

BPO INSIGHT

CEO DASHBOARD

Introduction

This dashboard shows 4 graphs related to high level details often required by managers.

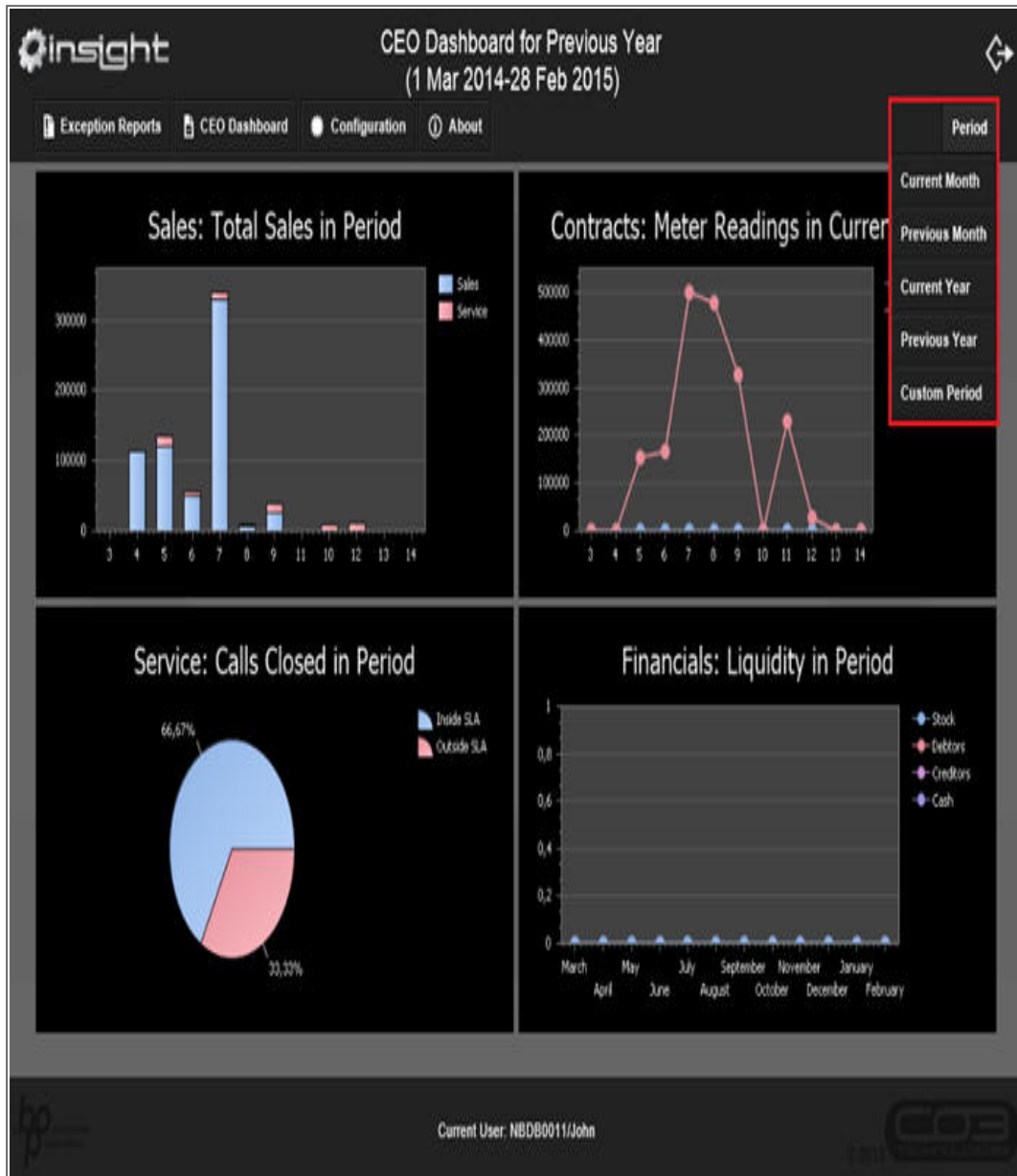
Ribbon Access: *BPO Insight > Configuration*

- Click on the 'CEO Dashboard' link.
- Give the screen a moment to calculate the charts.



- Click on the 'Period' button and select the option to want to view, from:
 - Current Month
 - Previous Month
 - Current Year

- Previous Year
- Custom Period



- To pull a more specific chart / view the report data - click on the report you want to view.



- The Report will open, showing you the date range from the period selected above.
- The 'Chart' tab is selected by default.
- You can update the Chart Setup, Sorting and Filters - then click on 'Go'

insight Sales: Period Summary

Exception Reports | CEO Dashboard | Configuration | About | Email | -- Export Data -- | Go

Sales: Period Summary
Sales in Period

Data Parameters
Start Date: 2014-03-01
End Date: 2015-02-28
Timestamp: 2015-07-08 02:58:14 PM

Chart | Data

Chart Settings

Setup
Chart type: Bar Chart
Field: ChartIntervalName
Value: ChartIntervalName
Function: SUM
Aggregate function to apply to Value field data

Sorting
Sort by: [Dropdown]
Sort Order: [Dropdown]

