

Dashboards

Overview

Dashboards allow you to put pertinent data at your fingertips in an intuitive, graphical display. Each **Dashboard** consists of one or more tiles and each tile can be setup to display different data. The data displayed can be based on specific associates or all associates.

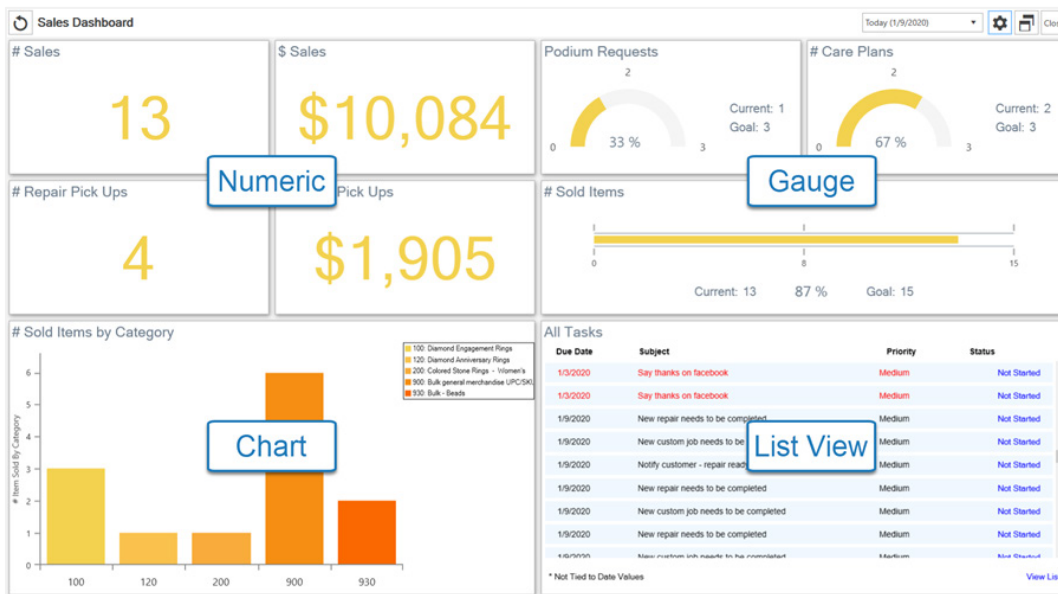
There are four types of **Dashboard** tiles:

Numeric Displays a single number; recommended for use on 1 by 1 tiles.

Gauge Displays a gauge where you can set a goal; recommended for use on 1 by 1 and 1 by 2 tiles.

Chart Displays a pie, bar, or doughnut chart; recommended for use on 2 by 2 tiles.

List View Displays a list of actionable records; recommended for use on 2 by 2 tiles.



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Creating Dashboards

To create a new **Dashboard**:

1. Click **Dashboards > Add**.

Dashboard Configuration

This Item is a Dashboard

Button Text

Dashboard Title

Button Color

Dashboard Associate

Associates that can View

Copy Dashboard From

Button Text Label for the button; each Dashboard will show as its own button in the menu.

Dashboard Title Title that displays at top of Dashboard.

Button Color Color for this Dashboard's button.

Dashboard Associate Associate(s) that this Dashboard's data is based on.

