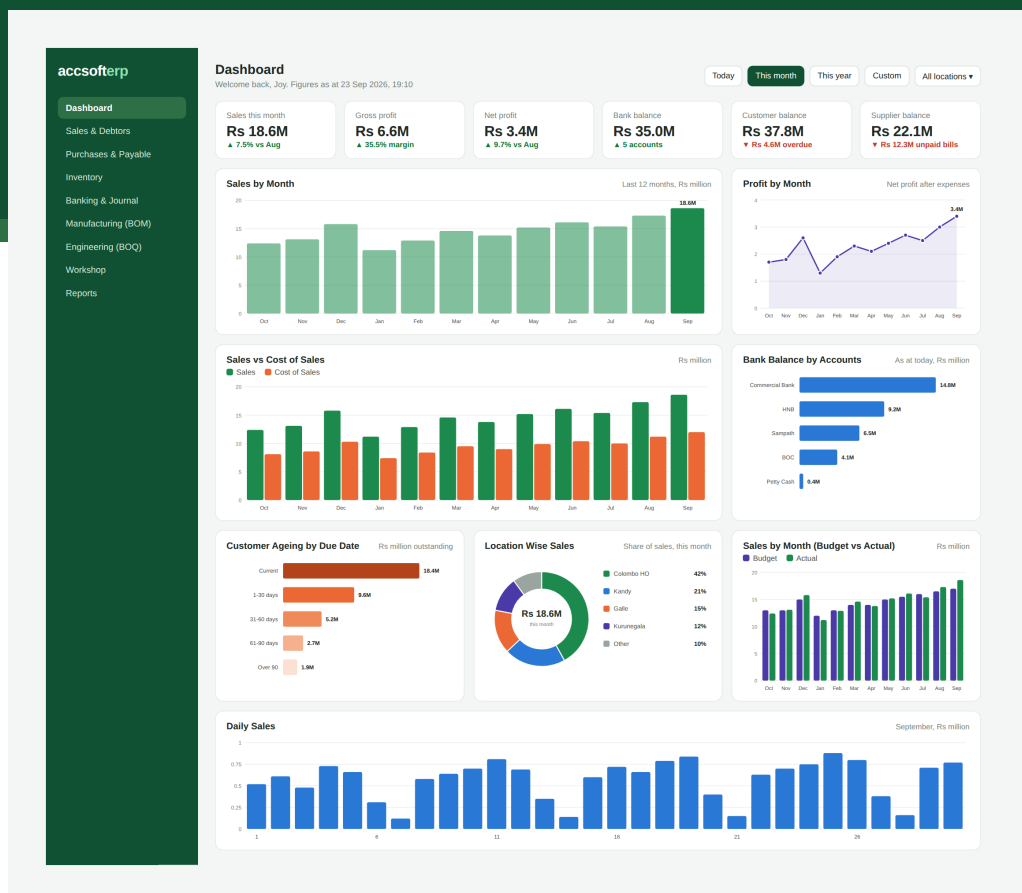


Dashboards & Business Intelligence

Your whole business on one screen, on any device

AccSoft ERP dashboards run in the browser, so the owner, the accountant and the sales manager see the same live figures on a desktop, a tablet or a phone. Sales, profit, bank balances, customer and supplier ageing, stock and financial ratios are drawn straight from the ledgers as they post, with no exports and no spreadsheets.



Dashboard home screen: six headline tiles and eight graphs, filtered by period and location

Live from the ledger

Graphs read the same ledgers the documents post to; no export, no overnight batch

Any device

Browser based and responsive: desktop, tablet and phone, nothing to install

60+ graphs

Customer, sales, supplier, stock, financial and ratio graphs by month, year and account

Budget on every line

Sales, cost of sales, gross profit, expenses and profit against budget

The dashboard home screen

The home screen answers the six questions an owner asks every morning, then shows the graphs behind them. Every graph responds to the same filters: Today, This month, This year or a custom range, and one location or all.

