Dashboards & BI

- View Master Dashboard
- View Company Dashboard
- View Top / Least Sold Items
- View Top / Least Customers
- View Top / Least Suppliers

View Master Dashboard

How to View Master Dashboard in Muhasib ERP

Overview

The **Master Dashboard** provides an interactive graphical overview of business performance across all companies managed in Muhasib ERP. It consolidates key sales information into visual charts, enabling management to monitor overall performance, identify trends, compare branches or companies, and make informed business decisions.

The dashboard is part of the Business Intelligence (BI) module and is designed to transform transactional data into meaningful visual insights for analysis and forecasting.

> **ℹ Example**
> Suppose your organization operates multiple companies or branches. The Master Dashboard allows you to compare their sales performance over the selected work period through a graphical chart, helping management quickly identify high-performing and under-performing businesses.

Before You Begin

Before viewing the Master Dashboard, ensure the following requirements are met.

Requirement	Description
Permissions	You have permission to access the Dashboard & BI module.
Business Data	Sales transactions have been recorded for one or more companies.
Dashboard Access	Dashboard & BI features are enabled for your user account.

> **Tip**
> Regularly review the Master Dashboard to monitor company performance and quickly identify significant changes in sales trends.

View Master Dashboard

Step 1: Open Dashboard & BI

Navigate to:

Back Office → Dashboard & BI → Master Dashboard

The **Interactive Dashboard** window opens.

Step 2: Review the Dashboard

The Master Dashboard automatically displays the latest business performance using an interactive graphical chart.

The dashboard summarizes the sales performance of all available companies for the configured reporting period.

> **Result**
> The Master Dashboard loads automatically and displays graphical sales performance for all companies.

Step 3: Understand the Dashboard Components

The dashboard contains the following components.

Component	Description
Performance Chart	Displays graphical sales performance for the selected work period.
Company Legend	Lists all companies represented by different chart colors.
Performance Values	Visual comparison of sales performance between companies.
Work Period	Displays sales data for the configured reporting period (for example, Last 30 Days).

> **ℹ Note**
> The dashboard is automatically generated from live transactional data recorded in Muhasib ERP. As new transactions are posted, dashboard information is updated accordingly.

Step 4: Analyze Business Performance

Use the graphical chart to compare company performance and identify business trends.

The dashboard helps management:

- Compare sales performance across companies.
- Identify top-performing companies.
- Detect declining sales trends.
- Monitor overall business growth.
- Support strategic planning and forecasting.

> **⚠ Important**
> The Master Dashboard is intended for business analysis and decision-making. It displays summarized information and does not allow users to edit transactional data directly.

Step 5: Close the Dashboard

After reviewing the graphical insights, close the Interactive Dashboard window or return to the Dashboard & BI module to access other analytical dashboards.

Result

Master Dashboard Viewed Successfully

- The Master Dashboard displays graphical sales performance for all companies.
- Business performance can be compared across multiple companies from a single screen.
- Interactive charts provide valuable insights for monitoring business growth and sales trends.
- The dashboard supports informed decision-making using real-time business data.

Best Practices

- Review the Master Dashboard regularly to monitor overall business performance.
- Compare company performance over different reporting periods to identify trends.
- Use dashboard insights together with detailed reports before making business decisions.
- Investigate significant increases or decreases in sales performance through supporting reports.
- Ensure all business transactions are recorded accurately so dashboard analytics remain reliable.

Frequently Asked Questions

What information does the Master Dashboard display?

The Master Dashboard provides a graphical overview of sales performance across all companies available in Muhasib ERP.

Does the dashboard update automatically?

Yes. Dashboard information reflects the latest recorded business transactions and updates automatically as new data becomes available.

Can I compare multiple companies?

Yes. The dashboard displays all available companies using different chart colors, making performance comparison easy.

Can I modify data directly from the dashboard?

No. The Master Dashboard is designed for analysis only. Transactional data must be modified from the appropriate ERP modules.

Why does a company not appear on the dashboard?

Companies without relevant transactional data for the reporting period may not display meaningful values on the chart.

