activity" branch
ENHANCEMENT: Purchasing -> Purchasing by Product - add "Date Received" to final drill down level

Version 1.15 - Build 0624
BUG FIX: CRM License not be properly checked if Auto-Start CRM was enabled
BUG FIX: CRM Reports not showing up for Administrators
BUG FIX: BI Sales by Customer - Filter prompt not updating
BUG FIX: Accounting - G/L Account Balances - Date not always being set correctly
BUG FIX: Accounting - Yearly Income (Tree) - Date not always being set correctly
BUG FIX: Accounting - Monthly Income (Tree) - Date not always being set correctly
BUG FIX: Accounting - Year/Month Income (Tree) - Date not always being set correctly
BUG FIX: Accounting - Year/Month Income (Tree) - Columns being hidden unnecessarily
CHANGE: Dashboard Window can't be closed
CHANGE: CRM Dashboard can't be closed

Version 1.15 - Build 0622
BUG FIX: Sales by Counterman - Not refreshing properly from top toolbar change
BUG FIX: Accounts Payable - Not refreshing properly from top toolbar change
BUG FIX: Inventory Turns - Not respecting the branch selection in the toolbar
BUG FIX: Drilling into BI Product Sales - default to first line in the list
CHANGE: Branch Analysis - Show by Branch - If unchecked, now consolidates all branches (depending on the top toolbar Branch value)
CHANGE: 5 Year Summary - Replace month numbers on X axis with name (Jan, Feb, etc.)
CHANGE: Custom Queries - Optimized column sizing in Query Results
CHANGE: Status Window can now be open more than once if multiple processes are happening

Version 1.15 - Build 0611
BUG FIX: Custom Queries - BETWEEN when the field data type is a number adding extra quote characters

Version 1.15 - Build 0605
BUG FIX: Security on Balance Sheet - Not allowing users with security to open the balance sheet
CHANGE: Increased the size of the Query name from 30 to 255
CHANGE: Enable "CRM User" flag on user accounts
CHANGE: Button re-positioning correct on "Analysis" drill downs
CHANGE: CRM - Customer - Notes (inside update customer form) - optimized the column layout
CHANGE: Modified the sort order on the CRM Customer List slightly - now sorts "Customer Name, Customer Number" instead of just "Customer Name"
CHANGE: Added Start / End date to the "Previous 12 Months Sales" graph on the main dashboard (Summary)
CHANGE: CRM Dashboard - Added dates to the title of the Top 10 Customer and Product Line graphs
ENHANCEMENT: Custom Queries
  - Conditions - Add 'Text' to custom formatting
  - Conditions - Remove automatic "text" formatting for conditions
  - Filters - Be able to add a modifying factor: E.g. average_cost_after_receiving > average_cost_before_receiving * 1.1
  - Filter - Allow "TEXT" based "BETWEEN" filter
  - Special formatting applied to the query so export matches results shown
  - If PLUS math operator is used on a character based field; it joins the text together (concatenate)

- Show the "condition" in the Value Column in the "Columns on the Report" section
ENHANCEMENT: Add confirmation prompt when closing Custom Queries
ENHANCEMENT: BI - Product Sales - Added Sales Weighting
ENHANCEMENT: BI - Branch Sales - Added Sales Weighting

Version 1.15 - Build 0601
BUG FIX: Auto-Starting CRM could mis-draw the toolbar
BUG FIX: CRM - Customer List - Tagging records causes duplicates to be displayed

Version 1.15 - Build 0529
BUG FIX: Product Lines empty for some not-on-file parts
BUG FIX: Counterman Analysis - Ctrl-F search not working correctly
BUG FIX: Branch Analysis - Ctrl-F search not working correctly
BUG FIX: Salesman Analysis - Ctrl-F search not working correctly
BUG FIX: License checking was not checking the license cross-reference table (0527)

Version 1.15 - Build 0525
BUG FIX: Yearly Income (Tree) - 4th year repeating year 3 values
CHANGE: CRM Licensing - By User - Enforce User count - preparation for E360Mobile
ENHANCEMENT: CRM - Add flag for "main phone number" on contact - preparation for E360Mobile
ENHANCEMENT: Support SSL Encryption for database connections - preparation for E360Mobile

Version 1.15 - Build 0515
BUG FIX: Counterman Analysis - Drill backwards not working correctly
BUG FIX: Custom Queries - Calculated fields not being exported to Excel
BUG FIX: Balance Sheet - Future periods - use last closed period as "end date"
BUG FIX: Dashboard Summary - Previous 12 months sales graph – should now correctly show current month (based on end date from the toolbar) plus 12 months previous months
BUG FIX: Business Intelligence Security - Added new counterman, salesman, and customer type options to User Groups, double check all security settings and behaviour
BUG FIX: Accounting Security - Enabled security check for accounting settings in user groups
BUG FIX: Custom Queries - Export to Excel - not exporting string values correctly
ENHANCEMENT: Administration - User Groups - The list of security groups now shows the effective security
ENHANCEMENT: A/R - Track filter settings level 1 - level 2 - Should default to ALL at both levels then keep the settings based on the user's preference
ENHANCEMENT: New Export function - Export to Excel (XML) - Uses an XML file and opens Excel; does not require Excel libraries to create the export file
ENHANCEMENT: New Balance Sheet, one more level, plus totals, renamed titles, better sort order.

Version 1.15 - Build 0506
BUG FIX: Custom Queries - COALESCE not working properly on dates
BUG FIX: Sales by Counterman - Status window not always closing properly
BUG FIX: Inventory Transactions - Error when "Kit Item Sales" was check marked
BUG FIX: Custom Query - Ask for a value - Calendar button appearing when it should not
CHANGE: "Open" button selected when first opening "Custom Queries"
ENHANCEMENT: Inventory - Dead Stock - Improved query speed for partial selections
ENHANCEMENT: Advanced Inventory - Add totals for each year's demand/hits
ENHANCEMENT: Cross-over table for Customers (XFER) that will count as demand in specified branch
  - Demand table modified to check the cross-over table
ENHANCEMENT: Adjustment Type table to allow different adjustment types to be included as demand
ENHANCEMENT: Flag (system) to include negative adjustments as demand
ENHANCEMENT: Advanced Inventory - Use Status Window
ENHANCEMENT: Counterman Analysis - Add line count
ENHANCEMENT: Customer Analysis - Add currently assigned salesman

Version 1.15 - Build 0416
UPDATE: New Help Files
CHANGE: CRM Dashboard - TOP 20 to TOP 10
CHANGE: Cosmetic updates to new Analysis drill downs (adjust titles and drill level wording)
CHANGE: Enable/Disable branch selection in toolbar depending on the drill down currently with focus (if security allows branch selection)
CHANGE: Custom Queries - Added a check for NULL if a date or numeric field was being filtered on LESS THAN or LESS THAN OR EQUAL TO

Version 1.15 - Build 0410
BUG FIX: Purchases by Supplier - Portion (%) not calculating
BUG FIX: Summary not properly respecting the "Exclude HOUSE Sales from Business Intelligence and Summary" flag
BUG FIX: Inventory - Transactions - When calculating Demand, check for Invoice type
BUG FIX: Inventory - Dead Stock - When calculating last sale, check for item type and invoice type
CHANGE: CRM - Improved Filter options in Customer list
CHANGE : Inventory - Dead Stock - When calculating last sale, check for demand-override (in customer)
ENHANCEMENT: CRM Dashboard - Summary Page with Top 20 Customers, Top 20 Products, Alerts, To-Do, and Previous 12 months sales; all by salesperson.
ENHANCEMENT: Inventory List - Add item count
ENHANCEMENT: Inventory Dead Stock - Added Obsolete Branch and Selling Branch to the Filter Search
ENHANCEMENT: Salesman Analysis
ENHANCEMENT: Counterman Analysis
ENHANCEMENT: Branch Analysis
ENHANCEMENT: Demand calculations now respect the "Demand Override" flag from Customer Maintenance
ENHANCEMENT: New Setting (Administration, System Settings) - "Exclude XFER Sales from Demand"
  - Tells the system to exclude all XFER type sales from any demand calculations (does not affect "Sales" calculations)
ENHANCEMENT: CRM - Add Action Date and Time, added "Phase" and "Action Completed" to NOTES
ENHANCEMENT: CRM - Customer Analysis (Specific to Salesperson)
ENHANCEMENT: CRM - by Salesperson - Customer -> Product (Specific to Salesperson)
ENHANCEMENT: CRM - by Salesperson - Product -> Customer (Specific to Salesperson)
ENHANCEMENT: Purchases Analysis - Add totals

Version 1.15 - Build 0323
BUG FIX: G/L - Monthly Income - Error if double clicking on an invalid column (account number or name) to drill to account transactions
     - Added a message specifying to click on a valid (monthly) column
CHANGE: Phone numbers can now be pasted in using 555.555.1234 - invalid characters are now stripped and reformated

Version 1.15 - Build 0317
BUG FIX: Help -> About - File not closed error
BUG FIX: Login information with special characters (such as +) causing issues
BUG FIX: A/R Aging date not always being set correctly when using "Age From Previous"
BUG FIX: 5 Year Summary Graph - Graph by Customer / Product Line Error
BUG FIX: Opportunities by Phase - Add Export button
BUG FIX: Inventory Sales - Item Count not working
ENHANCEMENT: Add SLS% to Sales by Salesperson
ENHANCEMENT: Add SLS% to Sales by Counterman
ENHANCEMENT: Inventory - Last Sale / Last Received date now being looked up from sales; to account for kit adjustments and eliminate voided invoices.
ENHANCEMENT: Add SIC field to the CRM (update customer and Query screen)
ENHANCEMENT: Add Transaction Number column to A/P
ENHANCEMENT: G/L Account Balances (Tree-View)

- Show Account Balances for the last closed period
- Drop down to select previous periods
- Three levels – Account Type Balances -> Account Balances -> Transactions

ENHANCEMENT: Monthly Income Statement (Drill-Down)
- Start at Account Type (Revenue, Cost of Goods, etc.)
- Organized by monthly totals. Up to 96 months can be displayed at one time
- Drill from the Account Type -> Account Number details -> Transaction details

ENHANCEMENT: G/L
- Yearly (Tree-View)
- YTD with Projected current year, and 5 previous years

ENHANCEMENT: G/L
- Monthly Income (Tree-View)
- YTD plus 5 previous years
- All months shown horizontally

ENHANCEMENT: G/L
- Year / Month Income (Tree-View)
- Columns for Periods 1 through 12 (organized by fiscal year)
- a row for each year - current year and 5 previous years

ENHANCEMENT: Toolbar dates enable / disable depending on what screen has focus to make it clear if the dates apply or not

Version 1.15 - Build 0224
BUG FIX: CRM - Goal Setting - Sometimes locking up when displaying goals in the customer record
BUG FIX: Inventory Transactions - Not showing multiple records that occur on the same day with the same qty
CHANGE: Dead Stock - Last Date now calculated from sales
ENHANCEMENT: Dead Stock Analysis - Kit Adjustments now included as activity
ENHANCEMENT: Inventory Turns - Kit Adjustments now included
ENHANCEMENT: Inventory Transaction screen (demand tab) - Kit Adjustments now included
ENHANCEMENT: Inventory Sales - Now includes Kit Adjustments

Version 1.15 - Build 0204a
BUG FIX: A/P not properly processing 61 to 90 days

Version 1.15 - Build 0204
ENHANCEMENT: Add line count to Sales by Counterman

Version 1.15 - Build 0119
BUG FIX: Export SQL - Conditions not formatting between dates correctly
CHANGE: Enabled Ctrl-A in "Export Query" - Internal Change

Version 1.15 - Build 0119
BUG FIX: Dead Stock Report - Not resetting cleanly (cosmetic)
CHANGE: BI Sales by Product - Filter change to respect HOUSE setting
ENHANCEMENT: BI - Sales by countermen *** NEW ***
ENHANCEMENT: Totals now respect Filters (CTRL-F) and re-calculate
   BI - Sales by Branch
   BI - Sales by Customer
   BI - Sales by Product
   BI - Sales by Salesperson
   BI - Sales by Customer Type
   BI - Customer Analysis
   BI - Product Analysis
   BI - Customer -> Product
   BI - Product -> Customer

Accounting - Accounts Receivable
Accounting - Accounts Payable
Inventory - List
Inventory - Turns
Inventory - Sales
Purchasing - by Supplier
Purchasing - by Product

Version 1.15 - Build 0112
BUG FIX: Totals in A/R showing under the wrong columns
CHANGE: Make the Group selection in "Inventory List" case sensitive

Version 1.14 - Build 1216
BUG FIX: Custom Queries - Sort Order not working properly with more than 65 columns
BUG FIX: Dashboard - Inventory List - Incorrect columns being displayed
ENHANCEMENT: CTRL-F - Added a Search Filter/Find on the following lists
  Business Intelligence
    Sales by Branch
    Sales by Customer
    Sales by Product
    Top Sellers
    Sales by Salesperson
    Sales by Customer Type
    Customer Analysis
    Product Analysis
    Customer -> Product
    Product -> Customer
  Accounting
    Accounts Receivable
    Accounts Payable
  Inventory
    Inventory List
    Inventory Turns
    Inventory Sales
    Dead Stock Analysis
  Purchasing
    Purchasing by Supplier
    Purchasing by Product
    Purchasing Analysis
  CRM
    Customer Notes
    Customer Contacts
  Custom Queries - Results

Version 1.14 - Build 1205
BUG FIX: BI Branch Sales - Inadvertently including XFER sales
CHANGE: Dashboard Buttons not available because of security settings are disabled now rather than hidden
CHANGE: Consolidated A/R and A/P into an Accounting button on the dashboard to allow for upcoming options
ENHANCEMENT: Manually picking dates in toolbar will now change the "Date Range" to '- CUSTOM -' so you can see custom dates are being used
ENHANCEMENT: Inventory List -> Into Line for parts - Show Backorder QTY
ENHANCEMENT: Inventory List - Search by part number (CTRL-F)
ENHANCEMENT: Accounts Payable - Totals and Vendor search (CTRL-F)

Version 1.14 - Build 1201

BUG FIX: Custom Queries - Conditional reporting not checking for valid values properly
BUG FIX: Security - Sales Summary screen showing even when security has been set to prevent it
CHANGE : Clarified the Inventory Value message on the summary screen
CHANGE: Security - User Groups – Modified the screen layout to make the options more clearly defined
NEW FEATURE: Accounts Payable drill down by Vendor
ENHANCEMENT: New setting to allow "HOUSE" sales to be filtered out of the dashboard
   - Administration - Admin Settings - "Exclude House Sales from B.I."

Version 1.14 - Build 1121
BUG FIX: CRM - Auto-Start ignoring invalid license
BUG FIX: CRM - Opening a customer to edit - notes very slow to populate
BUG FIX: CRM - Notes Tab not showing for CRM only users inside the customer update form
BUG FIX: Custom Queries - Condition not allowing edit of non-dates with a "BETWEEN" condition
BUG FIX: Custom Queries - Phrases not working correctly
CHANGE: License check within CRM disabled - only occurs on log in
CHANGE: CRM - Display Email / Contact field from Evolution
ENHANCEMENT: CRM - Note Security enforced if the person logged in is not an administrator and the note is not theirs (EDIT / DELETE disabled)
ENHANCEMENT: Custom Queries - Add "Previous 3 Months" as a date phrase (Filter and Condition)
ENHANCEMENT: CRM - New Button - "My Notes" allows Sales people to pull up their notes for a date range (defaults to the previous 7 days).
   The list can be exported or printed
ENHANCEMENT: Custom Queries - Calculate Field (so you can do calculations on the results you obtain (like Margin, also useful for things like rebates and commissions)
ENHANCEMENT: System - Add a setting to allow users to use the "Preview SQL" button in the Custom Queries

Version 1.14 - Build 1105
BUG FIX: Custom Queries - Less than and Greater Than date fields not working correctly
BUG FIX: BI - Sales by Product - Not properly reading the branch selection from the toolbar
CHANGE: Removed date restriction from item history when drill from Customer and Product Analysis as the dates used there are not the same as the toolbar
ENHANCEMENT: BI - Customer Analysis - Added drill to item history
ENHANCEMENT: BI - Customer Analysis - Updated titles as you drill down / up through the analysis
ENHANCEMENT: Customer Analysis - Add Margin Analysis
ENHANCEMENT: Product Analysis - Add Totals for Margin and total variance
ENHANCEMENT: New status window operation when calling part history

Version 1.14 - Build 1024
BUG FIX: A/R - Search not handling special characters
BUG FIX: A/R - Totals not displaying properly (too close together)
BUG FIX: BI - Sales by Customer - Invalid Characters in customer name not being handled correctly on drill down
BUG FIX: BI - Sales by Customer - Search not handling special characters
BUG FIX: BI - Sales by Product - Not refreshing properly when toolbar dates are changed
BUG FIX: BI - Sales by Product - Totals not aligning properly
BUG FIX: BI - Product Analysis - Totals to 4 decimals for accuracy in calculating
BUG FIX: BI - Customer Analysis - Totals to 4 decimals for accuracy in calculating
BUG FIX: Customer Analysis - Up/Down flag not be set correctly for Profit Analysis
CHANGE: BI - Sales by Customer - Totals not formatting correctly with numbers over 9,999,999.99 - now displays to 999,999,999.99
CHANGE: BI - Product -> Customer - Totals not formatting correctly with numbers over 9,999,999.99 - now displays to 999,999,999.99
CHANGE: Inventory Sales - Now respects branch selection in the top toolbar
CHANGE: Inventory - Add and clarify quantities filter
   CHANGE: Understock = On Hand + On Order < Min Qty
   CHANGE: Overstock = On Hand + On Order > Max Qty

ENHANCEMENT: On Hand Qty < Min Qty *NEW*
ENHANCEMENT: On Hand Qty > Max Qty *NEW*
CHANGE: Advanced Inventory - Added "Purchase Ratio" to the list as well as to the calculations for Max Qty
   NOTE: If either Standard Purchase Package or Purchase Ratio are set to 0 then they are set to 1
ENHANCEMENT: Status Window Changes
   - Can now cancel a query for most BI elements (summary can not be canceled)
   - Title of drill down now added to the status window
   - Stage of activity added to the status window (title changes)
   - Added an activity indicator
   - Closing the Status Window by clicking on the 'X' at the top right corner cancels the query
ENHANCEMENT: Inventory Sales - Add "Show Transfers" option
ENHANCEMENT: BI - Product Line Analysis *NEW*
ENHANCEMENT: BI - Sales by Customer Types *NEW*
ENHANCEMENT: BI - Sales by Product - Add drill level from Part Number to Customer *CHANGE*
ENHANCEMENT: Custom Queries - Results expanded to 80 Columns
   - Updated Export functions to handle the additional columns

Version 1.14 - Build 1007
BUG FIX: BI - Products -> Customer - Duplicate product lines due to data differences (sub-line column)
BUG FIX: CRM - Could add a "Prospect" without a customer name
CHANGE: Inventory Sales - Removed an extra sort to help with speed on larger data sets
ENHANCEMENT: New Flag in User Groups - Hide Costs
  - Setting this flag in a user group will hide cost, profit, and margin in the Dashboard
EXTERNAL: View for Inventory with Volume (shows in Custom Reports)

Version 1.14 - Build 0930
BUG FIX: Purchases by Supplier - Not refreshing from toolbar
BUG FIX: Purchases by Product - Not refreshing from toolbar
BUG FIX: Purchasing Analysis - Not refreshing from toolbar
BUG FIX: Purchasing by Product / Supplier - File issue when both were open at once
CHANGE: Dead Stock Analysis - now uses Status Screen
ENHANCEMENT: Add Portion (% of) to Purchases by Supplier
ENHANCEMENT: Add Portion (% of) to Purchases by Product
ENHANCEMENT: Custom Reports - Add support for phrases in condition processing
ENHANCEMENT: Custom Reports - Option to override the filter for a conditional statement
ENHANCEMENT: Customer Sales Analysis - Added "Show by Branch" option if no specific branch is selected in the toolbar
ENHANCEMENT: Revamped the column resizing to more evenly resize the columns
ENHANCEMENT: CRM Reports - Opportunities by Salesman
ENHANCEMENT: CRM Reports - Opportunities by Customer
ENHANCEMENT: CRM Reports - Opportunities by Product Line
ENHANCEMENT: Advanced Inventory - Added "Demand Trend" by item to the Advanced inventory calculations
ENHANCEMENT: Advanced Inventory - Added the ability to weight how much seasonality affects calculations (Seasonality Index Weighting)

Version 1.14 - Build 0915
CHANGE: Added "show transfer" check box to summary screen
CHANGE: Went over all B.I. drill downs to remove transfers from sales figures

Version 1.14 - Build 0912
ENHANCEMENT: Removed drop box for "Linked to Customer" to improve edit speed
  - Replaced with Customer Lookup for linking
ENHANCEMENT: New option in "User Groups" - "Autostart CRM"
  - When this flag is set, users in the security group will automatically start with the CRM open

ENHANCEMENT: Custom Reports (Query Tool)
  - Add condition separate from filter
  - Add optional "ELSE" to the conditional processing
  - Math can now apply to columns
  - Math can apply to conditional processing (within the condition field)

Version 1.14 - Build 0908
BUG FIX: Advanced Inventory - Cost Factors - Not saving to 4 decimal places
BUG FIX: Advanced Inventory - Hits Factors - Not saving to 4 decimal places
BUG FIX: Advanced Inventory - Totals not calculating properly if the "Hide Unchanged" flag is set
BUG FIX: Advanced Inventory - Seasonality Ratio not calculating properly past month 12
CHANGE: Inventory List - Right Click menu option for transactions when list is at the part number level
CHANGE: Inventory List - name value columns based on inventory costing flag (Average or Replacement)
CHANGE: Advanced Inventory - Manually editing a part now warns when the max qty does not respect the package quantity
CHANGE: Advanced Inventory - Combined Product/Sub Line into a single drop box. Sub Line must match (Including blank)
CHANGE: Advanced Inventory - Formulas adjusted so Cost / Hits weighting affects minimum quantities
CHANGE: Advanced Inventory - Formulas adjusted so Service Level weighting affects minimum quantities
ENHANCEMENT: CRM - Move function now also moves Goals and Opportunities
ENHANCEMENT: Inventory Turns
  - Add "Description" to level 1 (branch name)
  - Add "Description" to level 2 (group)
ENHANCEMENT: Dead Stock Analysis
  - Add a flag to show all obsolete items even if they have no sales in other locations
NOTICE: Advanced Inventory
  - Min Qty Formula: ((DailyDemand * LeadTime) + (DailyDemand * PurchaseCycleDays)) * SafetyWeight * TrendFactor * SQRT(ServiceWeightFactor) * HitsFactor * CostFactor

Version 1.14 - Build 0827
BUG FIX: CRM Reports - Misreporting Goals
CHANGE: CRM Reports - Rebuild all queries to only report sales with goals attached to them
MAINTENANCE: Clean up
  - Make sure focus is checked before resizing list columns
  - Make sure templates are used everywhere (replace manual calls to jrtResize class
  - Frame Resizing - Use a single resize event for refreshing graphs (speed up)

Version 1.14 - Build 0825
BUG FIX: CRM - Sales Analysis - Calculating totals not occurring properly when product sub-line field was mismatched (NULL)
BUG FIX: Business Intelligence - Sales by Product Line - Drill Up button not disabling when using the back button
CHANGE: Custom Reports - Hot Keys for Save (Alt-S) and Save-As (Alt-Shift-S)
ENHANCEMENT: *NEW* Inventory Drill down
  - Dead Stock Analysis
  - Allows you to see in-active stock in a branch and what branch or branches have active sales for the items
ENHANCEMENT: Custom Reports - New date filter phrase - "PREVIOUS MONTH LAST YEAR"
ENHANCEMENT: Custom Reports - Be able to clear the results separately from the query
ENHANCEMENT: Custom Reports - Add more format options
  - Changed the format options to a drop box (removed the check boxes for "Format as Invoice" and "Format as Number"
  - Now you can select from multiple format types:
    - 'Invoice Number' (format: ###-######)
    - 'Number with 2 Decimals' (format: ###,###,###.##)
    - 'Number with no Decimals' (format: ###,###,###)
    - 'Phone Number' (format: ###-###-####)

- 'Unformatted Number' (format: #########)
ENHANCEMENT: CRM - Sales Analysis - Add totals to the bottom
ENHANCEMENT: BI - Sales Analysis - Add totals to the bottom

Version 1.14 - Build 0819
BUG FIX: CRM / Query Filter not working correctly with company name and tagged/untagged records
CHANGE: CRM Call Analysis - Modified the Customer Drop box to build from the results list instead of the customer table
   - only customer's in the list are in the drop box for filtering
CHANGE: CRM - Standard Search - now searches for customer number
CHANGE: CRM - Modified the filter on the customer list to initialize quicker
CHANGE: CRM - Added descriptions to Group and Line when updating Opportunities
CHANGE: CRM - Added "Calculate Margin/GP" button to Update Opportunities
ENHANCEMENT: *NEW* Purchasing Drill Downs
   - Purchases by Supplier - Starts at "Supplier" and then drills to Product Line, then Part Number, then PO info.
   - Purchases by Product - Starts at "Product Line" and then drills to Part Number, then Supplier, then PO info.
   - Purchasing Analysis   - Starts at "Supplier" and then drills to product line, and then part number

Version 1.14 - Build 0812
BUG FIX: CRM - Update Customer - User Defined Fields - the field name is getting cut off when a long name is used
BUG FIX: Custom Reports - Custom Sort Order not working correctly if "Filter Only" fields were listed before the custom sort fields
CHANGE: Hide the "Credit Admin" tab when the customer is a "Prospect"
CHANGE: Hide "Pipeline Phase" when the customer is an existing customer from AutoPoint Evolution
CHANGE: Cosmetic changes for resizing lists
CHANGE: Move "User Defined Fields" to CRM Admin
CHANGE: Move "Notes Reasons" to CRM Admin
CHANGE: Move "Salesperson Reference" to CRM Admin
ENHANCEMENT: CRM - Add "Opportunities" tab for tracking opportunities and the phase of each opportunity (by product line)
ENHANCEMENT: CRM - Add "Pipeline Phases" to CRM Admin menu for defining the different phases
ENHANCEMENT: CRM - Added "Product Line Description" in the Update Customer Screen
ENHANCEMENT: CRM - "All Customer Goals" - Added Product Line Description
ENHANCEMENT: CRM - "All Customer Goals" - Added "Export" button so the list can be exported or printed
ENHANCEMENT: Revamped "All Customer Goals" for increased speed
ENHANCEMENT: Added "Description" to the "All Customer Goals" screen (product line description)

Version 1.14 - Build 0716
BUG FIX: Issue with CRM customer's and displaying multiple notes
CHANGE: CRM Reports - New Account Goals vs. Sales
 - Simplified the report to show sales person and their goals vs. sales by product group / line
 - Will add to drill down once we know what to drill to
ENHANCEMENT: BI Inventory Sales - Add Item Count

Version 1.14 - Build 0714
BUG FIX: New Account Goals - New Account Goals vs. Sales - not filtering properly on new accounts
CHANGE: Hide Columns and replace with title info - Products -> Customer
CHANGE: Modify the CRM Drill downs to use the product group vs. sales instead of just product line
CHANGE: Rename "CRM" menu item to "CRM Admin" to make it distinct from the CRM button on the top toolbar
CHANGE: Add sortable headers to "Goals" under CRM Admin menu
ENHANCEMENT: New Account Goals - 3rd Level to Part Number

Version 1.14 - Build 0710
BUG FIX: CRM Goal Setting - Sales Query - Not getting goals correctly if just a product group is selected
BUG FIX: CRM Menu not showing
CHANGE: Resizing changed on lists in all procedures

Version 1.14 - Build 0709
BUG FIX: CRM - Customer Goals - Sub-Line not being checked properly for sales query
BUG FIX: CRM - Sales Report - Sub-line not being checked properly for sales query

Version 1.14 - Build 0708
BUG FIX: Owner string wasn't set correctly on sys_dbaccess file

Version 1.14 - Build 0707
BUG FIX: CRM - Sales Analysis - Not opening in its own thread
BUG FIX: CRM - Sales - Not displaying description properly on first level
BUG FIX: CRM - Contact - Phone Number Extension - Corrected field size
BUG FIX: A/R - Filter not working correctly
CHANGE: Improved Column Resizing on several drill down lists.
CHANGE: Improved Field Type detection in Custom Reports for better sorting with conditional filters
CHANGE: A/R Drill down more reliably return to the originating row
CHANGE: Improved off-screen detection and repositioning
ENHANCEMENT: * NEW * Inventory - Inventory Sales (new drill down)
  - Displays inventory and sales by Part Number - Uses Dashboard date range (all parts regardless of sales)
  - Part numbers - BI - drill down by part number
  - Activity Qty Sold, Total Sales, Total Gross Profit, Total Margin
  - Drill down to Part Transactions
ENHANCEMENT: Inventory Transactions - Filter for Sales, Adjustments, Receiving
ENHANCEMENT: Inventory Transactions - Flag to separate kit items from header
ENHANCEMENT: Inventory Turns - Flag to separate kit items from kit header

Version 1.14 - Build 0624
CHANGE: Login and User names are always forced to lowercase
ENHANCEMENT: Custom Reports - New column for "Sort Order". This allows you to put the fields in whatever order you want and sort the results based on any column

Version 1.14 - Build 0623
BUG FIX: CRM - Clicking on Link button does not bring up linked customers
CHANGE: CRM - Goals - Check for values for Product Group / Line before trying to set the local variable value
ENHANCEMENT: CRM - Flag in Customer for "New Account" to make reporting for new account sales easier

Version 1.14 - Build 0620
BUG FIX: Inventory Transactions - Sub Line / Category causing issues
CHANGE: e360_sysinfo.txt updated with CRM license count
ENHANCEMENT: Custom Reports - Aggregate functions are now wrapped with COALESE to prevent sorting issues when a NULL value is the result
ENHANCEMENT: Custom Reports - Look up Field Name for "Conditional" statements (button)
ENHANCEMENT: Custom Reports - Save As button - Saves current query with a new name
ENHANCEMENT: Advanced Inventory
  - CTRL-F - Find Part Number or Description (sets a filter)
  - CTRL-SHIFT-F - Clears part find / filter

