SHERKETY BYTES ALIGN

Exploring Dashboards Kpis And Drill Down Analysis On The Pro

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Reading the KPI cards on the reporting dashboard

On the **Reporting & Analytics** product page in **Sherkety ERP & Website Platform**, the top area typically highlights the most important business results in **KPI cards**. These cards are designed to give you a quick read on performance before you look at charts or detailed analysis. Depending on the reporting example being shown, these headline cards may represent measures such as **revenue**, **orders**, **margin**, **pipeline**, or similar high-level results.

Each **KPI card** usually combines two pieces of information:

- A **main value**, which is the current total or count
- A **comparison indicator**, which helps you understand whether the result is improving or falling behind

That comparison may appear as:

- A **percentage change**
- An **up or down trend arrow**
- A short note showing movement compared with an earlier period

[SCREENSHOT: KPI cards at the top of the Reporting & Analytics product page]

The numbers shown in these cards are tied to the reporting controls on the page. When you change the **date range** or apply available **filters**, the KPI values update to match the selected view. For example, a card showing total revenue for the year will change if you switch the report to a monthly or quarterly view. This is important when comparing results, because the cards only reflect the reporting scope currently selected on the page.

If the page allows interaction, clicking a **KPI card** can open a related analysis view or filtered report. In some layouts, hovering over a card or its indicator can also reveal extra context, such as what the metric represents or how the change was calculated.

This makes the KPI area more than a summary strip—it acts as a starting point for deeper analysis.

If you want a broader introduction to what these metrics represent, see Understanding Reporting and Analytics Module Value.

Switching between dashboard views to compare performance

The **Reporting & Analytics** product page in **Sherkety ERP & Website Platform** is most useful when you move between different visual views instead of relying on a single number. The page may present reporting content through **summary cards**, **charts**, **tables**, and other analysis sections that help you compare performance from different angles.

Look for controls that let you switch between reporting layouts, such as:

- **Tabs** for different report views
- **Preset sections** that separate summaries from detailed analysis
- **Chart and table areas** that present the same data in different formats

These view changes help you answer different questions. A **KPI card** gives you the headline result, a **chart** helps you spot movement over time, and a **table** makes it easier to compare categories side by side.

[SCREENSHOT: Reporting page with KPI cards, chart area, and table or analysis section]

When available, use the page filters to compare business areas more clearly. The product page may include selectors for dimensions such as:

- **Time period**
- **Company**
- **Team**
- **Product category**
- **Customer segment**
- **Sales channel**

As you change these filters, the visual elements should stay in sync. That means the **KPI cards**, **charts**, and **tables** should all reflect the same filtered dataset. For example, if you narrow the report to one team or one period, the headline metrics and the chart below should update together rather than showing unrelated totals.

Some reporting pages also use **saved views**, **preset report layouts**, or clearly separated sections to demonstrate common reporting perspectives without making you rebuild the analysis manually. This is especially helpful during a product review because you can move from an executive summary to a more detailed performance comparison with only a few clicks. For a deeper explanation of dashboard reading patterns, refer to Understanding Dashboards KPIs and Drill Down Analysis.

Drilling down from a KPI into the underlying records

A dashboard becomes much more useful when you can move from a summary number into the records behind it. On the **Reporting & Analytics** product page in **Sherkety ERP & Website Platform**, the drill-down experience usually starts by selecting a visible result on the page. This may be a **KPI card**, a **chart label**, a **bar**, a **line point**, or another clickable data element.

When you click a metric or chart segment, the page may open a more detailed analysis view that focuses on the selected result. That detailed view can appear as:

- A **filtered list**
- A **grouped table**
- A **pivot-style analysis area**
- A more detailed report panel showing the contributing records

[SCREENSHOT: Clicking a KPI or chart segment to open a detailed filtered view]

The goal of this step is simple: confirm what is included in the number. If a KPI shows a strong result or a sudden drop, the drill-down view helps you see which records are driving it. In the detailed screen, look for tools such as:

- **Filter chips** showing the active reporting scope
- **Grouping options** that organize rows by product, customer, salesperson, region, or period
- **Columns** that let you compare totals, counts, or trends across categories

These controls help you narrow the result set without losing the context of the original dashboard selection. For example, you might start from a total revenue card, then group the detailed view by product or customer to see which area contributed most.

