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

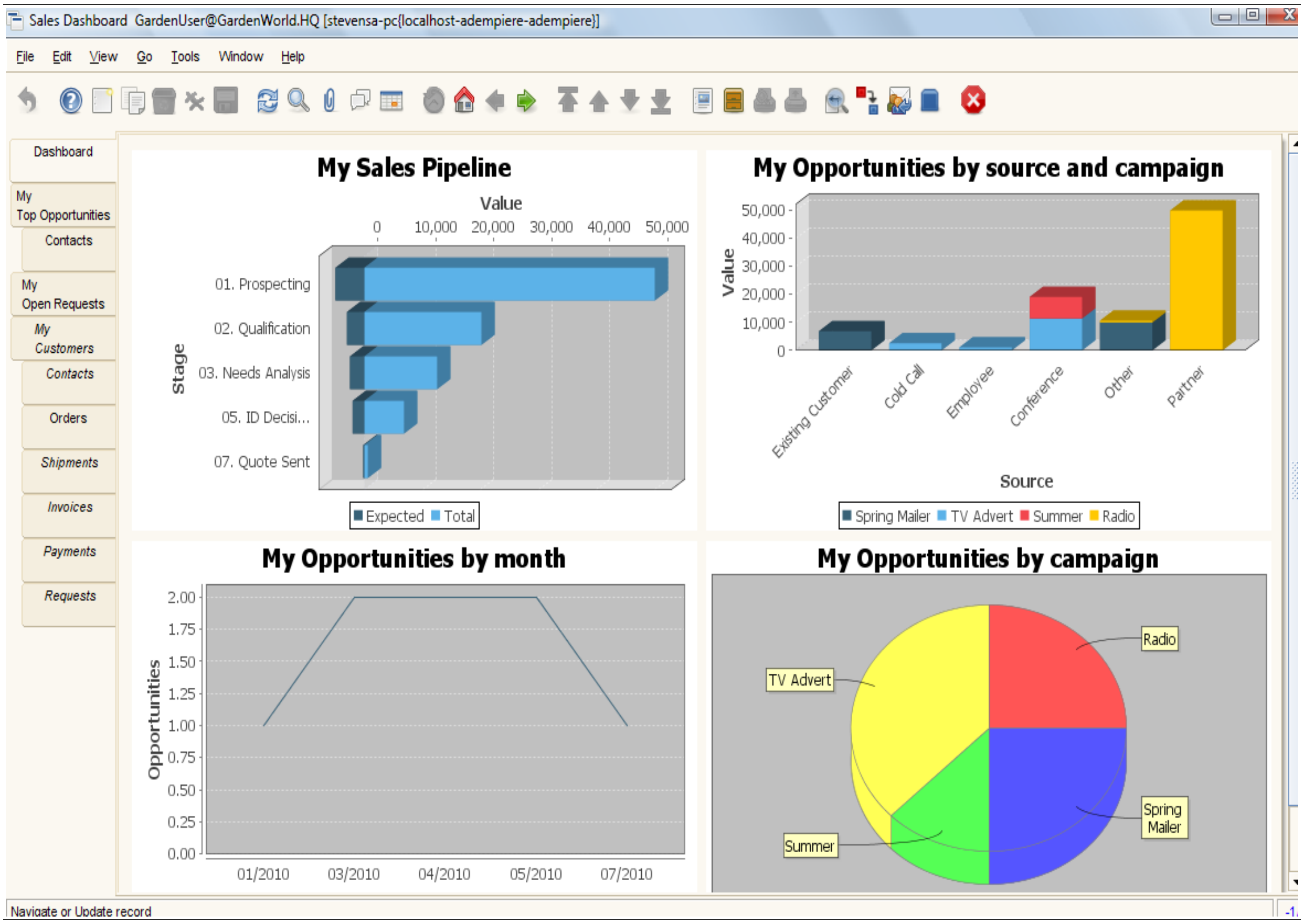
2.1 The Window and Tabs

Using Adempiere'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.

