

# Enterprise

by HansaWorld

Integrated Accounting,  
CRM and ERP System for  
Mac OS X, Windows,  
Linux, iOS, Android and AIX

Key Performance Indicators (KPIs)

Program version: 7.1 131231

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# Preface

The Enterprise by HansaWorld range of products contains a number of powerful accounting, CRM and ERP systems for the Windows, Mac OS X, Linux, iOS, Android and AIX environments.

The programs are designed to make administration and accounting as easy and fast as possible. They are similar in operation regardless of platform. In the specific areas where there are significant differences, these are described and illustrated in full. In all other cases illustrations are taken from the Windows 7 version.

Text in square brackets - [Save], [Cancel] - refers to buttons on screen.

Information in this document is subject to change without notice and does not represent a commitment on the part of HansaWorld. The Software described in this document is a sophisticated information management system. Features are liable to alteration without notice. This documentation is not intended as a *de facto* representation of the system, but as an overview of its facilities. It cannot be exhaustive in all respects. Whilst effort is made to ensure the accuracy of the information published concerning the features and use of HansaWorld software, it is still possible that certain functions mentioned may not be fully implemented, may not be available under certain circumstances, or may possibly relate to a future release of the software. Errors and omissions excepted. HansaWorld accepts no contingent liabilities. All HansaWorld software related transactions are subject to HansaWorld's Conditions of Sale and Software Licence Agreement. All rights reserved.

## KPIs

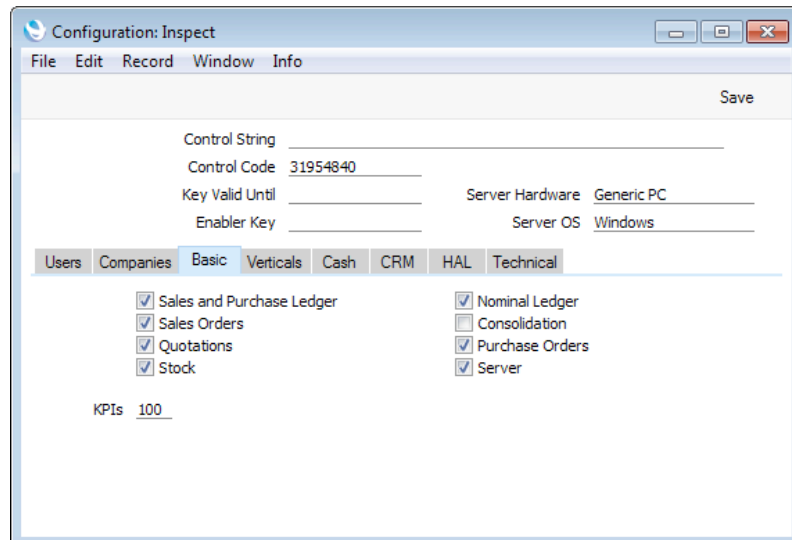
KPIs are Key Performance Indicators, visible in the bottom right-hand corner of the Master Control panel. KPIs summarise the activity of the company in specified areas during the current week, month or year, and compare that activity with the previous period. By default, KPI figures will be updated automatically every hour, to keep you up-to date.

Depending on how an individual KPI has been configured, you may be able to click on it in your Master Control panel and be taken to a web page. A useful web page might be your HansaWorld SmartView page where you can analyse the statistics in more detail. Please refer to your local HansaWorld representative for more information about HansaWorld SmartView. If no web page has been assigned to a KPI, clicking on it will open a report showing how the KPI figure has been calculated. For example, clicking on a "Sales Excluding VAT" or "Sales Including VAT" KPI will cause an Invoice Journal report covering the relevant period to be opened.

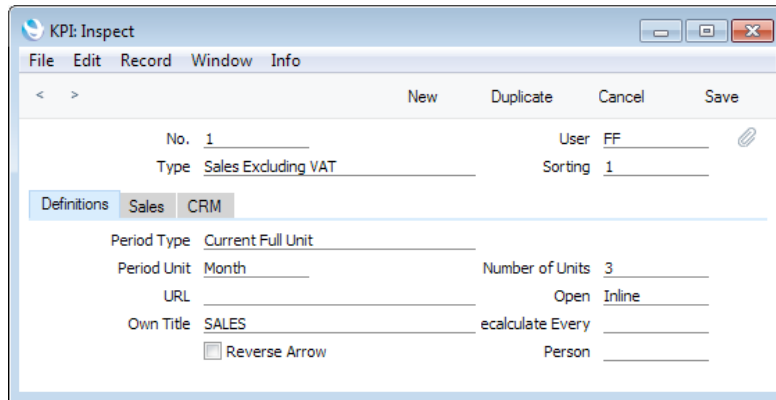
You can configure your company's KPIs so that different ones will be seen by different users. So, if someone else logs in to Enterprise by HansaWorld on your machine using the [Login] button in the Master Control panel, your KPIs will disappear, to be replaced with theirs.

