How to use Salesperson Dashboard in effectmanager

This guide shows you how to use the Salesperson Dashboard in the effectmanager Reports module.

This guide is only of relevance if you have the online POS reports module in effectmanager.

The Salesperson Dashboard gives you a speedometer report, showing how you are performing on segments in a store compared to the overall chain index.

Data shown is Turnover Index YTD. This POS report uses your categorization on wholesaler POS data.
NB! If some products are not categorized with your own data, it will not be included in the Index calculations for the segment.

If you need a guide that shows you how to maintain your product categorization, please see our guide [How to maintain categorization of POS data](#)

👍 **Pro tip:** This report is a very useful report for your Sales Reps. It provides a quick insight before visiting a store - having a talk with the store about performance based on their own Sales Figures.
It can be set-up, so the Salesperson Dashboard report is the first page they will see when logging into effectmanager.

If you want this set-up, please contact our support team at support@effectmanager.com

[See our 30-second video for the Salesperson Dashboard online in the Knowledge Base article.](#)

Salesperson Dashboard

This POS report will provide you with a speedometer report based on your filtering selections for Store, Salesperson, and Segment comparing Turnover Index on your master data segments.

The Salesperson Dashboard always shows YTD.
NB! Your filter is always saved when navigating between POS reports.

In the report, you can select one or more values in the Segment filter. You just click on the filter you want to see on the same report.
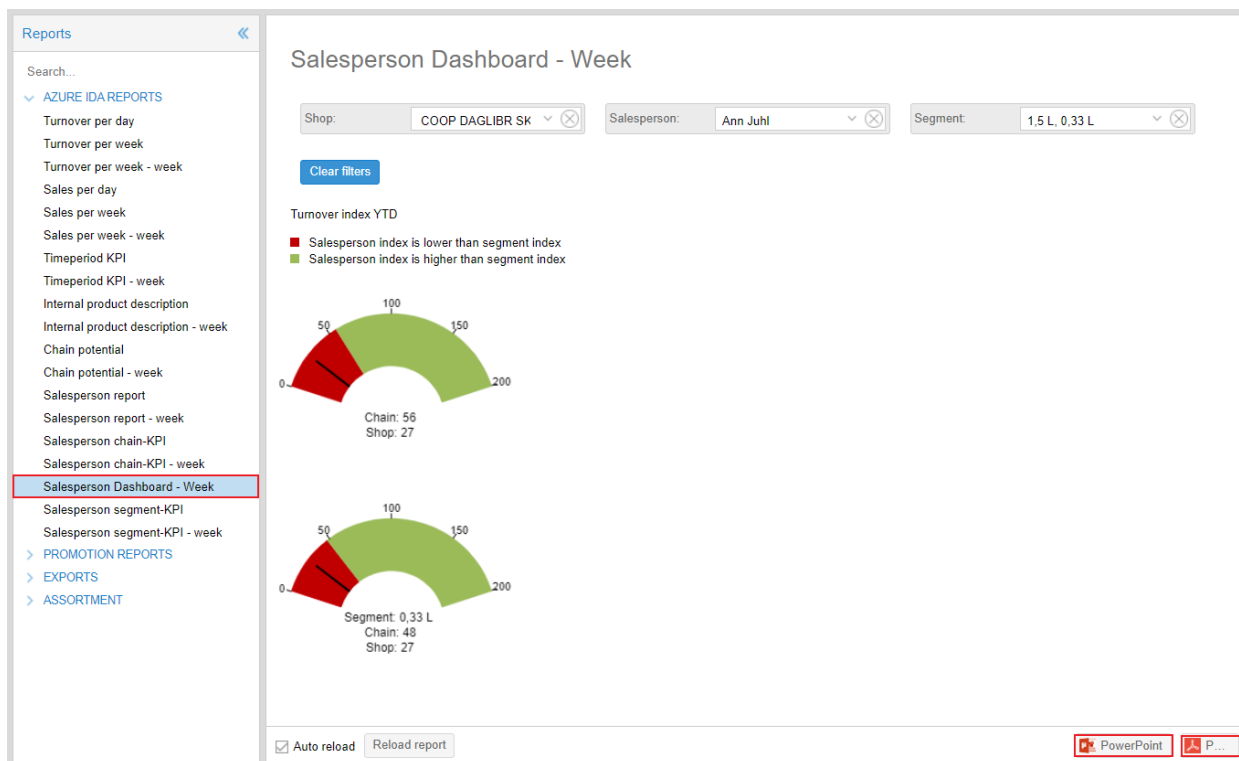
⚠️**OBS!** Sales reps must be aware when using this report, that the Turnover Index may change if POS data for the wholesaler is not uploaded at the time, they are looking at the report the first time.

In the example below I have selected Salesperson Ann Juhl, Store COOP DAGLIBR SKYTTEGÅRDEN, and Segments 0,5 L and 1,5 L.

I get a speedometer report with the Chain and Shop index but also a speedometer report for each segment selected in the filter comparing chain and shop index for each segment.

See example on the next page

> 👍 **Pro tip:** To clear filters in the Salesperson Dashboard simply click the X in the filter.

The POS report can be exported to PowerPoint and PDF by pressing the icons at the bottom of the report.