Dashboards and Forecasting

Use company dashboards, rankings, add-on analysis, sales analysis, and stock forecasts.

- Review the Master Dashboard
- Review the Company Dashboard
- Rank Top or Least Sold Items
- Rank Top or Least Customers
- Rank Top or Least Suppliers
- Review the Detailed Item Forecast Report
- Review the Add-on Sales Report
- Review Item-wise and Category Sales Analysis

Review the Master Dashboard

How to Review the Master Dashboard in Muhasib ERP

Overview

This guide will help you review cross-company or master-level business figures and identify areas requiring checking in a detailed report.

You get a high-level cross-company view; dashboard figures remain summary figures, not detailed record.

Who can do this

You need access to Master Dashboard and all companies shown.

Before you start

Know the reporting date, accessible companies, expected refresh time, key controls, and comparison period.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → Master Dashboard.

Review the Master Dashboard

Step 1: Confirm the displayed company aggregation and date/period

Step 2: Refresh using the supported action

Step 3: Review sales, purchase, stock, party, cash, and profit indicators shown

Step 4: Compare trends and exceptions to the prior period

Step 5: Drill into supporting reports where available

Step 6: Record filters and refresh time with any decision

Check your work

Compare and Confirm representative widgets to the same company, dates and filters operational and financial reports.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Check company permissions and refresh timing when totals seem incomplete.
- Do not add widget values whose scopes overlap.

Related guides

- Review the Company Dashboard
- Reconcile Two Muhasib Reports Safely
- Review Profit and Loss

What to do next

> **Review the Company Dashboard**.

Review the Company Dashboard

How to Review the Company Dashboard in Muhasib ERP

Overview

This guide will help you review key figures for the active company and choose the correct underlying report for follow-up.

You get a company-level operational overview and evidence-backed follow-up list.

Who can do this

You need access to Company Dashboard and relevant underlying report permissions.

Before you start

Confirm active company, reporting period, locations/terminals, refresh expectations, and comparison period.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → Company Dashboard.

Review the Company Dashboard

Step 1: Confirm company and date/period displayed

Step 2: Refresh the dashboard

Step 3: Review each KPI's label, unit, trend, and scope

Step 4: Identify material exceptions

Step 5: Open the corresponding sale, purchase, inventory, party, or financial report

Step 6: Record refresh time and supporting report filters

Check your work

Representative KPIs compare and confirm to detailed reports for the same company, period, and status scope.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Confirm active company after switching workspaces.
- Account for unposted, offline, or background-synchronized transactions.

Related guides

- Review the Master Dashboard
- Find and Open the Correct Muhasib Report
- Set Report Date, Company, Location, Terminal, and Entity Filters

What to do next

Review the Master Dashboard.

Rank Top or Least Sold Items

Rank Top or Least Sold Items

Overview

This guide will help you identify the highest- or lowest-performing sold items for a defined period and measure.

You get a ranked analytical list for merchandising or investigation.

Who can do this

You need access to Top/Least Sold Items and authorized sales/item scope.

Before you start

Choose company, period, locations, item scope, Top versus Least, result count, and ranking measure such as quantity, value, or profit where supported.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → Top/Least Sold Items.

Rank Top or Least Sold Items

Step 1: Set exact company/date/location filters

Step 2: Choose Top or Least and the supported ranking measure

Step 3: Set result count where available

Step 4: Generate/refresh

Step 5: Review rank, item, quantity/value, returns, and ties

Step 6: Compare selected items with Item-wise Sale detail

Check your work

Recalculate sample rankings from Item-wise Sale data using the same measure and return treatment.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Least results may include zero/inactive items depending on filters.
- Do not compare quantity across incompatible units without conversion.

Related guides

- Review the Item-wise Sale Report
- Review Item Analytics
- Reconcile Two Muhasib Reports Safely

What to do next

> **Review the Item-wise Sale Report**.

Rank Top or Least Customers

Rank Top or Least Customers

Overview

This guide will help you rank customers for a defined period using the report's selected sales measure.

You get a customer ranking suitable for analysis, not an automatic sales or credit decision.

Who can do this

You need access to Top/Least Customers and authorized customer/sales scope.

Before you start

Choose company, period, locations, customer/group scope, Top versus Least, result count, and measure.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → Top/Least Customers.

Rank Top or Least Customers

Step 1: Set company/date/location/customer filters

Step 2: Choose Top or Least and the supported measure

Step 3: Generate/refresh

Step 4: Review customer identity, rank, value/quantity, returns, and ties

Step 5: Drill to Customer Wise Sales and customer financial position

Step 6: Separate performance ranking from credit-risk assessment

Check your work

Recalculate samples from Customer Wise Sales using identical filters and return treatment.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Consolidate duplicate customer masters before interpreting rank.
- Do not infer profitability or collectability from sales value alone.

Related guides

- Review Customer Wise Sales
- Review Customer Financial Position
- Create a Customer

What to do next

Review Customer Wise Sales.

