

## Prextra documentation



# Prextra

ERP Solution Adapted to your Operations

## **Dashboards**

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# Dashboards

New dashboards are now available.

These dashboards will allow you to visualize various pieces of information in one place.

Please refer to this document for details on the different available dashboards.

Furthermore, it is now possible to design your own dashboards.

You can also design a dashboard based on an existing one, allowing you to copy it and make desired modifications.

To do so, please refer to the "[Dashboard Designer](#)" documentation in the "General Help" module.

To view one or more dashboards, go to the "My Dashboards" option in the "Management" menu of the "Options-User" module.

It is also possible to display the dashboards when you log in to Prextra by selecting "BI Dashboard" in the "Home Page" field of your user preferences.

This way, your authorized dashboards will be displayed when you log in to Prextra.

The screenshot shows the 'Preferences' dialog box with the following settings:

- Language: English
- Date format: DD/MM/YYYY
- CRM Calendar: 60 Minutes
- Menu Location: Top - collapsed
- Start of work day: 0.00
- E-mail types: Gmail
- Open Gmail:
- Home page: BI Dashboards

**Default view**

- Personalized
- Show column filters
- Show header filters
- Show advanced filters
- Show groups
- Infinite scrolling

Number of lines: 50

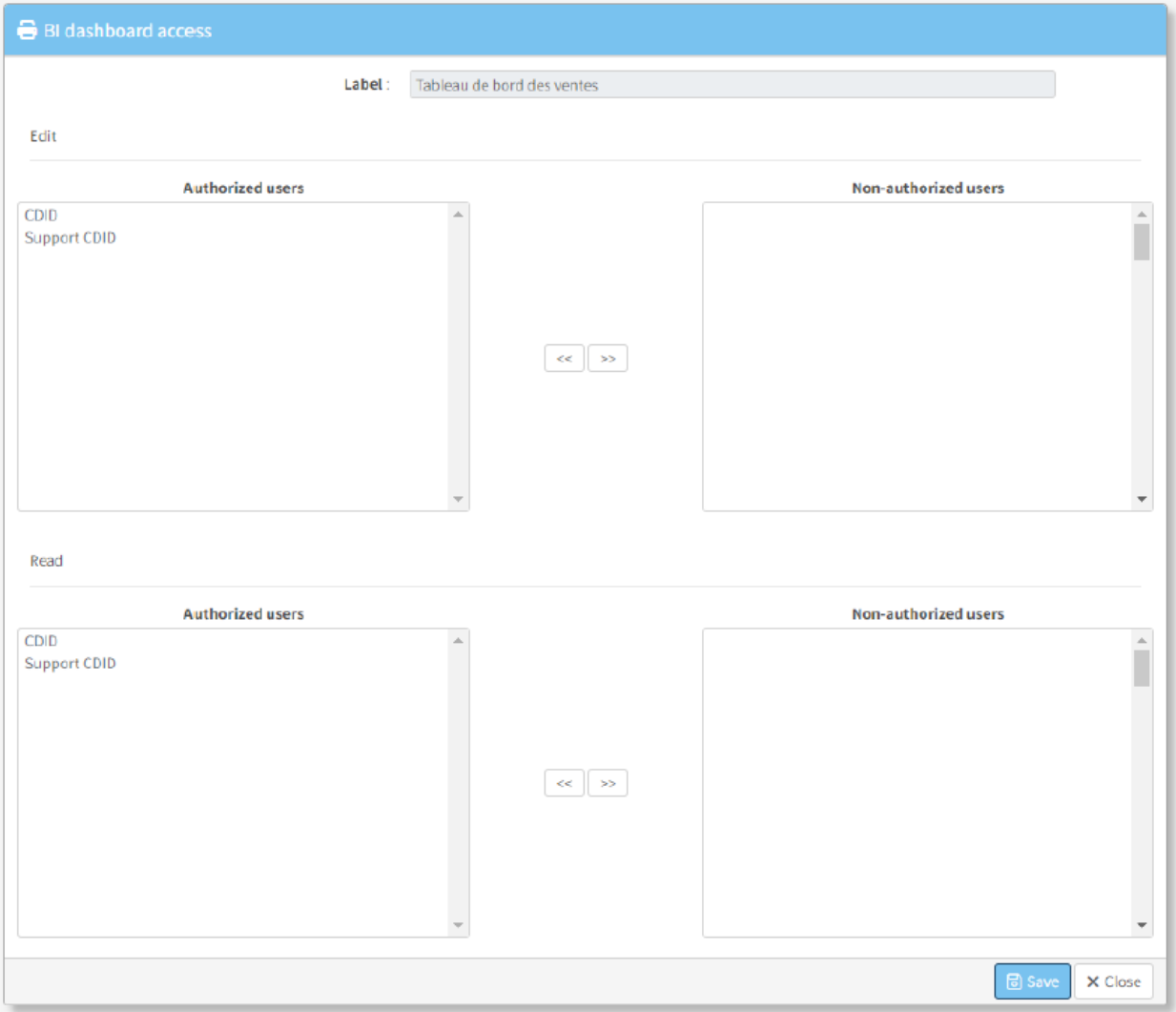
Buttons: Save, Close

To access a dashboard, your authorizing manager must grant you access to dashboards through the "Dashboard accesses" option in the "Utilities" menu of the "System Management" module.

To do this, they can select the desired dashboard and move users from the "Non-authorized users" section to the "Authorized users" section to grant access to the desired users for the dashboard.

