

Dashboards & Reports

Listing overview

Introduction

Introduction

This Quick guide will show you how to Add and edit a listing overview in the dashboard or report. The data that needs to be filled in is; customers, products, and time. In the end you have setup a listing overview in dashboard.

Quick guide concept

Through a number of easy steps you learn how to use the software.

Each step is numbered and defines a phase. Each phase contains a short description and an illustration to show how to navigate or operate in the software. The guide ends with a Q&A.



The guide *may* contain important general notices. These will be marked with an exclamation icon.



Tips and tricks are marked with an Info-icon.



Questions & Answers note relevant to the topic at hand.

1 Add element

Open My dashboard in ribbon. A new tab opens. Click Edit layout and choose Add Element. A window opens. Click Listing overview.

This functions the same way in my dashboard as in shared dashboard and any report.



You should start experiment adding elements in my dashboard, and when you feel comfortable you can start setting up the shared dashboard. In this way, the shared dashboard will not be edited by several employees.

2 Configure the Listing overview

The listing overview is set up with a product overview to the left and an overview of the customer(s) in the top. The products are checked at the customers they are sold to.

You can set up the listing overview for different customers, periods, brands etc. You can also select the value(s) you want for the different brands by customers.

This will be explained later in this guide.

3 Placing elements

When you have added elements you need to figure out where to place the element on the dashboard.

The first element you add will automatically fill the working area.

The second will appear in a pop-up window next to the cursor on the screen.

Click the element to move it. A docking assistant appears on the screen where you can dock the element in the appropriate position.

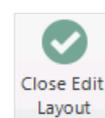
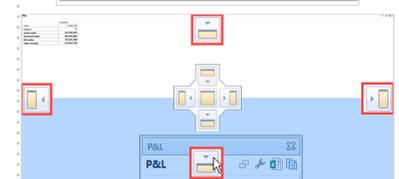
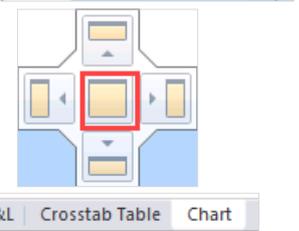
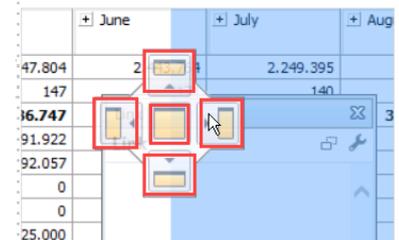
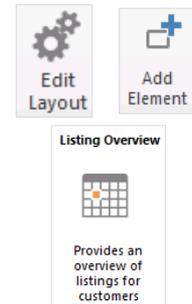
Drag the element to one of the five docking areas (highlighted in red) to dock the window in the middle of the screen. Each docking area indicates the position of the element after it has been docked. The area in blue indicates where the element will be docked.

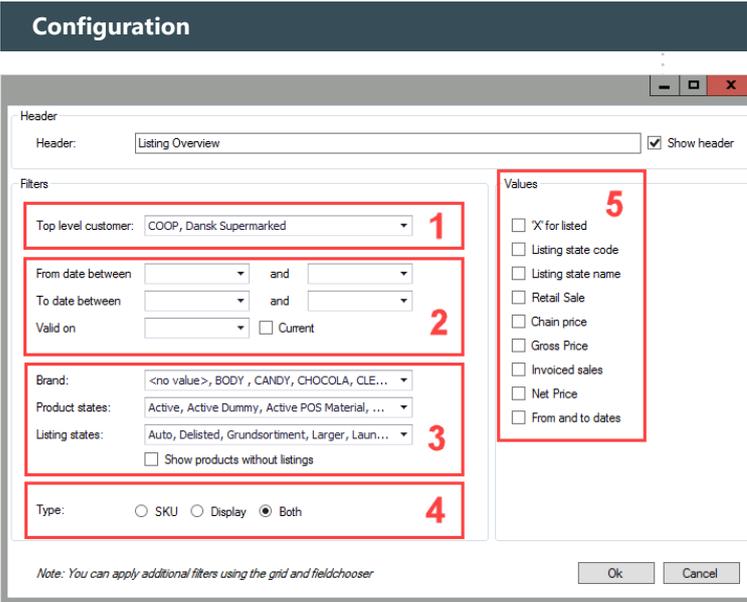
If you place the element in the middle docking area of an existing element (second picture), the window will be placed in another tab than the first one. This creates different tabs in the bottom of the first tab (third picture).

The docking area in the outer edges (fourth picture) of the tab places the element in the outer edges. If you place the element in the bottom of the tab, and then remove the first element, the second element will remain in the bottom of the tab.

4 Save layout

Click Close edit layout in the ribbon to save your new layout.





Above you see the window that appears when you add a Listing overview. Here is a description of the different marked points.

