

DIMENSIONS BI

IN THIS GUIDE

- OVERVIEW OF DIMENSIONS
- BLUE BAR NAVIGATION
- "VIEW" BASED REPORTING

TO GET STARTED

LOGIN TO DIMENSIONS BI

TO SCHEDULE A TRAINING SESSION WITH OUR TRAINING STAFF PLEASE CALL:
1-800-553-2602

MOST MODULE TRAINING SESSIONS TAKE ABOUT AN HOUR



STEP1 Software Solutions • 3547 Old Conejo Rd. #104, Newbury Park, CA. 91320
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Dimensions Overview

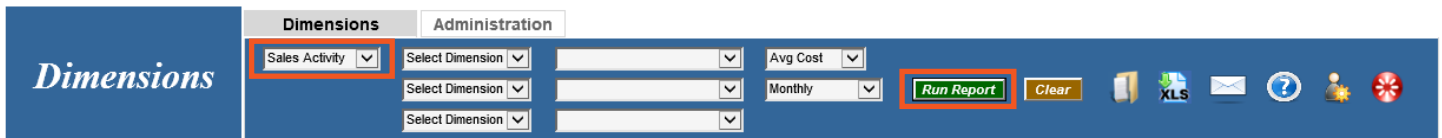
Below you will find the function of the buttons and drop down boxes in Dimensions



1. This drop down box is where the view you would like to look at is selected. ie: Sales Activity, Market Analysis, Order Analysis. (All of these views are pre set and can not be altered by the user)
2. These drop down boxes are for choosing the dimension you would like to reference.
ie: Customer, Sales Class, Market Group. (All of these drop downs are pre set as well and can not be altered by the user)
3. These drop down boxes are for drilling down further according to the previous dimension that was chosen by drop down box #2. ie: Churches, Hospitals, Specific SalesRep, Specific Customer. (All of these drop down boxes are determined by the user in STEP1)
4. This drop down box is where you will determine how to base the view on cost. ie: Avg cost, Comm cost. (All of these are pre set)
5. This drop down box is where you will determine what time frame you want to view. ie: Monthly, Last 3 Months, or by specific month. (All of these are pre set)
6. Run Report: This button is what it says it is, push this button to run the report that you have chosen with all the dimensions that have been chosen.
7. Clear: This button is what it says it is as well, push this button to clear all dimensions in the report and to start new.
8. This icon is where you can save your report and you can also use this to get back to all the reports that have been saved.
9. This icon is where you can export your report in Excel format.
10. This icon is where you can email your report.
11. This icon is where you will find help references and different “views and recipes” and a glossary for terms used in the reports.
12. This icon is for user administration, this is where you would change the password for the user you are logged in under.
13. This icon is for logging out of dimensions.

The best way to get started:

Select View: Sales Activity Click Run Report



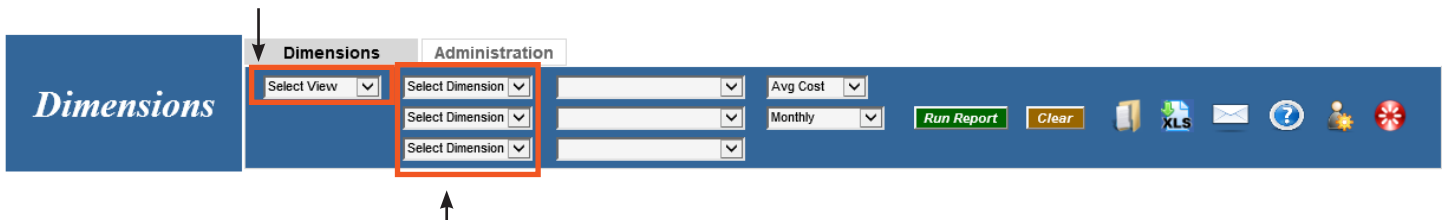
This will show you company totals (or Rep totals from a Rep login) for the previous 12 months. Then you can click on the drill down box, make a selection and then click on an underlined period on the left. You may keep drilling down in this manner. Click 'Clear' when you are done with the view and want to start over with another view. Then Select any view (just like above) and click Run Report to see the data that's contained in each view.

Once you have a feel for navigation, and you know right where you want to get to, you can Select Dimensions in the Blue Bar to get there faster.

BE SURE TO FOLLOW THESE BASIC RULES:

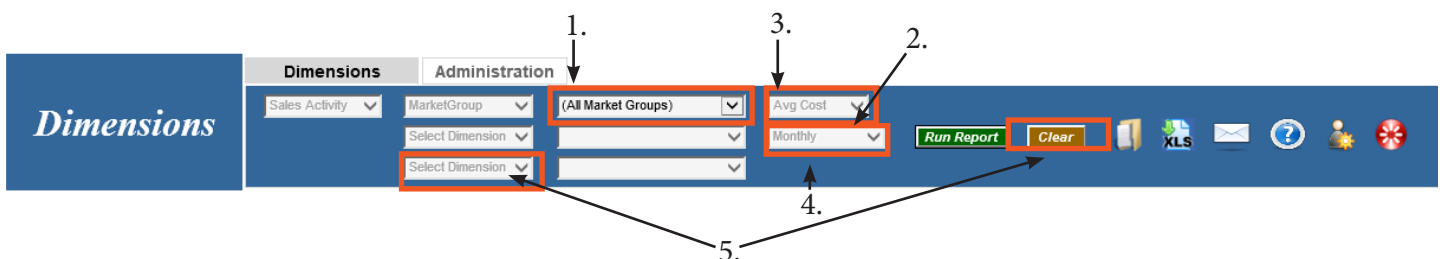
Work left to right on the blue bar

Select a View (different formats)



You may select (or cross) dimensions in up to 3 layers

1. If you select a dimension and want to return "ALL", this dimension needs to be the last in the string
2. If you run a view with "All" as your last dimension selection, data will be presented in Period to Date. If your selection is definitive you will see rolling months, years, etc.)
3. Select the cost basis for profit calculations. Rebate Cost uses Rebate Cost if the Cprod has one, Average Cost if not. (Reps are restricted to Comm Cost.)
4. Select the Period you want reported. If you select Last X Months you must Select a Dimension with an "All" filter.
5. Once you Run a View you will need to Clear it if you want to change it or you can click on a Dimension selection, if it is not grayed out, and change that selection.



