Using the Dashboard

June 12, 2012

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About the Dashboard

The Dashboard is a business monitoring tool with fast, convenient measurement and monitoring items for a club or group of clubs. Dashboard shows up to four items at one time, and you can store items in groups called *Favorites*.

The Dashboard offers data and monitoring items in the following categories:

- Club Performance
- Sales/Receivables
- Members
- Employees
- Inventory

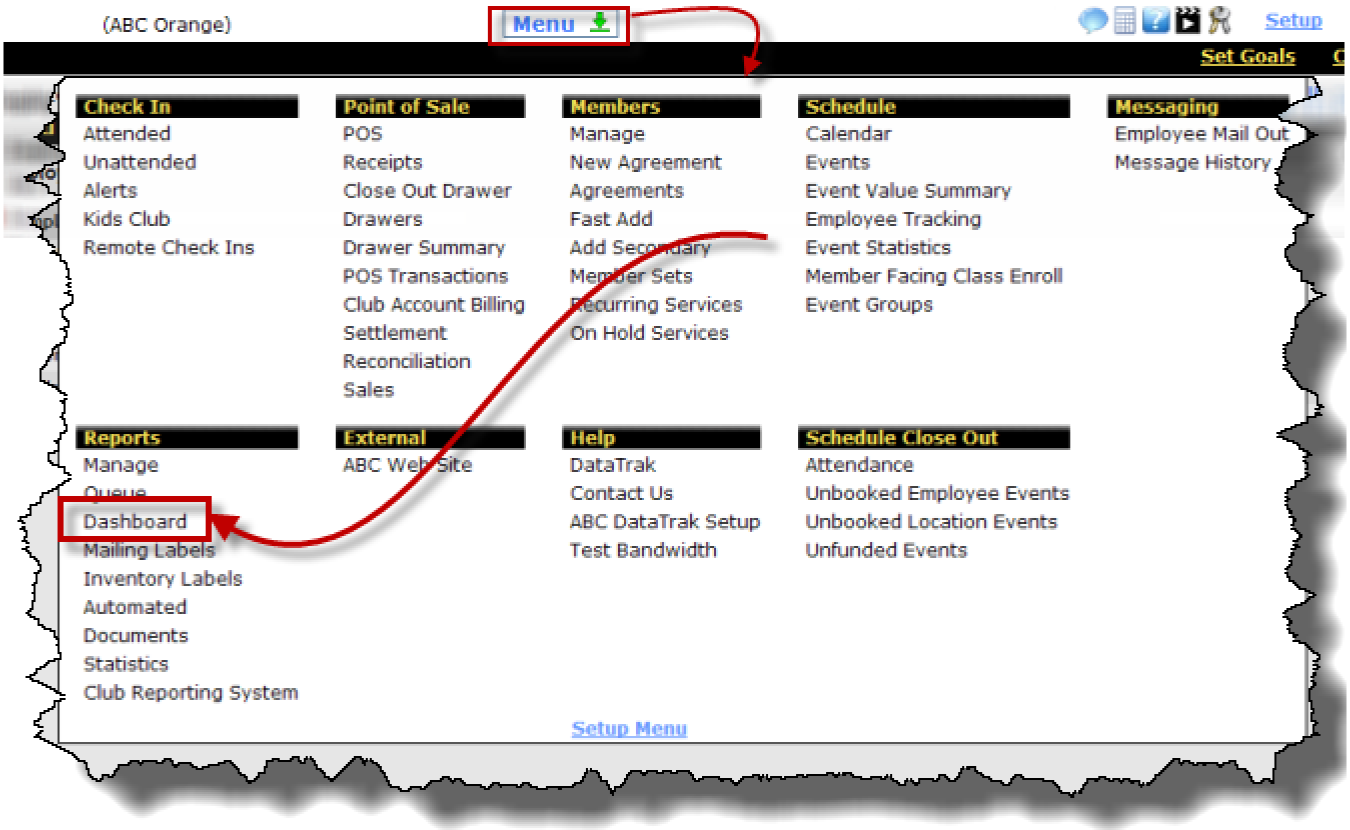
Note: For more information about the information and measurements you can track in Dashboard, see **Available Display Items and Data**.

Dashboard offers you full, versatile control over your monitoring choices. Manipulate items by changing filters, and save groups of items and their settings into Displays to reuse later.

The following image shows an example of a Dashboard Display. However, there are more items and options available than can be shown on a single display.

Opening the Dashboard

Find the Dashboard in the Reports section of the DataTrak menu.



To open the Dashboard:

1. Click **Menu**.
2. Click the **Dashboard** link, in the Reports section of the DataTrak menu.

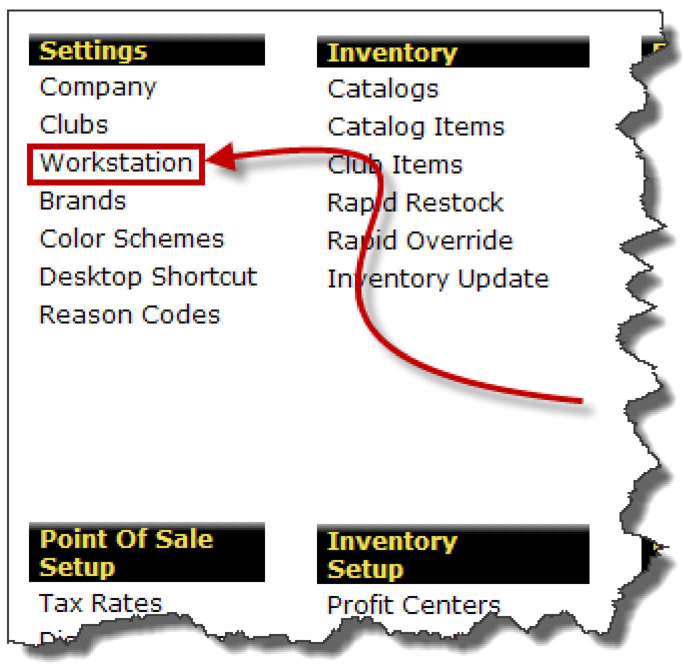
Setting the Dashboard to Open when DataTrak Starts

To ensure that the Dashboard is the first thing you see when DataTrak starts, set Dashboard as the default for the workstation.

To set the Dashboard as the workstation default:

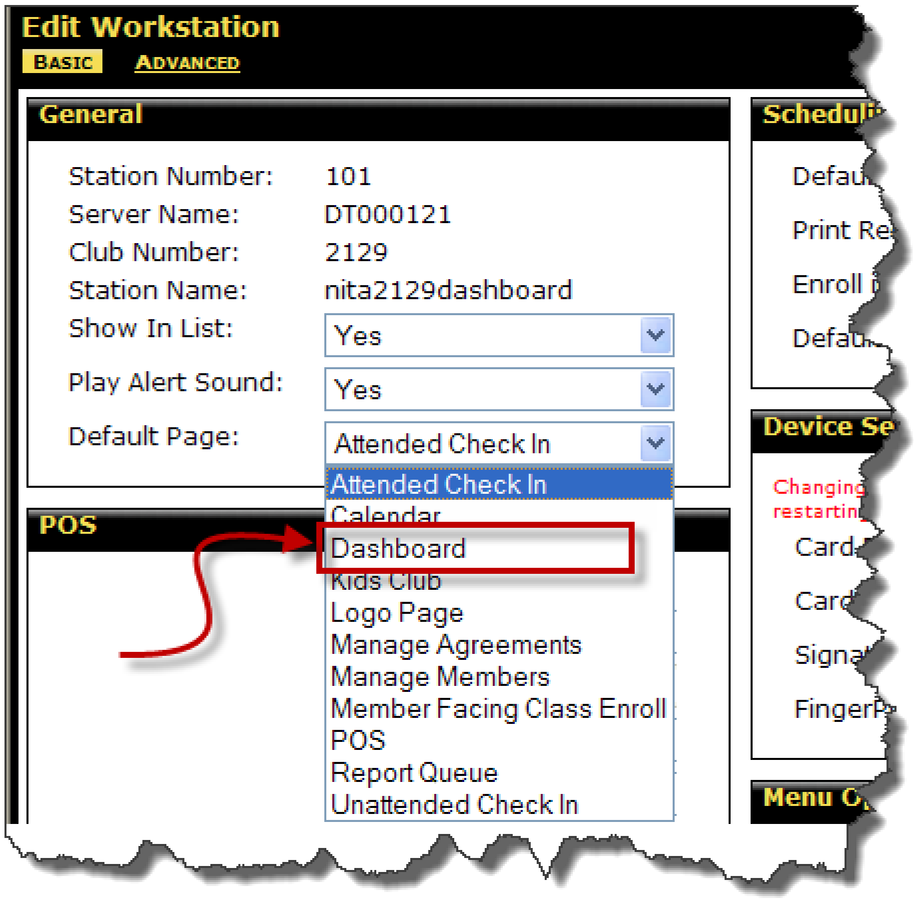
1. Click the **Setup** link in the upper-right corner of DataTrak.

2. Click **Workstation** in the Settings section of the DataTrak Setup Menu.



The Edit Workstation page opens.

3. Select **Dashboard** from the Default Page menu.



4. Click **Save**.

Using the Dashboard Interface

While the data fields, views, and filtering options vary among items, Dashboard and its reports use the same core conventions.

Working with Favorites

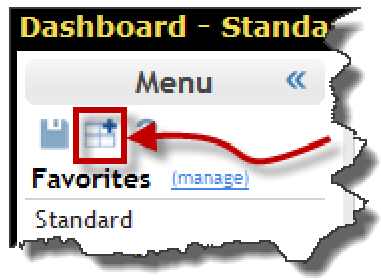
With Dashboard, you can have as many Favorites as you have tasks or needs for data snapshots. Dashboard Favorites are groups of between one and four items, saved under a name you choose, and retain their configuration settings once they are saved. Once you configure items and save them into a Favorite, you can use the same settings again and again.

Creating a New Favorite

Many people find it easiest to start from a new, blank display.

To create a new Favorite:

1. If necessary, show the Sidebar menu. For more information, see Showing the Sidebar Menu.
2. Click the **New Favorite** button. The following image shows an example of the New Favorite button.



DataTrak creates a new, unsaved Favorite with four item panels.

Adding Items to a Favorite

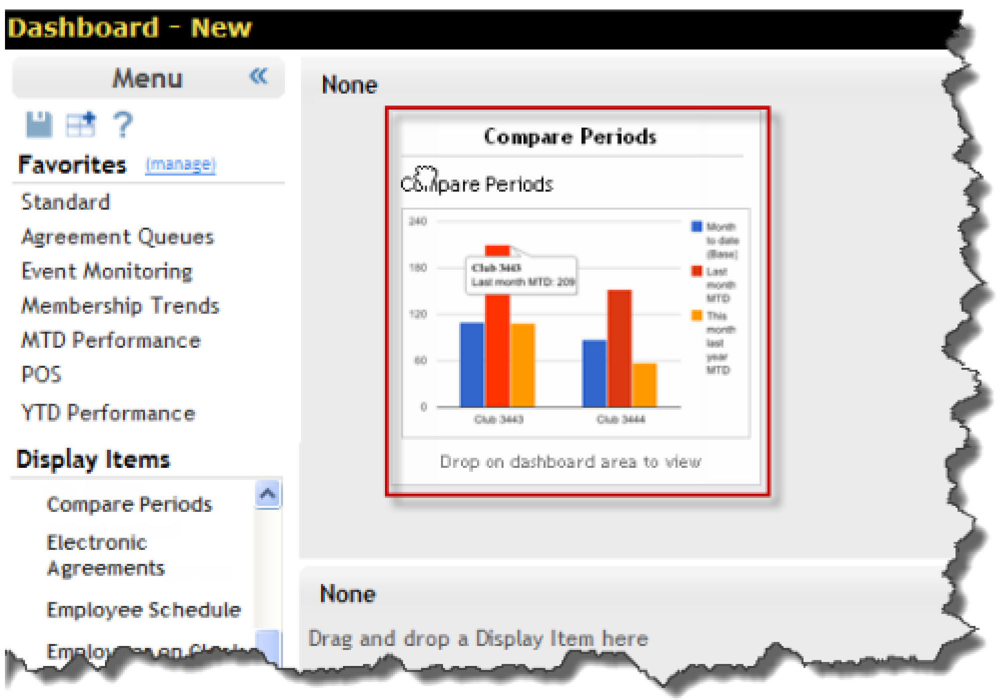
When you add items to a Favorite, you either add the item to an empty panel on the Display, or you can replace an existing item on the display.

Warning! Dashboard does not permanently save the contents of a Favorite or the settings of its items **until you save the Favorite**. For more information, see Saving Favorites.

To add an item to a Favorite:

1. If necessary, display the Sidebar menu. For more information, see Showing the Sidebar Menu.
2. Click the name of a Display Item Category to show its items. For more information about the data and configuration options for Dashboard Display Items, see Available Display Items.
3. Drag the item onto the Display.

Note: You can preview a Display Item before adding it to the Favorite. For more information, see Previewing a Display Item.



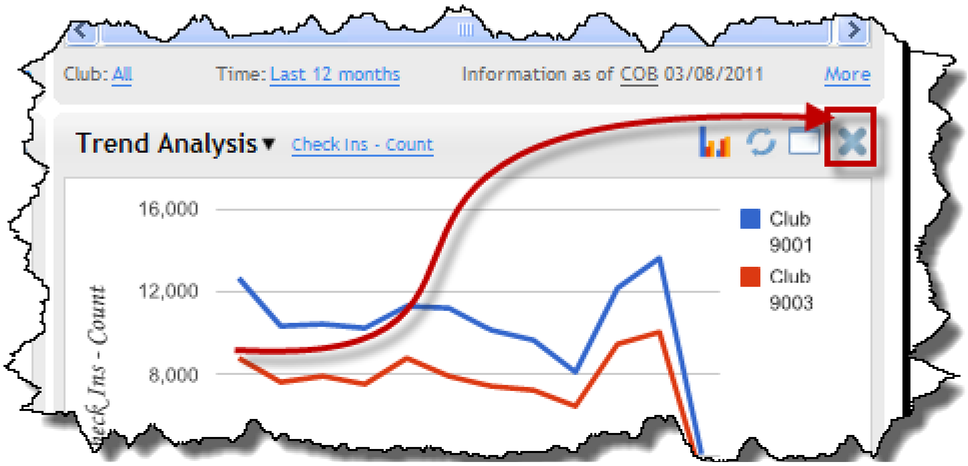
4. Release the mouse button to drop the item.

Removing Items from a Favorite

In addition to replacing an item currently on a Favorite, you can also remove it to show a blank panel.

To remove an item from a Favorite:

- Click the **Close Item** button in the upper-right corner of the item.



Saving Favorites

Saved Favorites appear in alphabetical order in the Sidebar Menu.

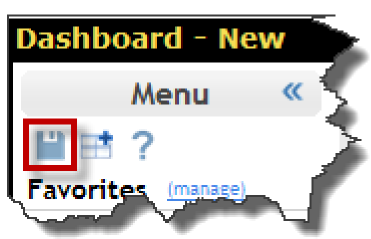
Saving Favorites is one of the best ways to use Dashboard. Save a Favorites to do any of the following:

- Retain the settings for an item or group of items
- Use the Favorites over and over again
- Set the Favorites to appear by default

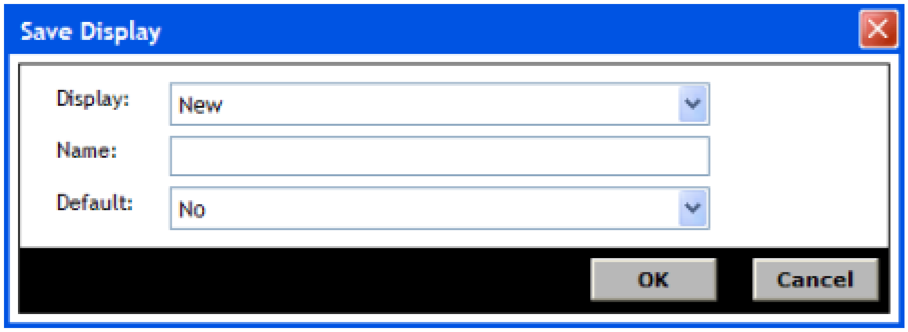
Saving a Favorite with a New Name

To save a Favorite with new name:

1. Click the **Save Favorite** button in the Sidebar menu. For more information, see Showing the Sidebar Menu.



The Save Favorite dialog opens.



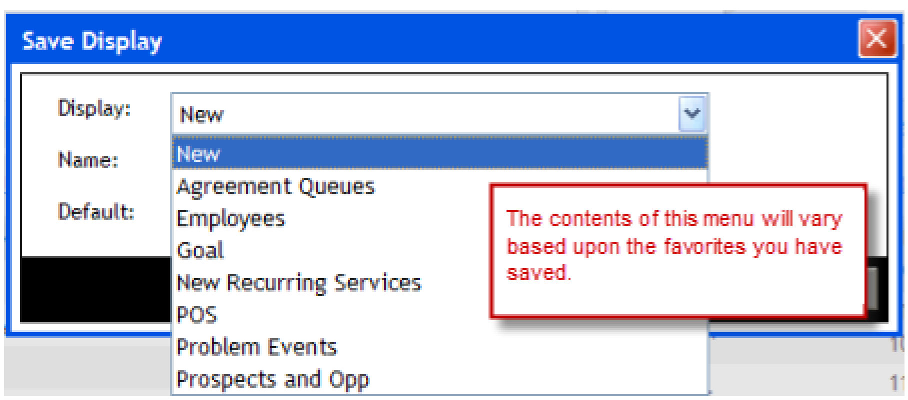
2. If necessary, select **New** from the Favorite menu.
3. Type the name for the new Favorite into the Name field.
4. Click **OK**.

Saving a Favorite with an Existing Name

To save a Favorite using an existing name:

1. Click the Save Favorite button in the Sidebar Menu. If necessary, display the Sidebar menu. For more information, see Showing the Sidebar Menu.

2. Select the name to use from the Favorite menu.



3. Click **OK**.

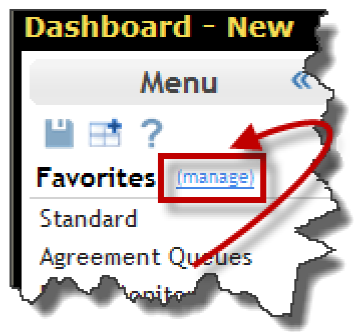
Note: Saving a Favorite with an existing name is the same as using the “Save As” function in many other programs. You will replace the contents and settings of the Favorite you select.

Making Default Favorites

The default Favorite is the favorite that appears when the Dashboard page opens.

To set a Favorite as the default:

1. Click the **Manage Favorites** link.



2. Locate the Display in the list.
3. Click the **Make Default** link for the Favorite.

Dashboard places a check mark (✓) in the Default column for the display.

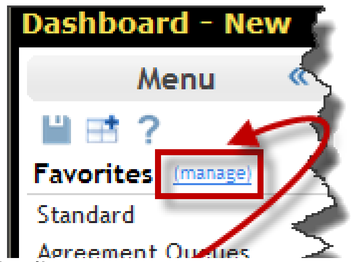
4. Click **Close**.

Deleting Favorites

Deleting a Favorite does not delete any data, just the saved settings for the items.

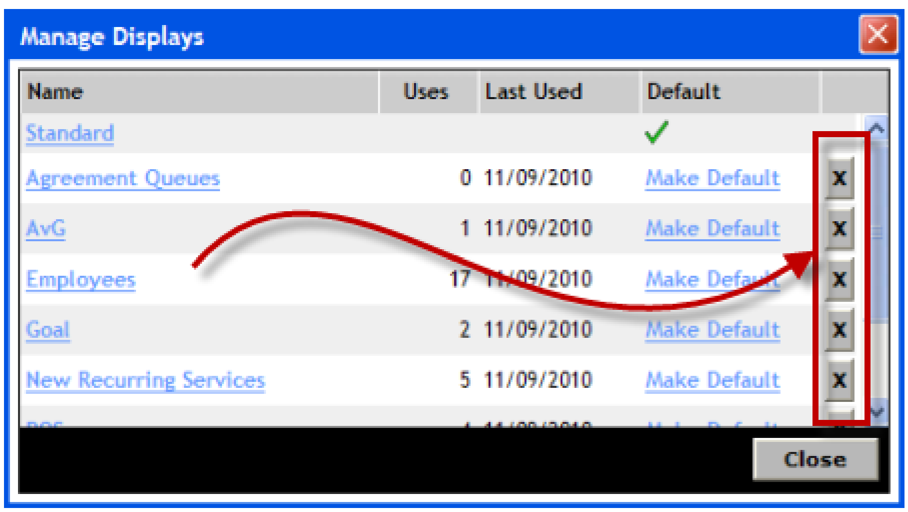
To delete a Favorite:

1. Click the **Manage** link. If necessary, display the Sidebar menu. For more information, see Showing the Sidebar Menu.



