

## Spotlight - SERP - KPIs

### Preparation if using demo data attached

1. Import Demo Data

2. Login with

Standard ID: sample@hansaworld.com

Passworld: Sample99

3. Create Receipt

Create a new receipt in current month, so that the figure for your Sales Ledger Due is less then last month.

4. Login Details for KS

Standard ID: test@hansaworld.com

Password: Sample99

### Preparation for creating your own demo data

1. Import Demo Data

2. Make sure KPI's are activated

Module>>System>>Setting>>Configuration>>Basics>>KPI's

3. Setup KPI's

Module>>System>>Settings>>KPI

(Refer to Manual for setting up KPI's)

Setup for both users are per demo.

4. Second User

Make sure you have login details for the second users setup

As a manager, it is important to have all critical information at your fingertips to make immediate and accurate decisions. Instant visibility of business performance helps decision makers stay informed and saves time and money.

Using the KPIs feature in Standard ERP you will be able to access that information directly from your Navigation Centre.

For example, as the chief accountant, you can easily see the total value of overdue invoices from the KPIs defined, on this area of the Navigation Centre.

**ACTION: Show cursor on first KPI - Receivables**

You can immediately see that the receivable value has gone down this month, which is a good thing, but the value still seems on the high side. You can select Receivables to get more info

**ACTION: Show Receivables from KPI list**

Now you can quickly spot those large invoices that the team needs to deal with on an urgent basis;

**ACTION: Scroll up and down on the Sales Ledger report, and open 1 invoice on the report**

In just one click you are able to make critical decisions because the information you need is instantly visible.

**ACTION: Select the Key Icon on the Navigation Centre**

lets log in as the sales manager

**ACTION: Standard ID: test@hansaworld.com, Password: Sample99**

You can now visually see that both the value and number of quotes has gone up and the pipeline is looking very nice for this month.

**ACTION: Move Cursor over Quotations and Pipeline Names**

You can again drill down on the pipeline to get more details and focus on the more important quotations with higher probability.

**ACTION: Select Pipeline from the KPI's, scroll down and up, and open Quotation 21100006**

Key Performance Indicators are an Integral part of any business. Get instant insight into how your business is performing with this functionality in Standard ERP.