

Adaxa



**Sales Representatives Dashboard
- example showing simple
system extension capabilities**

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1 Executive Summary

1.1 Purpose of this Document

ADempiere has great capabilities in creating and reconfiguring Windows that can be used to quickly add functionality without either changing code or alternatively, changing very little code.

As an example, this document shows how a Window was added that provided much of the functionality offered by products like SugarCRM. Adding extra functionality in ADempiere avoids the cost and complexity of trying to run two systems and keep them in sync with duplicated lists of Customers, Contacts, Addresses and Sales Opportunities.

It is also intended to show that it is of more importance that an application is easily extended by the user than whether a particular piece of functionality exists in an application at a point in time.



2 The Sales Representative Dashboard

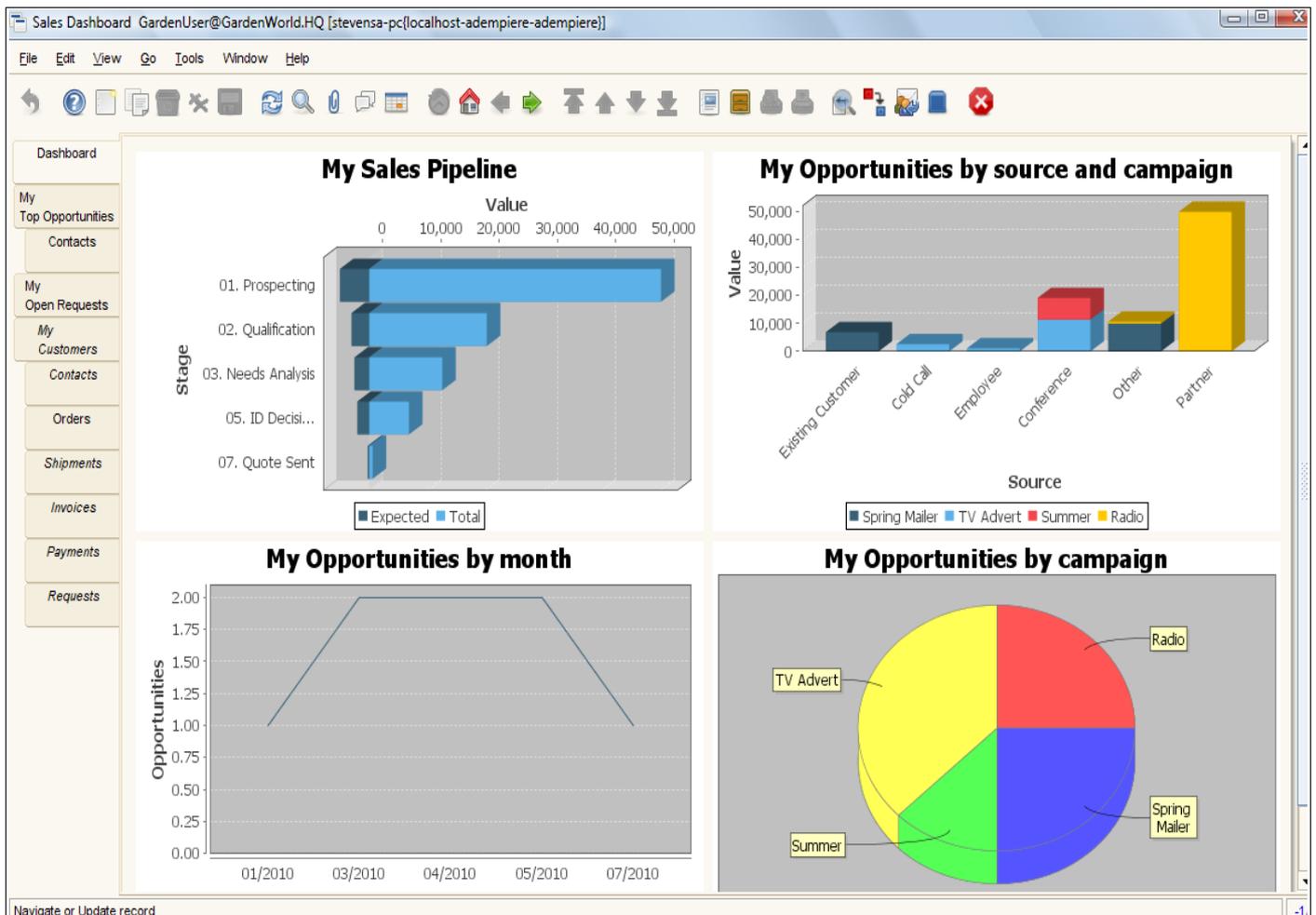
2.1 The Window and Tabs

Using Adempire's standard Window definition screens a Window was added and named **"Sales Dashboard"**.

As can be seen below the window has 11 tabs, each of which displays different types of information.

2.2 "Dashboard" Tab

The first tab has been named **"Dashboard"**. It shows a series of graphs.



2.3 The “Dashboard” Graph Fields

The graph fields have been defined in the user window which allows the definition of “Performance Measures”. Performance measures are typically displayed as graphs. The Performance Measure may require a sql statement to be entered to bring back the required information for the graph. Each graph is simply linked to a field on the window to make it visible.

The field called **“My Sales Pipeline”** has been added to the window by clicking the “Create Field” button and selecting the column. The column in turn was defined as type=graph and the link to the Performance Measure was entered. The same was done to display each of the other graphs shown above.