Sales Activity—> MarketGroup ((All Market Groups)) Select Drill Down

Description	Sales			Sales % Total		GP			GP % Total		Avg GP per Order			GP%			Act#
	CY	PY	Var	CY	PY	CY	PY	Var	CY	PY	CY	PY	Var	CY	PY	Var	
<u>(Unassigned)</u>	33,156	41,269	-20.0%	4.02	5.92	7,274	10,415	-30.0%	3.25	5.80	32	54	-41.0%	21.9%	25.2%	-13.0%	0
<u>Automotive</u>	9,943	12,464	-20.0%	1.21	1.79	3,196	3,273	-2.0%	1.43	1.82	82	102	-20.0%	32.1%	26.3%	22.0%	0
Churches	50,914	47,303	8.0%	6.17	6.79	18,694	15,767	19.0%	8.35	8.78	108	95	14.0%	36.7%	33.3%	10.0%	0
<u>Contract Cleaners</u>	58,130	55,634	4.0%	7.05	7.98	17,225	13,341	29.0%	7.69	7.43	39	34	17.0%	29.6%	24.0%	24.0%	0

1.

- Once you run a View you may Drill Down to reach more specific levels of data: click on the drop down box first, click on a dimension and then click on any underlined entry in the left column.
- Use the blue back arrow on the right to back up one level at a time.

Sales Activity(7/2009) —> MarketGroup—> ItemCategory Select Drill Down

2.

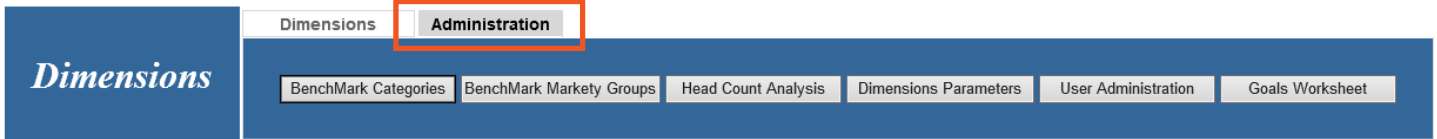
Description	Sales			Sales % Total		GP			GP % Total		Avg GP per Order			GP%			Act#
	CY	PY	Var	CY	PY	CY	PY	Var	CY	PY	CY	PY	Var	CY	PY	Var	
<u>CHEMICALS</u>	13,265	9,603	38.0%	26.05	20.30	5,729	4,462	28.0%	30.64	28.30	73	68	9.0%	43.2%	46.5%	-7.0%	0
<u>Hand Soap</u>	2,644	1,822	45.0%	5.19	3.85	967	790	22.0%	5.17	5.01	42	42	1.0%	36.6%	43.3%	-16.0%	0

Now that you have the view now what to do with it:

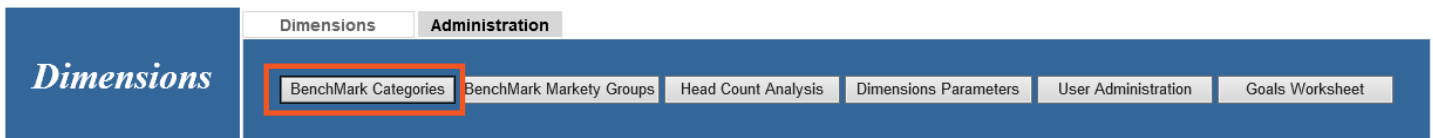
- Save View: Click on folder icon
- Save to Excel: Click on XLS icon
- Email View: Click on envelope icon
- Print: Use your browser print button

DIMENSIONS

Now to map your Market Groups and Item Categories to the Benchmark selections you need to click on the Administration tab above the blue bar. (This is not available from the Rep login)



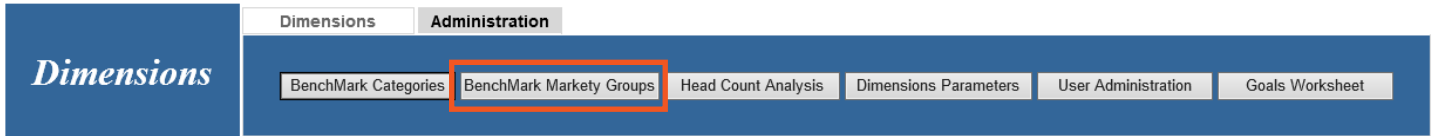
Click on the Benchmark Categories to set up your categories to be relative with your item categories



Category Code	Category Description	Benchmark Category
2	CHEMICALS	Chemicals
4	Hand Soap	Chemicals
6	Odor Control	Chemicals
8	Liners	Liners
10	Paper	Paper
12	Floor & Hand Pads, Sponges	Misc
14	Mops & Acces	Misc
16	Brooms & Brushes	Misc
18	Equipment Sales/Rental/Service	Equipment
19	OBOSOLETE ITEMS SOLD	Misc
20	Plastics	Misc
22	Safety	Misc
23	Gloves	Misc
24	Tools/Misc	Misc
26	Floor Matting	Misc
28	Food Service Items	Misc
30	Packaging	Select Benchmark Category
90	Parts Sales	Misc
95	Lagasse Items	Misc
99	Special Order Items	Misc

Your item/category description is on the left column and the benchmark categories are on the right within the drop down boxes. Once you have all these set to where you would like click save.

Click on the Benchmark Market Group button to set your Market Groups so they are relative with the benchmark market group categories.



Market Group	SalesGroup Description	Benchmark MarketGroup
0	(Unassigned)	Unassigned
101	Automotive	Automotive
102	Churches	Churches
103	Contract Cleaners	Contractors Cleaning
104	Apartment Buildings	Lodging
105	Contractors Other	Contractors Other
106	Entertainment/Recreation	Entertainment/Recreation
107	Government	Govt
108	Health Care	Health Care
109	Lodging	Lodging
111	Industrial	Industrial
112	Office Buildings	Office Buildings
113	Misc	Misc
114	Redistribution	Redistribution
115	Food Service	Food Service
116	Retail	Retail
117	Schools	Schools
118	NA	Unassigned
119	Transportation	Transportation
120	Associations	Unassigned
121	Health Care GPO	Health Care
122	Universities	Schools
123	Non Taxable Industrial	Misc
124	General Motors (EFT)	Automotive
125	Charitable Organizations	Misc
133	(Need SalesGroup Description)	Unassigned

Save Cancel

Your salesgroup/market groups are located on the left column and the Benchmark MarketGroups are on the right within the drop down boxes, once you have all these set to where you would like click save.

Setting up a new salesmen in Dimensions and setting what they can and can not see.

- a. Click on the Administration Tab
- b. Click on User Administration
- c. Click User ID (choose new) Enter User ID to the right
- d. Set User Role - set to Sales, check CRM User if they are a CRM User
- e. Set User Status - set to Active
- f. Set Sales Person to the appropriate Sales Person
- g. Enter State Salesperson Works In
- h. Enter the Salesperson's email
- i. Enter Salesperson Password for logging in
- j. In the SalesRep Grouping move the appropriate Salesperson to the second box (if you want to have a Salesperson see other Salesperson just move that Salesperson to the second box)
- k. In the SalesRep Data Views move the views you would want the Salesperson to have access to
- l. Click Apply to save

The screenshot shows the Dimensions software interface. At the top, there is a navigation bar with the following tabs: Dimensions, Administration, BenchMark Categories, BenchMark Markety Groups, Head Count Analysis, Dimensions Parameters, User Administration, and Goals Worksheet. The 'Administration' and 'User Administration' tabs are highlighted with red boxes and labeled 'a' and 'b' respectively.

