



EPASS Reports & Dashboards

General overview of EPASS Reports &
preview of Dashboards!



EPASS Reports Overview

Live demonstration of EPASS Reports

- Navigation
- Running a Report
- Bookmarks (save parameters)
- Scheduling
- Distribution
- Email
- Bursting
- Favorites
- History
- Search
- Admin Section

[Access the online help content for this topic](#)

EPASS
SOFTWARE

User Conference 2025

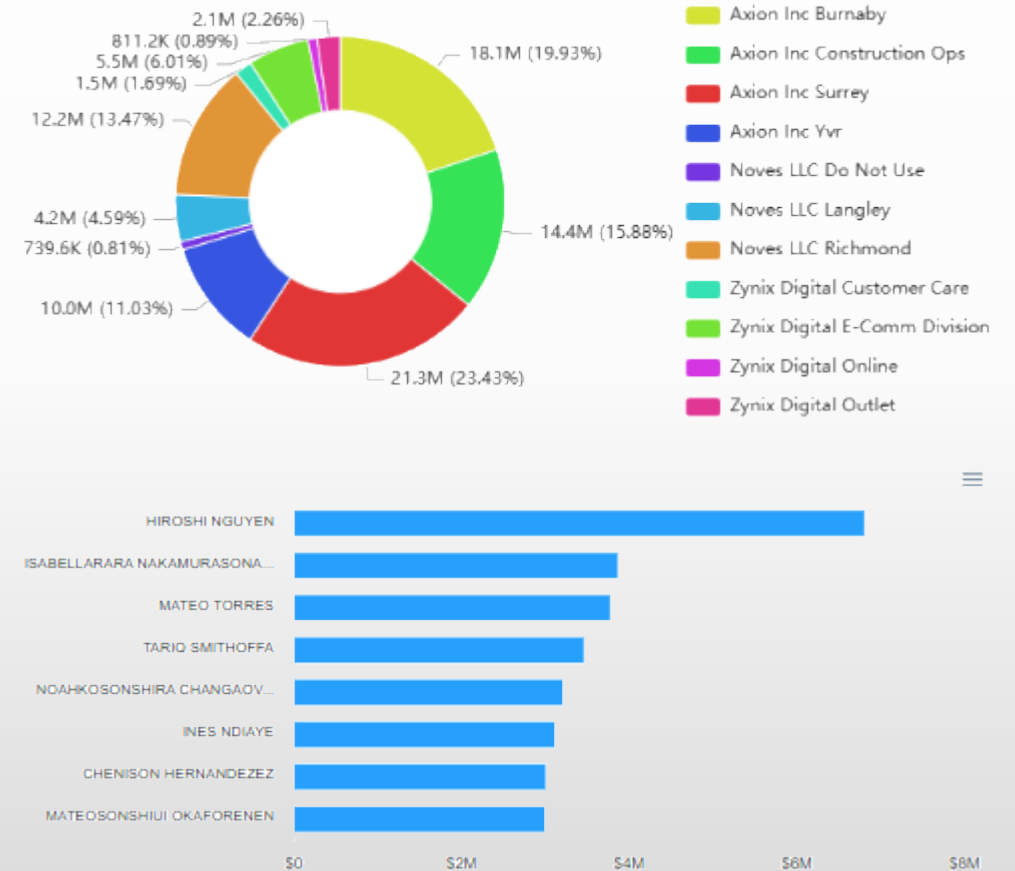
Wednesday, October 22nd — Friday, October 24th
Pan Pacific Hotel • Vancouver, B.C. Canada





EPASS Dashboards

Power your Insight - Storefront to Service Bay

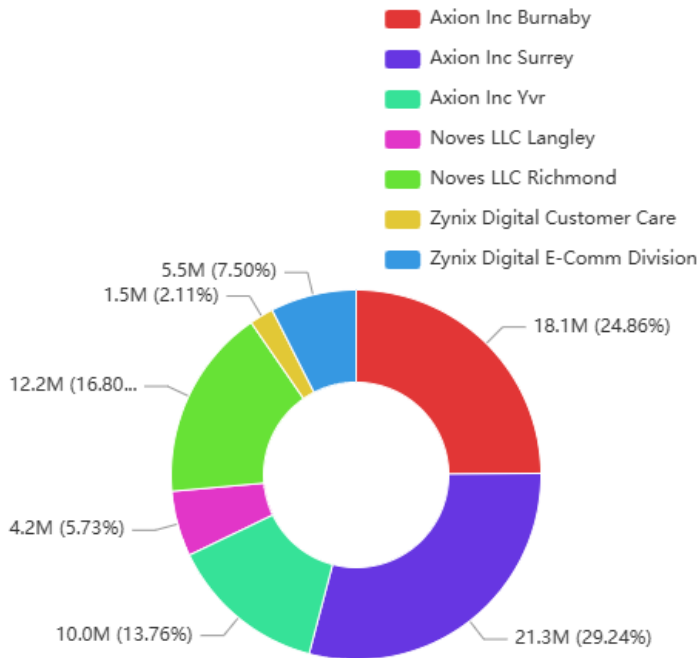
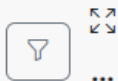


