Dashboard Spec
Sales_Force_SSD_Daily_Dashboard

Log in details for new server

REMOTE DESKTOP LOGIN
IP: 41.76.209.124
Username: OWLAFRICA2\Administrator
Password: nBvU392@

MSSQL SERVER LOGIN + JASPER DATASET CONNECTION
Username: sa
Password: nBvU392@

How to validate users that this report is emailed to on daily schedule

1. [Dim_Aspen Employee List Sales] is the table that is used to loop through and mailed to users the Dashboard where [Designation Name] = 'Rep' . Field [Email] is the user's email. Before report is emailed the first check must be to look at [Status] field. If "Active" then can proceed to next check ELSE exit
   - [Employee Name] and [Manager Name] fields is used to populate boxes 1 and 2 in report – rep and the regional sales manager
   - IF [Designation Name] = 'Rep' THEN (To get subset of data for rep – his product basket(team) and his territory)
   - *Dataset 1:* this is filtered on rep team and territory
     - PARAM1 = [Team] AND PARAM2 = [Territory]

     1. PARAM1(first filter) is used to filter reps products that he sell
        1. SELECT [Aspen_Product_Code] FROM [AspenHQ].[dbo].[Dim_Aspen_Teams_Louwrie] WHERE Team = PARAM1
           - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Manufacturer_Product_Code] in ([Aspen_Product_Code])

     2. PARAM2(second filter) is used to filter reps customers that he calls on - customers in his territory
        1. SELECT [orgcode] FROM [AspenHQ].[dbo].[Rep_Dim_Terr_Orgnames] where [Territory Description] = PARAM2
           - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Medpages_OrgCode] in ([orgcode])

   - *Dataset 2:* this is filtered on rep's team(products) and the territory is this time all territories for this team that is selected – this will be used as national coverage to compare to rep's territory coverage
     - PARAM1(first filter) is used to filter reps products that he sell
       - SELECT [Aspen_Product_Code] FROM [AspenHQ].[dbo].[Dim_Aspen_Teams_Louwrie] WHERE Team = PARAM1
         - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Manufacturer_Product_Code] in ([Aspen_Product_Code])

     - Territories - SELECT [orgcode] FROM [AspenHQ].[dbo].[Rep_Dim_Terr_Orgnames] where [Territory Description] in (SELECT distinct([Territory]) FROM [AspenHQ].[dbo].[Dim_Aspen Employee List Sales] where team = ' PARAM1 ')
       - SELECT FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Medpages_OrgCode] in ([orgcode])

Date: 14 Oct 2016 1

Sales Force Sales In Dashboard

Rep: Jonny Depp

Indep - East Rand : Basket 14 pendent 1

CUSTOMER GROUP
SALES CURRENT
MONTH OCT 2016

PHCY - CLICKS 2
Sales R 2 653
5 out of 7 3

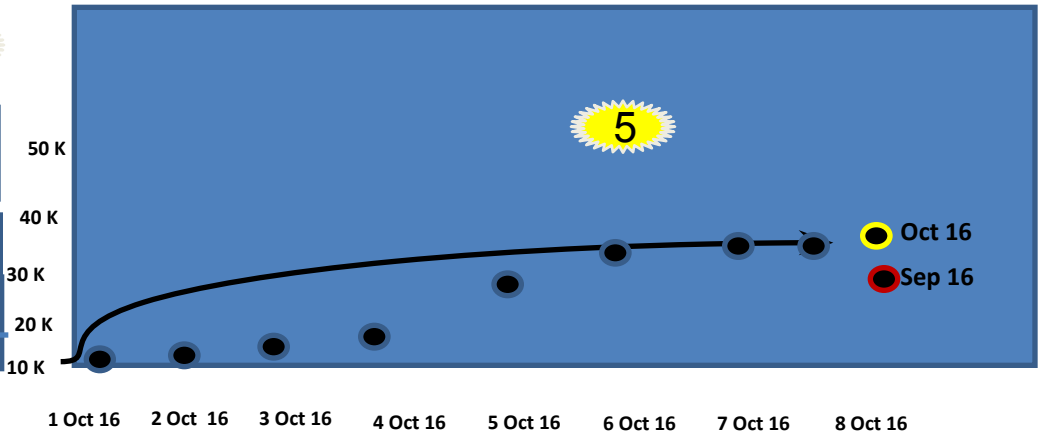
PHCY – Dis chem
Sales R 2 653
5 out of 7