The main form is divided into three sections:

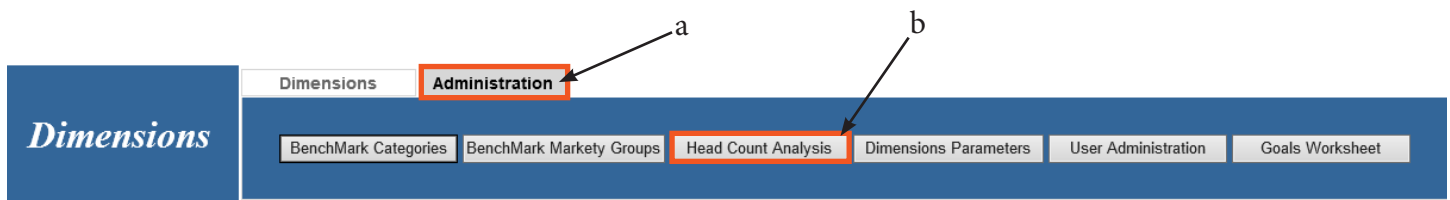
- User Information:** This section contains several fields:
 - User ID: A dropdown menu set to 'New' and an adjacent text input field.
 - User Role: A dropdown menu set to 'Sales' and a checkbox labeled 'CRM User' which is checked.
 - User Status: A dropdown menu set to 'Active'.
 - Sales Person: A dropdown menu set to 'n/a'.
 - Default State: A text input field.
 - User E-Mail: A text input field.
 - Password: A text input field.
- SalesRep Grouping:** This section contains a list of salespersons on the left: (UNASSIGNED), Bob Stanley, Bob Tomlinson, Brad Cowan, Continuing Care PPD, and Gary Stanton. There are right-pointing and left-pointing arrows between the list and an empty box on the right. Below the list are radio buttons for 'Customer Sales Rep' and 'Sales Rep (Invoice)'. The 'Sales Rep (Invoice)' option is selected.
- SalesRep Data Views:** This section contains a list of data views on the left: Sales Activity, Customer Base, Service Levels, Order Analysis, Trend Analysis, Market Analysis, and Head Count Analysis. There are right-pointing and left-pointing arrows between the list and an empty box on the right.

At the bottom of the form, there are two buttons: 'Apply' and 'Cancel'. The 'Apply' button is highlighted with a red box.

Setup for Headcount Analysis View

Before you can use the Headcount Analysis View you must get a count of employees in each department:

- a. Click on the Administration Tab on the Blue Bar
- b. Click on Headcount Analysis
- b. Enter the number of employees in each department for each month. Feel free to use decimals if an employee works in multiple depts.
- e. Click Apply to Save



Year Month

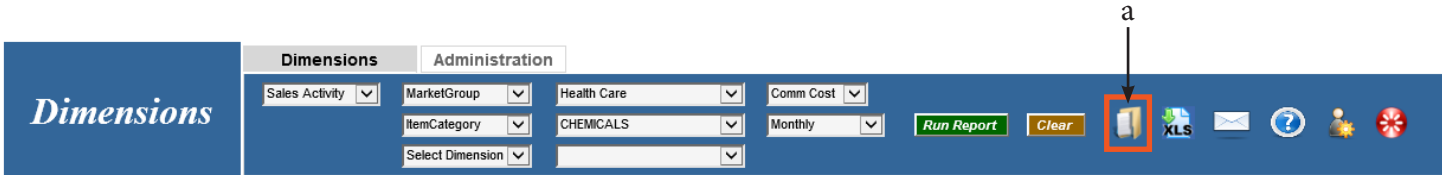
Company Head Count Analysis Administration	
Sales	<input type="text" value="24.25"/>
Management	<input type="text" value="4.00"/>
Warehouse	<input type="text" value="5.00"/>
Delivery	<input type="text" value="6.00"/>
Machine Repair	<input type="text" value="3.00"/>
General & Administrative	<input type="text" value="2.00"/>
Purchasing	<input type="text" value="1.00"/>
Total Head Count:	45.25
Total Operations Head Count:	21

Save a View in Dimensions

You can now save a view for future reference and/or a quick way to pull up a view that you would routinely visit.

Select your View, Dimensions, Costs and Time Period the way you normally would. Once you click Run Report and determine that this is a view you would like to save:

a. Click on the Saved Reports icon (file folder) on the blue bar.



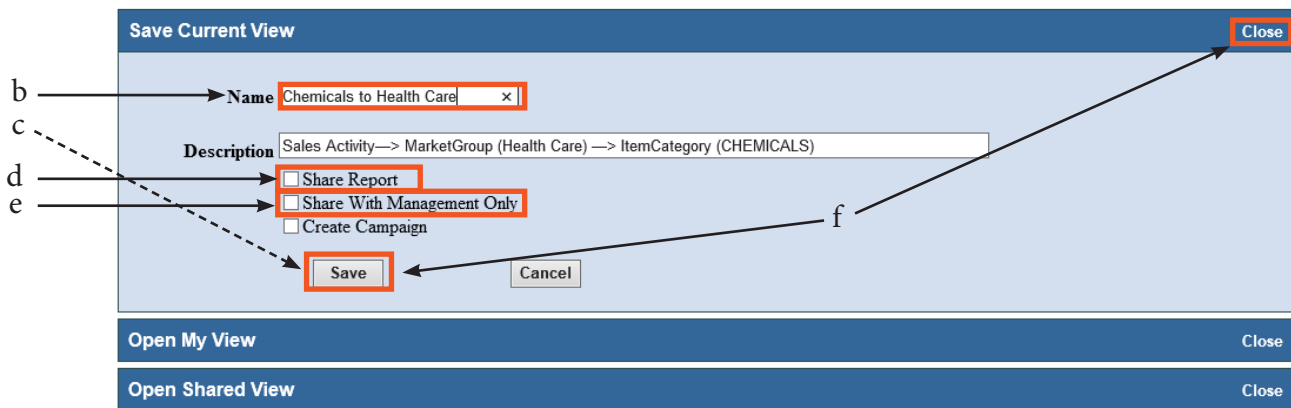
Sales Activity—> MarketGroup (Health Care) —> ItemCategory (CHEMICALS) Select Drill Down

Year	Period	Sales				GP				Avg GP per Order				GP%				Act#
		CY	PY	Var	Bmark	CY	PY	var	Bmark	CY	PY	Var	Bmark	CY	PY	Var	Bmark	
2009	July	35,465	30,930	15.0%	511,537	10,880	10,766	1.0%	158,769	60.11	62.59	-4.0%	119	30.7%	34.8%	-12.0%	31.0	0
2009	June	32,900	32,182	2.0%	488,415	10,575	11,511	-8.0%	151,114	61.12	70.19	-13.0%	111	32.1%	35.8%	-10.0%	30.9	0
2009	May	34,578	26,701	30.0%	447,207	10,971	9,131	20.0%	135,008	59.95	61.28	-2.0%	106	31.7%	34.2%	-7.0%	30.2	0

- b. Give it a name that would be meaningful to you.
- c. If you want to save it to your list only: click the Save button and Close and you are done.
- d. If you want to share the report with others you have a decision to make. If you want it to be available to all users (including reps) check the Share Report box.