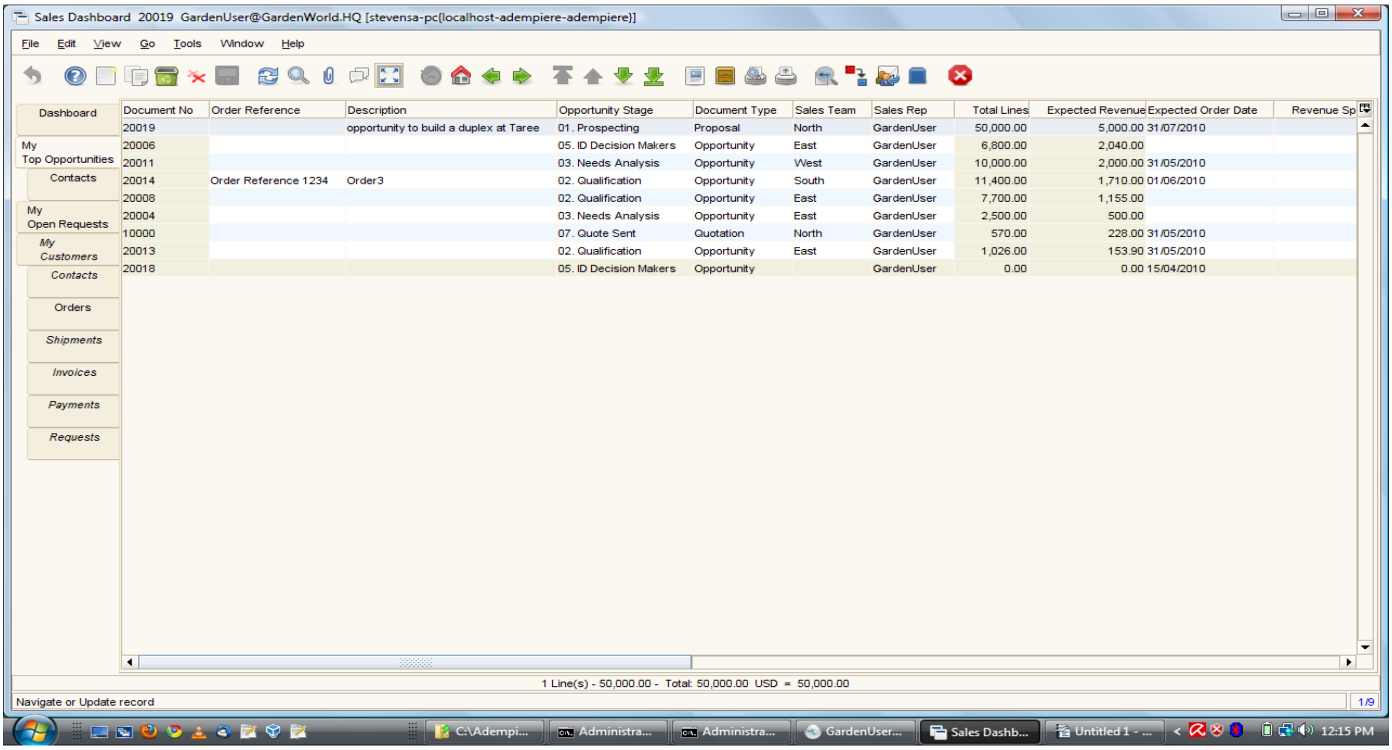
The field called ***“My Sales Pipeline”*** has been added to the window by clicking the “Create Field” button and selecting the column. The column in turn was defined as type=graph and the link to the Performance Measure was entered. The same was done to display each of the other graphs shown above.

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.)

