DNav-bi/Radar Training Outline

Kerridge DNav-bi is a reporting tool that uses system data to run analysis’s on sales data as well as open orders, unprocessed orders, and purchase orders. This tool can also use comparison time frames to identify movements in any many areas of business. There is also a tremendous drilldown capability that allows us to really do some very detailed reviews.

The Sales Analysis is the main option we use on this product for analysis.

**Main Page Filter and Options Review**

* Required Filters
  + Time frame and comparisons
* Required Variables
  + X by Y main sorts
* Additional Options
  + Can make customer friendly reports using these options
* Display Attributes
  + Sort direction and record count control for results.
* Optional Filters
  + Fine tuning

**Basic Sales Analysis – 1 layer**

* Demonstrate a basic analysis setting up from scratch. “MTD sales per Branch”.
* Ask someone about a basic data point they want to explore and set up filter to report it.

**Intermediate Sales Analysis – 2 layers**

* Add another layer to the initial analysis from before. “Add Item”
* Remove Item and add Item Class 1 “Floor Tile and Wall Tile”
* Show example of changing the required variables “X” to Customer Type and Manufacture. This shows you then breakdown of Floor and Wall Tile sales by Customer Type.

**Advanced Sales Analysis – Multiple layers**

* Start with the base analysis of “MTD sales per Branch”
  + Add Ship Via for OT “LTD Delivery”
  + Add Route Code “HA” for scheduled delivery in Cincinnati”
  + The result will show sales analysis by delivery route “Day”

**Comparison Analysis – Like timeframes**

* Build a manufacture YTD sales analysis and use comparison of LYTD.
* Then show a drilldown by Customer Type.

**Drilldown while in Analysis**

* While still in the last analysis use the drilldown option to show the “Alice and Wonderland rabbit hole”.
* Demonstrate examples of Drilldown options and how it is helpful.
* Show how to step back one step verses closing the window.

**Export Options & Invoice Workbook**

* XLS/XLSX and PDF
* Show invoice workbook detail of download.

**How to Save Filters and how to use Save Filters**

* Demonstrate how to save a filter for future use.
* Show how to retrieve saved filters after they are saved.
* Explain the difference with Public and Private filters.
* Talk about how easy it is to delete a saved public filter.