



Working with Dashboards

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1 Working with Dashboards

Dashboards are an element of the cockpit, which present easy-to-understand visualizations, such as bar or pie charts, of transactional data from the SAP Business One database. Depending on the dashboard, data can be presented either as time-specific static snapshots or as refreshable visualizations.

SAP delivers predefined dashboards for financials, sales, and service modules. In addition, SAP Business One partners and customers can create their own dashboards. For more information about predefined dashboards, see [Design, Behavior, and KPIs for SAP Predefined Dashboards](#). For more information about creating a dashboard, see [How to Develop Your Own Dashboards for SAP Business One](#) by following the link at <http://service.sap.com/smb/sbo/innovations>.

For information about installing the integration component, see [Administrator's Guide for SAP Business One](#) in the documentation area of SAP Business One Customer Portal at <http://service.sap.com/smb/sbocustomer/documentation>.

To work with the dashboard widget, the key user or administrator must ensure [the cockpit function and the dashboard widget](#) is successfully enabled. After that, the key user or administrator is responsible for the following tasks:

- [Importing partner-developed or company-developed dashboard packages](#)
- [Setting a user's authorization for dashboards](#)
- [Exporting dashboard packages](#)
- [Deleting dashboard packages](#)
- [Activating or deactivating dashboards](#)
- [Scheduling dashboard data refresh to improve dashboard performance](#)
- [Setting Up Dashboard Parameters](#)

For individual users, you can now start viewing and working with dashboards. You can either [view dashboards in SAP Business One](#), or [view dashboards using a Web browser](#).

More Information

[Working with the Cockpit](#)

1.1 Viewing Dashboards in SAP Business One

Depending on the dashboards that have been installed and the authorizations you have been granted, you can view SAP-defined dashboards for financial, sales, and service areas. In addition, your company can deploy dashboards created specifically for your company by SAP Business One partners or your internal IT staff.

Prerequisites

Your system administrator or key user has done the following:

- Installed the integration component for SAP Business One
- [Enabled the use of the cockpit and dashboards in SAP Business One](#)
- [Assigned the correct user authorization for dashboards](#)

Procedure

1. From the SAP Business One navigation panel on the left side of the window, under **My Cockpit**, select the cockpit you want to use.
The cockpit appears
2. In the navigation panel, choose **Widget Gallery** > **General Widgets**.
3. Click **Dashboards** and drag it into the open cockpit area.
A Dashboard window appears with a message about how to add a dashboard.
4. To add a dashboard to your cockpit, in the top right **Dashboard** widget window bar, choose **Tools**.
5. From the dropdown list, select **Settings**.
A **Select Dashboard** window appears, listing in alphabetic order the active dashboards which you have permission to view. For more information about activating a dashboard, see [Activating or Deactivating a Dashboard](#). For more information about assigning user authorizations for your dashboard, see [Setting Up User Authorizations for a Dashboard](#).

Note

If you do not have permission to view dashboards, if dashboards are not activated, or if no dashboards have been loaded into your system, you get the following error message: No dashboard available for you. Contact your system administrator.

6. To add one or more dashboards to the cockpit, select the appropriate checkbox.
7. If you select only one dashboard, that dashboard is the default dashboard. If you select two or more dashboards, to specify the dashboard that you want to appear by default whenever you log on to the cockpit, highlight the dashboard line and choose **Set as Default**. The default dashboard appears in bold font.
8. To confirm your choices, choose **OK**.
The default dashboard appears.

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[Monitoring Your Dashboards Using a Web Browser](#)

1.2 Monitoring Your Dashboards Using a Web Browser

You may want to monitor the business performance of your company without running the SAP Business One application. The Dashboard Web Portal lets you monitor your dashboards in a Web browser.

Prerequisites

Your system administrator or key user has done the following:

- Installed the integration component for SAP Business One.
For information about installing the integration component, see Administrator's Guide for SAP Business One.
- Installed a Web browser and ensured the Web connection.
Supported Web browsers include: Microsoft Internet Explorer (6–9), Google Chrome, and Mozilla Firefox.
- Enabled the cockpit function in SAP Business One. For more information, see [Enabling the Cockpit Function and the Dashboard Widget](#).

Procedure

1. For first-time use of the dashboard portal, from the SAP Business One **Main Menu**, choose **Administration** > **System Initialization** > **General Settings** and select the **Cockpit** tab.
2. Click the **Dashboard Web Portal** link.
The login page appears.
3. Specify the following fields:
 - **Company**: From the dropdown list, select one company database.
 - **Language**: From the dropdown list, select the language for the user interface. By default, the language is US English.
 - **ID**: Specify your user ID.
 - **Password**: Specify the password.
 - **Remember Settings**: Select this checkbox to let the browser remember all the above settings except your password.
4. Choose the **Login** button.
5. Select a dashboard.

Note
Make sure you have authorization to view the dashboard you select.

More Information

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1.3 Importing a Dashboard Package

Procedure

SAP Business One partners and your own IT department can develop industry-specific and company-specific dashboards and queries. To use these dashboard packages, you need to import them into SAP Business One.