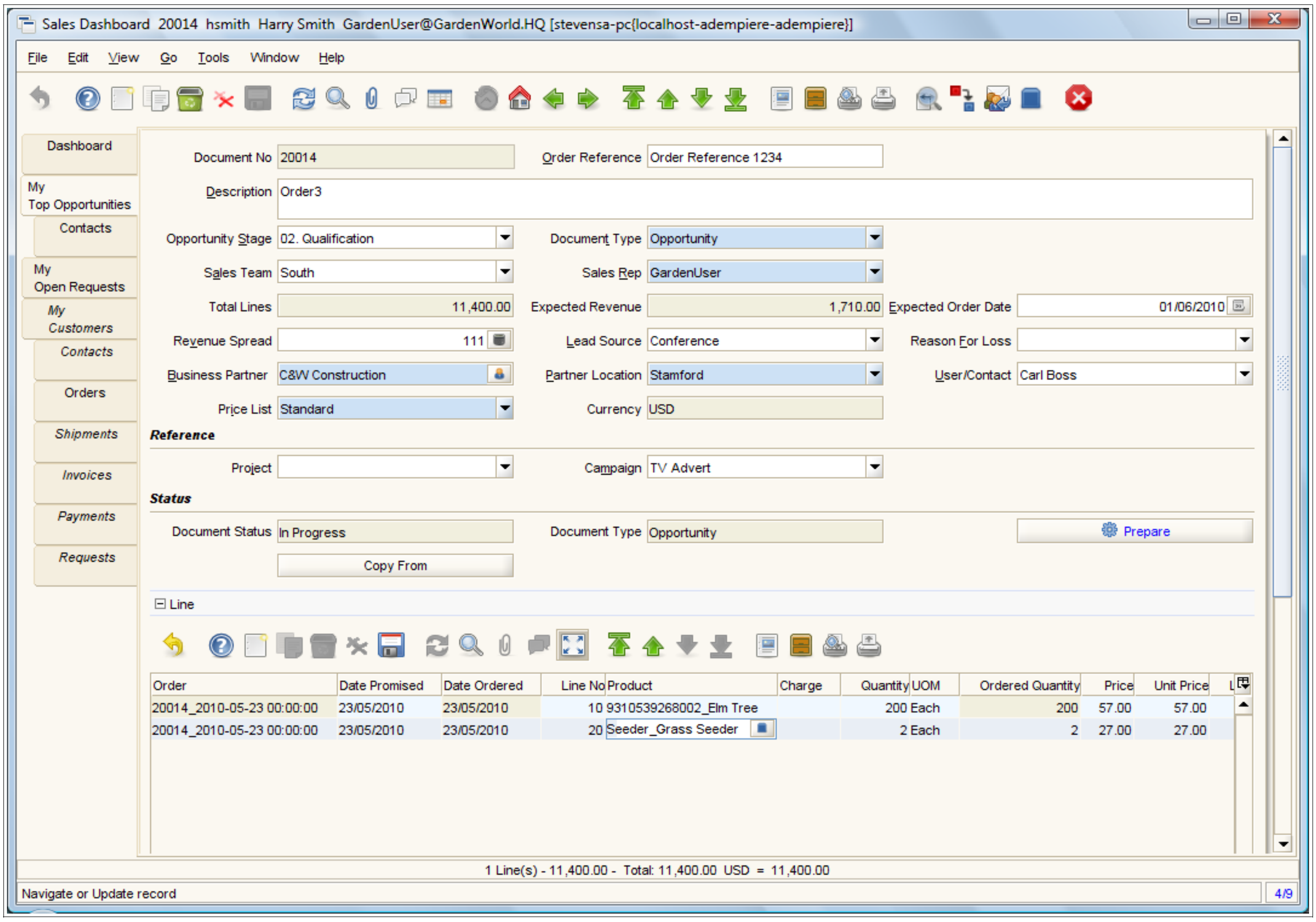
2.4 The “My Opportunities” Tab

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:



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:



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

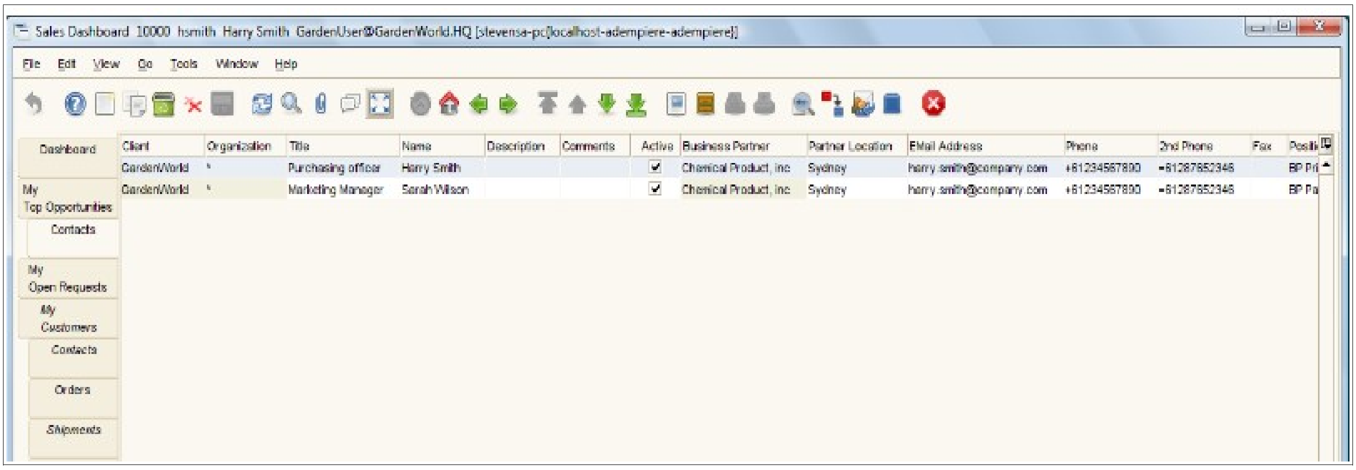
Some points to note:

- 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.

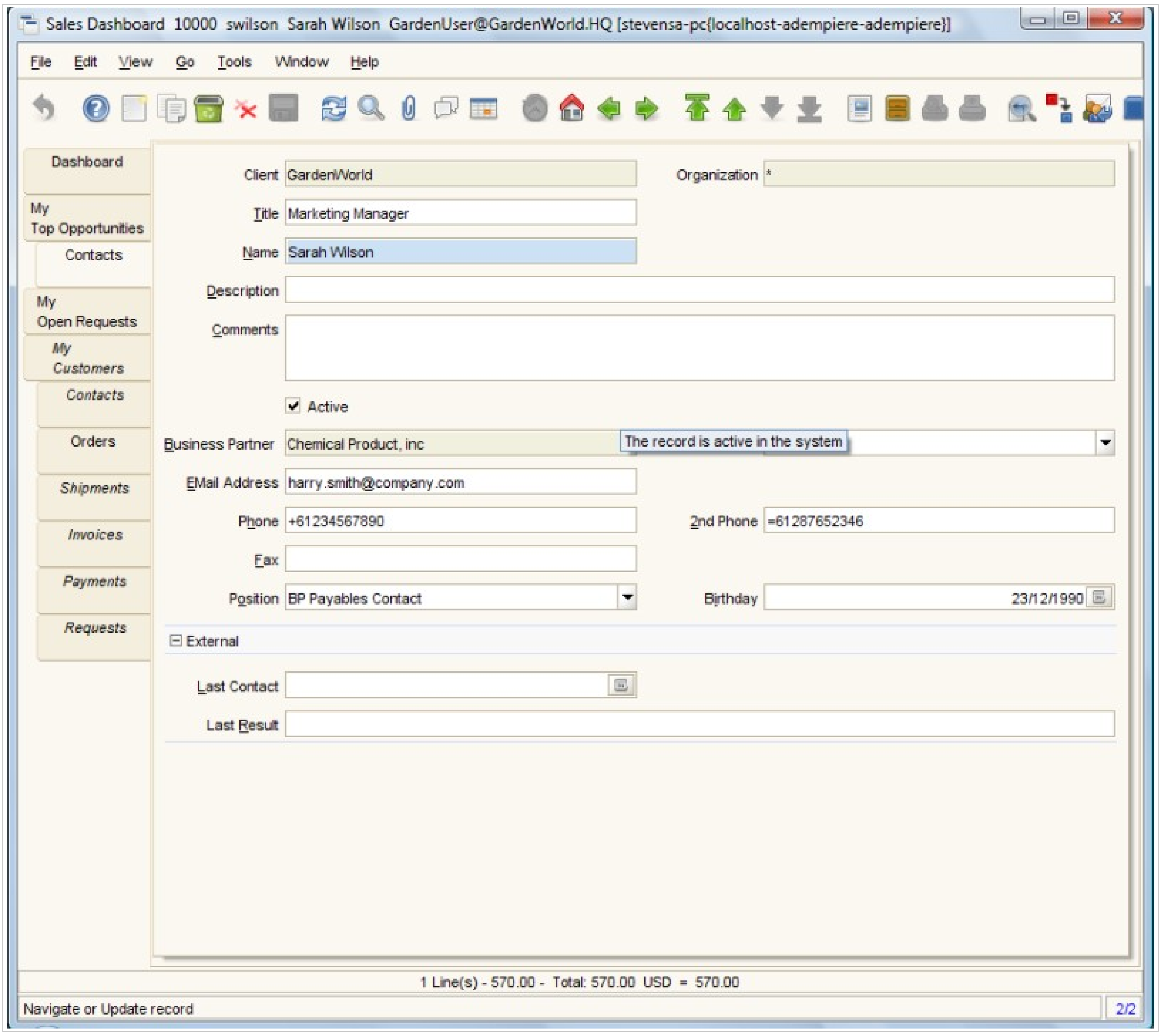
- The other columns in the order header are largely self evident.
- The Sales Order Lines show the actual items that are to be sold. Note that each has an Order Date and a Promise Date to allow for timing differences in the delivery and invoicing of individual lines. A "Revenue Spread" column could also 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 the ***Contacts*** tab. The Contacts tab will display all the Contacts that are associated with the customer of the selected opportunity.



