Enterprise User Guide

Centralized Reporting for Dealership Groups

Part of ScanIt Parts
Inventory Management System

Innovative Programming Systems
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1. Enterprise Overview

1.1 What is Enterprise?

ScanIt Parts Enterprise is a single dashboard for dealership groups that run more than one location. Instead of logging into each dealer's ScanIt Parts dashboard one by one, Enterprise shows all of them in one place.

You can view scan activity, inventory numbers, order status, and lost sales across your whole group. Data from every linked location is pulled together into easy-to-read reports with sortable tables, charts, and trend views.

Key Benefits:

- See all dealers on one screen
- Compare results across locations
- Track scanning use and activity
- Find lost sales across the group
- Export any report to PDF or Excel
- Create custom dealer groups for focused views

1.2 Accessing Enterprise

Enterprise is a web-based dashboard. You open it in your browser. No software install is needed.

1. Open your web browser (Chrome, Edge, Firefox, or Safari)
2. Go to your Enterprise URL (your admin will give you this)
3. Log in with your ScanIt Parts email and password

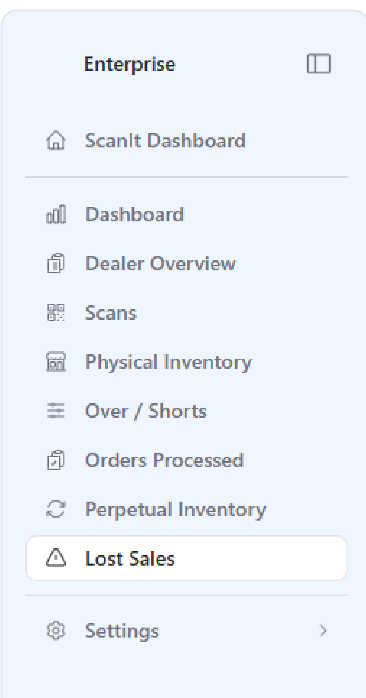
Tip: Bookmark the Enterprise URL for quick access. You can use the same login you use for the regular ScanIt Parts dashboard.

Access Required: An IPS admin must grant you Enterprise access. If you see "Invalid access," contact your admin or IPS support to get the Enterprise role added to your account.

1.3 Navigation

Enterprise uses a sidebar on the left side of the screen. The sidebar has links to all report pages:

Menu Item	What It Shows
Dashboard	Summary with KPIs, charts, and activity tables
Dealer Overview	All dealers with inventory numbers at a glance
Scans	Scan activity broken down by dealer and type
Physical Inventory	Physical inventory results across dealers
Over/Shorts	Shipping gaps tracked by dealer and store
Orders Processed	Order finish rates per dealer
Perpetual Inventory	Cycle counting progress per dealer
Lost Sales	Revenue lost to stockouts by dealer
Settings	Dealer Groups setup



2. Executive Dashboard

The Dashboard is the first page you see when you open Enterprise. It gives you a quick view of your whole group's parts activity. The page has these sections:

- KPI cards at the top
- A Top Dealers leaderboard
- Charts that show trends
- Detailed activity tables
- Extra sections for Lost Sales and PickIt (when data exists)

> **Auto-Refresh:** The dashboard refreshes every 60 seconds so you always see current data. Data is cached for 2 minutes to keep pages loading fast.

2.1 KPI Cards

At the top of the dashboard, you will see KPI (Key Performance Indicator) cards. Each card shows a key metric with a change arrow:

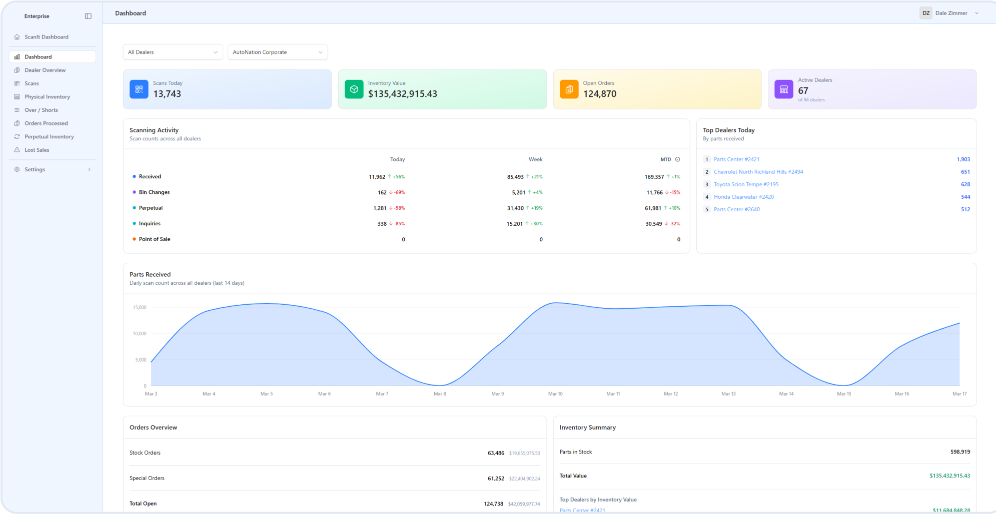
KPI	Shows	Compared To
Today's Activity	Total scans across all dealers today	vs Yesterday
This Week	Weekly scan totals	vs Last Week
Month to Date	Monthly totals	vs Last Month
Top Dealers	Leaderboard ranking dealers by scan count	Current period