Can the Master Dashboard be used for forecasting?

Yes. The dashboard provides historical performance trends that help management analyze business growth and support future planning and forecasting.

Related Articles

- View Company Dashboard
- View Top / Least Sold Items
- View Top / Least Customers
- View Top / Least Suppliers
- View Detailed Item Forecast Report

Next Step

Continue by learning how to **View Company Dashboard** to analyze the sales performance and business insights of an individual company.

Product: Muhasib ERP

View Company Dashboard

How to View Company Dashboard in Muhasib ERP

Overview

The **Company Dashboard** provides a real-time graphical overview of an individual company's business performance. It helps users monitor sales activity, billing summaries, notifications, and top-selling items from a single interactive dashboard, enabling faster operational and strategic decisions.

The dashboard automatically updates business insights based on the selected company and work period, making it easier to analyze performance trends without generating multiple reports.

> **ℹ Example**
> A branch manager wants to review today's sales, monthly revenue, active orders, and the most popular products. Instead of opening several reports, they can access the Company Dashboard to view all key business metrics in one place.

Before You Begin

Before viewing the Company Dashboard, ensure the following requirements are met.

Requirement	Description
Dashboard Access	You have permission to access the Dashboard & BI module.
Company Data	The selected company contains recorded sales and operational data.
Updated Transactions	Business transactions have been recorded so dashboard statistics can be generated.

> **Tip**
> Refresh the dashboard periodically to view the latest business performance and sales activity.

View the Company Dashboard

Step 1: Open the Dashboard

Navigate to:

Back Office → Interactive Dashboard

The **Interactive Dashboard** window opens displaying company performance information.

[Image Placeholder - Interactive Dashboard Window]

Step 2: Select the Sales Type

At the top of the dashboard, select the required sales type.

Option	Description
Sale	Displays statistics for completed sales transactions.
Temp Sale	Displays statistics for temporary or pending sales.

> **Note**
> Changing the sales type refreshes all dashboard widgets and charts accordingly.

Step 3: Review the Business Summary Cards

The top section displays important business indicators.

Dashboard Card	Description
Today's Sale	Shows today's total sales during the current work period.
Active Orders	Displays the number of active customer orders.
Active Registers	Shows the number of currently active POS registers or terminals.

[Image Placeholder - Summary Cards]

Step 4: Analyze the Sales Performance Chart

Review the **Last 30 Days Sales (Work Period-wise)** chart.

This graph displays daily sales performance for the previous thirty days, allowing users to quickly identify sales trends, growth, and fluctuations.

> **Result**
> The sales chart provides a visual comparison of daily sales performance over the last thirty days.

[Image Placeholder - Last 30 Days Sales Chart]

Step 5: Review the Billing Summary

The **Billing Summary (Work Period-wise)** section provides a financial snapshot of business performance.

Metric	Description
Today	Sales generated during the current work period.
This Month	Total sales generated during the current month.
This Fiscal Year	Total sales recorded during the current fiscal year.
All Time	Overall sales recorded since system implementation.

[Image Placeholder - Billing Summary]

Step 6: Review System Notifications

The **Unread Notifications** section displays important system alerts and operational messages requiring user attention.

Notification	Purpose
Low Stock Alert	Notifies users when inventory levels fall below the configured minimum stock level.

Notification	Purpose
Expired Stock Alert	Highlights inventory items that have expired or are approaching their expiration date.
System Notifications	Displays other important operational alerts generated by Muhasib ERP.

[Image Placeholder - Unread Notifications]

> **i Note**
> Notifications help users respond quickly to inventory and operational events that may require immediate action.

Step 7: View Top 10 Sold Items

The **Top 10 Sold Items** chart displays the best-performing products based on the selected analysis period.

Use this chart to identify popular products, monitor customer demand, and support inventory planning.

The dashboard allows users to analyze sales performance using the following time periods.

Analysis Period	Description
This Work Period	Displays the best-selling items during the current work period.
Last 30 Days	Displays item sales performance over the previous thirty days.
Last 1 Year	Displays yearly sales trends for the most frequently sold products.