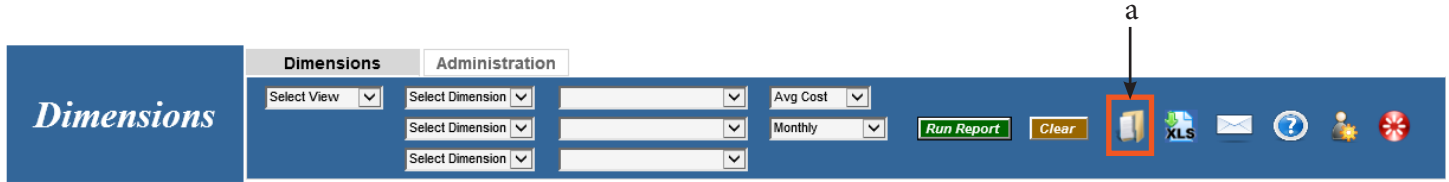
Important: If this is your intent...make sure you have selected Comm Cost for your view. Users will see whatever you have selected for your view.

- e. If you want to share, but not with Sales Reps, check the Management Only box.
- f. Then Click Save and Close.



Retrieve a Saved View/Report in Dimensions

a. Click on the Saved Reports icon (file folder) on the blue bar.



b. Click on Open My View to see a list of reports you have saved for yourself only.

c. Click on Open Shared View to see a list of reports that you have saved for others and/or others have saved for you.



Save Current View
Close

Name

Description

Share Report
 Share With Management Only
 Create Campaign



d. Click on the green arrow on the left to run a report.

e. Click on the Red X to delete a saved view.



Save Current View
Close

Open My View
Close

Report Name	Description	Created	
Chemicals to Health Care	Sales Activity—> MarketGroup (Health Care) —> ItemCategory (CHEMICALS)	4/8/2014	
Hand soap for the hotels	Sales Activity—> MarketGroup (Lodging) —> ItemCategory (Hand Soap)	4/8/2014	
Go Jim to Indust.	Sales Activity—> MarketGroup (Industrial) —> SupplierName (GoJim)	4/9/2014	
Test #2	Sales Activity—> MarketGroup (Industrial) —> SupplierName (GoJim)	4/9/2014	

Open Shared View
Close

Customer Base View

This View gives you a snapshot of the current status of your accounts.

Total Accounts - counts all customers set up in your data base.

New Accounts - counts customers with the first sale date last month.

Active Accounts - counts customers who have bought something in the last 3 months.

Lost Accounts - counts customers who have fallen inactive. By definition: they have not purchased in the last 3 months but they did buy something the month before that.

Regained Accounts - counts customers that were inactive but then bought something in the last month.

Customer Base Select Drill Down

Year	Month	Total Accounts		New Accounts		Active Accounts		Lost Accounts		Regained Accounts	
		# Accts	% All	# Accts	% All	# Accts	% All	# Accts	% All	# Accts	% All
2009	July	3,586	100.0%	26	100.0%	1,378	100.0%	63	100.0%	40	100.0%

Drill Down Options:

Sales Class - displays accounts according to sales class rank (i.e. A, B, C etc.)

Corp Account - displays your Corporate accounts and total accounts

Market Group - displays accounts according to market group (i.e. Cleaners, Churches, Hospitals, etc.)

Sales Office - displays accounts according to sales office

Sales Rep - displays accounts according to sales rep

Total Accounts - displays list of total accounts by customer acct. and customer name

New Accounts - displays list of new accounts by customer acct. and customer name

Active Accounts - displays list of active accounts by customer acct. and customer name

Lost Accounts - displays list of lost accounts by customer acct. and customer name

Regained Accounts - displays list of regained accounts by customer acct. and customer name

Scenario: Discover Lost Accounts by Sales Rep:

- a. Select View: Customer Base
- b. Select Dimension: Sales Rep - Choose (All Sales Reps)
- c. Run Report

The screenshot shows the Dimensions software interface. The 'Dimensions' tab is active, and the 'Administration' sub-tab is selected. The 'Customer Base' dropdown is highlighted with a red box and labeled 'a'. The 'SalesRep' dropdown is set to '(All Sales Reps)' and is highlighted with a red box and labeled 'b'. The 'Run Report' button is highlighted with a red box and labeled 'c'. Below the main interface, the breadcrumb path 'Customer Base -> SalesRep ((All Sales Reps))' is shown, with the 'LostAccounts' dropdown highlighted with a red box and labeled 'd'. An envelope icon in the top right toolbar is highlighted with a red box and labeled 'f'. Below the interface is a table with account data.

Description	Total Accounts		New Accounts		Active Accounts		Lost Accounts		Regained Accounts	
	# Accts	% All	# Accts	% All	# Accts	% All	# Accts	% All	# Accts	% All
Pete	399	11.1%	5	19.2%	129	9.4%	4	6.4%	6	15.0%
Jim	262	7.3%	3	11.5%	101	7.3%	8	12.7%	3	7.5%

- d. Click on the drill down box, select Lost Accounts
- e. Then click on one of the Sales Reps on the far left.
- f. Click on the Envelope button on the blue bar.

Your email dialog box will come up so you can send your rep an email of his/her lost accounts. You should do this the 1st week of each month while the alert is fresh.

Sales Activity View

This view gives you Sales, Gross Profit, Average Gross Profit per Order, and Margin %.

Within each metric you get:

CY - Current Year

PY - Prior Year

Var: % - change from Prior Year to Current Year

Bmark - The average of all distributors in the Benchmarks group

Sales Activity Select Drill Down ▼

Year	Period	Sales				GP				Avg GP per Order				GP%				Act#
		CY	PY	Var	Bmark	CY	PY	var	Bmark	CY	PY	Var	Bmark	CY	PY	Var	Bmark	
2009	July	825,099	696,780	18.0%	511,537	223,999	179,673	25.0%	158,769	80.55	84.75	-5.0%	119	27.1%	25.8%	5.0%	31.0	0

Drill down options:

Customer - displays your sales by Customer accounts

Sales Class - displays your sales by Sales Class Rank (i.e. A, B, C etc.)

