

Dashboard Spec

Sales_Force_SSD_Daily_Dashboard

Log in details for new server

REMOTE DESKTOP LOGIN

IP: 41.76.209.124

Username: OWLAFRICA2\Administrator

Password: nBvU392@

MSSQL SERVER LOGIN + JASPER DATASET CONNECTION

Username: sa

Password: nBvU392@

How to validate users that this report is emailed to on daily schedule

1. [Dim_Aspen Employee List Sales] is the table that is used to loop through and mailed to users the Dashboard where [Designation Name] = 'Rep'. Field [Email] is the user's email. Before report is emailed the first check must be to look at [Status] field. If "Active" then can proceed to next check ELSE exit
 - [Employee Name] and [Manager Name] fields is used to populate boxes 1 and 2 in report – rep and the regional sales manager
 - IF [Designation Name] = 'Rep' THEN (To get subset of data for rep – his product basket(team) and his territory)
 - Dataset 1: this is filtered on rep team and territory
 - PARAM1 = [Team] AND PARAM2 = [Territory]
 - 1. PARAM1(first filter) is used to filter reps products that he sell
 1. SELECT [Aspen_Product_Code] FROM [AspenHQ].[dbo].[Dim_Aspen_Teams_Louwrie] WHERE Team = PARAM1
 - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Manufacturer_Product_Code] in ([Aspen_Product_Code])
 - 2. PARAM2(second filter) is used to filter reps customers that he calls on - customers in his territory
 1. SELECT [orgcode] FROM [AspenHQ].[dbo].[Rep_Dim_Terr_Orgnames] where [Territory Description] = PARAM2
 - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Medpages_OrgCode] in ([orgcode])
 - Dataset 2: this is filtered on rep's team(products) and the territory is this time all territories for this team that is selected – this will be used as national coverage to compare to rep's territory coverage
 - PARAM1(first filter) is used to filter reps products that he sell
 - ❖ SELECT [Aspen_Product_Code] FROM [AspenHQ].[dbo].[Dim_Aspen_Teams_Louwrie] WHERE Team = PARAM1
 - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Manufacturer_Product_Code] in ([Aspen_Product_Code])
 - Territories - SELECT [orgcode] FROM [AspenHQ].[dbo].[Rep_Dim_Terr_Orgnames] where [Territory Description] in (SELECT distinct([Territory]) FROM [AspenHQ].[dbo].[Dim_Aspen Employee List Sales] where team = 'PARAM1 ')
 - ❖ SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Medpages_OrgCode] in ([orgcode])