Ind Pharm
Sales R 2 653
4 out of 7

Pharmacy Medirite
Sales R 2 653
5 out of 7

Hosp Netcare
Sales R 2 653
5 out of 8

Current Month Sales Trend Indep - East Rand : Basket : Independent 1

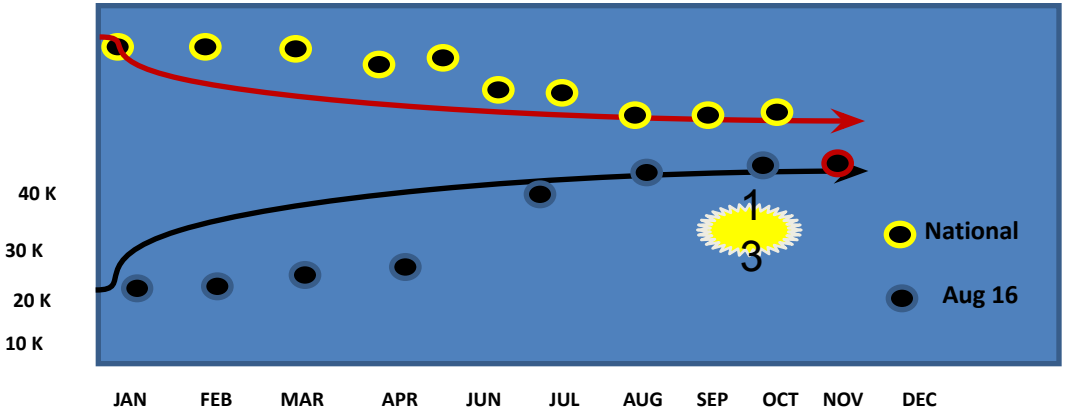


GROWTH TOTAL SALES MAY 2016 Vs. PREVIOUS MONTH 6
10 %

GROWTH # Customers MAY 2016 Vs. PREVIOUS MONTH 7
-10 %

GROWTH # SKU's MAY 2016 Vs. PREVIOUS MONTH 8
10 %

National Sales Trend Vs Indep - East Rand Basket :Independent 1



1077 MIL
107 MIL
10 MIL

9
SALES CURRENT
MONTH OCT 2016

SALES TOTAL
CURRENT MONTH MAY 2016
R 22 653 10

 # NUM SKU
MAY 2016 11
120 out of 130

 # NUM CUSTOMERS
MAY 2016 in territory 12
115 Out of 300

Dashboard page one data information

1. Display the date that the report is generated
2. Dataset 1 - SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) and Group By [ASPEN CLASSIFICATION] – display underneat each other
3. Dataset 2 - SELECT count(distinct Medpages_OrgCode) FROM [Rep_SSD_Daily_Sales_Monthly_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) and Group By [ASPEN CLASSIFICATION] – The total amount of pharmacies : SELECT count(distinct Medpages_OrgCode) FROM [Rep_SSD_Daily_Sales_Monthly_Sum] – is to get the total amount of pharmacies in this group – this selection is on whole year – dataset 2
4.

5. Dataset 1 – Line Chart - SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to display latest months sales totals per day. X axis is the days of latest or current month
6. Dataset 1 – % Sales growth- SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to get latest months sales totals then compare to total sales from previous month with same amount of days. For instance today is the 14 th – I can only compare up to 14 th of previous month to get accurate growth %
7. Dataset 1 – % customer growth- SELECT count(distinct [Medpages_OrgCode]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to get latest months customer count then compare to customer count from previous month with same amount of days. For instance today is the 14 th – I can only compare up to 14 th of previous month to get accurate growth %
8. Dataset 1 – % product growth- SELECT count(distinct [Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where [Tran_YearMonths] = Max([Tran_YearMonths]) – to get latest months product count then compare to product count from previous month with same amount of days. For instance today is the 14 th – I can only compare up to 14 th of previous month to get accurate growth %
9. Dataset 1 – select max(Tran_YearMonths) to display latest month in header in text box type
10. Dataset 1 - SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) – to display latest months sales total
11. Dataset 1 - SELECT count(distinct([Manufacturer_Product_Code])) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) to get count of customers for the max day. Then SELECT count([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] to get total products

Dashboard page one data information

12. Dataset 1 - SELECT count(distinct([Manufacturer_Product_Code])) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) to get count of customers for the max month. Then SELECT count([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] to get total customers

13. Dataset 1 - SELECT count(distinct(Medpages_OrgCode)) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths = max(Tran_YearMonths) to get count of customers for the max Month. Then SELECT count(Medpages_OrgCode) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] to get total customers