EPASS Dashboards

Branch Manager Dashboard

☐ Default

Burnaby, Surrey, Langley Branch Shipped Sales



All Branch YTD Shipped Sales



91.55M

Year-to-Date Sales

YTD Burnaby, Surrey, Langley Shipped Sales



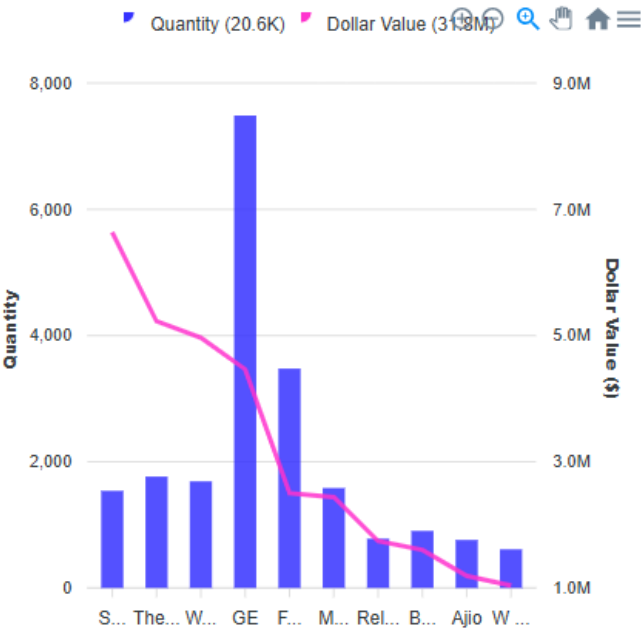
40.43M

Year-to-Date Sales

QOH by Brand

Top N:

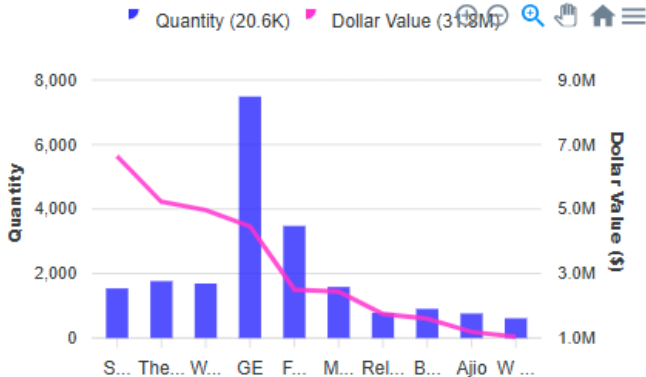
All



QOH by Appliances

Top N:

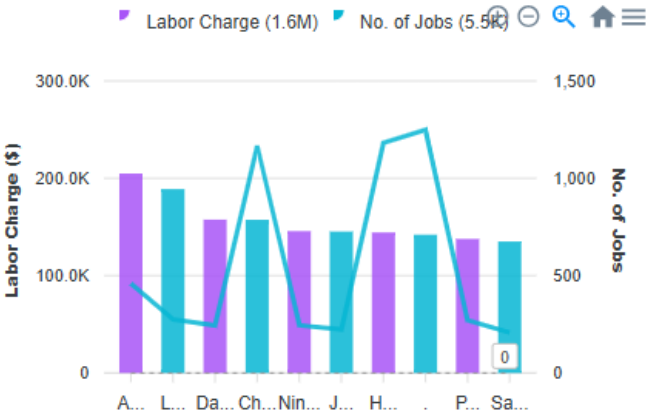
All



Labor vs Jobs

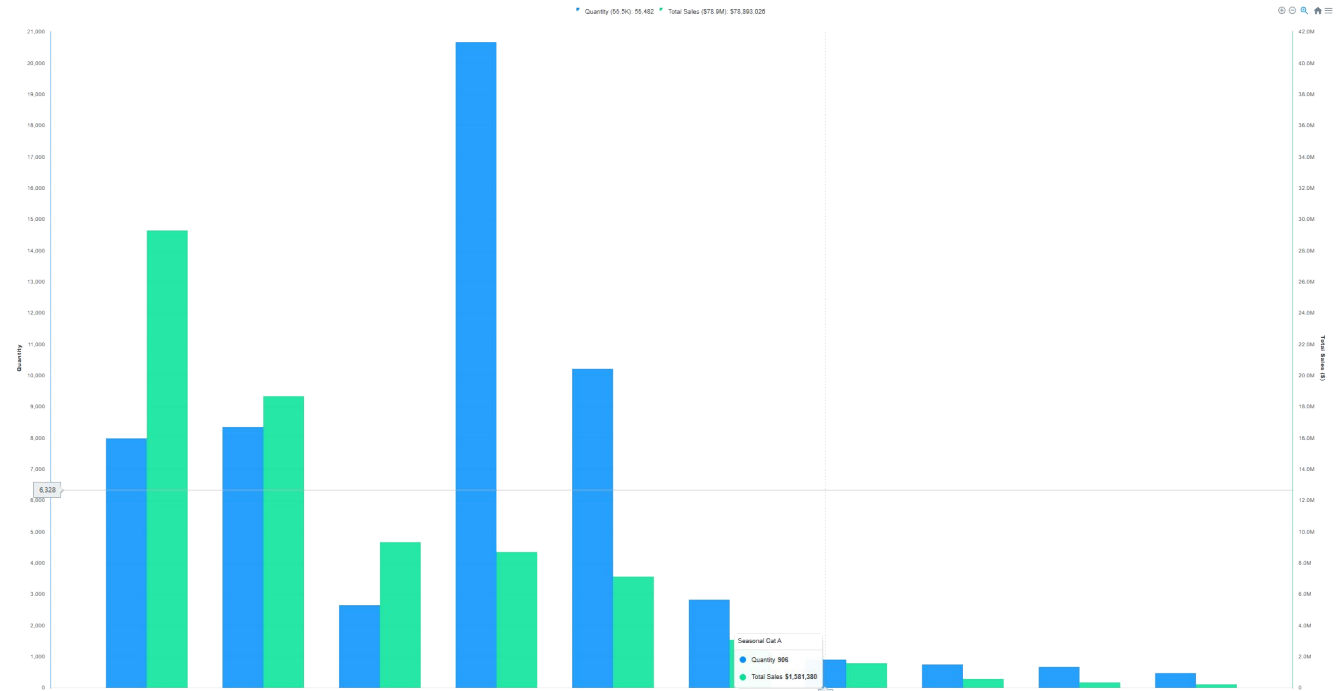
Top N:

All



EPASS Dashboards

- Create custom dashboards
- Assign dashboards to users/groups
- Choose from a gallery of widgets covering various functional areas like Sales, Shipping, Service etc.