2. Locate the Display in the list.

3. Click the **Delete** button (x) for the Favorite.



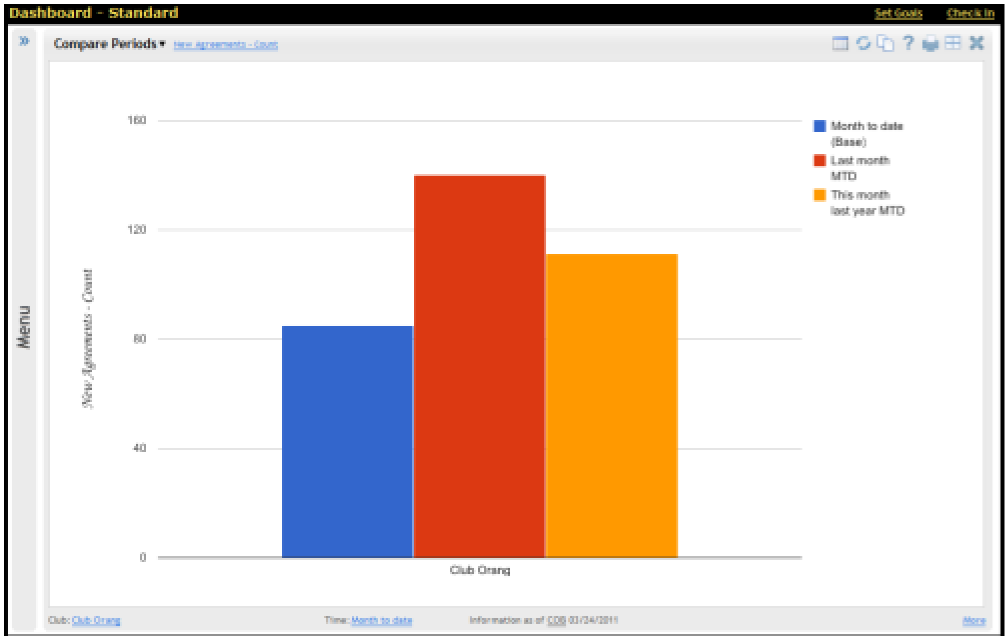
Dashboard deletes the Favorite.

4. Click **Close**.

Changing Item Sizes

You may display items in one of two sizes, a maximized view or tiled view. You can use these views with any item on a Favorite.

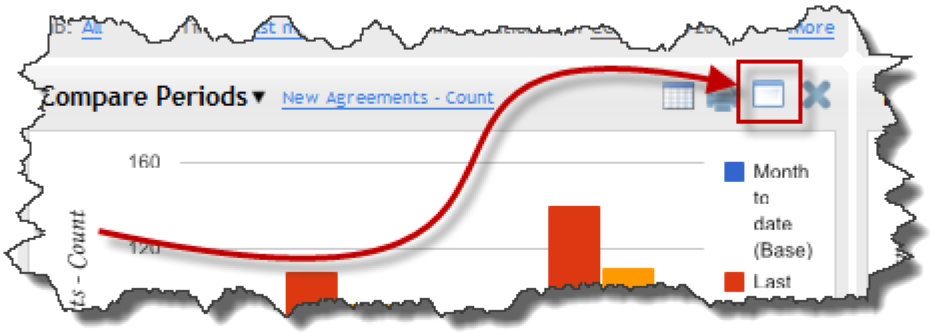
- *Maximized* view shows a larger version of the report, filling the full Dashboard area.



- *Tiled* view shows up to four reports, each one-fourth of the Dashboard area.

To change a report's view to maximized

- Click the **Maximize** button, in the upper-right corner of the item.



To change the report view to tiled

- Click the **Tile** button, in the upper-right corner of the item.

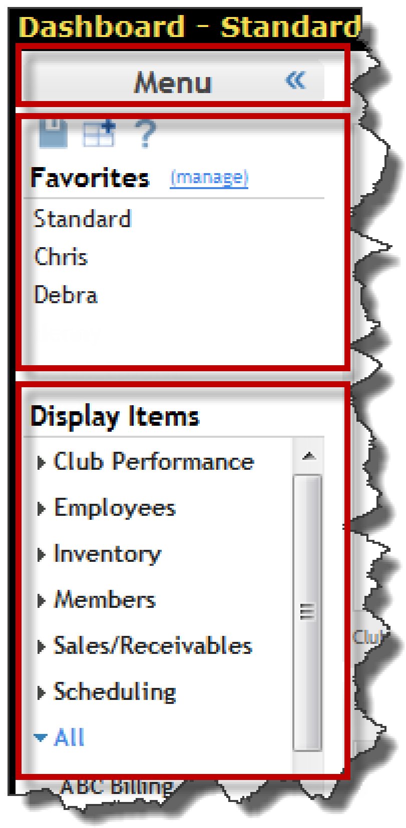
Using the Sidebar Menu

Use the Sidebar menu to select among Dashboard favorites, manipulate favorites, and add items to favorites.

You can hide the Sidebar Menu to make more space available for Dashboard items.

Menu Sections

The Sidebar menu is divided into three sections. The following image shows an example of the Sidebar menu with its three sections highlighted:



The three sections of the menu are

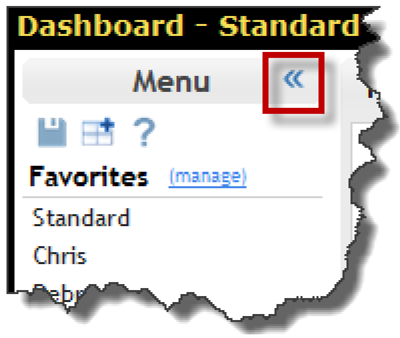
- The Show/Hide buttons
- The Favorites Section
- The Display Items Section

Hiding the Sidebar Menu

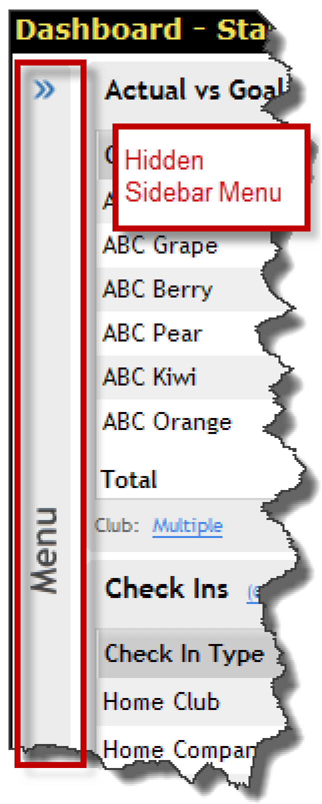
To make more room on the Dashboard, you may choose to hide the Sidebar menu.

To hide the Sidebar menu:

- Click the Hide button in the upper right area of the menu.



DataTrak hides the Sidebar menu.

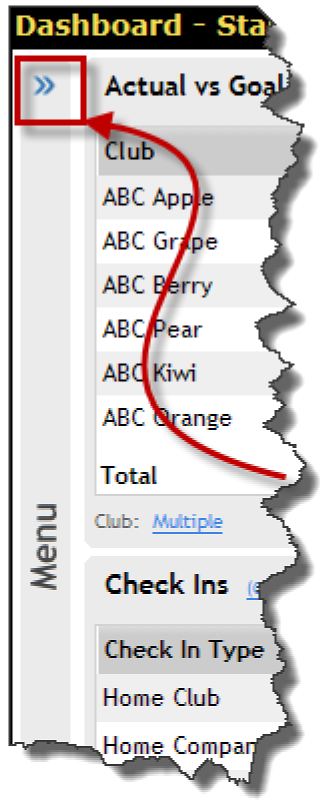


Showing the Sidebar Menu

Show the Sidebar menu when you want to work with Displays, for example, by adding items or saving the settings on the Favorite you're currently viewing. For more information, see Configuring Items.

To show the Sidebar menu:

- Click the Show button at the top of the hidden menu.



DataTrak shows the full sidebar menu.

Working with Item Categories

Dashboard groups display items in categories, based on the information they provide.

For more information about the data in Dashboard items, see Available Display Items.

To make it easy to find items in Dashboard, you can show and hide the contents of categories, and even preview a Display Item before using it.

Showing and Hiding Item Categories

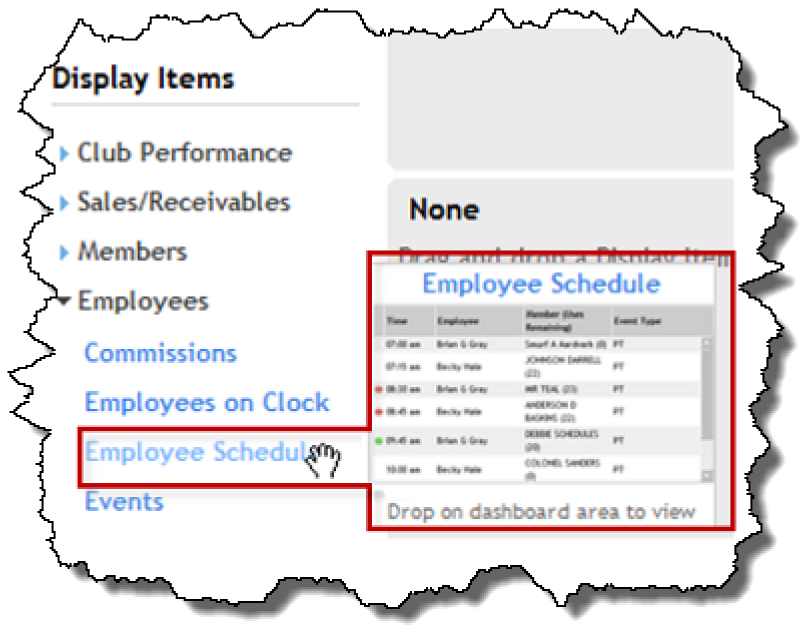
Click the category name to show, or *expand*, its contents. The following image shows an example of the menu with an expanded Sales/Receivables category.

Expanded categories have the following characteristics:

- Dashboard expands only one category at a time.
- Items in a category have their names displayed in blue.
- Expanded categories show a downward-pointing triangle to the left of the category name.

Previewing a Display Item

Move your mouse over the name of an item in the Sidebar Menu to see a small preview of the item.

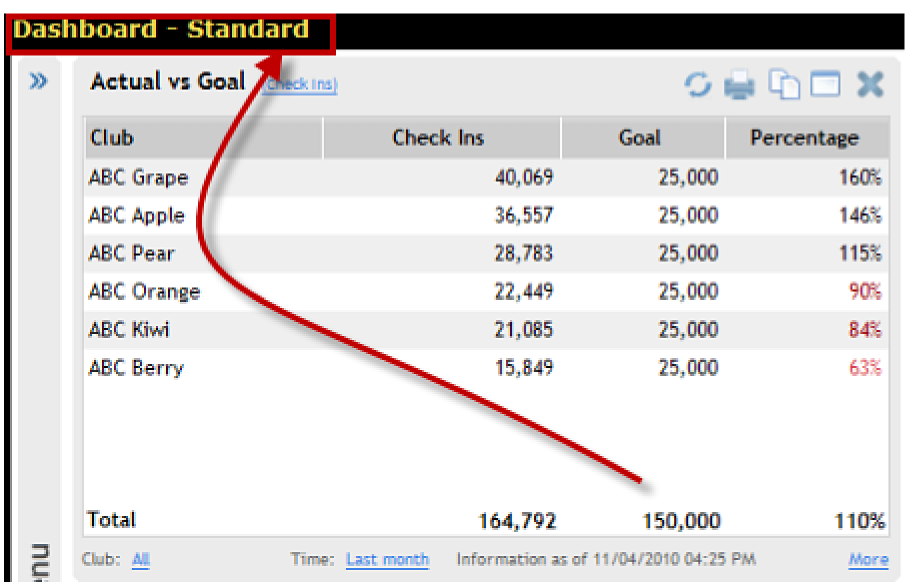


Understanding A Display Item's Contents

Dashboard displays a broad variety of information and measurements. However, every Display Item uses similar conventions.

Identifying the Current Dashboard Favorite

The name of the current favorite appears in the upper-left corner of the Dashboard page.



Identifying the Data on a Display Item

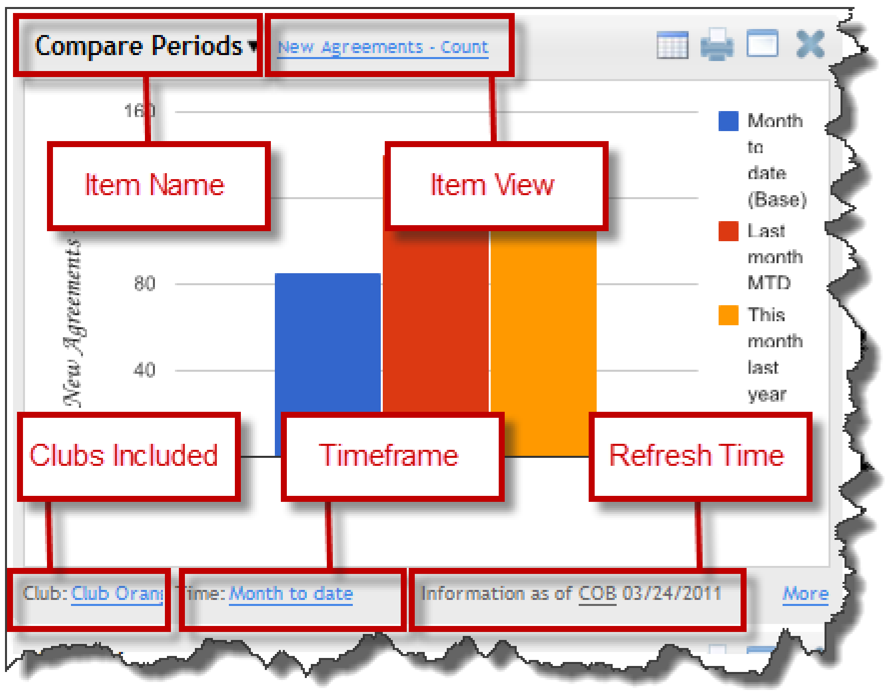
Display Items are very versatile, and one item that you drag onto a display can show a large variety of data using a large selection of parameters.

Note: For more information about the information and measurements you can track in Dashboard, see **Available Display Items and Data**.

Fortunately, the Dashboard provides plenty of cues for you to see what's displayed on any individual item.

Viewing Item Parameters at a Glance

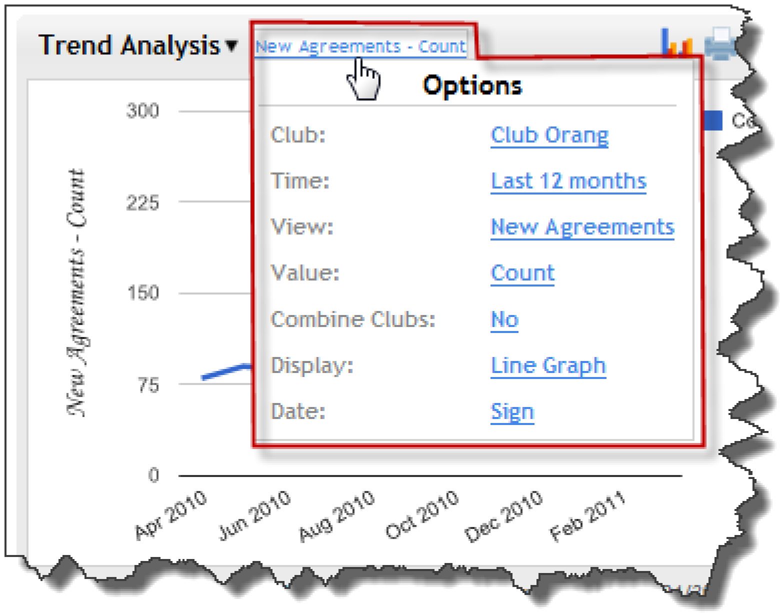
Five key pieces of information for a Display Item's parameters are shown. The following image shows an example of each of these pieces of information on a display item.



- **Item Name**: The item name
- **Item View**: The item view
- **Clubs Included**: The club or clubs displayed
- **Timeframe**: The time period selected in the item configuration
- **Refresh Time**: The last time the information was refreshed

Seeing All Parameters in a List

If you would prefer to see all the settings for a specific display item in a list, move your mouse arrow over the underlined label for the Item View. DataTrak displays a box listing all of the parameters.

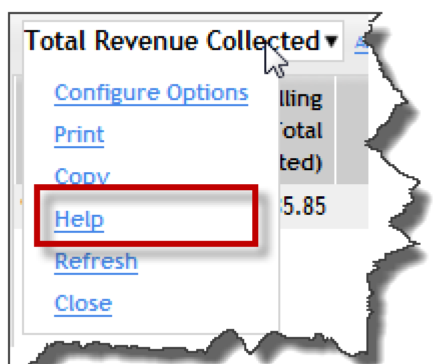


Getting Help with Display Items

Each Display Item on the Dashboard contains a link to Help for that item.

To see help for a Display item:

1. Move the mouse over the Display Item's title to show the Configuration Menu.



2. Click **Help**.

You can also view specific configuration options for every Dashboard item in the Help section, Available Display Items and Data.

Configuring Items

Although different Dashboard Items have different configuration options and display different information, the process of configuring them is the same from item to item.

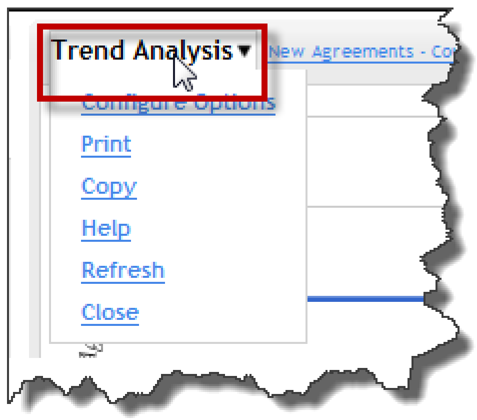
For more information the specific configuration options for each Dashboard item, see Available Display Items and Data.

Using Item Drop-Down Configuration Menus

Every item currently displayed on a Favorite has a drop-down menu containing several options.

To access an item's configuration Menu:

- Move your mouse over the item's title.



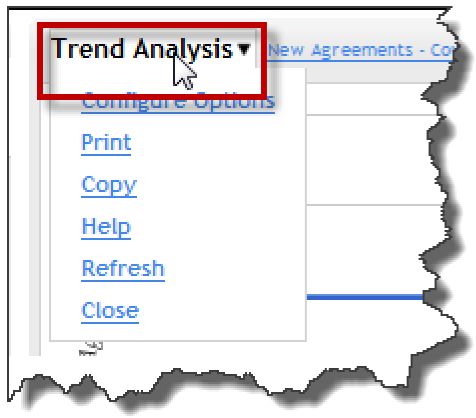
Selecting Clubs, Views, and Filters

Individual display items have different configuration options for selecting clubs, views, and filters. For more information the specific configuration options for each Dashboard item, see Available Display Items and Data.

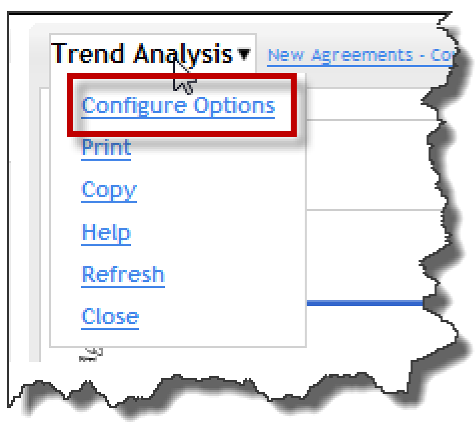
You can use either the item's configuration Menu or any of several links on the item to access its options.