CHANGE: Advanced Inventory - "Branch" changed to "Purchasing Branch" for clarity
ENHANCEMENT: Advanced Inventory - Demand can now be calculated for all branches if "Demand for all Branches" is checked
ENHANCEMENT: Inventory List
  - CTRL-F - Find Part Number or Description (sets a filter)
  - CTRL-SHIFT-F - Clears part find / filter
ENHANCEMENT: Inventory Turns
  - CTRL-F - Find Part Number
  - CTRL-SHIFT-F - Clears part find / filter
ENHANCEMENT: CRM - New Accounts Goal setting by Sales Person

Version 1.14 - Build 0609
BUG FIX: CRM Goal Reports - Error processing months greater than 4 (April)
BUG FIX: Process window when loading Customer Sales Analysis information
BUG FIX: Inconsistent totals on Inventory Turns
CHANGE: Advanced Inventory - Flag if a part was edited manually
ENHANCEMENT: Business Intelligence - Product Sales will now drill to part transactions
ENHANCEMENT: Inventory List - Drilling to item history now shows "Transfer" transactions
ENHANCEMENT: Business Intelligence - Change to Customer Sales Analysis filter for better performance
ENHANCEMENT: Custom Reports - Modified the "numeric" formatting to show more numbers
INTERNAL CHANGE: Added logging for processes being called

Version 1.14 - Build 0530
BUG FIX: Custom Reports (Query Tool) - Start and End values for "BETWEEN" filters not loaded when the field type is not a date
BUG FIX: Advanced Inventory - Kit item sales not included in demand
CHANGE: Accounts Receivable - returning to level 1 from level 2 places the cursor on the customer last shown
CHANGE: Advanced Inventory - Returns are counted as "negative" hits
CHANGE: Custom Reports (Query Tool) - Better cancelling when asking for user values
CHANGE: - Administration (User Groups) - Products -> Customers - check box - flag for security
CHANGE: - Administration (User Groups) - Advanced Inventory - check box - flag for security
ENHANCEMENT: Advanced Inventory - Save / Load options
ENHANCEMENT: Advanced Inventory - New Filter to hide items without a value change
ENHANCEMENT: New inventory working table - makes load times for inventory much faster

Version 1.14 - Build 0515
BUG FIX: Query Tool - Intermittent issue with auto-numbering query fields
BUG FIX: BI - Sales by Product - Could not sort by Product Line - show both fields so either is now sortable
ENHANCEMENT - Query Tool - Expanded to 40 columns (from 20)
ENHANCEMENT - Advanced Inventory - A new Min/Max analysis system; with forecasting, cost and hits weighting, seasonality indexing

Version 1.14 - Build 0425
BUG FIX: Customer Sales Analysis - Product lines not comparing correctly
BUG FIX: Custom Reports - CASE statements missing a space before "GROUP BY" statement

Version 1.14 - Build 0411
BUG FIX: Product -> Customer - Drill down via arrow buttons not working
BUG FIX: Customer -> Product - Not refreshing correctly if Product -> Customer open
BUG FIX: Totals not calculating to enough decimal places for consistency (rounding errors depending on the number of rows returned)
BUG FIX: Sales at Cost on Inventory Turns using Sales instead of Costs
BUG FIX: Inventory Turns - Totals at the bottom not lining up correctly
ENHANCEMENT: Summary - Sales Information - re-tuned with sales table for speed / accuracy

ENHANCEMENT: Graph - Top 5 Branches - re-tuned with sales table for speed / accuracy
ENHANCEMENT: Graph - Top 5 Customers - re-tuned with sales table for speed / accuracy
ENHANCEMENT: Graph - Top 5 Product Lines - re-tuned with sales table for speed / accuracy
ENHANCEMENT: Graph - Top 5 Sales People - re-tuned with sales table for speed / accuracy
ENHANCEMENT: BI - Branch Sales - re-tuned with sales table for speed / accuracy
ENHANCEMENT: BI - Customer Sales - re-tuned with sales table for speed / accuracy
ENHANCEMENT: BI - Product Sales - re-tuned with sales table for speed / accuracy
ENHANCEMENT: BI - Salespeople Sales - re-tuned with sales table for speed / accuracy
ENHANCEMENT: BI - Customer -> Product - re-tuned with sales table for speed / accuracy
ENHANCEMENT: BI - Product -> Customer - re-tuned with sales table for speed / accuracy
ENHANCEMENT: Inventory - Drill to part number transaction - Demand query re-tuned with sales table for speed / accuracy
ENHANCEMENT: Inventory Turns - Sales at Cost query re-tuned with sales table for speed / accuracy

Version 1.14 - Build 0331
BUG FIX: Totals on Summary - margin not calculating correctly
CHANGE: CRM - Notes only show for Admin level users or the user that wrote the note
CHANGE: Add Goals YTD Column to CRM Drill downs
CHANGE: Modify the "Profit Goal" to be Profit YTD Goal
ENHANCEMENT: Summary Table for sales by Products
ENHANCEMENT: CRM - Added "Volume" calculations to the Goal setting
ENHANCEMENT: CRM Reports - Add a "Volume" checkbox to
   - CRM Customer Sales vs. Goals
   - CRM Product Sales vs. Goals
   - CRM Salesmen Sales vs. Goals

Version 1.14 - Build 0326
 E360 Changes
  ENHANCEMENT: Increase performance of aging list export
  ENHANCEMENT: Custom Reports - Can now be saved and made private for a user "Group"
  ENHANCEMENT: Sales by Product - Filters recalulate the totals displayed
  ENHANCEMENT: Customer -> Product - Filters recalulate the totals displayed
  ENHANCEMENT: New Drill down - Products -> Customers
  ENHANCEMENT: Products -> Customers - Filters recalculate the totals displayed

 CRM Changes
  ENHANCEMENT: CRM Goal vs. Performance - Sales drill Down by Customer
  ENHANCEMENT: CRM Goal vs. Performance - Sales drill down by Product Line
  ENHANCEMENT: CRM Goal vs. Performance - Sales drill down by Salesman

Version 1.14 - Build 0311
BUG FIX: Logging into an account without security was still openning a toolbar
BUG FIX: CRM only users were not seeing the top toolbar (sets company, branch, and date ranges for reports)
CHANGE: View Inventory - Overstock Filter now only shows items with Qty On Hand > 0
CHANGE: View Inventory - Totals change based on filters applied
CHANGE: Sales by Product Line - Totals change based on filters applied
CHANGE: Custom Reports - When fields are picked for a report, the report table drop box is disabled so that the user can not add fields from more than one table
CHANGE: When "Restrict CRM by Salesperson" is checked, the sales people can see all customers; but only the basic customer information is displayed (no notes, custom fields, etc.)
ENHANCEMENT: Custom Reports - Added "Format as Number" on advanced tab of field options
ENHANCEMENT: 5 Year Summary Graph - Company summary changed to use salesum table for improved performance
ENHANCEMENT: 5 Year Summary Graph - Branch summary changed to use salesum table for improved performance
ENHANCEMENT: CRM - Goal setting by customer for product groups, lines, salesperson (including

calculations for goals with increase to sales and profit margin)
ENHANCEMENT: Custom Reports - Added a flag for "Group All" for queries where there is no column to SUM (or aggregate) but you want the results grouped
ENHANCEMENT: Added "Edit CRM / Sales Goals" to Group security
ENHANCEMENT: Added "Allow Salesperson Change in Goal Setting"

Version 1.14 - Build 0219
ENHANCEMENT: CRM - Link one company to another (Branch locations)
  - Icon to show direction of link
  - Double click icon to open the list of linked companies.
    - Double click a company to edit from the linked company list

Version 1.14 - Build 0210
BUG FIX: CRM Licensing not calculating correctly
CHANGE: Resize clean up

Version 1.14 - Build 0207
BUG FIX: Demand Header names not showing correctly (inventory transactions)
BUG FIX: Summary Page Inventory values not refreshing on branch change
CHANGE: Inventory transactions now use subline and category

Version 1.14 - Build 0206
BUG FIX: Inventory on Summary page was always for all branches – now respects the branch in the toolbar
BUG FIX: Inventory List - Inventory totals flipped between avg and repl cost
BUG FIX: When prompting for a customer name on a "Custom Report"; filter "Operator" LIKE isn't adding % symbols like it should
BUG FIX: Inventory - Filter on group not always seeing the group information correctly
CHANGE: When pasting or entering a phone number with non-numeric characters, a warning is displayed so the user knows what's wrong
ENHANCEMENT: Summary Table for Sales Summary by branch (main summary page).
  Created during first login of the day, used throughout the day
ENHANCEMENT: Custom Reports - Can flag a column for "Invoice Number" formatting - on "Advanced tab" (###-######)

Version 1.14 - Build 0124
BUG FIX: Graph - 5 year sales - buttons for sales/profits/costs not being moved properly on resize
CHANGE: Modified inventory queries to add product_sub_line and product_category to the join statements
ENHANCEMENT: Added Product Sub-Line to inventory drill downs
ENHANCEMENT: Added Product Category to inventory drill downs - set flag in Amador menu, System Settings - "Tag System - Show Inventory Category Column"
ENHANCEMENT: CRM - Add the ability to Tag Customers
  Can filter by tagged customers
ENHANCEMENT: CRM - Mass email from within E360 to selected customers
ENHANCEMENT: CRM - Add new option on Right Click Menu
    Email customer
    Email tagged customers - key contacts
        Email tagged customers - all contacts
ENHANCEMENT: CRM - Add "Email Contact" to right click menu on contact list
ENHANCEMENT: CRM - Email signature - HTML format
  Tools - My Email Settings
ENHANCEMENT: CRM - Email send from within E360 - Need to define SMPT server information
ENHANCEMENT: CRM - Contact: Physical address
ENHANCEMENT: CRM - Contact: 2nd name field (branch info?)
ENHANCEMENT: CRM - QBE for customer - drop box for fields
ENHANCEMENT: CRM - Split resizing between the bottom and top sections of the main CRM customer

list.
ENHANCEMENT: Flag in contact for "key contact"

Version 1.13 - Build 1219
BUG FIX: Update User not filtering branch by company
BUG FIX: A/R Aging list not being created for all companies
BUG FIX: Password
CHANGE: Drilling to Inventory transactions from Inventory list - Set a default date range of 3 years from end date to end date
CHANGE: F8 to close Inventory
CHANGE: F8 to close A/R

Version 1.13 - Build 1218
BUG FIX: Custom Reports - Export Query - Error message
BUG FIX: Custom Reports - "OR" statement error when it is the only filter on the report
BUG FIX: Top Sales - Drill to inventory not working
CHANGE: Hide Group Drop down on "Inventory" list when "All parts" are selected
ENHANCEMENT: Drilling to Inventory transaction history - show dates on item demand

Version 1.13 - Build 1217
CHANGE: Expand User Name to 32 characters
ENHANCEMENT: Modify Inventory list to start with all product lines; and have a drop box to filter the list by product group
ENHANCEMENT: Modify Sales by Product list to start with all product lines; and have a drop box to filter the list by product group
ENHANCEMENT: Modify Customer -> Product list to start with all product lines; and have a drop box to filter the list by product group

Version 1.13 - Build 1213
BUG FIX: CRM Sales Analysis Period 1 vs. Period 2 figures not calculating properly
BUG FIX: If no dashboard window is active; there was no way to show the toolbars to open something
BUG FIX: Limit Branch selection by company on Dashboard toolbar
BUG FIX: CRM - Disable Sales / Analysis button on Prospects
BUG FIX: Customer -> Product - Need a CRM specific table
CHANGE: F8 to close window - A/R, Inventory, Inventory Turns, Graphs

Version 1.13 - Build 1211
BUG FIX: A/R calculations on companies without any A/R periods was generating an error - now A/R is blank if the company record does not have valid periods defined
BUG FIX: Sorting in Custom Reports not working correctly when CASE statement used - field types not always matching
BUG FIX: Typing in an incorrect password for a valid login responded with an incorrect error message
BUG FIX: Sales Intelligence - Branch Sales - Resize Columns not working correctly
CHANGE: Accounts Receivable - Search for a numeric value now does a partial search by customer number instead of requiring an exact match
CHANGE: Tidy up layout of User Group update form
CHANGE: Modified the sort order of the summary sales information (Parts, Labour, Cores, Special)
ENHANCEMENT: Add Drill Downs to "Customer Analysis" - 2 drill down levels added - Customer -> Product Line, Product Line -> Part Number
ENHANCEMENT: Added CRM license tracking
ENHANCEMENT: Exports to CSV from any of the Dashboard Exports
ENHANCEMENT: Exports to PDF from any of the Dashboard Exports
ENHANCEMENT: Exports to XML from any of the Dashboard Exports
ENHANCEMENT: CRM functions
ENHANCEMENT: CRM - 20 user definable fields for each customer

CRM - Child table for contacts - unlimited contacts per customer

CRM - Child table for contact phone numbers - unlimited phone numbers per contact

CRM - Child table for notes (Date, Time, Created by, Note)

ENHANCEMENT: CRM - Search on customer number, address1, address2, phone number, contact phone number, province

ENHANCEMENT: CRM - "Export" customer list

ENHANCEMENT: CRM - Disable Edit for normal users when the prospect is not theirs

ENHANCEMENT: CRM - Salesperson Reference - Users can be assigned to multiple Salesperson initials; to filter the customer list.

Setup is done under the "Administration" menu - "Salesperson Reference" option

ENHANCEMENT: CRM - Customer -> Product drill down

ENHANCEMENT: CRM - Move user definable info, contacts, phone numbers, notes from Prospect -> Autopoint customer

ENHANCEMENT: CRM - Reason code for notes (user definable code list)

ENHANCEMENT: CRM - Customer Analysis (Period 1 vs. Period 2) from Customer update form

ENHANCEMENT: New security option in User Groups - "Disallow Company Change" and "Disallow Branch Change"

Version 1.13 - Build 1114

BUG FIX: A/R - Missing type "D"

ENHANCEMENT: Show hits on Sales by Product

ENHANCEMENT: Show hits on Customers->Product

Version 1.13 - Build 1105

BUG FIX: A/R balances off where partial payments applied against a credit

ENHANCEMENT: A/R aging list - A/R processing occurs only once per day

Version 1.13 - Build 1022

BUG FIX: Inventory List - Not respecting branch on drill down

BUG FIX: Inventory Turns - Not respecting branch on drill up

BUG FIX: Customers -> Products not respecting branch flag

BUG FIX: Summary Page not respecting "ALL" branch flag

BUG FIX: Inventory Turns not calculating correctly

BUG FIX: Demand history not working

ENHANCEMENT: Custom Reports - Add "Not Like" to the list of filter operators

ENHANCEMENT: Add Qty Sold to Sales Intelligence; Product Sales, at the Part Number level

Version 1.13 - Build 1017

BUG FIX: Custom Reports - Field for the report name was one character too short

BUG FIX: Custom Reports - Exporting a query missed some of the "Case" information.

Version 1.13 - Build 1016

BUG FIX: Icon for Rename Custom reports is the incorrect size

CHANGE: Move settings for breaking the summary into categories into an "Admin" accessible area

ENHANCEMENT: Qty Shipped to Customers -> Products

Version 1.13 - Build 1015

CHANGE: Inventory Turns - by Product Line not line abbrev

ENHANCEMENT: Inventory Turns - Added line description to level 3 of drill down

Version 1.13 - Build 1011

BUG FIX: Customer list not resizing correctly

BUG FIX: Customer -> Product list not resizing correctly

BUG FIX: Inventory List - Resizing
BUG FIX: Salespeople - Drill down to last level; not disabling drill forward arrow
BUG FIX: A/R column resize after returning from Invoice
ENHANCEMENT: New A/R Filters - Over 30 and Over 60
ENHANCEMENT: New summary screen
ENHANCEMENT: Sales Information can be broken down by Cores, Labour, Special, and Parts
ENHANCEMENT: Added a check box to the sales summary to not show excluded items

Version 1.13 - Build 1008
BUG FIX: Adding a user to the user list is not updating the role / group privileges - when the role already exists (for HDES, for example)
CHANGE: Rearrange the Summary page to accommodate new flags
ENHANCEMENT: New flags for summary sales - Cores and Specials
ENHANCEMENT: In Filter - Check box to trigger a user entered value on a report
ENHANCEMENT: A/R - Branch / Customer range for A/R processing

Version 1.13 - Build 1001
BUG FIX: Some customers not displaying properly (needed to check for NOT XFER OR NULL)
CHANGE: Reorganized the Filter options in the Custom Report section - simplify and make easier to follow

Version 1.13 - Build 0930
BUG FIX: branch tied to company
CHANGE: Version checking when opening E360 (check required table version)
ENHANCEMENT: DEFAULTS for connection
ENHANCEMENT: DEFAULT user group for full access
ENHANCEMENT: New flag for HDES integration
ENHANCEMNET: New flag to separate parts / labour sales

Version 1.13 - Build 0919
BUG FIX: Sales with Kit discounted not calculating correctly
BUG FIX: Sales by Customer - Company ID not being set
BUG FIX: Inventory Turns - Branch not being set
BUG FIX: Inventory Turns - Calculations not being cleared correctly

Version 1.13 - Build 0917
ENHANCEMENT: New Drill down in Business Intelligence - Customers -> Product
   This drill down allows you to view a customer's sales; broken down by product line, all the way to the invoice level.

Version 1.13 - Build 0913
ENHANCEMENT: CASE statement - compare something and depending on value make it something else

Version 1.13 - Build 0909
BUG FIX: Customer Sales Analysis - Separate table - was using same as Sales by Customer (cussum)
BUG FIX: Customer Sales - Drill down not always using the correct year / month
ENHANCEMENT: Part description shown when drilling into Invoice details on Customer Sales (Business Intelligence)
ENHANCEMENT: Part description shown when drilling into Invoice details on Branch Sales (Business Intelligence)
ENHANCEMENT: Part description shown when drilling into Invoice details on Salesman Sales (Business Intelligence)
ENHANCEMENT: Part description shown when drilling into Invoice details on Product Sales (Business Intelligence)

Version 1.13 - Build 0905
CHANGE: Internal Clean up (dictionary)
CHANGE: 61E48 when exporting to Excel turns into scientific notation.
Modify the Send-To template on inventory to send part numbers as text

Version 1.13 - Build 0903
CHANGE: License checking updated and optimized
CHANGE: Summary Screen Refresh
CHANGE: Rename "Query Tool" to "Custom Reports"
ENHANCEMENT: Implement "Private Report" option - users can mark reports as private, limiting the visibility of the report

Version 1.13 - Build 0830
CHANGE: Resize changes on Query screen
ENHANCEMENT: User File flag for "Advanced Query" mode.
Also a flag on the query screen and a button to make default;

Version 1.13 - Build 0816
CHANGE: Version and Build number are now variables (set in "SetVersionInfo" procedure), so they can be written to a text file for script use
ENHANCEMENT: New Sales Intelligence item - Customer Analysis - Shows Customers who's Sales or Profits are up or down - periods are user defined.

Version 1.13 - Build 0813
BUG FIX: Query Tool: Fields not saving correctly when updating an existing saved query
BUG FIX: Column Names not displaying correctly when drilling into Customer Sales (Business Intelligence)
ENHANCEMENT: System setting to use the workstation user login name
ENHANCEMENT: User account information is updated in E360 as well as on the database server (they are kept in sync)
ENHANCEMENT: Add Sales % (weight of this customer's sales vs. the total sales) to customer list
ENHANCEMENT: Search for customer in Customer Summary (Business intelligence)
ENHANCEMENT: Query Tool: Can Limit Query Results
ENHANCEMENT: Query Tool: Fields can now sort in descending order

Version 1.13 - Build 0710
ENHANCEMENT: Revamped the "Inventory Turns" procedure, optimized the process for speed.

Version 1.13 - Build 0705
BUG FIX: Access Violation - Sales Summary
BUG FIX: Top 20 Sales - not passing company information for transactions
CHANGE: Database connections are now user based
ENHANCEMENT: Summary graphs are now changeable from line, to bar, or paretto

Version 1.13 - Build 0606
BUG FIX: Top 5 Customer Graph - Error if the customer name had a ' (quote) character in it
ENHANCEMENT: More descriptive titles on screens
ENHANCEMENT: Security functionality
Security is done by group - all settings are set in the group
Users need to be added to a group
ENHANCEMENT: Modify the "Summary" query - The inventory value and A/R calculations are not done when just the date range changes - only sales are affected

ENHANCEMENT: Status Window (Loading Data...) is now used whenever a dashboard window is updated
      Modified how this window is called and closed
ENHANCEMENT: 5 Year Summary graph now operates on "Calendar Year" instead of rolling to make the graph easier to read
ENHANCEMENT: Modify the 5 Year Summary graph - Do not rerun the query when the type is changed (sales, costs, margin) as those values are already there.
      Just reset the queue and reset the graph
ENHANCEMENT: All queries checked for optimization

PROGRAMMING NOTES:
CHANGE: Change program from a single exe to a DLL style application, with each section broken into its own app.

Version 1.13 - Build 0524
BUG FIX: Invoice Total when viewing an invoice did not include the second tax
ENHANCEMENT: Optimization of Inventory totals for Summary Screen
ENHANCEMENT: Add Demand History 36 months

Version 1.13 - Build 0517
BUG FIX: Invoice Lookup was not including tax when comparing invoice values
      Added date to Invoice Lookup
      Amount compared now +/- 1 cent to account for rounding differences
ENHANCEMENT: Improvements to the A/R queries
      Re-factor A/R summary and details to use the same code.
      Changes to payment application resulted in a significant speed improvement

Version 1.13 - Version 1.13 - Build 0510
ENHANCEMENT: Inventory Turns - drill down
      Shows inventory turns for replacement and average cost; by year and by period (date range selected)
      Starts at the branch level; then drills to product group level; product line, and then part number
         You can drill from a part number to it's history
ENHANCEMENT: Top Toolbar (date ranges) now allows Tab/Shift tab to move through fields

Version 1.13 - Build 0507
CHANGE: Security and Licensing restrictions
      License file now checked for license count and expiry date
ENHANCEMENT: 5 Year Summary Graph can now display "Sales", "Costs", "Profit", or "Margin"
ENHANCEMENT: Speed improvement - 5 year summary graph
ENHANCEMENT: Speed improvement - Top 5 branches graph
ENHANCEMENT: Speed improvement - Top 5 customers graph

Version 1.13 - Build 0424
BUG FIX: Query Tool - Results not correctly displaying decimal places
BUG FIX: Query Tool - Results not displaying negative values
BUG FIX: Query Tool - Corrected issues with XML export
BUG FIX: Query Tool - Using 'TODAY - xx' not working for date
BUG FIX: Query Tool - Removing a column from the query where it was there more than once cleared the flag, even if the field still existed in the query
CHANGE: Added F12 and F8 hot keys to filter editor
CHANGE: Updated colours on "Browse Saved Queries" screen
CHANGE: Updated layout on the "Filter" form for tagged fields to accommodate the extra options added
CHANGE: Loading a query clears the results list and resets the headers
ENHANCEMENT: Query Tool - "BETWEEN" operator can now use values other than dates

ENHANCEMENT: Query Tool - User definiable Column Names in saved queries
ENHANCEMENT: Query Tool - Math functions (PLUS, MULTIPLY BY, MINUS, DIVIDE BY)
ENHANCEMENT: Query Tool - Math Functions can also have Aggregation applied to them

Version 1.13 - Build 0328
ENHANCEMENTS: Query Tool
      1.   Fields can be added to query multiple times
      2.   Can toggle OR statements wrapped in brackets
      3.   Preview button (Amador security only) - Outputs query without running it, to a message box (can copy/paste from it)
      4.   Amador Menu - User Query -> SQL Script
              Creates a script of the query so queries can be added to other autopoint databases as a saved query
      5.   Export Query button from the Query Tool - Same as the User Query -> SQL Script, but takes the current query
      6.   Add AVG function to Query tool
      7.   Add Aggregate type to Excel Export header

Version 1.13 - Build 0318
BUG FIX: Correct Position of the "Age from Previous Period" check boxes when scaling size
CHANGE: Modified the way the save/restore window positions work to correctly function with more than one monitor.

Version 1.13 - Build 0304
BUG FIX: "Back" button not disabling correctly in Inventory (when you are at the topmost level)
BUG FIX: Inventory filter sometimes losing it's place
BUG FIX: Connection Info (Amador Menu) - check Postgres Version before query
ENHANCEMENT: Add a switch to the A/R screens to show "Aged as of" the Previous Period

Version 1.13 - Build 0301
ENHANCEMENT: Add "Count" function to Query tool

Version 1.13 - Build 0227
CHANGE: Aging date now calculated from period information in company record

Version 1.13 - Build 0221
BUG FIX: Filters not resetting correctly on Inventory Drill down level 3 and 4

Version 1.13 - Build 0114
ENHANCEMENT: A/R Search now seaches for customer name, customer abbrev, and Customer Number
ENHANCEMENT: Added column resizing to invoice drill in
ENHANCEMENT: Added total checking on invoice drill in to more specifically get the invoice

Version 1.13 - Build 0111
CHANGE: A/R List - Invoice drill down now checks the invoice number, customer number, and date for a match before displaying an invoice
ENHANCEMENT: Drilling back to the A/R list first level places the list at the customer from the drill down

Version 1.13 - Build 0104
BUG FIX: Date Range for "Previous" failing after year end

Getting Started

Getting Started

There should be an installer on your system under the Amador, Evolution folder, for E360.

As well; E360 requires the PostgreSQL ODBC driver to be installed on your system for E360 to be able to connect to the PostreSQL database. This driver is normally in the folder with E360 and can be run when needed. It does not require any specific settings, just that the driver be installed on your system. This process should normally occur when the E360 installer is run; but it can be run separately if required.

E360 requires a license for each user that will be accessing the system. Please contact our sales department if you require licenses.

There are two difference licenses required for E360, depending on your needs.

E360 requires one license for the **Dashboard, Custom Queries** and **Advanced Inventory**, and a separate license for the **CRM** portion of E360.

To get started with E360 you must set up some basic portions of the program.

User Groups, User Accounts, Administrative Tasks.

These are the core pieces to get started running E360 on your system.

These functions are described in the "Setup and Security" section.

System requirements

System Requirements

Server
Autopoint Evolution
Postgres 9.2 or greater
Autopoint SQL license

Client
Windows XP or greater
512MB of RAM
50 MB of hard disk space
Postgres ODBC driver

Exporting
E360 allows you to export several of your lists to Microsoft Excel (c), Microsoft Word (c), Text File, printer, XML, or PDF.

If you want to export to Excel, you will require Microsoft Excel 2003 or greater.
If you want to export to Word, you will require Microsoft Word 2003 or greater.
If you want to export to PDF, you will need a PDF viewer in order to see your PDF.

Getting help

Getting Help

If you have any questions regarding the product; please contact Amador Business Computers at: 1-888-826-2367.

You can also send an email to our support department: support@amador.ca

You can also contact us via our website: http://www.amador.ca

Administration - Setup and Security

Administration.
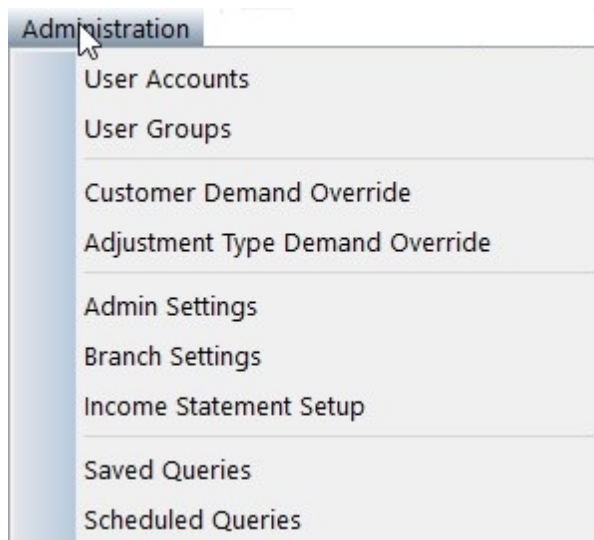
The "Administration" menu allows you to define your user groups and accounts, to set up certain types of inventory demand over-rides, modify your settings to include or exclude certain types of sales, as well as manage your "Saved Queries", including what queries are currently scheduled.

User Accounts

User Accounts

The user list shows you who has access to your Evolution 360 tool; and what access group they belong to.

As you can see; the user name, the company and branch they default to, and their group security is displayed.

*** New in 0525 Build ***
  - You can also see a column called "CRM User". This denotes that when this user logs in, they will require a CRM License. If this is in error, you may have to adjust your group security settings, or the user account.

To update a user's account information, highlight the user in the list, and click the "Edit" button; or, you can also double click on a name to edit it.

To add a new user; click the "Insert" button, or press the "Insert" key on your keyboard.

To remove a user; highlight them in the list, and click the "Delete" button, or highlight the user, and press the "Delete" key on the keyboard.

To change someone's password (database server security), highlight their name and click the "Reset Password" button. This button does not affect the users if they are using domain logins.

Update User Account

Updating a user account.

Type in a user name; and then select the company and branch they will normally be associated with. This does not restrict them to a particular branch and company (that may change in the future, but it will then depend on their security level), but when they first enter the program and the summary loads; this will predetermine the information.

Most users should be set to "Normal" for their security level; this then uses their user group to determine what they have access to. The "Administrator" level specifies that the user can see the "Administration"

menu; which includes access to the user and group accounts; as well as the ability to rename or delete saved "Custom Reports".

If this user is using the "Custom Queries" section; they may want to be in "Advanced Query mode". This enables some of the more sophisticated features of the "Custom Queries" tool.

If this user will be using the CRM features of E360 (including E360Mobile), check mark this box to enable this user as a CRM user.

User Groups

User Groups

User groups are used to determine security for users; rather than having to set each user's security uniquely.