1. From the SAP Business One navigation panel, choose **Modules** > **Administration** > **Setup** > **General** > **Dashboard Manager**.
2. In the **Dashboard Manager** window, choose the **Import** button.
The **Import Wizard** window appears.
3. To import a package of dashboards and related queries, choose **Next**.
4. In **Step 1** of the wizard, you select a dashboard package file in your file system. In the **Open** window, select the name of the dashboard package file (with .zip extension) and choose **Open**.
The name of the file appears in the **Dashboard Package** field.
5. To continue, choose **Next**.
Information about the dashboard package appears. This information is stored in the `info.xml` file in the dashboard package.
6. To continue to **Step 2** of the import wizard, choose **Next**.
7. If the dashboard package contains queries, the **Import queries in this package** checkbox is selected by default. If the dashboard package does not contain queries, you receive the message: *There are no queries in this package*. If a query in this package is linked to more than one dashboard, you receive the message: *A query cannot be linked to more than one dashboard*. Ensure that it is linked to one dashboard only.
A table containing the query category, name, and status appears.
8. To import the dashboards and queries in the package, choose the **Execute** button.
Step 3 of the import wizard appears. You receive one of the following:
 - Confirmation that the dashboards and queries were imported successfully.
 - Notification that the import failed and the reason for the failure.
9. To end the wizard, choose the **Close** button. If the import was successful, you can now set up user authorizations for the new dashboards in the package.

More Information

1.4 Setting Up User Authorizations for a Dashboard

Procedure

To assign user authorizations for a dashboard, proceed as follows:

1. From the SAP Business One navigation panel, choose ► **Modules** ► **Administration** ► **Setup** ► **General** ► **Dashboard Manager** ►.
2. In the **Dashboard Manager** window, from the menu on the left side, open a dashboard package and select a dashboard.
You can view information about the dashboard you selected.
3. To set a user's authorization for the selected dashboard, choose **Define User Authorizations** .
The **Authorizations** window in SAP Business One appears.
4. Select the user, locate the dashboard in the **Dashboards** folder in the permission tree, and assign an authorization for the user: **Full Authorization** or **No Authorization** .
5. To save the change, choose the **Update** button.

1.5 Exporting a Dashboard Package

Procedure

To modify existing dashboards in SAP Business One or to use an existing dashboard to create a new dashboard, you can export a dashboard package to your computer, modify one or more dashboards in the package or create new dashboards, and then import the modified or new dashboard package to SAP Business One.

1. From the SAP Business One navigation panel, choose ► **Modules** ► **Administration** ► **Setup** ► **General** ► **Dashboard Manager** ►.
2. In the **Dashboard Manager** window, from the menu on the left side, select a dashboard package.
Information about the dashboard package you selected appears on the right side of the window.
3. To start the export of the dashboard package, choose the **Export** button.
The **Export Package** window appears.
4. Accept the default file location and file name or specify a different location and file name.
The file extension must be `.zip`.
5. To complete the export, choose the **Save** button.
SAP Business One confirms the export of the dashboard package to the specified location in your file system.

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1.6 Deleting a Dashboard Package

Procedure

If a dashboard package is no longer relevant for your company, you can delete it. If a newly created or modified dashboard in a dashboard package has errors that you need to correct, you must delete the dashboard package, correct the errors, and then import the changed dashboard package.

Note

You cannot delete an SAP-defined dashboard package.

You cannot delete a single dashboard; you must delete the dashboard package.

1. From the SAP Business One navigation panel, choose ► **Administration** ► **Setup** ► **General** ► **Dashboard Manager** ►.
2. In the **Dashboard Manager** window, from the menu on the left side, select a dashboard package.
Information about the dashboard package you selected appears on the right side of the window.
3. To start the deletion of the dashboard package, choose the **Delete** button.
A message appears asking you to confirm that you want to delete the package.
4. Do one of the following:
 - To confirm the deletion, choose **Yes** .
You receive a confirmation that the deletion was successful.
 - To cancel the deletion and return to the **Dashboard Manager** window, choose **No** .

Note

If you have chosen a dashboard from the deleted dashboard package as your default dashboard, you receive the following message when trying to add the dashboard to the cockpit: *The default dashboard is not available. Contact your system administrator.* This message also appears if your permission for the dashboard package is revoked or if the dashboard is set as **Inactive** .

More Information

1.7 Activating or Deactivating a Dashboard

Procedure

A dashboard package contains one or more dashboards and queries. If you want to let users view some, but not all, the dashboards in a package, you can activate or deactivate individual dashboards as required, either those developed by SAP or ones developed by a partner or your IT staff. You can achieve the same result by adding or removing each user's authorization for each dashboard, but activating or deactivating is faster and easier.

1. From the SAP Business One navigation panel, choose ► **Modules** ► **Administration** ► **Setup** ► **General** ► **Dashboard Manager** .
2. In the **Dashboard Manager** window, from the menu on the left side, select a dashboard package.
Information about the dashboard package you selected appears on the right side of the window.
3. To activate or deactivate the selected dashboard, from the **Status** dropdown list, select the appropriate status, either **Active** or **Inactive** .
4. To save the change, choose the **Update** button.

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1.8 Scheduling a Daily Data Refresh for Dashboards

Procedure

Each time a user opens a dashboard, SAP Business One loads and displays the latest data in real time. For data-intensive dashboards, such as **Sales Analysis** and **Customer Receivables Aging** , this can impact system performance. As your database grows or the number of employees who use dashboards increases, you may also notice a decrease in the performance of dashboards. During peak usage time, when users navigate from one dashboard to another and thus cause the dashboard to reload real-time data, they may report delays of several minutes or more. To minimize the impact on system performance during peak business hours, the system administrator can choose to change the data reload from real time to a scheduled data reload. In addition to the automatic data refresh settings you make here, a user can also refresh data in real time while viewing a dashboard by choosing the **Refresh Data** button in the dashboard. However, this user-triggered data refresh is not available for the **Service Call Status** dashboard and the **Cash Flow** dashboard.

Note

After you enable the data cache and the scheduled daily data refresh, the settings here apply to all dashboards which support scheduled refresh, including the SAP-defined dashboards and the imported ones.

