Performance Manager is designed to help retailers like you answer two questions through-out each busy day: How am I doing? and What Adjustments do I Need to Make?

In this course, you’ll explore more powerful information, this time looking at the Customer, Buying, Scorecards, and Alerts pages.

Let’s go to the Start page and begin.

Click the Customer icon from the Home page to launch the Accounts Receivable data.

Here we see the current Accounts Receivable ageing.

Large Customer ‘Orders Over $500’ are displayed, here.

Double clicking any row launches a pop up window that contains a direct link to the Eagle Order Viewer or the Customer Activity Notes.

Invaluable Customer Metrics include your Best and Worst Paying customers and an overall customer rank based on Net Sales and Gross Margin.

Double-click any of these areas and the Eagle Customer Activity Notes viewer opens.

Now you can enter a note about this customer for future reference or add a reminder for future activity.

For further instruction on using this feature watch the Training on Demand course titled, ‘Customer Activity Notes’.

Notice that the right half of the screen is divided into a top and bottom section.

Relationships between the top and bottom tabs are designated by the number on each.

For example, there’s a ‘Top 100 Customers’ tab with the number 2.

This is related to this tab that also contains the number 2.

When you drilldown within the top section, the corresponding information displays in the bottom portion.

If a tab has no number, it stands on its own and there is no further drilldown available.

For even further detail about a specific transaction, double-click a row in the bottom area.

The Eagle Document Viewer opens to give you sku level detail and the document image.

Other areas of Customer analysis include the ‘Balance Detail’ tab that contains totals by Aging bucket, and a ‘Customer Returns’ viewer.

The ‘Past Due with Orders’ section pinpoints accounts that are not current with their payments and also have open Orders in Point of Sale.

Finally, the ‘Credit Limit Danger’ tab identifies possible credit limit issues or abuse.

Let’s move on and select the Buying icon. This page provides succinct information regarding buyer and vendor activities.

The left side of the page provides insight into inventory dollars that are arriving in the short term or long term.

Inventory Dollars on Order by Buyer appears in the bottom section.

To customize the output here simply enter a Billing Date or a specific Vendor in the lookup area and press Enter.

Double-clicking a row in either the ‘Due Soon’ or ‘Due Later’ grid opens the Eagle for Windows purchasing screen.

Similar to the other pages in Performance Manager, relationships between top and bottom tabs are noted by a number.

For example the ‘Purchasing Forecast’ tab on top corresponds to the ‘Forecast Details’ tab on the bottom because each contains the number 3.

Let’s take a closer look and see if we can answer those two questions: ‘How am I doing?’ and ‘What adjustments should I make?’

Notice that on the top half, we are looking at ‘Target Value’ versus the actual ‘Inventory Value’ by velocity or ‘Popularity Code’.

Target Value is the ‘Order Point times Average Cost’ while ‘Inventory Value’ is ‘Quantity On-Hand times Average Cost’.

A row with few or no red arrows indicates inventory position for that particular vendor is either in line or perhaps over stock.

A row with several red arrows indicates a vendor that is below stock.

This gives you an idea on how you may want to adjust your inventory.

When you double click any line you can see detailed information regarding that vendor’s stock position.

This data will help your buyers determine whether to place an order or to wait.

Further information on this page includes ‘Returns’, ‘Defectives’, ‘Vendor Fill Rate’, ‘Credit Purchase Orders’, and ‘Committed Cash’ associated with your orders.

You can also more easily answer the question ‘How are we doing?’ by opening the Scorecard page.

Scorecards allow you to set goals or ‘Benchmarks’ for four key areas of your business: ‘Net Sales’, ‘Gross Margin’, ‘Average Ticket’, and ‘Customer Count’.

Simply enter the Percent Increase for each area here and select ‘Change’.

Then refresh the actual targets in the upper right area by choosing ‘Page’ and ‘Refresh Page’.

Expand any of the areas below to see your progress ‘Fiscal YTD’, ‘Calendar QTD’, or ‘Calendar MTD’.

Being able to see progress along the way at weekly, monthly, and quarterly levels gives you ample time to make adjustments and keep moving toward your targets.

Finally, let’s take a look at the Alerts page.

To add an alert, expand ‘Alert Configuration’ and select the proper tab.

For example, to set up an alert for ‘Dollars by Popularity’, select the Inventory tab.

Then in the ‘Type’ dropdown, select ‘$ by Velocity’.

Identify a specific ‘Store’, or ‘Category’.

Now choose the Popularity Code you want to follow.

In the ‘Alert Values’ section, drag the slider bars to adjust the ‘Low Value’ and the ‘High Value’ parameters.

Select the Alert Indicator you wish to use for ‘Low’, ‘Mid’, and ‘High’ instances.

There are 4 different symbols for you to generate a key that makes sense for you. If something really needs your attention you could assign the red X to those instances. If you determine an acceptable level you could use the green check mark to represent that.

Once you have set your Alert Indicators, press ‘Save’.

Now expand the ‘Alert Results’ area.

To see the results for the Alert we just configured, you would select the ‘$ by Velocity’ check box on the right, and narrow the results by filling in any other filters.

Refresh the page to view the results.

In this course you learned how Performance Manager can assist you in better managing your Accounts Receivable and purchasing dollars.

Scorecards and Alerts can be configured to assist you with determining how your store is doing and what if any adjustments are needed.

Having one program to monitor the many facets of your business saves you time and keeps you ahead of the game.