[Image Placeholder - Top 10 Sold Items Chart]

> **Result**
> Users can quickly identify the highest-performing products and compare sales performance across different time periods.

Step 8: Close the Dashboard

After reviewing the business insights, close the dashboard or continue monitoring live business performance as new transactions are recorded.

Result

Company Dashboard Viewed Successfully

- Business performance indicators are displayed in real time.
- Sales trends can be monitored using interactive charts.
- Billing summaries provide quick financial insights.
- Unread notifications help users respond to operational events.
- Top-selling products can be analyzed over multiple time periods.
- Decision-makers can monitor company performance from a single dashboard.

Best Practices

- Review the dashboard regularly to monitor business performance.
- Use the Sales Type selector to analyze different transaction types.
- Monitor unread notifications to resolve inventory or operational issues promptly.
- Compare Top Sold Items across different time periods to identify long-term trends.
- Use dashboard insights together with detailed reports for strategic business decisions.
- Refresh the dashboard periodically to view the latest business statistics.

Frequently Asked Questions

What does the Company Dashboard display?

It displays real-time business information including sales statistics, billing summaries, notifications, sales charts, and top-selling products for the selected company.

Can I change the sales type?

Yes. You can switch between **Sale** and **Temp Sale** to analyze different transaction types.

What information is available in the Billing Summary?

The Billing Summary displays today's sales, monthly sales, fiscal year sales, and overall business sales.

What are the Top 10 Sold Items?

They represent the products with the highest sales volume during the selected analysis period.

Can I compare different time periods?

Yes. The dashboard allows you to analyze product performance for the current work period, the last 30 days, or the last year.

Do dashboard statistics update automatically?

Yes. Dashboard information reflects the latest recorded business transactions.

Related Articles

- View Master Dashboard
- View Top / Least Sold Items
- View Top / Least Customers
- View Top / Least Suppliers
- View Detailed Item Forecast Report

Next Step

Continue by learning how to **View Top / Least Sold Items** to analyze product performance and identify best-selling and slow-moving inventory.

Product: Muhasib ERP

View Top / Least Sold Items

How to View Top / Least Sold Items in Muhasib ERP

Overview

The **Top / Least Sold Items Report** helps businesses analyze product sales performance over a selected period. It enables users to identify the highest-selling and lowest-selling items based on quantity sold or generated profit.

This report provides valuable business intelligence for inventory planning, purchasing decisions, sales analysis, and product forecasting.

> **ℹ Example**
> A sales manager wants to identify the top five best-selling products during the last month or find the least-selling products that may require promotional campaigns. The Top / Least Sold Items Report provides this information instantly.

Before You Begin

Before generating the report, ensure the following requirements are met.

Requirement	Description
BI & Analytics Access	You have permission to access Dashboard & BI reports.
Sales Data	Sales transactions have been recorded for the selected date range.
Product Records	Products and categories already exist in the system.

> **□□ Tip**
> Apply filters carefully to generate more meaningful and focused sales analysis reports.

View Top / Least Sold Items Report

Step 1: Open the Report

Navigate to:

Back Office → BI and Analytics → Top / Least Sold Items Report

The **Top / Least Sold Items Report** window opens.

[Image Placeholder - Top / Least Sold Items Report Window]

Step 2: Configure Report Filters

Select the required report criteria before generating the report.

Filter	Description
Filter by Item	Search for a specific product or leave blank to include all items.
From / To Date	Specify the reporting period.
Category	Select a specific product category or choose All Categories.
Sale Type	Choose **Sale** or **Temp Sale**.
Sort By	Select **Top** or **Least** sold items.
Group By	Analyze results **Quantity Wise** or **Profit Wise**.
Top / Least Items	Specify how many products should appear in the report.

> **ℹ Note**
> You can generate reports for any date range, category, sales type, and ranking criteria to perform detailed product performance analysis.

Step 3: Generate the Report

Click the **Generate Report** button.

Muhasib ERP processes the selected filters and displays the report immediately.

> **Result**
> The Top / Least Sold Items Report is generated based on the selected criteria.

