In earlier Performance Manager courses, you learned to use this powerful tool to answer the questions ‘How am I doing?’ and ‘What adjustments should I make?’

Here, we’ll take Performance Manager to the next level by using the options provided and customizing them for your specific business.

We’ll walk through tailoring the individual pages as well as the grid itself and take a look at setting the Alerts to identify potential areas of concern.

Let’s get started.

Performance Manager is divided into ‘Pages’ to display information relevant to a specific area of your business such as Sales, Inventory and Customers.

When you make modifications to these Pages you have the ability to save those settings as either the default when Performance Manager opens or as a file that you can open later.

In this way, you get to determine how your Work Area looks.

You can modify a Page in many different ways.

For example, you can edit the names of the current Work Area titles.

When you right-click on a heading you have the option to ‘Change Title’.

Selecting this allows you to enter any Text that better describes this section of the open Page.

Dependent on your security, you have the option of changing the Border size from the Right Click menu. This determines how large or small the margins are in each section.

‘Work Area Splitters’, the lines separating those same sections, can be hidden or viewed.

You can also use the mouse to drag and alter their size.

To save your modifications simply select ‘Page’ from the upper menu, and then choose ‘Save Current Page’.

Here you are asked to give your file a name.

As with any file, try to be consistent when creating the Name. Perhaps it identifies your store location or role.

Enter a valid, easy to understand Description.

The Scope provides three choices when saving your file.

‘System’ indicates that this page is available to anyone using Performance Manager.

‘Store’ limits access to your location and ‘User’ to your log in.

You can set your Page as the Default by checking this box. When Performance Manager is opened, this Page will then display instead of the Epicor created Starting Point.

You can also Add this Page to the ‘Favorites’ section of the Launch Pad by checking here.

Pages that reflect a Scope of ‘Epicor’ may not be altered or deleted.

Each function has a ‘Starting Point’ identified by the ‘Epicor’ Scope.

Click the ‘Scope’ heading to sort the list.

The Performance Manager Starting Point is located here.

Even though you cannot alter or delete files with a Scope of Epicor, you can save your file with the same name.

If you modify the Performance Manager Start page and want your changes to appear each time it is launched, highlight ‘PM Starting Point’ and choose ‘Save’.

Because the Start Page appears on the Launch Pad you will receive the following message.

Choose ‘Yes’ to have your page open when you initiate Performance Manger from the Launch Bar.

Notice that although your file is saved with the same name, the Scope is not set to Epicor.

If you wish to return to original Epicor default and no longer have your Page display, you can simply delete your file.

Highlight it and use the 'Delete' button below or right click and choose Delete.

Changes to the Grid alter the data that is displayed as well as the presentation of query results.

We will open the 'Analysis' page and take a look at the options available.

Choose a query to review.

Notice there is a Header row, and Detail Area.

The right-click menu has different options available depending on which part of the grid your cursor resides in.

Let's look at some of the choices you have from the Header sub menu.

Filters are also accessible when you right-click the Header row and choose 'Show Filters'.

A box appears under the column heading and when you click here you are able to elect filters such as 'Equals', 'Does not equal' and so on.

Continue your formula creation by entering the value in the open text field.

Press 'Enter' when complete and your data will display only that information that falls within your set parameters.

Selecting Control Panel from the header section of the grid, opens a submenu with many choices.

Here you can export to excel or PDF format, zoom in or out to a larger font, or print your output.

Similar to Eagle functionality, the ‘Column’ option allows you to customize the title of the column you right-clicked.

It also gives you the ability to insert a new column using various formulas and basic arithmetic.

Now let’s look at the right-click menu options that are available in the detail area of the grid. Right click and choose ‘Control Panel’, and then select ‘Show Grid Attributes’.

This list provides great flexibility to decide which features are being displayed or used in your grid.

Let’s select the ‘Show Totals’ option and press ‘Ok’.

Notice the yellow dot that appears in the header row when we return to the grid.

Click this dot on a column that you wish to total or provide some level of summary information.

The resulting pop up menu allows you find the ‘Average’, ‘Count’, ‘Minimum’ or ‘Maximum’ value.

You can even provide multiple lines of summary information. For example, you may want to ‘Count’ rows as well as display the ‘Sum’ of the data.

Simply select both checkboxes and click ‘OK’.

There are 14 powerful grid attributes here. We encourage you to spend some time experimenting with different options to see how they can enhance your interactions with the data presented.

To disable any of the grid attributes, simply de-select that item’s check box.

Right-clicking in the detail area of the grid also allows for Chart, Gauge, or Report view.

You can toggle back and forth between them so explore the look of each.

Compass Analytics users can also select ‘Designer View’, where edits to queries can be performed and saved.

Compass Analytics users can choose ‘Create Drill’ and build row-related detail drill-downs from any grid.

More information on this capability will be covered in the Training on Demand, ‘Compass’ Agenda

Alerts have the flexibility to change cell color, font color, or add graphics such as up arrows and down arrows.

Right click on the specific Header column you wish to track and select ‘Alerts’ and then ‘Set Alerts’.

In our example, we are using the Best Paying Customers query and will ‘Set Alert on Amount Over 90’.

You can use Alert Colors to indicate when a field needs to be brought to your attention, or use Alert Indictors such as arrows, dots or stars.

You can compare your chosen field to a ‘Constant Value or Range of Values’ or a ‘Value in Another Column’.

Click Next and set your alert parameters.

In our example we want to be alerted when the 90 and Over column exceeds $1000.

Press Finish, and your Alert will display in the grid.

To save the Grid with your elected Alerts, right click in the Grid Detail area and select ‘Grid Profiles’ and then ‘Save Grid Profile’.

Enter the information just as you did when saving a Page. Choose ‘Save’.

To reopen your profile, right click in the Grid Detail area and click ‘Load Grid Profile’.

Choose the desired file name. Your saved Alerts appear based on the current data in the grid.

Performance Manager offers many opportunities to customize the Pages of data, making the output more useful to your specific business needs.

The Grid and Alert capabilities allow you to easily identify trends and customize your viewing format.

Use these options to enable your data to better answer those very important questions, 'How is my business doing'   and 'What adjustments do I need to make'.