

**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] )

Rep: Jonny Depp

Indep - East Rand : Basket 1 dependent 1

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

SALES CURRENT MONTH OCT 2016

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

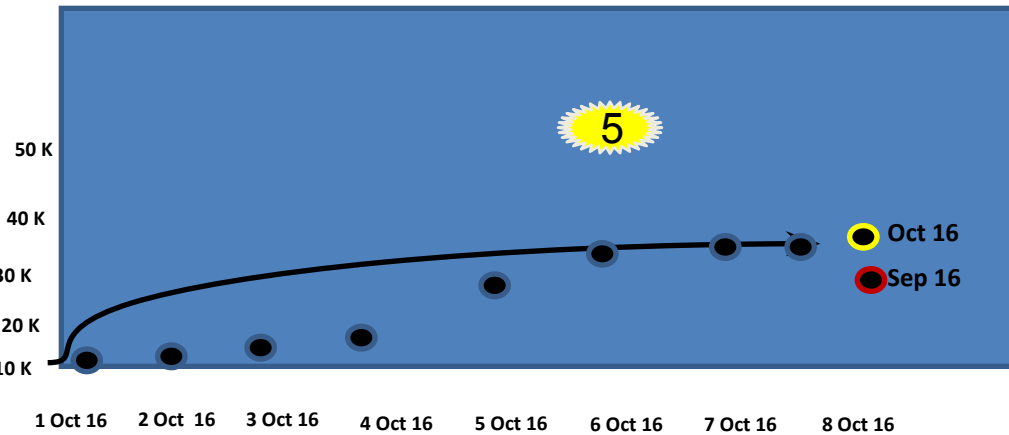
Sales R 2 653  
4 out of 7

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 %

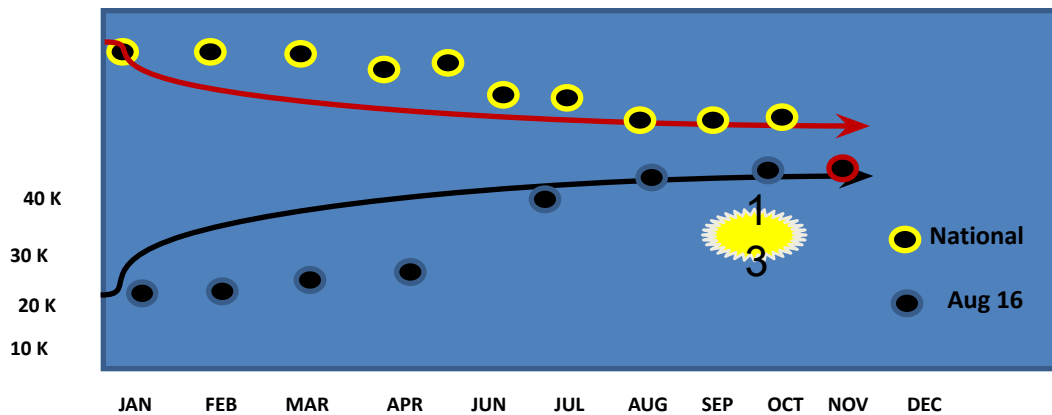
GROWTH # Customers MAY 2016 Vs. PREVIOUS MONTH

▼ -10 %

GROWTH # SKU's MAY 2016 Vs. PREVIOUS MONTH

▲ 10 %

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



SALES 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 320

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









# 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
						
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

1

First Line  
Manager name

2

Rep

Supplier Field

shows if on  
selected date if  
the supplier made  
any transactions

UPD Bloemfontein

UPD Port Elizabeth

Ring

KHARWASTAN

UPD Johannesburg

	26/9	27/9	28/9	30/9	1/10	2/10	3/10	4/10	5/10	6/10
UPD Bloemfontein	●		●	●		●		●		●
UPD Port Elizabeth	●	●		●				●	●	●
Ring	●			●	●		●		●	●
KHARWASTAN	●	●		●			●		●	
UPD Johannesburg	●		●	●			●			●

4

Enter dates  
for latest 3  
months

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]