



RECOMMENDED REPORTS

Daily:

1. Lot Manager -> Promise Date.

Ideally, there aren't any previous days displaying which means you are completing all the promised pieces every day.

Pro Tip: If you need to hold pieces back, make sure to Split them.

<div>KPI Dashboard</div> <div>West St. Paul</div> <div>Delivery</div> <div>Detailing</div> <div>Alterations</div> <div>Customers</div> <div>Control Tower</div> <div>KPI Config</div> <div>Customer</div> <div>Cash Box</div> <div>Financials</div> <div>Inventory</div> <div>Item Activity</div> <div>Items</div> <div>Batched Lot Control</div> <div>Lot Manager</div>	Order Date Production Due Date Promise Date			Select brands Select agents Select departments			Refresh						
	Day	Orders	Items	Detail	To Clean	Spot	Alt	Press	ASM	Rush	PCS TO DO	Orders to rack	%
	Fri 02/10/23	1	1	0	1						1		0 %
	Tue 02/07/23	1	1	0	1						1		0 %
	Tue 01/31/23	1	1	0	1						1		0 %
	Mon 01/30/23	1	1	0	1						1		0 %
	Fri 01/27/23	3	4	0	2						2		50 %
	Thu 01/26/23	2	3	2									33 %
	Wed 01/25/23	53	155	4	104						104	6	30 %
	Tue 01/24/23	75	253	0	50			2			52	2	79 %
	Mon 01/23/23	151	432	0	276	2				1	278	20	36 %

2. The first 5 reports in the KPI dashboard should all be at 0 at the end of the day.

Main: Overdue Order	Main: Promised Today	Main: Undetailed Orders	Main: Items Missing Barcode	Main: Assembled Not Racked
0	0	0	0	0
Main: Picked Up Not Paid	Main: Declined	Main: New Customers This Month	Main: Late For Pick Up 30+	
\$0.00	\$0.00	1	0	

Overdue: anything promised before now that has not been completed.

Promised Today: orders promised for today.

Undetailed Orders: orders pending to be detailed.

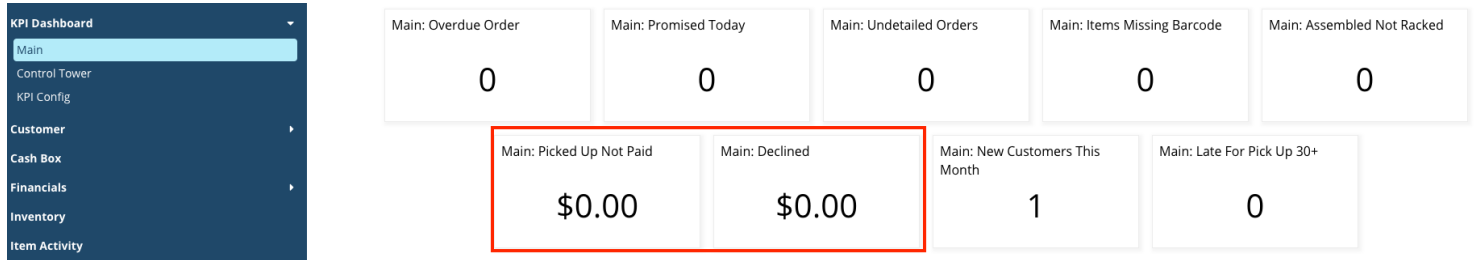
Items Missing Barcode: unless there's a good reason like bulk orders, everything should have a barcode.

Assembled Not Racked: this guarantees that all Ready messages go out in a timely manner, that AutoPay will run for any ready orders, and any Will Call customers will be scheduled for their next delivery day.



Weekly:

1. PNP & Declined reports in the KPI dashboard.



Picked up Not Paid: orders for AutoPay & POS customers that have been returned but have not been paid.

Declined: declined credit card transactions.

Pro Tip: Have communication templates in place so that regardless of who you assign to perform this task, all messages have the same 'company tone'.