To edit item configuration options:

- Use the Configuration Menu
  1. Move the mouse over the item title to display the configuration Menu.

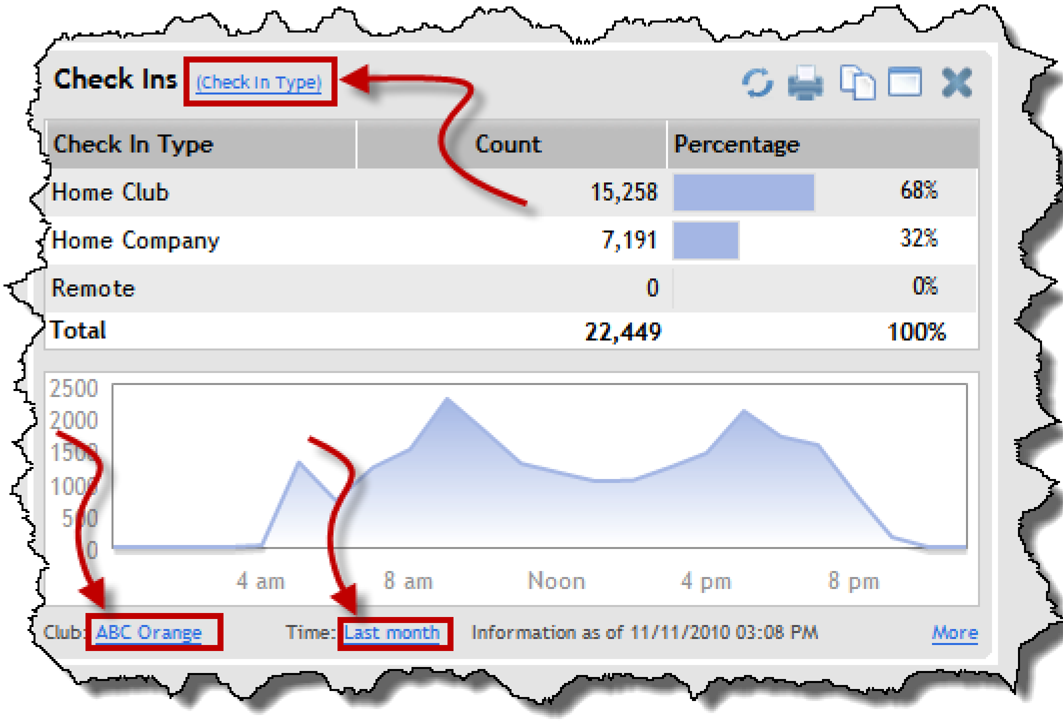


  2. Click **Configure Options**.

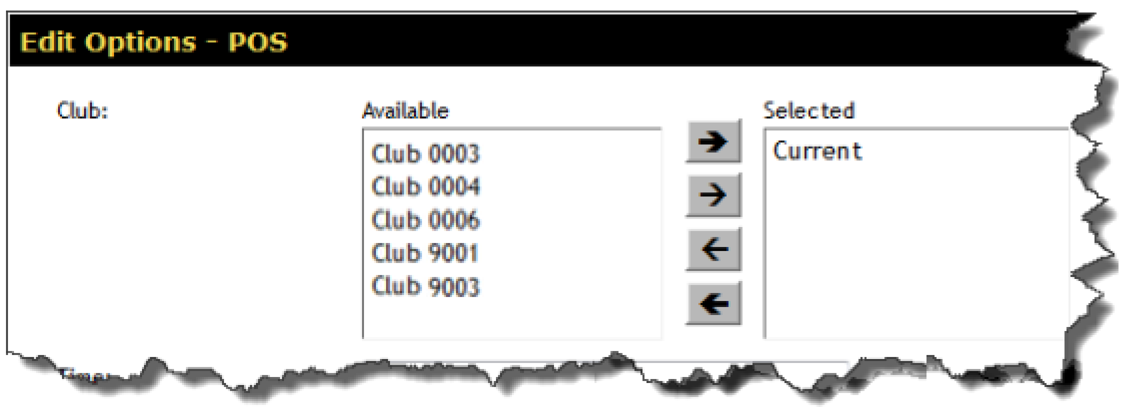


- Click any of the following links on a display item to edit its configuration options:
  - Item View
  - Clubs Displayed

- Timeframe



The Edit Options dialog for the item opens.



Refreshing Data

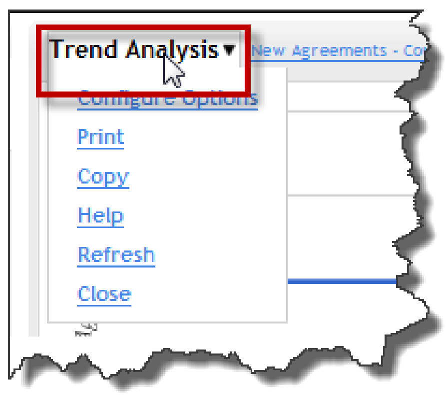
You can refresh the data for a single Display Item or for all items at one time. *Refreshing* means updating the item to use the most current data. See Available Display Items and Data for more information about the different Display Items Dashboard offers.

Dashboard always shows the most recent refresh date and time for an item at the bottom of the item. For more information, see Understanding A Display Item's Contents.

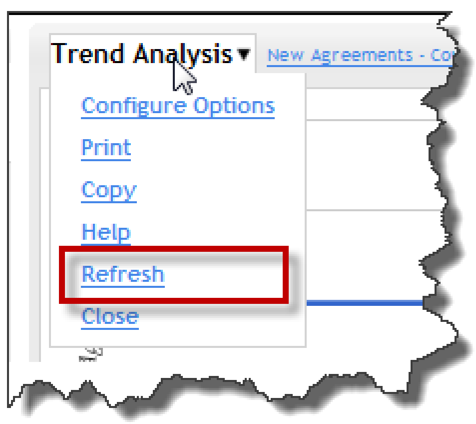
Note: An item always refreshes when you add it to the Display, or when you click the link for the Display in the Sidebar menu.

To refresh the data for a single item:

1. Move the mouse over the Display Item's title to show the Configuration Menu.

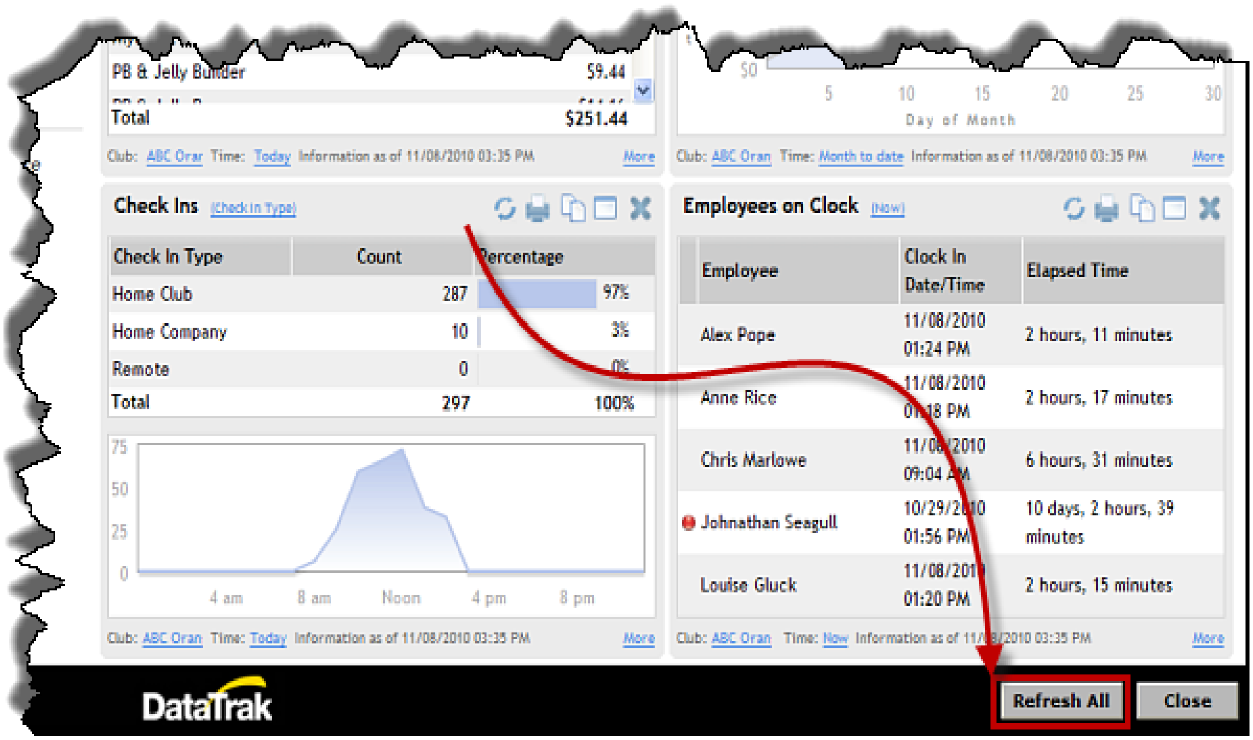


- Click **Refresh.**



To refresh the data for all items on the Display:

- Click the **Refresh All** button at the bottom of the DataTrak screen.



Using Drill-down Links

Drill-down links give additional information about a category of information. Drill-down links are available for the POS Sales item and for the Tiered Commissions item. Dashboard underlines drill-down links.

POS Drill-Down Links

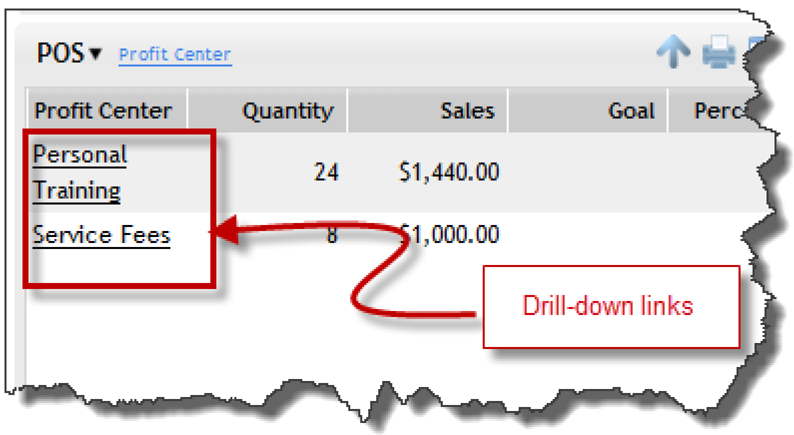
POS Sales drill-down links go in the order of most general to most specific:

- Profit Center Group
- Profit Center
- Items

Tiered Commissions Drill-Down Links

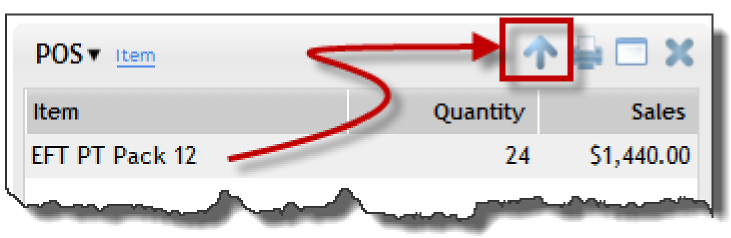
To drill down for more information:

- Click the underlined link.



To navigate to a more general category:

- Click the **Up Level** icon.

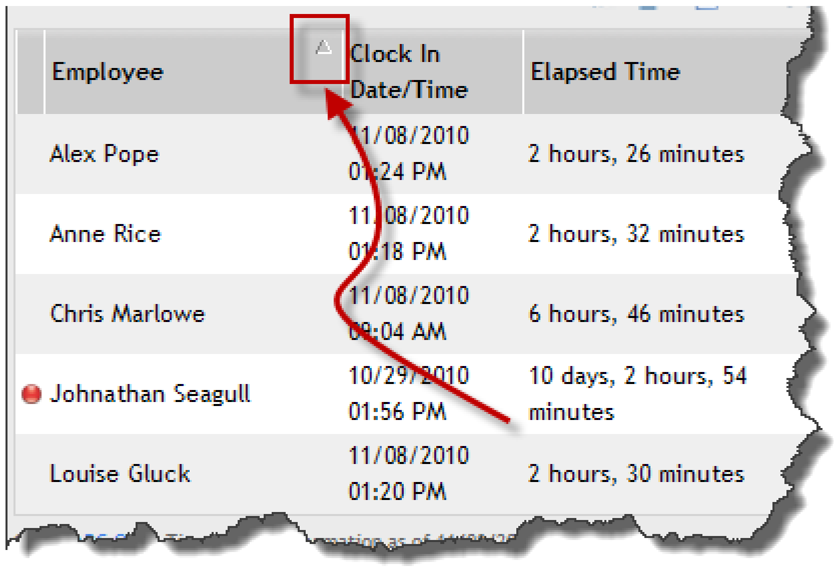


Sorting Item Data

To sort item data:

1. Click a column heading to sort the information in the item in ascending order.
2. Click the column heading a second time to sort the information in descending order.

   DataTrak shows an arrow in the column heading to indicate the sort order.



Working with Goals

The Dashboard offers the opportunity to set goals for the following items:

- abc Billing (Total Collected)
- Check Ins
- New Agreements
- New Prospects
- POS Sales

You define Dashboard goals on a monthly basis. On reports, the Dashboard divides the monthly goal by the number of days in the displayed month to determine the goal for each day of the month.

For timeframes less than a month, Dashboard multiples the daily goal by the number of days in the timeframe.

Note 1: Daily goal lines will not appear on graphs if the goal value is a number smaller than the number of days in the month.

Note 2: Dashboard also includes a special item called Actual vs Goal, providing another way to see how a club or groups of clubs' performance deviates from your goals. For more information about the Actual vs Goal item, see Actual vs Goal.

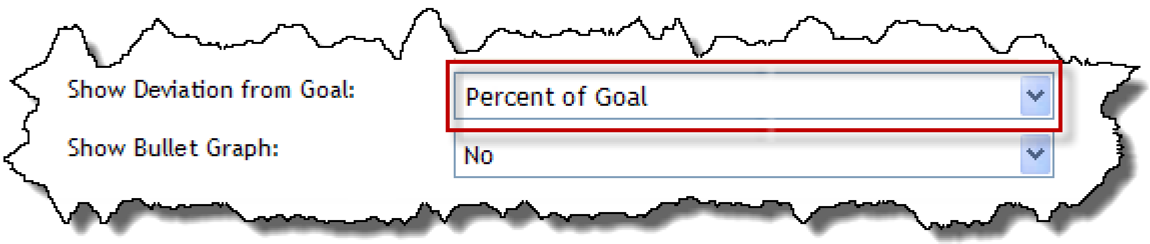
Interpreting Goals

Depending on your configuration choices for an item, you can evaluate performance relative to goals in the following ways:

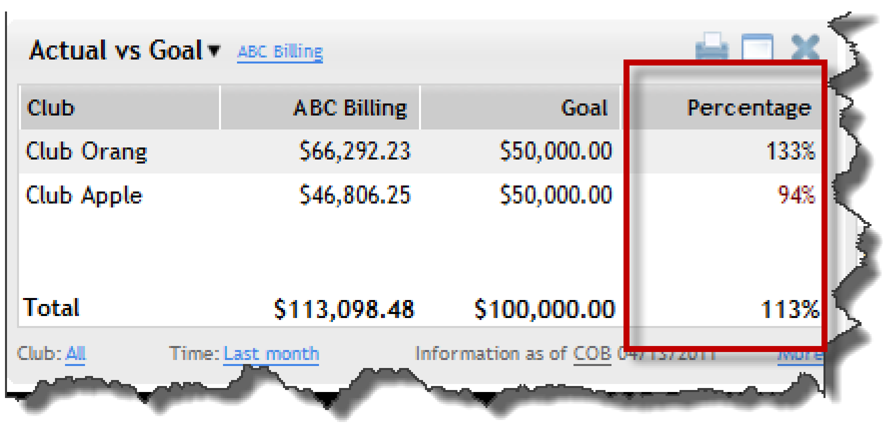
- Displaying a percentage of performance relative to the goal
- Displaying the variance from the goal
- Interpreting a bullet graph
- Interpreting a line graph

Percentage Values

Many Dashboard items offer the option to show how close you are to meeting a goal by displaying your performance relative to the goal as a percentage value.

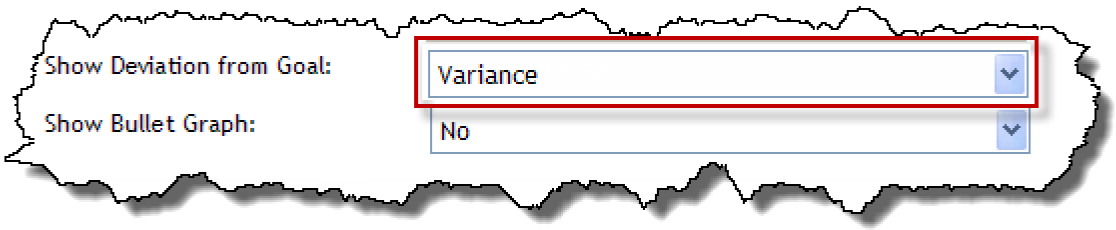


Dashboard displays the percentage on the Dashboard item.

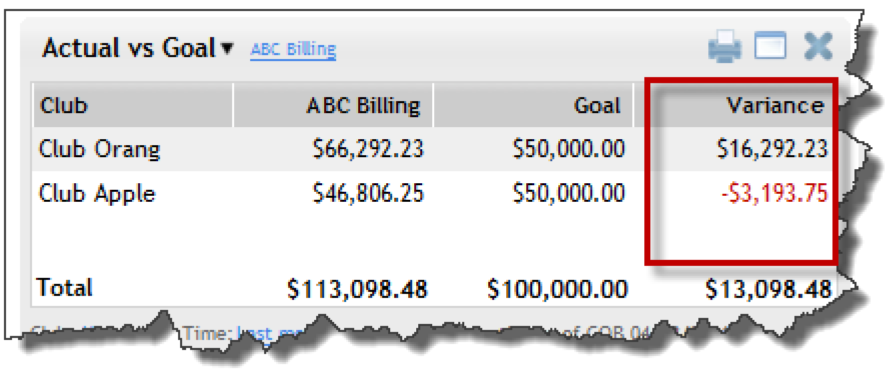


Variance Values

Many Dashboard items offer the option to show how close you are to meeting a goal by displaying the *variance*, that is, the difference between your current performance and the goal.



Dashboard displays this value on specific Dashboard items.