For SAP-defined dashboards, the settings would impact only the **Sales Analysis** and the **Customer Receivables Aging** dashboards. The **Service Call Status** dashboard and the **Cash Flow** dashboard, for which data is always refreshed every 60 minutes, would not be affected.

To enable and schedule a daily data refresh for a dashboard, proceed as follows:

1. From the SAP Business One navigation panel, choose ► **Modules** ► **Administration** ► **Setup** ► **General** ► **Dashboard Manager** .
2. In the **Dashboard Manager** window, from the menu on the left side, select a dashboard package.
Information about the dashboard package you selected appears on the right side of the window.
3. To enable the scheduled data refresh function for dashboards, choose the **Data Refresh Settings** button.
The **Data Refresh Settings** window appears. By default, the data cache and the data refresh settings are disabled.
4. To enable the server cache, choose the **Enable Data Cache** checkbox.
The data refresh settings are enabled for data entry.
5. To set the time of day at which you want the data refresh to start, on the right of the **Refresh Data At** column, select one or more checkboxes to schedule your daily data refresh. To select or deselect all the 24 checkboxes that correspond to the 24 hours of a day, click the column header area.

Note

If you do not make any changes after you select the **Enable Data Cache** checkbox, the default setting is used: refresh data at 00:00 every day.

6. To save the data refresh settings, choose the **OK** button.
You receive a message that the operation was successful, and the window is closed.
If you select the **Enable Data Cache** checkbox and you do not select any checkbox for daily refresh time settings before you choose **OK** , you receive the following message: To define the daily refresh times for the dashboard, select one or more checkboxes.

Note

To enhance the performance of dashboards, only displayed data would be cached when you choose to enable the data cache. This means that the data in unloaded sub-charts of a dashboard would not be cached. Therefore, when you load dashboards before the first automatic data refresh takes place, you may note data inconsistencies between the sub-chart data and the main chart data. To solve this issue, you can choose the **Refresh Data** button or wait until the next automatic data refresh finishes.

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Working with Dashboards

1.9 SAP Predefined Dashboards

Dashboards delivered in the integration component of SAP Business One are based on SAP Business One standard functionality and the demo database set up for OEC, the demo company. You may need customization help depending on your implementation of the SAP Business One application and data range requirements. For information about creating dashboards, see the how-to guide [How to Develop Your Own Dashboards for SAP Business One](#) by following the link at <http://service.sap.com/smb/sbo/innovations>.

SAP predefines the following dashboards:

- [Customer Receivables Aging Dashboard](#)
- [Sales Analysis Dashboard](#)
- [Service Call Status Dashboard](#)
- [Cash Flow Forecast Dashboard](#)
- [Purchase Quotations Dashboard](#)

1.9.1 Customer Receivables Aging Dashboard

The [Customer Receivables Aging](#) dashboard lets a finance manager review accounts receivables and identify current or potential problems. This dashboard provides an overall analysis of a company's accounts receivables collection efforts and the status of key accounts.

Customer Receivables Aging: Dashboard Structure and Behavior

This dashboard has two sections:

- The upper part provides an aging overview and an analysis of either overdue receivables or future remittances.
- The lower part displays an analysis of overdue receivables or future remittances for the top five customers or sales employees.

All the amounts in the dashboard are given in the local currency, which is displayed under the title bar on the right side. In the lower part of the dashboard, you can use the dropdown list to switch the analysis from [Customers](#), which is the default, to [Sales Employees](#). By default, details for the top customer or sales employee are displayed on the right side of the lower part. To display the details for another customer or sales employee, in the bar chart, click the bar for the customer or sales employee for which you want to view detailed information. For more information about the data refresh options and settings, see [Scheduling Daily Data Refresh for Dashboards](#).

Customer Receivables Aging: Dashboard Behavior Details

The balance due for a customer, a sales employee, or a specific aging interval should be a positive value. A negative value is not shown correctly in the dashboard. To enable values to be displayed correctly in the dashboard, before displaying the dashboard you must first reconcile credit memos and any other documents that result in a negative value. When you select the [Customer Receivables Aging](#) dashboard, it displays the default time interval, which is [90+ Days](#). If there is no data for this time interval, the display does not default to another time interval. Instead, the dashboard appears as follows:

- In the [Overdue Analysis](#) line chart, the [Overdue Total](#) line appears with data; the [90+ Days](#) line displays a zero value.
- In the [Overdue Analysis by Customers](#) or [Overdue Analysis by Sales Employees](#), no [Top 5 Customers](#) or [Top 5 Sales Employees](#) bar chart appears.
- In the [Aging Versus Revenue](#) line chart, the [90+ Days](#) line displays a zero value. There is no [Overdue Total](#) and [Revenue](#).

The default selection of the top-ranked customer or the top-ranked sales employee is realized only at initialization of the dashboard ("at initialization" refers to selecting a new dashboard or clicking a different aging interval for the first time after opening the first dashboard). If you change the selected aging interval to a different interval and then return to the previously selected aging interval, the default display of the top-ranked customer or top-ranked employee in the [Aging Versus Revenue](#) line chart does not occur. This also happens when you change the default display of [Overdue Analysis by](#) from [Customers](#) to [Sales Employees](#). This may result in no data being displayed in the [Aging Versus Revenue](#) and [Future Remit Versus Sales Opportunities](#) line charts.