2. Inventory.

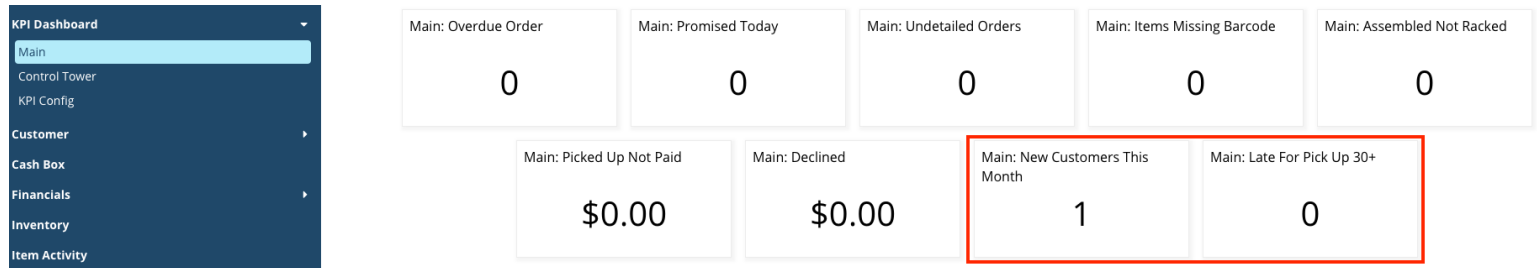
In the event that something was given to the wrong person by mistake, a weekly inventory ensures a fast resolution by having only 1 week's worth of data to sift through.

Here's a guide on how to perform Inventory: <https://support.smrtsystems.com/hc/en-us/articles/235712747>



Monthly:

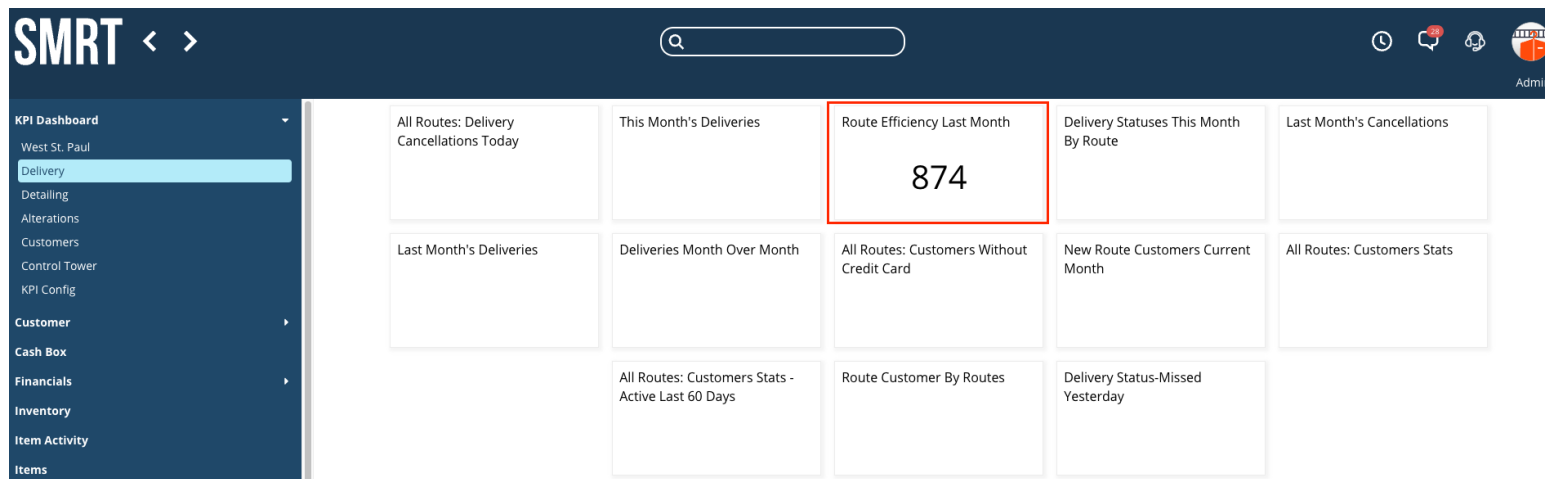
1. New Customers & Late for Pick Up reports in the KPI dashboard.



New Customers: follow up with those who don't have a first visit date, why did they sign up and never placed an order?

Late for Pick Up: follow up with those who forgot to pick up their garments (automation for this is available through our triggered base marketing).

2. Route Efficiency Last Month report in the Delivery KPI dashboard.



In this report, you want to focus on the Missed column, and sort it by customer name. If you see a name more than once, investigate how many consecutive missed stops they had to determine if they need to be switched to Will Call, or find out why they are ignoring the delivery reminders to cancel.