



My Dashboard in ESP Orders

Jennifer S - 2018-09-26 - Orders

The My Dashboard section of ESP Orders enables you to view general overview information about your orders. You will be able to view an orders summary, yearly summary, recent activity, and much more!

Dashboard

Dashboard | Quotes | Orders | Invoices | Sample Requests | Purchase Order History

Sales Person: All | Currency: US Dollar (USD) | Filter by Date: Last 30 days

When viewing information, you can use the drop downs at the top to focus the statistics on a particular sales representative (admins only), currency, or time frame.

In the Orders Summary section, sales information for the past month, week, and year will be displayed with statistical analysis. The Yearly Summary will compare the current year with the prior one, so you can see your company's performance at a glance.

Orders Summary		Yearly Summary				
8/4/2024 - 9/3/2024	7/5/2024 - 8/4/2024 Previous 30 days	8/4/2023 - 9/3/2023 Prior Year	Year to Date 1/1/2024 - 9/3/2024	Orders	Total	Avg Margin
 30 Orders \$12.1M Total 5.26% Avg Margin	22 Orders \$68.4k Total 41.14% Avg Margin	36 Orders \$205.8k Total 36.01% Avg Margin	 1,336.82%	316	\$12.4M	6.15%
			Prior Year to Date 1/1/2023 - 9/3/2023	611	\$864.9k	35.96%
			Prior Full Year 2023	739	\$1.0M	37.36%

Last updated on: September 2, 2024

The Recent Activity area provides information on the last five updated orders. The Orders by Status section enables you to sort by the status of an order to view how many current orders are within a specific status, as well as what percentage of all current orders are within that status.

Orders by Status		Filter
Open	99.41% of	Orders
Closed		Orders
Admin Lock	0.15%	Sample Requests
		Quotes
		Invoices
		1

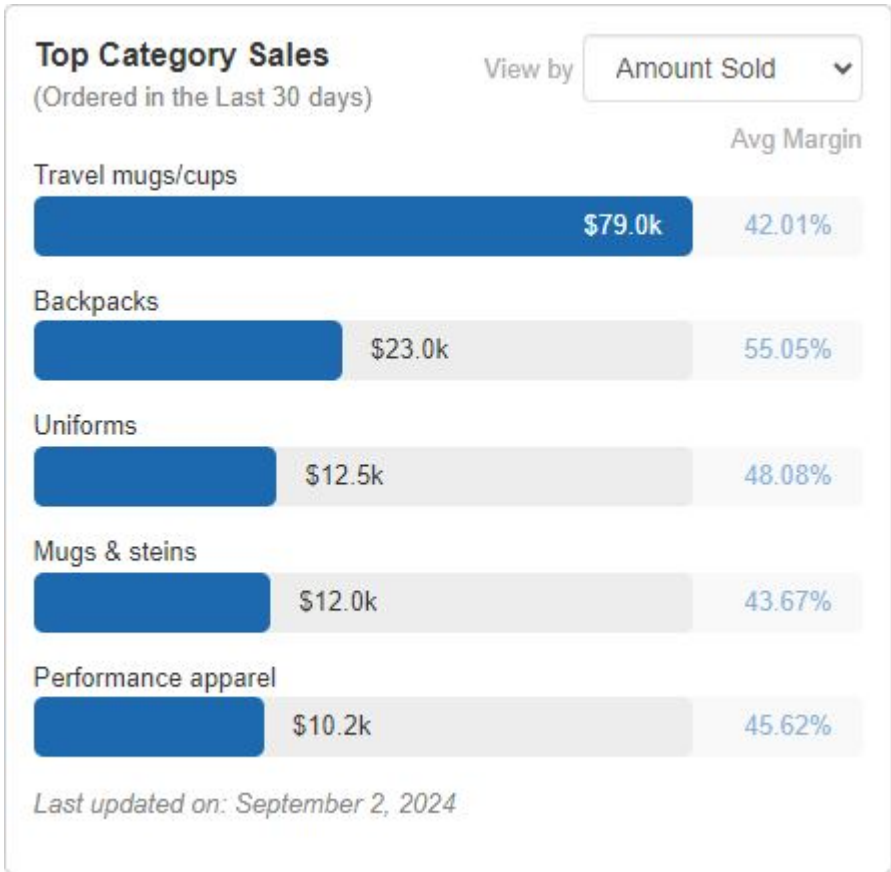
Customer Ordering Activity displays how many active customers from CRM have order information within their records. Use the drop down to sort by the type of order documentation you would like to view.

Open Tasks will list both tasks assigned to you and delegated to others. Use the drop down to sort them by Due Date or In Hands Date. Also, click on the View All button to open the Tasks area of CRM.

The Top Five area enables you to view the customers, suppliers, and sales people with the highest sales within the time frame you selected.

Top Selling Products are the items most frequently sold by your company within the time frame you selected.

Top Category Sales are the type of items which your company has sold the most of within the time frame you selected. Use the View by drop down to sort by Total or Count.



The Websites Performance area enables you to see how many orders have been placed via ESP Websites and Company Stores. You are able to view overall information for all sites, but can also use the drop down to select a specific website.