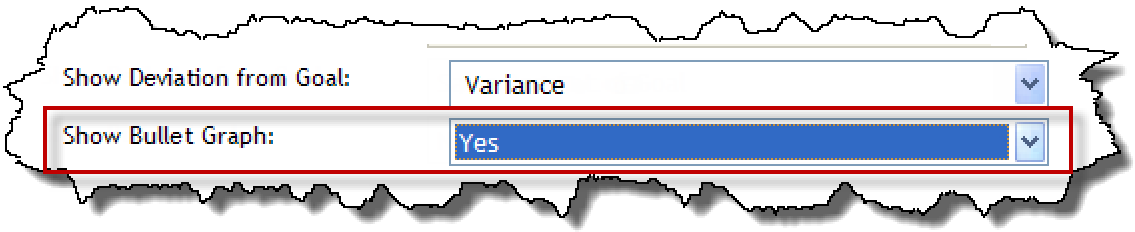


Club	ABC Billing	Goal	Variance
Club Orang	$66,292.23	$50,000.00	$16,292.23
Club Apple	$46,806.25	$50,000.00	-$3,193.75
Total	$113,098.48	$100,000.00	$13,098.48

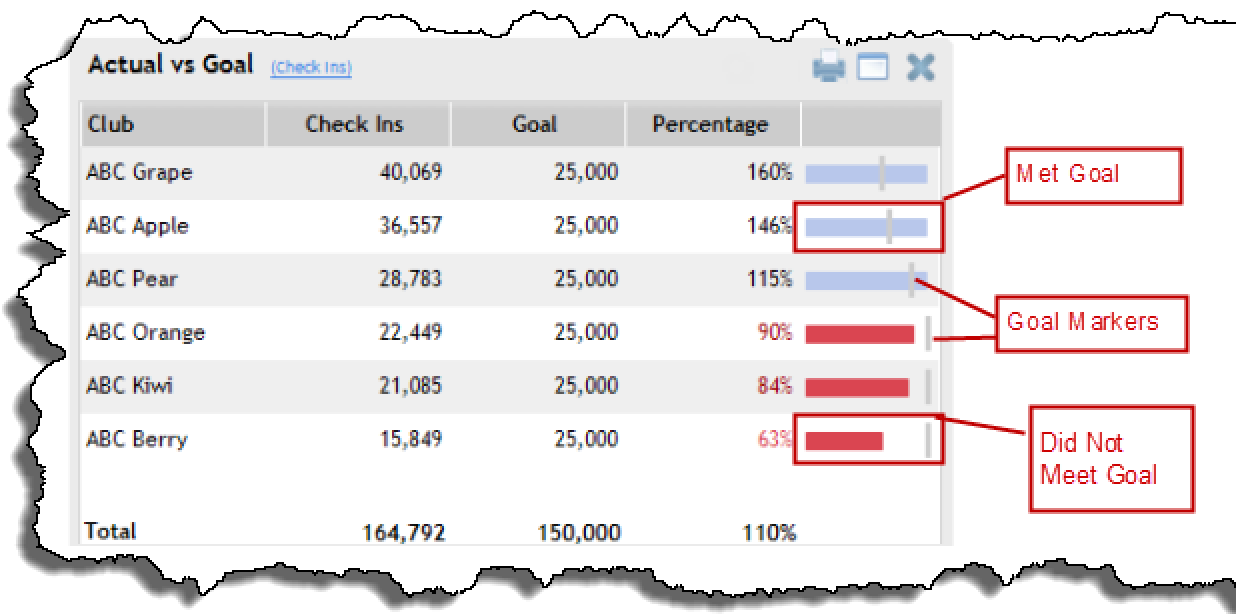
Bullet Graphs

Bullet graphs provide a fast, intuitive way to compare performance to a goal. Each horizontal line shows the actual performance, and the vertical line, or *goal marker* represents the goal.

You can set bullet graphs to display on select Dashboard items.



Use bullet graphs to determine whether a goal has been met. If the bar is blue and meets or crosses the goal marker then that goal has been met or surpassed. Of course, a red bar means the item has not met its goal and a blue bar means it has.

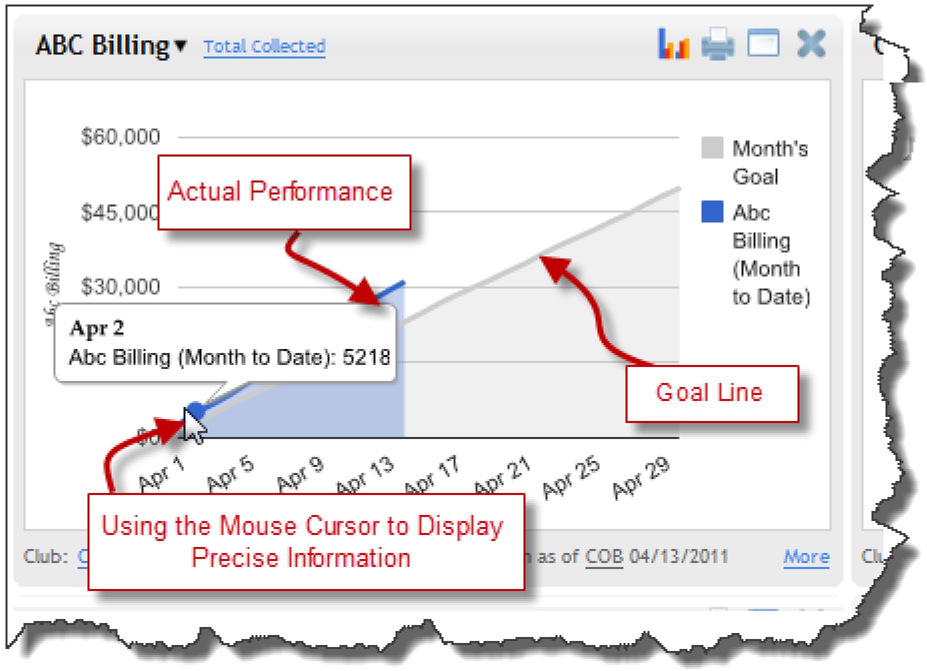


Club	Check Ins	Goal	Percentage
ABC Grape	40,069	25,000	160%
ABC Apple	36,557	25,000	146%
ABC Pear	28,783	25,000	115%
ABC Orange	22,449	25,000	90%
ABC Kiwi	21,085	25,000	84%
ABC Berry	15,849	25,000	63%
Total	164,792	150,000	110%

Line Graphs

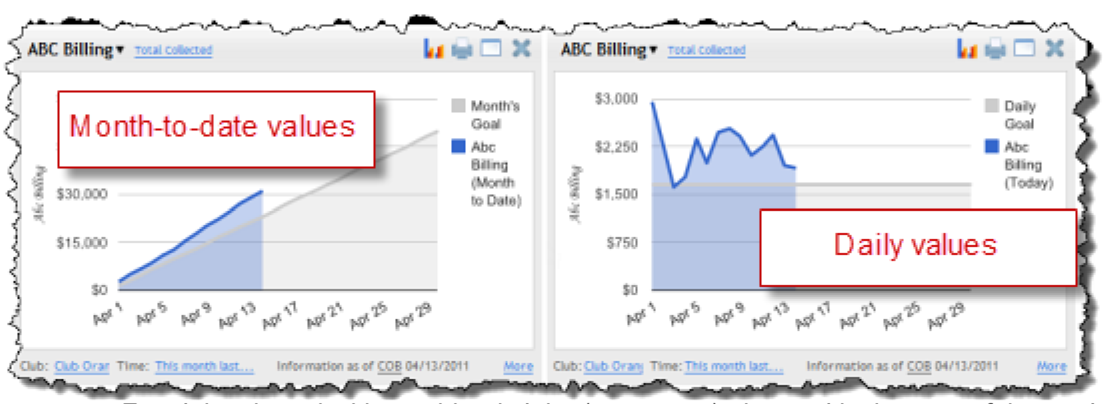
On line graphs, Dashboard shows a bolder, blue line to represent actual performance and a fainter, gray line to represent the goal. Move your mouse over the graph to see precise information for a data point.

The following image shows an example of a graph where the club is exceeding its goal:



Understanding Daily Goals

On Display Items, the Dashboard divides the monthly goal by the number of days in the displayed month and uses that to set goals for each day of the month.



For clubs viewed with combined clubs (aggregate), the goal is the sum of the goals for all the clubs.

Setting Goals

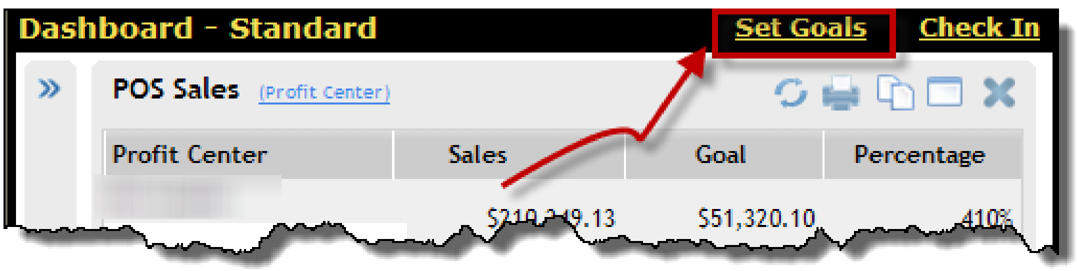
You define goals for items on a monthly basis. For POS, you can also define goals for specific Profit Centers and clubs.

Note: Refresh the data on a display to see new goal settings reflected. For more information, see Refreshing Data.

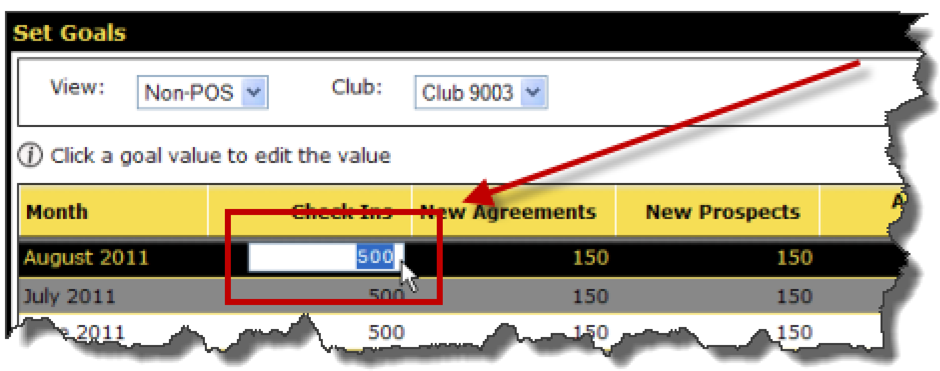
Setting non-POS Goals

To set a non-POS goal:

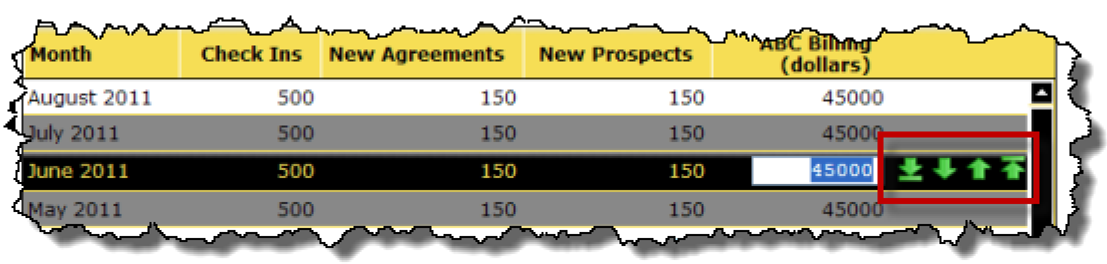
1. Click **Set Goals** in the upper-right corner of the Dashboard.



2. Click an individual goal to edit it.



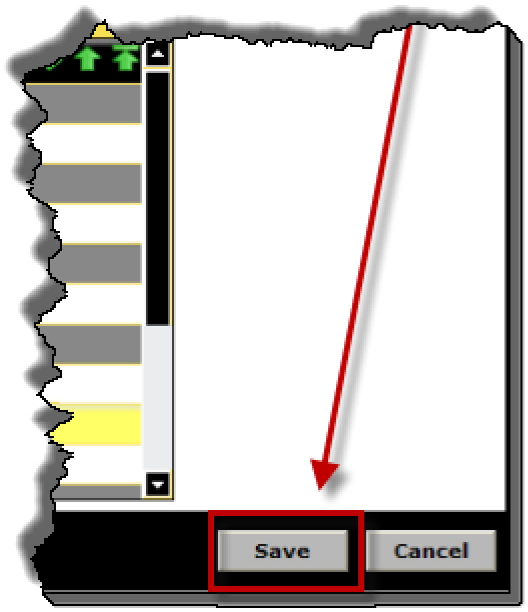
3. Press the **Tab** key to move from left to right on the row.
4. To apply the changes for a month's row of goals to one or more additional months in the list, use the green arrows on the right side of the row.



- o Copy goals from the current row to all rows below.
- o Copy goals from the current row to the row immediately below.

- o Copy goals from the current row to the row immediately above.
- o Copy goals from the current row to all rows above.

5. Click the **Save** button.



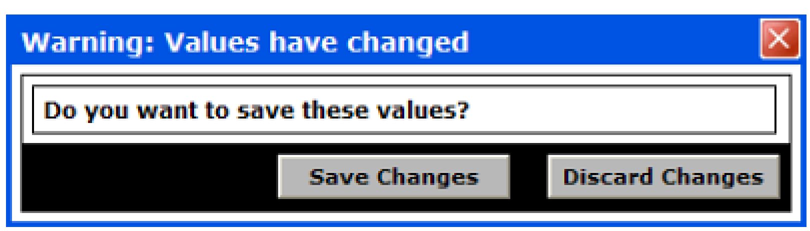
Setting POS Goals

You set monthly POS goals for each Profit Center.

DataTrak combines the Profit Center goals to determine the goals for Profit Center Groups and the overall goal for the POS item. DataTrak calculates Daily goals by dividing the monthly goals by the number of days in the month.

To save a goal and continue setting additional goals:

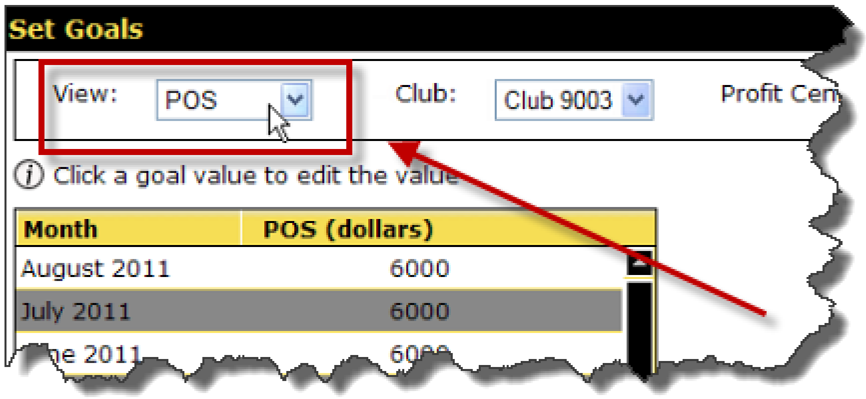
1. Select a different View, Profit Center, or Goal from the list.
2. Click **Save Changes** when DataTrak warns you values have changed.



To set a POS goal:

1. Click **Set Goals** in the upper-right corner of the Dashboard.
2. Click the **View** list.

3. Select **POS** from the View list.



4. Click the Profit Center list to show a list of Profit Centers.
5. Select a Profit Center from the list.
6. Click an individual goal to edit it.
7. Press the **Tab** key to move from left to right on the row.
8. Click the **Save** button.

Note: Whether you are setting POS goals for profit centers or setting any other goal, save time by copying the goal for one month to other months or groups of months. See setting non-POS goals for more information.

Copying Goals to Additional Clubs

To save time, you can copy all of one club's goals for all items for one year to another year and/or to another club or group of clubs.

When copying goals, you have a Goal Source and Goal Destinations.

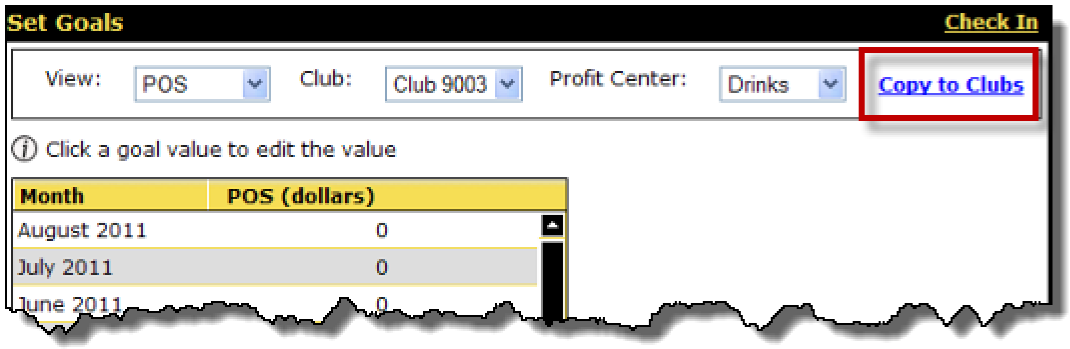
- The *Goal Source* is the club you are copying goal settings from. Goals comprise all of the goals for all of the items for a year's worth of months for one club.
- *Goal Destinations* are the club or clubs you are copying the goals to. All existing goals are overwritten by the source goals. Goals comprise all of the goals for all of the items for a year's worth of months for one more clubs.

Even if you have only one club, you may use Copy to Clubs as a convenient way to copy all goals for all items from one year to the next.

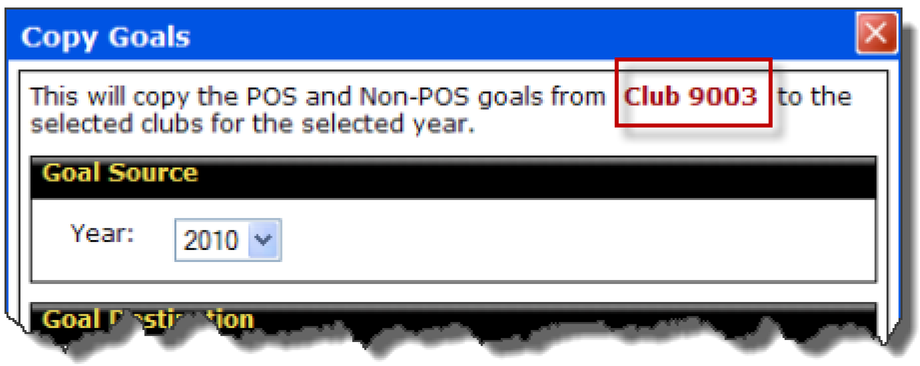
To copy goals to another club or clubs:

1. If necessary, click **Set Goals** in the upper-right corner of the Dashboard.
2. Select the Club you will use as the source for the copy from the Clubs list.

3. Click **Copy to Clubs**, in the upper-right corner of the Dashboard.



4. Confirm that the Copy Goals dialog box shows the appropriate source club.



5. Select the Goal Source Year.
6. Select the Goal Destination Year.
7. Select the Destination Clubs from the Available list on the left.
8. Use the left or right arrows to move clubs to the Selected clubs list on the right.
9. Click **OK**.

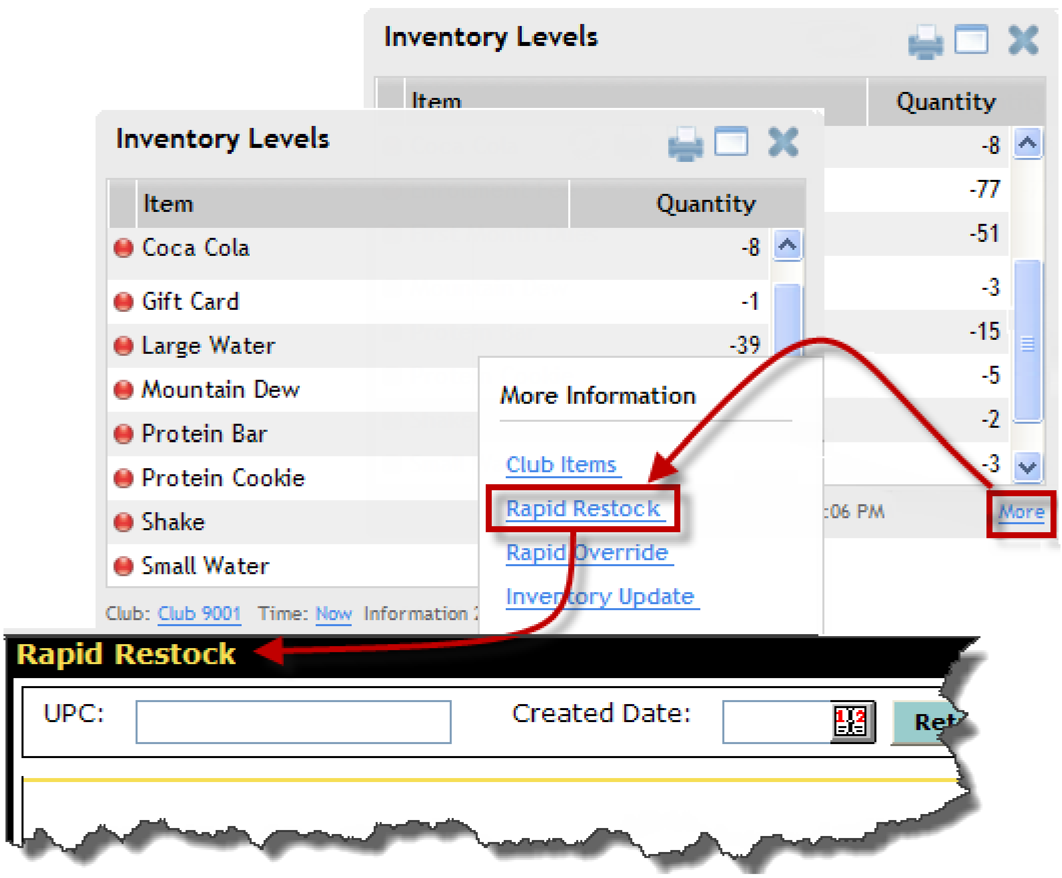
Using Dashboard Data

The DataTrak Dashboard is more than just a place to get a quick view of the health of your business. It's a great starting point for...