Each KPI card shows whether the current period is up or down versus the last period. Green arrows mean things went up. Red arrows mean they went down.

Top Dealers Leaderboard

The Top Dealers section ranks your most active dealers by scan count. Use this to:

- Spot your top performers
- Push adoption at locations that are falling behind
- Track usage trends across your group



2.2 Charts

Below the KPI cards, charts show trends over time. You can change the time range to view different periods.

- **Activity by Scan Type:** A chart showing the volume of each scan type (Receive, Bin Change, Pick, Pack, etc.) over time. This helps you see which tasks drive the most activity and how the mix changes day to day or week to week.
- **Dealer Comparisons:** Side-by-side views of scan activity across dealers. Makes it easy to spot which locations are most active.

Charts are interactive. Hover over data points to see exact values and times. Use the time range picker to switch between daily, weekly, and monthly views.

2.3 Activity Tables

The lower part of the dashboard has activity tables. These show what is happening across your locations right now. The tables include these columns:

Column	What It Shows
Dealer	The dealership name
Scan Type	The type of scan (Receive, Pick, Pack, etc.)
User	The person who did the scan
Scans	Number of scans done
Pieces	Number of pieces handled
Time Period	When the activity took place

You can sort any column, search by dealer or user name, and filter by scan type. The tables break down activity by scan type, by user, and by time period.

> **Tip:** Use the activity tables to find the most active scanners at each dealer. This data helps with training reviews and spotting top performers.

2.4 Conditional Dashboard Sections

The dashboard shows extra sections based on what features your dealers use. These sections only appear when there is data to show.

Lost Sales Section

When dealers track lost sales, the dashboard shows a Lost Sales summary with:

- Total lost revenue across all dealers
- A breakdown by dealer showing which locations lose the most
- Trend arrows showing if lost sales are going up or down

This gives you a quick look at how much revenue your group is losing to stockouts.

PickIt Metrics Section

When dealers use PickIt for order picking, the dashboard shows PickIt stats:

Metric	What It Shows
Orders Picked	Total orders picked per day, week, and month across all dealers
Average Pick Time	How long it takes to finish a pick order on average
Pick Accuracy Rate	Percent of picks done without errors (wrong part, wrong count)
Fulfillment Completion Rate	Percent of orders fully filled vs partly filled or unfilled
Top Pickers	Leaderboard of the fastest and most accurate pickers across your group

> **Note:** The Lost Sales and PickIt sections only show up if at least one dealer in your group is using those features. If you do not see these sections, there is no data to display.

3. Report Modules

Enterprise has seven report modules. Each one covers a specific part of your parts department work. All reports share these features:

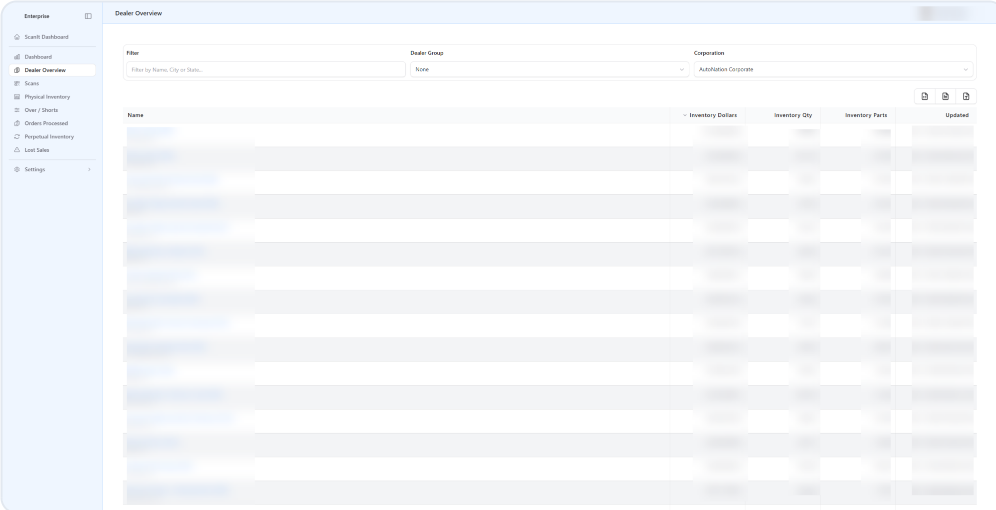
- Sortable columns
- Text search
- Pagination
- Dealer group filtering
- PDF and Excel export

3.1 Dealer Overview

The Dealer Overview page shows all dealers in your group with key inventory numbers side by side.