Corp Account - displays your sales to your Corporate Accounts

Market Group - displays your sales by Market Groups (i.e. Cleaners, Churches, Hospitals, etc.)

Sales Office - displays your sales by Sales Office

Sales Rep - displays sales for the Sales Rep that is on the Invoice only

Cust Sales Rep - displays sales for the Sales Rep that are assigned to the customer (i.e. a salesmen quits and the accounts are then added to another rep, or house sales are added to a certain rep)

Item Category - displays your sales by the Item Category (i.e. Chemicals, Paper, Liners, etc.)

Item Sub.Cat. - displays your sales by the Item Sub Category (i.e. Chemicals: Disinfectants, Paper: Hand Towels, Liners: High Density, etc.)

Supplier Name - displays your sales by Supplier

Disp/Refill - displays your Dispenser Sales and Refill sales

Order Type - displays your sales by Order Type (i.e. Drop Ship, Cash, Service, etc.)

Items - displays sales by the Item (i.e. ABC Bowl Cleaner, Citrus Degreaser, Scented Aerosol, etc.)

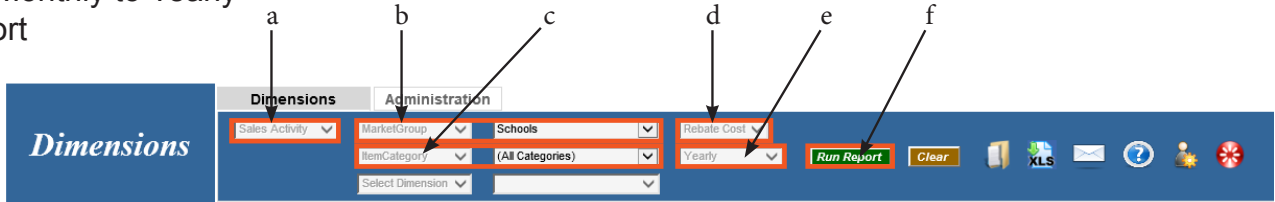
Invoices - displays all invoices for the month that are clicked on or by the previous drill down

BM Categories - displays your ItemCategory Sales and Margin compared to the Benchmark Group

BM Sales Groups (MarketGroups) - displays your SalesGroups Sales, Margin, and GP per order compared to the Benchmark Group

Scenario: To see a breakdown of Item Category Sales for a given Sales/Market Group:

- a. Select View: Sales Activity
- b. Select Dimension: Sales Group and choose "Schools"
- c. Select Dimension: Item Category (leave as All Categories)
- d. Change Avg Cost to Rebate Cost. (Reps are restricted to Comm Cost)
- e. Change Monthly to Yearly
- f. Run Report



Sales Activity → MarketGroup (Schools) → ItemCategory ((All Categories)) → SalesRep

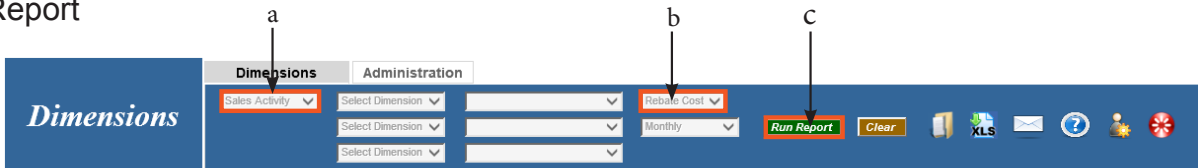
Description	Sales			Sales % Total		GP			GP % Total		Avg GP per Order			GP%			Act#
	CY	PY	Var	CY	PY	CY	PY	Var	CY	PY	CY	PY	Var	CY	PY	Var	
CHEMICALS	282,731	122,369	131.0%	27.17	18.50	87,048	40,725	114.0%	30.39	22.96	109	103	6.0%	30.8%	33.3%	-7.0%	0
Hand Soap	71,863	22,696	217.0%	6.91	3.43	15,392	7,316	110.0%	5.37	4.13	36	44	-19.0%	21.4%	32.2%	-34.0%	0
Odor Control	7,095	5,631	26.0%	0.68	0.85	3,120	2,772	13.0%	1.09	1.56	29	40	-27.0%	44.0%	49.2%	-11.0%	0
Linens	85,959	63,657	35.0%	8.26	9.62	30,212	22,789	33.0%	10.55	12.85	67	85	-22.0%	35.1%	35.8%	-2.0%	0
Paper	216,743	129,766	67.0%	20.83	19.62	43,158	25,984	66.0%	15.07	14.65	55	68	-19.0%	19.9%	20.0%	-1.0%	0
Floor & Hand Pads, Sponges	18,891	7,756	144.0%	1.82	1.17	8,446	3,807	122.0%	2.95	2.15	24	33	-26.0%	44.7%	49.1%	-9.0%	0
Mops & Acces	17,748	5,352	232.0%	1.71	0.81	6,442	1,813	255.0%	2.25	1.02	19	18	6.0%	36.3%	33.9%	7.0%	0
Brooms & Brushes	4,759	3,097	54.0%	0.46	0.47	1,927	1,042	85.0%	0.67	0.59	10	21	-54.0%	40.5%	33.6%	20.0%	0

This displays data for all months this calendar year. If you would then like to see how each rep is doing with Chemicals to Schools:

- g. Click the Drill Down Box and select SalesReps and then click on "Chemicals" at the far left.

Scenario: To see company totals trended monthly:

- a. Select View: Sales Activity
- b. Change Avg Cost to Rebate Cost (this displays all profit metrics using Rebate Cost if there is one, Average Cost if not). (Reps are restricted to Comm Cost)
- c. Run Report



Sales Activity → SalesRep

Year	Period	Sales				GP				Avg GP per Order				GP%				Act#
		CY	PY	Var	Bmark	CY	PY	var	Bmark	CY	PY	Var	Bmark	CY	PY	Var	Bmark	
2009	July	825,099	696,780	18.0%	512,724	249,932	199,815	25.0%	0	89.87	94.25	-5.0%	0	30.3%	28.7%	6.0%	0.0	0
2009	June	801,633	661,645	21.0%	488,415	226,011	194,438	16.0%	0	86.76	96.88	-10.0%	0	28.2%	29.4%	-4.0%	0.0	0

If you want to see a break down by rep for a given month:

- d. Click the Drill Down Box and select SalesReps and then Click on a month on the far left. This will also display each rep as a percentage of total company Sales or GP.

Service Levels View

This view gives you service levels and compares your levels to the average of the Benchmarks group.