Each component of each graph represents a set of underlying opportunity/proposal/quotation records. If the User double-clicks on the blue bar in graph 1 labelled “01 Prospecting” then a sales order window will be opened and records will be displayed. The displayed records will be the records that composed the graph component that was clicked on. (The same behaviour applies for all the graphs.)

2.4 The “My Opportunities” Tab

The **“My Opportunities”** tab displays a number of Sales Order records which have been selected according to a rule we entered in the tab which says “find the top 10 records of all sales order records which are still opportunities rather than real orders. Select the top 10 by multiplying the expected order value by the probability we have allocated to it based on its position in the sales funnel for this logged in user”. This selection statement is entered in the Window by an admin user and does not require any code change.

Looking at these sales opportunities in spreadsheet view displays the following in spreadsheet view:



Sales Dashboard 20019 GardenUser@GardenWorld.HQ [stevensa-pc[localhost-adempiere-adempiere]]

File Edit View Go Tools Window Help

Dashboard	Document No	Order Reference	Description	Opportunity Stage	Document Type	Sales Team	Sales Rep	Total Lines	Expected Revenue	Expected Order Date	Revenue Sp
	20019		opportunity to build a duplex at Taree	01 .Prospecting	Proposal	North	GardenUser	50,000.00	5,000.00	31/07/2010	
My Top Opportunities	20006			05. ID Decision Makers	Opportunity	East	GardenUser	6,800.00	2,040.00		
	20011			03. Needs Analysis	Opportunity	West	GardenUser	10,000.00	2,000.00	31/05/2010	
Contacts	20014	Order Reference 1234	Order3	02. Qualification	Opportunity	South	GardenUser	11,400.00	1,710.00	01/06/2010	
	20008			02. Qualification	Opportunity	East	GardenUser	7,700.00	1,155.00		
My Open Requests	20004			03. Needs Analysis	Opportunity	East	GardenUser	2,500.00	500.00		
	10000			07. Quote Sent	Quotation	North	GardenUser	570.00	228.00	31/05/2010	
My Customers	20013			02. Qualification	Opportunity	East	GardenUser	1,026.00	153.90	31/05/2010	
Contacts	20018			05. ID Decision Makers	Opportunity		GardenUser	0.00	0.00	15/04/2010	
Orders											
Shipments											
Invoices											
Payments											
Requests											