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



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

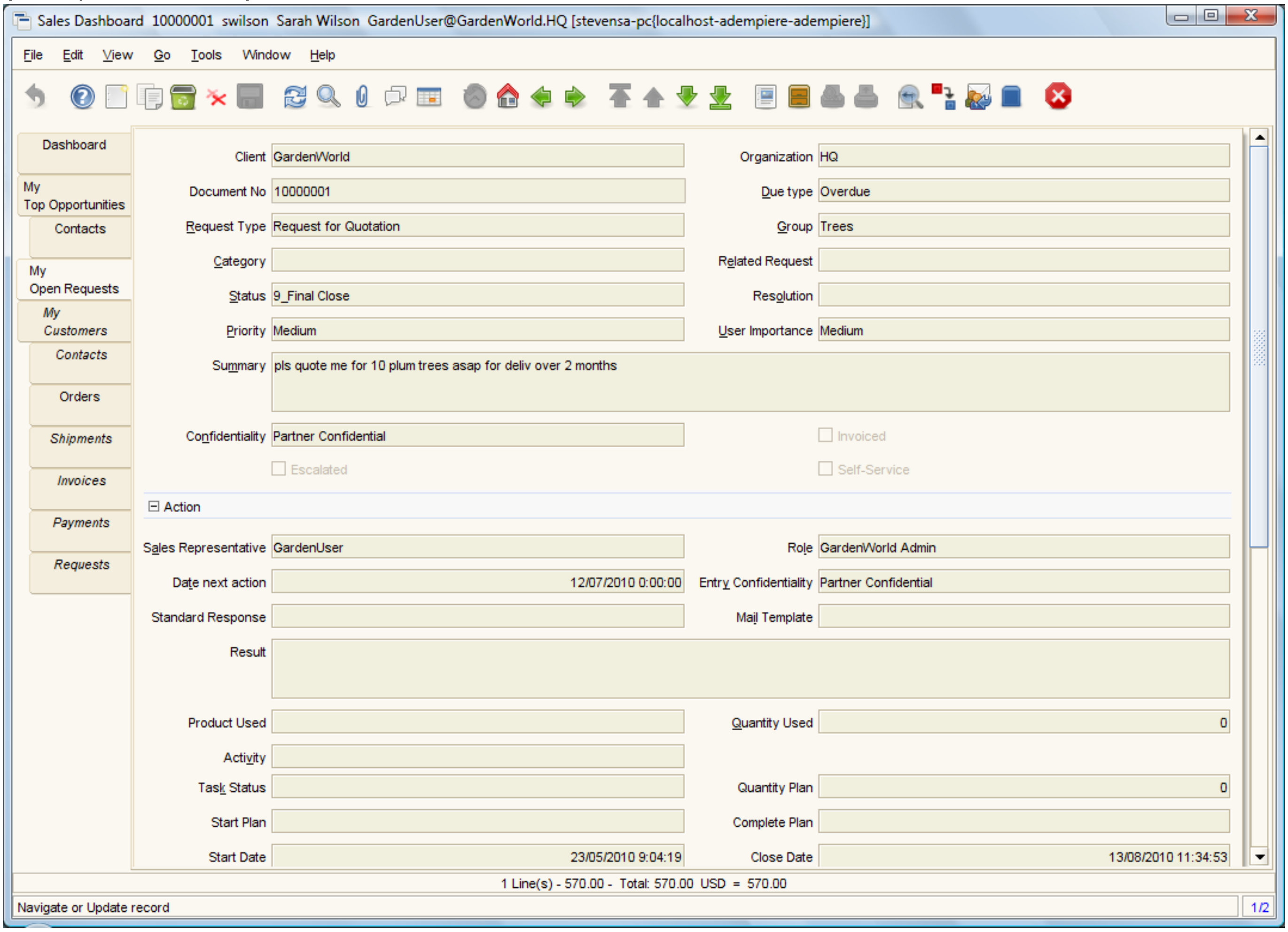
A ***Request*** is the ADempiere equivalent of a Ticket or a Case. It is a record that is created either by:

- 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.