Fill Rate by Line (lines filled complete as a % of total lines). This metric uses stock items only.

Fill Rate by Order (orders filled complete as % of total orders).

Avg Days to Ship: not including weekends.

Avg Days to Bill: not including weekends.

CY: Current Year

PY: Prior Year

Bmark: The average of all distributors in the Benchmarks group

Service Levels Select Drill Down

Year	Period	Fill Rate By Line			Fill Rate by Order			Avg Days to Ship			Avg Days to Bill		
		CY	PY	Bmark	CY	PY	Bmark	CY	PY	Bmark	CY	PY	Bmark
2009	July	99.54	99.51	96.13	97.71	97.95	90.92	2.53	2.22	2.30	2.55	2.25	2.42

Drill Down Options:

Customer - displays Service Levels by each customer

Sales Class - displays Service Levels by each Sales Class (i.e. A, B, C , etc.)

Corp Account - displays Service Levels by each Corporate Account

Market Group - displays Service Levels by Market Group (i.e. Cleaners, Churches, Hospitals, etc.)

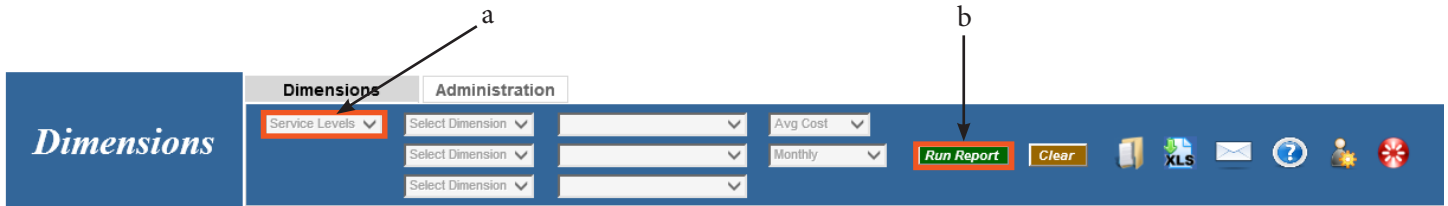
Sales Office - displays Service Levels by each Sales Office

Sales Rep - displays Service Levels by each SalesRep

Order Type - displays Service Levels by Order Type (i.e. Drop Ship, Cash, Service, etc.)

Scenario: Discover how well you are performing amongst each Sales Class to make sure your Class A accounts are getting the best service.

- a. Select View: Service Levels
- b. Run Report



Service Levels | SalesClass | ▼ c

Year	Period	Fill Rate By Line			Fill Rate by Order			Avg Days to Ship			Avg Days to Bill		
		CY	PY	Bmark	CY	PY	Bmark	CY	PY	Bmark	CY	PY	Bmark
2009	July	99.54	99.51	96.13	97.71	97.95	90.92	2.53	2.22	2.30	2.55	2.25	2.42
2008	June	99.56	99.61	96.47	97.69	97.66	91.11	2.29	2.27	2.19	2.28	2.20	2.34

This gives you a rolling twelve months picture of how your company is performing.

- c. Click on the drill down box and choose Sales Class and then click on a given month to the left.

Description	Fill Rate By Line			Fill Rate by Order			Avg Days to Ship			Avg Days to Bill		
	CY	PY	Bmark	CY	PY	Bmark	CY	PY	Bmark	CY	PY	Bmark
	99.71	99.74	0	98.28	98.32	0	2.28	2.21	0	2.25	2.19	0
<u>A</u>	99.53	99.36	0	96.35	97.12	0	3.01	2.58	0	3.00	2.57	0
<u>B</u>	99.74	99.80	0	97.20	97.55	0	2.14	1.79	0	2.12	1.77	0
<u>C</u>	99.54	99.55	0	97.95	98.07	0	2.88	2.64	0	2.83	2.60	0
<u>D</u>	99.12	99.43	0	99.41	99.39	0	2.44	1.92	0	2.63	2.03	0

Note: It is important to pay attention to your fill rates but at the same time don't forget to look at your avg. days to ship so you aren't sacrificing the days it takes to ship to make sure your fill rates are up.

Order Analysis View

This view shows the total number of invoices and the average number of lines per order. It also shows specials as a % of total lines and as a % of total sales.

CY: Current Year

PY: Prior Year

Var: The percentage change from Prior Year to Current Year

Bmark: The average of all distributors in the Benchmarks group

Lines Select Drill Down

Year	Month	Order Count			AVG LINE ITEM/ORDER				SPECIALS AS % LINE ITEMS				SPECIALS AS % SALES			
		CY	PY	Var	CY	PY	Var	Bmark	CY	PY	var	Bmark	CY	PY	var	Bmark
2009	July	2,835	2,155	32%	3.38	3.25	4.0%	2.97	3.82	5.34	-28.0%	5.40	7.99	10.54	-24.0%	6.86

Drill Down Options:

Customer - displays data for each Customer

Sales Class - displays data for each Sales Class (i.e. A, B, C, etc.)

Corp Account - displays data for each Corporate Account

Market Group - displays data for each Market Group (i.e. Cleaners, Churches, Hospitals, etc.)

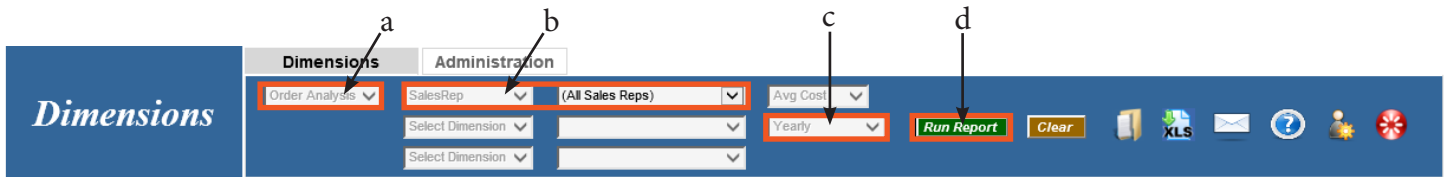
Sales Office - displays data for each Sales Office

Sales Rep - displays data for each Sales Rep

Order Type - displays data for Order Type (i.e. Drop Ship, Cash, Service, etc.)

Scenario: Discover which reps are adding items to each order and which are not:

- a. Select View: Order Anyalysis
- b. Select Dimension: Sales Rep - Choose (All Sales Reps)
- c. Change Monthly to Yearly
- d. Run Report



Lines—> SalesRep ((All Sales Reps)) Customer

← e

f

Description	Order Count			AVG LINE ITEM/ORDER				SPECIALS AS % LINE ITEMS				SPECIALS AS % SALES			
	CY	PY	Var	CY	PY	Var	Bmark	CY	PY	var	Bmark	CY	PY	var	Bmark
Pete	1,288	1,170	10%	3.11	3.10	0.0%	0.00	2.22	4.11	-46.0%	0.00	6.77	4.83	40.0%	0.00
Jim	1,109	1,197	-7%	3.88	3.76	3.0%	0.00	1.09	1.91	-43.0%	0.00	2.41	3.71	-35.0%	0.00

- e. Click the drill down and select Customer
- f. Then click on a Rep at the left to see which customers are contributing to large orders and which are not.