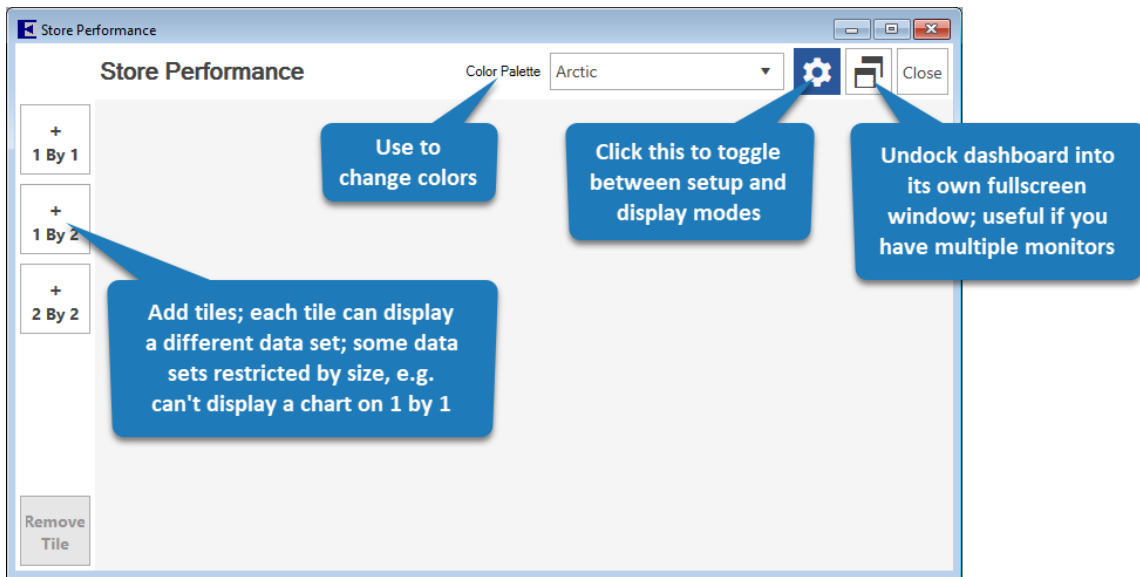
Associates that can View Associate(s) that have permission to view this Dashboard.

Copy Dashboard From Copy initial Dashboard setup from an existing one.

2. All fields, with the exception of **Copy Dashboard From**, are required. Fill them in and click **OK**. The **Dashboard Management** window will appear.
3. This window controls the positioning of the buttons in the hierarchy. See the **Organizing** section of this document for more information. For now, click **Save/Close** in the lower right.
4. Your **Dashboard** button will appear on the left.



5. Click on the button you just created. The blank dashboard will load.



6. Click **2 by 2** to create your first tile, then click the **Gear** icon on the tile to enter setup.

The 'Dashboard Tile Setup' dialog box is shown. It has a title bar 'Dashboard Tile Setup' and a main title 'Tile Setup'. Below the title is a 'Tile Title' text input field. Underneath is an 'Instructions' section with a list of four steps: 1. Start by selecting the type of Dashboard element you would like to add. 2. Select the type of data you would like to display. 3. Select the data point you would like to display. 4. Some Dashboard elements may have other configuration options. On the left side, there is a vertical menu with icons and labels: 'Instruct' (list icon), 'Numeric' (hash icon), 'Gauge' (gauge icon), and 'Chart' (bar chart icon). At the bottom right, there are 'Save' and 'Cancel' buttons.

7. There are four types of Dashboards:

Numeric Displays a number; recommended for use on 1 by 1 tiles

Gauge Creates a gauge with goals; useful for tracking progress

Chart Displays a pie, bar, or doughnut chart; best used with 2 by 2 tiles

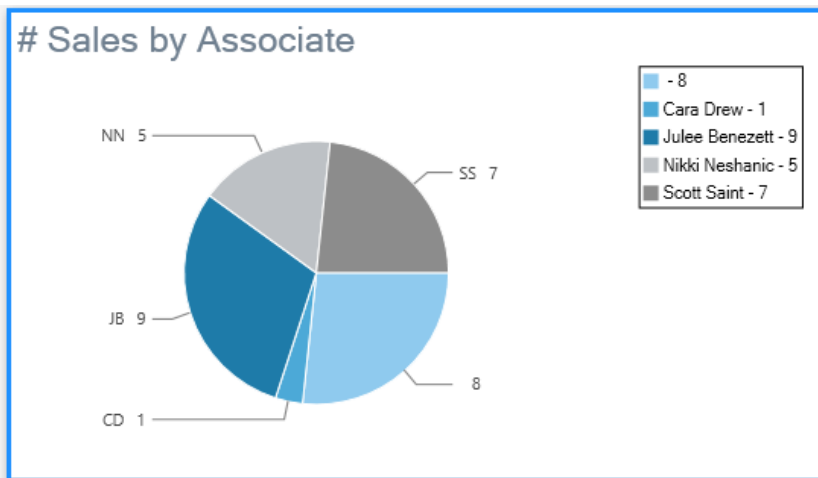
List View Displays a list of actionable records such as tasks, customers, appointments, etc.