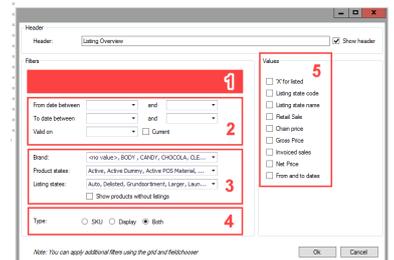
1. Here you select the top level customer you want the listing to show. BMS will automatically display the banner level customers belonging to the top level customers.
2. Select the period you want the listing to be displayed in.
3. Here you select the Brand(s), Product states and Listing states you want to display in the table.
4. Select if you want the overview on SKU, Display or both.
5. Here you can check the value(s) you want to be displayed for every product belonging to the customer. If you do not check any values, BMS will make a cross in the fields instead.

Setup Listing overview

Products					COOP		Kvicky		Superbrugsen		Dansk Supermarked		Dansk Supermarked		Fotex	
Brand	Sub brand	Item Number	Product	EAN Code	COOP	COOP					Bika					
HAIR		1000	HAIR Shampoo Normal	5123657895423	X		X		X				X		X	
HAIR		1001	HAIR Shampoo Colored	5123657895424	X		X		X				X		X	
HAIR		1002	HAIR Shampoo Sherry	5123657895425	X		X		X				X		X	
HAIR		1003	HAIR Shampoo Dry	5123657895426			X		X				X		X	
CLEAN		1004	CLEAN Soap 2L	5123657895427	X		X		X		X		X		X	
SOFT Drink		1005	SOFT Drink 750ml	5123657895428	X		X		X		X		X		X	
MUTARDE		1006	FORTE Mutarde	5123657895429	X		X		X		X		X		X	
TOMATO	Original	1007	TOMATO Ketchup 500 ml	5123657895430			X		X		X		X		X	
TOMATO	Original	1010	TOMATO Ketchup 750 ml	5123657895433			X		X		X		X		X	
TOMATO	Original	1013	TOMATO Ketchup 750ML ECO	5123657895436			X		X		X		X		X	
TOMATO	Original	1014	TOMATO Ketchup	5123657895437			X		X		X		X		X	
TOMATO	Original	1015	TOMATO Ketchup display	5123657895438	X		X		X		X		X		X	
TOMATO	Original	1016	TOMATO Ketchup display	5123657895439	X		X		X		X		X		X	
WASH Pow...		1019	WASH Powder	5123657895442	X		X		X		X		X		X	
LIQUID		1020	LIQUID Cleaner 750ml	5123657895443	X		X		X		X		X		X	
LIQUID		1021	LIQUID Cleaner Lemon 750 ml	5123657895444	X		X		X		X		X		X	
LIQUID		1022	LIQUID Cleaner Home 750 ml x	5123657895445	X		X		X		X		X		X	
LIQUID		1023	LIQUID Cleaner WC 750 ml	5123657895446	X		X		X		X		X		X	
LIQUID		1024	LIQUID Cleaner Universal 1500ml	5123657895447	X		X		X		X		X		X	
LIQUID		1025	LIQUID Cleaner display 60 units	5123657895448	X		X		X		X		X		X	
LIQUID		1026	LIQUID Cleaner spray 2 x 500 ml	5123657895449	X		X		X		X		X		X	
LIQUID		1029	LIQUID Cleaner NEW! Lemon 750 ml	5123657895452	X		X		X		X		X		X	
BODY	Alpha	1030	BODY Gel Hydrating	5123657895453			X		X		X		X		X	
BODY		1031	BODY Gel Revitalising	5123657895454			X		X		X		X		X	
BODY		1032	BODY Gel Toning	5123657895455			X		X		X		X		X	
BODY		1033	BODY Gel Active for Men	5123657895456			X		X		X		X		X	
BODY		1034	BODY Gel Invigorating	5123657895457			X		X		X		X		X	
BODY		1035	BODY Gel mix kasse m. 4 var.	5123657895458			X		X		X		X		X	
BODY		1036	BODY Milk & Honey	5123657895459			X		X		X		X		X	
BODY		1037	BODY Gel Sensitive	5123657895460	X		X		X		X		X		X	
BODY		1038	BODY Gel Dusch & Creme Normal	5123657895461	X		X		X		X		X		X	
BODY		1039	BODY Natural Milk Extracts	5123657895462	X		X		X		X		X		X	
BODY		1040	BODY Gel Essential Oil	5123657895463			X		X		X		X		X	

1 Select top level customer(s)

Select the top level customer you want in your Listing overview. (Configure number 1).



2 Select period

Select the period you want your overview to be displayed in. You can either select a from and to date, a specific date or select current. (Configure number 2).

3 Select products

Here you check the brands in the drop-down list you want to be displayed in the left columns of the overview table. You can also check the product states and listing states. (Configure number 3).

4 Select type

In Type, check the type you want to be displayed. (Configure number 4).

i Check values

You can choose to check values to the overview table instead of the 'X's. You can check more values if you want. (Configure number 5).