Select the desired dashboard and move users from the "Non-authorized users" section to the "Authorized users" section to grant them access to this dashboard.

**NOTE:** When removing one or more authorized users from the "Edit" section, a message will be displayed to revoke SQL access for unauthorized users. This message allows to remove programming rights for the dashboard from those users.



## Sales Dashboard

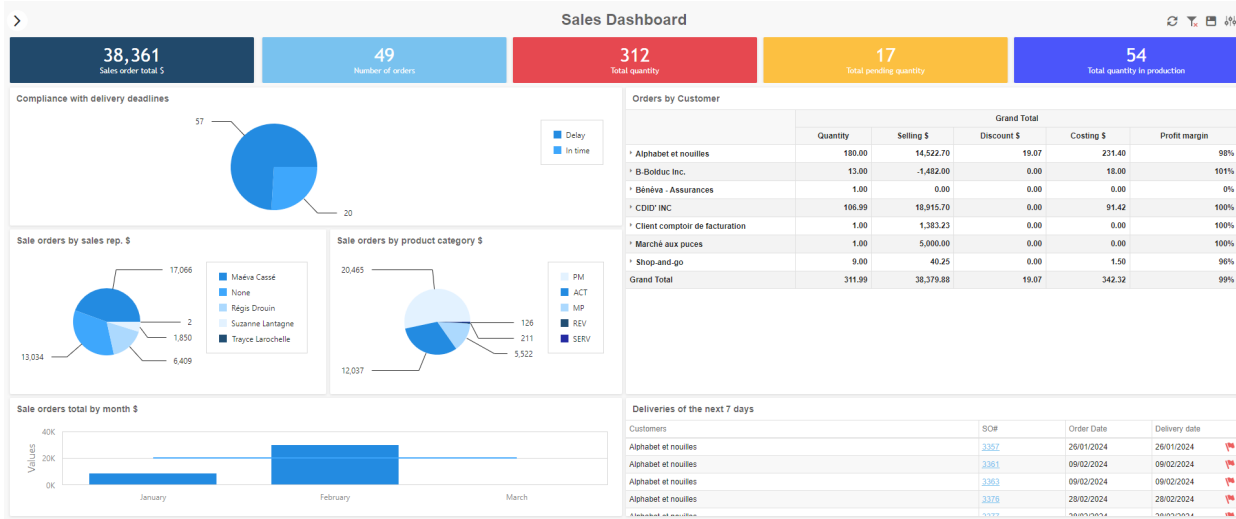
The sales dashboard allows you to visualize various information regarding your sales in one place.

To access this dashboard, the permissions manager will be able to grant you access.

**IMPORTANT:** All users with access to the dashboard will have access to all the displayed information of the dashboard, including access to costs, margins, and profits for the sales dashboard.

By default, this dashboard displays an interval of the current fiscal year.

However, you can change the date interval using the settings button.



In the dashboard header, you can quickly view the sales order total, the number of orders, the total quantity ordered, the pending quantity, and the quantity in production.

You will also be able to visualize the delivery time of your sales order, the total of sales order of your sales representatives, the total of orders by product categories and the total of sales order by month through the charts.

It is also possible to click on a data point in the charts "Sales order by sales re. \$" and "Sales order by product category \$" to refresh all other dashboard information according to the selected data.

The details of sales order per customer and the deliveries of your sales order for the next 7 days are also displayed in this dashboard.