- Exploring your data more deeply
- Making information accessible to other people or programs

Acting on Information with More Links

Dashboard makes it convenient to act on the information you see on a Dashboard item. Each item includes a More link. Clicking **More** opens a menu of links that have been designed specifically for that item.



Printing Dashboard Items

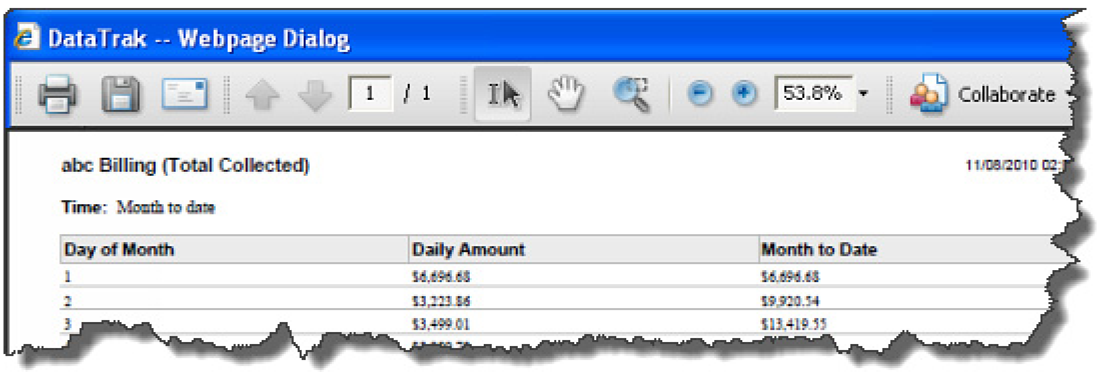
You can print the data for any Dashboard item directly from the Dashboard.

Note: Don't forget that Dashboard makes it easy to investigate your club performance through More links at the bottom right of each Dashboard Item on the Display. For more information, see Acting on Information with More Links.

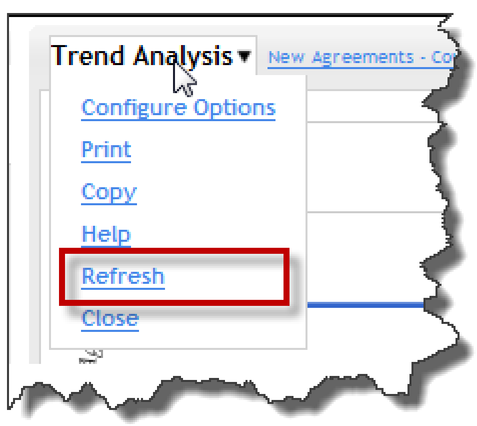
To print data from a Dashboard Item:

1. Click the **Print** button for that item.

2. Dashboard opens a PDF containing the data for the item in a new window.



Note: You can also use the **Print** command in the item's configuration Menu.

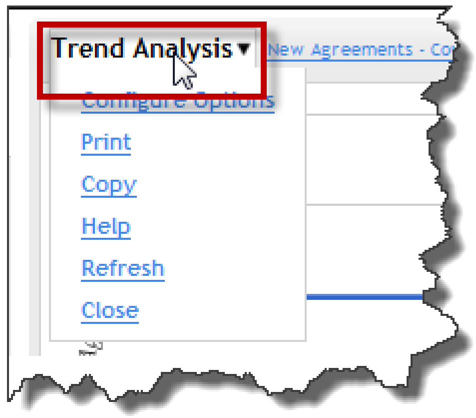


Copying Display Item Data

You can copy the values from a Dashboard item to paste them in another application. For example, you may wish to copy the data for a Display Item into a spreadsheet.

To copy Display Item data:

1. Move the mouse over the item title to display the configuration Menu.



2. Click **Copy**.
3. If Internet Explorer shows a warning, click **Allow Access**.
4. Switch to the second application, and paste the data.

Available Display Items and Data

Dashboard shows metrics, measurements, and information to you in Display Items, and shows up to four items at a time.

Items fall into one or more of the five following categories:

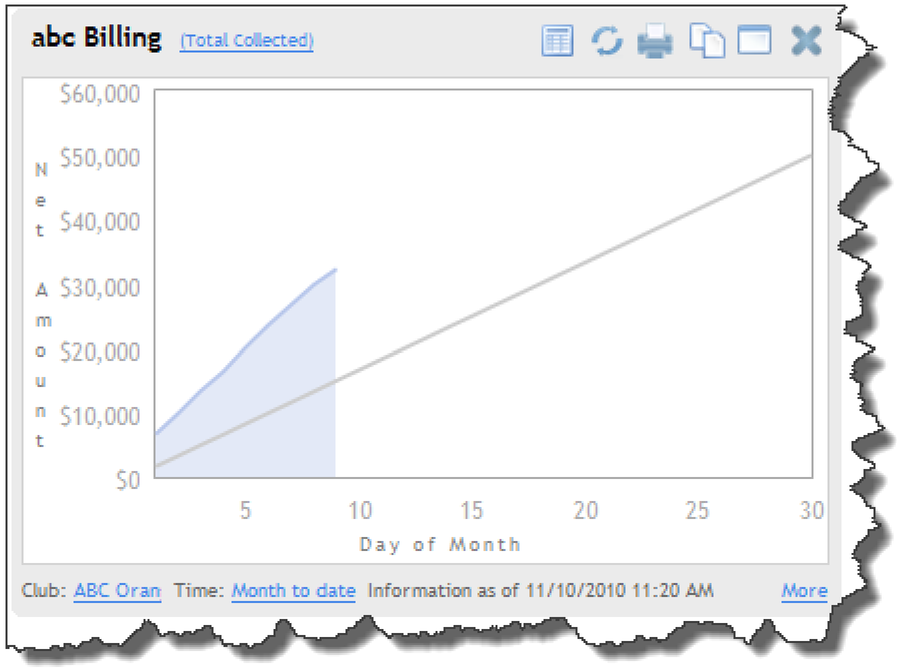
- Club Performance
- Sales/Receivables
- Members
- Employees
- Inventory
- All

Dashboard Items on the Sidebar menu are hidden in categories until you expand the category in the Sidebar menu. For more information on collapsing and expanding categories of items, see Using the Sidebar Menu.

You can get more information about any item by clicking its help link. For more information about Help links, see Getting Help with Display Items.

abc Billing

The abc Billing item shows ABC Financial billing Total Collected data. The following image shows an example of the abc Billing item for a single club with a Month to date timeframe.



See Using ABC Billing with CRS Reports for more information about the data included in ABC Billing Total Collected.

The following table shows the filters and settings available for the abc Billing item.

abc Billing Item Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Timeframes	Yesterday This week Last week Month to date Last month Last month MTD This month last year This month last year MTD
Displays	Line Graph Bar Graph Table
Goals Data	Displays in light gray to compare to actual data
Show Data	Daily values Month-to-date values

abc Billing Item Options

More Links	Set Goals (Dashboard Set Goals page)

Note: For another view of this activity, see either the Payment Activity Report in CRS or the Billing Statement, Total Collected.

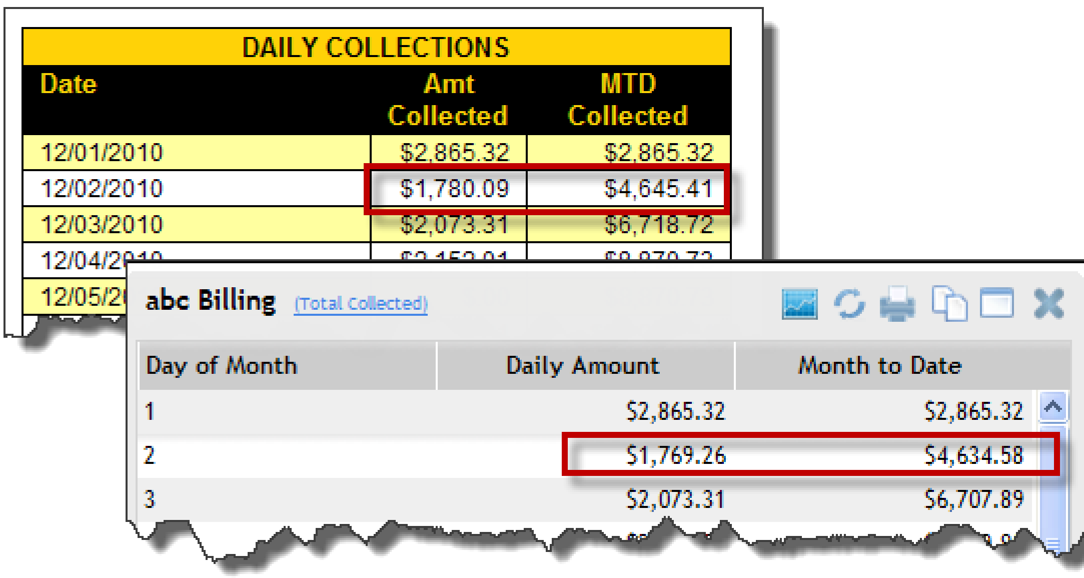
Using ABC Billing with CRS Reports

CRS Daily Billing Statement

MTD Collected Totals

CRS MTD Collected Totals on the Daily Billing Statement **do not** include reversals of payments made at club.

Dashboard ABC Billing Total Collected amount **do** include reversals of payments made at club.



Weekend Data

On Mondays, the ABC Billing item in the Dashboard reflects all payments on Sunday and Monday. On Mondays, the CRS Daily Billing Statement reflects only Payments Made at Club for Sundays.

Tip: ABC Billing Dashboard data is consistent with the CRS Payment Activity Report.

Actual vs Goal Item

The Actual vs Goal item offers a way of evaluating performance relative to the goals you've set and for comparing clubs to one another.

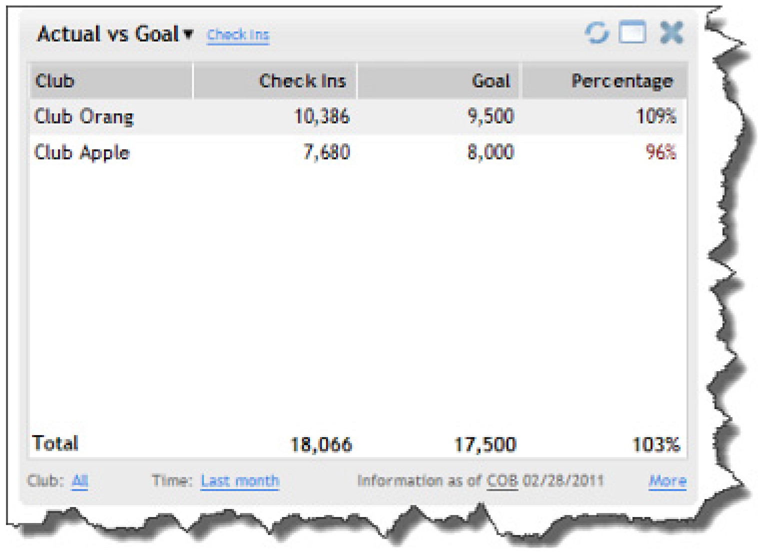
For more information about Goals, see Working with Goals.

You can display any of the following information on an Actual vs Goal Item:

- POS Sales
- ABC Billing

- Check Ins
- New Prospects
- New Agreements

The following image shows an example of the Actual vs Goal Item showing ABC Billing Data for multiple clubs.

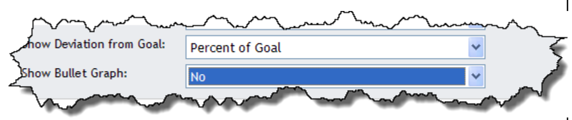


The following table shows the filters and settings available for the Actual vs Goal item.

Actual vs Goal Item Options

Sidebar menu Category	Club Performance
Club Selection	Multiple
Timeframes	Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Views	POS Sales ABC Billing Check Ins New Prospects New Agreements
POS Filters	Profit Center Group selection Profit Center selection

Actual vs Goal Item Options

Goals Data	Available for all views Displayed as either a numeric or percentage variance Optional bullet graph. 
More Links	Agreements (Members> Agreements) Check-In Display (Check In>Attended) Manage Members (Members>Manage) Reports (Reports>Manage Reports) Sales Commissions (Setup>Sales Commissions page) Set Goals (Dashboard Set Goals page)

Note: When viewing POS information at the item level, you can only select one club at a time.

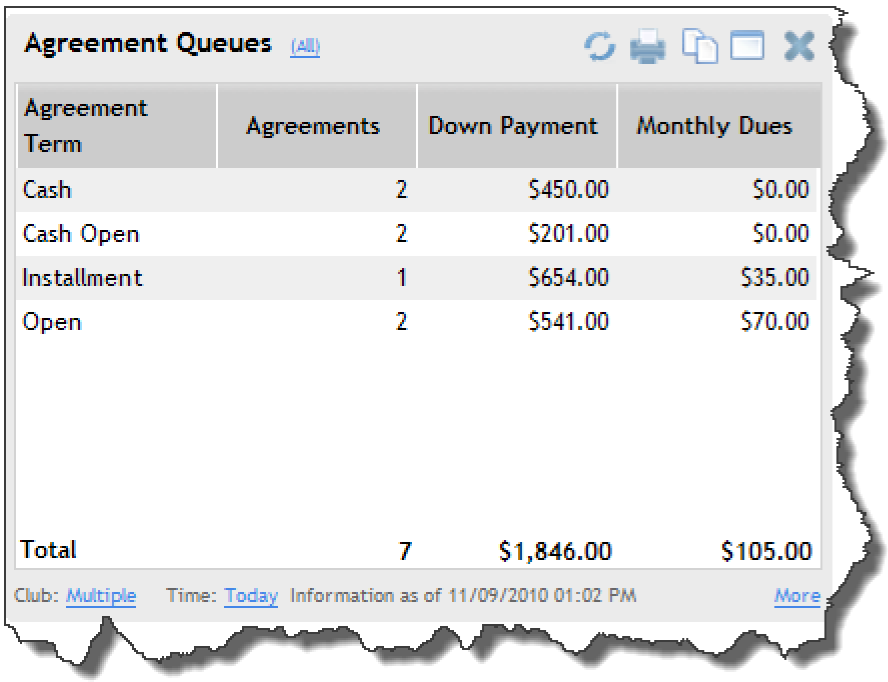
Agreement Queues

The Agreement Queues item shows Agreements that fit the following criteria:

- Entered via DataTrak EAE
- For the timeframe specified
- For the filters and settings specified

Note: The timeframe filter uses the day the agreement was signed.

The following image shows an example of the Agreement Queues item using the Agreement Term view.



Agreement Term	Agreements	Down Payment	Monthly Dues
Cash	2	$450.00	$0.00
Cash Open	2	$201.00	$0.00
Installment	1	$654.00	$35.00
Open	2	$541.00	$70.00
Total	7	$1,846.00	$105.00

The following table shows the filters and settings available for the Agreement Queues item.

Agreement Queues Item Options

Sidebar menu Category	Sales/Receivables Members
Club Selection	Multiple

Agreement Queues Item Options

Timeframes	*** Timeframes in the Agreement Queues item use the signed date** All Today Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Views	Employee Payment Plan Agreement Term Agreement Type Payment Type
Queue Filters	All Approval CC Name Hold Minor POS Posted Posted - Conversion Pre-Approval Reject (Any addition queues you have defined)
More Links	Agreements (Members>Agreements)

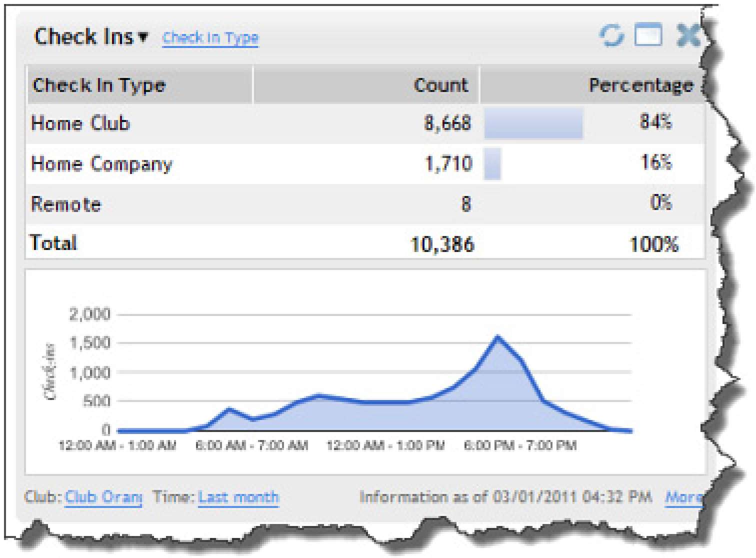
Check Ins

The Check Ins item shows member Check Ins for a specified timeframe and view. The top section shows check ins categorized by one of the following:

- Check In Type
- Alert
- Membership Type

The check ins by hour graph uses either the check ins for an individual day *or* average hourly check ins for the selected timeframe.

The following image shows an example of the Check Ins item, set to display check ins by type.



The following table shows the filters and settings available for the Check Ins item.

Check Ins Item Options

Sidebar menu Category	Members
Club Selection	Single
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Views	Check In Type Alert Membership Type
More Links	Check-In Display

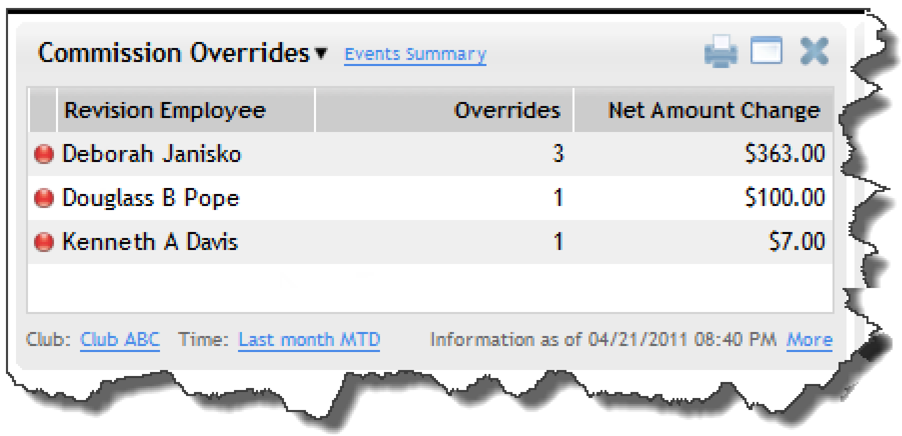
Commission Overrides

The Commission Override item shows when a DataTrak user decided not to use the default commissions for Point of Sale or Events, and used the override function.

Commission overrides offers two modes, Detail and Summary.

- **Detail** shows a line for each time there was an override, including the employee, date, time, and the dollar amount of the change to the commission.
- **Summary** shows a line for each employee, with the total dollar amount of the commission changes and the number of times they used the override function.

The following image shows an example of the Commission Overrides viewed in Summary mode.



The following table shows the filters and options for the Commission Overrides item.

Commission Overrides Options

Side bar menu Category	Sales/Receivables
Club Selection	Single
Timeframes	Today This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Views	Sales Events
Modes	Detail Summary

Commissions

The Commissions item shows employee commissions for either Scheduling sales or POS sales.

The following image shows an example of the Commissions item for POS Sales.

The following table shows the filters and settings available for the Commissions item.