[Image Placeholder - Generated Report]

Step 4: Review the Report

The generated report contains comprehensive sales information for each listed item.

Column	Description
Item Name	Product name.
Barcode	Unique product barcode.
Unit	Unit of measurement.
Sold Quantity	Total quantity sold.
Cost Total	Total cost of sold items.
Sale Total	Total sales value.
Discount Total	Total discounts applied.
Tax Total	Total tax collected.
Profit	Profit earned from each product.

Result

Top / Least Sold Items Report Generated Successfully

- The report displays the highest or lowest selling items for the selected criteria.
- Items can be analyzed by quantity sold or profit generated.
- Results can be filtered by date range, item, category, and sale type.
- The report helps identify best-performing and underperforming products.
- The report can be printed directly from the report window.

Understanding the Report

The **Top / Least Sold Items Report** provides detailed information about item sales performance during the selected reporting period.

Report Column	Description
Item Name	Displays the product included in the report.
Barcode	Shows the item's barcode or unique identifier.
Unit	Displays the unit of measurement.
Sold Quantity	Shows the total quantity sold.
Cost Total	Displays the total cost value.
Sale Total	Displays the total sales value.
Discount Total	Shows total discounts applied.
Tax Total	Displays total tax collected.
Profit	Shows total profit generated by the item.

> **i Note**
> The displayed columns remain the same regardless of whether the report is generated using **Quantity Wise** or **Profit Wise** grouping.

Best Practices

- Select an appropriate reporting period before generating the report.
- Use Category filters to analyze specific product groups.
- Compare both Top and Least Sold Items regularly to optimize inventory.
- Use Profit Wise analysis when evaluating business profitability.
- Review least-selling products before making purchasing decisions.
- Print reports for management review or business meetings.

Frequently Asked Questions

Can I generate only the Top Sold Items?

Yes. Select **Top** from the **Sort By** option and specify the number of items.

Can I generate the Least Sold Items?

Yes. Select **Least** from the **Sort By** option before generating the report.

Can I filter the report by category?

Yes. Choose the required category from the **Select Category** dropdown.

Can I search for a specific item?

Yes. Enter the item name in the **Filter by Item** field before generating the report.

What is the difference between Quantity Wise and Profit Wise?

Quantity Wise ranks items by the number of units sold, while **Profit Wise** ranks items based on the profit generated.

Can I print the report?

Yes. Click the **Print Report** button to print the generated report.

Related Articles

- View Master Dashboard
- View Company Dashboard
- View Top / Least Customers
- View Top / Least Suppliers
- View Detailed Item Forecast Report

Next Step

Continue by learning how to **View Top / Least Customers** to analyze customer purchasing performance and business trends.

Product: Muhasib ERP

View Top / Least Customers

How to View Top / Least Customers in Muhasib ERP

Overview

The **Top / Least Customers Report** helps organizations analyze customer purchasing performance over a selected period. The report ranks customers based on either the quantity of items purchased or the profit generated from their purchases.

This report enables managers and decision-makers to identify valuable customers, recognize low-performing customers, evaluate customer groups, and make informed sales and marketing decisions.

> **ℹ Example**
> Generate a report showing the **Top 10 Customers** based on **Profit Wise** sales for the last three months to identify your most profitable customers.

Before You Begin

Before generating the Top / Least Customers Report, ensure the following requirements are met.

Requirement	Description
Permissions	You have permission to access Dashboard & BI reports.
Customer Transactions	Customer sales transactions have been recorded in Muhasib ERP.
Customer Records	Customer master records are available in the system.

> **□□ Tip**
> Use shorter reporting periods when analyzing current sales performance and longer periods for overall customer trends.

View Top / Least Customers Report

Step 1: Open the Dashboard & BI Module

Navigate to:

Dashboard & BI → Top / Least Customers

The **Top / Least Customers Report** window opens.

Step 2: Configure Report Filters

Select the required report criteria before generating the report.