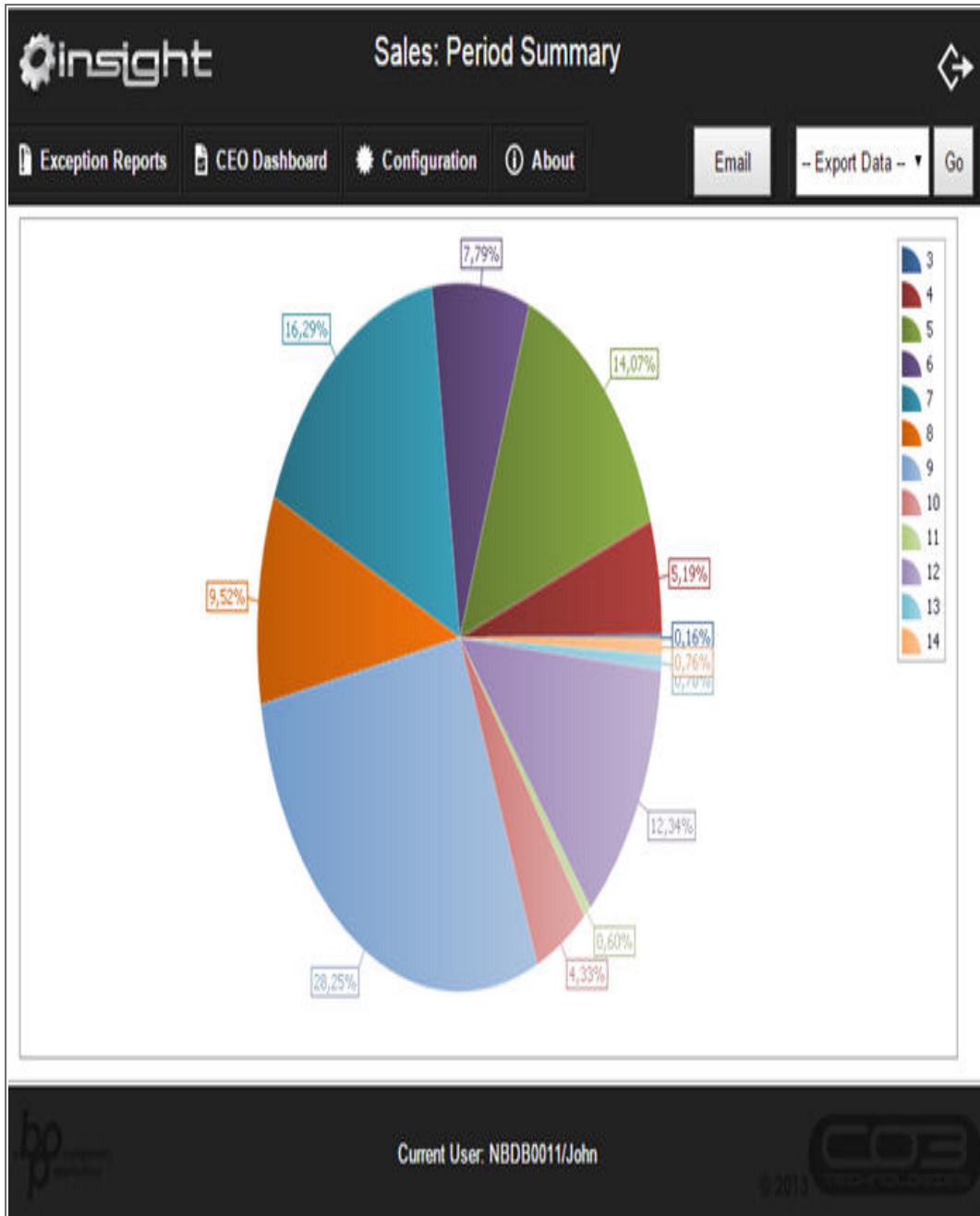
Filters
Filter Field: None
Filter Value: [Dropdown]

Go

550

Current User: NBDB0011/John | © 2013

- The chart will populate based on your selection.



- Click on the 'Data' tab to view the report data
- View / group / filter as required.
- You can email or export the report in the same way as the exception reports.

- [Email the Report](#)
- [Export the Report](#)

Sales: Period Summary

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Sales: Period Summary

Sales in Period

Data Parameters

Start Date:

End Date:

Timestamp: 2015-07-08 02:58:14 PM

Chart
Data

Drag a column header here to group by that column

Chart Interval Name	Employee Name	Document No	Doc Status	Doc Type	Document Date	Document Month	Document Year	Site Name
3					1900-01-01	0	0	
4	Belinda Sharman	INV0000001	P	Parts Invoice	2014-04-03	4	2014	Durban
4	Belinda Sharman	INV0000002	P	Parts Invoice	2014-04-03	4	2014	Durban
4	Belinda Sharman	INV0000003	P	Parts Invoice	2014-04-03	4	2014	Durban
4	Belinda Sharman	INV0000004	P	Parts Invoice	2014-04-04	4	2014	Durban
4	Belinda Sharman	INV0000005	P	Parts Invoice	2014-04-07	4	2014	Durban
4	Belinda Sharman	INV0000006	P	Parts Invoice	2014-04-07	4	2014	Durban

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