**The sales order total** represents the monetary total, before taxes, of active and inactive orders, including rental orders.

**NOTE:** This total is converted into the company's currency and considers discounts applied to orders.

**The number of orders** represents the total number of active and inactive orders, including rental orders.

**The total quantity** represents the quantity of items present on active and inactive orders, including rental orders.

**The total pending quantity** represents the sum of the quantities of items to be manufactured from an active order, including rental orders, either waiting to be launched into production or for which the order has been launched in a work order, but no time has been punched into the work order.

**The total quantity in production** represents the quantity of items to be manufactured from active orders that have been launched into production, including rental orders, where the actual time on the work order is greater than zero.

**NOTE:** This quantity does not consider completed work orders.

**The "Compliance with delivery deadlines" pie chart** allows you to visualize the compliance of deliveries for active and inactive orders.

An order is considered "In time" if the delivery date of the order is before the current date.

An order is considered "Delay" if the delivery date of the order is after the current date.

**The "Sales order by sales rep. \$" pie chart** allows you to visualize the monetary value of active and inactive orders sold by seller.

**NOTE:** Amounts are converted into the company currency and considers the discounts applied on orders.

**The "Sales order by product category \$" pie chart** allows you to visualize the monetary value of active and inactive orders sold per product category.

**NOTE:** Amounts are converted into the company currency and considers the discounts applied on orders.

**The "Sales order by customers" table** allows you to visualize certain information about the items sold from active and inactive orders by customers.

For each customer, the total quantity of items sold, the total selling and costing, the total discounts applied, and the profit margin are displayed.

It is possible to click on a customer to display the same information for each detailed item.

A grand total is also displayed at the bottom of this table for all this information.

The "Sales order total by month \$" chart allows you to visualize the total amount of active and inactive orders per month.

Additionally, a line displays the sales budget for each month of the year in this dashboard.

**NOTE:** Amounts are converted into the company currency.

The "Deliveries of the next 7 days" table allows you to view active orders to be delivered in the next 7 days according to the order date and delivery date.

If the delivery date has passed, a small flag will be displayed.

Additionally, it is possible to open the report of undelivered products by selecting an order.

## Production Dashboard

The production dashboard allows you to visualize various information regarding your production in one place.

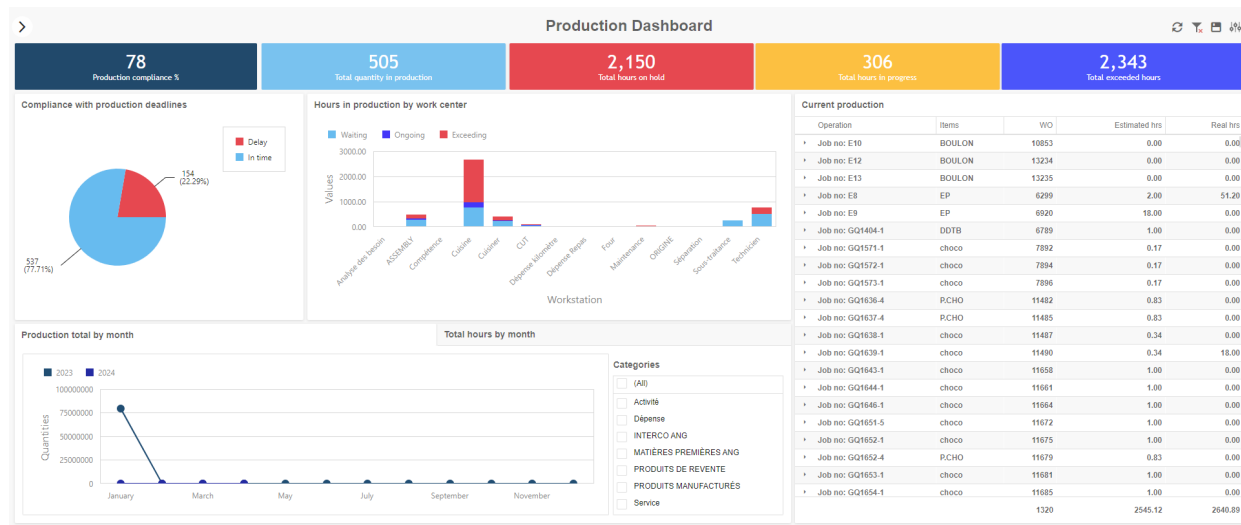
This dashboard only includes standard work orders, meaning it excludes installation work orders, service call work orders, and project work orders.

