

Smart views & dashboards

:: a business white paper ::



Background - Progressive Solutions and bisTrack

Progressive Solutions develops and supplies bisTrack business software primarily to distribution companies serving the construction industry. bisTrack was originally developed for use by companies that supply, import and process timber. Because of its strong timber related functionality, it is still widely used throughout this sector as well as by builders' merchants, steel stockholders, plumbers' merchants and electrical wholesalers.

The standard bisTrack package is used to process sales, manage stock, simplify purchasing and gather intelligence. However for greater functionality, additional bisTrack modules have also been developed and these include Web Track for companies who wish to offer internet based trading, bisTrack Mobile which enables staff to access the software remotely and eBusiness for paperless trading.

bisTrack software is built using Microsoft architecture and is therefore easily integrated with existing software. Because of this, modules are now being developed for wider use throughout the construction industry to complement incumbent systems. Specifically, 'bolt on' modules which enhance data mining and electronic trading and document tracking are helping to deliver projects on time and within budget.



Progressive Solutions International Limited
The Heath Business & Technical Park
Runcorn, Cheshire WA7 4QX
United Kingdom

Tel: +44 (0)1928 592200
Fax: +44 (0)1928 592252

www.progressive-solutions.co.uk
Last revised: 13 January 2010



Objective

This white paper takes the form of a simplified technology briefing, supported by case study examples, to communicate the functionality and business value of the standard and customisable Dashboards and Smart Views within bisTrack, for all companies involved in the distribution of materials to the construction industry.

The value of business intelligence

The monetary value of a toolset which provides reliable, current information about your business in a way that helps you make better decisions, improve revenue generation and reduce costs will depend upon the size of your operation and the extent to which you use it. However when this type of information is presented in a way which gives you an advantage over your competitors or identifies potentially business threatening credit hazards, the value is incalculable.

The ingredients needed to produce such intelligence are there for the taking – in the form of the data collected as a by-product of your company's everyday trading. The value is added when the data is gathered, managed and presented in such a way as to provide you with clear visibility of what is most important, to help you identify trends and opportunities and to empower you with the knowledge to help you make and implement the right decisions.

bisTrack's standard Dashboards are not only designed to empower management by the provision of information upon which strategic decisions can be made; they are also designed or can be customised for use by specific team members such as trade counter staff, credit control staff, warehouse managers and back office sales departments. The levels of permission ensure for example that counter staff just see how many orders are awaiting processing plus any messages, whilst branch managers or senior managers see margins being made and other behind the scenes KPIs.

The dashboards

A dashboard is simply a method of displaying a collection of live, key performance indicators (KPIs) on your screen, in a way that can be instantly understood and acted upon. Some of bisTrack's standard dashboards are listed below, but can be modified by the inclusion of customised Smart Views which present the KPIs which are most relevant to you and the way your company operates.

Credit control – company dashboard

This is a key dashboard for any company and displays standard Smart Views showing outstanding balances by value, by branch and by customer. All the information can be analysed in more detail by simply drilling down into the individual Smart Views. The illustration below shows how a detailed listing of all debts outstanding to a particular branch can be accessed simply by double clicking on the Runcorn branch section of the overdue balances by branch view. Once you have drilled down, you can then sort the detailed information by code, customer name, amount etc, using bisTrack's standard 'Find' and 'Sort' commands.

Credit Control - Company

Aged Balances (with drilldown)

Period	Value
0 Month	£57.42766K
1 Month	£331.25007K
2 Month	£92.22289K
3 Month	£14.10027K
4 Month	£-1.00345K
5 Month	£8.43019K
6 Months +	£60.18722K

Overdue (2 mnths +) by Customer Home Branch (with drilldown)

Branch	Value
Runcorn	£60.11K
Liverpool	£105.6K
Chester	£4.92K
Manchester	£1.49K
Net Set	£1.79K
Warrington	£24.92

Total Debt by Customer Home Branch

Customers Over Limit

Over Credit Limit by Customer

Overdue (2 mnths +) by Customer - Top 100

Customer	Balance	Credit Limit	Amount Over Limit	On Hold
H Peterson & Company Carpentry	2545.37	2000	545.37	False
Taylorod	2320.58	2000	320.58	False
Linewad (Timber Suppliers) Ltd	1162.09	1000	162.09	False
Stonegate Heating PLC	1610.3	1500	110.3	False

Customer	Total OverDue	Total Balance	Credit Limit	On Hold
Manuel	14676.98	15388.59	20000	False
SDE (Steel Stockholders)	9538.28	9538.28	15000	False
Colin Sawmills	9487.68	10541.24	50000	False
TA King Shopfittings	8938.78	8938.78	10000	False
Byam Trust (Heating & Plumbing) PLC	8188.33	16787.67	40000	False
Village (Plywood) PLC	7681.61	15913.19	30000	False
A Brand (Carpentry) PLC	6370.46	6370.46	6000	False
NJB Estates	5682.51	5874.67	10000	False
Peter Plumbing	5529.81	9719.09	15000	False
Howlett Services	5403.68	5403.68	10000	False
D Simpson Plumbing & Drainage Ltd	4661.3	7726.15	20000	False
Turnstone Timber	4258.52	4258.52	6000	False
AT Saunders and Son Carpentry & Joi...	3921.77	6316.15	15000	False
Kenneth (Builders)	3882.02	4010.87	5000	False

Company Summary

Credit control – branch dashboard – for branch managers

Designed for use by the branch manager, this view shows aged balances, customers over credit limit, top 10 customers by overdue balance and overdue balance by sales rep. Users can drill down into the detail of each debt.

