SHERKETY BYTES ALIGN

Exploring Dashboard Kpi and Drill Down Analysis Capabilities

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Reviewing the dashboard layout and KPI cards

On the Reporting & Analytics product page in **Sherkety ERP & Website Platform**, the dashboard example is presented as a layered workspace rather than a single chart. At the top, you typically see headline **KPI cards**. These compact tiles are designed for quick reading and usually represent high-level business measures such as revenue, expenses, margin, overdue items, or pipeline totals. Their main purpose is speed: you should be able to scan the first row and understand whether performance is healthy, slipping, or improving.

In the center area, the page highlights larger **chart widgets**. These visual blocks help you move beyond one number and see patterns across time, category, or status. A KPI card might tell you the current total, while a chart helps you understand where that total came from and whether it is moving in the right direction.

You should also expect **filter controls** near the top or above the charts. These controls commonly include a **date range selector**, business scope filters such as **company** or **business unit**, and sometimes a way to switch between preset views. When you change one of these controls, the dashboard should refresh the visible metrics so the cards and charts reflect the same reporting context.

Visual cues matter here. A KPI tile may use **color**, **trend arrows**, or comparison indicators to show whether a number is up or down compared with an earlier period. That is different from a chart widget, which is usually more interactive and better suited for deeper analysis.

[SCREENSHOT: Reporting dashboard layout with KPI cards at the top, charts in the middle, and filters above the widgets]

If you want a broader introduction to the Reporting & Analytics area before focusing on KPI behavior, see Exploring Reporting and Analytics Capabilities.

Comparing performance using filters, periods, and visual widgets

A useful dashboard is not limited to one fixed view. On the Reporting & Analytics product page, the key evaluation point is whether you can compare performance by changing **time periods** and **business segments** without leaving the dashboard. In **Sherkety ERP & Website Platform**, date controls are central to that process. Look for options that let you switch between periods such as **this month**, **last quarter**, or **year-to-date**. These period changes help you test whether the dashboard supports both short-term monitoring and longer trend review.

Once the period changes, the chart widgets become more valuable than the KPI totals alone. A single KPI card can show a total for sales or expenses, but a **bar chart** can reveal category-by-category differences, a **line chart** can show movement over time, and a **pie chart** can show mix or distribution. This is where buyers can judge whether the page supports real comparison instead of just displaying headline numbers.

Segment filters are equally important. A strong dashboard should let you narrow the view by business slice, such as:

- Sales team
- Region
- Product category
- Department
- Status group

The most important behavior is not the filter itself, but what happens after you use it. When you change a filter, multiple widgets should update together. That shared refresh shows that the dashboard supports connected analysis across functions, not isolated visuals that each tell a different story.

[SCREENSHOT: Dashboard filters showing a date range change and updated charts]

For a deeper explanation of how KPI cards and charts work together conceptually, see Understanding Dashboards KPIs and Drill Down Analysis. For examples of how reporting supports decisions, continue using Reviewing Report Sharing and Business Decision Use Cases alongside this page.

Opening drill-down views from KPI cards and charts

The most important difference between a display-only dashboard and a working analysis tool is **drill-down**. In **Sherkety ERP & Website Platform**, the product page is meant to show that a KPI card or chart is not just for viewing. When a tile or chart segment is interactive, you can select it to move from a summary number into the records behind that number.

A common path starts with a top-level KPI card. For example, if a card shows a total for overdue items, selecting that card should open a filtered list of the records contributing to that total. The same idea applies to charts. If a chart breaks down sales by category or status, selecting one bar, line point, or slice should take you to a list already narrowed to that exact segment.

From there, the workflow usually continues in two stages:

1. Open the KPI card or chart segment you want to inspect.
2. Review the filtered list that appears behind that summary.
3. Open an individual record, such as an invoice, sales order, expense entry, or opportunity, to inspect the details.

What makes this useful is **context preservation**. The destination view should keep the same filters that were active on the dashboard, such as date range, team, status, or category. That way, you do not need to rebuild the question after every click.

This matters when a number looks unusual. A spike in expenses, a drop in margin, or a sudden rise in overdue items is easier to validate when you can move directly from the dashboard total into the source records.

[SCREENSHOT: Clicking a KPI card and opening a filtered list of matching records]

If you want more background on how shared reporting views support collaboration after analysis, refer back to Sharing Reports and Supporting Decisions.

Investigating exceptions and outliers in the underlying records

Once you open a drill-down list, the next step is finding the records that explain the number. In **Sherkety ERP & Website Platform**, this is where dashboard analysis becomes practical. A KPI total can tell you that something changed, but the underlying list helps you see **which items caused the change**.

For example, a receivables KPI may lead to a list of overdue invoices, while an operations metric may lead to delayed orders or pending transactions. In these list views, the most useful tools are the visible columns, status labels, sorting options, and grouped views. Instead of scanning every row manually, you can sort by amount, due date, or status to surface the most urgent records first. Grouping can also help you spot concentration, such as whether a problem is tied to one team, one category, or one time period.

A practical investigation flow often looks like this:

1. Open the filtered list from the KPI card or chart.
2. Sort the records by amount, date, or status to find unusual items.
3. Use grouped views to see whether the issue clusters around one owner, category, or stage.
4. Open a single record to inspect its details.

Inside the individual record, you can review key information such as the document status, assigned owner, amounts, and dates. That record-level check is what confirms whether the dashboard insight reflects a real issue, a timing difference, or a small number of exceptional transactions.

This is an important buying criterion. If the reporting flow lets you move from summary to list to record without exporting data into spreadsheets, the dashboard is supporting root-cause analysis directly inside the product.