Headline tiles

- Sales this month, with change against last month
- Gross profit and margin
- Net profit
- Bank balance across all accounts
- Customer balance, with the overdue portion
- Supplier balance, with unpaid bills

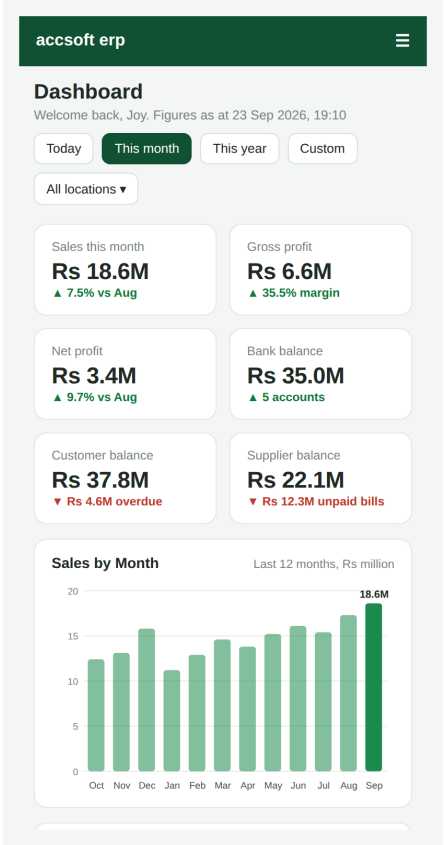
Graphs on the home screen

- Sales by Month, last twelve months
- Profit by Month
- Sales vs Cost of Sales by Month
- Bank Balance by Accounts
- Customer Ageing by Due Date
- Location Wise Sales
- Sales by Month, Budget vs Actual
- Daily Sales for the current month

Built for mobile

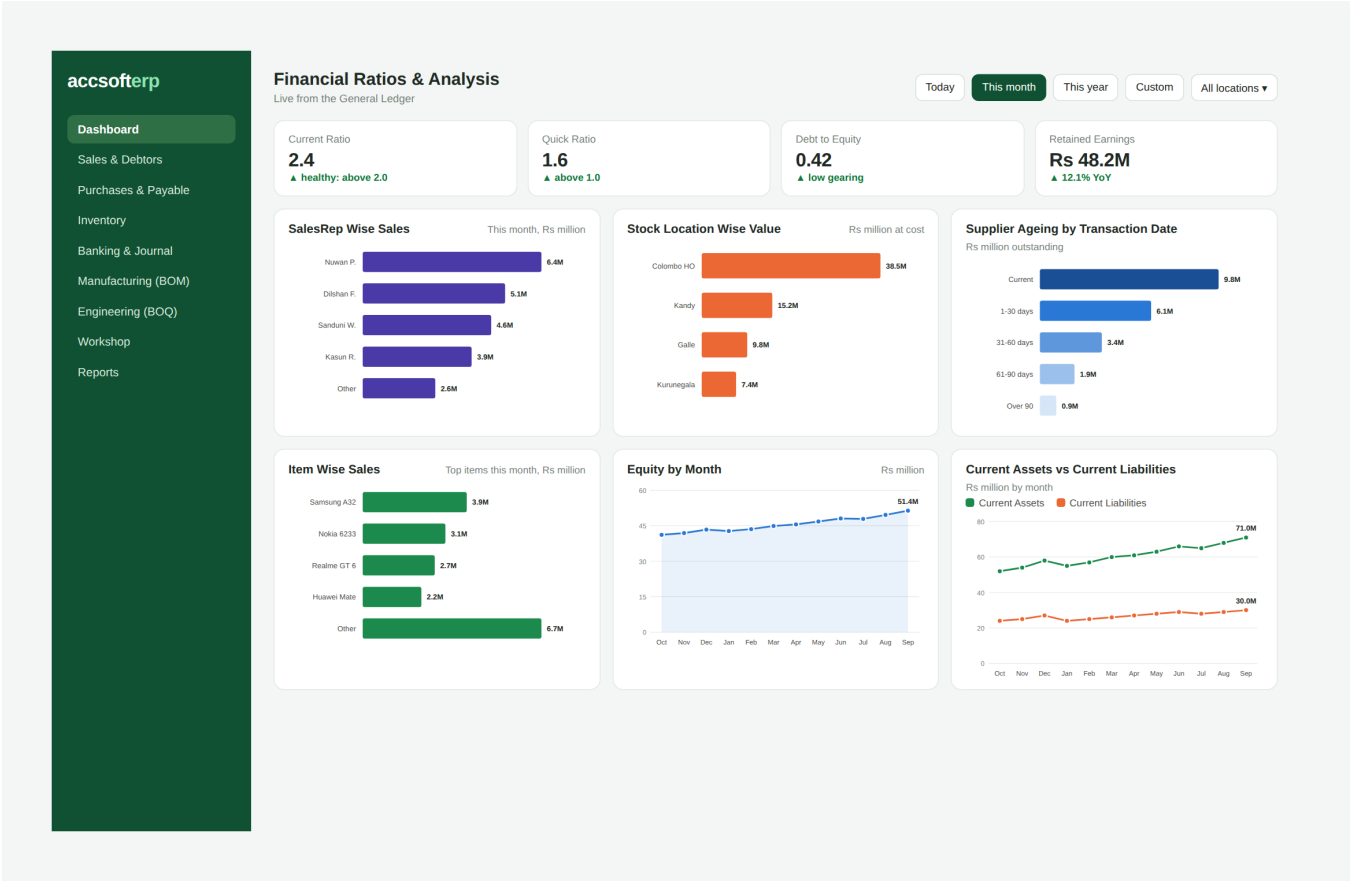
The same dashboard lays itself out for the screen it is on. Six tiles across on a desktop become two on a phone, and every graph is redrawn for the narrower screen rather than shrunk.