Quotation tracking by branch -manager/supervisor view/individual operator view

This dashboard breaks down the quotation raised at a specific branch, and shows the number raised by each person, their values and tracks those accepted or rejected. It's then possible to drill down to analyse the detail of each quote. The "my quotes" dashboard gives a breakdown of what happens to each quotation by operator.

Quotation tracking – failure/rejection analysis

This view allows users to drill down and analyse why business is being lost, by individual operator or by reason code.



Sales analysis/Customer sales

Accurate and detailed sales analysis and customer data is the only effective basis on which to plan future marketing activity, prepare sales forecasts and ensure profitable key accounts are retained.

bisTrack's sales analysis dashboard could show you, for example, your top 10 customers by value and by profit, (with the exact margin shown in each case.) Or, drill down into the customer sales dashboard to see everything you need to know about an individual customer in one view; compare this year with last, see the products they buy most frequently and see which products are earning you most profit. A management view lets you analyse sales by company or branch - so you can check the contribution each branch makes to your total sales and profits over time.

Branch stock dashboard – simple valuation and products not selling

This dashboard lets you check details of slow moving stock, you can see the value of that stock and the date of the last sale. You can also analyse products which are not moving at all using Smart Views such as 'Items by Value not issued in 6 (or 12) months'.

Simple supplier OTIF (on time in full) and purchase analysis

The purchase analysis dashboard shows you the ability of your suppliers to deliver on time and in full, helping you monitor and improve their performance.

Smart Views

bisTrack Smart Views are a customisable feature within bisTrack software which enable individuals or groups of users to view a snapshot, in tabular format, of pertinent live data held within the system. Certain pre-defined views are presented as the standard dashboards above, but it's easy for users to build their own, even with no programming experience.

Case study examples:

One bisTrack user (a timber company with a dozen branches) has produced around 500 Smart Views which are used by a variety of staff within the organisation. Time is saved by the staff not having to go to separate sources within the system to find the information they require.

The company's Business Analyst created a Smart View to quickly source the data he needs for the OTIF reports he has to provide for national account customers. Another provides a report for customers who want to see what materials have been delivered to particular sub contractors, on particular sites along with the appropriate PEFC or FSC certification. The smart view data can be simply exported into Excel and mailed to the customer as required. The same analyst also uses a Smart View which monitors the number of orders which are received via the company's EDI system; another monitors how often customers are using their bisTrack Web Track portal to manage their accounts.

The same company's Group Auditor uses around 20 Smart Views regularly for monthly system audits. These views include high and low margin reports, negative stock items and products without a cost. The Auditor says he has cut reporting time in half by being able to access the data he needs through a Smart View. Previously he had to source data from separate parts of the system and export it into Excel. A further benefit is that the Smart View data he sees is live. Smart Views can be produced for 'one off' reporting. When the transport packing team alerted the Data Manager that some products in bisTrack didn't show weights and sizes, a Smart View was created to show how many products were missing this information which Product Controllers used to address the problem and add the information into bisTrack.

It is also possible to use bisTrack's Smart Views to present information imported from other systems. The timber company's Financial Systems Developer created a view for the finance department which enables very specific information held in the company's accounting system, Dynamics GP, to be presented in a graphical format. The two systems already 'talk' to each other as bisTrack sends invoices to GP and GP sends the customers balances back to bisTrack. But some information, such as statistics, are not held easily in bisTrack so 'stored procedures' have been developed which enable the information to be imported.

How easy is it to create a Smart View?

New Smart Views can be quickly created within bisTrack using the 'New Smart View' screen. The user simply chooses the data required from within the system and copies it into the new view. Criteria can be amended as required. After previewing, the Smart View can then be saved and referred to as and when required, within bisTrack, and the data will always be live. Alternatively, the Smart View data can be exported into Excel for further manipulation or for emailing to third parties.

Conclusion

As our examples above show, and existing bisTrack users confirm, Smart Views and Dashboards provide companies with a fast and convenient way of interpreting the data held within the bisTrack system for greatly enhanced reporting, forecasting and business analysis.

"Because of lack of information, processes and tools, more than 35% of the top 5,000 global companies will regularly fail to make insightful decisions about significant changes in their business and markets."

Gartner Report 2009