Filter	Description
Filter by Customer	Search for a specific customer or leave blank to include all customers.
Date Range	Select the reporting period using the **From** and **To** dates.
Customer Group	Select a customer group or leave the default option to include all customers.
Sale Type	Choose **Sale** or **Temp Sale**.
Sort By	Select **Top** or **Least** customers.
Group By	Generate the report using **Quantity Wise** or **Profit Wise** analysis.
Top / Least Customers	Specify how many customers should appear in the report.

> **ℹ Note**
> Multiple filters can be combined to generate highly specific customer performance reports.

Step 3: Generate the Report

Click the **Generate Report** button.

Muhasib ERP processes the selected filters and generates the customer performance report.

Result
The Top / Least Customers Report is displayed based on the selected criteria.

Step 4: Review Customer Performance

Review the generated report to analyze customer purchasing activity and profitability.

The report may include the following information:

- Customer Name
- Customer Contact
- Customer Since
- Items Sold
- Cost Total
- Sale Total
- Discount Total
- Tax Total
- Profit

Important
Customer rankings change automatically as new sales transactions are recorded within the selected reporting period.

Step 5: Print the Report

Click **Print Report** to print the currently displayed report.

The printed report contains the same customer ranking and performance data shown on the screen.

Result

Top / Least Customers Report Generated Successfully

- The report displays the highest or lowest performing customers based on the selected criteria.
- Customer performance can be analyzed by quantity purchased or profit generated.
- The report can be filtered by customer, customer group, date range, and sale type.
- The report helps identify valuable customers and customers requiring additional engagement.

- The report can be printed directly for management review.

Understanding the Report

The **Top / Least Customers Report** provides a detailed overview of customer purchasing performance within the selected reporting period.

Report Column	Description
Customer Name	Displays the customer's name.
Customer Contact	Shows the customer's registered contact number.
Customer Since	Displays the customer's registration date.
Items Sold	Shows the total quantity of items purchased.
Cost Total	Displays the total cost of sold items.
Sale Total	Displays the total sales value.
Discount Total	Shows the total discount provided.
Tax Total	Displays the total tax amount.
Profit	Shows the total profit earned from the customer.

> **ℹ Note**
> The report structure remains the same regardless of whether it is generated using **Quantity Wise** or **Profit Wise** analysis.

Best Practices

- Generate reports regularly to monitor customer purchasing trends.
- Compare Top and Least Customers over different time periods.
- Use Profit Wise analysis to identify your most profitable customers.
- Use Quantity Wise analysis to identify customers with the highest purchase volume.
- Filter by Customer Group when evaluating specific customer segments.
- Print reports for business meetings and performance reviews.

Frequently Asked Questions

Can I generate only the Top Customers?

Yes. Select **Top** from the **Sort By** option before generating the report.

Can I generate the Least Customers report?

Yes. Select **Least** from the **Sort By** option.

Can I filter the report by Customer Group?

Yes. Select the required customer group before generating the report.

Can I search for a specific customer?

Yes. Enter the customer's name in the **Filter by Customer** field.

What is the difference between Quantity Wise and Profit Wise?

Quantity Wise ranks customers by the quantity of items purchased, while **Profit Wise** ranks customers according to the profit generated from their purchases.

Can I print the report?

Yes. Click **Print Report** to print the generated report.

Related Articles

- View Master Dashboard
- View Company Dashboard
- View Top / Least Sold Items
- View Top / Least Suppliers
- View Detailed Item Forecast Report

Next Step

Continue by learning how to **View Top / Least Suppliers** to evaluate supplier purchasing and procurement performance.

Product: Muhasib ERP

View Top / Least Suppliers

How to View Top / Least Suppliers in Muhasib ERP

Overview

The **Top / Least Suppliers Report** helps organizations analyze supplier purchasing performance over a selected period. The report ranks suppliers based on either the quantity of items purchased or the total purchase value, enabling businesses to evaluate supplier activity and procurement trends.

This report assists purchasing managers in identifying key suppliers, evaluating vendor relationships, monitoring procurement performance, and making informed purchasing decisions.

> **ℹ Example**
> Generate a report showing the **Top 10 Suppliers** based on **Quantity Wise** purchases during the current fiscal year to identify your most active suppliers.