To return to the higher-level dashboard, use the page's **breadcrumbs**, **back navigation**, or **report tabs** if they are available. A good reporting flow lets you move back and forth between summary and detail without starting over. That continuity is one of the clearest signs that the reporting experience supports real analysis rather than just static display.

Analyzing trends and exceptions in the reporting views

Once you move past the top KPI cards, the most valuable part of the **Reporting & Analytics** product page is learning how to read patterns. In **Sherkety ERP & Website Platform**, charts and comparison views help you understand not only what the current total is, but also whether performance is stable, improving, or showing warning signs.

Start with the visual cues on the page:

- **Trend lines** help you see movement over time
- **Comparison columns** show how one period differs from another
- **Period selectors** let you switch between shorter and longer reporting windows

These views can reveal several types of patterns:

- **Growth**, where values rise steadily
- **Decline**, where results fall over time
- **Seasonality**, where peaks and dips repeat by period
- **Sudden changes**, where a sharp jump or drop needs explanation

[SCREENSHOT: Reporting chart showing trend movement and category breakdown]

Breakdown views are especially useful when the page lets you compare categories. A chart or grouped table may separate results by:

- **Product**
- **Team**
- **Territory**
- **Customer group**

This helps you identify top performers and weaker areas without leaving the reporting page. For example, one category may be driving most of the growth while another is flattening or falling.

Exception patterns often stand out through visible contrasts in the interface. You may notice:

- Lower-than-expected conversion
- Declining margin
- Missed targets

- Spikes in returns or support-related activity

The key is not stopping at the visual warning. If a chart highlights an unusual result, use the related data point or linked analysis view to open the records behind it. That way, the dashboard moves from “something looks wrong” to “these are the exact records causing the issue.” This connection between visual insight and record-level detail is what makes dashboard analysis practical for real business decisions.

Monitoring performance over time with filters and comparisons

To get consistent value from the **Reporting & Analytics** product page in **Sherkety ERP & Website Platform**, use the page filters the same way each time you review performance. The most important control is usually the **date filter**, because it changes both the KPI totals and the chart comparisons across the page.

Common date selections may include:

- **Today**
- **This month**
- **This quarter**
- **This year**
- A **custom range**

When you switch between these options, the dashboard should recalculate the visible totals and redraw the charts to match the new reporting period. This lets you compare short-term activity with longer-term performance without leaving the page.

[SCREENSHOT: Date filter and comparison controls on the reporting page]

If the product page includes comparison tools, use them to judge whether current performance is actually good or simply larger than a smaller reporting window. Comparison modes may show results against:

- A **previous period**
- A **target**
- A **budget**
- Another visible **benchmark**

These comparisons are useful because a KPI total alone does not explain whether the result is on track. A large number may still represent underperformance if it trails the prior period or misses a target.

For ongoing monitoring, revisit the same dashboard view with the same filter choices. Consistent filters make trend reading more reliable and help you avoid comparing unrelated numbers. During a product demo, pay close attention to three things:

- Whether the page refreshes quickly when filters change
- Whether the **KPI cards** and detailed views stay consistent with each other
- How easily you can move from a summary result into deeper analysis

Those details show whether the reporting experience will support regular business review, not just a one-time presentation.

Avoiding common mistakes when interpreting dashboard metrics

Dashboards are easy to read quickly, but they are also easy to misread if you overlook the active filters or the way a chart is calculated. On the **Reporting & Analytics** product page in **Sherkety ERP & Website Platform**, a few simple checks can help you avoid drawing the wrong conclusion from a KPI or chart.