Group Description	Dashboard	Sales Analysis	Business Intelligence	A/R	A/P	G/L	Inventory	Purchases	Custom Queries	Advanced Inventory	Customer Management
ACCOUNTS RECEIVABLE	✓		✓	✓							
ADMINISTRATOR	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
BUSINESS DEVELOPMENT	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
BUSINESS DEVELOPMENT LEVEL 1	✓	✓	✓				✓	✓	✓		
MANAGER	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓
SALES GROUP - LUBES	✓	✓									✓
SALES GROUP - NMA	✓	✓									✓

This list describes each group, as well as what basic features users in the group will have access to.

To add a new user group; click the "Insert" button or press the "Insert" key.

To edit an existing group, highlight it in the list; and click the "Edit" button, or double click the group.

To remove a group; highlight it in the list, and click the "Delete" button, or highlight the group, and press the "Delete" key.

Update User Group

Update User Group.

When you are setting up your user accounts; you add each user to a security group; which is what determines their security within E360.

Editing a user group is as simple as adding (or modifying) the Group Description, and then clicking the features users inside this group will have access to.

You can pick individual portions of each category (Summary, 5 Year Summary, etc.) or, just click the header: Summaries and Graphs (All) if you want this group to be able to access everything under that category.

Custom Queries

Custom Queries - This must be checked for users in this group to see the "Custom Queries"
     Custom Queries are Read Only - This means the user can run existing queries assigned to them or are "Pubic". They can not create or modify queries
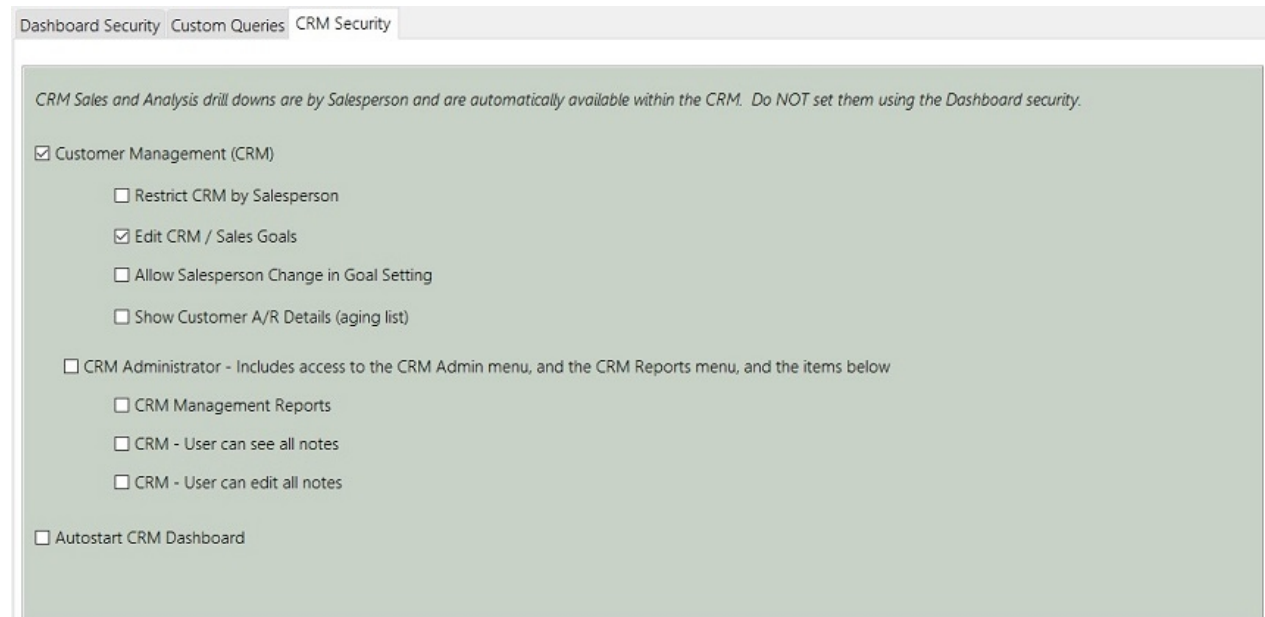
Schedule Administration:
The users in this group can modify or add schedule information for existing scheduled queries

Schedule Queries:
If this is checked; the users in this group can schedule queries

CRM Security

The CRM security is set up in this tab. Toggling the first option enables the CRM; but remember the user also still has to be marked as a "CRM User" in their user account. This area sets the security up for CRM users.

If you don't enable something in a category, that button will not appear on the dashboard for users within this group.

CRM Administrator - This allows the user to act as an administrator within the CRM portion of E360; but not other portions.
 You can also selectively turn on portions of the administration access.

 CRM Management Reports - Allows access to the CRM Administration Reports
 CRM - User can see all notes - This user can see all other user's customer notes
 CRM - User can edit all notes - Normally; a user can only edit their own notes. This overrides that behavior.

Once you make your changes, make sure to click the OK button to save your changes.

Customer Demand Override

Customer Demand Override

This allows you to specify customers to include in the demand calculations used in the "Advanced Inventory" section.

To add a customer; click the "Insert" button, or press the "Insert" key. This will open the editing window.

Select the company and branch this override will apply to, and then add the customer. To look up the customer; click the button beside the "Customer" field.

Adjustment Type Demand Override

This section allows you to add user entered adjustment types so you can include them as demand in the demand calculations used in the "Advanced Inventory" section..
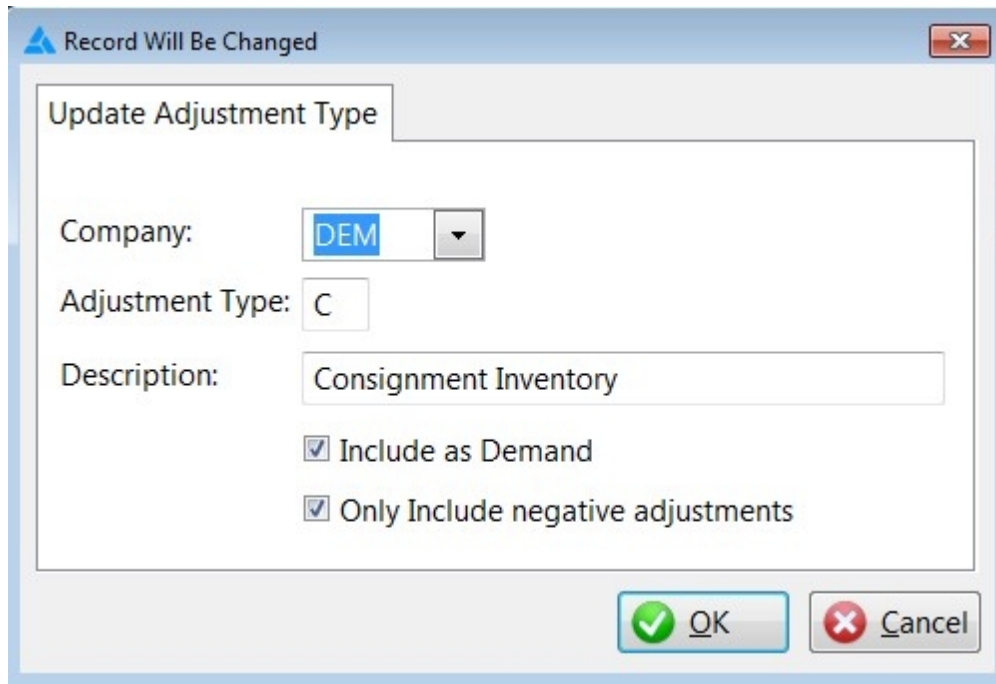
To add a new "Adjustment Type" over-ride; click on the "Insert" button; or press the "Insert" key on your keyboard.
To edit an existing Adjustment Type; double click the item in your list, or highlight it, and click the "Edit" button.

This will bring up the edit window. Select the company you wish this adjustment to apply to, the adjustment type, a description, and how it should affect demand.
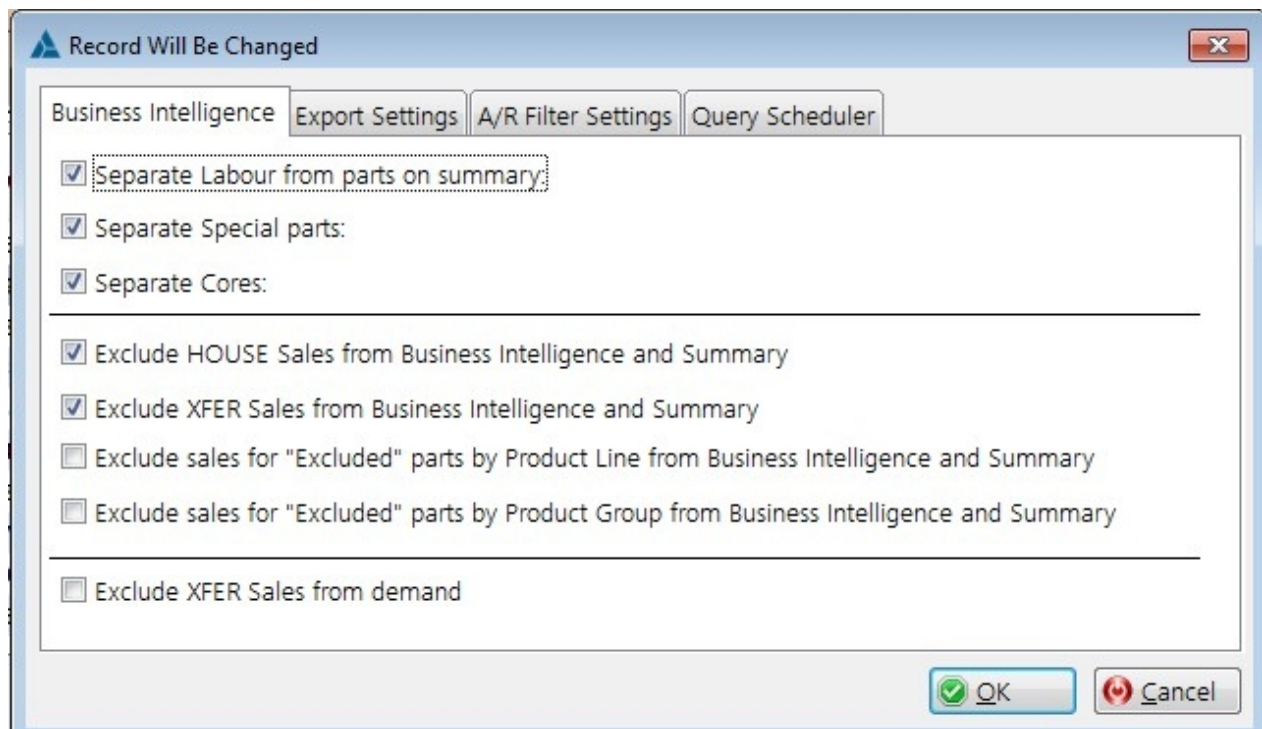
Click "OK" to save your changes, or "Cancel" to abandon the changes.

Admin Settings

Admin Settings

The top 3 settings affect the summary page only; the exclusions affect other portions of E360. You can chose to show your summary sales information as a single line, or as separate lines for each type of sale listed above, plus normal "parts sales".

SALES INFORMATION					☐ Show Without Excluded
Sale Type	Net Sales	Sales	Returns	Gross Profit	Margin
Parts	1,005,922.87	1,041,359.85	-35,436.97	174,602.95	17.36%
Labour	6,412.64	6,421.14	-8.50	3,611.24	56.31%
Cores	906.00	2,536.00	-1,630.00		
Special	5,421.51	7,882.90	-2,461.38	1,023.33	18.88%
TOTALS:	**1,018,663.03**	**1,058,199.89**	**-39,536.86**	**179,237.52**	**17.60%**

You can toggle off each of these different types if you want to display your sales as less rows of information. It does not affect the totals; just how the sales information is displayed.

Excluding Sales from drill downs and dashboard information.

"Exclude HOUSE Sales from Business Intelligence and Summary"
● This setting excludes sales to customers marked as type "HOUSE"

"Exclude XFER Sales from demand"
● This will remove any sales to "XFER" type customers from demand calculations. XFER type customer's are automatically excluded from sales.

"Exclude sales for "Excluded" parts by Product Line from Business Intelligence and Summary"
● This will exclude any sales for items in product lines that are marked as "Exclude from gp totals"

"Exclude sales for "Excluded" parts by Product Group from Business Intelligence and Summary"
● This will exclude any sales for items in a product group that are marked as "Exclude from gp totals"

Branch Settings

This section allows you to specify the different profit centres from your General Ledger. This is used on the Accounting Drill downs for filtering.
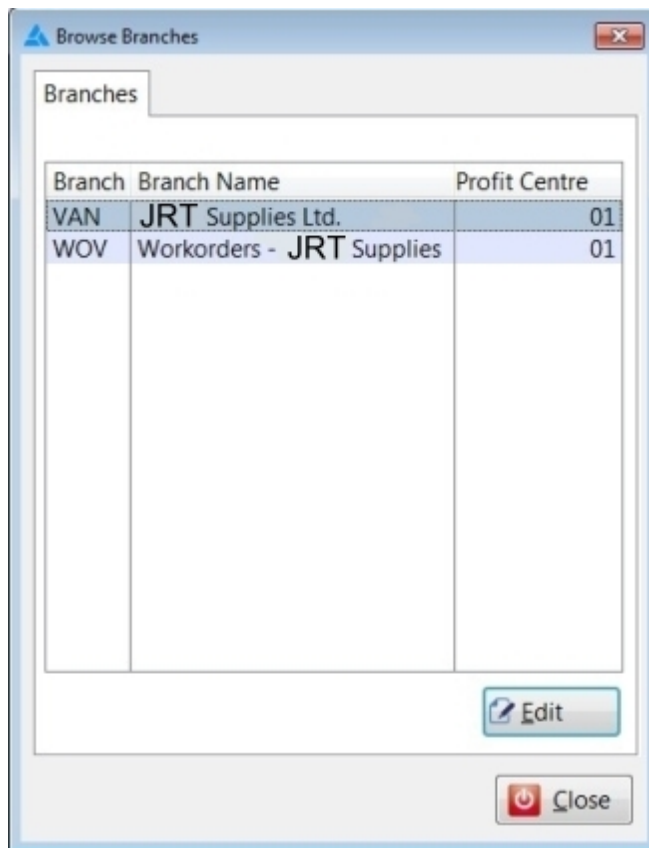
To specify a profit centre for a branch, highlight the item, and click the "Edit" button, or double click the row you would like to edit.

The editing window will open, allowing you to specify your profit centre; which is the last section of your G/L Account number.
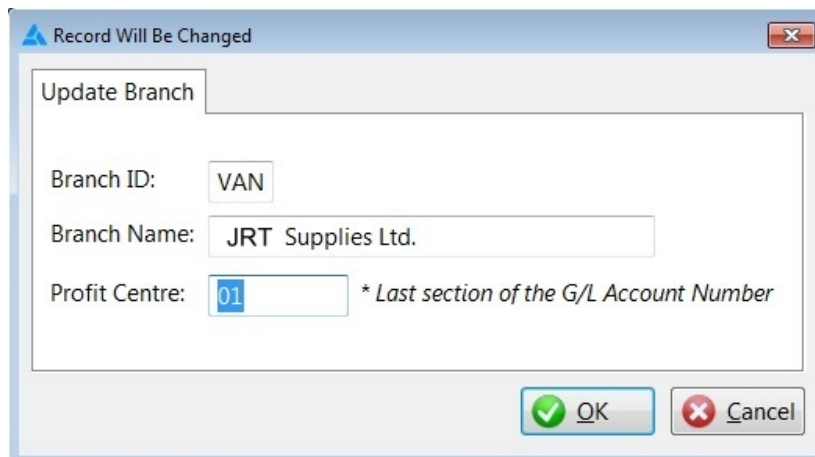
Income Statement Setup

This section allows you to modify the settings for your custom income statement.

The custom income statement is the same as the normal income statement; however, here you can specific accounts to exclude from it.

To exclude accounts from your custom income statement; click the "Insert" button to add a range of accounts to exclude. You can also edit or remove any ranges you define.
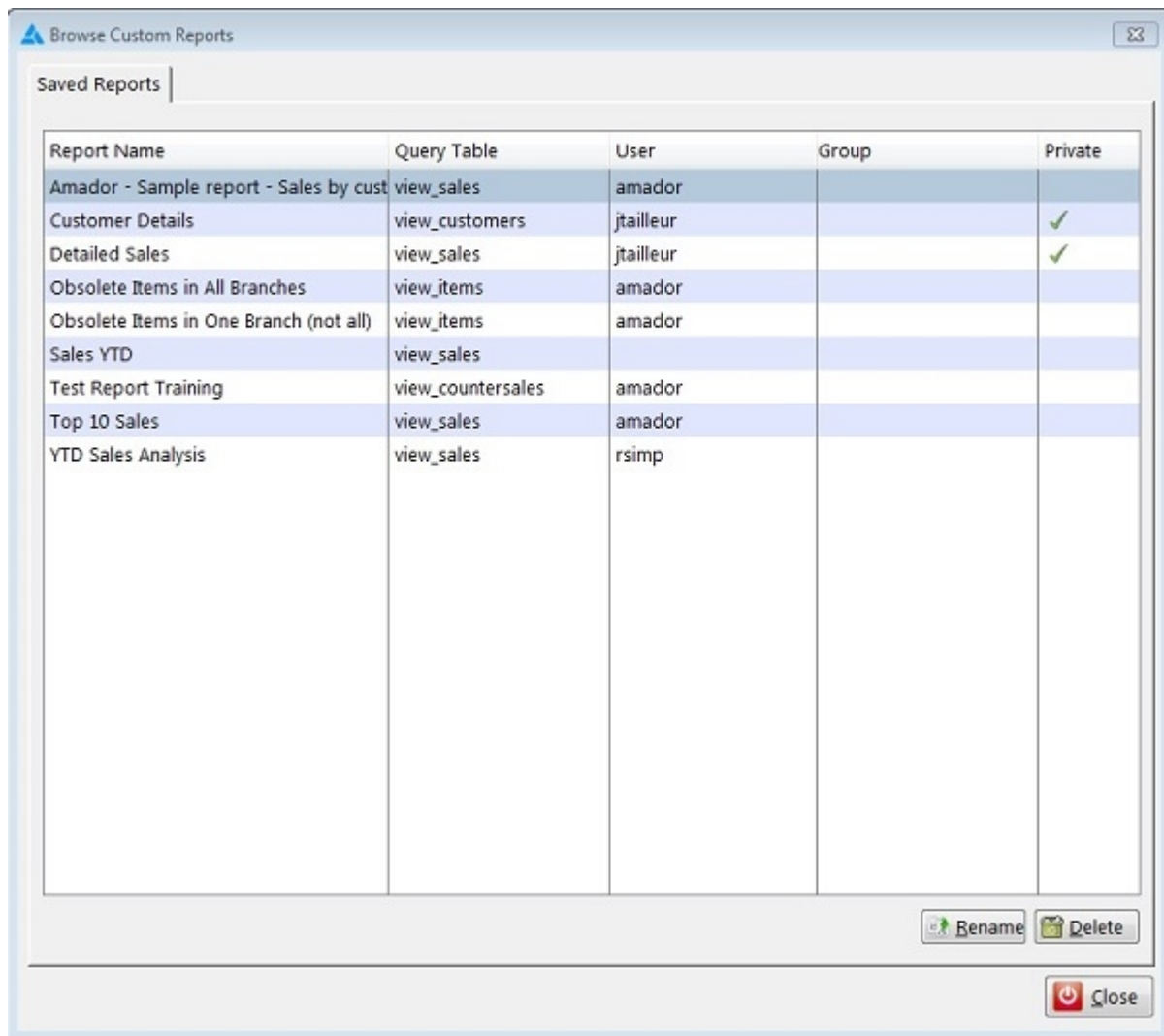
If you want a single account number excluded; simply use the same account number for the start and end.

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Saved Reports

Saved Reports

When under the administration menu, you can modify certain portions of a saved report.

You can rename an existing report, or delete it, or you can modify who the report belongs to, and if it is private or public, or group specific.

Scheduled Queries

Scheduled Queries

CRM Administration

CRM Admin

The CRM Administration menu is used for setting up and maintaining the CRM system.
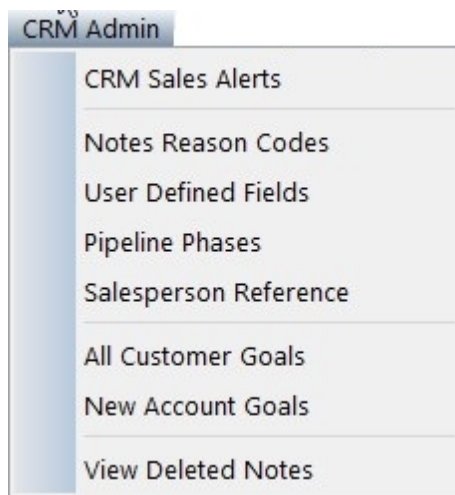
CRM Sales Alerts

● Sales Alerts show on the CRM Dashboard for each salesperson. They are only definable within the CRM Admin menu; and are date sensitive (start date and end date), and are only displayed when appropriate.

Notes Reasons

● This is where you define the "Reason Codes' the user adds to their notes when they create them

User Defined Fields

● This area allows you to define custom tabs and fields to use in the CRM. Up to 4 tabs can be defined, with up to 10 fields under each tab

Salesperson Reference

● This is where you define the mapping between an E360 user and the salesman code in Evolution

All Customer Goals

● A list of all goals currently defined for all customers

New Account Goals

● All currently defined goals (by salesperson and product group / line) for new accounts
  ○ Customer's are not listed as these are designed for accounts you may not currently be aware of
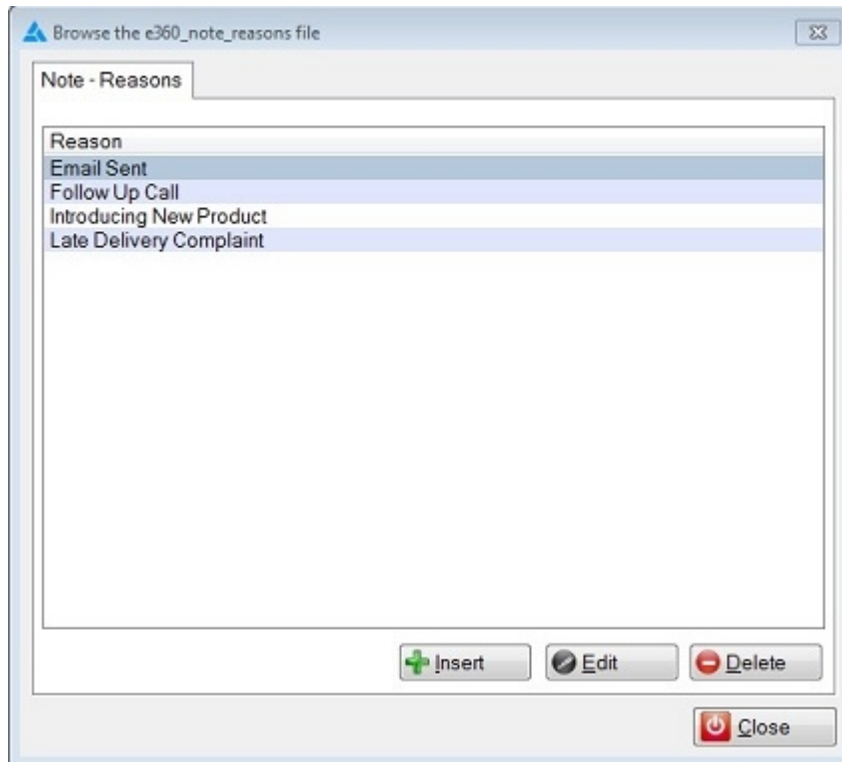
View Deleted Notes

● When notes are "deleted" by a user; they aren't removed, they are simply filtered out.
  ○ Use this function to view notes users have deleted

Notes Reasons

Notes Reason Codes

This is where you define the "Reason Codes' the user adds to their notes when they create them.

As you can see; these "Reasons" then appear in your notes and allow you to track the notes by code.

User Defined Fields

User Defined Fields

This area allows you to define custom tabs and fields to use in the CRM. Up to 4 tabs can be defined, with up to 10 fields under each tab.

Each field must have a type, and a size.

The field "Types" are as follows:

1. **DROP BOX** - This is a field that allows you to have a selection box that the user selects values from.

   - Click on the down arrow button beside the field length to add choices to the drop box.

   Editable: If you tick the "Editable" check-box, that means that the user will be allowed to add choices to the list if they type in a choice that is not currently in the list.

   Be careful with this option as you could end up with a list with the same option spelled different ways.

2. **TEXT** - This is an entry field; the user can type anything they would like into this area.

3. **DATE** - This field can only contain a date.

4. **NUMERIC** - This field can only contain numbers. This field can hold numbers up to 15 significant digits, and up to 2 decimal places.

Salesperson Reference

Sales Person Reference
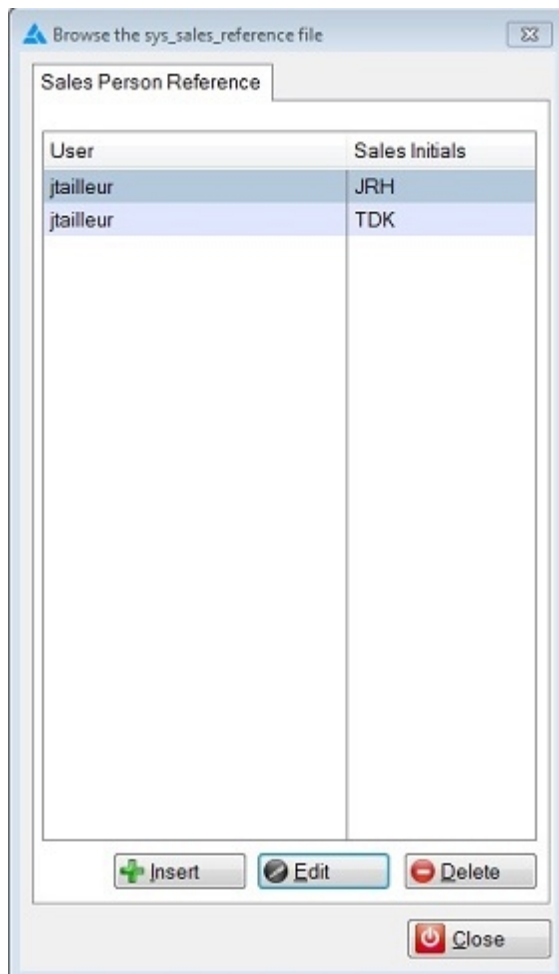
This is where you define the mapping between an E360 user and the salesman code in Evolution. A user account in E360 can be linked to more than one set of Salesman initials; and more than one user account can point to the same set of "*Sales Initials*".

All Customer Goals

All Customer Goals

Goals are defined by customer; from within the CRM. This lists all goals currently defined for all customers; so you don't have to go into each customer to see the goals.

You can edit existing goals here, but to create new ones, you must do that through the CRM section, as goals need to be applied to a specific customer.

New Account Goals

New Account Goals

This is where you define your new account goals, by salesperson and product group / line.

To add a new goal; click the "Insert" button, or press the "Insert" key.

Pick the sales person, type in the goal year, and then select the product group / line, and then your sales goals.

For sales to show up in the "New Account Goals vs. Sales" drill down, you must also flag customer's in your Customer list (in E360) as a "New Account".
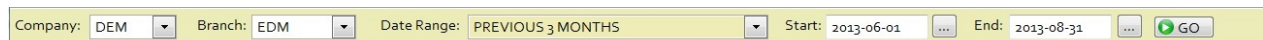
Dashboard

Dashboard

E360 - Adds another dimension to your reporting and data analysis tools for Amador's Evolution. The Dashboard is a large part of this data analysis; allowing you to view your sales, A/R, and Inventory in different styles, and providing you with a way to drill down to different pieces of your information.

The dashboard consists of several different sections. Each of the dashboard items uses the Toolbar at the top of the dashboard screen to determine the dates used, as well as the company and branch displayed.

The Top Toolbar

The Left Toolbar

The dashboard items are selected from the buttons along the left side of the dashboard. When you click on the button, a menu is displayed showing the items under each category.

This "**Summaries and Graphs**" section includes the summary page (AKA - "The Dashboard") a 5 Year Summary graph, and several "Top 10" graphs.

	Dashboard Summary
	5 Year Summary Graph
	Top 10 Sales by Salesperson
	Top 10 Sales by Customer
	Top 10 Sales by Branch
	Top 10 Sales by Product Line
	Top 10 Purchases by Product Line
	Top 10 Purchases by Supplier

The "**Business Intelligence**" button allows you to access the various Business Intelligence drill downs.

The "**Sales Analysis**" button provides access to the various analysis style drill downs (period 1 vs. period 2). These are all based on two date ranges you key in, and then run the comparison. By default; period 1 is set 1 year before the Start / End date you current have specified in your top toolbar. However; you can put any dates into your period 1 and period 2 ranges; as they are completely separate from the toolbar, other than just to set the initial dates.