Example

The dashboard shows the [Top 5 Customers \(31-60 Days\)](#) bar chart and the [Aging Versus Revenue](#) line chart. For both charts, data for the top-ranked customer is shown. To display the second-ranked customer, you click the bar chart for the second-ranked customer. Both charts now display data for the second-ranked customer. Now you change the [Overdue Analysis by](#) from [Customers](#) to [Sales Employees](#). The bar chart displays up to five top sales employees, depending on the data available. The [Aging Versus Revenue](#) line chart displays data for the second-ranked sales employee (the expectation is that data for the top-ranked sales employee is displayed). However, if there is only one "top" sales employee (one bar in the [Top 5 Sales Employees \(31-60 Days\)](#) bar chart), no data is displayed in the [Aging Versus Revenue](#) line chart because there is no data for the second-ranked sales employee. In this example, the line chart retains the ranking value (second-ranked) from the previously displayed line chart.

Example

The dashboard shows the [Top 5 Customers \(31-60 Days\)](#) bar chart and the [Aging Versus Revenue](#) line chart. For both charts, data for the top-ranked customer is shown. First you display the second-ranked customer by clicking the bar chart for the second-ranked customer. The line chart displays data for the second-ranked customer. Now you select a different aging interval by clicking the relevant time slice in the [Aging Overview](#) pie chart. For the new aging interval, the bar chart displays up to five top customers, depending on the data available. The [Aging Versus Revenue](#) line chart displays data for the top-ranked customer. Then you change the aging interval back to [31-60 Days](#). The dashboard shows the [Top 5 Customers \(31-60 Days\)](#) bar chart. The [Aging Versus Revenue](#) line chart displays data for the second-ranked customer (the expectation is that data for the top-ranked customer is displayed). See also the example above.

Customer Receivables Aging: Company Overview

In the [Customer Receivables Aging](#) dashboard, the [Aging Overview](#) chart provides the percentage of overdue customer receivables for specific time intervals. It controls the time interval for the other charts in the dashboard and lets you switch between the [Overdue Analysis](#) and [Future Remit Analysis](#).

Type and Display	Behavior	KPI
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Chart showing aging total and percentage distribution of customer receivables by time interval and future remittances	90+ Days is the default time interval for the other charts in the dashboard. (Overdue Analysis , Top 5 Customers <time period> , Top 5 Sales Employees <time period> and Aging Versus Revenue). To change the time interval, click one of the <n> Days segments in the chart.	The KPI is the percentage of the amount due for each time interval. Data comes from the Customer Receivables Aging report.
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Overdue Analysis: Company Overview

This chart provides a historical analysis of customer receivables for the time interval you selected in the **Aging Overview** chart.

Type and Display	Behavior	KPI
Two-line chart showing the trend of a company's overdue accounts receivables total and overdue accounts for the time interval selected in the Aging Overview chart. The Overdue Total line is always displayed.	Changing the time period in the X axis refreshes the Overdue Total and <n> Days lines. To change the time period displayed in the X axis, from the View by dropdown list select one of the following options: <ul style="list-style-type: none"> Last 6 Months: 6 months from current month (default) Last 12 Months: 12 months from current month The default time interval is 90+ Days. To change the time interval for the Overdue Total and <n> Days lines, in the Aging Overview chart click one of the <n> Days segments. To view the future remittances analysis, in the Aging Overview chart, click the Future Remit segment.	Amount for the current month is from the Customer Receivables Aging report with the Aging Date and Posting Date set to the current date. Amount for previous months is from the same report when the Aging Date is set to the ending date of the previous month.

Overdue Analysis: Customer and Employee Details

Overdue Analysis by Customers and **Overdue Analysis by Sales Employees** list the top five accounts and provide a historical analysis of aging receivables versus revenue.

From the dropdown list, you select **Customers** or **Sales Employees** .

Chart	Type and Display	Behavior	KPI
Top 5 Customers Top 5 Sales Employees	Bar chart with overdue receivables for each of the top five customers or sales employees for the selected time interval in the Aging Overview chart	To display the KPIs on the right side of the chart for a different customer or employee, click the bar for the desired customer or employee. To change the time interval, in the Aging Overview chart click one of the <n> Days segments. To view the future remittances analysis, in the Aging Overview chart, click the Future Remit segment.	The overdue amount for each customer or sales employee is from the Customer Receivables Aging report.
Aging Versus. Revenue	Two-line chart (Overdue Total , <n> Days) overlaying the Revenue area	For information about the behavior in this chart, see Overdue Analysis: Company Overview .	Overdue Total is Balance Due minus Future Remit in the Customer Receivables Aging report. The selection criteria are: <ul style="list-style-type: none"> Currency : Local Aging Date : Current Date Age By : Due Date Revenue is derived from the selection criteria for the Sales Analysis report. The document should be Invoices . Posting Date is from the beginning of the selected horizon to the current date. Invoice-related documents and localization A/R documents that impact the revenue account, such as credit memo, A/R invoice exempt, A/R debit memo, A/R bill, A/R exempt bill, A/R export invoice, A/R correction invoice, A/R correction invoice reversal, and A/R reserve invoice, are also considered.

Future Remit Analysis: Company Overview

Type and Display	Behavior	KPI
Bar chart showing future remittances for a selected time period	To change the time period displayed in the X axis, from the View by dropdown list, select one of the following options: <ul style="list-style-type: none"> Next 4 Weeks : 4 weeks from next week (default) Next 12 Weeks :12 weeks from next week Next 6 Months :6 months from next month The number of the week is taken from the SAP Business One 8.81 calendar. To view the overdue analysis, in the Aging Overview chart, click one of the <n> Days segments.	The future remittance amount for each time period comes from the Customer Receivable Aging report, where Aging Date is set to the end of each week or month.