Date: 14 Oct 2016

1

Sales Force Sales In Dashboard

Rep: Jonny Depp

Indep - East Rand : Basket 1 dependent 1

Current Month Sales Trend Indep - East Rand : Basket : Independent 1

CUSTOMER GROUP
SALES CURRENT
MONTH OCT 2016

PHCY - CLICKS

Sales R 2 653

5 out of 7

PHCY - Dis chem

Sales R 2 653

5 out of 7

Ind Pharm

Sales R 2 653

4 out of 7

Pharmacy Medirite

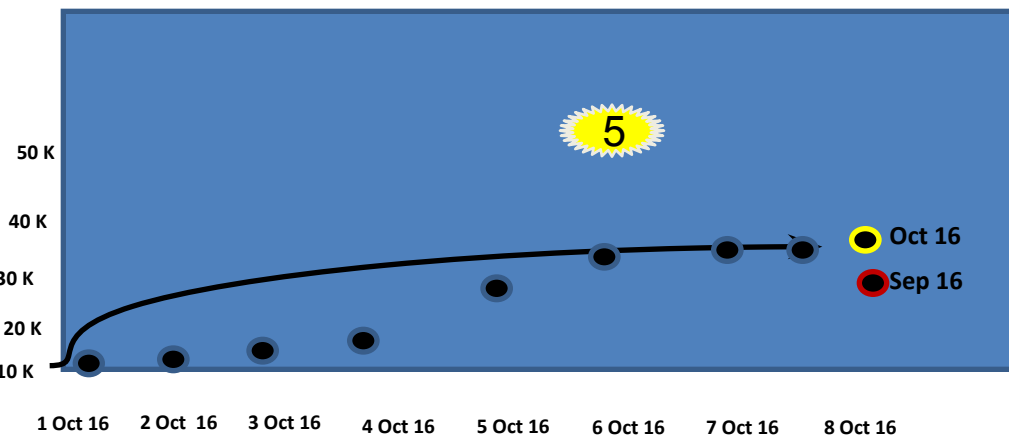
Sales R 2 653

5 out of 7

Hosp Netcare

Sales R 2 653

5 out of 8



GROWTH TOTAL SALES
MAY 2016 Vs. PREVIOUS
MONTH



10 %

GROWTH # Customers
MAY 2016 Vs. PREVIOUS
MONTH



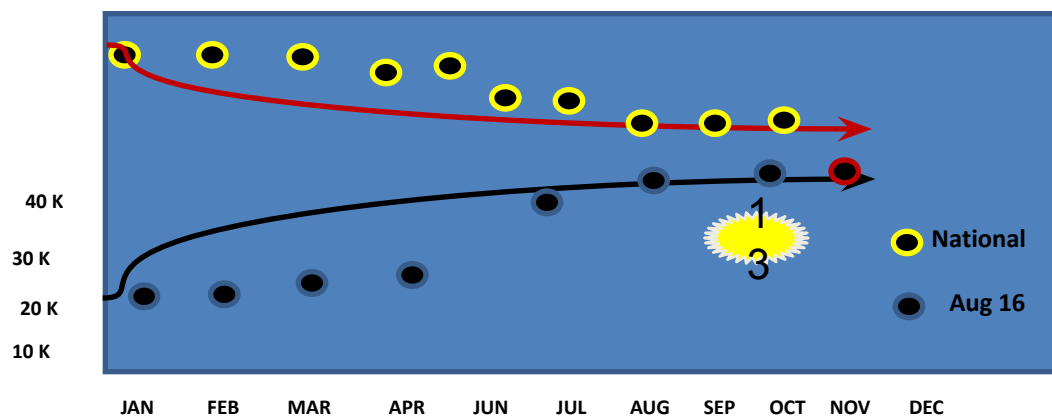
-10 %

GROWTH # SKU's
MAY 2016 Vs. PREVIOUS
MONTH



10 %

National Sales Trend Vs Indep - East Rand : Basket : Independent 1



SALES CURRENT
MONTH OCT 2016

9

SALES TOTAL

CURRENT MONTH MAY 2016

R 22 653 0

NUM SKU

MAY 2016

120 out of 130

NUM CUSTOMERS
MAY 2016 in territory

115 Out of 120

1077
MIL

107
MIL

10
MIL

Dashboard page one data information

1. Display the date that the report is generated
2. Dataset 1 - SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) and Group By [ASPEN CLASSIFICATION] – display underneath each other
3. Dataset 2 - SELECT count(distinct Medpages_OrgCode) FROM [Rep_SSD_Daily_Sales_Monthly_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) and Group By [ASPEN CLASSIFICATION] – The total amount of pharmacies : SELECT count(distinct Medpages_OrgCode) FROM [Rep_SSD_Daily_Sales_Monthly_Sum] – is to get the total amount of pharmacies in this group – this selection is on whole year – dataset 2
- 4.
5. Dataset 1 – Line Chart - SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to display latest months sales totals per day. X axis is the days of latest or current month
6. Dataset 1 – % Sales growth- SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to get latest months sales totals then compare to total sales from previous month with same amount of days. For instance today is the 14 th – I can only compare up to 14 th of previous month to get accurate growth %
7. Dataset 1 – % customer growth- SELECT count(distinct [Medpages_OrgCode]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to get latest months customer count then compare to customer count from previous month with same amount of days. For instance today is the 14 th – I can only compare up to 14 th of previous month to get accurate growth %
8. Dataset 1 – % product growth- SELECT count(distinct [Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to get latest months product count then compare to product count from previous month with same amount of days. For instance today is the 14 th – I can only compare up to 14 th of previous month to get accurate growth %
9. Dataset 1 – select max(Tran_YearMonths) to display latest month in header in text box type
10. Dataset 1 - SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) – to display latest months sales total
11. Dataset 1 - SELECT count(distinct([Manufacturer_Product_Code])) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) to get count of customers for the max day. Then SELECT count([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] to get total products