The "**Inventory**" button allows access to the inventory drill-downs.
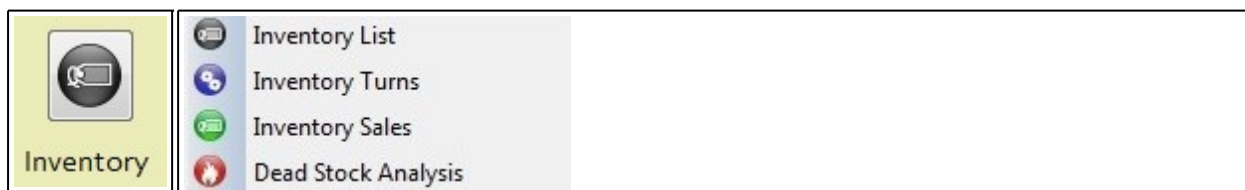
The "**Purchasing**" button shows you the available purchasing drill-downs.
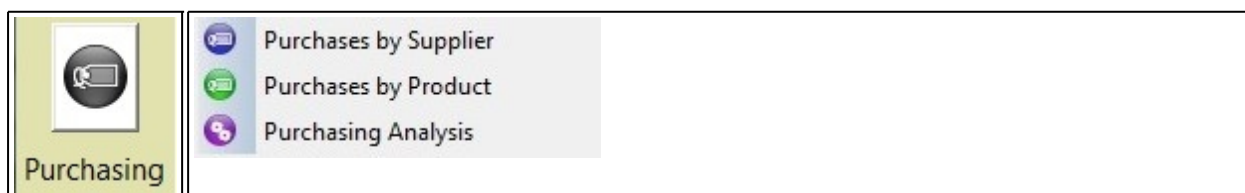
The "**Accounting**" button contains the various accounting Drill Downs.
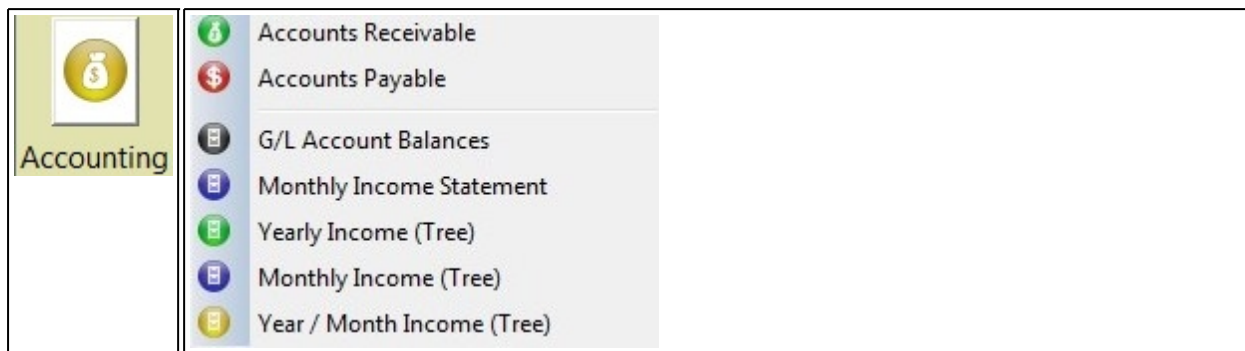
Summary

The Summary - "The Dashboard"

Typically when you start E360; you will see the "Summary" page. This shows you sales month to date; current inventory levels, current Accounts Receivables level, and a 13 month history of sales (current month, and previous 12 months).
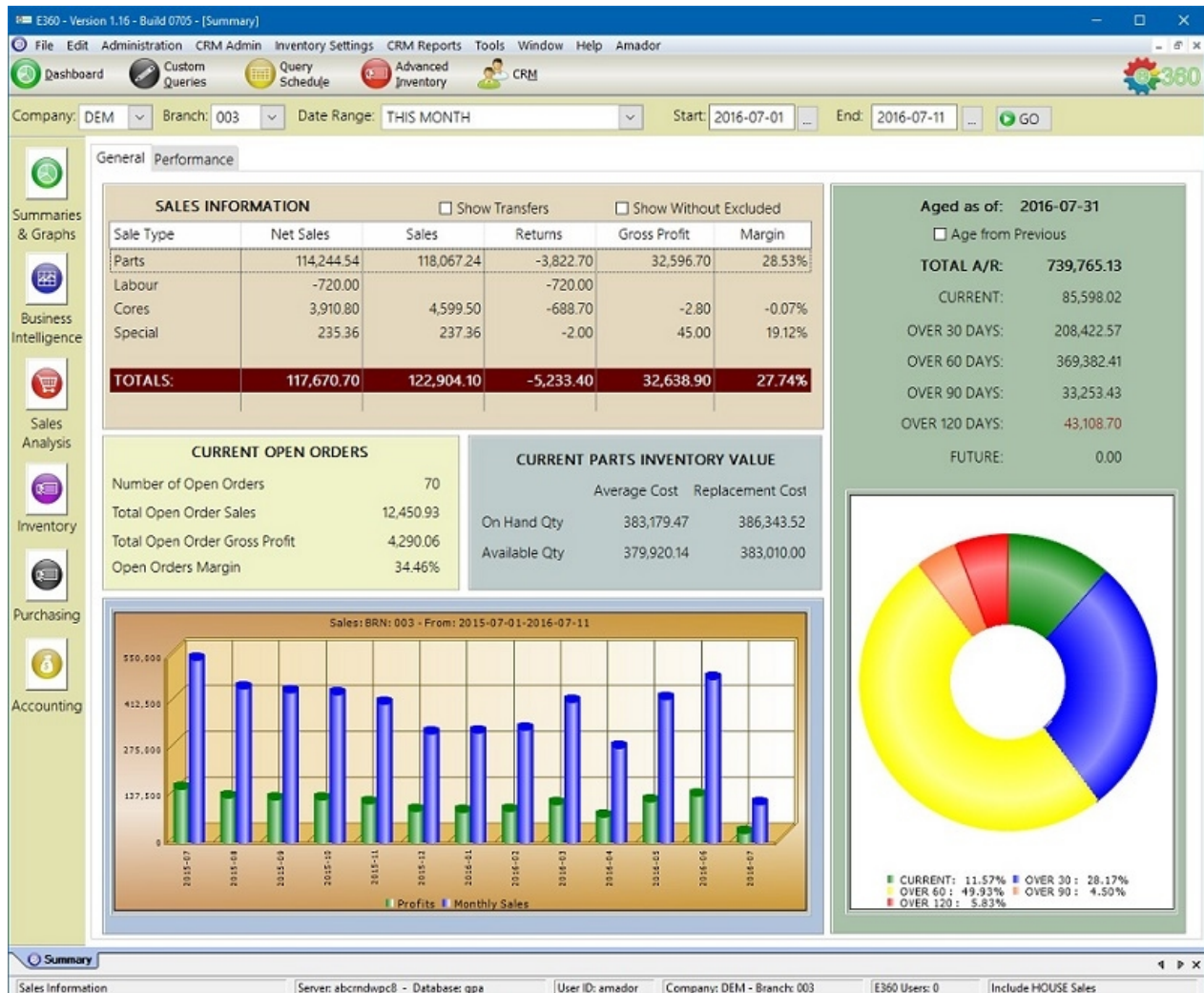
If you want to change the sales summary information; you can use the top toolbar to select a different company, branch, or date range. To change the date range, you can select a predefined date range from the drop down list; or you can key in a start and end date to select something custom.

Date ranges are not saved from session to session.

When you go into E360, it will default to the current month (from the 1st of the current month, to the current day).

Graphs

Summaries and Graphs
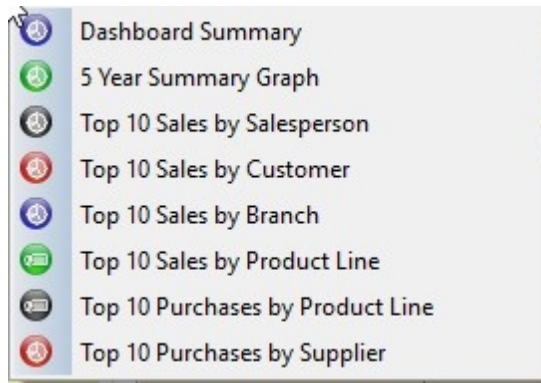
This area allows you to view your data in a graphical fashion.

To change the company; use the toolbar at the top of the dashboard to select a different company.

To change the date range; change the "End Date" in the toolbar. The dates for the graphs will be adjusted based on the "End Date" you specified in the toolbar. Most of the graphs are for 12 months.

When you are viewing a graph, you can "Right Click" the graph to change it's type, or save it as a file for use in another program or presentation.

5 Year Summary
Top 10 Sales People
Top 10 Customers
Top 10 Branches
Top 10 Product Lines
Top 10 Purchases by Product Line
Top 10 Purchases by Supplier

5 Year Summary

The five year summary displays a list of sales by default, for the company selected in the top toolbar.
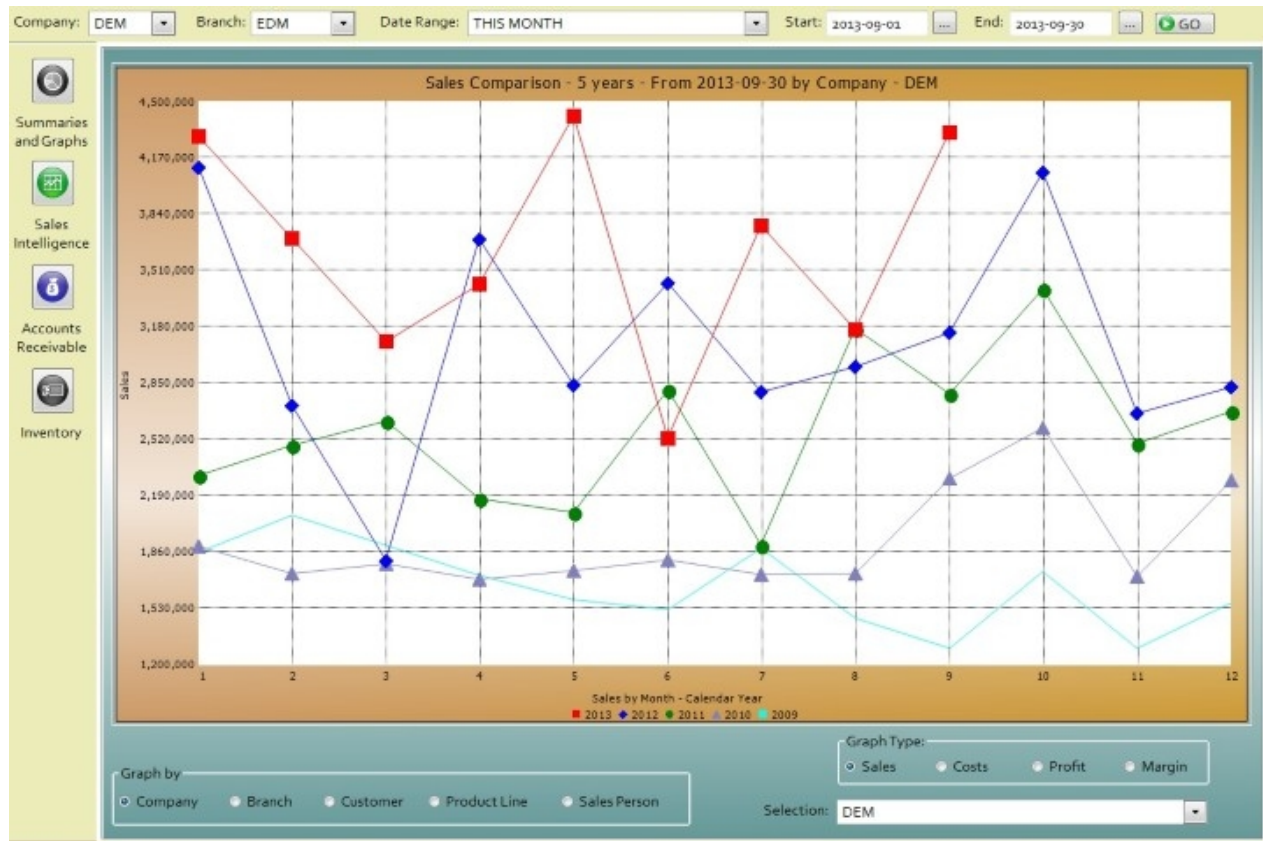
The start date is ignored; but the end date is used to determine the date to go back 5 years from.

If you want to see sales for a particular branch; click the "Branch" radio button, and then select a branch from the "Selection" drop-down box. You must select something in order to trigger an update of the graph.

You can see a 5 year history for a company, branch, customer, product line, or sales person. You can only view one of these at a time.

You can also change the graph type to show sales (the default), costs, profit, or margin.

"Right Click" the graph to change it's type, or save it as a file, for use in another program or presentation

Top 10 Sales People

Top 10 Salespeople
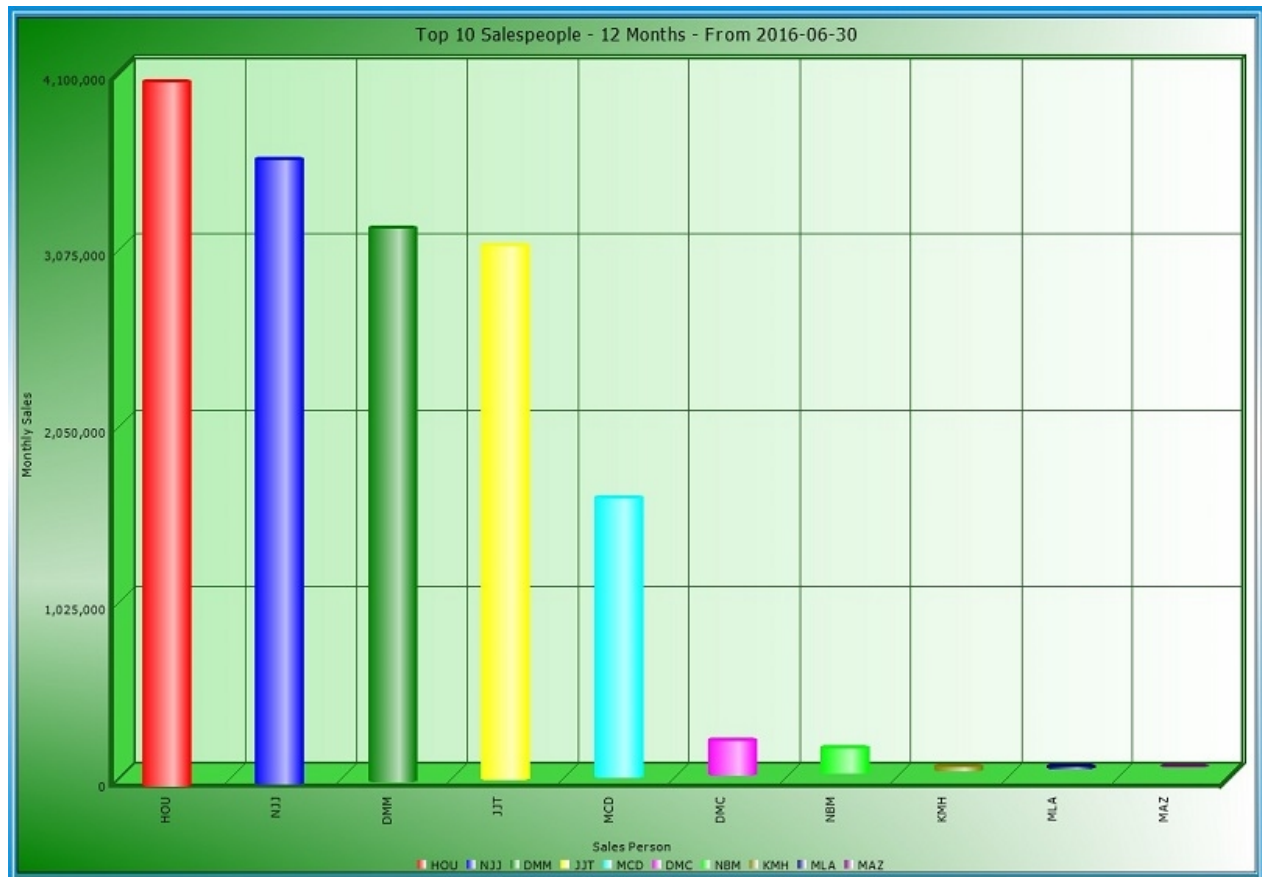
Salespeople

To change the company; use the toolbar at the top of the dashboard to select a different company.

To change the date range; change the "End Date" in the toolbar. The date for the graph will be adjusted to 12 months previous from the end date.

"Right Click" the graph to change it's type, or save it as a file, for use in another program or presentation

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Top 10 Customers

Top 10 Customers

To change the company; use the toolbar at the top of the dashboard to select a different company.

To change the date range; change the "End Date" in the toolbar. The date for the graph will be adjusted to 12 months previous from the end date.

"Right Click" the graph to change it's type, or save it as a file, for use in another program or presentation

Top 10 Branches

Top 10 Branches

To change the company; use the toolbar at the top of the dashboard to select a different company.

To change the date range; change the "End Date" in the toolbar. The date for the graph will be adjusted to 12 months previous from the end date.

"Right Click" the graph to change it's type, or save it as a file, for use in another program or presentation

Top 10 Product Lines

This graph displays the top 10 selling product lines for the previous 12 months from the "End Date".

To change the company; use the toolbar at the top of the dashboard to select a different company.

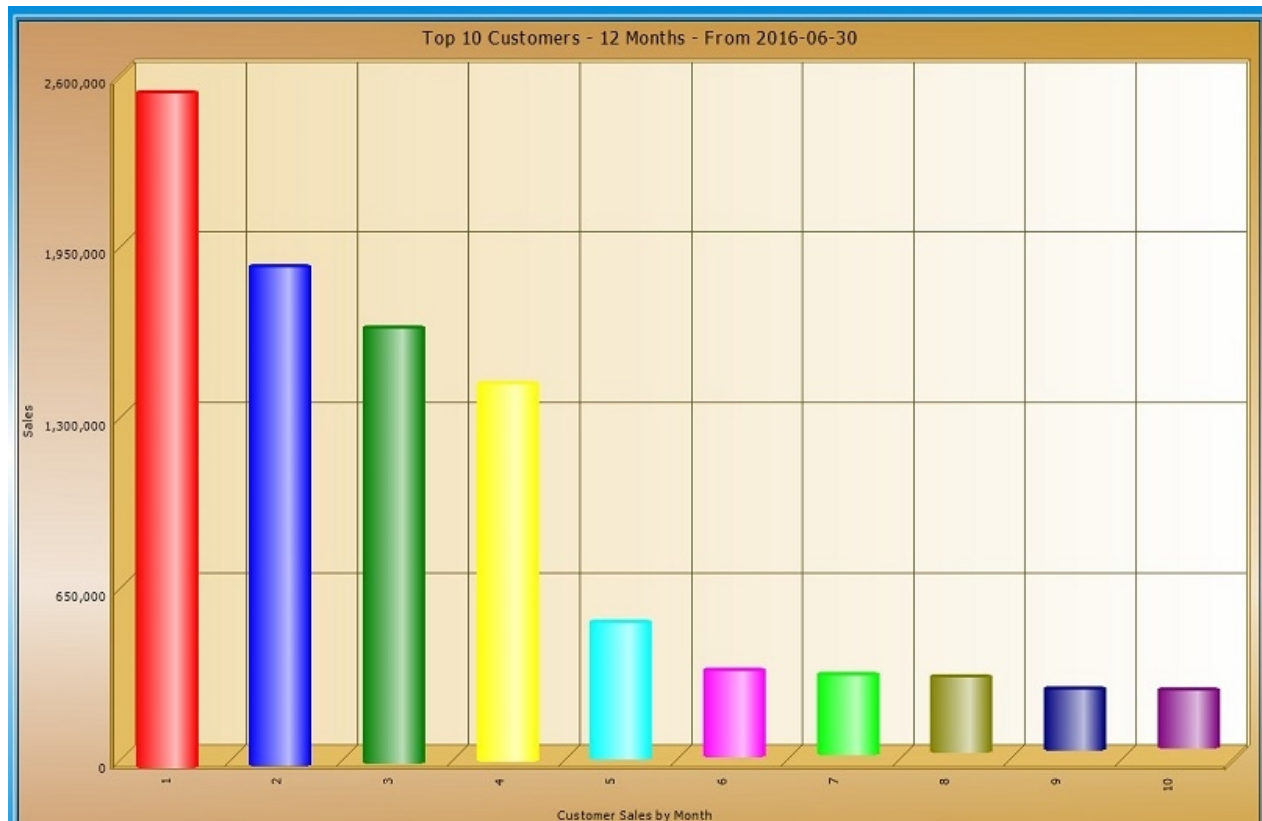To change the date range; change the "End Date" in the toolbar. The date for the graph will be adjusted to 12 months previous from the end date.

"Right Click" the graph to change it's type, or save it as a file, for use in another program or presentation

Top 10 Purchases by Product Line

Top 10 Purchases by Supplier

Business Intelligence

The Business Intelligence area are lists which allow you to drill down deeper and deeper into your data.

To go into a particular area, click on the "Business Intelligence" button, which pops up this list:

Sales by Branch
Sales by Customer
Sales by Product
Top Sellers (Product)
Sales by Salesperson
Sales by Counterman
Sales by Customer Type

Customer -> Product
Product -> Customer

Sales by Branch - To list sales by branch and Month, and then day, and then invoice, and then the parts on the selected invoice; click the "Branch Sales" button.

Sales by Customer - List sales by customer, and then month, and then invoices with the selected month, and finally, the details of the selected invoice.

Sales by Product - List sales by product line, then by part number, and allows you to drill to a part's transaction history.

Top Sellers (Product) - The top 20 parts sold within the Company, Branch, and date range specified in the Dashboard toolbar. You can select a part to view it's transaction history.

Sales by Salesperson - Lists sales by Salesperson, then by customer for the selected salesperson, then by invoice, and finally, the invoice details.

Sales by Counterman - Lists sales by Counterman, with line count and sales amount. Drills down to Customer, then to Invoices for the customer, and then to the invoice details.

Sales by Customer Type - Lists sales by Customer Type, then by Customer for the selected type, then to Product Lines for the selected customer, and then to Parts for the selected product line, and then to invoices for the part selected.

Customer -> Product - Shows sales by customer, and then shows you the sales by product line, and then part number, and finally, the invoice numbers the selected part was sold on, for the selected customer.

Product -> Customer - Shows you the sales by product line, and then, the customers who have bought from that specific product line, and finally the parts from that product line the selected customer purchased.

Branch Sales

Branch Sales

When you first enter this screen, you'll see a list of sales, broken down by branch and by month (if you've selected more than one calendar month).

* To get more information, you can right click the line in the list from a "drill down" pop up menu, you can double click a line to drill down, or you can highlight a line, and press the F2 key, or highlight a line, and click the right arrow at the top left corner of the form.

Co.	Branch	Year	Month	Sales	Costs	Gross Profit	Margin
DEM	EDM	2013	6	1,738,326.40	742,741.32	995,585.08	57.27%
DEM	EDM	2013	7	2,920,364.10	1,144,188.63	1,776,175.47	60.82%
DEM	EDM	2013	8	2,274,060.18	1,026,850.08	1,247,210.10	54.85%

Branch Summary

| TOTALS: | | | | 6,932,750.68 | 2,913,780.03 | 4,018,970.65 | 57.97% |

The next level shows you sales broken down for this branch you've selected, for the month you've selected.

Branch Sales by Invoice (one day) - 2013-07-08

Co.	Branch	Day	Invoice	Sales	Costs	Gross Profit	Margin
DEM	EDM	8	790819	5,543.12	3,983.87	1,559.25	28.13%
DEM	EDM	8	793006	111.12	89.50	21.62	19.46%
DEM	EDM	8	793161	3,159.42	2,354.81	804.61	25.47%
DEM	EDM	8	793257	456.25	259.90	196.35	43.04%
DEM	EDM	8	793282	3,214.08	1,843.69	1,370.39	42.64%
DEM	EDM	8	793313	129.04	77.40	51.64	40.02%
DEM	EDM	8	793396	656.06	419.77	236.29	36.02%
DEM	EDM	8	793451	24.77	17.96	6.81	27.49%
DEM	EDM	8	793453	44.11	28.66	15.45	35.03%
DEM	EDM	8	793454	598.69	449.02	149.67	25.00%
DEM	EDM	8	793455	432.02	259.02	173.00	40.04%
DEM	EDM	8	793457	188.76	110.20	78.56	41.62%
DEM	EDM	8	793458	80.40	46.16	34.24	42.59%
DEM	EDM	8	793459	61.93	36.52	25.41	41.03%
DEM	EDM	8	793460	25.19	19.34	5.85	23.22%
DEM	EDM	8	793461	50.86	38.14	12.72	25.01%
DEM	EDM	8	793462	248.41	169.48	78.93	31.77%
DEM	EDM	8	793463	671.63	454.60	217.03	32.31%
DEM	EDM	8	793464	101.48	58.56	42.92	42.29%
DEM	EDM	8	793465	222.50	138.46	84.04	37.77%
DEM	EDM	8	793466	869.79	578.51	291.29	33.49%
DEM	EDM	8	793468	154.98	89.43	65.55	42.30%
DEM	EDM	8	793469	224.13	128.69	95.44	42.58%
DEM	EDM	8	793470	114.44	66.03	48.41	42.30%

| TOTALS: | | | | 173,662.84 | 71,024.86 | 102,638.12 | 59.10% |

As you drill down, your data becomes more and more specific. So, the next step; would be to show you the sales (by invoice) for a particular day.

Then, if you drill down another level, you will see the details (parts) on the invoice you selected.

Customer Sales

Customer Sales

The sales by customer list starts by displaying a list of all customers with sales within the selected period.

* To get more information, you can right click the line in the list from a "drill down" pop up menu, you can double click a line to drill down, or you can highlight a line, and press the F2 key, or highlight a line, and click the right arrow at the top left corner of the form.

To get further information on a particular customer; right click on the row, and select the appropriate drill down level from the pop up menu, or, double click on the customer to drill down.

There are 4 levels of drill downs.

- The first shows all customers.
- The second level shows the customer's sales; broken down by month.
- The third level shows the customer's sales for the specific month; broken down by date and invoice number.
- The forth level shows the details from the selected invoice.

Product Sales

Product Sales

The sales by product list shows all sales within the period broken down first by product group.

* To get more information, you can right click the line in the list from a "drill down" pop up menu, you can double click a line to drill down, or you can highlight a line, and press the F2 key, or highlight a line, and click the right arrow at the top left corner of the form.

Drilling down will display sales for a specific product group; broken down by product line.

From product line; you drill to the part number level.

From the part number level; you can drill to the part's transaction history.

Top Sellers

Top Sellers

The Top Sellers list shows your 20 best selling parts within the specified period.

You can build your list built on sales (the default), or by quantity sold, by cost, or by gross profit.

To change the list, click on the desired radio button and the list will rebuild based on your select.

Drilling down a level; will show you a list of transactions for the part. Sales, Receiving, and Adjustments are shown.

You can filter on just certain types of transactions or see all of the transactions related to the item.

* Only transactions within the dates listed in the dashboard toolbar will be shown.

Sales by Salesperson

The Sales by Salesperson list; initially shows sales grouped by Salesperson.

* To get more information, you can right click the line in the list from a "drill down" pop up menu, you can double click a line to drill down, or you can highlight a line, and press the F2 key, or highlight a line, and click the right arrow at the top left corner of the form.

Drilling into a specific sales person shows a list of their sales by customer.

Comp.	Branch	Sls	Customer	Inv. No.	Inv. Date	Amount	Costs	Gross Profit	Margin
DEM	AMD	EAR	L&D PETCH CONTRACTING LTD.			53,434.96	34,236.976	19,197.98	35.93%
DEM	AMD	EAR	NORTHWESTERN CONTRACTING LTD.			57,891.82	35,910.604	21,981.22	37.97%

Sales by Salesperson - JAN 1,2011 to DEC 31,2011

The example above shows sales for a single salesperson, grouped by customer. This is the second level of drill down.

The 3rd level of the drill down process shows you the invoices for the specific customer, within the date ranges from the dashboard toolbar.

The 4th level of the drill down process shows you the details (parts) of the invoice you drill into.

Sales by Counterman

Sales by Counterman

Similar in nature to the "Sales by Salesperson" drill down. However, this lists not only the sales, but the line count, and invoice count, for each counterman.

The line count is how many line items (with parts on them); the invoice count is the number of non-voided invoices.

Drilling down one level shows the sales for the selected counterman, by customer.

Drilling down another level shows the sales by product line; for the selected counterman and customer.

The next level down shows sales by part number within the selected product line.

The final level is the sales for your selected part, by invoice number.

Sales by Customer Type

Sales by Customer Type

		Search	× Reset		☑ Hide Transfers (XFER)		Export

Find Customer Type:

Customer Sales by Customer Type: JUN 1,2016 to JUN 30,2016

Branch	Type	Sales	Costs	Gross Profit	Margin	SLS%
003		4,948.45	4,911.29	37.16	0.75%	1.01%
003	1	361.29	454.16	-92.87	-25.71%	0.07%
003	10	89,935.32	59,616.18	30,319.15	33.71%	18.37%
003	11	6,149.37	4,452.07	1,697.30	27.60%	1.26%
003	12	22,199.41	14,847.72	7,351.69	33.12%	4.53%
003	13	13,591.58	8,252.47	5,339.11	39.28%	2.78%
003	15	210,624.18	147,544.68	63,079.50	29.95%	43.02%
003	17	25,179.97	18,547.83	6,632.14	26.34%	5.14%
003	18	15,007.75	11,125.49	3,882.26	25.87%	3.07%
003	19	5,496.29	3,421.98	2,074.31	37.74%	1.12%
003	2	4,293.98	3,268.39	1,025.59	23.88%	0.88%
003	22	1,451.22	1,428.20	23.02	1.59%	0.30%
003	23	688.19	615.39	72.80	10.58%	0.14%
003	5	7.32	4.04	3.28	44.81%	0.00%
003	7	7,839.72	5,993.31	1,846.41	23.55%	1.60%
003	8	12,765.00	8,400.80	4,364.21	34.19%	2.61%
003	CAP	46,682.00	37,870.49	8,811.52	18.88%	9.54%
003	FT	11,957.65	7,915.81	4,041.84	33.80%	2.44%
003	MDA	10,402.50	7,681.83	2,720.67	26.15%	2.12%
TOTALS:		489,581.18	346,352.11	143,229.07	29.26%	

The first level lists sales by the customer type specified in the customer record (from customer maintenance).

Drill into a "type" to see the list of customers under that type.

Drilling into a specific customer shows you their sales by product line.

The next level of the drill down shows you the parts sold to that customer, for the selected product line.

The last level of the drill down shows you the invoices that specific part was sold on, to that customer.

Customer -> Products

The "Customers -> Products" list; initially shows customer sales, just like the "Sales by Customer" list.