Commissions Item Options

Sidebar menu Category	Employees
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Views	Scheduling POS Sales
Employee Filters	All Employees By Department By Individual Employee (must select Department First)
More Links	Sales Commissions (Setup>Employee>Sales Commissions)

Compare Periods

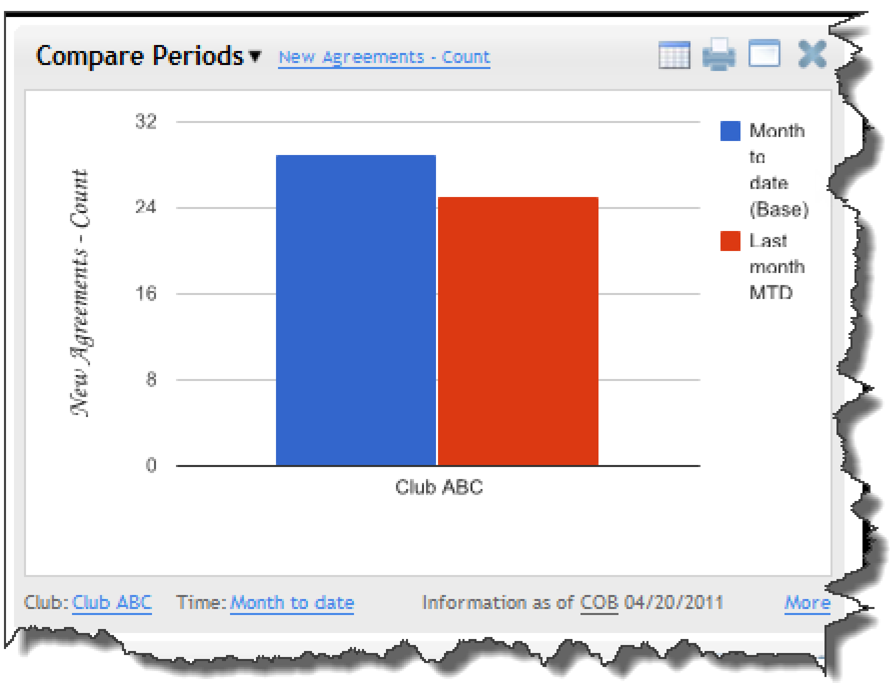
The Compare Periods item shows a graph or a table comparing performance for up to three time periods, using New Agreements, POS, Cancellations, or Check Ins data.

You start by selecting a Base Period (Time Period 1), and then one or two additional time periods to compare to it.

When you use Compare Periods for New Agreements data, you also choose which date on the Agreement is used in compiling the data. Choose among the following dates:

- Sign
- Begin
- First Due Date
- Posted
- Queue

The following image shows an example of a the Compare Periods item comparing the number of Agreements for the current month-to-date with the same data for the same day in the previous month.



The following table shows the filters and settings available for the Compare Periods item.

Compare Periods Options

Sidebar menu Category	Club Performance
Club Selection	Multiple

Compare Periods Options

Timeframes	Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD 7 day average 15 day average 30 day average None
Timeframe Comparison	Select 2-3 Time Periods to compare
Views	New Agreements POS Cancellations Check Ins ABC Billing
Displayed Value	Count Sale Price Down Payment Monthly Invoice Due Enhancement Fee Remaining Balance
Combine Clubs	Yes (see the data from multiple clubs in aggregate) No (compare the clubs to one another)
Display	Bar Graph Table
Date used in timeframe for New Agreements	Sign Begin First Due Date Posted Queue
More Links	Agreements Manage Members Reports

Electronic Agreements

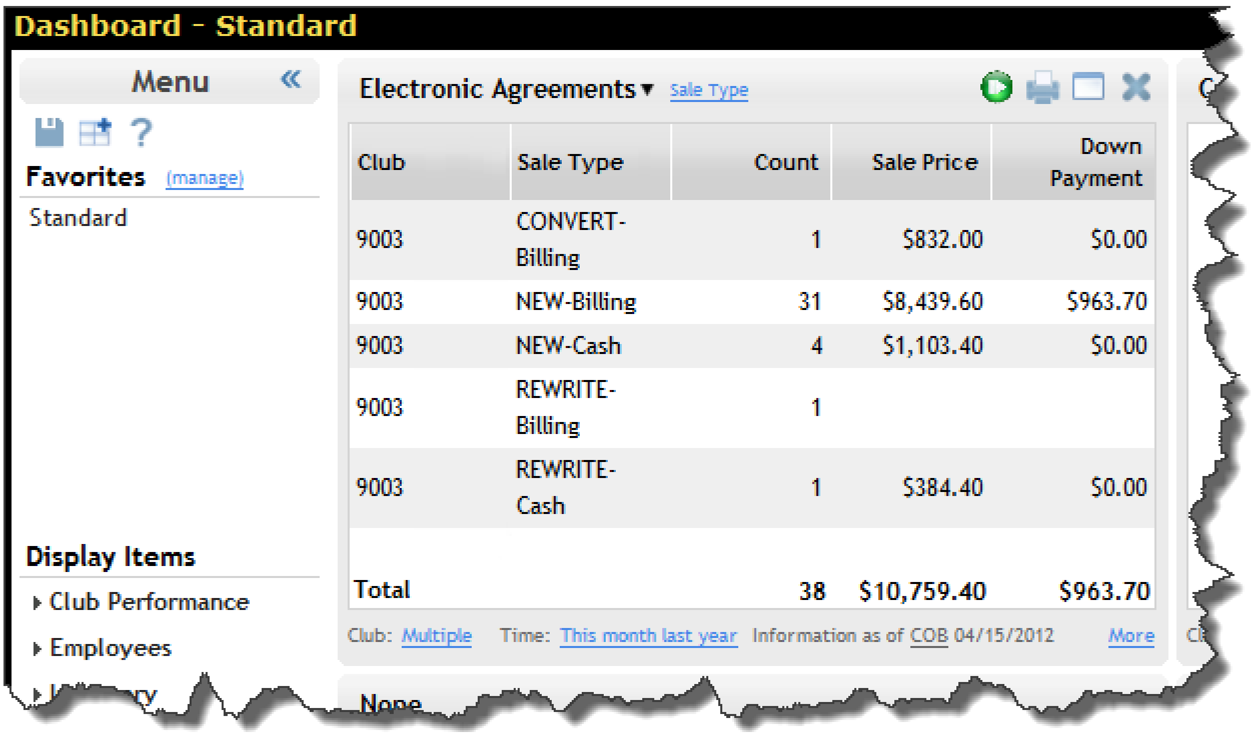
The Electronic Agreements item shows a list of new agreements for a selected time period for one or more clubs. You can configure and save the columns included in the display item, to best suit your business processes.

You also use the Electronic Agreements Item to launch the Daily Membership Sales Report.

When you use the Electronic Agreements, you also choose which date on the Agreement is used in compiling the data. Choose among the following dates:

- Sign
- Begin
- First Due Date
- Posted
- Queue

The following image shows an example of Agreements, viewed by Sale Type, for a single club.



The following table shows the filters and settings available for the Electronic Agreements item.

Electronic Agreements Options

Sidebar menu Category	Members
Club Selection	Single Clubs Multiple Clubs Aggregate
Timeframe	Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD

Electronic Agreements Options

Date used in timeframes	Begin First Due Date Posted Queue Sign
Views	Approval Status Group Member Type Pay Frequency Pay Mode Payment Plan Profit Center Renewal Type Sales Person Sale Type (see sale type descriptions below) Term in Months
Available Data Columns	Count Down Payment Enhancement Fee Monthly Invoice Due Remaining Balance Sale Price
Combine Clubs	Yes (see the data from multiple clubs in aggregate) No (compare the clubs to one another)
Combine Convert and New	This option is only available with the Sale Type view. Yes (combines CONVERT-Billing and NEW-Billing into NEW-Billing; combines CONVERT-Cash and NEW-Cash into NEW-Cash) No (lists CONVERT-Billing and CONVERT-Cash separately)
More Links	Agreements

Sale Type Descriptions

The sale types will appear as shown in the following table:

Sale Type	Description
CONVERT-Billing	Convert Installment, Convert Open
CONVERT-Cash	Convert Cash, Convert Cash-Open
NEW-Billing	Installment, Open
NEW-Cash	New Cash, Cash-Open
RENEW-Billing	Installment, Open
RENEW-Cash	Renew Cash, Cash Open
REWRITE-Billing	Installment, Open
REWRITE-Cash	Rewrite Cash, Cash Open

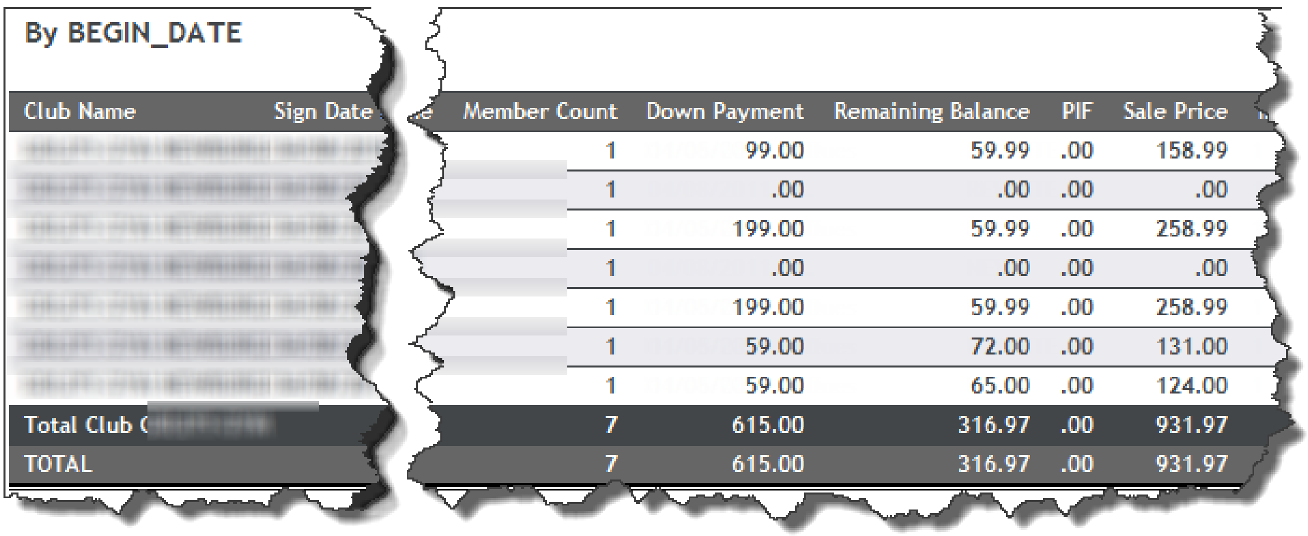
Daily Membership Sales Report

The Daily Membership Sales Report shows a list of new information about new members and key information about those members and the sale.

The Daily Membership Sales Report is available as either a PDF or in HTML format.

Note: To use the Daily Membership Sales Report, your DataTrak account must be configured. It must have an Online Business Center (OBC) login configured to access the Club Reporting System (CRS). Attach a CRS id to a DataTrak login in Manage Employees.

The following image shows a sample of a Daily Membership Sales Report.

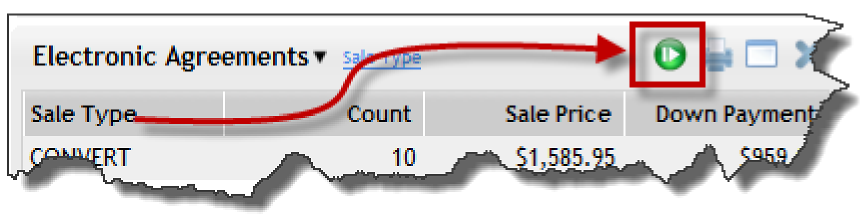


By BEGIN_DATE

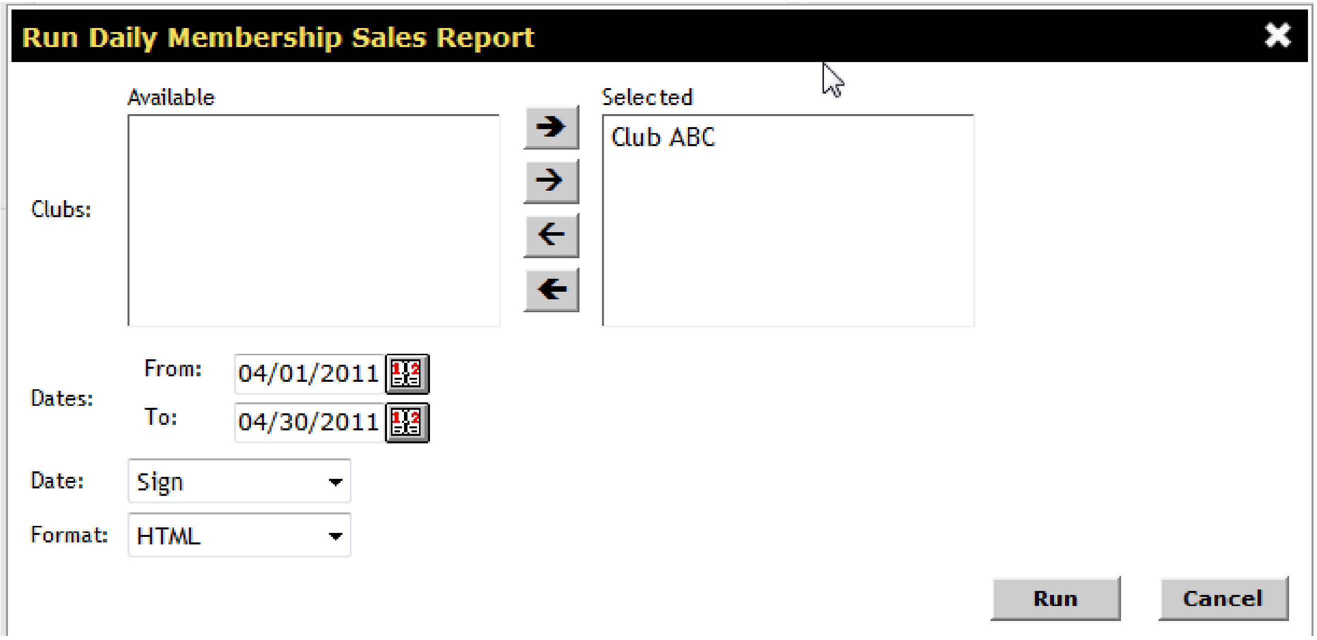
Club Name	Sign Date	Member Count	Down Payment	Remaining Balance	PIF	Sale Price
		1	99.00	59.99	.00	158.99
		1	.00	.00	.00	.00
		1	199.00	59.99	.00	258.99
		1	.00	.00	.00	.00
		1	199.00	59.99	.00	258.99
		1	59.00	72.00	.00	131.00
		1	59.00	65.00	.00	124.00
Total Club		7	615.00	316.97	.00	931.97
TOTAL		7	615.00	316.97	.00	931.97

To launch the Daily Membership Sales Report

1. Click the **Play** icon on the Electronic Agreements Item.



2. Select the options to use in the report.



- The club or clubs to include
- The date range to use on the report
- The date on the agreements to use as the basis of the report.
- The format for the report.

3. Click **Run**.
4. DataTrak opens the report in a new window.

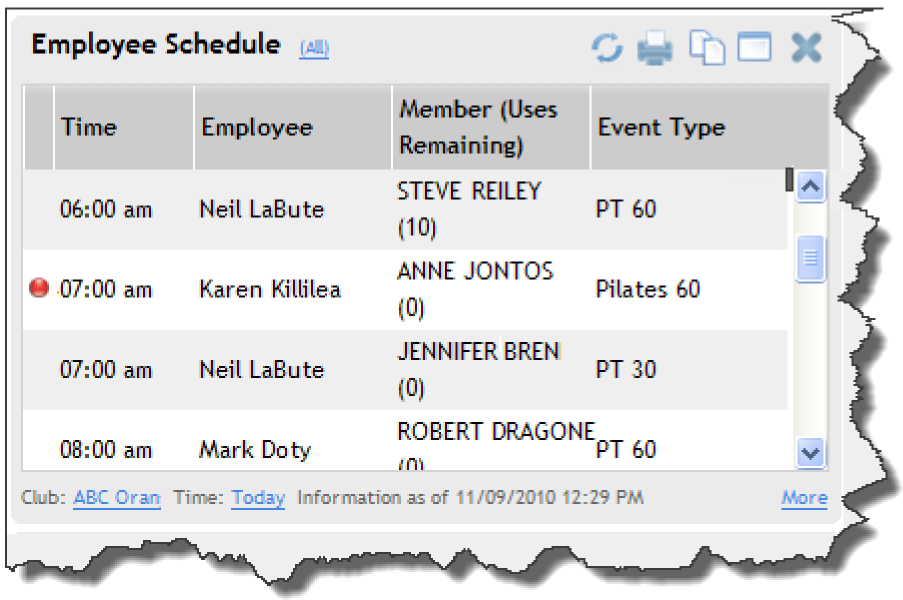
Employee Schedule

The Employee Schedule item shows employee event scheduling for a specific employee or department of employees. It also suggest opportunities, by showing the number of uses remaining for a member and colored dot indicating the opportunity level.

Note 1: For more information about using the DataTrak Scheduler, see the Scheduler topic of DataTrak Help.

Note 2: Classify opportunities from the Edit Event page. From the Calendar, click the Event name, and then use the Opportunity menu to set an opportunity level.

The following image shows an example of the Employee Schedule item.



The following table shows the filters and settings available for the Employee Schedule item.

Employee Schedule Item Options

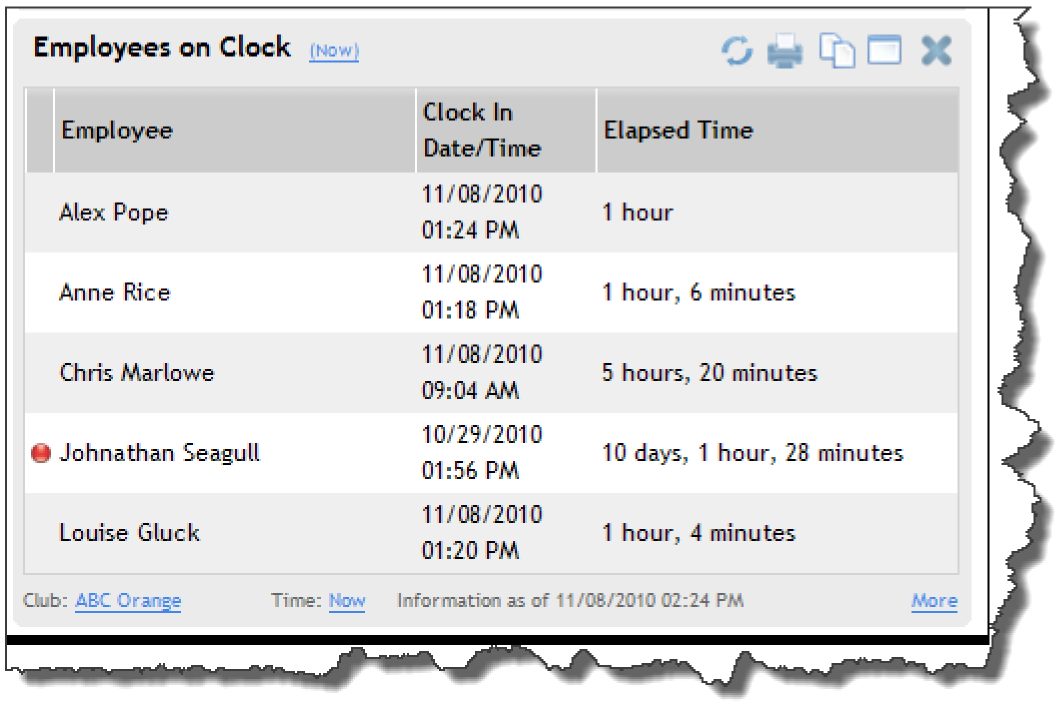
Sidebar menu Category	Employees
Club Selection	Single
Timeframes	Today Tomorrow
Employee Filters	All Employees By Department By Individual Employee (must select Department First)
More Links	Calendar (Schedule>Calendar) Manage Event (Schedule>Events)

Employees on Clock

The Employees on Clock item shows Employees currently clocked in, including their clock in date and time and the time elapsed since they clocked in.

Employees clocked in **for more than 12 hours** show a red dot next to their names.

The following image shows an example of the Employees on Clock Item.



Employees on Clock (Now)

Employee	Clock In Date/Time	Elapsed Time
Alex Pope	11/08/2010 01:24 PM	1 hour
Anne Rice	11/08/2010 01:18 PM	1 hour, 6 minutes
Chris Marlowe	11/08/2010 09:04 AM	5 hours, 20 minutes
Johnathan Seagull	10/29/2010 01:56 PM	10 days, 1 hour, 28 minutes
Louise Gluck	11/08/2010 01:20 PM	1 hour, 4 minutes

Club: ABC Orange Time: Now Information as of 11/08/2010 02:24 PM More

The following table shows the filters and settings available for the Employees on Clock item.

