

## Spotlight - SERP - KPIs

Preparation if using demo data attached

1. Import Demo Data

2. Login with

Standard ID: sample@hansaworld.com

Passworld: Sample99

3. Create Receipt

Create a new receipt in current month, so that the figure for Receipts shows a trend.

4. Login Details for KS

Standard ID: test@hansaworld.com

Password: Sample99

Preparation for creating your own demo data

1. Import UK Sample Data

2. Make sure KPI's are activated

Module>>System>>Setting>>Configuration>>Basics>>KPI's

3. Setup KPI's

Module>>System>>Settings>>KPI

(Refer to Manual for setting up KPI's)

Setup different KPIs for SJ and KS respectively – check in the script which ones to choose.

4. Second User

Make sure you have login details for KS (or another user of your choice) setup

5. Create new data, if needed

Enter several receipts, quotations, invoices

As a manager, it is important to have all critical information at your fingertips to make immediate and accurate decisions. Instant visibility of business performance helps decision makers stay informed and saves time and money.

Using the KPIs feature in Standard ERP you will be able to access that information directly in Home.

For example, as the chief accountant, you can easily see the total value of overdue invoices from the KPIs defined, on this area of the Home screen.

ACTION: Show cursor on first KPI – SL Due

You can immediately see that the receivable value has gone down this month, which is a good thing, but the value still seems on the high side. You can select Receivables to get more info

ACTION: Open the Sales Ledger report from the KPI list

Now you can quickly spot those large invoices that the team needs to deal with on an urgent basis;

ACTION: Scroll up and down on the Sales Ledger report, and open an invoice on the report

In just one click you are able to make critical decisions because the information you need is instantly visible.

ACTION: Select the Key Icon on the Navigation Centre

Let's log in as the sales manager

ACTION: Standard ID: test@hansaworld.com, Password: Sample99

You can now visually see that both the GP and number of quotes has gone up and the pipeline is looking very nice for this month.

ACTION: Move Cursor over Quotations and Pipeline Names

You can again drill down on the pipeline to get more details and focus on the more important quotations with higher probability.

ACTION: Select Pipeline from the KPI's, scroll down and up, and open Quotation 21100022

Key Performance Indicators are an Integral part of any business. Get instant insight into how your business is performing with this functionality in Standard ERP.