Branch	Customer	Cus No.	Sales	Costs	Gross Profit	Margin	SLS%
AMD	ALBERCO CONSTRUCTION LTD.	20	520.000	375.760	144.240	27.738%	0.13%
AMD	ATLAS EQUIPMENT & SUPPLY	15	23.910	12.190	11.720	49.017%	0.01%
AMD	BIRD CONSTRUCTION RENTALS	451	3,551.490	2,463.520	1,087.970	30.634%	0.92%
AMD	CASH CUSTOMER	999011	5.000	5.000	0.000	0.000%	0.00%
AMD	CASMAN CONSTRUCTION LTD	715	-97.050	-26.520	-70.530	-72.674%	-0.03%
AMD	CRANE CARRIER COMPANY	23	54,542.675	35,325.697	19,216.978	35.233%	14.06%
AMD	CRISWEL TRANSMISSION	45	51,622.567	32,799.530	18,823.037	36.463%	13.31%
AMD	DAVE ROSS TRUCKING	221850	52,600.085	33,592.081	19,008.004	36.137%	13.56%
AMD	G.D. JOHNSON CONSTRUCTION PRODUCTS LTD	3603	740.000	534.270	205.730	27.801%	0.19%
AMD	L&D PETCH CONTRACTING LTD.	199000	53,434.955	34,236.976	19,197.979	35.928%	13.77%
AMD	MS. NICOLE L. CARRIERE	850001	37.300	20.733	16.567	44.416%	0.01%
AMD	NORTHWESTERN CONTRACTING LTD.	255750	57,891.820	35,910.604	21,981.216	37.969%	14.92%
AMD	PARTS TO GO	24	6.610	3.579	3.031	45.855%	0.00%
AMD	PCL - MAXAM A JOINT VENTURE	6042	-375.300	-321.870	-53.430	-14.237%	-0.10%
AMD	RAFT RIVER ENTERPRISES LTD	213000	57,367.425	36,820.403	20,547.022	35.817%	14.79%
AMD	RENTCO EQUIPMENT LTD.	6519	910.000	657.580	252.420	27.738%	0.23%
AMD	ROBERT ARREL	11065	55,682.345	35,942.452	19,739.893	35.451%	14.35%
AMD	WEST EDMONTON MALL PH.3	8518	-520.000	-375.760	-144.240	-27.738%	-0.13%
TOTALS:			387,943.86	247,976.22	139,967.61	36.08%	

Find Customer: [ ] Search | Reset

Customer Summary - JAN 1,2011 to DEC 31,2011

Export

When you drill down into the Customers -> Products list, instead of sales being listed by months, and days, they are listed by product group / product line.

Branch	Group	Line	Sub	Line Description	Sales	Costs	Gross Profit	Margin	SLS%
GRA	01	GENE		GENERAL ELECTRIC	32.58	26.06	6.52	20.01%	1.90%
GRA	01	LITT	1	LITTLE FUSE	24.20	12.10	12.10	50.00%	1.41%
GRA	01	TRIC	1	TRICO PRODUCTS	48.88	40.72	8.16	16.70%	2.85%
GRA	04	CRC		CRC	9.96	7.96	2.00	20.08%	0.58%
GRA	04	JOES		JOES HAND CLEANER	16.35	13.08	3.27	20.00%	0.95%
GRA	04	RECO		RECOCHEM CHEMICALS	202.94	162.12	40.82	20.11%	11.83%
GRA	07	TUFF		TUFF GRADE	92.64	69.44	23.20	25.04%	5.40%
GRA	10	COLU	1	COLUMBIA FIRE &	47.52	28.51	19.01	40.00%	2.77%
GRA	10	LOG		LOG BOOK	10.89	8.71	2.18	20.00%	0.64%
GRA	10	NORT		NORTH SAFETY	76.70	61.40	15.30	19.95%	4.47%
GRA	11	CLEA		CLEAN FUNNEL	14.16	8.50	5.66	39.97%	0.83%
GRA	11	DYNA		DYNALINE PRODUCTS	2.40	1.56	0.84	35.00%	0.14%
GRA	12	KIMB		KIMBERLY CLARK	18.06	12.64	5.42	30.00%	1.05%
GRA	26	SCEP		SCEPTER	135.84	113.18	22.66	16.68%	7.92%
GRA	33	CHVA		HDMO	87.90	67.68	20.22	23.00%	5.13%
GRA	33	CHVC		COOLANT	103.32	82.68	20.64	19.98%	6.03%
GRA	33	CHVR		CHEVRON OIL	422.91	331.95	90.96	21.51%	24.66%
GRA	33	CHVR	1	CHEVRON ANTIFREEZE	258.99	207.18	51.81	20.00%	15.10%
GRA	33	LUCA		LUCAS OIL	51.56	41.24	10.32	20.02%	3.01%
GRA	33	TEXA		TEXACO	44.52	35.64	8.88	19.95%	2.60%
GRA	95	ENVI		ENVIRO CHARGES	12.45	12.45	0.00	0.00%	0.73%
TOTALS:					1,714.76	1,344.80	369.96	21.58%	

To drill down further, double click on the product line you'd like to see, or highlight it and press F2, or, right click on the line you'd like to drill into, and a drill down menu will appear.

The next level down is by part number, and then if you drill down further, to the invoice information.

Products -> Customer

Products -> Customer

The Products -> Customer drill downs start by showing your sales by Product Line.

To drill into a specific product line; highlight it, and press F2 (or press the right arrow button at the top left), or right click the row and use the drill down menu to drill down to the next level.

Com	Brn	Grp	Product Line	Line Description	Sales	Costs	Gross Profit	Margin	SLS%
DEM	AMD	1	AERO	AEROQUIP	179.80	116.80	63.00	35.04%	0.05%
DEM	AMD	A1	DIXS	DIXIE STARTERS	6,357.40	3,594.59	2,762.82	43.46%	1.64%
DEM	AMD	A1	FRA	FRAM	1.20	0.00	1.20	100.00%	0.00%
DEM	AMD	A1	HAST	HASTINGS TOOLS	28.91	17.19	11.72	40.54%	0.01%
DEM	AMD	A1	KIT	KITS	1,074.03	746.29	327.74	30.51%	0.28%
DEM	AMD	A1	NGKP	NGK PLUGS	438.00	195.84	242.16	55.29%	0.11%
DEM	AMD	A1	PUR	PUROLATOR FILTERS	-52.33	-43.72	-8.60	-16.44%	-0.01%
DEM	AMD	A2	ACDP	AC DELCO PLUGS	32.80	17.92	14.88	45.37%	0.01%
DEM	AMD	A3	BOSF	BOSCH FILTERS	11,144.90	6,828.61	4,316.29	38.73%	2.87%
DEM	AMD	A3	BOSH	BOSCH OEM LIGHTING	6,278.73	2,879.88	3,398.85	54.13%	1.62%
DEM	AMD	A3	BOSP	BOSCH SPARK PLUGS	22,713.46	12,044.59	10,668.87	46.97%	5.85%
DEM	AMD	A3	BOSW	BOSCH WIPER BLADES	27,757.21	14,864.38	12,892.83	46.45%	7.15%
DEM	AMD	A4	BOSA	BOSCH ALTERNATORS	77,084.31	52,921.03	24,163.28	31.35%	19.87%
DEM	AMD	A4	BOSE	BOSCH ELECTRICAL	60,112.34	35,024.42	25,087.92	41.74%	15.50%
DEM	AMD	A4	BOSS	BOSCH STARTERS	157,838.36	107,167.38	50,670.98	32.10%	40.69%
DEM	AMD	MI	LAB	LABOR	4.50	2.81	1.69	37.49%	0.00%
DEM	AMD	SS	KIMP	PAPER PRODUCTS	1,144.50	641.76	502.74	43.93%	0.30%
DEM	AMD	XX	DIXL	DIXIE ALTERNATORS	4,550.10	3,179.73	1,370.37	30.12%	1.17%
DEM	AMD	ZZ	09	09 NCA EST	454.20	328.25	125.95	27.73%	0.12%
DEM	AMD	ZZ	40	40 NCA TEST	-500.40	-333.60	-166.80	-33.33%	-0.13%
DEM	AMD	ZZ	43	43 NCA TEST	-1.26	-1.08	-0.18	-14.29%	0.00%
TOTALS:					387,943.83	247,976.23	139,967.61	36.08%	

Once you drill into a product line, you'll see sales within that product line broken down by customer.
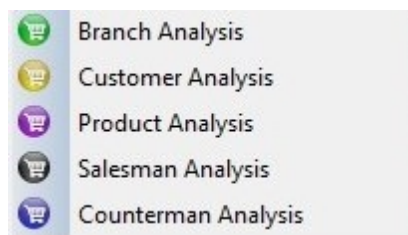
Com	Brn	Line Description	Customer	Cus. No	Sales	Costs	Gross Profit	Margin	SLS%
DEM	AMD	BOSCH FILTERS	CRANE CARRIER COMPANY	23	1,558.48	971.91	586.57	37.64%	13.98%
DEM	AMD	BOSCH FILTERS	CRISWEL TRANSMISSION	45	1,554.01	957.78	596.23	38.37%	13.94%
DEM	AMD	BOSCH FILTERS	DAVE ROSS TRUCKING	221850	1,401.15	868.82	532.34	37.99%	12.57%
DEM	AMD	BOSCH FILTERS	L&D PETCH CONTRACTING LTD.	199000	1,558.77	954.76	604.01	38.75%	13.99%
DEM	AMD	BOSCH FILTERS	NORTHWESTERN CONTRACTING LTD.	255750	1,591.08	930.95	660.13	41.49%	14.28%
DEM	AMD	BOSCH FILTERS	RAFT RIVER ENTERPRISES LTD	213000	1,670.97	1,027.35	643.62	38.52%	14.99%
DEM	AMD	BOSCH FILTERS	ROBERT ARREL	11065	1,810.44	1,117.05	693.39	38.30%	16.24%

Sales for Product Group/Line: A3: BOSF - FROM: JAN 1,2011 to DEC 31,2011

Drilling into the customer will show you the parts they purchased within the product line you selected at level 1.

Sales Analysis

The "Analysis" button displays the following types of Analysis

- Branch Analysis
- Customer Analysis
- Product Analysis
- Salesman Analysis
- Counterman Analysis

All of the analysis drill downs behave the same way; but their starting point is different.

Branch Analysis

Customer Analysis

Product Analysis

Salesman Analysis

Counterman Analysis

Branch Analysis

Branch Analysis

This screen allows you to compare branch sales, period 1 vs. period 2. Initially, period 2 is from the top toolbar (Start Date and End Date), and period 1 is simply period 2 dates less a year.

In order to build anything in the list; you must make any adjustments to the dates in the periods (if any changes are required), and then click the "Go" button.

This tool is useful for analyzing branches who's sales or profit have gone up or down between the two periods specified.

As you can see, the list displays the branch, the period 1 vs. period 2 sales, the variance between the periods, and then an icon to easily show which branch are up or down.

You can also change the "Analysis Type" between Sales or Profits ("Sales" is the default); and you can look for a decrease (down) or an increase (up) of sales or profits between the two periods, or show "All" results (the default).

Once you run your analysis, you can then drill down into the selected branch. The list is built initially by Branch.

To drill down into a branch, double click on them in the list, or, highlight them, and click the right arrow button above the list, or, press the F2 key.

The "Branch Analysis" drills from Branches to Customers to Product Line and then to Part Number. Each level shows the period 1 vs. period 2 performance, and the variance between the periods.

Customer Analysis

The customer sales analysis screen initially comes up blank, except the period 1 dates will be set to one year previous to the currently selected dates in the dashboard toolbar, and the period 2 dates will be set to the dates from the toolbar.

In order to build anything in the list; you must make any adjustments to the dates in the periods (if any changes are required), and then click the "Go" button.

This tool is useful for analyzing customers who's sales or profit have gone up or down between the two periods specified.

For example; you could put a start date of August 1, 2013 and an end date of August 31, 2013 in the "Previous Period" section, and then a start date of September 1, 2013 and an end date of Sept 30, 2013 in the "Current Period" section, and click the "Go" button.

The date periods are completely up to you to determine how you'd like to analyze your data.

Branch	Cus. No.	Customer	Period 1 Sales	Period 2 Sales	Variance	Trend
AMD	20	ALBERCO CONSTRUCTION LTD.	0.00	13,318.50	13,318.50	
AMD	850003	ANGIE NICKLE	0.00	89.76	89.76	
AMD	15	ATLAS EQUIPMENT & SUPPLY	0.00	61.98	61.98	
AMD	451	BIRD CONSTRUCTION RENTALS	0.00	0.10	0.10	
AMD	999999	Cash Sale	0.00	15.00	15.00	
AMD	23	CRANE CARRIER COMPANY	20,056.21	108.84	-19,947.37	
AMD	45	CRISWEL TRANSMISSION	18,270.34	0.00	-18,270.34	
AMD	221850	DAVE ROSS TRUCKING	20,242.91	29.00	-20,213.91	
AMD	22	EASTSIDE TUNEUP TO GO	0.00	730.00	730.00	
AMD	89020	GWIL IND. CRANE SERVICE DIV.	0.00	73.64	73.64	
AMD	199000	L&D PETCH CONTRACTING LTD.	19,451.70	0.00	-19,451.70	
AMD	850001	MS. NICOLE L. CARRIERE	0.00	160.00	160.00	
AMD	255750	NORTHWESTERN CONTRACTING LTD.	20,533.69	0.00	-20,533.69	
AMD	24	PARTS TO GO	0.00	-33.86	-33.86	
AMD	6042	PCL - MAXAM A JOINT VENTURE	0.00	-10.17	-10.17	
AMD	213000	RAFT RIVER ENTERPRISES LTD	20,133.60	0.00	-20,133.60	
AMD	11065	ROBERT ARREL	17,857.22	0.00	-17,857.22	
AMD	25	Wellside Industries	0.00	266.11	266.11	

As you can see, the list displays the customer, the period 1 vs. period 2 sales, the variance between the periods, and then an icon to easily show which customers are up or down.

You can also change the "Analysis Type" between Sales or Profits ("Sales" is the default); and you can look for a decrease (down) or an increase (up) of sales or profits between the two periods, or show "All" results (the default).

Once you run your analysis, you can then drill down into the selected customer. The list is built initially by Customer.

To drill down into a customer, double click on them in the list, or, highlight them, and click the right arrow button above the list, or, press the F2 key.

The next level in the drill down shows you the sales (or profits) for the customer by product line, and the sales (or profits) of each product line period 1 vs. period 2. You can also then drill down into a specific product line to show the individual part sales.

Product Analysis

The **Product Analysis** screen initially comes up blank, except the period 1 dates will be set to one year previous to the currently selected dates in the dashboard toolbar, and the period 2 dates will be set to the dates from the toolbar.

In order to build anything in the list; you must make any adjustments to the dates in the periods (if any changes are required), and then click the "Go" button.
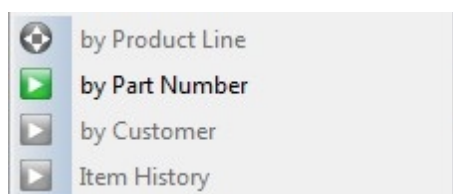
This tool is useful for analyzing Product Line sales or profit that have gone up or down between the two periods specified.

For example; you could put a start date of Jan 1, 2010 and an end date of March 31, 2010 in Period 1 section, and then a start date of Jan 1, 2011 and an end date of March 31, 2011 in period 2 and click the "Go" button.

The date periods are completely up to you to determine how you'd like to analyze your data.

Branch	Product Line	Description	Period 1 Sales	Period 2 Sales	Variance	Trend
AMD			824.22	907.65	83.430	⬆
AMD	AERO	AEROQUIP	247.68	35.96	-211.720	⬇
AMD	BOSA	BOSCH ALTERNATORS	38,432.79	11,119.65	-27,313.140	⬇
AMD	BOSE	BOSCH ELECTRICAL	15,790.65	9,424.21	-6,366.440	⬇
AMD	BOSF	BOSCH FILTERS	4,174.97	1,856.89	-2,318.080	⬇
AMD	BOSH	BOSCH OEM LIGHTING	274.44	978.95	704.510	⬆
AMD	BOSP	BOSCH SPARK PLUGS	8,477.14	3,534.78	-4,942.360	⬇
AMD	BOSS	BOSCH STARTERS	97,595.79	24,650.94	-72,944.850	⬇
AMD	BOSW	BOSCH WIPER BLADES	7,817.63	4,280.72	-3,536.910	⬇
AMD	DIXL	DIXIE ALTERNATORS	14,682.60	821.58	-13,861.025	⬇
AMD	DIXS	DIXIE STARTERS	432.36	1,029.80	597.440	⬆
AMD	KIMP	PAPER PRODUCTS	1,542.96	163.50	-1,379.460	⬇
AMD	KIT	KITS	1,175.04	296.51	-878.530	⬇
AMD	NGKP	NGK PLUGS	125.82	65.70	-60.120	⬇
			191,594.09	59,166.84		

To select additional information, highlight a Product Line and right click to bring up the Drill Down menu.

You can drill down to the part numbers within that product line, and then to customers for the specific part, and then to the part history.

Salesman Analysis

Salesman Analysis

This screen allows you to compare salesman sales, period 1 vs. period 2. Initially, period 2 is from the top toolbar (Start Date and End Date), and period 1 is simply period 2 dates less a year.

In order to build anything in the list; you must make any adjustments to the dates in the periods (if any changes are required), and then click the "Go" button.

This tool is useful for analyzing salesmen and whether or not their sales or profit have gone up or down between the two periods specified.

As you can see, the list displays the Salesman, the period 1 vs. period 2 sales, the variance between the periods, and then an icon to easily show which salesmen are up or down.

You can also change the "Analysis Type" between Sales or Profits ("Sales" is the default); and you can look for a decrease (down) or an increase (up) of sales or profits between the two periods, or show "All" results (the default).

Once you run your analysis, you can then drill down into the selected salesman. The list is built initially by Salesman.

To drill down into a salesman, double click on them in the list, or, highlight them, and click the right arrow button above the list, or, press the F2 key.

The "Salesman Analysis" drills from Salesmen to Customers to Product Line and then to Part Number. Each level shows the period 1 vs. period 2 performance, and the variance between the periods.

Counterman Analysis

Counterman Analysis

This screen allows you to compare counterman sales, period 1 vs. period 2. Initially, period 2 is from the top toolbar (Start Date and End Date), and period 1 is simply period 2 dates less a year.

In order to build anything in the list; you must make any adjustments to the dates in the periods (if any changes are required), and then click the "Go" button.

This tool is useful for analyzing counterman and whether or not their sales or profit have gone up or down between the two periods specified.

Branch	Counterman	Description	Period 1 Sales	Period 2 Sales	Variance	Trend
AMD			37.30	680.59	643.29	⬆
AMD	ACJ		5,363.65	0.00	-5,363.65	⬇
AMD	DEM		-80.49	35.97	116.46	⬆
AMD	LSM		5.00	0.00	-5.00	⬇
AMD	MER		382,618.37	13,362.34	-369,256.03	⬇
AMD	ORD		0.00	730.00	730.00	⬆
	TOTALS:		387,943.83	14,808.90	-373,134.93	

Sales Analysis - by Counterman. Analysis Type: Sales, Profit, Margin. Period 1: Start: 2011-01-01 End: 2011-12-31 Period 2: Start: 2012-01-01 End: 2012-12-31. Filter: All, Down, Up.

Ctrl-P: Set Filter   Ctrl-Shift-P: Clear Filter

As you can see, the list displays the counterman, the period 1 vs. period 2 sales, the variance between the periods, and then an icon to easily show which countermen are up or down.

You can also change the "Analysis Type" between Sales or Profits ("Sales" is the default); and you can look for a decrease (down) or an increase (up) of sales or profits between the two periods, or show "All" results (the default).

Once you run your analysis, you can then drill down into the selected counterman. The list is built initially by Counterman.

To drill down into a Counterman, double click on them in the list, or, highlight them, and click the right arrow button above the list, or, press the F2 key.

The "Counterman Analysis" drills from Counterman to Customers to Product Line and then to Part Number. Each level shows the period 1 vs. period 2 performance, and the variance between the periods.

Inventory

The inventory section allows you to view your inventory list; in four different ways.
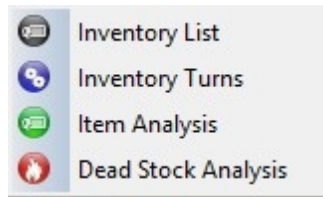
Inventory List - This list shows your inventory and allows you to apply filters to your list, such as items with transactions within the date range specified in the toolbar, or "Overstock" items, or negative on-hands, etc.

Inventory Turns - This list shows your inventory value and how many times per period (from the toolbar) and per year the value will turn over. Drilling down into the list allows you to go from the branch level, to the product group level, then product line, and finally, part number. Once you are at the part number level; drilling again will show you a list of transactions for the item.

Item Analysis - This is a list of parts from your inventory, with any sales information. Sales information does not determine if an item shows up in this list; just the filters do that. This is an excellent place to analyze your inventory. Sales information is based on the dates you have chosen in the Dashboard toolbar.

All of these sections will drill to the part transactions as the final level of drill down.

Dead Stock Analysis - This shows your inventory, and where an inactive item might be selling in another of your branches.

View Inventory

View Inventory

Initially the list is shown for all product groups with parts having a non-zero quantity.

You can filter this list to show items with activity within the date range, no activity within the date range, or all items (the default).

You can show "All" parts, parts with non-zero quantities (the default), over stock (quantity on hand greater than max quantity), under stock (quantity on hand less than min quantity), or Negative On-hand.

You can combine the two filters to create a unique view of your parts. For example; you could select "No activity within Date Range", and quantity "Over Stock" to get a list of items that haven't moved within your selected date period where your quantity is greater than max.

There is also a special check box at the top; called "Show All Inventory".

This flattens the list to part numbers immediately, and allows you to apply your filters to the entire list of parts.

So, from this list, you could show all parts with transactions within the date range, that are under-stocked.

Drilling down from a part number displays the part transaction history.

Inventory Turns

This list shows your inventory value and how many times per period (from the toolbar) and per year the value will turn over.

Branch	Inventory Costs		Sales At Cost	Turns @ Replacement Cost		Turns @ Average Cost	
	Replacement	Average		per year	this period	per year	this period
AMD	1,196,903.33	812,807.94	387,943.87	0.32	0.32	0.48	0.48

Drilling down into the list allows you to go from the branch level, to the product group level, then product line, and finally, part number.

| Branch | Group | Inventory Costs | | Sales At Cost | Turns @ Replacement Cost | | Turns @ Average Cost | |
		Replacement	Average		per year	this period	per year	this period
AMD	01	7,764.17	895.82	0.00	0.00	0.00	0.00	0.00
AMD	1	41,722.14	22,668.81	179.80	0.00	0.00	0.01	0.01
AMD	33	305,278.85	690.76	0.00	0.00	0.00	0.00	0.00
AMD	A1	123,651.87	99,270.04	7,847.22	0.06	0.06	0.08	0.08
AMD	A2	4,565.36	4,494.68	32.80	0.01	0.01	0.01	0.01
AMD	A3	12,650.85	8,267.99	67,894.30	5.37	5.37	8.21	8.21
AMD	A4	83,641.94	72,285.87	295,035.01	3.53	3.53	4.08	4.08
AMD	BU	0.27	0.27	0.00	0.00	0.00	0.00	0.00
AMD	IN	4,260.00	7,720.00	0.00	0.00	0.00	0.00	0.00
AMD	MI	29,456.90	29,215.55	4.50	0.00	0.00	0.00	0.00
AMD	MO	450,000.00	450,000.00	0.00	0.00	0.00	0.00	0.00
AMD	PA	12,071.12	12,071.12	0.00	0.00	0.00	0.00	0.00
AMD	SP	572.00	572.00	0.00	0.00	0.00	0.00	0.00
AMD	SS	580.64	580.64	1,144.50	1.97	1.97	1.97	1.97
AMD	WO	16,142.50	16,142.50	0.00	0.00	0.00	0.00	0.00
AMD	XX	45,214.41	28,600.56	4,550.13	0.10	0.10	0.16	0.16
AMD	ZZ	59,331.32	59,331.32	837.60	0.01	0.01	0.01	0.01

Once you are at the part number level; drilling again will show you a list of transactions for the item.

Item Analysis

Item Analysis

The information in this list is shown direction from your inventory file. It does not show quantities on hand, rather, it shows you the parts and any sales information for the part.

You can filter the list by product group, product line, line abbrev, part number, or part status.

Sales information is shown based on the company, branch, and dates you have selected in top toolbar.

Qty Filters
Qty Filters affect which of your selected items show in the list. The default; is to only show items with at least a qty of 1 shipped. The different QTY filters can be combined to further filter down your list.

Filter Type
The default "Filter Type" is an "AND" type filter. So; if you have Min Qty Shipped: 1, and Min Backorder: 1, then a part must have both conditions in order to show up in the list. Ie; it must have sold as well as been backordered.
Selecting an "OR" type filter, allows you to show parts where one of the selected conditions applies. So, using our example above, with a Qty Shipped: 1, and Backorder: 1, any part that has sold, or been backordered (both is OK), will show up in the list.

Brn Typ	Sta	Prod. Line	Line Abbrv	Part Number / Description	Available	On Order	Ordered	Override	Lost Sales	Buyout	Backord	Spec. BO	BO Filled	Shipped	Total Sales	Total Costs	Gross Profit	Margin
001 R	N	BALO	BAL	B143 OIL FILTER			2							2	8.01	7.99	0.02	0.20%
001 R	N	BALO	BAL	B1432 OIL FILTER	17		5	2						5	19.80	18.52	1.28	6.47%
001 R	N	BALO	BAL	B1438 OIL FILTER	2		31	1			16		16	31	75.17	65.55	9.61	12.79%
001 R	N	BALO	BAL	B1441 OIL FILTER	28		16	15						16	95.65	94.98	0.67	0.70%
001 R	N	BALO	BAL	B1446 OIL FILTER	7		3	3						3	17.74	17.74		
001 R	N	BALO	BAL	B160 OIL FILTER	49		14	1						14	53.67	40.90	12.77	23.79%
001 R	N	BALO	BAL	B161S OIL FILTER	89		83	18						83	385.40	349.26	36.14	9.38%
001 R	N	BALO	BAL	B163 OIL FILTER	10		11	10						11	48.18	44.87	3.32	6.88%
001	N	BALO	BAL	B166			6							6	23.10	20.90	2.20	9.53%
TOTALS: Item Count				1164			12,764	5,684	0	0	984	156	1,030	12,654	208,569.45	190,811.20	17,758.25	8.51%

The list shows the branch, item type, product information, as well as the current stocking quantities, as well as the sales quantities for Ordered, Override, Lost Sales, Buyout, Back Order, Special Back Order, Back Orders Filled, and the Qty shipped. As well, the dollar amounts for sales, costs, gross profit, and margin are shown.

The second drill down level shows the invoices the part was sold on. Drilling further into a part; shows you the item's transaction history.

* While you can analyze your entire parts list, be aware, as in the case above, you might be dealing with 100s of thousands of rows of information. This can take quite a long time, depending on how many parts are in your inventory.

Dead Stock Analysis

Dead Stock Analysis

The "Dead Stock Analysis" screen allows you to view inventory which is inactive in a given branch that is active in another location.

This window does not use the dates from the Dashboard Toolbar.

Dates are defaulted as follows:

Dead Stock Date - One year from the current date
Active Sales Date - 6 months ago (from the 1st of that month)

Parts that have not sold in a year, but have activity more recent than 6 months ago, are shown.

Product Line	Abr	Part Number	Description	Repl. Cost	Avg. Cost	Obsolete			Current Sales		
						BRN	Last Sale	Qty On Hand	BRN	Last Sale	Qty Sold
A80	A80	010		0.048	0.053	CGY	2013-06-18	42	EDM	2014-10-03	891
A80	A80	011		0.046	0.042	CGY	2013-05-02	16	EDM	2014-10-03	992
A80	A80	012		0.049	0.066	CGY	2011-01-25	38	EDM	2014-10-03	440
A80	A80	027		0.416	0.497	CGY	2009-06-02	1	EDM	2014-05-15	2
A80	A80	032		0.674	0.674	CGY	2013-02-26	20	EDM	2014-07-31	8
A80	A80	032		0.674	0.674	CGY	2013-02-26	20	SCA	2014-08-05	8
A80	A80	110		0.075	0.110	CGY	2010-06-22	35	EDM	2014-10-03	551
A80	A80	111		0.090	0.074	CGY	2011-05-26	10	EDM	2014-09-19	420
A80	A80	114		0.126	0.122	CGY	2013-06-18	25	EDM	2014-09-19	225
A80	A80	115		0.145	0.152	CGY	2013-10-08	70	EDM	2014-10-16	1,120
A80	A80	125		0.270	0.649	CGY	2013-09-05	5	EDM	2014-05-16	50
A80	A80	131		0.358	0.001	CGY	2008-05-01	2	EDM	2014-07-29	1
A80	A80	135		1.039	0.914	CGY	2012-04-30	1	EDM	2014-10-08	96
A80	A80	138		0.479	1.070	CGY	2006-04-21	2	EDM	2014-08-08	25
A80	A80	210		0.242	0.237	CGY	2013-09-30	73	EDM	2014-10-03	550
A80	A80	213		0.310	0.287	CGY	2008-10-02	181	EDM	2014-09-19	201
A80	A80	214		0.341	0.338	CGY	2013-08-09	9	EDM	2014-09-19	945
A80	A80	216		0.387	0.365	CGY	2012-12-12	3	EDM	2014-10-03	416
A80	A80	217		0.880	0.972	CGY	2012-10-26	20	EDM	2014-09-18	20

If you right click on a part, you can view it's history in the Obsolete branch.

▶ Item Sales History

Inventory Transactions

Most of the inventory screens will drill down to the "Inventory Transactions" level as their final level.

This will show you a list of transactions for the part. Sales, Receiving, Adjustments, and Transfers are shown.