Employees on Clock Item Options

Sidebar menu Category	Employees
Club Selection	Single
Timeframes	Now
More Links	Timesheets (Setup>Employee>Timesheets)

Event Opportunities

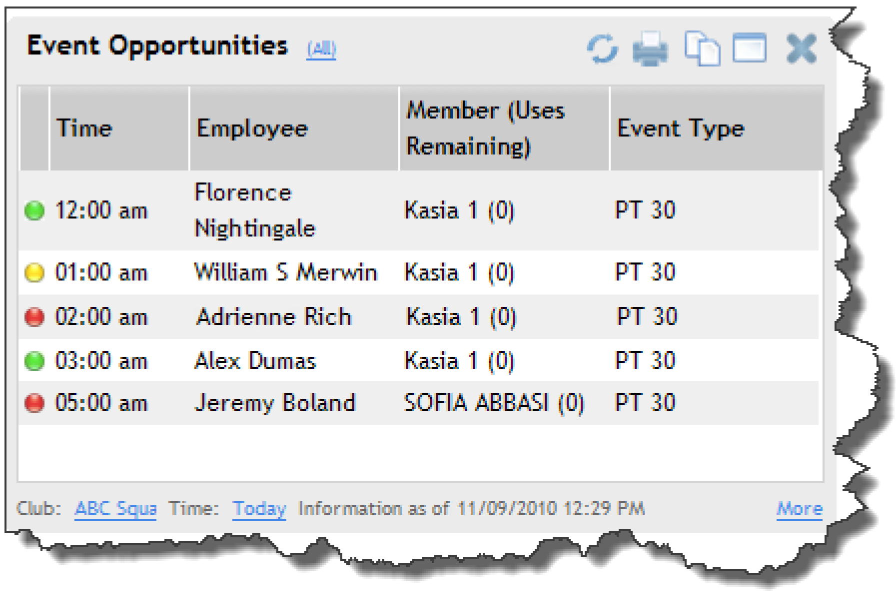
The Event Opportunities item shows clients scheduled for events today or tomorrow who are candidates for purchasing additional events.

Note: For more information about using the DataTrak Scheduler, see the Scheduler topic of DataTrak Help.

Opportunities are classified as Low, Medium, or High. Opportunity levels are displayed on the item by color. For more information about opportunities, see the Opportunity Level Setups topic of DataTrak Help.

Note: Classify opportunities from the Edit Event page. From the Calendar, click the Event name, and then use the Opportunity menu to set an opportunity level.

The following image shows an example of the Event Opportunities item.



The following table shows the filters and settings available for the Event Opportunities item.

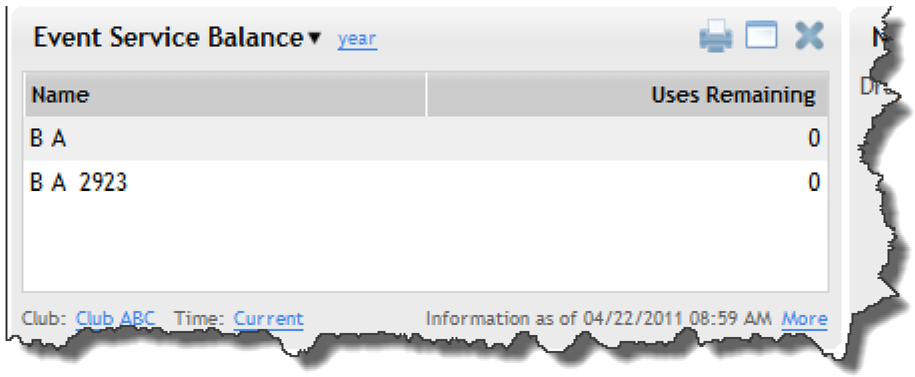
Event Opportunities Item Options

Sidebar menu Category	Sales/Receivables Members
Club Selection	Multiple
Timeframes	Today Tomorrow
Opportunity Level Filters	All Low Medium High
Employee Filters	All Employees By Department By Individual Employee (must select Department First)
More Links	Calendar (Schedule>Calendar) Manage Event (Schedule>Events)

Event Service Balance

The Event Service Balance item shows every member a specified employee has seen within a given time frame for a given event, and the uses remaining for services on the event.

The following image shows an example of the Event Service Balance item.



The following table shows the filters and settings available for the Event Service Balance item

Event Service Balance Options

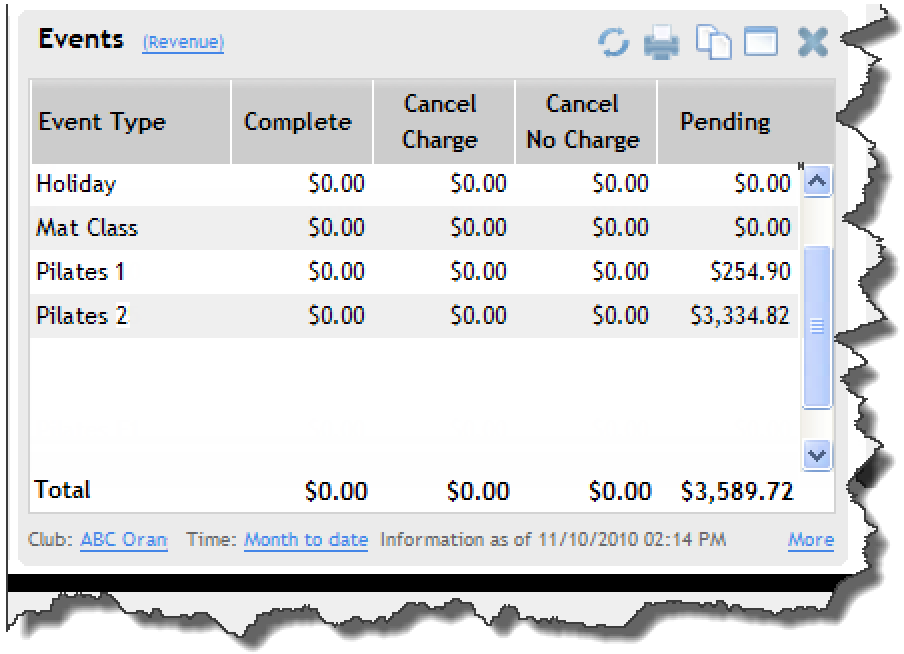
Sidebar menu Category	Employees
Club Selection	Single
Employee Filters	By Individual Employee (must select Department First)
Event Filters	Event Name Level
Seen in last (time frame)	2 months 3 months 6 months A year
More Links	Calendar

Events

The Events item shows the following information for events for the selected timeframe and filters:

- Event Type
- Complete
- Cancel Charge
- Cancel No Charge
- Pending

The following image shows an example of the Events item viewed by revenue.



The following table shows the filters and settings available for the Events item.

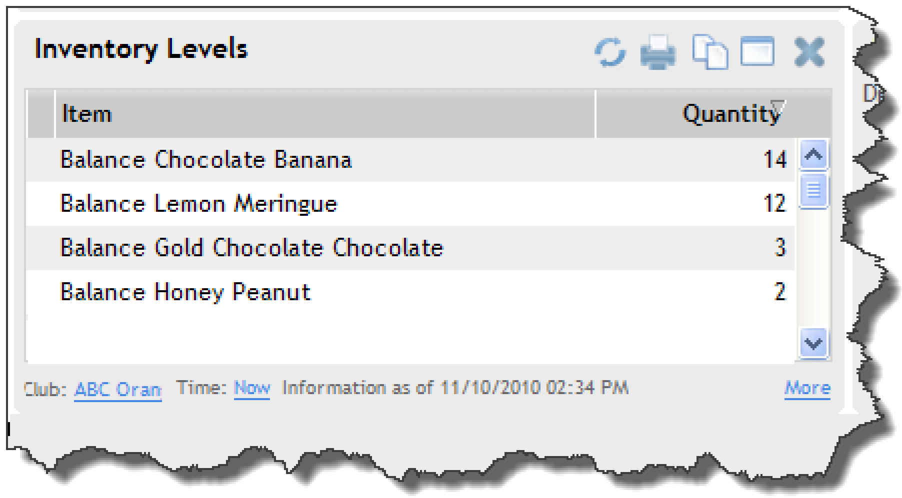
Events Options

Sidebar menu Category	Employees
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Views	Revenue Count
Employee Filters	All Employees By Department By Individual Employee (must select Department First)
More Links	Calendar (Schedule>Calendar) Manage Event (Schedule>Events)

Inventory Levels

The Inventory Levels item is tightly integrated with the Inventory setup for DataTrak. It shows inventory levels for a given club and timeframe.

The following image shows an example of the Inventory Levels item:



The following table shows the filters and settings available for the Inventory Levels item.

Inventory Levels Item Options

Sidebar menu Category	Inventory
Club Selection	Single
Timeframes	Now
More Links	Club Items (Setup>Inventory>Club Items) Rapid Restock (Setup>Inventory>Rapid Restock) Rapid Override (Setup>Inventory>Rapid Override) Inventory Update (Setup>Inventory>Inventory Update)

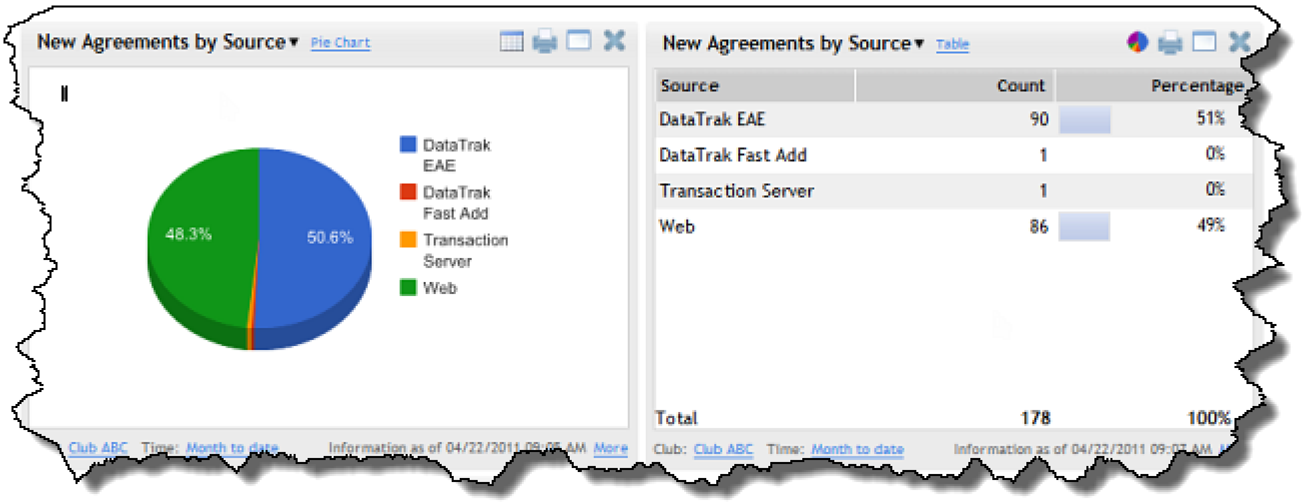
New Agreements by Source

The New Agreements by Source item shows a list of agreement sources, and the portion of all new agreements for each source. You can optionally show the Location (EAE, Fast Add, etc) for the sources as well.

You can also determine whether the item uses EAE, with the Use Electronic Agreement setting.

- **All**: Includes all agreements, whether from EAE or not.
- **Yes**: Includes only EAE agreements.
- **No**: Includes only agreements *not* from EAE.

The following image shows examples of the New Agreements by Source item displaying as a pie chart and as a table.



The following table shows the views and filters available for the NEw Agreements by Source item.

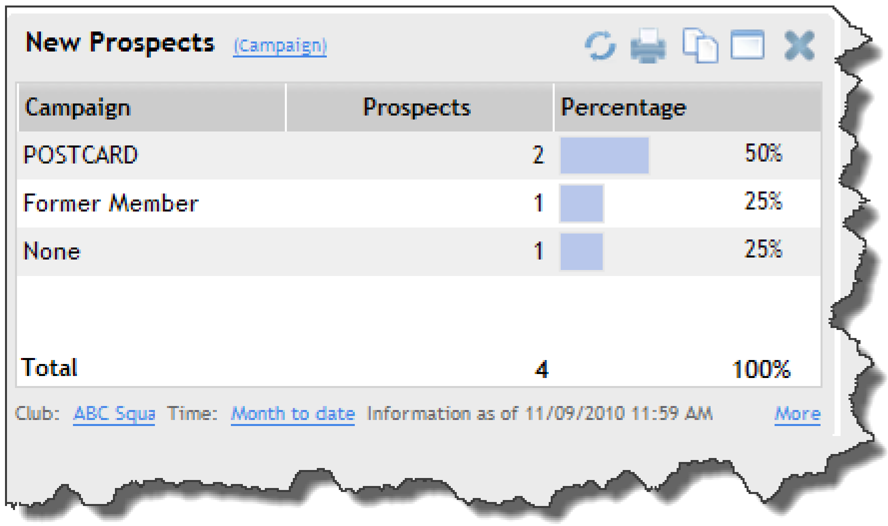
New Agreements by Source Options

Sidebar menu Category	Members
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
Display location	Yes No
Displays	Table Pie
Use Electronic Agreement	All Yes No
More links	Agreements

New Prospects

The New Prospects Item allows you to view prospect counts created either today or month to date. See counts by marketing campaign or lead priority.

The following image shows an example of the New Prospects item:



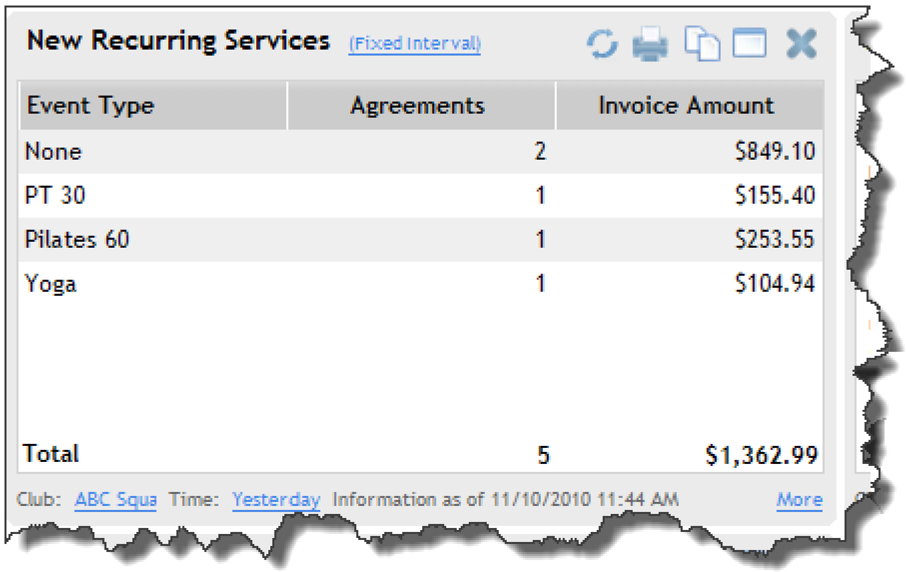
The following table shows the filters and settings available for the New Prospects item.

New Prospects Item Options

Sidebar menu Category	Members
Club Selection	Multiple
Timeframes	Today Month to Date
Views	Campaign Lead Priority
Employee Filters	All Employees By Department By Individual Employee (must select Department First)
Displays	Table Pie Chart
More Links	Manage Members (Members>Manage) Reports (Reports>Manage, Members Category)

New Recurring Services

The New Recurring Services item shows Fixed Interval Recurring Services sold for a specific club or clubs and timeframe. The item shows both Agreement counts and sales amounts. The following image shows an example of the New Recurring Services item.



The following table shows the filters and settings available for the New Recurring Services item.

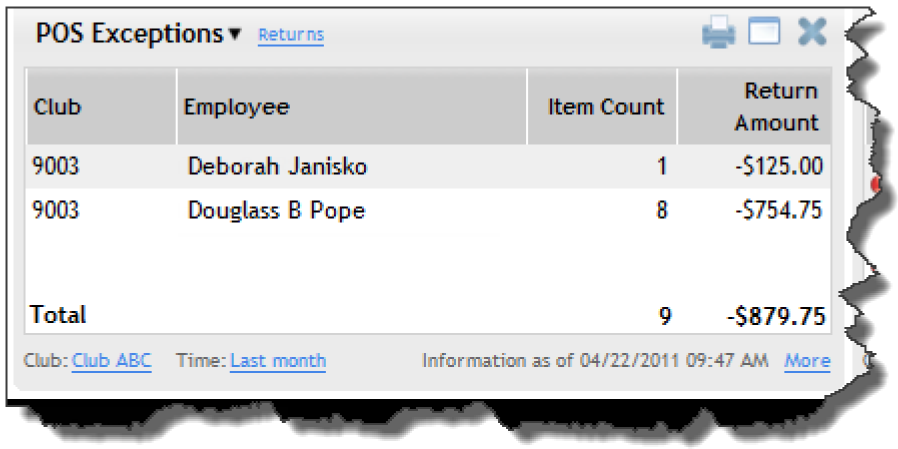
New Recurring Services Item Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month MTD Last month This month last year This month last year MTD
More Links	Recurring Services (Members>Recurring Services)

POS Exceptions

The POS Exceptions item shows information to prevent and identify possible fraud at the Point of Sale, including voids, returns, discounts, and negative price adjustments.

The following image shows an example of the POS Exceptions item, display Returns and listing the employee.



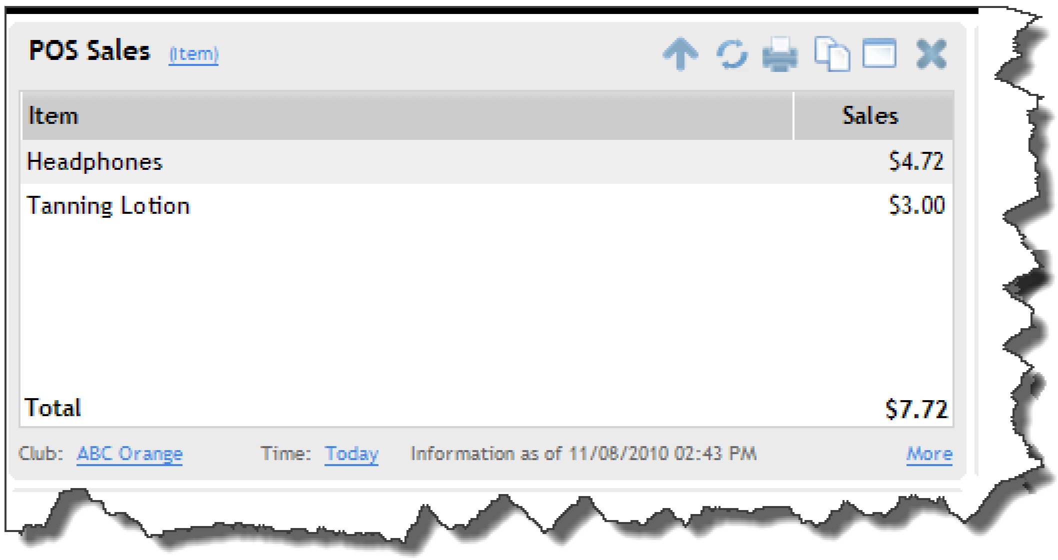
The following table shows the filters and options for the POS Exceptions item.

POS Exceptions Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month MTD Last month This month last year This month last year MTD
Views	Voids Returns Discounts Price Reductions
Show Employees	Yes No
More Links	POS Sales POS Transactions Receipts Set Goals

POS Sales

The POS Sales item shows your POS Sales revenue, whether by Profit Center Group, Profit Center, or individual item. The following image shows an example of the POS Sales item showing sales information for a single Profit Center.



Note: The POS Sales item does not include sales tax.

The POS Sales item includes drill-down links for exploring your sales data. For more information, see Using Drill-Down Links.

The following table shows the filters and settings available for the POS Sales item.