Future Remit Analysis: Customer and Employee Details

Chart	Type and Display	Behavior	KPI
Top 5 Customers (Future Remit) Top 5 Sales Employees (Future Remit)	Bar chart and future remittance amount for each of the top five customers or sales employees	To display the KPIs on the right side of the chart for a different customer or employee, click the bar for the desired customer or employee.	The future remittance amount for each time period comes from the Customer Receivables Aging report; Aging Date is set to the end of each week or month.
Future Remit Versus Sales Opportunities	Clustered bar chart comparing future remittances versus sales opportunities	For information about the behavior in this chart, see Future Remit Analysis: Company Overview.	The query for sales opportunities is based on the selection criteria for the Opportunities Forecast Over Time report.

More Information

[Design, Behavior, and KPIs for SAP Predefined Dashboards](#)

1.9.2 Sales Analysis Dashboard

The **Sales Analysis** dashboard lets a sales manager understand sales performance and the status of the company's most important customers and employees. The dashboard KPIs are based on the standard functions of SAP Business One. Below are assumptions of the sales processes of OEC, the demo company:

- The sales quota is maintained in the budget of the sales revenue account by month.
- The sales process starts with opportunity creation and ends with invoice creation. Only the invoiced amount is revenue realized. Canceling an invoice or creating a credit memo impacts the revenue of the month in which the cancellation or credit is posted.
- If an opportunity is lost, the sales employee changes the opportunity status to **Lost**.

Sales Analysis: Dashboard Structure and Behavior

The **Sales Analysis** dashboard has two sections:

- The upper part provides an overview of sales performance.
- The lower part displays detailed information about the top five customers or sales employees.

All the amounts in the dashboard are given in the local currency, which is displayed under the title bar on the right side. In the lower part of the dashboard, you can use the dropdown list to switch the analysis from **Customers**, which is the default, to **Sales Employees**. By default, details about the top customer or top employee are displayed on the right side of the lower part. To display the details for another customer or employee, click the bar for the customer or employee for which you want to view detailed information. For more information about the data refresh options and settings, see [Scheduling a Daily Data Refresh for Dashboards](#).

Sales Analysis: Company Overview

The upper general sales performance part covers four KPIs: sales amount by month, last year's sales amount by month, sales quota, and sales opportunity win rate.

Chart	Type and Display	KPI
Fiscal Year Analysis	Bar chart showing revenue for the current year and the previous year (Sales Amount and Last Year's Sales Amount); line for Quota . For all months, the sales amount for last year is shown; for previous months and the current month, the sales amount for the current year is shown.	The sales amount calculation is based on invoice amount and grouped by posting calendar month. The calculation logic is the same as for the Sales Analysis report. Invoice-related documents and localization A/R documents that impact the revenue account are also considered. Quota uses the budget definition of revenue account, which is the first budget scenario defined for one fiscal year. Make sure the revenue account has an account type of Sales and is on the credit side.
Opportunity Win Rate	Line chart showing the ratio of won opportunities to total closed opportunities for the period. Two lines are shown: one line for previous year, one line for current year to date.	The chart compares the current year's win rate to the previous year's rate by month. For each displayed month, the win rate equals the number of won opportunities in this month divided by the total number of closed opportunities (including won and lost) in this month. Closed opportunities include opportunities with status Won or Lost . Closing date refers to opportunity Closing Date .

Sales Analysis: Customer and Employee Details

Chart	Type and Display	Behavior	KPI
Top 5 Customers Top 5 Sales Employees	Clustered bar chart (one for sales amount and one for gross profit) for each of the top five customers or employees	To display the KPIs on the right side of the chart for a different customer or employee, click the bar for the desired customer or sales employee.	Year-to-date sales amount and gross profit of top five customers or top five employees are displayed as a clustered bar chart.

<p>Item Rankings</p> <p>Customer Rankings</p>	<p>Table with top five items (for Customers selection) and top five customers (for Sales Employees selection) sorted by sales amount.</p>	<p>To display the KPIs for a different customer or employee, in the Top 5 Customers or Top 5 Sales Employees chart click the bar for the desired customer or sales employee.</p>	<p>For selected customer: Top five items by each item's sales amount for the current fiscal year. Revenue : Current fiscal year revenue of the item % : Percentage this item contributes to the customer's total sales amount Quantity : Number or quantity of the item sold to the customer (by inventory unit of measure) For selected sales employee: Top five customers by customer's sales amount for the current fiscal year. Revenue : Current fiscal year revenue of the customer % : Percentage this customer contributes to total sales for this sales employee Profit : Current fiscal year gross profit for customer related to this sales employee</p>
<p>Opportunities Status</p>	<p>Pie chart</p>	<p>None</p>	<p>Depending on the selection in the dropdown list (Customers or Sales Employees), the number of opportunities by status for the fiscal year to date for the selected customer or selected sales employee.</p>

More Information

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1.9.3 Service Call Status Dashboard

The **Service Call Status** dashboard lets a service manager identify current and potential problems with service call responsiveness. This dashboard presents key performance indicators that provide different views of service calls being handled by your employees. It shows the overall service call status by number of new service calls for the current date, backlog trends, and call status. For each service queue the dashboard shows the service call workload and status by employee.

Service Call Status: Dashboard Structure and Behavior

The **Service Call Status** dashboard has two sections:

- The upper part provides a company overview.
- The lower part displays detailed information about a selected service queue.

By default the data is refreshed every 60 minutes. When you select a different service queue name from the dropdown list in the lower part of the dashboard, the data in the lower part is refreshed for the selected service queue. The service queue names displayed in the company overview section and in the dropdown list are taken from the description field of the queue setup. By default, the order of the display in the dropdown list is the order in which the queues were set up.