8. For this example, click on **Chart**.
9. Use the drop-downs to select:

- a. **Data Set:** Sales Data
- b. **Data Value to Display:** # Sales by Associate
- c. **Chart Type:** Pie Chart

10. The **Tile Title** will automatically fill in to match selected data, but you can change it if you like.

11. Click **Save** to add this tile.



12. Repeat to add as many additional tiles as you like.

13. If you make a mistake or want to delete a tile, use the **Remove Tile** button.

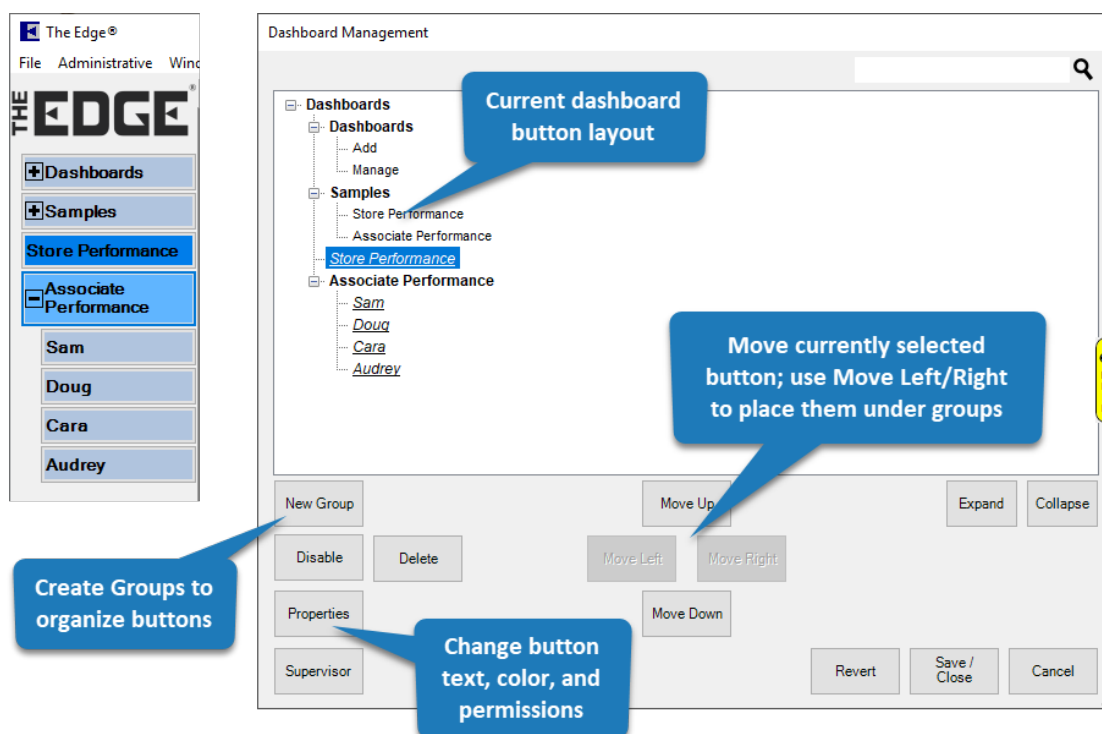
14. When done, click the **Gear** icon in the top right to toggle out of configuration mode.

Working with Dashboards

Organizing

When creating new **Dashboards**, each will show up as a button on the left. You can use **Dashboard Management** to change the order, and grouping, of these buttons. To do so:

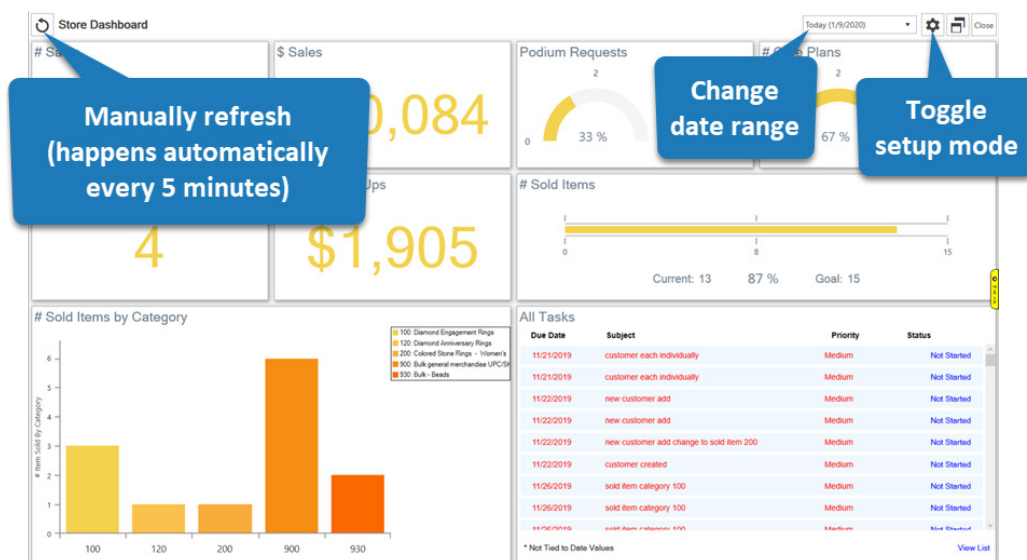
1. Click **Dashboards > Manage**. The **Dashboard Management** window will appear.