Start by reviewing the active reporting scope before trusting any number. Check whether the page is limited by filters such as:

- **Date range**
- **Company**
- **Team**
- **Category**

A KPI may look too low or too high simply because the dashboard is showing a narrower slice of data than you expected. Always confirm the selected filters before comparing one view with another.

Next, make sure the detailed view matches the summary view. When you click from a **KPI card** or chart into a drill-down screen, the detailed analysis should carry over the same filter context. If the drill-down view is broader or narrower than the dashboard, the totals may not line up. Look for visible **filter chips**, grouped headings, or report labels that confirm what is included.

[SCREENSHOT: Dashboard summary beside a drill-down view with matching filters]

It also helps to distinguish between different metric types:

- **Count-based KPIs** show how many items exist, such as orders or leads

- **Value-based KPIs** show monetary or performance totals, such as revenue or margin

Do not compare these as if they mean the same thing. A higher order count does not automatically mean higher revenue, and strong revenue does not always mean strong margin.

Finally, check how the visual is summarized. A chart may be showing:

- **Aggregated groups**
- **Percentages**
- **Raw totals**

Those formats tell different stories. Before making a decision, confirm whether you are looking at a share of the whole, a grouped comparison, or an actual total value.

Overview

This page in **Sherkety ERP & Website Platform** is meant to help you evaluate how reporting works from a buyer's point of view. Instead of focusing only on static product descriptions, the **Reporting & Analytics** product page shows how business performance can be reviewed through **KPI cards**, **charts**, **comparisons**, and **drill-down analysis**.

As you explore the page, focus on these core capabilities:

- Reading headline metrics from the **KPI cards**
- Changing the reporting scope with **date filters** and other selectors
- Switching between **summary views**, **charts**, and **tables**
- Opening a detailed view from a metric or chart point
- Returning to the dashboard without losing context

This document builds on the value-focused explanation in [Understanding Reporting and Analytics Module Value]. Here, the emphasis is on what you can actually do on the product page and how to judge whether the reporting experience is clear, connected, and useful.

The most important thing to watch is consistency. When a filter changes, the **KPI cards**, visual reports, and detailed views should all reflect the same reporting scope. When you click into a number, you should be able to see the records behind it. When you return to the dashboard, you should still understand where you are and what period or segment you are viewing.

[SCREENSHOT: Full Reporting & Analytics product page showing KPI area, charts, and detailed analysis section]

If you are reviewing Sherkety ERP & Website Platform during a demo or product comparison, this page helps you answer practical questions: Can you spot trends quickly? Can you verify a number? Can you move from summary to detail without confusion? Those are the signs of a reporting experience that supports real decision-making.

Prerequisites

Before using this page effectively, you should already be comfortable moving around the public-facing areas of **Sherkety ERP & Website Platform** and recognizing the basic layout of ERP product pages. You do not need admin access to understand the reporting product page, but it helps to know how to read common page elements such as navigation menus, tabs, filters, and visual summaries.

You will get the most from this guide if you already know how to:

- Open ERP product pages from the website navigation
- Recognize page sections such as summary blocks, charts, and call-to-action areas
- Use on-page controls like **date filters**, tabs, or category selectors when they are available
- Read visual indicators such as highlighted totals, trend arrows, and grouped charts

If you need help with the broader product navigation first, review:

- Exploring Reporting and Analytics Capabilities
- Understanding Dashboards KPIs and Drill Down Analysis
- Browsing the ERP Apps Catalog

This guide is especially useful when you are:

- Comparing reporting tools during a product evaluation
- Watching a live demo of the **Reporting & Analytics** page
- Checking whether dashboard totals and detailed records stay aligned
- Looking for proof that the reporting experience supports follow-up analysis, not just headline numbers

You do not need setup steps, imported data, or configuration work to follow along with the page walkthrough in this document. The main requirement is that you can access the **Reporting & Analytics** product page and interact with the visible dashboard examples or report sections shown there.

For the next part of this learning path, continue with Reviewing Report Sharing and Business Decision Use Cases.