- Works in Chrome, Edge and Safari on Windows, Mac, Android and iOS, with nothing to install
- Same login and user permissions as the ERP, so each user sees only the modules and locations they are allowed to
- Figures refresh as documents are approved, so the phone shows the same numbers as the office
- Tap any bar or point to see the figure, and tap the graph title to open the underlying report



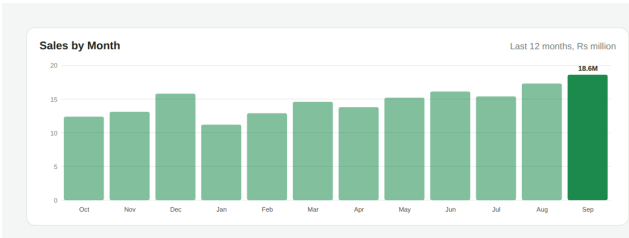
Financial ratios and analysis

Current ratio, quick ratio, debt to equity and retained earnings are calculated live from the balance sheet, with sales rep, stock, supplier ageing, item, equity and current assets against liabilities graphs alongside.

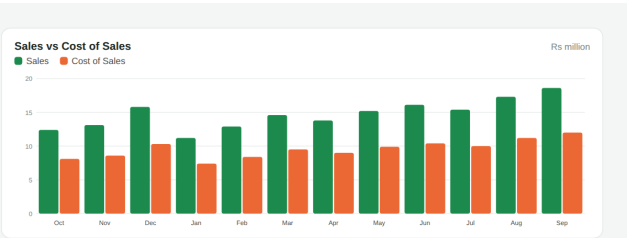


Financial ratios and analysis page

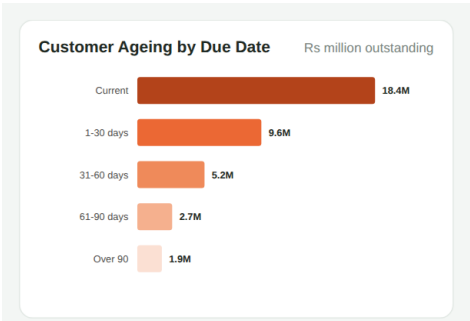
Graphs up close



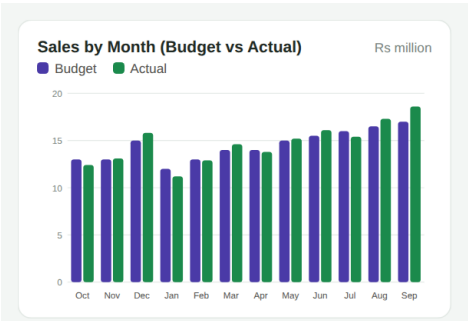
Sales by Month



Sales vs Cost of Sales



Customer Ageing by Due Date



Sales by Month (Budget vs Actual)

60+ dashboard graphs, by area

Every graph is filterable by period and location and opens the underlying report.