Service Call Status: Company Overview

The upper company overview covers KPIs that inform the service manager about new service calls for the current day, any calls due today or overdue calls, and the trend of service calls for a specific time period.

Chart	Type and Display	Behavior	KPI
<p>Incoming Calls Today</p>	<p>Pie chart with total number of today's new service calls by service queue</p>	<p>None</p>	<p>Service call with Created On date equal to current date</p>
<p>Calls to Close</p>	<p>Pie chart with in-process service calls grouped by category of due date</p>	<p>None</p>	<ul style="list-style-type: none"> • Overdue : Service call with Resolution By date before the current date • Due by Today : Service call with Resolution By date equal to the current date • Others : Service call with Resolution By date after the current date and service call with no Resolution By date
<p>Backlog of <time period selection></p>	<p>Line chart with a line for each service queue showing the trend of the service call backlog for the selected time period and predefined maximum and minimum number of calls for reference</p>	<p>From Backlog of dropdown list, user selects a time period. Last 7 Days is the default. The number of backlog calls for each service queue is refreshed, the lines are repositioned, and the X axis changes as follows:</p> <ul style="list-style-type: none"> • Last 7 Days : Dates of last 7 days including today 	<p>The backlog of calls is the number of in-process service calls at the end of each day. For example, if a user selects Last 4 Weeks or Last 6 Months, the backlog is the in-process service calls for the last day of each time period.</p>

		<ul style="list-style-type: none"> • Last 4 Weeks : Last 4 calendar weeks including the current week • Last 6 Months : Last 6 calendar months including the current month 	
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Service Call Status: Service Queue Details

The lower queue part covers two queue-specific KPIs:

- Service call assignment (employee workload)
- Service call turnover

To display a queue, the user selects an option from the **Details of** dropdown list.

Chart	Type and Display	Behavior	KPI
Call Assignment	Bar chart in which each bar represents a service employee assigned to the service queue. Each bar displays the total number of service calls assigned to an employee. Color coding shows service calls that are overdue, due today, and due in the future or those without a due date.	None	Number of in-process calls assigned to each member of the selected service queue. Each call is classified as Overdue, Due by Today, and Others. Unassigned service calls are combined in the Not Assigned bar. For information on the coding, see the Calls to Close: n> row in Service Call Status: Company Overview
Call Turnover of time period selection>	Line chart with a line for new service calls and a line for closed service calls for the selected time period over a gray area representing call backlog as reference.	From the Call Status of dropdown list, the user selects a time period. For information about the behavior in this chart, see the Backlog of time period selection> row in Service Call Status: Company Overview.	New service calls and closed service calls jointly show service call turnover. A new service call is created during the displayed time period, regardless of status. A closed call is a service call that is closed during the displayed time period, regardless of when it was created. Create date refers to a service call's Created On date. Close date refers to a service call's status of Closed and a Closed On date within the displayed time period.

More Information

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1.9.4 Cash Flow Forecast Dashboard

The **Cash Flow Forecast** dashboard lets a finance manager forecast a company's future cash on hand based on transaction documents, projected postings, journal vouchers, and recurring postings. This dashboard presents cash account details that let you arrange payments in advance. It shows large incoming and outgoing transactions of a period according to your definition and helps you to identify key payments and business partners.

The **Cash Flow Forecast** dashboard has the following two tabs:

- **Cash Flow Forecast Overview**

Use this tab to monitor the general incoming/outgoing amount and the opening balance for the selected period.

- **Cash Flow Details**

Use this tab to view large incoming and outgoing transactions as well as related business partners.

To view this tab, on the **Cash Flow Forecast Overview** tab, click the chart section of the specific time period you want to view. The **Cash Flow Details** window appears, displaying detailed information of the selected time period. To return to the **Cash Flow Forecast Overview** tab, on the **Cash Flow Details** tab, choose the **Overview** link.

Cash Flow Forecast Overview

The **Cash Flow Forecast Overview** tab presents a bar-line combination chart showing the same data as in the **Cash Flow Report**. Working with this chart typically involves the following operations:

- Observe cash flow trends:
 - **Incoming amount**: shown as the deep blue bars, representing the incoming payments amount received from a customer or an account.
 - **Outgoing amount**: shown as the light blue bars, representing the outgoing payments amount issued to a vendor or an account.
 - **Opening balance**: shown as a dotted line. Each dot represents the opening balance of the corresponding time point. The opening balance of a day equals the closing balance of the previous day, as shown in the **Cash Flow Report** (the **Balance** column).
 - **Numbers**: Below the chart, three numbers display the real-time data of incoming amount, outgoing amount, and opening balance. The numbers are refreshed when you move your mouse over different time periods.
 - **Traffic Light Indicators**: There are indicators (different color dots) displayed before the time points on the horizontal axis of the charts. The colors indicate the following situations:
 - **Green**: optimistic situation, when you have sufficient cash flow on hand.
 - **Yellow**: poor situation, when you do not have enough cash flow on hand and you need to be cautious in balancing your accounts.
 - **Red**: dangerous situation, when you have inadequate cash flow on hand and urgently need to balance your accounts.

i Note

SAP predefined the indicator thresholds in the **Dashboard Parameters** window. To change the thresholds, see **Configuring Dashboard**

Parameters , below.

- Add data sources:
To add additional data sources for the cash flow forecast, select or deselect the **Journal Vouchers** and the **Recurring Postings** checkboxes above the chart, as necessary.
- Switch time intervals:
In the **View by** dropdown list, choose to view by **Day** , **Week** , or **Month** .

i Note

The week and month do not refer to calendar weeks and months. The definitions for week and month are in accordance with the logic of the **Cash Flow Report** .
SAP predefined the number of days/weeks/months displayed in the chart. To change the settings, see **Configuring Dashboard Parameters** , below.

