SCANIT PARTS®

Advanced Reports and Analytics Guide

Getting the Most from 80+ Report Types

Part of ScanIt Parts
Inventory Management System

Innovative Programming Systems

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1. Reports Overview

ScanIt Parts has over 80 reports. They help you track daily work, measure accuracy, and spot trends. Every report can be sent to Excel with one click.

1.1 Three Report Areas

Reports fall into three groups:

Area	What It Covers	Who Uses It
Operational	Daily scanning, orders, posting, and parts activity	Parts managers, counter staff
Inventory Analytics	Perpetual accuracy, lost sales, variance trends	Parts managers, controllers
Enterprise / Dashboard	KPIs, dealer rankings, PickIt stats across all stores	Owners, regional managers, corporate

1.2 How to Access Reports

1. Log in to the ScanIt Parts dashboard
2. Click **Reports** in the left menu
3. Pick the report type you need
4. Set your date range, filters, and options
5. Click **Run Report** to view the data

> **Tip:** Set your date range and filters before you run the report. This keeps the data focused and loads faster.

2. Operational Reports

Operational reports show what happens day to day. Use them to track scanning, orders, and posting.

2.1 Scanning Activity

This report shows every scan that took place. You can filter by:

- **Scan type** - Receiving, bin changes, perpetual, part inquiry, POS
- **Date range** - Pick any start and end date
- **User** - See scans for one person or everyone

Use this to check how many scans happen each day. It tells you who scanned what and when.

2.2 Service Writer

This report shows the status of orders by service writer. It answers:

- How many orders does each service writer have?
- Which orders are open, picked, or complete?
- Are any orders stuck or waiting too long?

Parts managers use this to keep work flowing. If a service writer has too many open orders, you know to follow up.

2.3 Scanned Not On Order

This report lists parts that were scanned but not tied to any open order. Common reasons:

- The order was not pulled into ScanIt Parts yet
- The part number on the box does not match the order
- Someone scanned the wrong part

> **Note:** A few "not on order" scans per day is normal. A spike may mean orders need to be pulled more often.

2.4 Posted History

Posted History shows every part that was posted to your DMS. Each row includes:

- Part number and name
- Date and time posted
- Who scanned it
- Post status (success or error)

Use this when a part shows the wrong count in your DMS. You can trace exactly what was posted and when.

> **Tip:** Filter by "Error" status to find parts that failed to post. Fix these right away to keep your DMS in sync.

2.5 Parts Per Day

This is the go-to report for measuring work output. It breaks down daily scanning by:

- **Scan type** - Receiving, bin changes, perpetual, inquiry, POS
- **User** - Each person's totals side by side
- **Day** - One row per day so you can see trends

This report tells you how much work each person does. Managers use it to balance workloads and set goals.

2.6 Route and Employee Filters

Every operational report has Route and Employee fields. These let you:

- Filter by a single route to see only that area
- Filter by employee to see one person's work
- Combine both to see one person on one route

> **Note:** Route and Employee fields also appear in Excel exports. This makes it easy to sort and pivot the data after you download it.

3. Inventory Analytics

These reports focus on how accurate your inventory is. They help you find problems before they grow.

3.1 Perpetual Accuracy

This report tracks your accuracy over time. Each data point shows:

- The percentage of bins where the count matched the DMS
- How that number has changed week over week
- A trend line so you can see if things are getting better

Most stores start around 70-80% accuracy. With steady cycle counting, you can reach 95% or higher.

> **Tip:** Check this report once a week. A slow drop in accuracy often means counting slowed down or new staff need training.

3.2 Bins Not Counted

This report lists every bin that has not been counted in the current cycle. Use it to:

- Make sure every bin gets counted on schedule
- Find bins that keep getting skipped
- Assign uncounted bins to specific staff

Bins that never get counted are a blind spot. This report makes sure nothing is missed.

3.3 Lost Sales

Lost Sales shows parts that were out of stock when a customer needed them. Each row includes:

- Part number and name
- Date the part was needed
- Estimated dollar amount lost

This is one of the most powerful reports in ScanIt Parts. It puts a dollar value on bad inventory counts. When you show this to an owner or GM, it makes the case for better counting.

> **Important:** Lost sales data depends on accurate DMS stock levels. If your on-hand counts are wrong in the DMS, this report may not catch every lost sale.