Before You Begin

Before generating the Top / Least Suppliers Report, ensure the following requirements are met.

Requirement	Description
Permissions	You have permission to access Dashboard & BI reports.
Purchase Transactions	Purchase transactions have been recorded in Muhasib ERP.
Supplier Records	Supplier master records are available in the system.

> **□□ Tip**
> Generate supplier reports regularly to monitor procurement trends and evaluate supplier performance over time.

View Top / Least Suppliers Report

Step 1: Open the Dashboard & BI Module

Navigate to:

Dashboard & BI → Top / Least Suppliers

The **Top / Least Suppliers Report** window opens.

Step 2: Configure Report Filters

Select the required report criteria before generating the report.

Filter	Description
Filter by Supplier	Search for a specific supplier or leave blank to include all suppliers.
Date Range	Select the reporting period using the **From** and **To** dates.
Sort By	Choose whether to display the **Top** or **Least** performing suppliers.
Group By	Generate the report using **Quantity Wise** or **Profit Wise** analysis.
Top / Least Suppliers	Specify how many suppliers should appear in the report.

> **i Note**
> You can combine multiple filters to generate supplier reports that match specific procurement analysis requirements.

Step 3: Generate the Report

Click the **Generate Report** button.

Muhasib ERP processes the selected criteria and generates the supplier performance report.

> **Result**
> The Top / Least Suppliers Report is displayed based on the selected criteria.

Step 4: Review Supplier Performance

Review the generated report to analyze supplier purchasing activity.

The report may include the following information.

- Supplier Name
- Supplier Contact
- Supplier Since
- Items Purchased
- Purchase Total
- Discount Total
- Tax Total
- Total Amount

> **Important**
> Supplier rankings are automatically recalculated whenever new purchase transactions are recorded within the selected reporting period.

Step 5: Print the Report

Click **Print Report**.

The printed report contains the same supplier ranking and purchasing statistics currently displayed on the screen.

View the Report

After configuring the required filters, generate the report to analyze the top or least performing suppliers based on your selected criteria.

Step 5: Generate the Report

5. Review all selected filter options.
6. Click the **Generate Report** button.

Muhasib ERP processes the selected criteria and displays the **Top / Least Suppliers Report**.

Report Information Includes:

Column	Description

Sr. No.	Sequential number of each supplier in the report.
Supplier Name	Name of the supplier.
Supplier Contact	Primary contact number of the supplier.
Supplier Since	Date when the supplier was added to the system.
Items Purchased	Total quantity of items purchased from the supplier.
Purchase Total (Rs.)	Total purchase value.
Discount Total (Rs.)	Total discounts received.
Tax Total	Total tax amount.
Total Amount (Rs.)	Final purchase amount after calculations.

> **i Note**
> The report displays suppliers according to the selected **Sort By**, **Group By**, date range, supplier filter, and the number of suppliers specified.

Print the Report

If a hard copy or PDF version of the report is required, you can print it directly from the report screen.

Step 6: Print the Report

6. Click the **Print Report** button available at the top-right corner.
7. A print preview window opens.
8. Review the report.
9. Click **Print** to send the report to the selected printer.

> **Result**
> The Top / Least Suppliers Report is generated successfully and can be reviewed, analyzed, or printed for purchasing analysis and supplier performance evaluation.

Best Practices

- Use a meaningful date range for accurate purchasing analysis.
- Use **Top** suppliers to identify strategic vendors.

- Use **Least** suppliers to evaluate inactive or underutilized vendors.
- Use **Quantity Wise** when comparing purchase volume.
- Use **Profit Wise** to analyze suppliers contributing to overall profitability.
- Print reports periodically for procurement reviews and management meetings.

Related Articles

- How to View Master Dashboard in Muhasib ERP
- How to View Company Dashboard in Muhasib ERP
- How to View Top / Least Sold Items in Muhasib ERP
- How to View Top / Least Customers in Muhasib ERP
- How to View Detailed Item Forecast Report in Muhasib ERP

Product: Muhasib ERP