Dashboard page one data information

12. Dataset 1 - SELECT count(distinct([Manufacturer_Product_Code])) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) to get count of customers for the max month. Then SELECT count([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] to get total customers

13. Dataset 1 - SELECT count(distinct(Medpages_OrgCode)) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) to get count of customers for the max Month. Then SELECT count(Medpages_OrgCode) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] to get total customers

14. **Dataset 2** –SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths >= 201601 – to display years data per month sales total – THIS IS ON REPS TEAM AND TERRITORY. The top line is National coverage – show all territories but same team as rep – Filter on team

Indep - East Rand : Basket : Independent 1

Customers group performance last 3 months

[illegible]

Dashboard page one data information

1. **Dataset 2** – Display list of [ASPEN CLASSIFICATION] groups that are in the territory. Sort 4.
2. Dataset 2 – Display month names of last 3 months as headers of columns
3. Dataset 2 - SELECT count distinct ([Medpages_OrgCode]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum
4. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = 'product' and last 3 months total
5. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = 'product' and group by month to display month – last 3
4. Dataset 2 - select sum(line total) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] for latest month per group

Customers who bought products(SKU) last 3 months

PRODUCT	Potential # Customers -2016	Total Sales Value for 3 Months	# Customers Aug 16	# Customers Sept 16	# Customers Oct 16	TOTAL SALES VALUE FOR October 2016
1	3	4	5	2		6
DOLOROL FORTE TABS 50'S	234	R345	67	44	123	R 456
DICLOFENAC 50MG TABS 500'S	232	R34534	88	56	123	R 989
MYBUCOD TABS 30'S	200	R567	55	44	44	R789
LENAPAIN TABS 500'S	180	R78678	34	66	44	R3434
PANAMO R-75 SR TABS 30'S	45	R5464	45	23	23	R2334

Dashboard page one data information

1. **Dataset 2** – Display list of products that the reps team sell. This will be the team parameter. Sort 4.
2. Dataset 2 – Display month names of last 3 months as headers of columns
3. Dataset 2 - SELECT count distinct ([Medpages_OrgCode]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum
4. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = 'product' and last 3 months total
5. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = 'product' and group by month to display month – last 3
4. Dataset 2 - select sum(line total) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] for latest month per group

SKU(product) that was bought last 3 months by customers

PRODUCT	Potential #sku - 2016	Total Sales Value for 3 Months	# SKU bought in Aug 16	# SKU bought in Sept 16	# SKU bought in Oct 16	TOTAL SALES VALUE FOR October 2016
1	3	4	2	5		
Customer 1	154	R323	67	44	123	R 456 6
Customer 2	120	R345 34	88	56	123	R 989
Customer 3	110	R534 5	55	44	44	R789
Customer 4	80	R543 5	34	66	44	R3434
Customer 5	70	R34	45	23	23	R233 4

Dashboard page one data information

1. **Dataset 2** – Display list of customers that is in the reps territory. This will be the territory parameter. Sort 4.
2. Dataset 2 – Display month names of last 3 months as headers of columns
3. Dataset 2 - SELECT count distinct ([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum]
4. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = 'product' and last 3 months total
5. Dataset 2 - SELECT count distinct ([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = 'product' and group by month to display month – last 3
4. Dataset 2 - select sum(line total) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] for latest month per group

Supplier Data Roster Aug 16 - Oct 16

Supplier Field

First Line
Manager name

Rep

shows if on
selected date if
the supplier made
any transactions

4

UPD Bloemfontein

UPD Port Elizabeth

| Ring

Kharwastan

UPD Johannesburg

Enter dates
for latest 3
months

26/9	27/9	28/9	30/9	1/10	2/10	3/10	4/10	5/10	6/10
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5

DateTran Field
(month runs 26 -25)

1. Disabled. Table: [Dim_Aspen Employee List Sales]
Field: [Manager Name]
2. Disabled. Table : [Dim_Aspen Employee List Sales]
Field: [Employee Name]
4. Table: [Rep_SSD_Daily_Sales_Sum]
Field: [Supplier]
5. Table: [Rep_SSD_Daily_Sales_Sum]
Field: [Tran_Date]