Market Analysis View

This view will show you your top selling Item Categories, SubCats, or Items (either company totals or for a certain Sales/Market Group).

It will also show how each is being priced out, which customers are buying and which are not and who has recently stopped buying.



Market Analysis

Select Top: Categories Sub-Categories Items | 10 |
 Start Date: 1-Aug-2008 | End Date: 31-Jul-2009 | Update

Decription	Amount	Qty	GP	GP%		
Paper	2,320,214.19	89,148	502,759.76	21.67	Sales	No-Sales
CHEMICALS	1,978,099.69	186,862	563,925.16	28.51	Sales	No-Sales

Drill Down Options:

Categories - Displays your top selling Categories

Sub-Categories - Displays your top selling Sub-Categories (you may choose top 10,20,50,100,1000)

Items - Displays your top selling Items (you may choose top 10,20,50,100,1000)

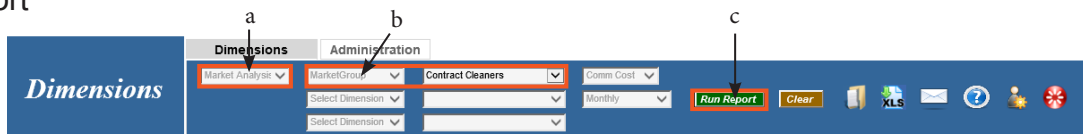
-You may also choose Sales or No-Sales for each Drill Down to see who has bought, hasn't bought and who recently quit buying by choosing a date range in Sales and the Filter of Have Not Purchased in:

Scenario: Discover your top selling items to a certain Market Group:

a. Select View: Market Analysis

b. Select Dimension: Market Group and choose Contract Cleaners

c. Run Report



Market Analysis -> MarketGroup (Contract Cleaners) | Select Drill Down

Select Top: Items | 20 |
 Start Date: 1-Aug-2008 | End Date: 31-Jul-2009 | Update

Code	Decription	Amount	Qty	GP	GP%	Avg Price	Low Price	High Price		
^SPECIAL	ItemDes11	40,986.90	1,384	16,317.83	39.81	103.94	0.94	5,322.24	Sales	No-Sales
113000	Really Good Floor Finish	22,080.55	296	5,329.87	24.14	77.71	50.55	106.75	Sales	No-Sales
102800	ItemDes100024	21,340.16	478	4,954.45	23.22	45.81	25.00	58.53	Sales	No-Sales

d. Change Categories to Items and you can choose Top 10 -1000 if you like

This shows the most popular Items to all your Contract Cleaners, Avg. Price, Low and High
You may want to use this to make a Market Specific Catalog.

AR Analysis View

This view gives you a rolling twelve months and the total current balance for all of your accounts per month. It also gives you the total balance due for all accounts that are delinquent(over 90 days) and what percent are delinquent compared to the Benchmark Group. It also gives you the average age for all outstanding invoices and compares them to the Benchmark Group.

AR Analysis Select Drill Down

Year	Period	Current Balance	Delinquent (over 90 days)			Average Age (outstanding invoices)	
			Balance	Percent	BMark %	Days	BMark
2009	July	826,592	29,958	3.6	9.0	19	39

Scenario: Alerting your sales reps of their delinquent accounts by Customer Name.

- a. Select View: AR Analysis
- b. Select Dimension: Sales Rep and Choose (All Sales Reps)
- c. Run Report

AR Analysis → SalesRep ((All Sales Reps)) Customer

Decription	Current Balance	Delinquent (over 90 days)			Average Age (outstanding invoices)	
		Balance	Percent	BMark	Days	BMark
Pete	33,282	2,773	8.3	0.0	39	0
Jim	49,963	328	0.7	0.0	10	0
John	52,237	1,110	2.1	0.0	14	0

This will give you your list of Sales Reps and there current balance for all their customers and their total delinquent balance. To see the list of customers:

- d. Click the drill down box and choose Customer and then click on a Sales Rep's name

Strategic Pricing

Note - Strategic Pricing You must Select Dimensions - Market Group and Sales Class (as you will notice they are greyed out which signifies they are required fields)

This View shows Sales, GP and GP% (currently) for the selected Market Group and Sales Class. Then you see how much GP you could add by raising prices for the selected Market Group and Sales Class to Market Value (GP Gain) and how many points you would add (GP% Gain)

The screenshot shows the 'Dimensions' software interface. On the left is a blue sidebar with the 'Dimensions' logo. The main area has two tabs: 'Dimensions' and 'Administration'. Under 'Dimensions', there is a dropdown menu for 'Strategic Pricing' (highlighted with a red box) and a 'Select Dimension' dropdown. Under 'Administration', there are several dropdown menus: 'MarketGroup' (highlighted with a yellow box), 'Contract Cleaners', 'Comm Cost', 'SalesClass' (highlighted with a yellow box), and 'D'. There are also buttons for 'Run Report' (green), 'Clear' (orange), and a toolbar with icons for XLS, email, help, and refresh.

Strategic Pricing → MarketGroup (Contract Cleaners) → SalesClass (D) Select Drill Down ▼

Start Date: End Date: Update

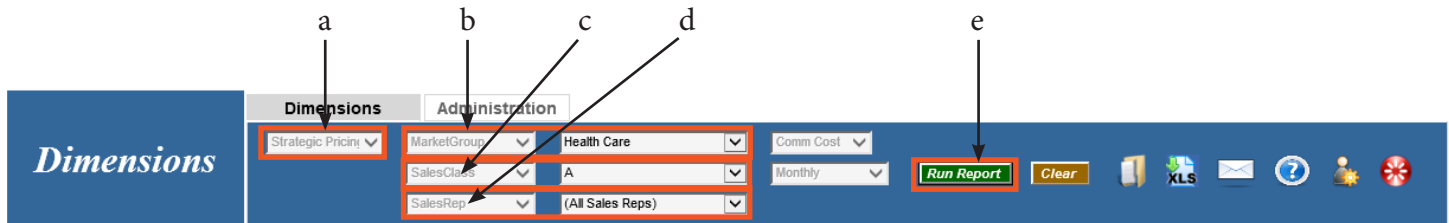
Decription	Amount	GP	GP%	GP Gain	GP % Gain
D	124,189.81	23,979.47	19.31	5,740.12	4.62
	124,190	23,979.5	19.3%	5,740	4.6%

Drill Down Options:

- Supplier Name - will display data by Supplier
- Corp Account - n/a
- Customer - will display data by customer
- Item Category - will display data by Item Category (i.e. Chemicals, Paper, Liner, etc.)
- Sales Office - will display data by Sales Office
- Sales Rep - will display data by Sales Rep
- ItemSubCat. - will display data by ItemSub.Category (i.e. Chemicals: Disinfectants, Paper: Hand Towels, Liners: High Density, etc.)
- Items - will display data by Items (i.e. ABC Bowl Cleaner, Citrus Degreaser, Scented Aerosol, etc.)