POS Sales Item Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month MTD Last month This month last year This month last year MTD
Views	Profit Center Group Profit Center Item
POS Filters	Profit Center Group selection Profit Center selection

POS Sales Item Options

Include Tax	Yes -- include tax in values displayed No -- don't include tax in values displayed
Transactions	Sales (only) All Transactions
Goals Data	Available for all views Displayed as either a numeric or percentage variance Optional bullet graph.
More Links	POS Sales (Point of Sale>Sales) POS Transactions (Point of Sale>Transactions) Receipts (Point of Sale>Receipts) Set Goals (Dashboard Set Goals page)

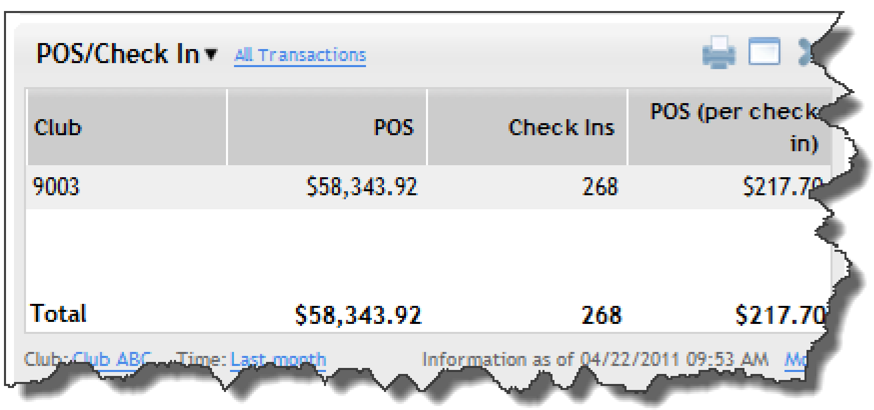
Note 1: When viewing POS information at the item level, you can only select one club at a time.

Note 2: See another view of POS information through the DataTrak report "POS by Profit Center-Summary by Item."

POS/Check In

The POS/Check In item shows the amount of POS Sales per member check in for selected clubs and profit center. You can choose whether to use only Sales or to use all transactions.

The following image shows an example of the POS/Check In item.



The following table shows the filters nad views available for the POS/Check In item.

POS/Check In Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple

POS/Check In Options

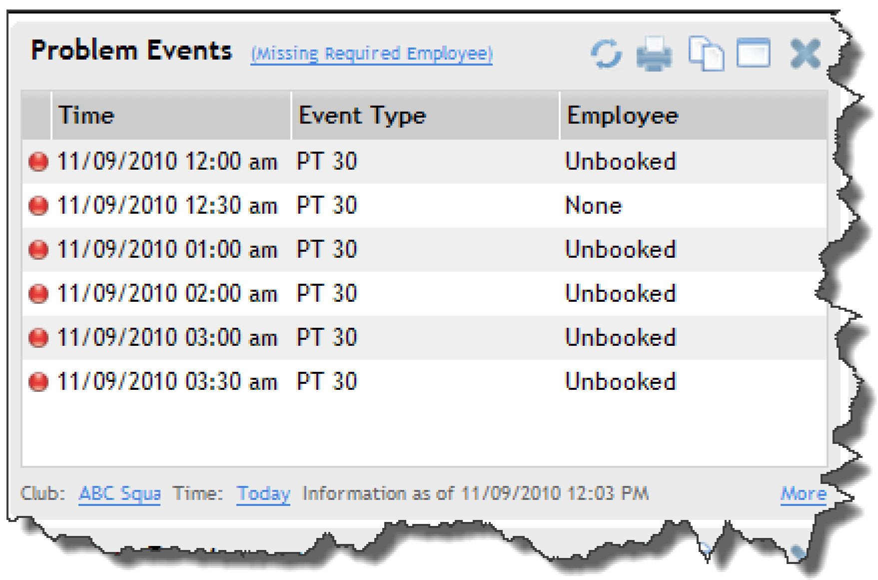
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month MTD Last month This month last year This month last year MTD
Profit Center Selection	Multiple
Include Tax	Yes -- include tax in values displayed No -- don’t include tax in values displayed
Transactions	Sales (only) All Transactions
More Links	POS Sales Reports

Problem Events

The Problem Events items shows events for today or tomorrow. Events fall into the Problem Events category when they fit one of the following criteria:

- Missing Required Employee
- Missing Required Location
- Overbooked Events
- Unfunded

The following image shows an example of the Problem Events item.



The following table shows the filters and settings available for the Problem Events item.

Problem Events Item Options

Sidebar menu Category	Members
Club Selection	Single
Timeframes	Today Tomorrow
Views	Missing Required Employee Missing Required Location Overbooked Events Unfunded
More Links	Calendar (Schedule>Calendar) Manage Event (Schedule>Events)

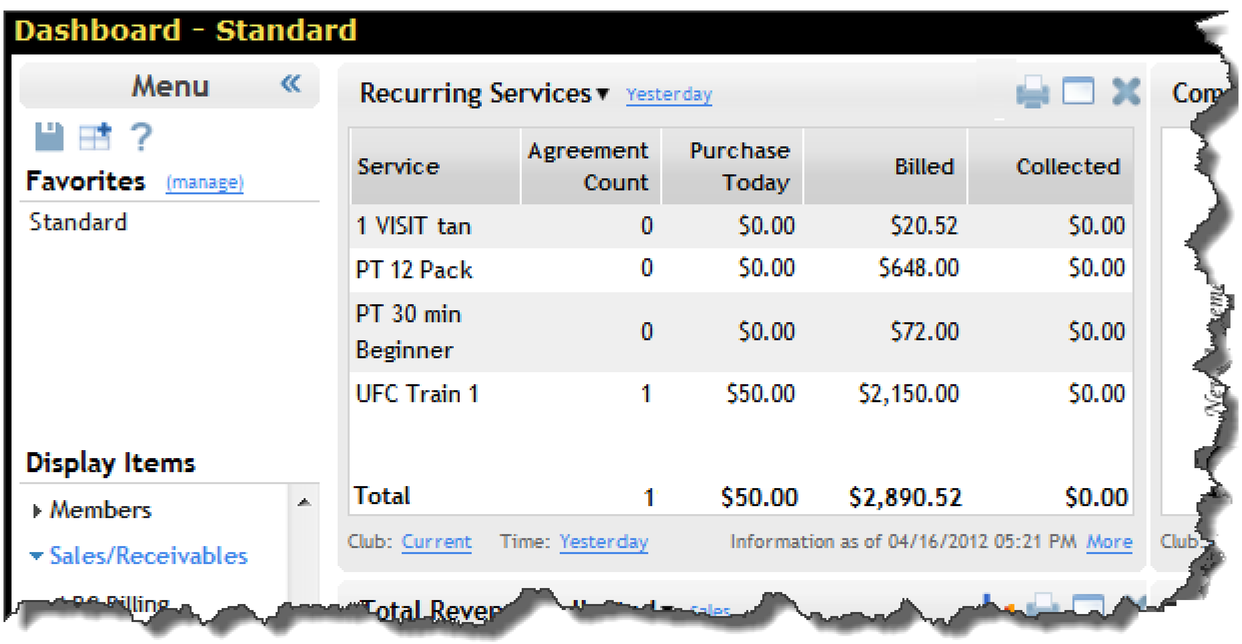
Recurring Services

The Recurring Services display item shows the number of services of a given type (catalog item) sold for the selected club and time frame along with the amount from the Purchase Today section of the recurring service. It also shows the amount Billed and subsequently Collected for all recurring services of this service type during the selected time frame.

This display item has the following columns:

Column	Description
Service	The name of the service (catalog item).
Agreement Count	The total new recurring service agreements created during the selected time frame.
Purchase Today	The total amount of the service sold at POS during the selected time frame.
Billed	The total dollar amount of all invoices dropped for this service during the selected time frame.
Collected	The total amount for this service collected by ABC through draft during the selected time frame.

An example of the Recurring Services item is shown below.



The following table shows the filters and settings available for the New Recurring Services item.

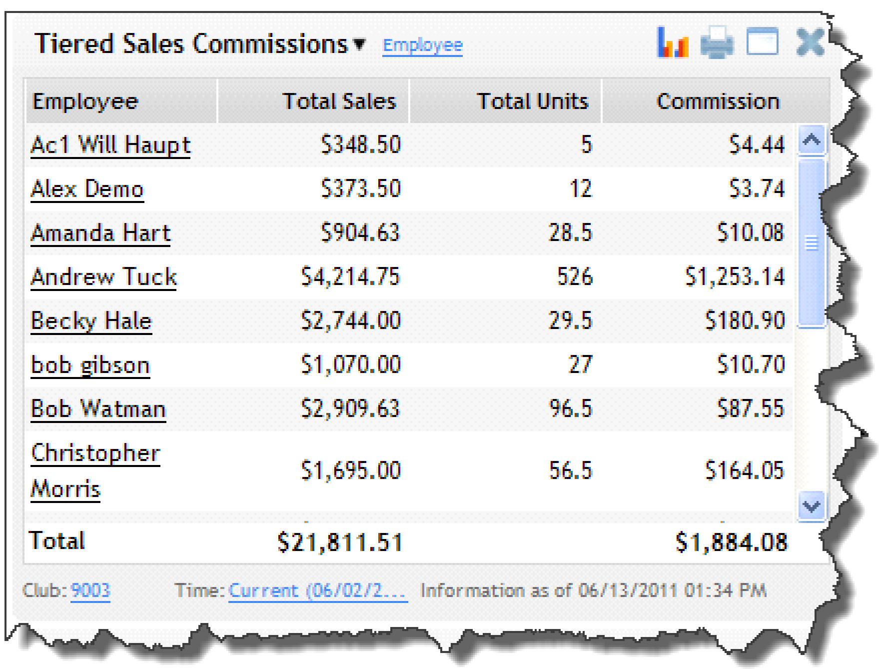
New Recurring Services Item Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Time	Yesterday This week Last week Last 7 days Month to date Last month Last month MTD This month last year This month last year MTD
More Links	Recurring Services (Members>Recurring Services)

Tiered Sales Commissions

The Tiered Sales Commissions item shows the commission information for clubs that use a tiered commissions structure. Use it to view commission based on employees or by Commission Groups.

Here's an example of the Tiered Sales Commissions item viewed by employee:



You can view Tiered Sales COmmissions by either Employee or Commission Group. Each option has drill down links to the other. For example, clicking the drill-down link for

Becky Hale shows the Commission Groups where she has earned commissions, and information about the tiers for those groups.

The following table shows the filters and settings available for the Tiered Sales Commission item.

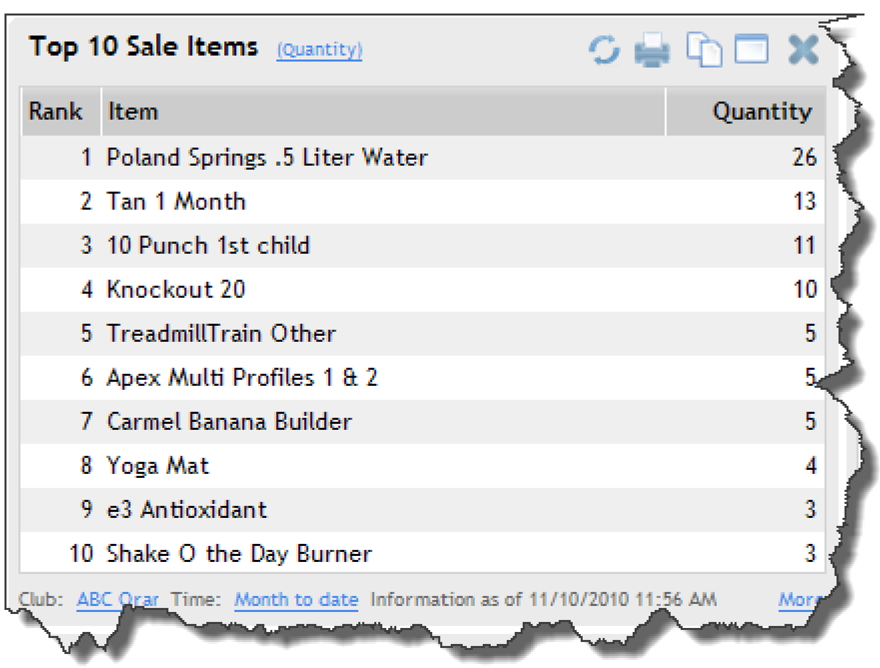
Tiered Sales Commissions Item Options

Sidebar menu Category	Sales/Receivables
Club Selection	Single
Period	Shows the Tiered Commissions Periods defined for your club, falling with most recent 55 periods.
View	Commission Group Employee
Employee Filters	By Commission Group By Employees By Department
Displays	Table Bar Graph

Top 10 Sale Items

The Top 10 Sale item shows the POS Sales items with either the greatest quantity sold or the most revenue.

The following image shows an example of the Top 10 Sale item using the number of items sold.


Top 10 Sale Items (Quantity)

Rank	Item	Quantity
1	Poland Springs .5 Liter Water	26
2	Tan 1 Month	13
3	10 Punch 1st child	11
4	Knockout 20	10
5	TreadmillTrain Other	5
6	Apex Multi Profiles 1 & 2	5
7	Carmel Banana Builder	5
8	Yoga Mat	4
9	e3 Antioxidant	3
10	Shake O the Day Burner	3

Club: ABC Qrar Time: Month to date Information as of 11/10/2010 11:56 AM More

The following table shows the filters and settings available for the Top 10 Sales item.

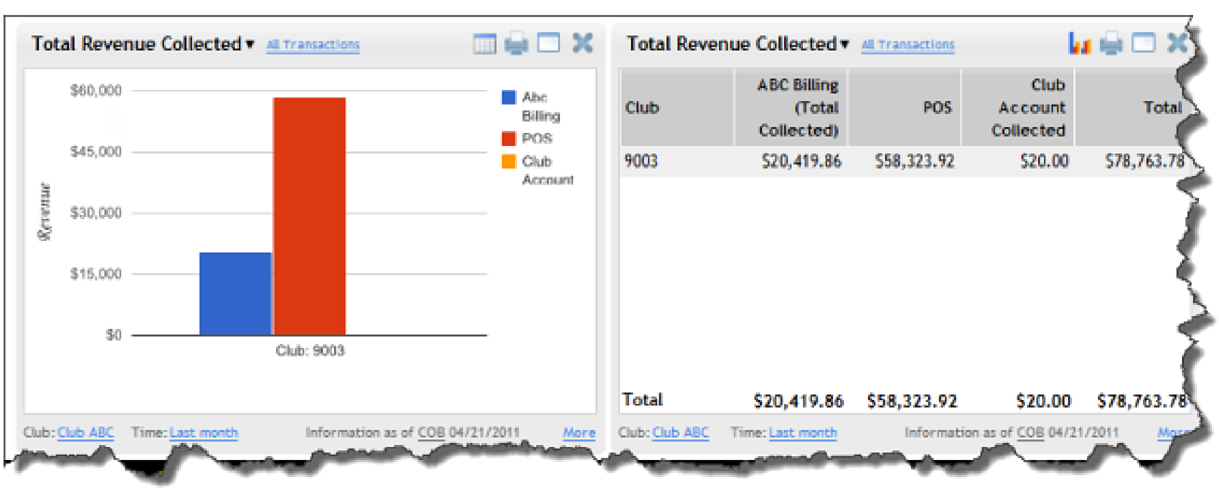
Top 10 Sales Item Options

Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Timeframes	Today Yesterday This week Last week Last 7 days Month to date Last month MTD Last month This month last year This month last year MTD
Views	Revenue Quantity
More Links	POS Sales (Point of Sale>Sales) POS Transactions (Point of Sale>Transactions) Receipts (Point of Sale>Receipts) Set Goals (Dashboard Set Goals page)

Total Revenue Collected

The Total Revenue Collected item shows revenue as a combination of ABC Billing (aka Total Collected amount on reports) POS, and Club Account income.

The following image shows examples of the Total Revenue Collected item as both a graph and a table.



The following table shows the filters and options for the Total Revenue Collected item.

Total Revenue Collected Options

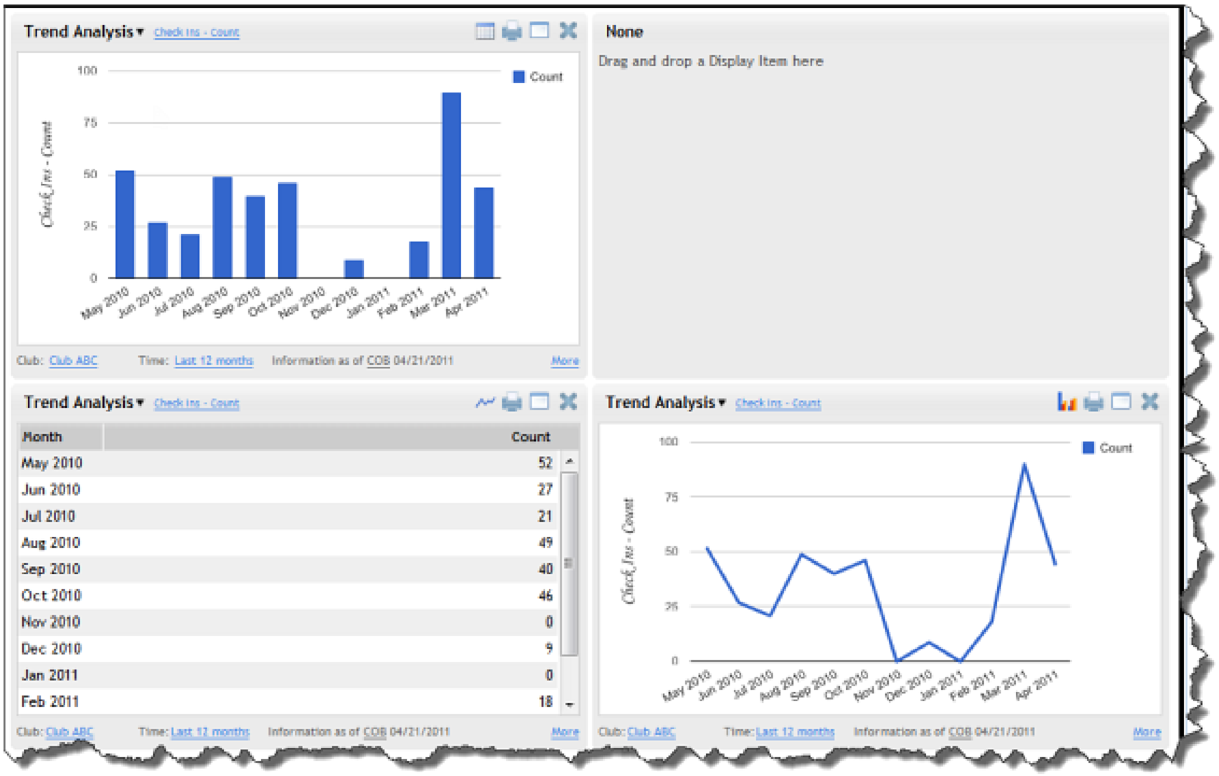
Sidebar menu Category	Sales/Receivables
Club Selection	Multiple
Timeframes	Yesterday This week Last week Last 7 days Month to date Last month MTD Last month This month last year This month last year MTD
Include Tax	Yes -- include tax in values displayed No -- don't include tax in values displayed
Transactions	Sales (only) All Transactions
Displays	Table Bar Graph
More Links	POS Sales Transactions Receipts

Trend Analysis

The Trend Analysis item shows club performance over time, using any of the following metrics:

- POS Sales
- ABC Billing
- Check Ins
- New Agreements

The following image shows examples of the Trend Analysis item using Check Ins data.



The following table shoes the options, displays, and filters for the Trend Analysis item.

Trend Analysis Options

Sidebar menu Category	Club Performance
Club Selection	Multiple
Timeframes	This Year Last Year Last 12 months
Views	New Agreements POS Cancellations Check Ins ABC Billing
Displayed Value	Count Sale Price Down Payment Monthly Invoice Due Fee Enhancement Fee Remaining Balance
Displays	Line Graph Bar Chart Table

Trend Analysis Options

Date used in timeframe	Sign Begin First Due Date Posted Queue
Combine Clubs	Yes (see the data from multiple clubs in aggregate) No (compare the clubs to one another)
More Links	Agreements Manage Members Reports

Security Roles for Dashboard

The Dashboard uses security roles to determine which users can view The Dashboard reports and set goals.

To access Dashboard security roles settings:

1. Click **Setup**.
2. Under the **Employee** heading, click **Security Roles**.
3. Click the role you want to change.
4. Click the plus icon to expand **Report Security.**
5. Click the plus icon next to **Dashboard Security**.

The following is an example of Dashboard security roles.