# Technical Documentation: Sales Manager Dashboard KPIs

This document outlines the KPIs used on the Sales Manager dashboard in a make-to-order manufacturing ERP system. These KPIs are grouped into concise cards and detailed charts, designed for operational tracking, performance monitoring, and strategic sales decision-making. Each KPI includes a definition, visual format, calculation logic, and example.

## 📋 KPI Cards

### Total Sales (MTD)

Definition: Total invoiced value for the current month.

Visual Representation: KPI Card (Monthly sales in currency).

Calculation Logic / Example:

Total Sales = Sum of invoice amounts for current month  
Example: ₹25,20,000

### New Orders Booked

Definition: Total number of new Sales Orders confirmed in the current month.

Visual Representation: KPI Card (Count value).

Calculation Logic / Example:

New Orders = Count of SOs booked in current month  
Example: 42 new SOs

### Sales Target Achievement %

Definition: Percentage of the sales target achieved for the current period (MTD/YTD).

Visual Representation: KPI Card (Percentage with trend arrow).

Calculation Logic / Example:

Achievement % = (Actual Sales / Target) × 100  
Example: ₹7.3L / ₹10L = 73%

### Top Performing Salesperson

Definition: Name and sales amount of the salesperson with highest order value.

Visual Representation: KPI Card (Name + value).

Calculation Logic / Example:

Sales by Salesperson → pick highest  
Example: Mr. A. Gupta – ₹6.5L

## 📊 Chart-based KPIs

### Monthly Sales Trend

Definition: Displays month-wise invoiced sales vs sales target over past 6–12 months.

Visual Representation: Line Chart with target overlay.

Calculation Logic / Example:

Plot actual invoice totals per month vs defined targets  
Example: Jun = ₹8L, Target = ₹10L

### Sales by Region / Segment

Definition: Breakdown of sales by customer region or type.

Visual Representation: Stacked Bar Chart or Pie Chart.

Calculation Logic / Example:

Group sales by region and sum invoice totals  
Example: North = ₹3.5L, South = ₹2.2L

### Quote to Order Conversion Rate

Definition: Shows effectiveness in converting quotations to orders.

Visual Representation: Funnel Chart or Bar Chart with trend line.

Calculation Logic / Example:

Conversion % = (Orders from Quotes / Total Quotes) × 100  
Example: 30 Orders / 60 Quotes = 50%

### Top 5 Customers

Definition: Customers contributing the highest revenue in selected period.

Visual Representation: Horizontal Bar Chart.

Calculation Logic / Example:

Rank customers by invoice total  
Example: ABC Ltd. = ₹5.2L

### Sales Order Aging / Delayed Dispatches

Definition: Displays open orders based on age since confirmation.

Visual Representation: Bar Chart grouped by aging buckets (0–7, 8–15, 15+ days).

Calculation Logic / Example:

SO Age = Today – SO Date  
Example: 7 orders >15 days old

## 📁 Drill-Down or Report-Based KPIs

### Quotation Win/Loss Report

Definition: Tracks quotations converted to orders vs those lost.

Visual Representation: Table or Bar Chart (Optional Report).

Calculation Logic / Example:

Win % = (Won Quotes / Total Quotes) × 100  
Loss % = 100 – Win %  
Example: Win = 60%, Loss = 40%

### Pending Quotations Aging

Definition: Age of open quotations still not converted or rejected.

Visual Representation: Bar Chart by quote aging bucket.

Calculation Logic / Example:

Quote Age = Today – Quote Date  
Example: 10 quotes pending >7 days

### Sales Forecast vs Actual

Definition: Compare forecasted vs actual invoiced sales.

Visual Representation: Line Chart (Forecast vs Actual).

Calculation Logic / Example:

Variance = Forecast – Actual  
Example: Forecast ₹10L, Actual ₹8.5L → Gap ₹1.5L

### Customer Order Frequency

Definition: Shows how frequently top customers place repeat orders.

Visual Representation: Table or Line Chart (Customer vs Order Count).

Calculation Logic / Example:

Frequency = Orders / Time Period  
Example: ABC Ltd. – 5 orders this quarter

### Lost Order Reasons

Definition: Analysis of why orders were lost (competitor price, lead time, etc.).

Visual Representation: Pie Chart (tag-based).

Calculation Logic / Example:

Tag lost quotes with reasons  
Example: 40% due to price, 30% lead time