Customer, sales, supplier, stock and ratios (26)

Customer (7)

- Customer Balance
- Unpaid Invoices
- Overdue Invoices
- Customer Ageing by Transaction Date / by Due Date
- Open Quotations
- Open Sales Orders

Sales (8)

- Customer Wise, Sales Rep Wise, Location Wise Sales
- Transaction Wise and Item Wise Sales
- Sales Year Wise, Month Wise and Daily Sales

Supplier (4)

- Supplier Balance
- Unpaid Bills
- Supplier Ageing by Transaction Date
- Open Purchase Orders

Stock (3)

- Location Wise Quantity
- Item Wise Quantity
- Item Wise Value

Ratios (4)

- Current Ratio
- Quick Ratio
- Debt to Equity Ratio
- Retained Earnings

Financial (36)

Financial by month

- Sales, Cost of Sales, Gross Profit, Expenses and Profit by Month
- Sales vs Cost of Sales by Month
- Bank Balance by Month
- Current Assets and Current Liabilities by Month
- Current Assets vs Current Liabilities by Month
- Equity by Month
- Trade Debtors, Trade Creditors, COGS and Travelling Expenses account by Month

Financial by year

- Sales, Cost of Sales, Gross Profit, Expenses and Profit by Year
- Sales vs Cost of Sales by Year
- Current Assets vs Current Liabilities by Year
- Equity by Year

Financial by account

- Sales by Accounts
- Expenses by Accounts
- Bank Balance by Accounts
- Current Assets and Current Liabilities by Account

Budget vs actual

- Sales by Month (Budget vs Actual)
- Cost of Sales, Gross Profit, Expenses and Profit (Budget vs Actual)

Why AccSoft ERP dashboards?

Live, not exported	Every graph reads the same ledgers the documents post to. There is no overnight batch, no download to Excel and no separate BI licence.
One number everywhere	The sales figure on the owner's phone is the sales figure in the accountant's trial balance, because it is the same figure.
Budget on every graph	Sales, cost of sales, gross profit, expenses and profit each compare against the budget entered per account.
Permission aware	A branch manager sees their branch; a sales rep sees their customers; the owner sees everything.
Familiar to QuickBooks users	The home screen tiles and graphs follow the layout QuickBooks users already know, with the depth of a full ERP behind them.
Proven since 1998	AccSoft Solutions has supported Sri Lankan businesses for over 25 years, with more than 5,000 installations.

Who uses the dashboards

- Owners and directors checking sales, cash and profit from the phone
- Finance managers watching bank balances, ageing and ratios
- Sales managers tracking reps, locations and daily sales
- Purchasing managers watching supplier balances and open orders
- Branch managers with a dashboard for their own location
- Auditors and bankers reviewing ratios and budget vs actual

Frequently asked questions

Can I see the dashboard on my phone?

Yes. The dashboard runs in the browser and lays itself out for the screen it is on. Log in from Chrome or Safari on any phone or tablet and you see the same live figures as on the desktop.

How current are the figures?

Live. Graphs read the ledgers directly, so a sale shows on the dashboard as soon as the invoice is approved.

Can we compare against budget?

Yes. Enter a budget per account and the Sales, Cost of Sales, Gross Profit, Expenses and Profit graphs each show budget against actual.

Can each user have a different dashboard?

Yes. Dashboards follow the user's permissions, so a branch manager sees their location and a sales rep sees their customers.

Which ratios are available?

Current ratio, quick ratio, debt to equity and retained earnings, calculated from the live balance sheet.

See your business on one screen

Book a free demo and we will build the dashboard home screen on your own data, then open it on your phone.

erp.lk | AccSoft Solutions (Pvt) Ltd, Colombo, Sri Lanka