3.4 Variance Analysis

Variance shows the gap between what your DMS says you have and what was actually counted. The report includes:

- Part number and bin location
- DMS on-hand quantity
- Counted quantity
- The difference (positive or negative)
- Dollar value of the gap

See Section 6 for how to read and act on variance data.

4. Physical Inventory Reports

Physical inventory (PI) reports cover your full-store count. They help you track progress during the count and review results after.

4.1 Count Summary

This report gives you the big picture of your PI. It shows:

- Total parts counted
- Total dollar value counted
- Counts broken down by zone or area
- How much of the store is done

Run this during the count to track progress. Run it after to see the final numbers.

4.2 Employee Productivity

This report measures how fast each person counts. It shows:

Metric	What It Shows
Counts per hour	How many bins each person counted per hour
Parts per scanner	Total parts scanned on each device
Time worked	Hours on the clock for each person

Use this to balance teams during the count. If one area is behind, move a fast counter over to help.

> **Tip:** A good benchmark is 200-300 bins per hour for experienced counters. New counters may start around 100-150.

4.3 Variance by Bin Range

This report shows which areas of your store have the most gaps. It groups variance by bin range so you can spot trouble zones.

- High-variance areas may need a recount

- Look for patterns: are the same zones off every year?
- Use this to focus follow-up work where it matters most

4.4 Multi-Year Comparison

Compare this year's PI against last year's. This report shows:

- **Shrinkage trends** - Is shrinkage going up or down?
- **Accuracy changes** - Are counts more accurate this year?
- **Value shifts** - How has total inventory value changed?

This is the report owners and controllers care about most. It shows whether your inventory practices are working over time.

> **Note:** You need at least two years of PI data in the system for this report to work. The more years you have, the clearer the trends.

4.5 Bins Not Counted

Run this before you post your PI results. It lists every bin that was not scanned during the count.

- A missed bin means those parts are not in your final count
- Check this report several times during the count, not just at the end
- Assign missed bins to staff right away so nothing is left out

> **Important:** Never post your PI until this report shows zero bins remaining. A missed bin throws off your final numbers.

5. Enterprise Reports

Enterprise reports are for multi-store groups. They pull data from all your locations into one view.

5.1 KPI Dashboard

The dashboard shows key numbers at a glance:

KPI	What It Shows
MTD Scans	Total scans this month across all stores
Perpetual Accuracy	Average accuracy for all locations
PickIt Orders	Orders picked this month
Lost Sales	Estimated revenue lost to out-of-stock parts

Each KPI card is clickable. Tap one to drill down into the details.

5.2 Top Dealers

This is a leaderboard ranked by scan volume. It shows which stores scan the most and which scan the least. Use it to:

- See which stores are using the system fully
- Spot stores that may need help or training
- Set goals based on what top stores achieve

5.3 Dealer Comparison

Put two or more stores side by side. Charts show how they compare on:

- Scan volume over time
- Perpetual accuracy trends
- Lost sales figures
- PickIt activity

This works well for monthly reviews. Pull up two stores and talk through the numbers together.

> **Tip:** Compare stores of similar size. A 20-tech store will always out-scan a 5-tech store. Focus on rates and percentages instead of raw totals.

5.4 PickIt Metrics

If your stores use PickIt, this section shows:

Metric	What It Shows
Orders picked	Total orders picked per day, week, or month
Average pick time	How long it takes to fill an order
Accuracy rates	Percentage of orders picked with no errors
Top pickers	Leaderboard of fastest and most accurate pickers

> **Note:** PickIt metrics only appear if your stores have PickIt turned on. If you do not see this section, check your PickIt setup.

5.5 Dealer Groups

Create custom groups of stores for focused reporting. For example:

- Group all Honda stores together
- Group stores by region (East, West, Central)
- Group stores by size (large, medium, small)

Once you create a group, every enterprise report can filter by it. This saves time when you only need to see a subset of your stores.

6. Reading Variance Reports

Variance reports show the gap between what you think you have and what you actually have. Learning to read them well is one of the most useful skills in parts management.