1 Line(s) - 50,000.00 - Total: 50,000.00 USD = 50,000.00

Navigate or Update record

The spreadsheet view allows the user to move up/down and left/right and optionally highlight a single record and look at it in Form view. After clicking the "toggle view" button the form view is displayed. The form View looks as follows:

Document No: 20014 Order Reference: Order Reference 1234

Description: Order3

Opportunity Stage: D2. Qualification Document Type: Opportunity

Sales Team: South Sales Rep: GardenUser

Total Lines: 11,400.00 Expected Revenue: 1,710.00 Expected Order Date: 01/06/2010

Revenue Spread: 111 Lead Source: Conference Reason For Loss:

Business Partner: C&W Construction Partner Location: Stamford User/Contact: Carl Boss

Price List: Standard Currency: USD

Reference

Project: Campaign: TV Advert

Status

Document Status: In Progress Document Type: Opportunity [Prepare](#)

[Copy From](#)

Order	Date Promised	Date Ordered	Line No Product	Charge	Quantity/UOM	Ordered Quantity	Price	Unit Price	L
20014_2010-05-23 00:00:00	23/05/2010	23/05/2010	10 9310539268002_Elm Tree		200 Each	200	57.00	57.00	
20014_2010-05-23 00:00:00	23/05/2010	23/05/2010	20 Seeder_Grass Seeder		2 Each	2	27.00	27.00	

1 Line(s) - 11,400.00 - Total: 11,400.00 USD = 11,400.00

This shows all the details of the opportunity/proposal/quote in a single screen.

Some points to note:

- The Opportunity Stage can be selected from a dropdown which will show a filtered list of values determined by whether the Document Type is an Opportunity/Proposal/Quote etc. These stages and the percentage probability to apply are defined by the Sales Manager.
- A Sales Team can be selected and thus provide access to this record to anyone in that Team.
- The Expected Order Date is when we expect to receive the order.
- The Promise Date (unfortunately omitted in the above demonstration screen) is the date we can start invoicing.
- The Revenue Spread field can have any integer value entered – example 101 is interpreted in forecast revenue reports as 505 in the 'Promise Date' Month, 0% in the next month and 50% in the month after.
- The Lead Source, Campaign etc are selected from a dropdown list populated by the Sales Manager or his/her delegate.

- The other columns in the order header are largely self evident.
- The Sales Order Lines show the actual items that are to be sold. Note that each has an Order Date and a Promise Date to allow for timing differences in the delivery and invoicing of individual lines. A "Revenue Spread" column could also be added by the user at a line level if that was required. In the above demonstration screen the values would be inherited from the Sales Order header record.

2.5 The "Contacts" Tab

After highlighting a particular opportunity in the **"My Opportunities"** tab the user can select the **Contacts** tab. The Contacts tab will display all the Contacts that are associated with the customer of the selected opportunity.

Client	Organization	Title	Name	Description	Comments	Active	Business Partner	Partner Location	Email Address	Phone	2nd Phone	Fax	Position
GardenWorld		Purchasing officer	Harry Smith			<input checked="" type="checkbox"/>	Chemical Product, inc	Sydney	harry.smith@company.com	+61234567890	+61287652345		BP Prj
GardenWorld		Marketing Manager	Sarah Wilson			<input checked="" type="checkbox"/>	Chemical Product, inc	Sydney	harry.smith@company.com	+61234567890	+61287652345		BP Pa

After clicking the grid toggle button to go to form view, the details of that particular Contact are displayed as follows:

The screenshot displays a web browser window titled "Sales Dashboard 10000 swilson Sarah Wilson GardenUser@GardenWorld.HQ [stevensa-pc{localhost-adempiere-adempiere}]". The browser's address bar and menu bar are visible. The main content area shows a contact form for Sarah Wilson. The form includes the following fields and values:

- Client: GardenWorld
- Organization: *
- Title: Marketing Manager
- Name: Sarah Wilson
- Description: (empty)
- Comments: (empty)
- Active:
- Business Partner: Chemical Product, inc
- Business Partner Status: The record is active in the system
- Email Address: harry.smith@company.com
- Phone: +61234567890
- 2nd Phone: =61287652346
- Fax: (empty)
- Position: BP Payables Contact
- Birthday: 23/12/1990

Below the main form, there is an "External" section with the following fields:

- Last Contact: (empty)
- Last Result: (empty)

At the bottom of the window, a summary bar shows "1 Line(s) - 570.00 - Total: 570.00 USD = 570.00". A "Navigate or Update record" button is located in the bottom left corner, and a "2/2" indicator is in the bottom right corner.