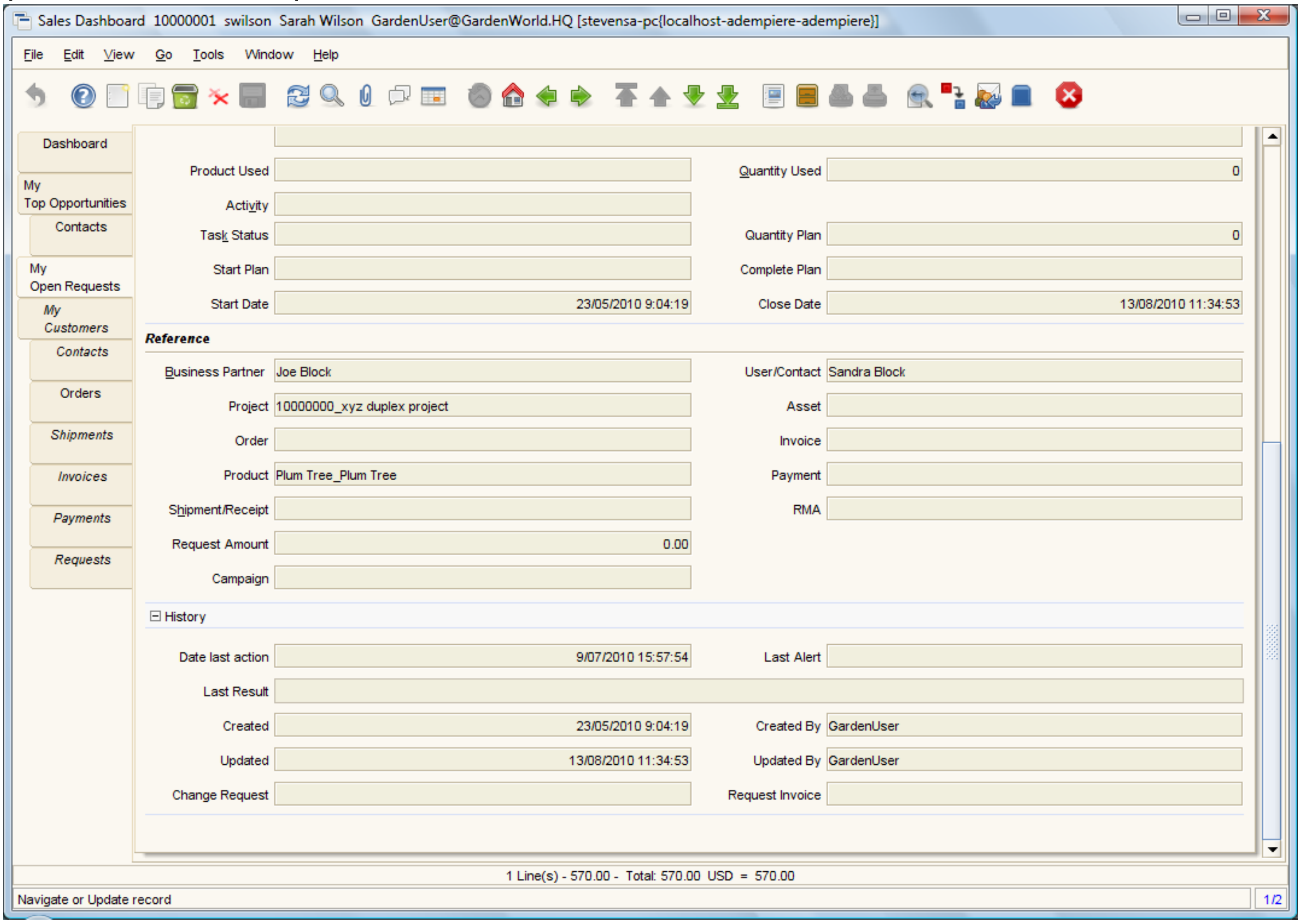
The Request is routed to a person or group of persons having a particular Role. Each stage in the life of the Request is logged with History records. The Request Processor will automatically create reminders and escalate to Management based on user-defined rules for that Request Type.