Use the KPIs setting to configure the Key Performance Indicators that will be shown in each user's Master Control panel. To work with this setting, follow these steps—

1. The KPI feature is an extra-cost addition to the standard Enterprise by HansaWorld system. The first step is therefore to specify the number of KPIs you have purchased in the field on the 'Basic' card of the Configuration setting in the System module—

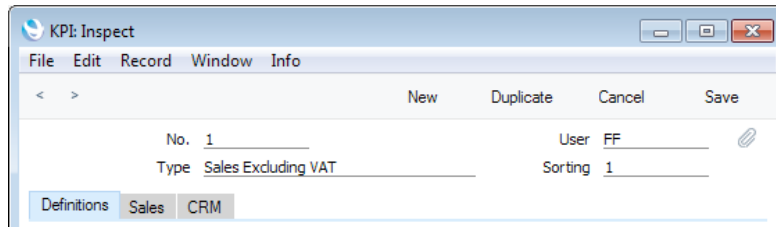


- The second step is to configure your KPIs. Remaining in the System module, open the KPIs setting and create a new record—



Complete the record as follows—

## Header



- No.** The unique identifier for the KPI record, generated automatically.
- User** **Paste Special** Person register, System module  
Specify here the Person in whose Personal Desktop the KPI is to appear. You can enter more than one Person, separated by commas.  
If you need to use 'Paste Special' to enter several Persons, type the comma or colon before opening the 'Paste Special' list. This will cause the next Person to be added to those already entered. Otherwise, the previous Person will be overwritten.  
If you enter more than one Person, this will cause the KPI record to take up more than one of your KPI "slots". For example, if you have purchased 100 KPIs and you enter a KPI record containing three Persons in its User field, this KPI record will occupy three of those 100 KPIs.
- Type** **Paste Special** Choices of possible entries  
Use this field to specify the figure that will be monitored by the KPI. The following options are available—

### Activities Cost Time

The total Cost (Time) from Time Activities with Start Dates falling within the period. A Time Activity is one where the Task Type is Calendar and the Calendar Type is Time. If an Activity has more than Person, it will be included in the KPI figure once for each

	Person. Clicking the KPI in the Master Control panel will open the Activities, Persons report.
<b>Cost of Sales</b>	The total cost of sales from approved Invoices dated during the period. Clicking the KPI will not open a report.
<b>GP%</b>	The gross margin of approved Invoices dated during the period. Clicking the KPI will open the GP, Invoices report.
<b>No. of Activities</b>	The number of Time Activities with Start Dates falling within the period. If an Activity has more than Person, it will be included in the KPI figure once for each Person. Clicking the KPI will open the Activities, Persons report.
<b>No. of Orders</b>	The number of Sales Orders dated during the period. Closed Orders are not included. Clicking the KPI will open the Order Journal report.
<b>No. of Quotations</b>	The number of Quotations dated during the period. Closed and Rejected Quotations are not included. Clicking the KPI will open the Quotation Journal report.
<b>Outstanding Orders</b>	The value excluding VAT of Sales Orders dated during the period. Invoiced and Closed Orders are not included. Clicking the KPI will open the Outstanding Orders report (this report doesn't have a period selection so the figures it shows will not match the KPI figures).
<b>Outstanding Quotations</b>	The value excluding VAT of Quotations dated during the period. Closed and Rejected Quotations are not included. Clicking the KPI will open the Pipeline report (this report doesn't have a period selection so the figures it shows will not match the KPI figures).
<b>P/L Due</b>	The outstanding total from unpaid Purchase Invoices that have exceeded their Payment Terms (i.e. whose Due Date has passed). This figure can also be seen at the bottom of the Purchase Ledger report. Clicking the KPI will open the Purchase Ledger report.
<b>P/L On Acc.</b>	The On Account balance in the Purchase Ledger, including open On Account Payments and open Prepayments for all Suppliers. This figure can also be seen at the bottom of the Purchase Ledger report. Clicking the KPI will open the Purchase Ledger report using the Only On Account option.
<b>Receipts</b>	The value of Receipts taken during the period. Clicking the KPI will not open a report.

**Sales Excluding VAT**

The value excluding VAT of approved Invoices dated during the period. Clicking the KPI will open the Invoice Journal report.