To access this dashboard, the permissions manager will be able to grant you access.

**IMPORTANT:** All users with access to the dashboard will have access to all the displayed information of the dashboard.

By default, this dashboard displays a date range from January 1st of the previous year to the current day.

However, you can change the date interval using the settings button.



In the header of this dashboard, you will be able to quickly view the production compliance percentage, the total quantity of work orders in production, as well as the total hours on hold, in progress, and exceeded for the work orders.

You will also be able to visualize the production compliance, the total hours in production per work center, the total production per month and the total hours per month through the charts. It is also possible to click on a data point in the charts "Hours in production by work center", "Production total per month", and "Total hours by month" to refresh all other information on the dashboard according to the selected data point.

The details of the current production is also displayed in this dashboard.

**The production compliance percentage** represents the portion of work orders that have been completed before or on the required date of the work order.

Additionally, active work orders with a required date later than today's date or the date of the dashboard are also considered as meeting the production deadline.

Only master work orders with a required date are considered in this percentage.

**The total quantity in production** represents the number of active work orders.

Only master work orders are considered in this total.

**NOTE:** This quantity does not consider the date range of the dashboard.

**The total hours on hold** represent the number of hours remaining to be performed on the operations of active work orders where the operation status is not "Completed".

If the estimated time for the operation is smaller than the actual time, no hours are compiled in this total.

Additionally, master work orders and their sub-assemblies are considered in this total.

**NOTE:** This total does not consider the date range of the dashboard.

**The total hours in progress** represent the number of actual hours punched on the operations of active work orders.

If the actual punched time is greater than the estimated time, only the estimated hours will be compiled in this total.

Additionally, master work orders and their sub-assemblies are considered in this total.

**NOTE:** This total does not consider the date range of the dashboard.



**The total exceeded hours** represent the number of hours that have exceeded the estimated time on the operations of active work orders.

Additionally, master work orders and their sub-assemblies are considered in this total.

**NOTE:** This total does not consider the date range of the dashboard.

**The "Compliance with production deadline" pie chart** allows you to visualize the compliance with production deadlines for active and completed work orders.

Active work orders are considered "In time" if the work order does not have a required date or if the required date has not passed.

Active work orders are considered "Is coming to an end" if the work order's required date is within the next 5 business days.

Active work orders are considered "Delay" if the work order's required date is earlier than today's date.

Completed work orders are considered "In time" if the work order does not have a required date or if it was completed before or on the required date.

Completed work orders are considered "Delay" if the work order was completed after its required date.

Only master work orders are considered in this chart.

**NOTE:** This chart does not consider the date range of the dashboard.

**The "Hours in Production by work center" bar chart** allows you to visualize the estimated hours versus the actual punched hours by workstation for active work orders.

This bar chart displays the same information as the cards "Total hours on hold", "Total hours in progress", and "Total exceeded hours".

For further explanations on this bar chart, please refer to the explanations of the previous cards.

**NOTE:** This pie chart does not consider the date range of the dashboard.

**The "Current Production" table** allows you to visualize the estimated hours versus the actual punched hours on the operations of active work orders.

The total actual punched hours correspond to the sum of the hours in progress and overdue of the operations on the active work orders.

Additionally, the work orders and their sub-assemblies are displayed in this table.

The first total at the bottom of the table corresponds to the total number of operations on the work orders.

The second and third totals at the bottom of the table correspond to the total estimated hours and actual punched hours on the operations of active work orders.

**NOTE:** This table does not consider the date range of the dashboard.

The "Production total by month" scatter chart allows you to visualize the total quantity of work orders launched into production per month.

Only master work orders are considered in this total.

The "Total hours by month" scatter chart allows you to visualize the estimated hours of work orders launched into production per month.

Only master work orders are considered in this total.