Inventory Transactions GROT 43850

Item History Filter: ○ All ○ Sales ○ Receiving ○ Adjustments ○ Transfer   ☐ Kit Item Sales (instead of header)   Export

Com	Brn	Line	Sub Line	Part Number	Description	Qty	Date	Customer/Vendor	Trans. Type
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	4	2014-06-20	ROSEN	Sale
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	2	2014-06-02	DEM2 COMPANY	Transfer
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	10	2014-05-12	GROI	Receiving
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	5	2014-05-06	GROI	Receiving
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	1	2014-04-30	adjustment	Adjustment
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	13	2014-04-30	ADVERTISING	Sale
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	0	2014-04-30	adjustment	Adjustment
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	5	2014-04-22	GROI	Receiving
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	10	2014-04-07	GROI	Receiving
DEM	GRA	GROT		43850	MOUNTING BRACKET HOT WIRE	4	2014-04-07	SEM	Sale

The default is to show all of the transactions, but you can click to filter to a specific type of transaction. To do so, simply click the radio button for the type of transaction you'd like to see, such as "Sales" or "Adjustments".

The check box for "Kit Item Sales (instead of header) allows you to see if an item was sold as part of a kit. Normally only the header shows sales information.

___

Also available is a "Demand" tab; which shows sales for the item for the past 3 years, broken down into monthly figures.

Branch						Month						
	7-2014	6-2014	5-2014	4-2014	3-2014	2-2014	1-2014	12-2013	11-2013	10-2013	9-2013	8-2013
	7-2013	6-2013	5-2013	4-2013	3-2013	2-2013	1-2013	12-2012	11-2012	10-2012	9-2012	8-2012
	7-2012	6-2012	5-2012	4-2012	3-2012	2-2012	1-2012	12-2011	11-2011	10-2011	9-2011	8-2011
GRA	5.00	4.00	8.00	8.00	0.00	7.00	6.00	6.00	1.00	10.00	6.00	8.00
	2.00	19.00	1.00	2.00	3.00	8.00	17.00	15.00	6.00	16.00	6.00	10.00
	3.00	0.00	15.00	11.00	56.00	44.00	2.00	6.00	24.00	16.00	26.00	0.00

* Currently does not include old part numbers (renames)

Demand is listed as the total quantity shipped within each month, for the past 36 months.

Purchasing

Purchasing

The Purchasing button allows you access to 3 different purchasing drill downs

Purchases by Supplier - This list shows your receiving by Supplier within the dates specified in the top toolbar of the dashboard. Drill downs go from Supplier, to Product Line, then to Part Number, then to P.O.

Purchases by Product - This list shows your receiving, starting at the Product Line level, within the dates specified in the top toolbar of the dashboard. Drill downs go to Part Number, then to Purchases by supplier for the selected part number, then to POs.

Purchasing Analysis - Here you can analyze your purchasing by supplier, comparing period 1 vs. period 2. So, for example, you could compare your purchases from last year to this year to see which suppliers you are up or down on.

Purchases by Supplier

Purchases by Supplier

This list shows your purchasing (good received) starting at the "Supplier" level.

Right click, or click the right arrow button, to drill into the highlighted selection.

The next level will show you the purchasing by product line for the previously highlighted supplier.

To go to the part number level, highlight your desired product line; and right click and select "Purchases - for selected product line". This will bring you to the part number level.

If you right click on a part, and select "Purchases - for selected part" you will see a list of PO numbers this part was received on.

Purchases by Product

Purchases by Product

This list shows your purchasing (good received) starting at the "Product Line" level.

Com	BRN	Grp	Product Line	Description	Total Cost	Portion
DEM	AMD	A1	BOS	BOSCH	10.00	1.22%
DEM	AMD	A1	DOC	DOCAP MASTER	9.50	1.16%
DEM	AMD	A1	FENC	FENCO CALIPERS	208.25	25.33%
DEM	AMD	A1	HASF	HASTINGS FILTERS	594.25	72.29%

Right click, or click the right arrow button, to drill into the highlighted selection.
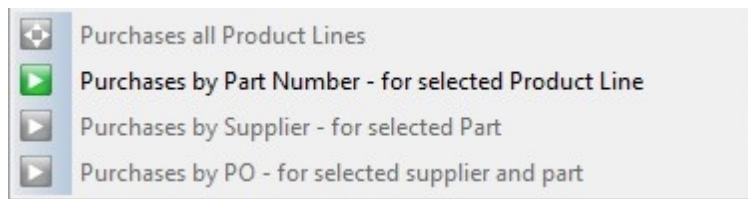
The next level will show you the purchasing by Part Number for the previously highlighted Product Line.

Next, you can select a part, to see which suppliers you purchased the part from, and finally, which PO's for the selected supplier you received the goods on.

Purchasing Analysis

Purchasing Analysis

The Purchasing Analysis screen allows you to compare your purchasing from two different periods, by Supplier.

The dates for period 1 and period 2 are defaulted based on the values you have in the dashboard toolbar when this window is opened (it doesn't change if you subsequently change the dates in the toolbar).

Period 2 is set to the dates you have selected in the toolbar, while period 1 is set to 1 year previous. However; you can modify the dates to be something completely different from the toolbar.

You can do your analysis by Purchases (value of received goods), or by Qty Received. This just affects the trend and variance columns, and how they are calculated. Once you key in your period 1 and period 2 dates, click the "GO" button to run the analysis.

Once you have your initial list, you can right click on a supplier, and then drill down to their product line performance (period 1 vs. period 2).
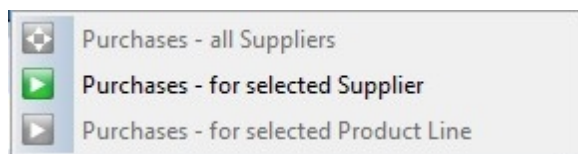
From there, you can highlight a product line, and get a list of parts and their performance for the periods.

Accounting

The Accounting button allows you to access the accounting functions within E360.

Currently there are eight accounting sections.

Accounts Receivable
Who owes you money and when is it due

Accounts Payable
Who do you owe money to and when is it due

G/L Account Balances
Shows you the balance sheet for the current period, plus last year's same period

Monthly Income Statement
This shows monthly income for the periods selected in the top toolbar. Each month is listed separate; you can specify up to 84 months to display

Yearly Income (Tree)
The past 5 years of incoming; plus the current year, and it's projected total for the end of the year.

Monthly Income (Tree)
The current YTD (up to the last closed period) and the previous 5 years - listed by month.

Custom Income (Tree)
The current YTD (up to the last closed period) and the previous 5 years - listed by month, minus any accounts you've chosen to exclude

Year / Month Income (Tree)
A fiscal year; from period 12 to period 1, within each is the current and previous years - each on it's own row.

Accounts Receivable

The Accounts Receivable shows you a search-able and drill-able Aging list.

You can search for a particular customer in the search box; and you can also select a customer and drill down to their invoices. Once you get to the invoice list; you can drill down again for the details of the invoice.

You can also filter the list; to show "All" customers; Customers a balance of "Over 30", "Over 60", "Over 90"

or "Over 120" days. As well, you can also filter the list to show customers who are over their credit limit.

The Accounts Receivable starts off with a list of customers and their balances; broken down by period.

You can search for a particular customer in the search box; and you can also select a customer and drill down to their invoices. Once you get to the invoice list; you can drill down again for the details of the invoice.

You can also filter the list; to show "All" customers; Customers a balance of "Over 30", "Over 60", "Over 90" or "Over 120" days. As well, you can also filter the list to show customers who are over their credit limit.

The sort order can be changed by clicking on a column title, this changes the sort order for the column. If you click the title again you can switch the sort order from ascending to descending.

To remove the sort order press shift and click the column header to reset the sort order to it's default setting. The Accounts Receivable (A/R) list is unaffected by the dates shown in the Dashboard toolbar.

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Accounts Payable

The Accounts Payable shows you a search-able and drill-able Aging list for your vendors.

You can search the list by pressing CTRL-F. This will allow you to search and filter your list.

The Accounts Payable list is unaffected by the dates shown in the Dashboard toolbar.

The aging date is set in AutoPoint Evolution and can not be changed in E360.

The list is by default sorted alphabetically on the Vendor name; and amounts are organized into categories for each vendor.

Future

- 61 plus - These invoices are not due for payment until more than 60 days in the future.
- 60-30 - These invoices are due for payment from 30 to 60 days from now.

Current Due - These invoices are due from today until 30 days from now.

OverDue

- 1 to 30 - These invoices are overdue for payment, by 30 days or less.
- 30 to 60 - These invoices are overdue for payment by 30 to 60 days.
- 61 plus - These invoices are more than 60 days overdue

G/L Account Balances

G/L Account Balances

This screen allows you to view your account balances. You can select your balance date using the **"Balance Date"** drop down. The current year (based on the date you select) plus the previous year for the same period are shown.

Balance Date: 2015-02-28						
Balance Sheet					Balance Sheet as of: 2015-02-28	

Account Info	Description	Current Year		Previous Year	
		Debit	Credit	Debit	Credit
+ CAPITAL		0.00	1,419,799.59	0.00	1,392,579.81
+ CURRENT ASSET		12,230,620.49	0.00	11,890,063.42	0.00
+ CURRENT LIABILITY		0.00	3,307,198.04	0.00	2,974,523.29
+ FIXED ASSET		842,391.32	0.00	1,000,633.85	0.00
+ LONG TERM LIABILITY		0.00	6,828,761.94	0.00	7,058,761.94

To see additional information; click the + sign beside the heading; that will open up additional information below the item you selected.

Monthly Income Statement

Monthly Income Statement

The monthly income statement lists each month's income, based on the dates you've selected in the top toolbar.

Company: DEM	Branch: GRA	Date Range: PREVIOUS 3 MONTHS	Start: 2015-01-01 ...	End: 2015-03-31 ...	GO

Monthly Income Statement - From: 2015-01-01 to 2015-03-31   Export

Line Type	2015-01	2015-02	2015-03
REVENUE	4,471,450.96	3,037,647.44	2,884,832.99
COST OF GOODS	3,645,888.53	2,383,529.38	2,325,733.84
GROSS PROFIT	825,562.43	654,118.06	559,099.15
EXPENSE	921,577.14	625,485.26	679,359.73
PROFIT	-96,014.71	28,632.80	-120,260.58
OTHER REVENUE	113,324.32	145,755.33	46,093.03
OTHER EXPENSE	10,570.28	-17,568.37	-363.00
NET PROFIT	6,739.33	191,956.50	-73,804.55

Numbers listed in RED represent a negative amount.

The list can hold up to 84 months of data. To drill down; double click or right click row to see the accounts that are within it. Once you are at the Account Number level; you can drill to a specific month by right clicking or double clicking the cell you would like to drill into it's details. This is different that elsewhere in E360; where drill downs are done on the entire row.

Monthly Income Statement - From: 2015-01-01 to 2015-03-31 Type: COST OF GOODS

Account Number	Description	2015-01	2015-02	2015-03
5001-100	Cost of Sales - Auto Parts	83,244.04	59,132.77	61,193.33
5001-150	Cost of Sales - Auto Parts	16,762.43	10,753.77	6,376.47
5002-100	Cost of Sales - Chain & Riggin		24,422.43	15,251.53
5002-150	Cost of Sales - Chain & Riggin		8,404.16	3,895.90
5003-100	Cost of Sales - Sporting Goods	939.51	1,174.57	355.62

by Account Type
by Account No.
Transaction Detail

Once you select a cell and drill into it; you will see the transactions for that account.

Line Type	Account Number	Description	Date	Trans No.	2015-01
COST OF GOODS	5001-150	A/R DISTRIBUTION POST	2015-01-10	1397	319.22
COST OF GOODS	5001-150	A/R DISTRIBUTION POST	2015-01-26	1501	838.45
COST OF GOODS	5001-150	A/R DISTRIBUTION POST	2015-01-21	1472	945.38

Yearly Income (Tree)

Yearly Income (Tree)

The Yearly income tree displays the previous 5 years, plus the YTD for the current year.

Account	2015 YTD	2015 Projected	2014	2013	2012	2011	2010
+ REVENUE	12,339,821.62	44,451,806.97	38,121,943.18	34,187,358.02	31,114,444.77	31,114,444.77	16,685,129.24
+ COST OF GOODS	9,991,983.09	33,552,663.18	28,831,295.45	26,076,128.02	23,488,096.44	23,488,096.44	12,297,153.76
GROSS PROFIT	2,347,838.53	10,899,143.79	9,290,647.73	8,111,230.00	7,626,348.33	7,626,348.33	4,387,975.48
+ EXPENSE	2,543,377.89	8,252,361.75	7,491,057.83	6,800,478.71	5,883,531.89	5,883,531.89	3,972,511.84
PROFIT	-195,539.36	2,646,782.04	1,799,589.90	1,310,751.29	1,742,816.44	1,742,816.44	415,463.64
+ OTHER REVENUE	506,281.54	1,126,071.03	1,083,664.10	858,742.42	981,632.82	981,632.82	619,974.57
+ OTHER EXPENSE	10,440.81	-29,882.12	-22,483.47	3,987.19	-34,818.18	-34,818.18	16.53
NET PROFIT	300,301.37	3,802,735.19	2,905,737.47	2,165,506.52	2,759,267.44	2,759,267.44	1,035,421.68

Yearly Income - From: 2009-05-01 to 2015-02-28   Current YTD (up to last closed period) and the 5 previous years

To see the details for a section, click the + beside the heading.

Account	2015 YTD	2015 Projected	2014	2013	2012	2011	2010
− EXPENSE	2,543,377.89	8,252,361.75	7,491,057.83	6,800,478.71	5,883,531.89	5,883,531.89	3,972,511.84
6000-100 - Accounting & Legal	3,400.00	11,031.80	10,660.10	9,191.95	14,085.02	7,613.23	7,468.12
6010-100 - Advertising - Miscella	0.00	0.00	0.00	0.00	0.00	25,454.45	23,448.44

As you can see; the totals for each month are listed by account, year by year for easy comparison.

Monthly Income (Tree)

The Monthly Income (Tree) shows the current yearly numbers, from the last period in descending order, for the current year and the previous 5 years.

Similar to the "Yearly Income (Tree)", this lists each month in a separate column; where the other lists income by year.

Yearly Income - From: 2009-05-01 to 2015-02-28   Current YTD (up to last closed period) and the 5 previous years

Account	FEB-2015	JAN-2015	DEC-2014	NOV-2014	OCT-2014	SEP-2014	AUG-2014
+ REVENUE	607,168.34	846,199.86	800,433.35	947,650.01	1,090,253.54	452,763.13	1,147,228.2
+ COST OF GOODS	222,860.21	150,909.30	190,774.12	620,832.26	802,042.09	212,517.35	191,918.0
GROSS PROFIT	384,308.13	695,290.56	609,659.23	326,817.75	288,211.45	240,245.78	955,310.2
+ EXPENSE	271,277.41	350,675.15	253,206.79	255,306.64	222,951.28	235,853.81	311,750.4
PROFIT	113,030.72	344,615.41	356,452.44	71,511.11	65,260.17	4,391.97	643,559.7
+ OTHER REVENUE	10,866.50	10,123.65	9,945.91	9,035.92	7,365.38	9,978.72	9,933.4
NET PROFIT	123,897.22	354,739.06	366,398.35	80,547.03	72,625.55	14,370.69	653,493.2

To show the details for a section; click the + beside the heading.

Account	FEB-2015	JAN-2015	DEC-2014	NOV-2014	OCT-2014	SEP-2014	AUG-2014
⊟ REVENUE	607,168.34	846,199.86	800,433.35	947,650.01	1,090,253.54	452,763.13	1,147,228.2
6610-01-01 - labour --parts	15.00	39.40	63.80	-250.40	318.60	2.00	48.10
6610-02-01 - labour--service	108,248.16	114,057.08	93,184.56	83,242.08	69,643.44	75,457.41	67,479.1

Custom Income (Tree)

Custom Income (Tree)

Account	MAR-2016	FEB-2016	JAN-2016	DEC-2015	NOV-2015	OCT-2015	SEP-2015	AUG-2015
⊞ REVENUE	1,697,595.58	1,994,057.09	1,842,743.15	2,192,367.08	2,026,578.34	1,923,130.31	2,656,873.71	1,982,116.70
⊞ COST OF GOODS	951,592.21	1,124,849.58	900,495.28	1,098,328.39	983,862.17	945,718.27	1,189,494.60	935,990.65
GROSS PROFIT	746,003.37	869,207.51	942,247.87	1,094,038.69	1,042,716.17	977,412.04	1,467,379.11	1,046,126.05
⊞ EXPENSE	863,252.59	872,603.16	842,316.45	1,136,484.19	866,158.99	632,723.33	1,391,660.01	741,020.31
PROFIT	-117,249.22	-3,395.65	99,931.42	-42,445.50	176,557.18	344,688.71	75,719.10	305,105.74
⊞ OTHER EXPENSE	-33,082.80	-11,085.69	-9,937.26	-10,820.09	-9,202.75	-9,528.10	-9,232.99	-9,385.81
NET PROFIT	-84,166.42	7,690.04	109,868.68	-31,625.41	185,759.93	354,216.81	84,952.09	314,491.55

Filter: [ ] Search × Reset   Export

Yearly Income - From: 2010-10-01 to 2016-03-31   Current YTD and the 5 previous years

Ranges being Excluded

Exclusion Description	Acct Number Start	Acct Number End
Special Refunds	0952-000	0952-600

As you can see; once you set up your exclusions, you'll see your normal income statement, for the past 5 years, minus your exclusions.

To expand a section, click on the + sign beside it.

Year / Month Income (Tree)

The Year / Month Income (Tree) provides the fiscal year from period 1 to 12, and each account is listed with each year below the next.

This allows you to easily compare income by month by month for a given year and account.

To open the details, click on the + beside the heading.

Custom Queries

The Custom Queries section is designed to allow you to create your own queries; and then export the results.

There is a lot of flexibility built into the system, but it can be somewhat complex.

Creating a Query

Query Tables

    view_crm_goals_and_sales
    view_crm_opportunities
    view_customer_backorders
    view_customers
    view_gl_distributions
    view_invoicedetail
    view_invoiceheader
    view_items

view_leadtime
view_open_invoice_detail
view_open_invoice_header
view_purchasing
view_receiving
view_sales
view_sales_with_inventory_info
view_transactions
view_vendors

Quick Steps to Build a Query

1) Select a "Report Table" or a view from the top left

2) Select the Field names you want to be able to see in the report.

3) Sort the fields so they are listed in the same order you want to see on the report (order top-to-bottom is the order the results will display left-to-right).

4) Add filters (see "How to Narrow Results" section for more information on how to add filters).

5) You are ready to run the query now!

6) When the report has run, the results will display just below the Field Names and Columns on Report.

For detailed information on how to build a report, go the "Creating a Query" section

Creating a Query

To create a query, you must select a "Report Table" from the drop down box in the top-left .

These tables are special tables called "Views", these views combine different pieces of the database together based on related information.
You can only use one table/view to build each report, you cannot take fields from different views.

Once you pick your table; a list of Field Names, which are potential columns in the report, will appear just below the Report Table.

To copy a field into your query you have three options:
1. Double click the field name
2. Drag the field over to the right and drop it into the "Columns on Report" list
3. Right click an available field, and select "Add".

A check mark will appear beside it's name indicating that the field is "tagged"and will appear in the list of fields to the right.
   Fields can be added to a report more than once and is sometimes necessary to define multiple conditions.

Col	Sort	Field Name	Column Name	Filter Type	Math	Value	Fct	Cond.	Filter Only	Ask	Calc
1		company	Company	EQUALS		Company			✓	✓	
2	▲	branch	Branch								
3	▲	invoice_date	invoice_date	BETWEEN		invoice_date				✓	
4	▲	customer_name	Customer Name								
5	▲	customer_number	Customer Number								
6	▲	invoice_number	invoice_number								
7	▲	qty_shipped	Returns			WHEN qty_shipped < 0 TH	SUM	✓			
8	▲	qty_shipped	Sales			WHEN qty_shipped > 0 TH	SUM	✓			
9	▲	invoice_salesman									

** You can also choose to add all fields to be in the report (this is not recommended for the larger views as it could take a long time to return results for all the fields, especially if they are not filtered)

In the "Columns on the Report" list; you'll see a column with the title of "Col", and one titled "Sort Priority". By default; columns are sorted in the order they appear in this list, from top to bottom. However, you can override this order with the "Sort Priority".

To override a sort order, right click on the field, and select "Sort Priority +" - this makes the column more important in the sort order. You can define multiple sort priorities. They will be numbered 1, 2, 3, etc. This is most useful when wanting to build a report where the columns appear in a particular order, but you want to sort using a different order.

In the example above, the "Sales" column is the one used for sorting (in this case, in descending order).

The order you select the fields for your report will affect the order they display in the "Columns on the Report" section. However, you can change the order by clicking and dragging the names, or by using the green up and down arrows while the line is highlighted.

In the example above:
- The "company" column would be first, and company would be restricted to only display the DEM company information. Notice here that the "Filter Only" flag is set. That means the results will be limited by company, but the column won't appear in the results.

- The invoice_date is next, but it is also set to be a "Filter Only" field; so the dates will be used to limit the results, but the dates won't appear in the list of results.
- The next column, which is "customer name" will be the first column to actually appear in our results, and normally, this would be the first sort priority. However, we have overridden that for "extended_price".
- The second column we'll actually be displaying is what we're calling the "Sales" column (which is actually called "extended_price"). We've also modified the sort to be in descending order.
  - This is a flag in the filter screen.

To access the filter screen, or make other changes, right click the option you wish to modify to see the menu.
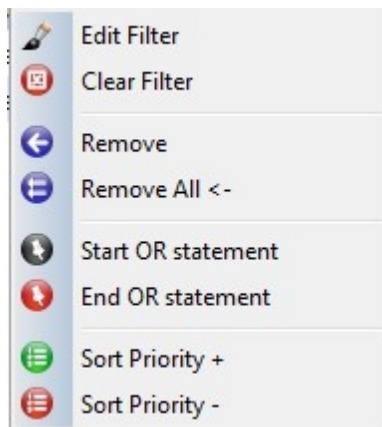
The filter screen

You can override the name of the column (it will default to the actual field name)

Operator - this drop box allows you to set the filter type. EQUALS, BETWEEN, DOES NOT EQUAL, etc. There are several choices. Please see "Operator and Values" for more detailed information.
- Next you can key in a value to match (or not match), or you can pick a field to compare against. As

well; rather than filling in a value; you can check the "Ask User" box. If you save this report, whenever it is run, it will ask the user running the report for the value to compare to the operator.

- Math Function - This allows you to apply math to the values in the column. Only suitable for number based columns.
- Aggregation - Allows you to Summarize, Average, Count, or get a minimum or maximum value from a column. Please see the section on "Aggregation of Data" for more detail.
- Sort Options - Here you can specify a custom sort order, independent of the column order, as well as set the flag to say to sort this column in descending order (biggest to smallest).

One you are finished modifying your filter settings, click the OK button to save them.

Once you have all of your columns and filters in place; click the "Run Report" button to start the report process.

Once your report results are gathered they will appear in the bottom section of the screen. From there you could "Export" your results for further manipulation or for printing.

Report Tables (Views)

Report Table Name	What makes this view special?
view_adjustments	Information on adjustments to the inventory; such as quantity changes
view_aging_list	This table allows access to the accounts receivable aging list and create custom queries for it
view_customers	This brings most of the fields from Customer Maintenance over; it allows you to choose to what pieces of information you want to search and sort by.
view_customer_backorders	The customer backorder table. Customer information as well as information on the parts backordered
view_dead_stock	The dead stock table shows inactive parts and their information
view_gl_distributions	Gives you a way to see different pieces of information relating to GL distributions.
view_invoicedetail	Any part that is in the Invoice details can be reported on in this view,
view_invoiceheader	All fields from the invoice headers are in this view. Fields that are special for this view are the fields for a complete bill-to and ship-to.
view_items	This brings information directly from Item Maintenance. Fields that are unique are all the quantity fields, price levels and back-order information.
view_kit_xref	A table allowing you to build a query on your kit cross-references
view_leadtime	List parts and their average lead time
view_podetail	This is the view you would use if you were looking at purchasing information.
view_sales	Best view to see all of your sales information; contains counterman id, salesperson, and buy-outs but does not show price levels
view_sales_with_inventory_info	Allows you to see the sales information; plus several inventory columns (Min / Max / Price 1 thru 6 / Supplier information / other qty information
view_supplier_part_xref	Create a query on your supplier part number cross references
view_transactions	Any transactions recorded for an item could be pulled up in this view.
view_vendors	Create queries for your vendor information

How to Narrow Results

There are several "filtering" options for your report details. Typically you might want to limit the results you get back by date; or by customer, or maybe even both.

Columns on the Report

Sort		Field Name	Filter Type	Math	Value	Column Name	Fct	Filter Only	
▲	1	company							
▲	2	branch							
▲	3	inv_date							
▲	4	product_line_abbre							
▲	5	ext_price							

To add a filter to a column, highlight it in the "Columns on the Report" list, and double click it, or right click, and select "Edit Filter"

The following screen will appear, allowing you to name your column for this report, and add filter details to it. In the example below, you might want to rename the customer_abbrev column, to just say "Customer".

You'll notice one of the check boxes says "Filter Only" - this means you want to use this column to limit your results; but you don't want it to appear in the results you get back.

"Distinct" flag - This is used to help mostly for aggregate functions such as "COUNT". For example, if you are reading the view_sales table; and want to count unique invoice numbers, the "DISTINCT" flag will let you do so. Otherwise, you will get a count of all invoice numbers, even if they are the same. This might be used to count how many times a part appears on unique invoices. It'll only count the part once per invoice, even if the part is on an invoice multiple times.

The screen shot above shows an example of using the "Value Modifier" column. This allows you to apply a formula to a column in the database, or to a filter. In this particular case; the average_cost_before_receiving will be multiplied by 1.2; and that value will be shown; as well as used as a filter. Notice that the actual column we are looking at is "average_cost_after_receiving". Here, only items where the average_cost_after_receiving is greater than average_cost_before_receiving * 1.2 will be listed.

Operator and Values

Operator Options:

Between

Does Not Equal

Equals

Between

Greater Than

Greater Than or Equal To

Less Than

Less Than or Equal To

Like

Not Like

Values:

Date Filtering

If you want to limit the dates of your report, you can set those dates here.

- As you can see, the "Operator" allows you to tell the report, that you want the dates "BETWEEN" Sept 01, 2013, and Sept 30, 2013. There are several other operators, such as "Greater than" or "Less Than", or EQUALS. This allows you to create a very sophisticated filter for your data.

Instead of setting the filter for start and end date in the filter options you could check "Ask User". When the report it run e360 will ask for the date to be filled in, this is shown below.

Click "Run Report" and this pops up. When "Ask User" is checked you don't have to go in to the edit list to set the date, you set the date when this pop-up shows up.

To fill in the date there are three ways you can input the date; for example you can type in 2013-09-03 or sep 03 2013 or 09 03 2013, all versions will be recognized for September 03, 2013.

As well; with date columns, you can also select some predefined values (in "Advanced mode only"), such as EQUALS LAST MONTH

This allows you to create a report, save it, and each time you go into it, it will run for the previous month. Dates are automatically generated, based on the value you pick. To see the list of available date options, click the ... button.
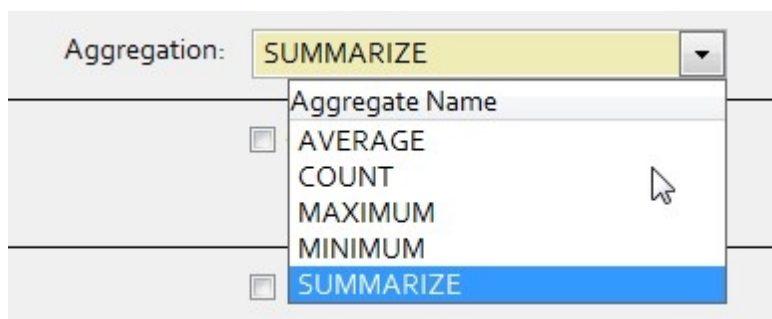
If you don't want to see the date of each transaction, you can click the "Filter Only" check box.

Aggregation of Data

One of the options in the Filter screen, is call "Aggregation".

This is a special function that allows you to gather the results of a numeric field; into a total, or you could average the fields; or count the occurrences.

SUMMARIZE is probably the most widely used aggregation function. SUMMARIZE will give you the total of all items listed in that field.

MAXIMUM tells you the maximum value listed in this column (within the groups you have set up).

MINIMUM tells you the minimum value listed in the column (within the groups you have set up).

If you pick an aggregation, columns listed before it in the report, become "groups". So, if you have a simple report with Invoice Customer, Invoice Date (Filter only), and SUMMARIZE the ext_price column, you'll get a total of the customer's sales within the date range. If you picked "AVERAGE", you'd get an average of their sales (per item line).

Conditional Results

Conditional Results

This allows you to take your results and display a portion of them in a column.

By ticking the "Use a Condition" check box; you may pick an OPERATOR, which allows you to filter certain results into this column.

For example; you could add a condition to the invoice_month column; and when it equals 1, show the extended_price here. This would allow you to build a summary, month by month, across the page, rather than down.

Add invoice_month 12 times; and in each of them, set the condition to be a unique month (1 through 12). Each of the columns would contain data for the specific month.

You could also use this method to summarize data by year if you wanted to create a multi year report, but go across the page, rather than down.

Just remember that you will have to add the column and your conditions for each column you would like. Once for each column you want to show separately.

Your results now look like this:

Branch	Year	January	February	March	April	May	June	July	August	September	October	November	December	Total Sales
CGY	2015	390,604.83	256,016.68	228,171.42	239,549.93	163,626.31	220,227.78	245,494.42	278,691.40	200,202.62	195,466.91	20,638.65	0.00	2,438,690.95
EDM	2015	1,806,652.93	1,463,757.52	1,303,260.04	1,095,821.44	1,137,267.61	1,180,961.38	1,199,433.14	975,607.20	1,046,389.29	997,016.50	104,350.41	0.00	12,310,517.46

Calculated Columns

A Calculated Column is unique, in that it is not read from the database, rather, it does something to the result set.

It is used for applying calculations to your results. So, for example, if you wanted to calculate your profit margin on your results.
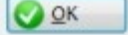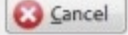
Give your calculated column a name; and then pick fields or use values to build your formulas.

You'll also notice a "Priority" field; this allows you to determine which calculations are applied in which order.

As well, the statement is built left to right, based on the order you place your values / fields.