**Sales Including VAT**

The value including VAT of approved Invoices dated during the period. Clicking the KPI will open the Invoice Journal report.

**S/L Due excluding Disputed Invoices**

The outstanding total from unpaid Invoices that have exceeded their Payment Terms (i.e. whose Due Date has passed) and that have not been marked as Disputed. Clicking the KPI will open the Sales Ledger report using the Exclude Disputed option.

**S/L Due**

The outstanding total from unpaid Invoices that have exceeded their Payment Terms (i.e. whose Due Date has passed). This figure can also be seen at the bottom of the Sales Ledger report. Clicking the KPI will open the Sales Ledger report.

**S/L On Acc.**

The On Account balance in the Sales Ledger, including open On Account Receipts and open Prepayments for all Customers. This figure can also be seen at the bottom of the Sales Ledger report. Clicking the KPI will open the Sales Ledger report using the Only On Account option.

**Sorting**

Use this field to control the order in which the KPIs will be listed in the User's Personal Desktop. For example, a KPI with "1" in its Sorting field will be listed above a KPI whose Sorting is "2". You should only enter whole numbers in this field.

**Definitions Card**

Definitions	Sales	CRM
Period Type	Current Full Unit	
Period Unit	Month	Number of Units 3
URL		Open Inline
Own Title	SALES	recalculate Every
<input type="checkbox"/> Reverse Arrow		Person

<b>Period Type</b>	<b>Paste Special</b>	Choices of possible entries
		<p>The KPI display in the User's Personal Desktop includes figures for a Previous period (in the column headed "Prev.") and for the Current period (in the column headed "Current").</p> <p>This field controls how the Prev. and Current periods relate to each other. For example, if the current date is 10 June, the Period Length (below) is "Month" and the Number of Units is 1, the Prev. and Current figures will be calculated as follows, depending on the option in this field—</p>
	-	<p>Current: 10 June - 10 June</p> <p>Previous: 10 June - 10 June</p>
		<b>Until Current Date</b>
		<p>Current: 11 May - 10 June</p> <p>Previous: 11 April - 10 May</p>
		<b>Current Full Unit</b>
		<p>Current: 1 June - 30 June</p> <p>Previous: 1 May - 31 May</p>
		<b>Current Unit, Until Current Date</b>
		<p>Current: 1 June - 10 June</p> <p>Previous: 1 May - 10 May</p>
<b>Period Unit</b>	<b>Paste Special</b>	Choices of possible entries
		Use this field to specify whether the KPI will display weekly, monthly or yearly figures.
<b>URL</b>		<p>If you want the User to be taken to a web page when they click the KPI in their Personal Desktop, specify the URL of that web page here. A useful URL might be your HansaWorld SmartView page where you can analyse the statistics in more detail. Please refer to your local HansaWorld representative for more information about HansaWorld SmartView.</p> <p>You must include the http:// or https:// in the URL that you enter in this field.</p> <p>If you leave this field empty, clicking the KPI will open a report showing how the KPI figure has been calculated. The reports that will be opened from each KPI Type are included in the descriptions of the Type options above.</p>
<b>Own Title</b>		Specify the name of the KPI, to be shown in the KPI Display in the Personal Desktop.
<b>Reverse Arrow</b>		This check box controls the arrow that is shown in the Trend column in the Personal Desktop. By default, if the Current figure is larger than the Prev. figure, the Trend column will contain an upward-pointing arrow. This will be appropriate if the KPI is one where a larger Current figure is a positive trend (e.g. "No. of Quotations" or "Sales Including VAT"). In some cases, however, a larger Current figure is a negative trend (e.g. "S/L Due") and therefore a downward-pointing arrow is more appropriate. Use the Reverse Arrow option in these cases.


**Number of Units** This field is related to the Period Unit field above: use it to specify how many Period Units are to be included in the Current and Prev. in the KPI Display.

For example, if the Period Type is "Month" and you enter "3" in this field, the Current period will cover the current quarter and the Prev. period will cover the previous quarter.

**Open** **Paste Special** Choices of possible entries

If you have specified a URL in the field on the left and the User clicks the KPI in their Personal Desktop, they will be taken to the relevant web page. If you enter "Inline" here, the web page will be opened in a new window inside Enterprise by HansaWorld. If you enter "External" here, the web page will be opened in the User's default browser.

**Recalculate Every** By default, the KPI figures in the User's Personal Desktop will be updated once an hour. If you would like them to be updated more (or less) often, specify here the time between updates that you need. Use the format hh:mm:ss.