6.1 What's Normal

No inventory is perfect. Some variance is expected:

- **1-2% variance** is normal for a well-run parts department
- Small differences often come from timing: a part was sold but not yet posted
- Bulk items (nuts, bolts, clips) tend to have higher variance because they are hard to count exactly

> **Tip:** Focus on dollar value, not just piece count. A 10-piece gap in cheap clips matters less than a 1-piece gap in a $500 part.

6.2 Red Flags

Watch for these patterns. They may point to a bigger problem:

Red Flag	What It May Mean
Variance over 5% on high-value parts	Possible theft or receiving errors
Same bin is off every cycle	Bad bin label, wrong location, or miscount
One user's counts are always off	Training issue or careless counting
Negative variance on popular parts	Parts leaving without being scanned
Positive variance (more than expected)	Returns not posted, or parts received twice

6.3 Common Causes of Variance

Most variance comes from one of these four sources:

1. **Theft** - Parts taken without a record. Often high-value or easy-to-carry items.
2. **Receiving errors** - Wrong quantity entered when a shipment came in. A box of 10 counted as 1.
3. **Miscounts** - Counter skipped a shelf, counted too fast, or read the wrong bin label.

4. **Data entry errors** - Typos in the DMS. Part posted to the wrong bin or wrong quantity typed in.

6.4 What to Do About Big Variances

1. Sort the variance report by dollar value, highest first
2. Start with the top 10 items. These have the biggest impact.
3. Recount the bin yourself. Confirm the number is really off.
4. Check the DMS for recent activity: sales, returns, transfers
5. Look at Posted History to see if anything was posted wrong
6. Fix the DMS count if you confirmed the physical count is right
7. Document what you found so you can watch for the same issue next time

> **Important:** Always recount before you change DMS numbers. Adjusting based on a bad count makes things worse, not better.

7. Using Productivity Data

Parts Per Day and Counts Per Hour reports show how your team works. Used well, they help you run a tighter operation.

7.1 Set Benchmarks

Start by looking at your current numbers. Find your average, then set targets:

Metric	Good Benchmark	How to Measure
Receiving scans per day	Depends on shipment volume	Parts Per Day report, filter by Receiving
Perpetual counts per day	50-100 bins per person	Parts Per Day report, filter by Perpetual
PI counts per hour	200-300 bins for experienced counters	Employee Productivity report during PI
Pick time per order	Under 5 minutes for most orders	PickIt Metrics report

> **Tip:** Share benchmarks with your team. People work better when they know the target. Post weekly numbers where everyone can see them.

7.2 Spot Training Needs

Productivity data shows who needs help. Look for:

- **Low scan counts** - The person may not know how to use the scanner well
- **High error rates** - Parts posted wrong may mean the person rushes or skips steps
- **Slow pick times** - Could mean they do not know the bin layout yet
- **High "not on order" scans** - May not be pulling orders before scanning

Talk to the person first. Often a quick walk-through fixes the problem.

7.3 Recognize Top Performers

Use the data to reward good work:

- Call out the top scanner in a team meeting
- Share the Top Pickers leaderboard from PickIt

- Track improvement over time, not just raw numbers
- Use the data for reviews and bonus decisions

> **Note:** Speed is not everything. A fast counter with lots of errors is worse than a slower counter who gets it right. Balance speed and accuracy in your benchmarks.

8. Exporting and Sharing

Every report in ScanIt Parts can be exported to Excel. This makes it easy to share data with people who do not have a ScanIt Parts login.

8.1 How to Export

1. Run the report with your date range and filters
2. Review the data on screen to make sure it looks right
3. Click the **Export to Excel** button
4. The file downloads to your computer
5. Open it in Excel, Google Sheets, or any spreadsheet app

> **Tip:** Filter before you export. If you only need one route or one employee, set those filters first. This gives you a clean file with just the data you need.

8.2 Sharing Tips

Here are some common ways to share report data:

Who	What to Send	How Often
Parts manager	Parts Per Day, Scanning Activity, Variance	Weekly
General manager	Lost Sales, Perpetual Accuracy, Count Summary	Monthly
Controller / accountant	PI Count Summary, Multi-Year Comparison, Variance by Bin Range	After each PI
Corporate / regional	Enterprise KPIs, Top Dealers, Dealer Comparison	Monthly

> **Note:** Enterprise users can view reports for all stores from one login. They do not need exports unless they want to work with the data in a spreadsheet.

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