Let's say for example we wanted to calculate margin from cost and sales, rather than using gross profit as part of the calculation. This complicates things slightly.

So, what we have is the need to apply the calculations in an order differently from how they are placed relative to one another.

"1 -" needs to be at the first position, in order to do the math correctly, but it needs to be applied after the middle section is calculated.

Being able to modify the priority of the calculation, separately from it's position in the formula, is key in making it work correctly.

Load Saved Reports

By clicking the button "Load Reports" on the top, you can access the saved reports.

On the "Load Report" page you can see the name of the report, which view table was used to create the table, the last user to save changes to the report and if it is private or not.

If the report is private, as shown by a green check-mark in the private column, only the person who created the report and the administrator can see the report.

Reports can also be assigned to a security group as a form of private report; so that only Administrators or people inside the specified group can see the report.
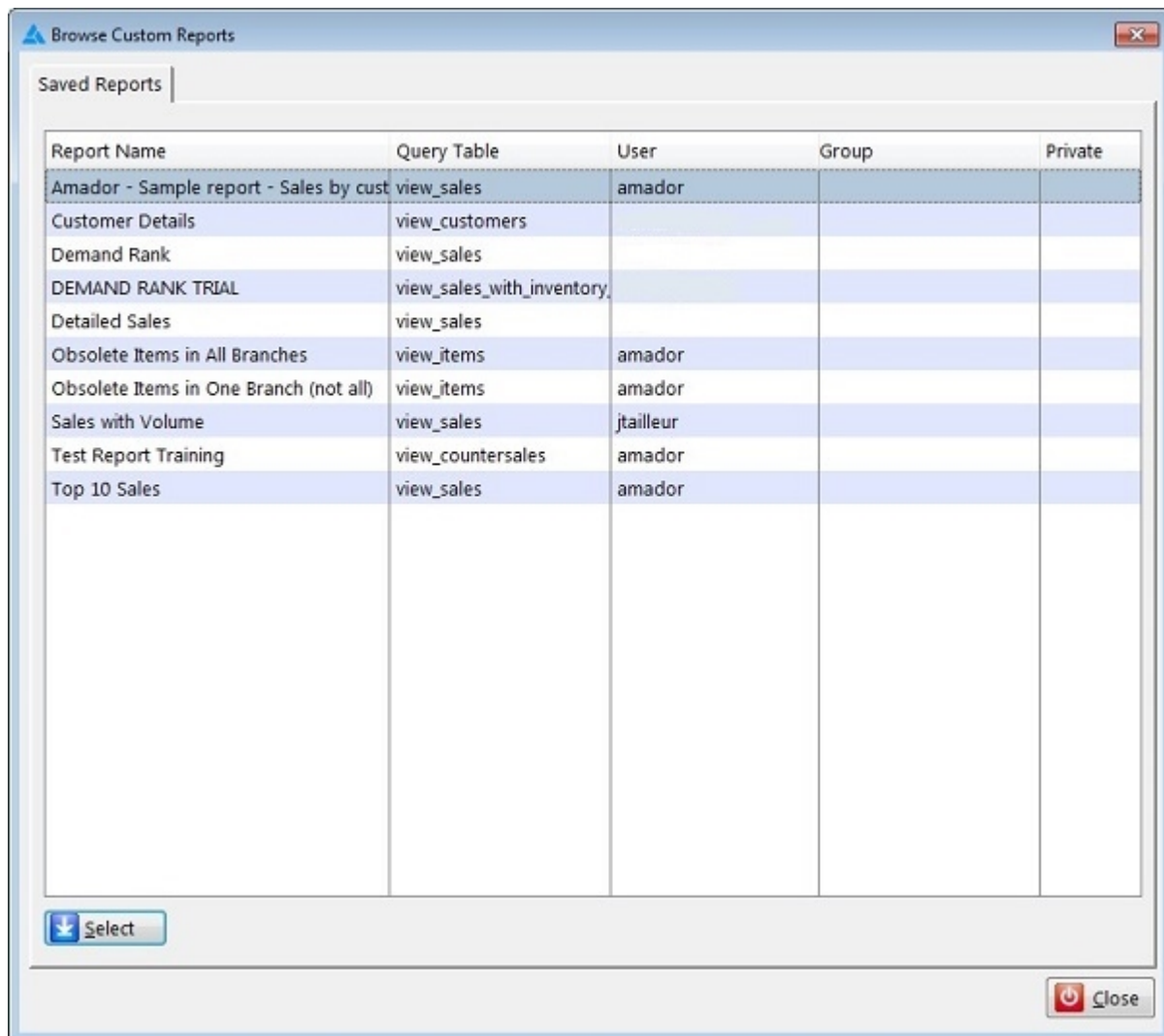
If you create reports be sure to give them a descriptive name. That will make it is easier to find the report you want when there are several reports listed.

Query Tables

Query Tables
There are several different query tables in E360; each of them targeting specific types of information.

view_crm_goals_and_sales
- This table lists details of the goals and sales from the CRM portion of E360. Sales are filtered to only include sales for salespeople listed in the "Salesperson Reference" table; which is administered from the CRM Admin menu in E360.

view_crm_opportunities
- This table lists details of the opportunities from the CRM portion of E360. Opportunities are defined in the CRM portion of E360, under each customer, in their "Opportunities" tab.

view_customer_backorders
- A list of all customer back-orders in E360. Shows customer, part, and order details, such as the order date, and supplier the part is being ordered from.

view_customers
- Customer information - The customer information from Evolution, as well as the custom fields that can be defined in E360 CRM.

view_gl_distributions
- Detailed listing of gl-transactions posted to the gl-distributions table. This table is unfiltered so can very likely contain a large number of records.

view_invoicedetail
- List of the invoice details (parts, comments, etc.) for each invoice. Linked to the invoice header table for details such as the customer name, invoice date, etc. This table does not link to the items table; so information such as part number and description, are from the part when it was placed on the invoice. This table is unfiltered so contains all details of the invoice as they were created, including invoices that were voided. Use this table for detailed invoice information and counting items or summarizing by part type information (such as product line).

view_invoiceheader
- The main portion of the invoice; including the customer's information, ship to, etc. This table is unfiltered; so no invoices are excluded. Please be aware that voided invoices are going to be included here, so if you want them excluded, you'll need to do so in your custom query. This table is excellent for generating summary type queries.

view_items
- Item information; part number, description (including extended descriptions), weights, etc., as well as branch specific information such as quantities, on hand, min, max, etc. There is no filtering on this table; so if you want specific item types; you'll need to include that logic in your query.

view_leadtime
- Detailed information on parts and their lead time, by part, supplier, etc. This table is unfiltered, except that it includes only items received (must have a date received in order to calculate lead time).

view_open_invoice_detail
- This table is the same as the invoicedetail table; but includes details on open invoices only.

view_open_invoice_header
- This table is the same as the invoiceheader table; but includes details on open invoices only.

view_purchasing
- Item purchasing details from purchase orders. Includes the item, order detail, supplier, etc. from the purchase order. Only Voided purchase orders are excluded.

view_receiving
- Detailed listing of items received. Includes the part information, as well as the supplier information, and date received.

view_sales
- Sales details; including customer information, and some invoice information, plus some item information. Only customer sales are listed; so "XFER" type sales are not included.

view_sales_with_inventory_info
- Same as above, but with some extra item information, such as current Min/Max, and quantity on-hand, on-order, etc. This table operates more slowly than the "view_sales" table; due to increased complexity. Use the view_sales table unless you need the extended item information included in this table.

view_transactions

- Item transaction information; such as sales, receiving, adjustments and transfers. No pre-filtering is done on this table; so this table can contain a large number of transactions, and may include details you don't necessarily want. If you want to include or exclude specific transaction types; your query will need to do that filtering.

view_vendors

- Vendor information, such as address, vendor number, gl_account defaults, and currency information.

Scheduling your Query

New in Version 1.15 - Build 1116 is the ability to schedule your query.

Once you have built and saved your new custom query; you can now schedule it by pressing the "Schedule" button.

When you click the "Schedule" button, E360 will actually go through your query like it's going to build it and send it to the server; however, it builds in, and then creates a scheduled query, that you can now edit for times / dates. Because the query is pre-built, you'll want to take care when creating your query. For example; it is best not to ask for specific dates; but use a date phrase instead to make the query move forward in time automatically.

Here is an example using a date phrase:

	3	▲	invoice_date	invoice_date	EQUALS		PREVIOUS 3 MONTHS

This is a much better option, as this report can now be run at any time; and will always give you the previous 3 months in your results.

Currently the valid date phrases are:
- CURRENT MONTH
- LAST MONTH
- NEXT MONTH LAST YEAR
- PREVIOUS 3 MONTHS
- PREVIOUS 7 DAYS
- PREVIOUS MONTH
- PREVIOUS MONTH LAST YEAR
- THIS MONTH LAST YEAR
- TODAY
- YEAR TO DATE CURRENT
- YEAR TO DATE LAST YEAR

Because the query is built using any parameters you "asked" for; you could use this same query to created a scheduled version for each company you'd like to specify, and/or each branch. Please do remember though; any information you "ask" for is then saved as part of the query; the scheduler will simply run it as is.

Editing your scheduled query

Editing a scheduled query

Editing your Scheduled Query

Once you have your query built and saved; and press the "Schedule" button; this form will appear, allowing you to add email addresses, and schedules to this query.

If you don't specify an email address; then this scheduled query will simply be saved in the path specified. The path specified is tied to the server type you are running; for Linux servers, this will be **/usr1/e360_root/ scheduler/**

Adding an email address simply requires you to pick a user from your E360 user table. Only users with email addresses entered will appear in the drop down for you to select.

Adding a schedule

Adding a schedule

Adding a Schedule

Schedule Types: Once, Weekly, and Monthly

A schedule type of "Once" just means run this query at this date and time; do no repeat it. You are just required to fill in a date, and a time to run the query.

A weekly schedule allows you to pick which days of the week you'd like to run this query. You can pick Monday, for example; to have a query scheduled to run each Monday morning. You could also choose to select all the weekdays, to run a query each weekday morning (or afternoon).

A "Monthly" schedule allows you to schedule your query for specific times of the month.

For example; you could run your query on the 1st of each month, or, the "First Monday" of the month, by combining a weekday flag and the keyword "First" from the "Month Day" drop down.

Managing your Schedule Queries

Managing your Scheduled Queries

Your scheduled queries will appear in this list; along with your schedule information, such as type of schedule, and when it's going to run, plus when it last ran.

You can attach more than one schedule to a given query; allowing significant flexibility to your schedule.

To edit your scheduled query; double click it in the upper lists, or select it and press the "EDIT" button below the scheduled queries list.

If you just want to edit the schedule, double click, or highlight the schedule in the lower list; and click the "EDIT" button below it.

Editing an existing query

Editing an existing schedule

Editing an existing scheduled query

This query can be modified, to either add or remove email addresses to send to (or turn the email portion off), as well as add/edit/remove schedules from this query.

Advanced Inventory

Advanced Inventory - Main Window

The Advanced Inventory helps to refine your Min/Max calculations. It is designed to allow you to weigh additional factors into your calculations; and then do "what-if" style analysis. As well;
you can change and save different filters for analyzing your inventory.

Item Settings | Weighting

Filter: Company: DEM | Purchasing Branch: 001 | ☑ Demand for all Branches | Supplier: | 🔵 Load | 🔍 Search
Group: | Product Line: DOCT | DOCT TLS/SUPP/BATT | Pop Code: | User Codes: | 🔵 Save | ✖ Reset

Min Qty Factors
Lead Time: 7 | ☐ Use Item Lead Time
Purchase Cycle: 7 | Safety Factor: 1.50
Threshold: 300.00% | ☐ Adjust for Instability
Instability Factor: 1.50

Trends
Sales Trend ($): -33.50%
☐ Use Item Trend
Apply this Trend: 0.00%
Seasonality Weighting: 40.00%

Max Qty Factors
Desired Service Level: 95.0%

Months Stocked
Min Months Stocked: 6

🔵 Calc All | 🔵 Calc Item
☐ Hide Unchanged Items

D.I.	L	Sup.	Pop	Usr	Product Line	Part Number	Part Description	Pur Pkg	Pur Ratio	Avg Lead	Trend	Unit Cost	Avail. Qty	On Order	Current Min	Current Max	Suggested/New Min	Suggested/New Max	Cost at Max Current	Cost at Max Suggested	Change
		2875			DOCT	3B8686	FITTING	1	1	0	0.00%	0.390	30	0	0	1	0	0	0.39	0.00	0.00
✓		2875			DOCT	3B8489	GREASE FITTING	25	1	2	0.00%	0.451	31	0	36	61	0	0	27.51	0.00	0.00
		2875			DOCT	4B4098	PLUG	10	1	0	0.00%	0.620	6	0	1	11	0	0	6.82	0.00	0.00
		2875			DOCT	SIG103	DEFROSTER FAN	1	1	1	0.00%	28.160	4	0	2	4	0	0	112.64	0.00	0.00
		2875			DOCT	SIG106	DEFROSTER FAN	1	1	2	0.00%	28.750	5	0	3	5	0	0	143.75	0.00	0.00
		2875			DOCT	1B8744	KEY - 1/4X3/4	1	1	1	0.00%	1.626	15	0	2	4	0	0	6.50	0.00	0.00
		2875			DOCT	3B4605	COTTER PIN	100	1	0	0.00%	0.820	90	0	0	100	0	0	82.00	0.00	0.00
		2875			DOCT	2901	FAN BLADE	1	1	0	0.00%	17.000	2	0	0	0	0	0	0.00	0.00	0.00
		2875			DOCT	FP106	DEFROSTER FAN	1	1	0	0.00%	43.840	12	0	1	2	0	0	87.68	0.00	0.00
		2875			DOCT	4B2047	NUT	1	1	0	0.00%	0.020	187	0	1	2	0	0	0.04	0.00	0.00

✏ Edit | 🔵 | Parts Listed: 111 | at Avail Qty: 1,891 | Total @ Max: 1,703 | 0 | 0.00

DEMAND/HITS	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	Total
Past 12 Mnths	0	6 / 1	0	0	0	0	0	0	0	0	0	0	6 / 1
13-24 Mnths	0	0	0	0	0	0	0	0	0	0	0	0	0 / 0
Avg Day:	0.00	0.11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Seasonality:	0.000	3.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	

🔧 Substitute Demand

📤 Export | 📋 Post To Evolution | Ctrl-R: Set Filter   Ctrl-Shift-R: Clear Filter | ❌ Close

Column Descriptions

D.I. - Demand Instability (Any part where it's Max quantity sold on an invoice is more than the specified % above the average quantity sold on an invoice - in this example; that would be 300%)

L - Locked - This line was manually edited and will no longer be calculated

Sup. - Supplier Abbrev

Pop - POP Code

Usr - User Code

Product Line

Part Description

Pur Pkg - Purchase Package

Pur Ratio - Purchase Ratio

Avg Lead - The calculated average lead time for this part over the past 12 months (released vs. received)

Trend - Item's demand trend over the past 24 months

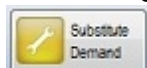Unit Cost - The item's currently cost from inventory

Avail. Qty - The available quantity to sell (On-hand Qty - Reserved Qty)

On Order

Current Min / Max - The current Min/Max quantities from your inventory file

Suggested/New Min/Max - After to set your parameters and click the "Calc All" button, you will see your new suggested Min/Max numbers in these columns

If the part you have highlighted in your list was substituted with something else; the "Substitute Demand" button will light up.

🔧 Substitute Demand

Press the button to show the list of substitutes that were sold instead of this part.

As you can see, this shows what part, and the dates and quantities sold. As well; you can see the "Qty On Hand" for the substitute, as well as it's minimum and maximum quantity.

The substituted demand is NOT counted towards min/max calculations; it is simply there to provide information.

The issue is that a substitute may or may not be real demand. For example; when selling a spark plug, you may have other brands set up to substitute for each other; but when you sell them; the customer may have asked for that specific brand of plug. It's not a substitute at all; even though it could be used as such.

Setting the factors

The Advanced Inventory helps to refine your Min/Max calculations.

Build your inventory list using the above selections. You must select the "Company", and "Purchasing Branch", and then one of the other selections.

Filter
* Company - The company you are calculating Min/Max for
* Purchasing Branch - Which is the purchasing branch
Demand for all Branches - Do you want to count the demand for all branches, not just the purchasing branch? Most often used in a centralized purchasing situation
Supplier - List parts with this supplier set up as the primary supplier for the part
Group - Parts in this product group
Product Line - Parts in this product line

Pop Code - Parts with this POP Code(s)
User Codes - Parts with this User Code(s)

* Required - plus one other filter item

** Factors and Trends **

Here you will set up the various options to create your Min/Max calculations.

** Min Qty Factors **

Lead Time: How long does it take for you to get the part into your stock from the time you place the order.
  - o   If you picked a supplier, then the lead time you've specified for the supplier within Evolution will be the default here.

Use Item Lead Time: Check mark on or off - If checked; use the calculated item's lead time instead of the "Lead Time". Any item with a calculated lead time of 0, will use the value from "Lead Time"

Purchase Cycle: 7 - How often do you purchase this part (number of days) - 7 would mean the part is purchased once per week. 30 would mean once per month (roughly)

Safety Factor: Add this factor when calculating the minimum quantity in order to account for possible delays in shipping or spikes in demand. A value of 1.5 would add a 50% increase to the calculated minimum quantity

Threshold: 300% - When the max quantity sold on an invoice is more than 300% of the average quantity sold on an invoice; consider this part as having unstable demand.

Adjust for instability - If this is check marked; then parts flagged as having unstable demand will have an additional factor applied to their minimum quantity

Instability Factor: If set to adjust for instability - this factor will be added to the minimum quantity calculation for parts with unstable demand. A value above 1 will add to the minimum quantity, a value below 1 (ie. **.75**) will reduce the minimum quantity.

- ●   *There are two additional factors; that are set up in the Inventory Settings menu. These are also used to calculate Minimum Qty. See: Cost and Hits Weighting*

** Trends **

Sales Trend ($): This is the sales trend for the selected company. The previous 12 months vs. month 13 through 24. This is just a calculation, no trend is applied; unless you check mark the "Use Item Trend" or a key a value into "Apply this Trend".

Use Item Trend: Trends are calculated for each item; the past year sales, vs. the year before that. If this is check marked; the formula will be adjusted for each item based on it's sales history.

Apply this Trend: If you do not check mark "Use Item Trend", and wish to apply an over all trend, key the value in here. You can use a negative value to represent a slow down.

Seasonality Index Weighting: Each month has a "seasonality" index, which is calculated for each part number. The index represents how much more or less than the average month this specific month represents. The weighting will determine how much of the seasonality "Index" to apply. Seasonality is calculated on two years sales if 24 months of history are available, or the previous year if there are 12 months available.

** "Max Qty Factors **

Desired Service Level: This comes from a standardized table built into E360. Service level specifies how often demand is met entirely (how often is each order completely filled).

You can see the table here: The Calculations

** Months Stocked **

Min Months Stocked: 6 - A part must have been stocked for at least this many months before it will show up in this list for calculation

DEMAND/HITS

DEMAND/HITS	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	Total
Past 12 Mnths	91/7	25/3	27/9	4/3	11/4	4/1	2/1	12/5	23/4	5/3	10/1	7/4	221/45
13-24 Mnths	18/9	115/13	51/16	88/15	5/2	60/15	69/10	31/12	12/6	32/7	74/18	12/4	567/127
Avg Day:	1.76	2.50	1.26	1.53	0.26	1.07	1.15	0.69	0.58	0.60	1.40	0.31	
Seasonality:	1.950	1.275	1.170	0.793	0.689	0.693	0.668	0.808	1.000	0.610	0.894	0.590	

The part that's highlighted in your list will have it's demand for the past 24 months shown here. The first number is the quantity sold; and the second number is the number of times it was sold, for the month listed above.
This list is now the past 24 months; starting with the current month.

Once you've added / modified the different factors to your liking, Click the "Calc All" or "Calc Item" button to see what E360 recommends for your Min/Max.

Cost and Hits Weighting

Cost and Hits Weighting

Cost Weighting: This table allows you to modify your weighting of the inventory based on it's cost. For example; you could carry larger amounts of less expensive items. Now this is entirely optional, and the system you employ is completely up to you to set up. The table is empty by default; and, you only need to specify exceptions here. If a cost factor is not found; it is simply set to 1; so no change will occur.

* Weights can range from .01 to 99999.99. .01 would mean the final quantity would be multiplied by .01 (1/10th) reducing the amount, while a value above 1 will add to the quantity.

Hits Weighting: This allows you to modify the weighting of an item based on how often it is purchased (not the quantity sold). An item that sells very often might need more or less weighting than an item that sells sporadically. Again, this table is empty by default; so no weighting is applied.

* Weights can range from .01 to 99999.99. .01 would mean the final quantity would be multiplied by .01 (1/10th); reducing the amount calculated, while a value above 1 will add to the calculation.

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Save Inventory Settings

Once you have created a filter; by setting the company, branch, and then either supplier, group, product line (sub-line), Pop Code, or User Codes, click the "Search Button" to load parts into the list that match those filters.

Once you have created your filter elements; you can then hit "Search" to build your parts list.

The yellow panel just above this parts list; contains the settings that actual affect your Min/Max calculations. Once you have these settings to your desired values; click the "Calc All" button, or the "Calc Item" button.

Sup.	Pop	Usr	Product Line	Part Number	Part Description	Pur Pkg	Pur Ratio	Avg Lead	Trend	Unit Cost	Avail. Qty	On Order	Current Min	Current Max	Suggested / New Min	Suggested / New Max	Cost at Max Current	Cost at Max Suggested	Change	
HPAUL			101	101	197-193 FH SKT WOODSCRE	100	1	0	101.90%	0.014	172	0	100	200	91	191	2.80	2.67	-0.13	⊖
HPAUL			101	10112	197-197 FH SKT WOOD	100	1	0	-32.50%	0.019	107	0	10	110	104	304	2.09	5.78	3.69	⊕
HPAUL			101	83	197-152 FH SKT WOODSCRE	100	1	0	-41.00%	0.035	20	0	100	400	95	295	14.00	10.33	-3.67	⊖
HPAUL			101	10114	197-195 FH SKT WOOD	100	1	0	89.60%	0.017	101	0	100	200	75	175	3.40	2.98	-0.42	⊖
HPAUL			101	82	197-148 FH SKT WOODSCRE	100	1	0	-17.00%	0.017	200	0	100	200	103	303	3.40	5.15	1.75	⊕
HPAUL			101	81	197-141 FH SKT WOODSCRE	100	1	0	19.50%	0.011	150	0	100	200	73	173	2.20	1.90	-0.30	⊖
HPAUL			101	14112	197-284 FH SKT WOOD	100	1	0	0.00%	0.035	103	0	10	110	0	0	3.85	0.00	-3.85	⊖
HPAUL			101	834	197-139 FH SKT WOODSCRE	100	1	0	-50.20%	0.010	115	0	10	110	28	128	1.10	1.28	0.18	⊕
HPAUL			101	103	197-204 FH SKT WOOD	100	1	0	72.30%	0.039	0	0	100	200	178	378	7.80	14.74	6.94	⊕
HPAUL			101	102	197-200 FH SKT WOOD	100	1	0	90.80%	0.026	0	0	100	200	129	329	5.20	8.55	3.35	⊕

Edit   Parts Listed: 18   at Avail Qty: 25   Total @ Max: 60   77   17.34

DEMAND/HITS	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2015	100 / 1	0	20 / 1	100 / 1	100 / 1	0	0	0	0	0	100 / 1	0	420 / 5
2014	0	0	100 / 1	0	0	100 / 1	8 / 1	0	0	0	0	0	208 / 3
2013	1 / 1	0	0	0	0	0	0	0	0	0	0	0	1 / 1
Avg Day:	1.09	0.00	1.29	1.11	1.08	1.11	0.09	0.00	0.00	0.00	1.11	0.00	
Seasonality:	1.464	0.000	1.368	1.464	1.464	1.201	0.340	0.000	0.000	0.000	1.464	0.000	

You can change the settings and then recalculate to see how parts are affected. You can change settings and then save again if you want to keep your updated settings.

As you can see from the list; the highlighted part will also display it's demand history in the lower portion of the screen. First is the quantity sold in the period, then the "hits" or number of times the item sold. So, for January 2015, a quantity of 100 sold; on a single invoice.

Load Inventory Settings

To load a set of values you saved previously; click the "Load" button.
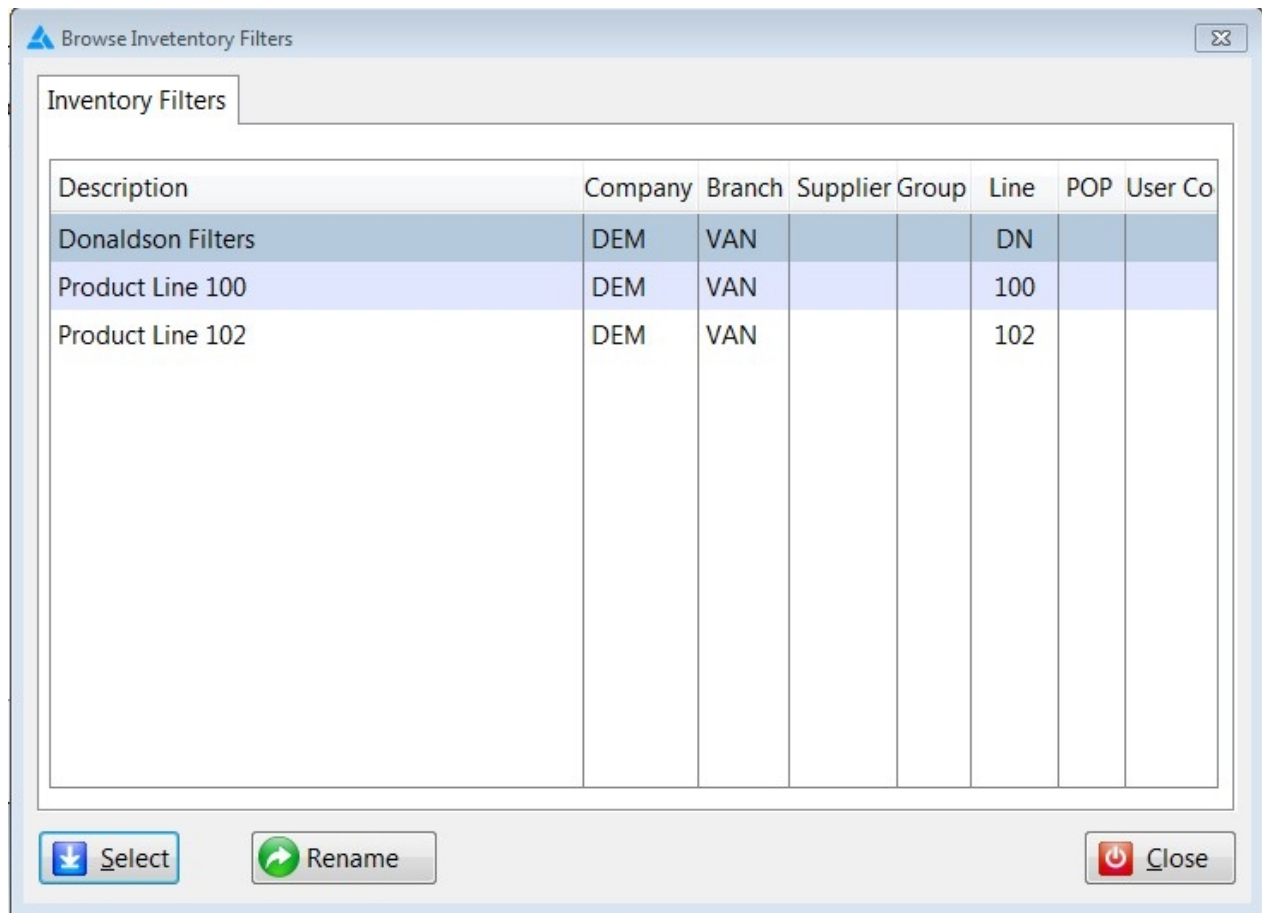
As you can see, you can save multiple filters. To load one, highlight it in the list; and click the "Select" button, or just double click the filter you want. This will bring the filter values as well as your calculation settings and load the associated parts. It will not do a calculation.

The Calculations

The Calculations

Suggested inventory levels are calculated as follows:

Daily Demand = Total goods sold for the previous 12 months, divided by 365.

* Daily Demand can be modified by the seasonality index for the period the goods would typically arrive (lead time + purchase cycle days)
  So, if you are calculating in October for good that would likely arrive in November (for example: 15 days lead time, 15 days purchase cycle), then it will be Novembers index that is used to determine the daily demand.

Minimum Qty formula = (Purchase Cycle + Lead Time) * Daily Demand * Safety Factor * Instability Factor * Trend * Hits Weighting * Cost Weighting

Maximum Qty formula = Minimum Qty * Service Weight

* Standard Purchase Package and Purchase Ratio are also used to determine Maximum Qty and are applied after the base Max Qty calculation.