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)



(the bottom of the screen)



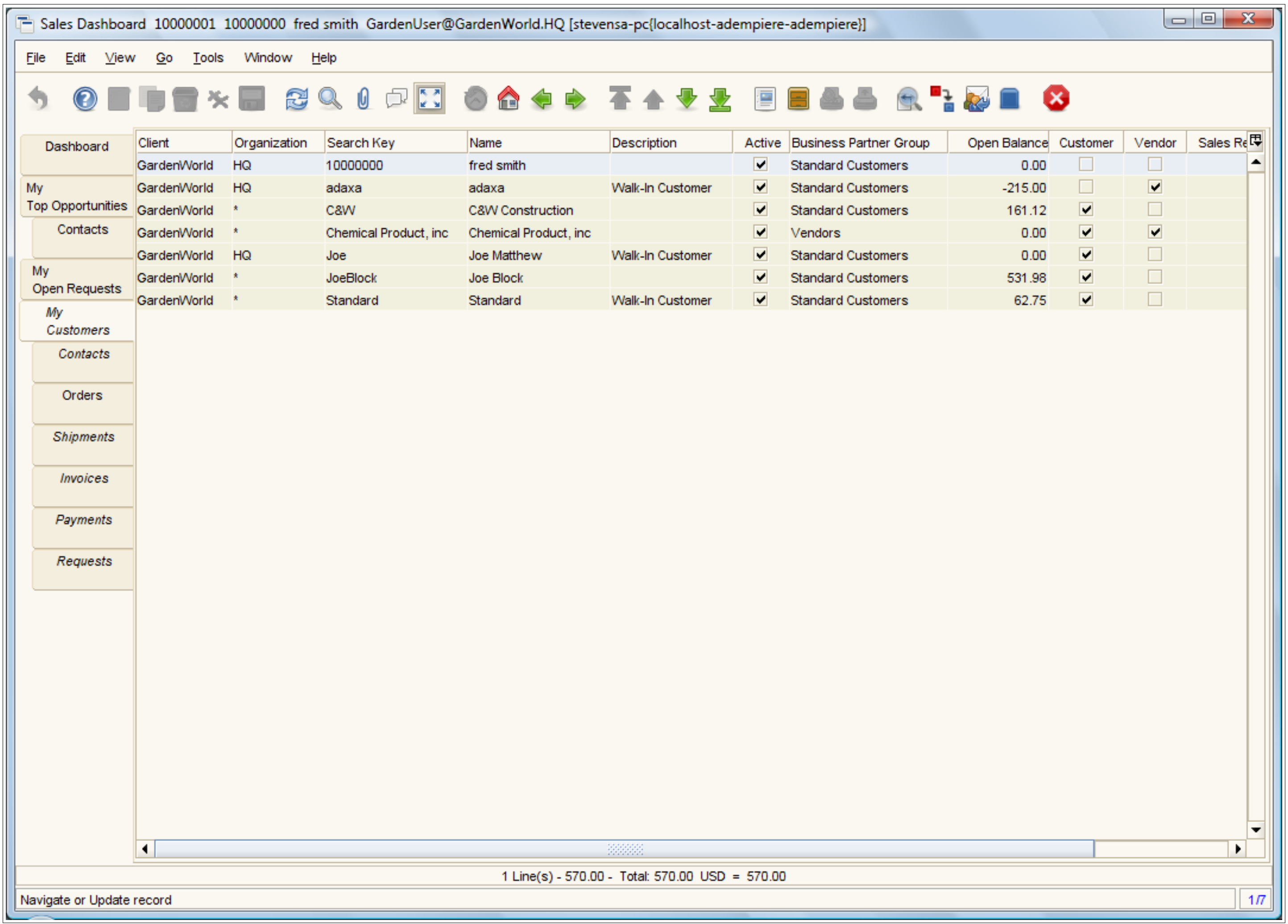
The above record does not display a lot of completed data but you can broadly see its function from the fields of data stored.

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:



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 an simply apply it over the top of the standard code so that changes are easily managed.

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NOTES