14. Dataset 2 –SELECT sum([LineTotal]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Sum] where Tran_YearMonths >= 201601 – to display years data per month sales total – THIS IS ON REPS TEAM AND TERRITORY. The top line is National coverage – show all territories but same team as rep – Filter on team

Date: 4 May 2016

Indep - East Rand : Basket : Independent 1

Customers group performance last 3 months

1 3 4 5 2 6

ASPEN CLASSIFICATION	# Potential customers	Total 3 months sales	# Customers Aug 16	# Customers Sep 16	# Customers Oct 16	Sales Oct 16
PHCY - CLICKS	5	16 191 366	5	5	5	766 615
INDEP - PHCY / DR	55	13 791 877	45	45	45	523 031
HOSP - MEDICLINIC	4	3 005 048	3	3	3	167 186
HOSP - LIFE	1	2 094 694	1	1	1	76 039
HOSP - NETCARE	2	541 418	2	2	2	16 379
COURIER	1	297 301	1	1	1	9 849
PHCY - SPAR	6	282 211	5	5	5	6 694
PHCY - MEDICROSS	5	169 761	4	4	4	4 755
HOSP - PVT	4	120 425	4	4	4	8 840
HOSP - MINES	2	107 164	1	1	1	1 414
HOSP - HOSPIFORMANCE	1	84 477	4	4	4	-7 317
PHCY - DISCHEM	4	80 714	3	3	3	5 943
HOSP - CLINIX	1	56 208				257
PHCY - MEDIRITE	3	37 124				2 419
PHCY - PICK N PAY	2	35 015				43

Dashboard page one data information

1. Dataset 2 – Display list of [ASPEN CLASSIFICATION] groups that are in the territory. Sort 4.
2. Dataset 2 – Display month names of last 3 months as headers of columns
3. Dataset 2 - SELECT count distinct ([Medpages_OrgCode]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum
4. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = ‘ product‘ and last 3 months total
5. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = ‘ product‘ and group by month to display month – last 3
4. Dataset 2 - select sum(line total) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum for latest month per group

Date: 4 May 2016

Indep - East Rand : Basket : Independent 1

Customers who bought products(SKU) last 3 months

PRODUCT 1	Potential # Customers -2016 3	Total Sales Value for 3 Months 4	# Customers Aug 16 5	# Customers Sept 16 2	# Customers Oct 16	TOTAL SALES VALUE FOR October 2016 6
DOLOROL FORTE TABS 50'S	234	R345	67	44	123	R 456
DICLOFENAC 50MG TABS 500'S	232	R34534	88	56	123	R 989
MYBUCOD TABS 30'S	200	R567	55	44	44	R789
LENAPAIN TABS 500'S	180	R78678	34	66	44	R3434
PANAMOR-75 SR TABS 30'S	45	R5464	45	23	23	R2334

Dashboard page one data information

1. Dataset 2 – Display list of products that the reps team sell. This will be the team parameter. Sort 4.
2. Dataset 2 – Display month names of last 3 months as headers of columns
3. Dataset 2 - SELECT count distinct ([Medpages_OrgCode]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum
4. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = ‘ product‘ and last 3 months total
5. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = ‘ product‘ and group by month to display month – last 3
4. Dataset 2 - select sum(line total) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum for latest month per group

