

# Dashboards

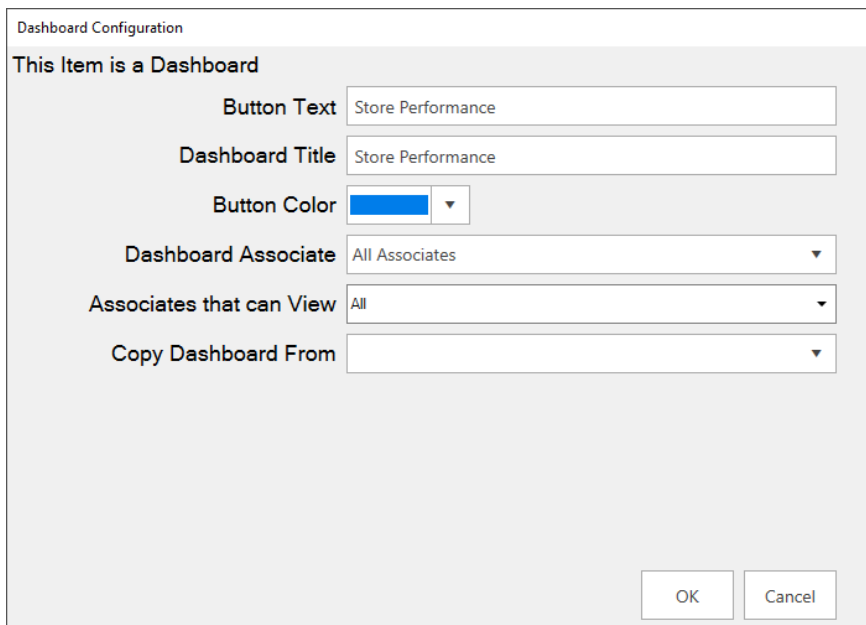
## Introduction

Dashboards allow you to put pertinent data at your fingertips in an intuitive, graphical display. They are completely customizable and you can create as many as you like.

## Creating Dashboards

To create a new **Dashboard**:

1. Click **Dashboards > Add**.



The screenshot shows a 'Dashboard Configuration' dialog box with the following fields and options:

- Button Text:** Text input field containing 'Store Performance'.
- Dashboard Title:** Text input field containing 'Store Performance'.
- Button Color:** Color selection dropdown menu with a blue color swatch.
- Dashboard Associate:** Dropdown menu with 'All Associates' selected.
- Associates that can View:** Dropdown menu with 'All' selected.
- Copy Dashboard From:** Empty dropdown menu.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

**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 that this Dashboard's data is based on

**Associates that can View** Associates that have permission to view this Dashboard

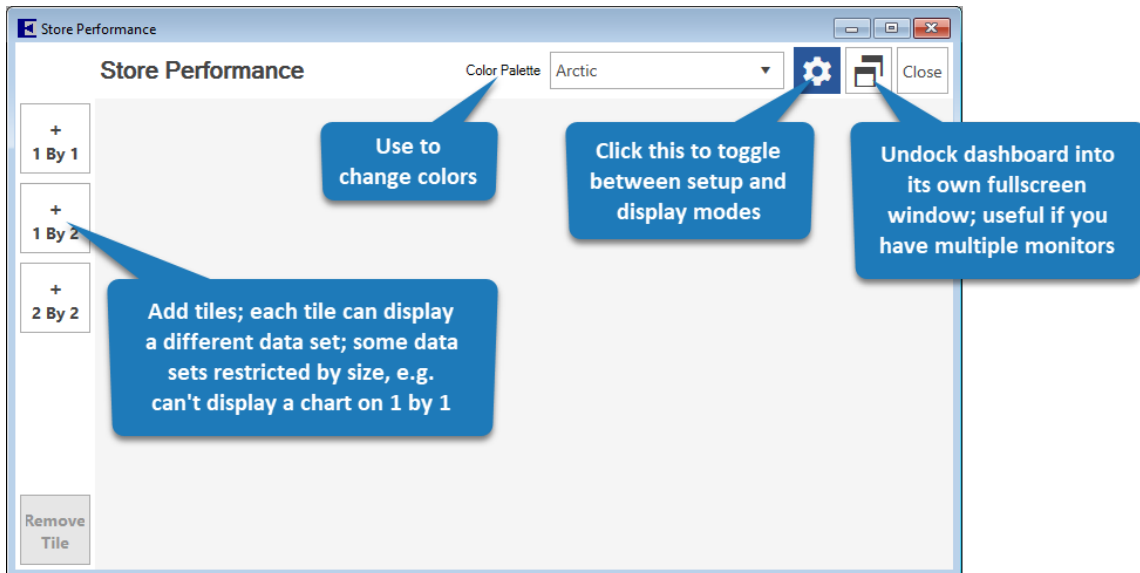
**Copy Dashboard From** Copy initial Dashboard setup from an existing one

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 **Dashboard Management** 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.

Dashboard Tile Setup

Instruct

#  
Numeric

Gauge

Chart

### Tile Setup

Tile Title

Instructions

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.