Column	What It Shows
Dealer Name	The dealership name
Inventory $	Total inventory value in dollars
Inventory Qty	Total number of parts in inventory
Part Count	Number of unique part numbers in stock
Last Activity	When this dealer last did a scan (in their local time zone)

> **Tip:** Click any column header to sort the table. Click again to flip the sort order. This lets you quickly find the dealer with the highest or lowest inventory value.



3.2 Scan Activity

The Scans page breaks down scan activity by dealer and scan type. Use it to see which dealers are using their scanners and what tasks they are doing.

The report tracks 11 scan types:

Scan Type	What It Is
Receive	Parts received from shipments
Bin Change	Parts moved between bin locations
Perpetual	Cycle counting scans
Part Inquiry	Part info lookups
Part List	Part list tasks
Pick	PickIt order picking scans
Pack	PackIt container packing scans
Add Lookup	New part lookups added
Point of Sale	Counter sale scans
Returns	Parts return scans
Delivery	Delivery confirmation scans

Each scan type column shows both the number of scans and the number of pieces handled.

3.3 Physical Inventory

The Physical Inventory page shows count results across all dealers. Use it during PI season to track which dealers have finished their counts and review accuracy.

3.4 Over/Shorts

"Overs" are parts received in excess of what was ordered. "Shorts" are parts received less than ordered.

Each dealer row can be expanded to show a per-store breakdown. This lets you see exactly which stores have the most gaps.

> **Important:** High over/short counts can point to receiving errors, supplier issues, or scanning mistakes. Use this report to find dealers that may need more training on receiving.

3.5 Orders Processed

The Orders Processed page shows order finish rates per dealer. Use it to see how fast each location handles their incoming orders and spot any slowdowns.

3.6 Cycle Counting (Perpetual Inventory)

The Cycle Counting page tracks counting progress across all dealers. Color-coded badges make it easy to see who is on track:

Badge Color	Meaning
Green	On track - counting schedule is current
Yellow	Behind schedule - needs to catch up
Red	Far behind - needs attention right away

3.7 Lost Sales

The Lost Sales page tracks revenue lost to stockouts across every location. When a customer needs a part and it is not in stock, that is a lost sale. This report shows how much money each dealer is leaving on the table.

A totals row at the bottom shows the combined lost sales across all dealers (or the current dealer group filter).

> **Tip:** Use the Lost Sales report to build a case for better stocking. The dollar amounts speak for themselves when showing results to management.

4. Dealer Groups

Dealer Groups let you create custom subsets of dealers for focused views. Instead of seeing all 50 dealers at once, you can make a group for just your 8 Southeast locations, your Honda stores, or your top performers.

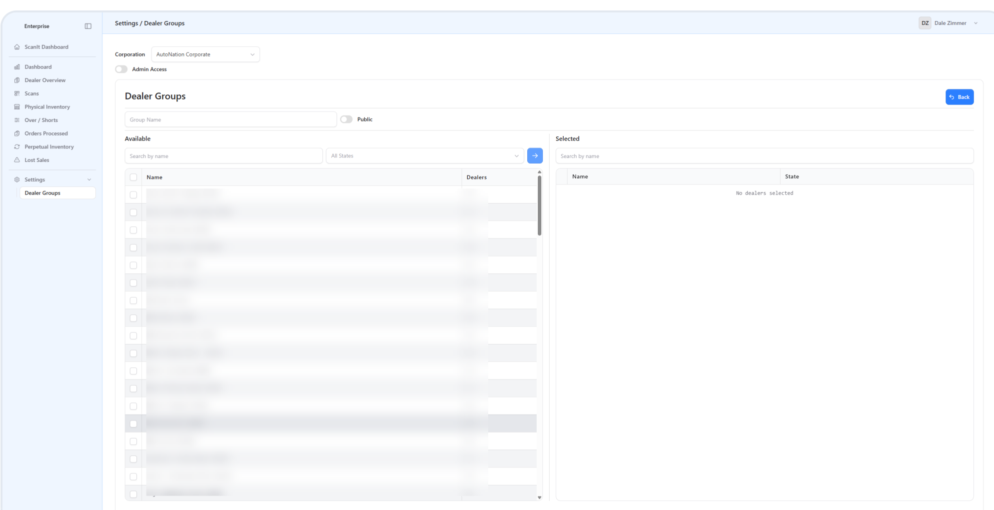
4.1 Creating Dealer Groups

To create a new dealer group:

1. Click **Settings** in the sidebar
2. Click **Dealer Groups**
3. Click the **Create Group** button
4. Type a name for your group (e.g., "Southeast Region" or "Honda Dealers")
5. Choose whether the group is **Public** or **Private**
6. Use the dealer picker to add dealers to the group:

- Search by dealer name in the left pane
- Filter by state to narrow the list
- Click a dealer to move it to the right pane (selected)
- Click a selected dealer to remove it

7. Click **Save** to create the group



4.2 Using Groups as Filters

Once you create a dealer group, it shows up as a filter on every report page. Look for the **Dealer Group** dropdown at the top of any report.

1. Go to any report page (Dashboard, Scans, Lost Sales, etc.)
2. Find the **Dealer Group** dropdown at the top
3. Pick your group from the dropdown
4. The report filters right away to show only dealers in that group

Tip: The dealer group filter is saved in the URL. You can bookmark a filtered view or share the URL with others so they see the same filtered data.

4.3 Public vs Private Groups

Group Type	Who Can See It	Best For
Public	All Enterprise users in your group	Standard regional groups, brand groups, or other groupings everyone needs
Private	Only the person who made it	Personal views, temp groups, or test groupings

Note: A dealer group must have at least one dealer to show in the filter dropdown. Empty groups are hidden.

5. Common Features

Every report page in Enterprise shares these features:

5.1 Sorting & Searching

Sorting: Click any column header to sort by that column. Click again to flip the order (A-Z / Z-A). The sorted column is highlighted.

Searching: Use the search box at the top of any table to filter rows. Type a dealer name or any text, and the table filters right away to show only matching rows.

Pagination: Large result sets are split into pages. Use the page buttons at the bottom to move between pages.

5.2 Exporting Reports

Every report page can be exported in two formats:

Format	Best For	How to Export
PDF	Printing, email, presentations	Click the PDF export button at the top of the report
Excel	Further analysis, custom charts, data work	Click the Excel export button at the top of the report

Exports include all data shown in the report. If you have a dealer group selected, the export will only contain data for those dealers.

> **Tip:** Use Excel exports when you need to make custom charts or dig deeper into the data. Use PDF exports for sharing with people who just need to read the report.

5.3 Corporation Selector (Admins Only)

IPS admins see an extra dropdown in the nav bar. This lets admins switch between different groups to view their data.

> **Admin Feature:** Regular Enterprise users will not see this dropdown. Your data is scoped to your group. Only IPS internal admins can switch between groups.

6. Frequently Asked Questions

Q: How often does the data update?

The Executive Dashboard refreshes every 60 seconds with a 2-minute cache. Other report pages show live data each time you open them or refresh the page.

Q: Can I see data for just some of my dealers?

Yes! Create a Dealer Group with the dealers you want. Then pick that group from the Dealer Group dropdown on any report page. See Section 4 for details.

Q: What scan types are tracked?

Enterprise tracks 11 scan types: Receive, Bin Change, Perpetual, Part Inquiry, Part List, Pick, Pack, Add Lookup, Point of Sale, Returns, and Delivery.

Q: Can I share reports with people who do not have Enterprise access?

Yes. Export any report to PDF or Excel and share the file. The export includes all data shown in the report.

Q: Why do I not see certain sections on the Dashboard?

The Dashboard only shows Lost Sales and PickIt Metrics when there is data for them. If none of your dealers track lost sales or use PickIt, those sections will not appear. See Section 2.4 for details.

Q: How do I get Enterprise access?

Contact your IPS admin or IPS support. Enterprise access requires the "enterprise" role on your user account.

Q: What browsers are supported?

Enterprise works in all modern browsers: Chrome, Edge, Firefox, and Safari. We suggest using the latest version for the best results.

Q: Can I use Enterprise on my phone?

Yes. Enterprise is responsive and works on tablets and phones. However, it works best on a desktop or laptop where you can see full tables without scrolling side to side.

Q: Who do I contact for support?

Contact IPS support:

- Phone: 810-695-9332
- Email: support@scanitparts.com

You can also find help through the ScanIt Parts Academy, downloadable PDF guides, and video tutorials at **scanitparts.com/pages/support.html**.