Service Level Factor

DesiredServiceLevel = **55%**
ServiceWeight = 0.126

DesiredServiceLevel = **60%**
ServiceWeight = 0.253

DesiredServiceLevel = **65%**
ServiceWeight = 0.385

DesiredServiceLevel = **70%**
ServiceWeight = 0.524

DesiredServiceLevel = **75%**
ServiceWeight = 0.674

DesiredServiceLevel = **80%**
ServiceWeight = 0.842

DesiredServiceLevel = **85%**
ServiceWeight = 1.036

DesiredServiceLevel = **90%**
ServiceWeight = 1.282

DesiredServiceLevel = **95%**
ServiceWeight = 1.645

DesiredServiceLevel = **96%**
ServiceWeight = 1.751

DesiredServiceLevel = **97%**
ServiceWeight = 1.881

DesiredServiceLevel = **98%**
ServiceWeight = 2.054

DesiredServiceLevel = **99%**
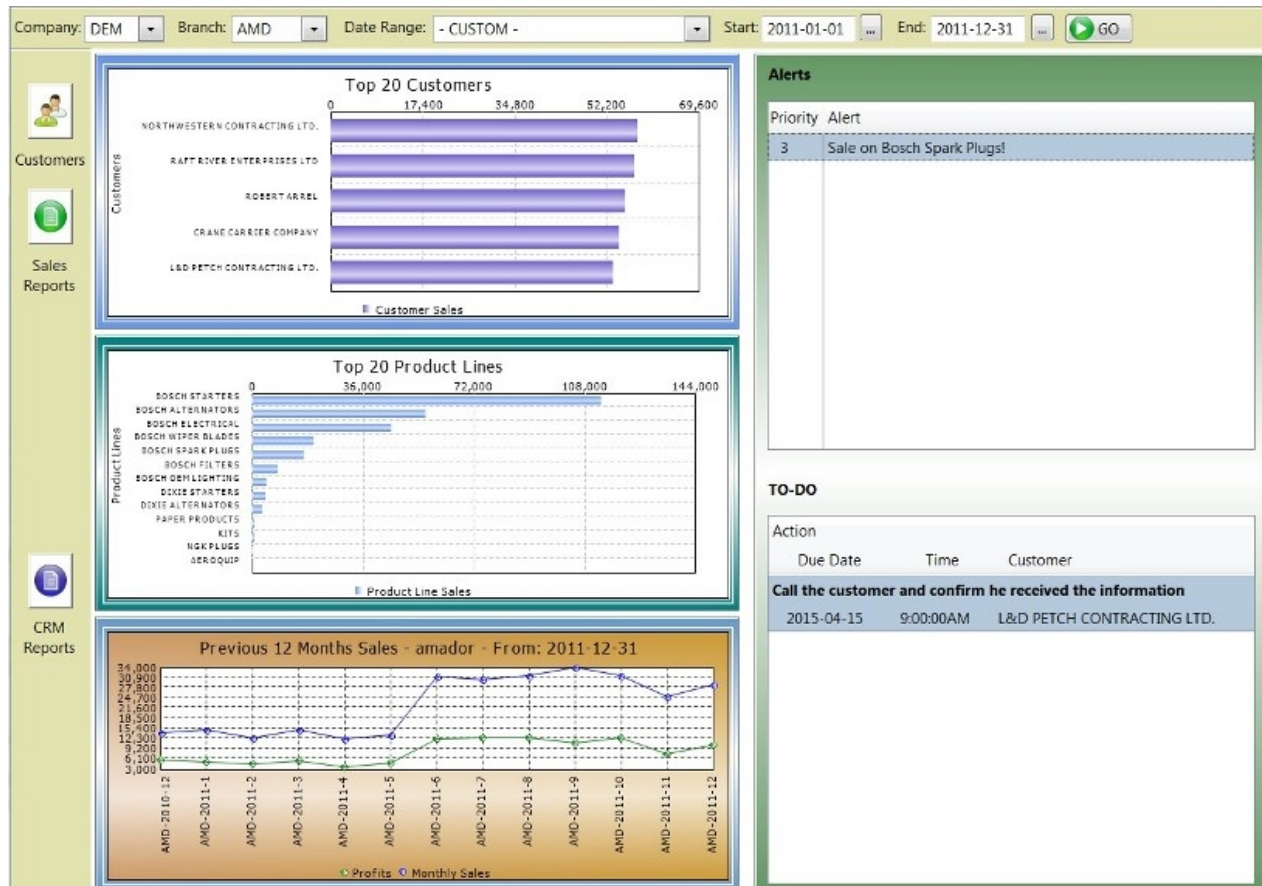ServiceWeight = 2.326

DesiredServiceLevel = **99.5%**
ServiceWeight = 2.576

DesiredServiceLevel = **99.9%**
ServiceWeight = 3.09

CRM

CRM - Customer Relationship Management

The CRM is made up of the CRM Dashboard, the Customer List, and several drill downs that are specific to a customer and/or salesperson.

The CRM Dashboard shows the Top 20 customers for the salesperson logged in within the date range specified in the top toolbar, as well as the top 20 product lines for the same date range, and the salesperson's sales, by month, from the end date and the previous 12 months.

Click on the **Customer** button to display the customers from Evolution, as well as any prospects that you have added to the list.

Click on the "**Sales Reports**" button to see the CRM Drill downs.

Click on the "**CRM Reports**" button to see the Administration reports for the CRM.

Customers

The Customer List

The Customer list shows you the customer name, number, and address information. You'll also see spots for multiple contacts, and multiple phone numbers for each contact, as well as a "Notes" section.

- If the customer comes from Evolution, you can add contacts, phone numbers, note, and custom field information to the customer, but you can't edit any of the fields that come directly from Evolution; they will need to be edited from within Evolution.
- To add a prospect, click the "Insert" button just underneath the customer list. You can not add an Evolution customer from this list, they must come from Autopoint Evolution.
- To edit a customer, highlight the customer you want to edit, and click the "Edit" button, or just double click on the customer in the list.
    - To add a contact to a customer; select the customer in the list, and click the "Insert Button" just below the "Contacts" list.
    - To add a phone number to an existing contact, highlight the contact in the contact list, and click the "Insert" button below the phone number list.
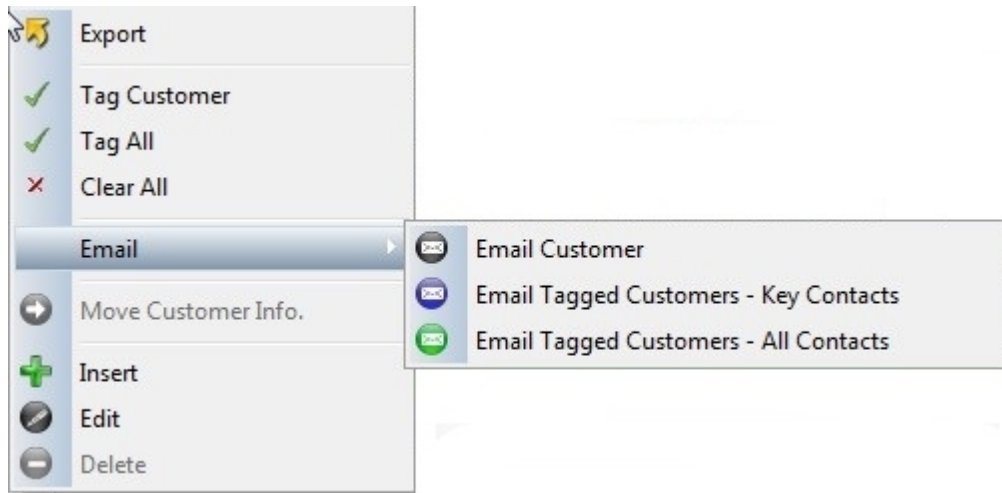
Contacts, phone numbers, and notes can also be added from within the "Edit" customer screen.

If the customer you have selected is a "Prospect" you can move the information to an Evolution customer, using the "Move Info." button. This would occur typically because a prospect has become a customer; and you want to keep any notes, contacts, phone numbers, to the newly created account.

The Right Click menu

There is also a "Right Click" menu available from the customer list.

From the "Right Click" menu you can export the customer list, tag a customer, tag all customers, clear the tags, send an email to a specific customer, or tagged customers, or Move customer info, or Insert, Edit, or Delete (prospect only) from this right click menu. Remember that when you "Right Click", the if the menu choice is specific to a customer, it will apply to the highlighted customer.

Export

✓ Tag Customer

✓ Tag All

✗ Clear All

Email ▸ ✉ Email Customer
✉ Email Tagged Customers - Key Contacts
✉ Email Tagged Customers - All Contacts

Move Customer Info.

➕ Insert

Edit

➖ Delete

Filtering your list

Filtering the list

You can filter the list of customers in several different ways, as well as search for a customer.

| Customer Search: | | | Search | Reset | ☑ Evolution Customers | ☑ Prospects | Query | | Export |
| Sales Person: | ▾ | ☐ My Accounts | | | ☐ Show Only Tagged | | | | |

Customer/prospects -> By checking (or un-checking) either box you can change the list of customers that show up.

● Evolution customers are customers that exist in you customer file in Evolution.

● Prospects are potential customers that are created here in E360, they are similar to sales leads.

You can also limit the customer list by salesperson code.

● *Security settings determine if a salesperson can see initials unrelated to their login.*

If you type something into the "Customer Search" box, and then click the "Search" button, the system will search your customer list for matches.
● *From the Customer table; the search looks for matches in the Customer Name, Customer Contact, First Name, Last Name, Customer Abbrev, Address1, Address2 and City fields.*
● *From the contacts field; Contact Name and Contact Email are searched.*

This may result in more results than you want. If you want more specific results, pressing the query button opens up a new window.

This allows you to search specific fields in the customer record for values.

So, for example; if you want all customer's within a city, you can type in the city you want in the "City" field. As well; your custom tabs and fields are displayed here, allowing you to filter your list based on those fields.

When you are finished adding your filter information, click the OK button to return to the customer list and filter it.

Edit Customer

Edit Customer

When you select a customer to view, you are taken to this customer edit page. If the customer is assigned to another salesman you are not permitted to make changes.

If it is a Prospect customer you can change any of the fields you see.

However, if it is an Evolution customer you can not change the Customer Information because it comes directly from Evolution.

Here you change any of the fields you see only if they are a Prospect. However, if they are an Evolution customer you can not make changes to the Customer Information.

Beside the Customer Information you can see a few buttons. These buttons are for Sales and Analysis.

Sales button - Brings you to see that Customers' Sales, still respecting the selections in the top tool-bar.

Analysis button - Brings you to see the Customers' Sales Analysis.

Tabs by default are Notes, Contacts, Credit Info, and Goals.

Additional Tabs can be created and chosen as an Administrator in the Administrator menu under User Defined Fields.

You'll notice when you are in the CRM, the Dashboard toolbar at the top stays visible. This is so when you click on the Sales or Sales Analysis buttons, those reports will respect the restrictions set by the toolbar.

According to this tool-bar, for each customer you drill into and then go into the sales button you will see sales for the DEM company and the EDM branch from November 01, 2013 to November 25, 2013.

Notes

CRM - Customer Notes

The customer notes section shows you any notes for this specific customer. Notes can be added, edited, or removed from here. Only an "Administrator" can see all notes, "Normal" users can only see notes they have entered.

To add a new note, click on the "+" button, or press the "Insert" key.

To edit an existing note; double click on the note, or highlight it and press the ENTER key, or click on the edit button.

The note is automatically dated and time stamped for the current date and time, plus, your user id is added to the note.

Pick a note reason (these are defined in the Administration), and type a note. Notes can be up to 16,000 characters long.

You can also specify a "Phase" for this note (similar to Opportunities), and a due date, due time, and an Action Required. Notes will always show on the "Notes" portion of the CRM, but notes that are not yet marked as "Completed" and that have a due date, will show up on the CRM Dashboard under the To-Do list for the person who entered the note.

Contacts

Customer Contacts

Customers can have multiple contacts defined, and each contact can have multiple phone numbers defined.

The phone numbers displayed on the right side of the screen are tied to the selected customer.

To add a new contact, click on the "+" button above the contact list.

To edit an existing contact; double click on it, or highlight it and click the Edit button.

Enter or edit the contact name, email, etc. and click OK to save the changes.

The "Key Contact" check box allows you to define key contacts within the company. This is used when sending Emails from the CRM list; where you can chose to send an email to all "Key Contacts" for tagged companies.

Credit Info

Credit Info

The customer credit information comes from Evolution. It can not be edited, but is there for information only.

Custom Tabs

Custom Tabs and User Defined Fields

Opportunities

Opportunities

Phases are defined in "CRM Admin", under the "Pipeline Phases" menu item.

Phases are stages your opportunities are current in (for example: Stage 1 could be "Lead").

You may define as many Phases as you required.

Opportunities are entered in the CRM, inside each customer or prospect.

To add a new opportunity, click the "Insert" button.

This allows you to define your opportunity for this customer.

Goals

Sales Reports

Sales Reports
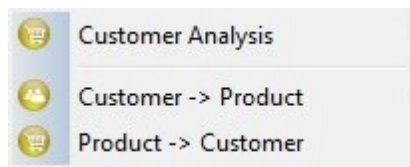
Customer Analysis
Compare the customers (for the salesperson logged in) and their Period 1 vs. Period 2 performance

Customer -> Product
Drill down by Customer to Product information; just for customer's assigned to the currently logged in Salesperson

Product -> Customer
Drill down by Product information, then to Customer; just for customer's assigned to the currently logged in Salesperson

CRM - Customer Analysis

CRM - Customer Analysis

* This is identical to the Dashboard (BI) list; except this one will only list customers associated with the salesperson who's logged in.

The customer sales analysis screen initially comes up blank, except the period 1 dates will be set to one year previous to the currently selected dates in the dashboard toolbar, and the period 2 dates will be set to the dates from the toolbar.

In order to build anything in the list; you must make any adjustments to the dates in the periods (if any changes are required), and then click the "Go" button.

This tool is useful for analyzing customers who's sales or profit have gone up or down between the two periods specified.

For example; you could put a start date of August 1, 2013 and an end date of August 31, 2013 in the "Previous Period" section, and then a start date of September 1, 2013 and an end date of Sept 30, 2013 in the "Current Period" section, and click the "Go" button.

The date periods are completely up to you to determine how you'd like to analyze your data.

Branch	Cus. No.	Customer	Period 1 Sales	Period 2 Sales	Variance	Trend
AMD	20	ALBERCO CONSTRUCTION LTD.	0.00	13,318.50	13,318.50	⬆
AMD	850003	ANGIE NICKLE	0.00	89.76	89.76	⬆
AMD	15	ATLAS EQUIPMENT & SUPPLY	0.00	61.98	61.98	⬆
AMD	451	BIRD CONSTRUCTION RENTALS	0.00	0.10	0.10	⬆
AMD	999999	Cash Sale	0.00	15.00	15.00	⬆
AMD	23	CRANE CARRIER COMPANY	20,056.21	108.84	-19,947.37	⬇
AMD	45	CRISWEL TRANSMISSION	18,270.34	0.00	-18,270.34	⬇
AMD	221850	DAVE ROSS TRUCKING	20,242.91	29.00	-20,213.91	⬇
AMD	22	EASTSIDE TUNEUP TO GO	0.00	730.00	730.00	⬆
AMD	89020	GWIL IND. CRANE SERVICE DIV.	0.00	73.64	73.64	⬆
AMD	199000	L&D PETCH CONTRACTING LTD.	19,451.70	0.00	-19,451.70	⬇
AMD	850001	MS. NICOLE L. CARRIERE	0.00	160.00	160.00	⬆
AMD	255750	NORTHWESTERN CONTRACTING LTD.	20,533.69	0.00	-20,533.69	⬇
AMD	24	PARTS TO GO	0.00	-33.86	-33.86	⬇
AMD	6042	PCL - MAXAM A JOINT VENTURE	0.00	-10.17	-10.17	⬇
AMD	213000	RAFT RIVER ENTERPRISES LTD	20,133.60	0.00	-20,133.60	⬇
AMD	11065	ROBERT ARREL	17,857.22	0.00	-17,857.22	⬇
AMD	25	Wellside Industries	0.00	266.11	266.11	⬆

As you can see, the list displays the customer, the period 1 vs. period 2 sales, the variance between the periods, and then an icon to easily show which customers are up or down.

You can also change the "Analysis Type" between Sales or Profits ("Sales" is the default); and you can look for a decrease (down) or an increase (up) of sales or profits between the two periods, or show "All" results (the default).

Once you run your analysis, you can then drill down into the selected customer. The list is built initially by Customer.

To drill down into a customer, double click on them in the list, or, highlight them, and click the right arrow button above the list, or, press the F2 key.

The next level in the drill down shows you the sales (or profits) for the customer by product line, and the sales (or profits) of each product line period 1 vs. period 2. You can also then drill down into a specific product line to show the individual part sales.

CRM - Customer -> Product

CRM - Customers -> Products

*** This is identical to the Dashboard (BI) list; except this one will only list customers associated with the salesperson who's logged in.**

The "Customers -> Products" list; initially shows customer sales, just like the "Sales by Customer" list.

Branch	Customer	Cus No.	Sales	Costs	Gross Profit	Margin	SLS%
AMD	ALBERCO CONSTRUCTION LTD.	20	520.000	375.760	144.240	27.738%	0.13%
AMD	ATLAS EQUIPMENT & SUPPLY	15	23.910	12.190	11.720	49.017%	0.01%
AMD	BIRD CONSTRUCTION RENTALS	451	3,551.490	2,463.520	1,087.970	30.634%	0.92%
AMD	CASH CUSTOMER	999011	5.000	5.000	0.000	0.000%	0.00%
AMD	CASMAN CONSTRUCTION LTD	715	-97.050	-26.520	-70.530	-72.674%	-0.03%
AMD	CRANE CARRIER COMPANY	23	54,542.675	35,325.697	19,216.978	35.233%	14.06%
AMD	CRISWEL TRANSMISSION	45	51,622.567	32,799.530	18,823.037	36.463%	13.31%
AMD	DAVE ROSS TRUCKING	221850	52,600.085	33,592.081	19,008.004	36.137%	13.56%
AMD	G.D. JOHNSON CONSTRUCTION PRODUCTS LTD	3603	740.000	534.270	205.730	27.801%	0.19%
AMD	L&D PETCH CONTRACTING LTD.	199000	53,434.955	34,236.976	19,197.979	35.928%	13.77%
AMD	MS. NICOLE L. CARRIERE	850001	37.300	20.733	16.567	44.416%	0.01%
AMD	NORTHWESTERN CONTRACTING LTD.	255750	57,891.820	35,910.604	21,981.216	37.969%	14.92%
AMD	PARTS TO GO	24	6.610	3.579	3.031	45.855%	0.00%
AMD	PCL - MAXAM A JOINT VENTURE	6042	-375.300	-321.870	-53.430	-14.237%	-0.10%
AMD	RAFT RIVER ENTERPRISES LTD	213000	57,367.425	36,820.403	20,547.022	35.817%	14.79%
AMD	RENTCO EQUIPMENT LTD.	6519	910.000	657.580	252.420	27.738%	0.23%
AMD	ROBERT ARREL	11065	55,682.345	35,942.452	19,739.893	35.451%	14.35%
AMD	WEST EDMONTON MALL PH.3	8518	-520.000	-375.760	-144.240	-27.738%	-0.13%
	TOTALS:		387,943.86	247,976.22	139,967.61	36.08%	

When you drill down into the Customers -> Products list, instead of sales being listed by months, and days, they are listed by product group / product line.

Branch	Group	Line	Sub	Line Description	Sales	Costs	Gross Profit	Margin	SLS%
GRA	01	GENE		GENERAL ELECTRIC	32.58	26.06	6.52	20.01%	1.90%
GRA	01	LITT	1	LITTLE FUSE	24.20	12.10	12.10	50.00%	1.41%
GRA	01	TRIC	1	TRICO PRODUCTS	48.88	40.72	8.16	16.70%	2.85%
GRA	04	CRC		CRC	9.96	7.96	2.00	20.08%	0.58%
GRA	04	JOES		JOES HAND CLEANER	16.35	13.08	3.27	20.00%	0.95%
GRA	04	RECO		RECOCHEM CHEMICALS	202.94	162.12	40.82	20.11%	11.83%
GRA	07	TUFF		TUFF GRADE	92.64	69.44	23.20	25.04%	5.40%
GRA	10	COLU	1	COLUMBIA FIRE &	47.52	28.51	19.01	40.00%	2.77%
GRA	10	LOG		LOG BOOK	10.89	8.71	2.18	20.00%	0.64%
GRA	10	NORT		NORTH SAFETY	76.70	61.40	15.30	19.95%	4.47%
GRA	11	CLEA		CLEAN FUNNEL	14.16	8.50	5.66	39.97%	0.83%
GRA	11	DYNA		DYNALINE PRODUCTS	2.40	1.56	0.84	35.00%	0.14%
GRA	12	KIMB		KIMBERLY CLARK	18.06	12.64	5.42	30.00%	1.05%
GRA	26	SCEP		SCEPTER	135.84	113.18	22.66	16.68%	7.92%
GRA	33	CHVA		HDMO	87.90	67.68	20.22	23.00%	5.13%
GRA	33	CHVC		COOLANT	103.32	82.68	20.64	19.98%	6.03%
GRA	33	CHVR		CHEVRON OIL	422.91	331.95	90.96	21.51%	24.66%
GRA	33	CHVR	1	CHEVRON ANTIFREEZE	258.99	207.18	51.81	20.00%	15.10%
GRA	33	LUCA		LUCAS OIL	51.56	41.24	10.32	20.02%	3.01%
GRA	33	TEXA		TEXACO	44.52	35.64	8.88	19.95%	2.60%
GRA	95	ENVI		ENVIRO CHARGES	12.45	12.45	0.00	0.00%	0.73%
TOTALS:					1,714.76	1,344.80	369.96	21.58%	

To drill down further, double click on the product line you'd like to see, or highlight it and press F2, or, right click on the line you'd like to drill into, and a drill down menu will appear.

CRM - Product -> Customer

CRM - Products -> Customer

*** This is identical to the Dashboard (BI) list; except this one will only list customers associated with the salesperson who's logged in.**

To drill into a specific product line; highlight it, and press F2 (or press the right arrow button at the top left), or right click the row and use the drill down menu to drill down to the next level.

Com	Brn	Grp	Product Line	Line Description	Sales	Costs	Gross Profit	Margin	SLS%
DEM	AMD	1	AERO	AEROQUIP	179.80	116.80	63.00	35.04%	0.05%
DEM	AMD	A1	DIXS	DIXIE STARTERS	6,357.40	3,594.59	2,762.82	43.46%	1.64%
DEM	AMD	A1	FRA	FRAM	1.20	0.00	1.20	100.00%	0.00%
DEM	AMD	A1	HAST	HASTINGS TOOLS	28.91	17.19	11.72	40.54%	0.01%
DEM	AMD	A1	KIT	KITS	1,074.03	746.29	327.74	30.51%	0.28%
DEM	AMD	A1	NGKP	NGK PLUGS	438.00	195.84	242.16	55.29%	0.11%
DEM	AMD	A1	PUR	PUROLATOR FILTERS	-52.33	-43.72	-8.60	-16.44%	-0.01%
DEM	AMD	A2	ACDP	AC DELCO PLUGS	32.80	17.92	14.88	45.37%	0.01%
DEM	AMD	A3	BOSF	BOSCH FILTERS	11,144.90	6,828.61	4,316.29	38.73%	2.87%
DEM	AMD	A3	BOSH	BOSCH OEM LIGHTING	6,278.73	2,879.88	3,398.85	54.13%	1.62%
DEM	AMD	A3	BOSP	BOSCH SPARK PLUGS	22,713.46	12,044.59	10,668.87	46.97%	5.85%
DEM	AMD	A3	BOSW	BOSCH WIPER BLADES	27,757.21	14,864.38	12,892.83	46.45%	7.15%
DEM	AMD	A4	BOSA	BOSCH ALTERNATORS	77,084.31	52,921.03	24,163.28	31.35%	19.87%
DEM	AMD	A4	BOSE	BOSCH ELECTRICAL	60,112.34	35,024.42	25,087.92	41.74%	15.50%
DEM	AMD	A4	BOSS	BOSCH STARTERS	157,838.36	107,167.38	50,670.98	32.10%	40.69%
DEM	AMD	MI	LAB	LABOR	4.50	2.81	1.69	37.49%	0.00%
DEM	AMD	SS	KIMP	PAPER PRODUCTS	1,144.50	641.76	502.74	43.93%	0.30%
DEM	AMD	XX	DIXL	DIXIE ALTERNATORS	4,550.10	3,179.73	1,370.37	30.12%	1.17%
DEM	AMD	ZZ	09	09 NCA EST	454.20	328.25	125.95	27.73%	0.12%
DEM	AMD	ZZ	40	40 NCA TEST	-500.40	-333.60	-166.80	-33.33%	-0.13%
DEM	AMD	ZZ	43	43 NCA TEST	-1.26	-1.08	-0.18	-14.29%	0.00%
TOTALS:					387,943.83	247,976.23	139,967.61	36.08%	

Sales by Product Group/Line: JAN 1,2011 to DEC 31,2011

Once you drill into a product line, you'll see sales within that product line broken down by customer.

Sales for Product Group/Line: A3: BOSF - FROM: JAN 1,2011 to DEC 31,2011

Com	Brn	Line Description	Customer	Cus. No	Sales	Costs	Gross Profit	Margin	SLS%
DEM	AMD	BOSCH FILTERS	CRANE CARRIER COMPANY	23	1,558.48	971.91	586.57	37.64%	13.98%
DEM	AMD	BOSCH FILTERS	CRISWEL TRANSMISSION	45	1,554.01	957.78	596.23	38.37%	13.94%
DEM	AMD	BOSCH FILTERS	DAVE ROSS TRUCKING	221850	1,401.15	868.82	532.34	37.99%	12.57%
DEM	AMD	BOSCH FILTERS	L&D PETCH CONTRACTING LTD.	199000	1,558.77	954.76	604.01	38.75%	13.99%
DEM	AMD	BOSCH FILTERS	NORTHWESTERN CONTRACTING LTD.	255750	1,591.08	930.95	660.13	41.49%	14.28%
DEM	AMD	BOSCH FILTERS	RAFT RIVER ENTERPRISES LTD	213000	1,670.97	1,027.35	643.62	38.52%	14.99%
DEM	AMD	BOSCH FILTERS	ROBERT ARREL	11065	1,810.44	1,117.05	693.39	38.30%	16.24%

Drilling into the customer will show you the parts they purchased within the product line you selected at level 1.

CRM Reports

CRM Reports

The CRM Reports allow you to view your sales (YTD) versus your sales goals, as well as see what different opportunities you current have and what phases those opportunities are in.

The CRM Reports do not use the dashboard dates.

The following lists (reports) are available; most have drill down capabilities.

CRM - Customer Sales vs. Goals

CRM - Customer Sales vs. Goals

Sales by Customer YTD vs. Goals

Drill downs

  Customer -> Salesperson -> Product Line

CRM - Product Sales vs. Goals

CRM - Product Sales vs. Goals

Sales by Product Group YTD vs. Goals

Drill downs

From Product Group -> Product Line -> Salesperson

CRM - Salesman Sales vs. Goals

CRM - Salesman Sales vs. Goals

Sales by Salesman YTD vs. Goals

Drill downs

From Salesman -> Customers -> Product Lines

CRM - New Account Sales vs. Goals

CRM - New Account Sales vs. Goals

Shows Sales by Salesperson YTD vs. New Account Goals

Opportunities by Phase

Opportunities by Phase

Lists opportunities by Phase with three additional levels of drill down
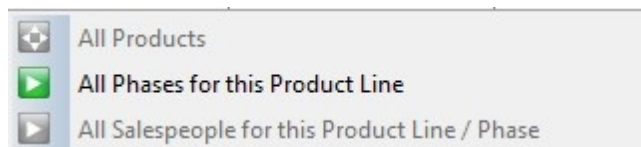
Drill Down Levels:

All Pipeline Phases
All Sales People in this Phase
All Customers for this Salesperson
All Product Lines for this Customers
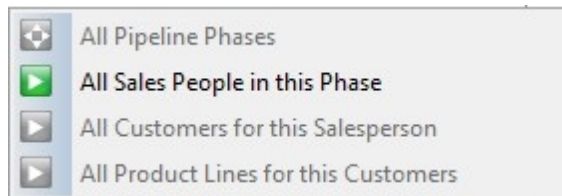
Opportunities by Product

Opportunities by Product

List Opportunities by Product Line with two additional levels of drill down

Drill Down Levels:

All Products
All Phases for this Product Line
All Salespeople for this Product Line / Phase

Opportunities by Salesman

Opportunities by Salesman

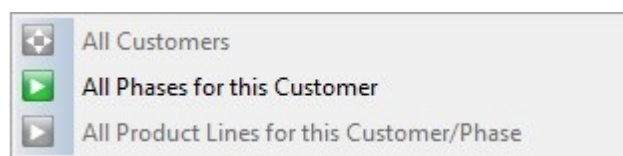List Opportunities by Salesman with two additional levels of drill down
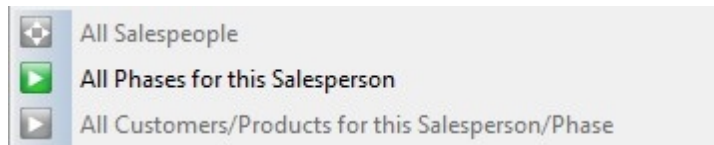
Drill Down Levels:

Opportunities by Customer

Opportunities by Customer

List Opportunities by Customer with two additional levels of drill down
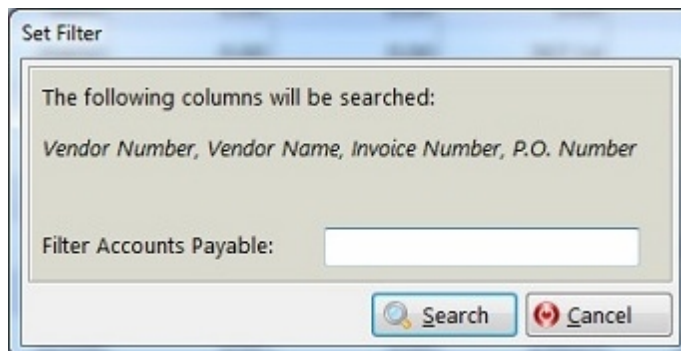
Drill Down Levels:

Filtering your lists

In E360; there is a standardized "Filter" hot key. That key is "CTRL-F". The filter applies to lists only; so your A/R, or A/P list, or the inventory, or any of the sales or purchasing lists.

When you press "CTRL-F" a window pops up and asks you for a search phrase.

As you can see; the columns that will be search are listed, and the name of the list also appears (in this case; it's the Accounts Payable list).

Fill in your search phrase and click the "Search" button. The window will close and your list will be filtered

You will also see a message underneath your list; that tells you the following:

If the list is not being filtered; the showing the following:

** SOME IMPORTANT THINGS TO NOTE **

When you do this secondary filtering; you are filtering what could be an already filtered list.

Please be aware that your totals may not change, as they are based on the results of the original filter. This filter is designed to simply help you find records in your list.