Performance Manager Overview

Performance Manager is designed to act as a guide and can help you answer two important questions: 'How am I doing?' and 'What Adjustments do I Need to Make?'

At a glance you can see a snapshot of your business and use the information to make purchasing, staffing and merchandise transfer decisions.

In this course, we will take a quick tour of some of the important components of Performance Manager and go over some basic navigation. We will launch the application and have a brief review of the Starting page.

Let's begin.

Topics

- Performance Manager Starting Page
- Transaction Summary
- Store Summary
- Current Accounts Receivable
- Most Recent Inventory Snapshot Values

Performance Manager Starting Page

Performance Manager is a Compass based application that can be accessed by launching the Compass Client from the desktop of your PC [pause] or from the Eagle Application Menu by clicking on the 'Compass' option [pause] and then 'Epicor Compass'.

Once the Compass Client has launched you can access Performance Manager from the 'Launch Pad'.

Open the 'Applications' menu [pause] and then double click on 'Performance Manager'.

Notice the bottom of the screen provides links with quick answers to the question 'How am I doing?'

Here you'll find information about who is buying what and when, [pause] are you stocking enough 'A' ranked items, [pause] who are your most loyal customers [pause] and who are your most profitable suppliers.

Alerts, [pause] Analysis, [pause] Scorecards [pause] and Market Basket also provide access to robust reporting and relevant metrics that help you answer the question, 'What Adjustments do I Need to Make?'

Performance Manager also allows you to see Sales and Inventory information for any previous day, [pause] a specific store, [pause] department [pause] or class.

Simply alter the settings at the top of the screen.

With a few keystrokes you have access to the specific data you need in an easy to read format.

Transaction Summary

The Transaction Summary on the upper left side of the screen gives you a quick glance at a day's activity.

To view a different date, simply select it from the drop down box [pause] and the screen refreshes.

The Transaction Summary offers you a quick glance at important figures such as Invoice Totals, [pause] Customer Count, and Cash Tendered.

Store Summary

For Multi Store users the 'Store Summary' provides you with a visual representation of how each location is doing on the selected date.

Single store users can also quickly evaluate Net Sales, [pause] 'Gross Margin' [pause] and Returns.

Current Accounts Receivable

The pie chart on the bottom left displays your Accounts Receivable ageing.

Based on the ageing buckets set up on your Eagle system, you can see a visual representation of how many dollars are tied up in past due invoices.

Be sure to check the boxes here for 'Current' and 'Future' balances, [pause] open the 'Page' menu, [pause] and select 'Refresh Page'.

This will provide the most accurate Accounts Receivable figures by including those invoices that are Current and not yet due.   It will also add in the 'Future' balance which is total of the amount of transactions due after the next estimated close date.

Most Recent Inventory Snapshot Values

This section of Performance Manager identifies the value of your current inventory by department. At a glance you can determine if any department seems unusually high or low.

This allows you to quickly narrow down any issues of over or understock. Additionally, departments that use multiple units of measure such as Foot and Roll can quickly be skewed if the merchandise in not received properly. With this chart they can be identified quickly and dealt with promptly.

This section also shows you the departmental or store inventory value of this year, compared to the same day of the week last year.

So if today happens to be the first Wednesday in September of this year, the values displayed here are from the first Wednesday in September of last year.

If there are any large discrepancies you are provided with yet another opportunity to make a swift, educated adjustment.

As you can see, Performance Manager does a tremendous job of providing data in an easy to read format to quickly answer the question, 'How am I doing'.

It also provides you with valuable insight to key business activities so that you can determine what adjustments are needed for your particular sales strategy.

By scheduling appropriate staff levels, making informed buying decisions and staying stocked on your best moving items, Performance Manager allows you to run your business proactively.

About Epicor

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