[SCREENSHOT: Filtered record list with sortable columns and grouped results]

Using dashboards to monitor different business areas

A strong dashboard should support more than one department. On the Reporting & Analytics product page in **Sherkety ERP & Website Platform**, you should evaluate whether the same dashboard style can be used across finance, sales, purchasing, inventory, and leadership review. The exact KPI set may vary, but the working pattern should remain familiar: headline cards for quick scanning, charts for trends, and drill-down access for follow-up.

Here are common analysis patterns buyers often look for:

Business area	Typical KPI focus	Common drill-down target
Sales	Pipeline totals, conversion progress, open opportunities	Opportunity lists and sales documents
Finance	Revenue, expenses, margin, overdue receivables	Invoices, expense entries, payment-related records
Purchasing	Spend totals, supplier activity, delayed purchasing items	Purchase-related lists and status views

Business area	Typical KPI focus	Common drill-down target
Inventory and operations	Movement, delays, fulfillment-related measures	Order or stock-related operational records
Leadership	High-level summary across multiple functions	Department-level lists behind each KPI

Role-specific KPI sets are especially useful. A manager should be able to focus on the measures that matter to their function without losing access to the records behind them. That balance is what makes a dashboard useful for both executive review and daily follow-up.

When you evaluate the product page, pay attention to whether you can move between high-level KPIs and detailed lists without losing your selected period or business segment. That continuity is what makes reporting feel usable instead of fragmented.

For related product-page evaluation guidance, see Exploring Dashboards KPIs and Drill Down Analysis on the Product Page.

Evaluating whether the reporting workflow fits your buying criteria

When you assess the Reporting & Analytics experience in **Sherkety ERP & Website Platform**, focus less on whether the page looks attractive and more on whether the workflow helps people answer follow-up questions quickly. A dashboard becomes valuable when it supports the full path from summary to explanation.

Start by checking whether the **KPI cards are interactive**. If a card only displays a number, it is useful for monitoring but limited for investigation. If selecting the card opens a filtered record view, the dashboard supports action as well as visibility.

Next, test whether filters can be combined in a meaningful way. During a review meeting, decision-makers often ask layered questions such as: what changed this quarter, in which team, and in which category? A useful dashboard should support combinations like:

- Period plus status
- Team plus date range
- Category plus region
- Department plus comparison period

You should also look for a **consistent navigation pattern**. The best reporting flow is predictable: dashboard widget to filtered list, then filtered list to individual record. If each click behaves differently, analysis becomes slower and harder to trust.

Finally, compare the visible examples on the product page with your own reporting needs. Finance teams may care most about revenue, expenses, margin, and overdue items. Sales teams may focus on pipeline and opportunity movement. Operations teams may need delay and throughput visibility. Leadership often needs a summary view that still allows quick inspection of the details.

[SCREENSHOT: Example reporting workflow from KPI card to list view to record detail]

If your review is focused on decision support and report sharing after analysis, return to Reviewing Report Sharing and Business Decision Use Cases. This page is the final document in the Reporting Analytics section, so it works best as your closing evaluation checklist for dashboard usability.

Overview

This page focuses on how dashboard examples on the Reporting & Analytics product page help you judge real reporting usability in **Sherkety ERP & Website Platform**. The emphasis is not on building reports from scratch, but on understanding whether the dashboard supports a complete analysis flow: scan KPI cards, adjust filters, compare trends in charts, and open the records behind the numbers.

The main areas covered in this guide are:

- The dashboard layout, including KPI cards, chart widgets, and filter controls
- How date ranges and business segment filters change the reporting view
- How interactive cards and charts open drill-down lists
- How to inspect individual records behind unusual totals or trends
- How dashboards can support finance, sales, purchasing, inventory, and executive review
- How to evaluate whether the reporting workflow matches your buying criteria

This guide builds on earlier Reporting Analytics documents instead of repeating them. If you need the broader product-level introduction, start with Exploring Reporting and Analytics Capabilities. If you want a more focused explanation of KPI behavior and chart interpretation, see Understanding Dashboards KPIs and Drill Down Analysis. If your interest is in how insights are used after review, revisit Reviewing Report Sharing and Business Decision Use Cases.

Use this page when you are comparing ERP options and want to decide whether the dashboard experience in Sherkety ERP & Website Platform supports both executive visibility and day-to-day operational follow-up from the same reporting interface.

Prerequisites

You do not need admin access or setup steps to use this guide, but it helps to be familiar with a few parts of **Sherkety ERP & Website Platform** before evaluating dashboard KPI and drill-down behavior.

Helpful background reading:

- Exploring Reporting and Analytics Capabilities
- Understanding Dashboards KPIs and Drill Down Analysis
- Reviewing Report Sharing and Business Decision Use Cases
- Reading Charts Badges and Status Colors
- Understanding Visual Priority and Highlighted Metrics

Before you start, you should be comfortable with these basic ideas:

- Reading KPI cards as summary indicators rather than full explanations
- Recognizing common chart types such as bar, line, and pie visuals
- Understanding that filters like date range, team, category, or status can change the whole dashboard view
- Expecting a drill-down path from a summary tile into a filtered list and then into a detailed record

This guide is especially useful if you are:

- Comparing Sherkety ERP & Website Platform with another ERP product
- Reviewing whether dashboards support finance, sales, operations, or leadership reporting
- Checking whether users can investigate unusual numbers without leaving the reporting flow
- Looking for a product that supports both summary monitoring and detailed follow-up in one interface

If you are still getting familiar with public product pages and navigation patterns, read Navigating Public Pages and Entry Points and Understanding Public Page Layouts and Visitor Actions first.