Rank Top or Least Suppliers

Rank Top or Least Suppliers

Overview

This guide will help you rank suppliers for a defined period using the report's selected purchasing measure.

You get a supplier purchasing ranking for sourcing analysis.

Who can do this

You need access to Top/Least Suppliers and authorized supplier/purchase scope.

Before you start

Choose company, period, supplier scope, Top versus Least, result count, and ranking measure.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → Top/Least Suppliers.

Rank Top or Least Suppliers

Step 1: Set company/date/supplier filters

Step 2: Choose Top or Least and the available measure

Step 3: Generate/refresh

Step 4: Review supplier identity, rank, value/quantity, returns, and ties

Step 5: Compare selected suppliers with Supplier Wise Purchase and supplier financial

Compare selected suppliers with Supplier Wise Purchase and supplier financial reports.

Step 6: Keep spend ranking separate from quality/lead-time assessment

Check your work

Recalculate samples from Supplier Wise Purchase using the same scope and return treatment.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Consolidate duplicate supplier masters before interpreting results.
- High spend does not prove favorable price or performance.

Related guides

- Review the Supplier Wise Purchase Report
- Review Supplier Financial Position
- Create a Supplier

What to do next

> **Review the Supplier Wise Purchase Report**.

Review the Detailed Item Forecast Report

How to Review the Detailed Item Forecast Report in Muhasib ERP

Overview

This guide will help you estimate an item's future available position and trace each included demand or supply source.

You get a planning projection; it does not reserve, purchase, transfer, or produce stock.

Who can do this

You need access to Detailed Item Forecast Report and underlying item, stock, sales-order, purchase-order, requisition, and production visibility.

Before you start

Confirm item, company, locations, horizon, on-hand baseline, reservations, open demand/supply, BOMs, units, and cutoff.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → Detailed Item Forecast Report.

Review the Detailed Item Forecast Report

Step 1: Select company, item, location scope, and horizon

Step 2: Generate/refresh the forecast

Step 3: Confirm opening on-hand/available quantity

Step 4: Review each included supply and demand row by date/source/status

Step 5: Recalculate projected running availability

Step 6: Drill to unexpected source orders or production records

Check your work

Opening plus included supply minus included demand reproduces projected availability using verified unit conversions.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Exclude cancelled/closed sources only according to actual report logic.
- Do not interpret forecast as physical availability.

Related guides

- Forecast Available and Bundled Stock
- Review Available Forecasted Stock
- Review the Stock Ledger Report

What to do next

Forecast Available and Bundled Stock.

Review the Add-on Sales Report

How to Review the Add-on Sales Report in Muhasib ERP

Overview

This guide will help you analyze add-on items sold with parent sale lines and compare and confirm their quantities and values to source transactions.

You get add-on attachment and value analysis without treating add-ons as independent parent sales.

Who can do this

You need access to Relevant Add-on Sales report plus item/add-on and sales visibility.

Before you start

Define company, period, locations, parent items, add-ons, statuses, returns, units, and expected sale-line control.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI or Sales & Customers → Add-on Sales Report, when active.

Review the Add-on Sales Report

Step 1: Confirm the report is active for the target deployment

Step 2: Set exact company/date/location/item/add-on filters

Step 3: Generate the report

Step 4: Review parent item, add-on, quantity, price/value, and return fields

Step 5: Drill to representative sale lines

Step 6: Reconcile totals to configured item add-ons and source sales

Check your work

Sample add-on totals reproduce from allowed source sale lines under the verified attribution rule.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not publish the report as active until its system launch path is confirmed.
- Align returned parent/add-on treatment and units.

Related guides

- Configure Item Add-ons
- Review the Item-wise Sale Report
- Review Item Analytics

What to do next

Configure Item Add-ons.

Review Item-wise and Category Sales Analysis

How to Review Item-wise and Category Sales Analysis in Muhasib ERP

Overview

This guide will help you compare item and category sales performance and trace category totals to item-level source data.

You get category-to-item performance analysis for merchandising or planning.

Who can do this

You need access to Relevant BI/report permissions plus item/category and sales visibility.

Before you start

Define company, period, locations, category hierarchy, items, units, statuses, returns, and performance measure.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Dashboards & BI → needed item/category analysis, when active.

Review Item-wise and Category Sales Analysis

Step 1: Confirm the active report title and launch path

Step 2: Set exact scope, category, and item filters

Step 3: Generate or refresh

Step 4: Review category/item quantities, values, returns, and other displayed metrics

Step 5: Avoid double-counting parent and child categories

Step 6: Reconcile to Item-wise Sale detail

Check your work

Non-overlapping item totals reproduce category totals and compare and confirm to source sale lines.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Do not present a source family as one active report until system titles are confirmed.
- Check historical category changes and unit differences.

Related guides

- Review the Item-wise Sale Report
- Review the Item-wise Sale Summary Report
- Create an Item Category

What to do next

Review the Item-wise Sale Report.