2. This window will reflect the current button layout. Each time you create a new Dashboard, it will show up at the bottom of the list.
3. To change the button order, select the button and use **Move Up / Move Down**.
4. To group buttons, first click **New Group** and enter text to display. Then use **Move Up / Down** to position it. Finally, to place buttons in the group, move them under it and use **Move Right**.
5. When finished click **Save/Close** to save the menu structure.

Viewing

To view a **Dashboard**, click its corresponding button in The Edge menu.



Editing

To change the button text, button color, dashboard title, or associates for an existing **Dashboard**:

1. Click **Dashboards > Manage**. The **Dashboard Management** window will appear.
2. Select your **Dashboard**, then click the **Properties** button.
3. Make desired changes, then click **OK**.
4. Click **Save/Close** to save your changes.

To change a **Dashboard** tile:

1. Click on the **Dashboard** to open it.
2. Click the **Gear** icon in the top right to enter setup mode.
3. Click on the tile you wish to edit, then click on its gear icon.
4. Make desired changes, then click **Save**.



NOTE: When changing the data displayed on a tile be sure to update the tile's **Title**.

Deleting

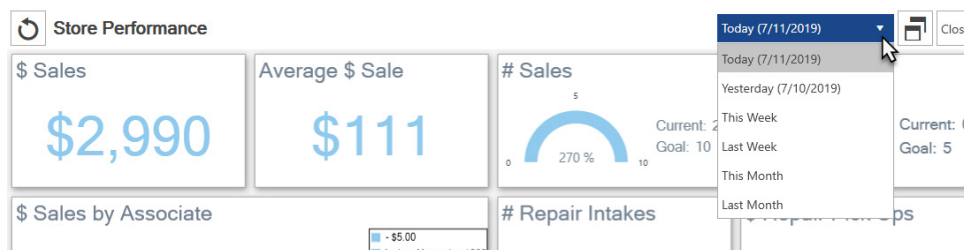
To delete an existing **Dashboard**:

1. Click **Dashboards > Manage**. The **Dashboard Management** window will appear.
2. Select your **Dashboard**, then click the **Delete** button.
3. Click **Save/Close** to save your changes.

Frequently Asked Questions

Q: What date range is the data based on? Do I get to choose specific dates?

A: Dashboards give you the option to display data from **Today**, **Yesterday**, **This Week**, **Last Week**, **This Month**, or **Last Month**. There is a drop-down date selector at the top right.



NOTE: The date selector is not available when you have setup mode (gear icon) toggled on.

Q: What is the sales data based on? Do sales figures include services?

A: Services are not counted in any dollar figures (e.g. \$ Sales, \$ Profit) until they are finished and picked up. The only exception to this is Total \$ Tender which will always show all money taken in regardless of transaction type.

Service transactions do count towards number of sales each step of the way, so doing a repair intake, then a payment, then a pick up would result in 3 sales, but would not be reflect on \$ Sales until pick up.

Data values containing the word 'Sales' include all transaction types. Data values containing the words 'Sold Item' specifically look at items and do not count services, miscellaneous charges, or other transaction types.

Q: How often does the Dashboard refresh?

A: The Dashboard automatically refreshes every 5 minutes. You can manually refresh at any time using the Refresh icon on the top left. Note this icon is not visible if your dashboard is still in configuration mode.

Q: Can I move Dashboard tiles once they are created?

A: Not at this time; you can though change the data presented or remove and re-add tiles.

Q: Will you be adding more data types and choices?

A: Yes we plan to continue to add more data. If you have a suggestion for something you would like to see please email it into Support@ajsllc.com. We also have plans to add additional tile sizes and types.