Any additional information that the user wishes to keep about a contact can be captured by adding new fields to the window in the Window definition screen. These new fields will be displayed the next time the window is opened by anyone. If Asterisk Telephony integration is in use then it will be possible to right-click a phone number, select "make call" and the system will phone the Contact. Similar functionality will allow an email to

be created or an appointment to be booked provided all the necessary configuration has been done and your mail server supports this integration with ADempiere.

2.6 The “My Open Requests” Tab

A **Request** is the ADempiere equivalent of a Ticket or a Case. It is a record that is created either by:

- a customer typing something in the website or
- an employee directly creating the record (maybe as a result of a phone call) or
- an email being received at a particular email address.

The Request is routed to a person or group of persons having a particular Role. Each stage in the life of the Request is logged with History records. The Request Processor will automatically create reminders and escalate to Management based on user-defined rules for that Request Type.

This tab displays **Open Requests** that need to be attended to by this Sales Representative.

The **Request** record looks as follows:
(the top of the screen)

Sales Dashboard 10000001 swilson Sarah Wilson GardenUser@GardenWorld.HQ [stevensa-pc[localhost-adempiere-adempiere]]

File Edit View Go Tools Window Help

Client: GardenWorld Organization: HQ

Document No: 10000001 Due type: Overdue

Request Type: Request for Quotation Group: Trees

Category: Related Request:

Status: 9_Final Close Resolution:

Priority: Medium User Importance: Medium

Summary: pls quote me for 10 plum trees asap for deliv over 2 months

Confidentiality: Partner Confidential Invoiced

Escalated Self-Service

Action

Sales Representative: GardenUser Role: GardenWorld Admin

Date next action: 12/07/2010 0:00:00 Entry Confidentiality: Partner Confidential

Standard Response: Mail Template:

Result:

Product Used: Quantity Used: 0

Activity: Quantity Plan: 0

Task Status: Complete Plan:

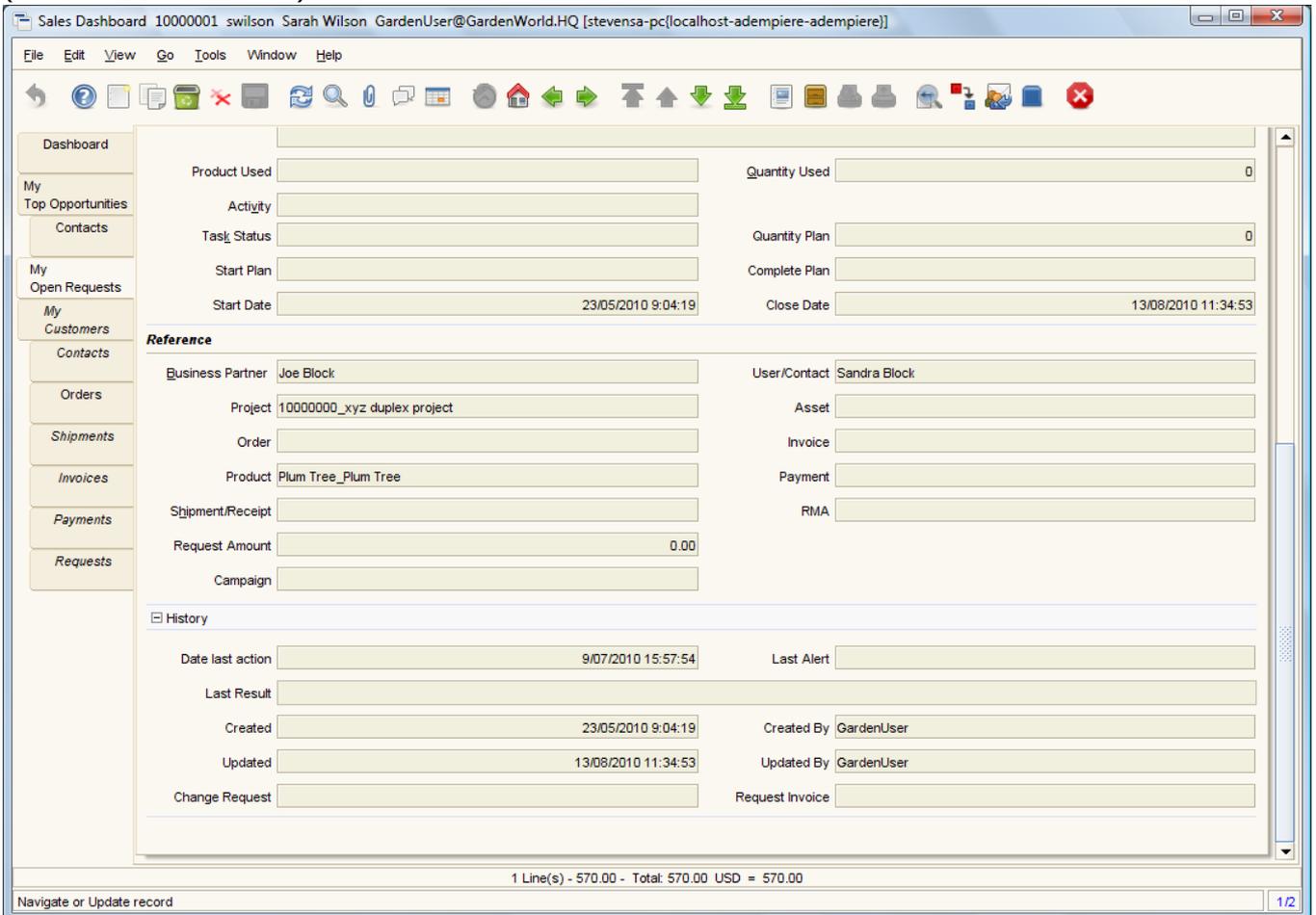
Start Plan: Close Date: 13/08/2010 11:34:53

Start Date: 23/05/2010 9:04:19

1 Line(s) - 570.00 - Total: 570.00 USD = 570.00

Navigate or Update record 1/2

(the bottom of the screen)



Sales Dashboard 10000001 swilson Sarah Wilson GardenUser@GardenWorld.HQ [stevensa-pc{localhost-adempiere-adempiere}]

File Edit View Go Tools Window Help

Dashboard

My Top Opportunities

Contacts

My Open Requests

My Customers

Contacts

Orders

Shipments

Invoices

Payments

Requests

Product Used

Quantity Used

Activity

Task Status

Quantity Plan

Start Plan

Complete Plan

Start Date

Close Date

Reference

Business Partner

User/Contact

Project

Asset

Order

Invoice

Product

Payment

Shipment/Receipt

RMA

Request Amount

Campaign

History

Date last action

Last Alert

Last Result

Created

Created By

Updated

Updated By

Change Request

Request Invoice

1 Line(s) - 570.00 - Total: 570.00 USD = 570.00

Navigate or Update record 1/2

The above record does not display a lot of completed data but you can broadly see its function from the fields of data stored.

2.7 The “My Customers” Tab

The **My Customers** tab has just been configured to display the group of customers for which the logged-in user is recorded as the current Sales Representative.

The data displayed is the same as that displayed in the normal Customer window. The data can be made editable here or read-only as required by ticking the appropriate boxes in the Window definition.