## Purchase Dashboard

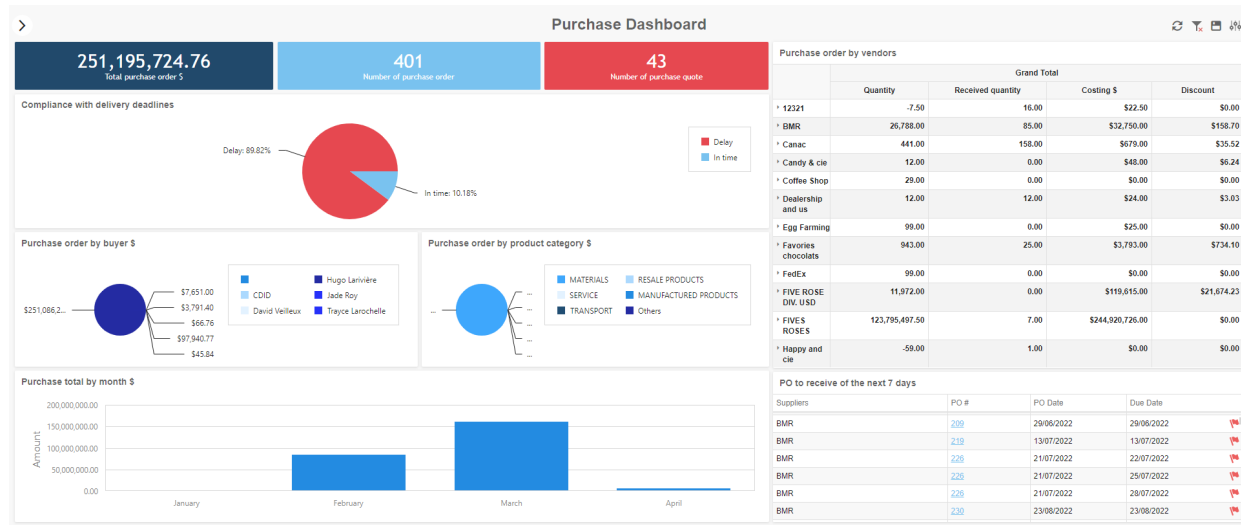
The purchase dashboard allows you to visualize various information regarding your purchases in one place.

To access this dashboard, the permissions manager will be able to grant you access.

**IMPORTANT:** All users with access to the dashboard will have access to all the displayed information of the dashboard.

By default, this dashboard displays an interval of the current fiscal year.

However, you can change the date interval using the settings button.



In the dashboard header, you can quickly view the purchase order total, the number of purchase order and the number of purchase quote.

You will also be able to visualize the delivery time of your purchase orders, the total of purchase orders by buyer, the total of purchase orders by product and the purchase total by month through the charts.

It is also possible to click on a data point in the charts "Purchase order by buyer \$" and

"Purchase order by product category \$" to refresh all other dashboard information according to the selected data.

The details of purchase order by vendor and the purchase order to receive of the next 7 days are also displayed in this dashboard.

**The total purchase order** represents the total monetary, before taxes, of active and inactive purchase orders.

**NOTE:** This total is converted into the company's currency and displays the amount after purchase order discounts.

**The number of purchase order** represents the total number of active purchase orders.

**NOTE:** This number does not consider the date range of the dashboard.

**The number of purchase quote** represents the total number of active purchase quotes.

**NOTE:** This number does not consider the date range of the dashboard.

**The "Compliance with delivery deadlines" pie chart** allows you to visualize the compliance of deliveries for active and inactive purchase orders.

A purchase order is considered "On time" if the reception date is before or equal to the required date.

A purchase order is considered "Late" if the delivery date of the purchase order detail line is received after the required date, or if the required date of the purchase order is before the current date and it has still not been received.

**The "Purchase order by buyer \$" pie chart** allows you to visualize the monetary value of active and inactive purchase orders by buyer.

**NOTE:** These amounts are converted into the company's currency and displays the amounts after purchase order discounts.

**The "Purchase order by product category \$" pie chart** allows you to visualize the monetary value of active and inactive purchase orders by product category.

**NOTE:** These amounts are converted into the company's currency and displays the amounts after purchase order discounts.

**The "Purchase order by vendors" table** allows you to visualize certain information about purchased items from active and inactive purchase orders by suppliers.

For each supplier, the total quantity of items purchased, the quantity received of their items, the cost of the items, and the total discounts applied are displayed.

It is possible to click on a supplier to display the same information for each detailed item. A grand total is also displayed at the bottom of this table for all this information.

**NOTE:** These amounts are converted into the company's currency.

The "**Purchase total by month \$**" chart allows you to visualize the total amount of active and inactive purchase orders per month.

**NOTE:** These amounts are converted into the company's currency.

The "**PO to receive of the next 7 days**" table allows you to visualize active purchase orders to be received in the next 7 days according to the purchase order date and required date.

If the required date is exceeded, a small flag will be displayed.

Additionally, it is possible to open the back-order (BO) report by selecting a purchase order.