7. There are three 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

8. For this example, click on **Chart**.

9. Use the drop-downs to select:

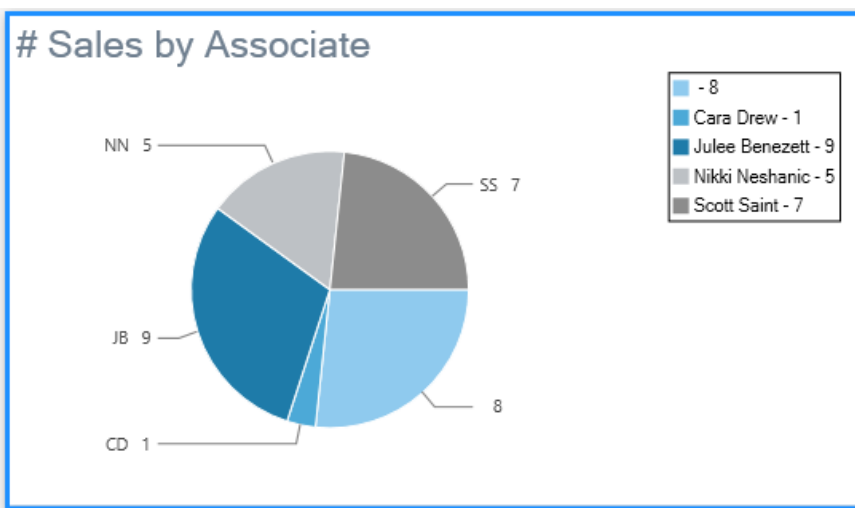
a. **Data Set:** Sales Data

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.



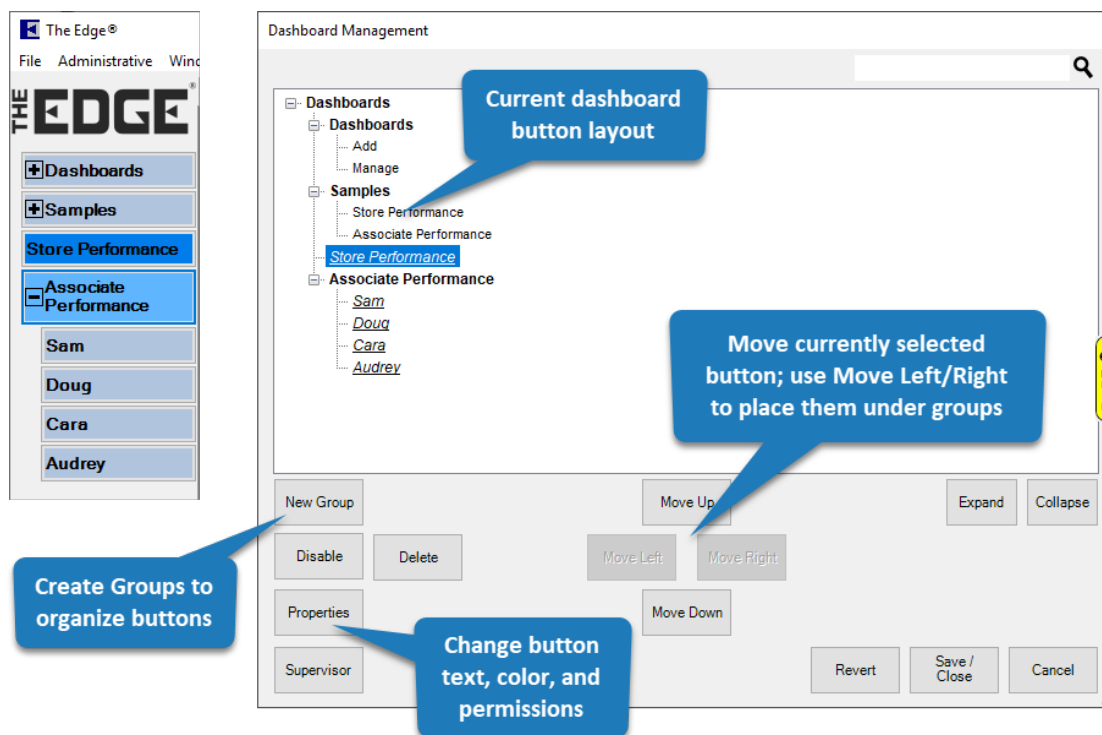
12. Repeat to add as many additional tiles as you like.

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

## Dashboard Management

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.

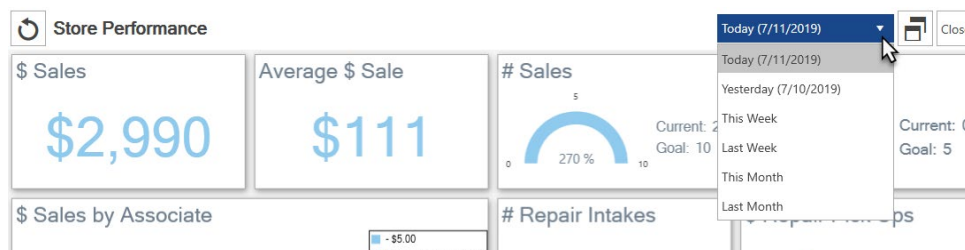


2. This window will reflect the current button layout. Each time you create a new Dashboard, it will show up at the bottom of the list.
3. To change the button order, select the button and use **Move Up / Move Down**.
4. To group buttons, first click **New Group** and enter text to display. Then use **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.

## 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 that this does not appear when you have configuration mode (Gear icon) toggled on.



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**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](mailto:Support@ajsllc.com). We also have plans to add additional tile sizes and types.