Date: 4 May 2016

Indep - East Rand : Basket : Independent 1

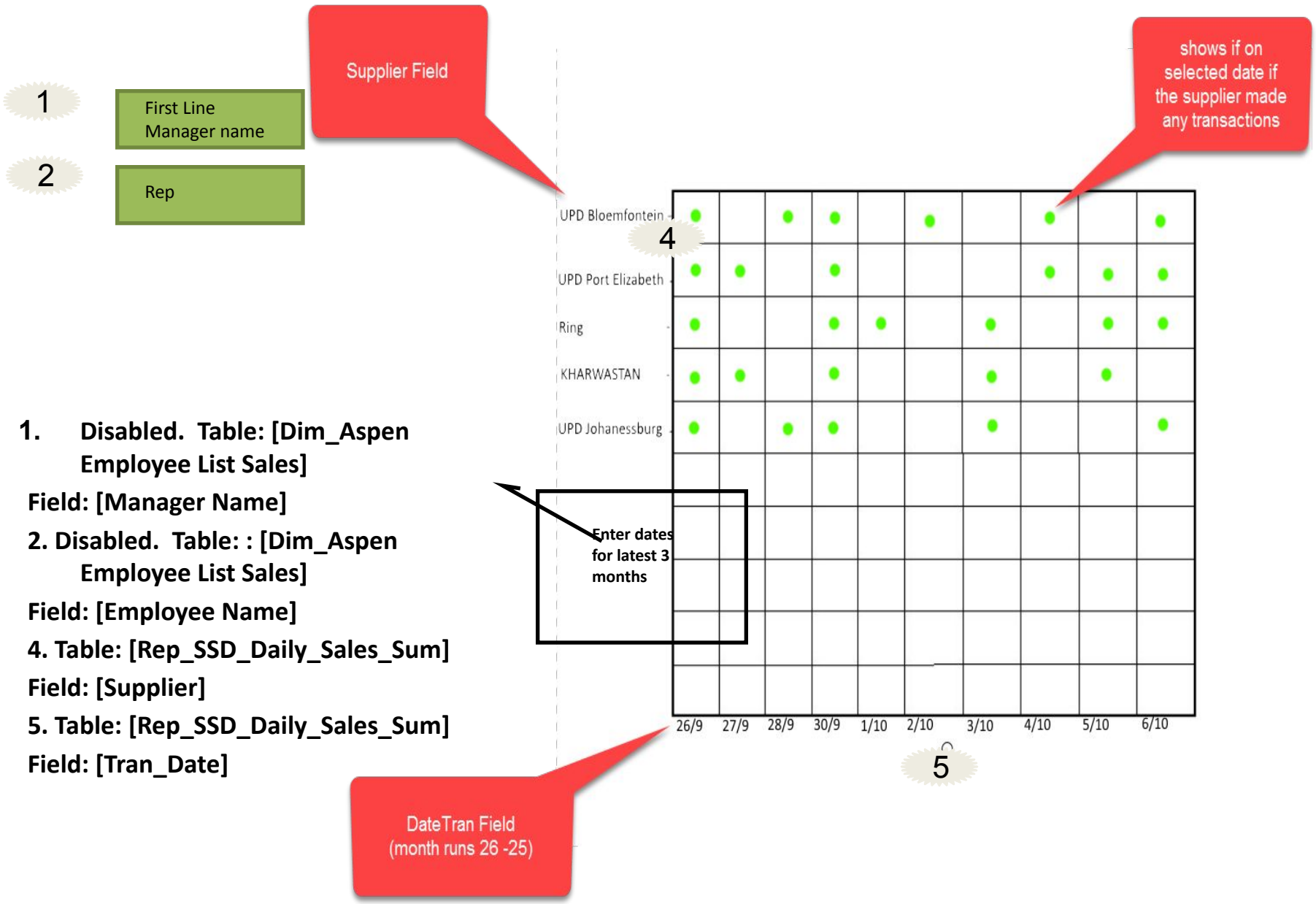
SKU(product) that was bought last 3 months by customers

PRODUCT 1	Potential #sku - 2016 3	Total Sales Value for 3 Months 4	# SKU bought in Aug 16 2	# SKU bought in Sept 16 5	# SKU bought in Oct 16	TOTAL SALES VALUE FOR October 2016
Customer 1	154	R323	67	44	123	R 456 6
Customer 2	120	R34534	88	56	123	R 989
Customer 3	110	R5345	55	44	44	R789
Customer 4	80	R5435	34	66	44	R3434
Customer 5	70	R34	45	23	23	R2334

Dashboard page one data information

1. Dataset 2 – Display list of customers that is in the reps territory. This will be the territory parameter. Sort 4.
2. Dataset 2 – Display month names of last 3 months as headers of columns
3. Dataset 2 - SELECT count distinct ([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum
4. Dataset 2 - SELECT sum(LineTotal) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = ‘ product‘ and last 3 months total
5. Dataset 2 - SELECT count distinct ([Manufacturer_Product_Code]) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum] where product = ‘ product‘ and group by month to display month – last 3
4. Dataset 2 - select sum(line total) FROM [AspenHQ].[dbo].[Rep_SSD_Daily_Sales_Monthly_Sum for latest month per group

Supplier Data Roster Aug 16 - Oct 16



1. **Disabled. Table: [Dim_Aspen Employee List Sales]**

Field: [Manager Name]

2. Disabled. Table: : [Dim_Aspen Employee List Sales]

Field: [Employee Name]

4. Table: [Rep_SSD_Daily_Sales_Sum]

Field: [Supplier]

5. Table: [Rep_SSD_Daily_Sales_Sum]

Field: [Tran_Date]