If you need an immediate update of the KPIs in your Personal Desktop, click the  button at the top of the list (Mac OS X only).

**Person** **Paste Special** Person register, System module

Use this field if you need KPI figures to be calculated for a particular Person or Persons.

For example, if the Type is "No. of Orders", leaving this field empty will mean the KPI will display the total number of Orders created during the period and the previous period. If you enter a Person's Signature, the KPI will display the number of Orders created by that Person.

Unless the Type is "Activities Cost Time" or "No. of Activities", you can enter more than one Person, separated by commas. If you need to use 'Paste Special' to enter several Persons, type the comma or colon before opening the 'Paste Special' list. This will cause the next Person to be added to those already entered. Otherwise, the previous Person will be overwritten.

For the following Types, the KPI figure will be calculated from Sales Invoices where the specified Person (or one of the specified Persons) is the Salesman—

- Cost of Sales
- Sales Excluding VAT
- Sales Including VAT
- S/L Due
- S/L Due excluding Disputed Invoices
- GP%

For the following Types, the KPI figure will be calculated from Purchase Invoices where the specified Person (or one of the specified Persons) is the Salesman—

- P/L Due



For the following Types, the KPI figure will be calculated from Quotations where the specified Person (or one of the specified Persons) is the Salesman—

- No. of Quotations
- Outstanding Quotations

For the following Types, the KPI figure will be calculated from Sales Orders where the specified Person (or one of the specified Persons) is the Salesman—

- No. of Orders
- Outstanding Orders

For the following Types, the KPI figure will be calculated for Customers and Suppliers in whose Contact records the specified Person (or one of the specified Persons) is the Salesman—

- P/L on Acc.
- S/L on Acc.

For the following Types, the KPI figure will be calculated from Time Activities where the specified Person is included in the Persons field. You should not specify more than one Person in the KPI: if you do, the KPI figure will be zero—

- Activities Cost Time
- No. of Activities

## Sales Card

Definitions	Sales	CRM
Item	_____	Group _____
Classification	_____	

### Item

### Paste Special

### Item register

Use this field if you need KPI figures to be calculated for a particular Item.

For example, if the Type is “No. of Orders”, leaving this field empty will mean the KPI will display the total number of Orders created during the period and the previous period. If you enter an Item Number, the KPI will display the number of Orders containing that Item.

You can use this field with the following KPI Types—

- Cost of Sales
- GP %
- No. of Orders
- No. of Quotations
- Outstanding Orders
- Outstanding Quotations
- Sales Excluding VAT
- Sales Including VAT

<b>Classification</b>	<b>Paste Special</b>	Item Classifications setting, Sales Ledger
		Use this field if you need KPI figures to be calculated for Items belonging to a particular Classification. It operates in the same manner as the Item field described immediately above, and can be used with the same KPI Types.
		If you enter a number of Classifications separated by commas, KPI figures will be calculated for the Items belonging to all the Classifications listed.
<b>Group</b>	<b>Paste Special</b>	Item Group register, Sales Ledger
		Use this field if you need KPI figures to be calculated for Items belonging to a particular Item Group. It operates in the same manner as the Item field described immediately above, and can be used with the same KPI Types.

### CRM Card


The screenshot shows a software interface with three tabs: 'Definitions', 'Sales', and 'CRM'. The 'CRM' tab is selected. Below the tabs, there are two input fields: 'Act. Type' followed by a horizontal line, and 'Act. Type Class.' followed by a horizontal line.

<b>Act. Type</b>	<b>Paste Special</b>	Activity Types setting, CRM module
		Use this field if you need KPI figures to be calculated for a particular Activity Type.
		For example, if the Type is “No. of Activities”, leaving this field empty will mean the KPI will display the total number of Activities created during the period and the previous period. If you enter an Activity Type, the KPI will display the number of Activities with that Activity Type.
		You can use this field with the following KPI Types—
		<ul style="list-style-type: none"> <li>• Activities Cost Time</li> <li>• No. of Activities</li> </ul>
<b>Act. Type Class.</b>	<b>Paste Special</b>	Activity Classes setting, CRM module
		Use this field if you need KPI figures to be calculated for Activities with Activity Types belonging to a particular Activity Class. It operates in the same manner as the Act. Type field described immediately above, and can be used with the same KPI Types.

3. Save the KPI record. As soon as you do so the KPI will be added to the User's Personal Desktop—

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KPI	Previous	Current	Trend
SALES		8856.50	126.00

By default, KPI figures will be updated once an hour. If you would like to update them immediately, click the  button to the right of the Trend column (this button is only available if you are using Mac OS X).