Scenario: Discover potential GP Gain by Sales Rep to a certain Market Group and Sales Class

- a. Select view: Strategic Pricing
- b. Select Dimension: Market Group choose "Health Care"
- c. Select Dimension: Sales Class choose "A"
- d. Select Dimension: Sales Rep choose (All Sales Reps)
- e. Run Report



Strategic Pricing → MarketGroup (Health Care) → SalesClass (A) → SalesRep ((All Sales Reps)) → Customer

Start Date: 1-Aug-2008
 End Date: 31-Jul-2009
 Update

Decription	Amount	GP	GP%	GP Gain	GP % Gain
Pete	11,419.92	3,835.12	33.58	628.71	5.51
Jim	73,891.72	22,503.52	30.45	3,926.13	5.32
John	97,909.70	30,550.83	31.20	3,514.48	3.59
Kathryn	178,327.68	57,893.28	32.46	7,893.21	4.43
Kevin	382,913.48	119,645.34	31.25	15,031.24	3.92
Abe	175,870.92	32,700.25	18.59	11,328.35	6.44
Steve	877.76	216.19	24.63	38.19	4.35
	921,211	267,344.5	29.0%	42,360	4.6%

This will display all Sales Reps along with total Sales, total GP, GP%, GP Gain along with GP% Gain. Totals for each metric are listed at the bottom.

If you would like to see each sales reps customers and potential gain by customer:

f. Click on the drill down box and choose Customer and then click on a Sales Rep

Trend Analysis View

This view will show Unit Sales or \$ Sales in Monthly buckets.

Dimensions

Trend Analysis ▼

Select Dimension ▼

Avg Cost ▼

Select Dimension ▼

Yearly ▼

Run Report

Clear

Trend Analysis Select Drill Down ▼

Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nor	Dec	TotYear
2009	765,482	646,751	723,704	642,802	643,746	801,633	825,099	316,905	0	0	0	0	5,366,123
2008	507,544	519,976	528,145	558,524	580,896	661,645	696,780	734,337	693,360	741,066	644,110	682,479	7,548,860
2007	342,954	343,199	397,081	346,721	383,328	372,018	321,379	422,485	414,811	473,356	421,164	426,838	4,665,335

Drill Down Options:

- Customer - displays data at the Customer level
- Sales Class - displays data by Sales Class (i.e. A, B, C, etc.)
- Corp Account - displays data by your Corporate Accounts
- Market Group - displays data by Market Group (i.e. Contract Cleaners, Churches, Hospitals, etc.)
- Sales Office - displays data by the Sales Office
- SalesRep - displays data for the Sales Rep that is on the Invoice only
- CustSalesRep - displays data for the Sales Rep that is assigned to the customer (i.e. a salesmen quits and the accounts are then added to another rep, or house sales are added to a certain rep)
- ItemCategory - displays data at the Item Level (i.e. ABC Bowl Cleaner, Citrus Degreaser, Lemon Scented Aerosol, etc.)
- ItemSub.Cat. - displays data at the ItemSub.Category Level (i.e. Chemicals: Disinfectants, Paper: Hand Towels, Liners: High Density, etc.)
- Supplier Name - displays data by the Supplier
- Disp/Refill - displays data for Dispenser Refills
- Order Type - displays the your Full Orders
- Items - displays data at the Item Level (i.e. Bowl Cleaner, Citrus Degreaser, Scented Aerosol, etc.)
- Invoice - displays data by the Invoice including back order invoices

Scenario: You have a customer that asks you for a report showing purchases by item by month:

- a. Select View: Trend Analysis
- b. Select Dimension: Customer, choose the customer from the drop down box.
- c. Run Report

Trend Analysis → Customer (CustomerName10017) Items

Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TotYear
2009		9	173	24	74	14	78	59	2	0	0	0	433
2008		0	0	0	0	15	0	0	11	25	21	11	107

This shows total unit purchases month by month. You can toggle from unit (Quantity) purchases to \$ (Amount) if you would like.

- d. Click the drill down box, select Items and then Click on a year at the far left. Now you have Item purchase month by month.

Trend Analysis → Customer (CustomerName10017) → Items

Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TotYear
^SPECIAL - ItemDes11	0	6	0	-1	0	0	0	0	0	0	0	1	6
102050 - ItemDes100008	3	3	0	3	1	0	0	0	1	2	0	1	14
102300 - ItemDes100012	0	0	0	0	0	0	0	3	0	3	0	0	6
102700 - ItemDes100020	0	0	0	0	0	0	0	0	0	0	0	0	0

- e. Click on the Envelope Icon on the blue bar to email the list to your customer by entering the customer's email address. If you have another customer request, simply click on the customer drop down box on the Blue Bar and choose another customer.

Headcount Analysis View

You will see 2 measures:

- a. Gross Profit generated for the month per person per department
- b. Number of Orders processed during the month per person per month
- c. Both are compared to the average of the Benchmarks group

You will see that Sales is separated from Operations and Machine Repair is viewed factoring Service Dept. orders only.

Dimensions

Dimensions

Administration

Head Count An

Select Dimension

Select Dimension

Select Dimension

Avg Cost

Monthly

Run Report

Clear

Head Count Analysis

Year 2009
Month July

Headcount Analysis	Company Count	Gross Profit \$ / Count		#Orders / Count	
		Company	Group	Company	Group
Sales					
Sales	24.25	9,246.48	20,355.55	115.01	188.38
Operations					
Management	4.00	56,056.79	66,891.31	697.25	619.03
Warehouse	5.00	44,845.43	63,561.16	557.80	588.21
Delivery	6.00	37,371.19	58,648.08	464.83	542.74
Machine Repair	3.00	74,742.38	75,609.34	929.67	699.71
General & Administrative	2.00	112,113.57	38,379.94	1,394.50	355.18
Purchasing	1.00	224,227.14	142,009.90	2,789.00	1,314.19
Total Operations	21.00	10,677.48	11,082.00	132.81	102.00
Service Department					
Mch Rpr Vs. Service Dept GP only	3.00	4,105.47	4,319.00	51.33	34.00
Total All Departments	45.25	4,955.30	7,064.00	61.64	65.00