- View today's account details:
To do so, choose the **Account Details** link below the chart. All the **Cash** , **Credit Card** , and **Checks** accounts are displayed with the balance data of the current system time.

i Note

In the following localizations, **Bill of Exchange (BOE)** is also displayed: Belgium, Brazil, Chile, China, France, Italy, Japan, Korea, Portugal, and Spain.

- Drill down to view period details:
To view detailed information for a certain time period, click the chart section of that time period. The **Cash Flow Details** tab appears, displaying the account details for the specified period of time.

Cash Flow Details

The **Cash Flow Details** tab contains a table showing large transaction details and a pie chart presenting the major business partner or employee involved in the transactions; this helps you identify key payments and partners.

- Large Transactions Table:
The table displays all transactions with an amount that is larger than the defined threshold. By default, any transaction larger than 5000 (in local currency) is displayed. You can change this definition in the **Dashboard Parameters** window. For more information, see **Configuring Dashboard Parameters** , below.
- Pie Chart:
You can view the pie chart either by **Incoming Amount** or **Outgoing Amount** . After you select the data source, you can choose to view the chart either by business partner or by sales employee, so as to observe the involvement of key business partners and sales employees.
By default, the chart displays 5 business partners/employees, and the data of all the other business partners or employees are grouped and displayed as **Others** . You can change the settings in the **Dashboard Parameters** window. For more information, see **Configuring Dashboard Parameters** , below.

Configuring Dashboard Parameters

The **Cash Flow Forecast** dashboard uses the dashboard parameters to enable user customization of the dashboard configuration.

To change the default settings, proceed as follows:

1. To open the **Dashboard Parameters** window, from the SAP Business One **Main Menu** , choose ► **Administration** ► **Setup** ► **General** ► **Dashboard Parameters** .
2. In the **Dashboard Parameters – Setup** window, press **Ctrl** + **F** to switch to **Find** mode.
3. In the **Code** field, enter **CFC** and choose **Find** . The **Cash Flow Config** parameter set appears.
4. In the **Value** column, change the parameter values if necessary.

The following table explains the parameters for this dashboard.

Parameter Name	Function	Definition
No. of Days/Weeks/Months	Defines the number of time points (days/weeks/months) displayed on the horizontal axis of the Cash Flow Forecast Overview chart.	Enter an integer from 3 to 14. If you define a value larger than 14, the dashboard displays only 14 time periods and the following message appears: Dashboard displays no more than 14 days/weeks/months from today on. If you enter a number with decimals, the decimals are rounded off automatically in counting the days/weeks/months.
No. of BPs/Employees	Defines the number of BPs/employees displayed in the pie chart in the Cash Flow Details window.	Enter an integer value no larger than 5. If you define a value larger than 5, the dashboard displays only 5 BPs/employees and the following message appears: Dashboard displays no more than 5 BPs/employees. If you enter a number with decimals, the decimals are rounded off automatically in counting BPs/employees.
Red/Yellow	Defines the threshold for the traffic light indicators. The value here stands for the ratio of opening balance to outgoing amount. In the Cash Flow Forecast Overview chart, if the ratio of a certain time period is: <ul style="list-style-type: none"> • No greater than the value defined for red, the traffic light indicator is red. • Greater than the value defined for red, but smaller than the value defined for Yellow , the 	By default, the threshold for the red indicator is 1 and that for the yellow indicator is 1.2. Change the ratio threshold if necessary.

	<p>traffic light indicator is yellow.</p> <ul style="list-style-type: none"> No smaller than the value defined for yellow, the traffic light indicator is green. 	
Large Transaction Amount	<p>Defines the large transaction threshold. All transactions no smaller than the threshold value are displayed in the large transactions table of the Cash Flow Details window.</p>	<p>Enter a positive number. If you enter a number with decimals, the decimals is rounded off automatically in calculation.</p>

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1.9.5 Purchase Quotations Dashboard

Use the **Purchase Quotations** dashboard to monitor open purchase quotations. With the filter, you are able to view open purchase quotations by selected vendor, item, buyer, and valid date. With the dashboard, you can view how vendors have responded to your quotations. For responded quotations, you can proceed to compare quotations and close quotations.

The **Purchase Quotations** dashboard presents a pie chart displaying the open purchase quotations for a certain time range. Working with this chart typically involves the following operations:

- View Quotation Status**
 - Responded**: If a quotation has a full response from the required vendor (with all items quoted with quantity and unit price), then this quotation is defined as **Responded**.
 - Partial/No Response**: If a quotation does not have a full response from the vendor (with one or more items not quoted), then this quotation is defined as **Partial/No Response**.
 - Overdue**: Quotations with a **"Valid Until" No Later Than** date that is earlier than the current system date.

To view detailed information, click the pie chart segment. The **Purchase Quotations Details** window appears, displaying a list of relevant purchase quotations. You can find the following information in the table: document number, supplier name, supplier telephone number, reference number, and valid date information.

i Note

You cannot display the **Purchase Quotations Details** window for the same pie chart segment again right after you close the window. To display the details of the same segment, for example, the **Responded** segment, you click another segment, close the **Purchase Quotations Details** window, then click the **Responded** segment.

- Filter Data by Valid Date**

The dashboard lets you filter open purchase quotations by expiration date. To do so, in the **"Valid Until" No Later Than** field, choose a date. All purchase quotations that expire before the date you specify here are presented in the chart.

i Note

If you specify a date earlier than the current system date, all the displayed purchase quotations are overdue quotations.