The **My Customer** tab looks as follows:

Sales Dashboard 10000001 10000000 fred smith GardenUser@GardenWorld.HQ [stevensa-pc{localhost-adempiere-adempiere}]

File Edit View Go Tools Window Help

Dashboard	Client	Organization	Search Key	Name	Description	Active	Business Partner Group	Open Balance	Customer	Vendor	Sales Re
	GardenWorld	HQ	10000000	fred smith		<input checked="" type="checkbox"/>	Standard Customers	0.00	<input type="checkbox"/>	<input type="checkbox"/>	
My	GardenWorld	HQ	adaxa	adaxa	Walk-In Customer	<input checked="" type="checkbox"/>	Standard Customers	-215.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Top Opportunities	GardenWorld	*	C&W	C&W Construction		<input checked="" type="checkbox"/>	Standard Customers	161.12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contacts	GardenWorld	*	Chemical Product, inc	Chemical Product, inc		<input checked="" type="checkbox"/>	Vendors	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	GardenWorld	HQ	Joe	Joe Matthew	Walk-In Customer	<input checked="" type="checkbox"/>	Standard Customers	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
My Open Requests	GardenWorld	*	JoeBlock	Joe Block		<input checked="" type="checkbox"/>	Standard Customers	531.98	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	GardenWorld	*	Standard	Standard	Walk-In Customer	<input checked="" type="checkbox"/>	Standard Customers	62.75	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

1 Line(s) - 570.00 - Total: 570.00 USD = 570.00

Navigate or Update record 17

The view can be toggled from spreadsheet view to form view as described in the previous sections. The screen shot has been omitted here.

2.8 Additional Tabs

The additional tabs of:

- Contacts
- Orders
- Shipments
- Invoices

- Payments
- Requests

will display all the records of each type that is linked to the selected record in the **'My Customers'** tab. Again the records can be toggled to display in spreadsheet or form view as desired by the user.

2.9 Additional Optional Functionality

2.9.1 Adding Extra Tabs

Because the Windows and Tabs are simply defined in the Window definition it is quite easy to display additional information required in a particular business.

The process to do this is as follows:

- Go to the Window definition(as an admin user)
- In the list of tabs, click "New Record"
- select the table or view where the data is stored in the database and click "get me the fields"
- set the 'tab level" so it knows which is its parent record (sometimes you need to explicitly set it)
- use the graphical tool to put the fields in the display order you want
- log out and log in as a user to see the window with the new tab

An example might be displaying a "Notes" tab. The **Notes** tab would allow a user to add a Note for a selected Customer and maybe Product and/or Project. The Note can also be ticked as a Warning. If the user opens a record where the required combination of Customer/Product/Project (or whatever you have defined) is present then a message box will open in the screen and display the Note as a warning. Alternatively you may select to add notes by simply clicking the memo tool displayed in the toolbar used in every window. The note will be created and each addition to it will be stamped with the relevant user and the date/time. [Note that standard ADempiere functionality allows you to set a flag on each table to record every change. These changes can then be displayed by clicking on the bottom-right corner of the Window].

2.9.2 Controlling Which Tabs are Displayed

It is possible to add a drop-down list to the top Tab of the Window. The drop-down list can contain a user-generated list of values. It is possible to set a flag on each tab to say "only display this tab if the list value selected in the top tab is one of the following". This allows quite complex windows to be created with conditional display this avoiding setting up multiple menu entries.

3 Conclusion

We hope that this document has demonstrated that it is very easy to add new functionality inside ADempiere frequently without changing code. The importance of this demonstration is that ERP&CRM systems are often chosen on the basis of whether they presently have a particular piece of functionality. We hoped to show that perhaps a better question is "how easily can I add any missing functionality for myself and does it have any impact on moving to new versions". In ADempiere we believe the answer to those questions is "easily" and "no impact"

It is important to note that not all desired new functionality can be provided without a code change but even if a code change is needed, ADempiere provides a way to create that change and simply apply it over the top of the standard code so that changes are easily managed.



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NOTES

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