- View Data of Selected Vendors/Items/Buyers**

By default, the dashboard displays the data of all open purchase quotations (including overdue purchase quotations). You can use the filter to view the data for selected vendors, items, and buyers. To do so, proceed as follows:

- In the **Choose Scope** dropdown list, choose to view data by **Vendor**, **Item**, or **Buyer**.
- In the **Choose Group** dropdown list, choose a group. The dashboard displays open purchase quotations for the specified vendor/item/buyer group.
- If you want to proceed to view data of a specific vendor/item/buyer, in the **Choose** dropdown list, choose a vendor/item/buyer. The dashboard displays open purchase quotations for the selected vendor/item/buyer only.

More Information

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1.9.6 Inventory Counting Recommendation Dashboard

The **Inventory Counting Recommendation** dashboard enables managers to have a comprehensive view of the current status of the company warehouses as regards inventory counting execution. It analyzes the values of warehouses, and recommends the start of inventory counting process in certain warehouses according to user-defined rules.

The dashboard comprises the following two reports:

- Warehouse Valuation Report
- Inventory Counting Risk Assessment Report

In addition, a section in the lower left part of the dashboard displays last count date, last counted warehouse, and the days since last count.

i Note

The **Last Count Date** field displays the count date that appears in the latest inventory counting document or inventory posting document that is not based on an inventory counting document. The same logic applies to the **Last Counted Warehouse** field and the **Days Since Last Count** field.

Warehouse Valuation

This report appears in the upper part of the dashboard. It presents the warehouses' value according to the items' value, which is calculated by the selected price source or according to the items' quantities.

The bar chart displays only the top 10 warehouses with the highest total value or total quantity.

Field and Chart Series	Description
Source Price List for Item Value	Select a source price for the calculation of the items' value from the dropdown list. This field is disabled when you choose to valueate warehouses by quantity.
Warehouse Valuation by	Choose to valueate warehouses by Item Value or Quantity .
Relative Count Date	Specify a date. The report takes into account only the items in inventory counting documents (or inventory posting documents that are not based on inventory counting documents) with the count date of the one you specify and onwards. By default, this field displays the beginning date of the fiscal year. Note that you cannot enter a future date.
Currency	Displays the local currency in the upper right corner of the dashboard.
Counted Value/Quantity	The total value or quantity of items in the warehouse which were counted since the Relative Count Date .
Uncounted Value/Quantity	The total value or quantity of items in the warehouse that were not counted since the Relative Count Date .
Total Value/Quantity	Total Value/Quantity = Counted Value/Quantity + Uncounted Value/Quantity Value = Quantity × Price (from selected price source)

Note

If an item in a specific warehouse was counted even if only in one bin of the warehouse, SAP Business One considers the item as counted.
SAP Business One considers a negative quantity as zero quantity in this dashboard.

Inventory Counting Risk Assessment

This report appears in the lower right part of the dashboard, and displays the assessment of inventory counting risk by warehouse. It comprises the following three parts:

- **Pie Chart**

It shows the proportions of warehouses with high risk, medium risk, and low risk, respectively.

- **Warehouse Risk Rank**

When you click different risks in the pie chart, you see the top 6 warehouses at the corresponding risk level. By default, warehouses with high risk are displayed.

- **Detailed Risk Assessment Report**

When you click the **Details** link in the **Reference** field under the pie chart, a detailed report appears to show you the risk assessment per item per warehouse. This detailed report presents all warehouses at the corresponding risk level and all items in these warehouses, except the items that are linked to these warehouses but have never been used in any transactions involving these warehouses.

In this report, you can select item rows and press the **Inventory Counting** button to initiate an inventory counting process for them.

The following chart illustrates how the report calculates the risk level of a certain warehouse based on the risk levels of the items in it. The KPIs and related values given in the following chart are only default ones. You can change them to suit your own situation.

Each KPI has two values, value 1 and value 2 (value1 < value 2), and the system calculates the risk level of an item based on rules involving these values.

Risk Level	KPI	Rule
Item Risk Level	<p>Days Since Last Inventory Count: The more time that passes since last inventory counting, the higher the risk is. If the item is new and has never been counted before, the creation date of the item is used as the last count date.</p> <p>Transaction Volume: The larger the transaction volume (since last inventory count), the higher is the priority for inventory counting, and therefore, the higher the risk. The transaction volume is calculated according to the inventory turnover. One transaction with a large quantity is also considered as a high-risk case.</p> <p>Item Value: The higher the cost of the item, the higher is the priority for inventory counting, and therefore, the higher the risk.</p>	<p>Low Risk Item: The values of all KPIs are below value 1.</p> <p>Medium Risk Item: The value of the first KPI (Days Since Last Inventory Count) is between value 1 and value 2, or the value of the first KPI is above value 2, but the values of the other two KPIs are below value 2.</p> <p>High Risk Item: The value of the first KPI (Days Since Last Inventory Count) is above value 2, and the value of at least 1 more KPI (second or third) is above value 2.</p>
Warehouse Risk Level	<p>Percentage of Items at High Risk: The percentage of items that belong to the "High Risk Item" category according to the KPIs and values that you define at the item level.</p>	<p>Low Risk Warehouse: The percentage of items at high risk in this warehouse is below 25% (value1).</p> <p>Medium Risk Warehouse: Includes all the cases which do not fit the low risk warehouse and the high risk warehouse categories.</p> <p>High Risk Warehouse: The percentage of items at high risk in this warehouse is above 75% (value2).</p>