EPASS
SOFTWARE

User Conference 2025

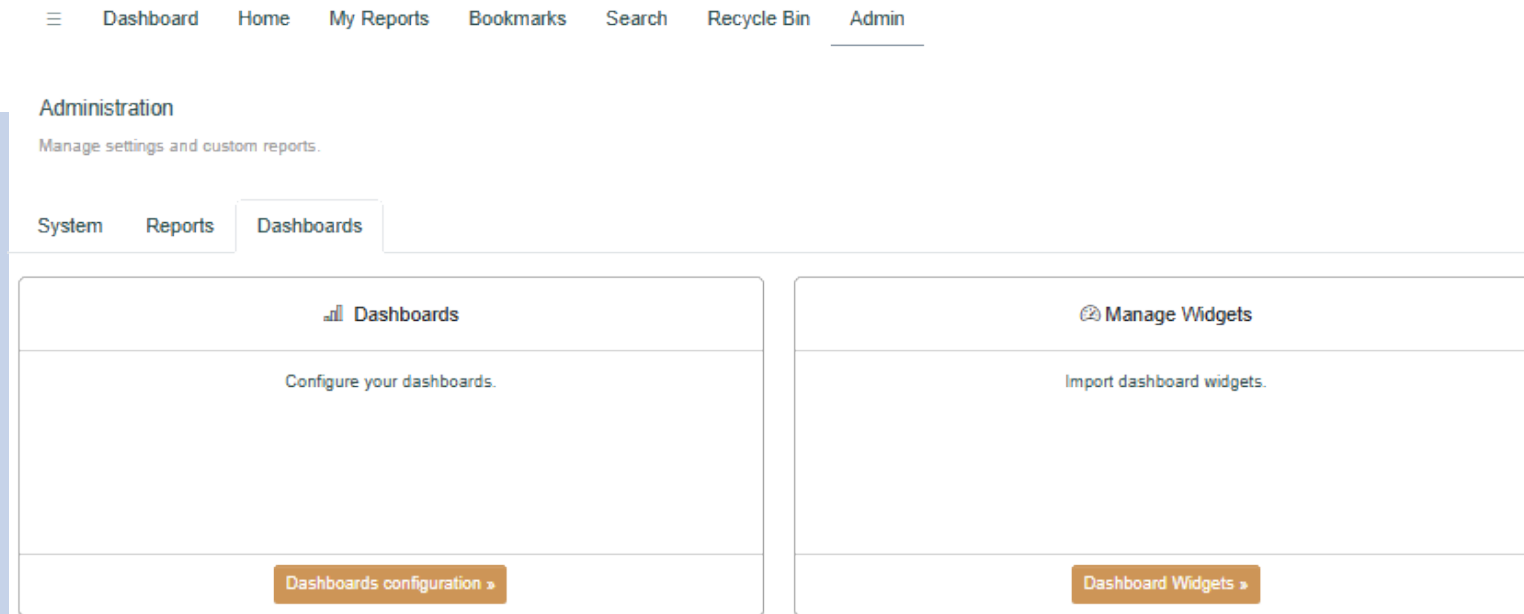
Wednesday, October 22nd — Friday, October 24th
Pan Pacific Hotel • Vancouver, B.C. Canada



EPASS Dashboards

Admin Dashboard Settings

- New Admin section for Dashboards
- Authorization - Security Options



The screenshot displays the EPASS Admin Dashboard Settings interface. At the top, a navigation bar includes links for Dashboard, Home, My Reports, Bookmarks, Search, Recycle Bin, and Admin. Below this, the 'Administration' section is active, with a sub-header 'Manage settings and custom reports.' and tabs for System, Reports, and Dashboards. The 'Dashboards' tab is selected, showing two main panels: 'Dashboards' and 'Manage Widgets'. The 'Dashboards' panel contains the text 'Configure your dashboards.' and a button labeled 'Dashboards configuration »'. The 'Manage Widgets' panel contains the text 'Import dashboard widgets.' and a button labeled 'Dashboard Widgets »'.

Navigation: Dashboard Home My Reports Bookmarks Search Recycle Bin Admin

Administration
Manage settings and custom reports.

System Reports Dashboards

Dashboards
Configure your dashboards.
Dashboards configuration »

Manage Widgets
Import dashboard widgets.
Dashboard Widgets »



EPASS Dashboards

ADMIN - Manage Widgets

- Automatically load widgets into EPASS Reports
- Enable/Disable widgets
- Actions controlled via security options

[Administration](#) / [Dashboards](#) / [Dashboard Widgets](#)

Available Widgets

Widgets

	Frequently Used Reports Most Frequently Used Reports by user	<input checked="" type="checkbox"/>
	Reports Pending Download Reports generated, but not yet downloaded	<input checked="" type="checkbox"/>
	Reports Usage Distribution Report usage trends over time period	<input checked="" type="checkbox"/>
	Upcoming Scheduled Reports Upcoming Scheduled over time period	<input checked="" type="checkbox"/>
	Finished Invoices by Sales Referral Finished Invoices By Sales Referral	<input type="checkbox"/>
	Invoices by Start Date Multi-series line by invoice type across months	<input checked="" type="checkbox"/>
	On Hand by Product Serial Inventory On Hand by Product	<input checked="" type="checkbox"/>
	On Hand by Brand Serial Inventory On Hand by Brand	<input checked="" type="checkbox"/>
	Shipped by Branch Shipped Invoices By Branch	<input checked="" type="checkbox"/>
	Shipped by Brand Shipped Invoices By Brand	<input checked="" type="checkbox"/>
	Shipped by InvoiceTypes Shipped Invoices By InvoiceTypes	<input checked="" type="checkbox"/>
	Shipped by Product Shipped Invoices By Product	<input checked="" type="checkbox"/>
	Shipped by Product Major Shipped Invoices By Product Major	<input checked="" type="checkbox"/>
	Shipped by Product Minor Shipped Invoices By Product Minor	<input checked="" type="checkbox"/>
	Shipped by Salesperson	<input checked="" type="checkbox"/>

EPASS
SOFTWARE

User Conference 2025

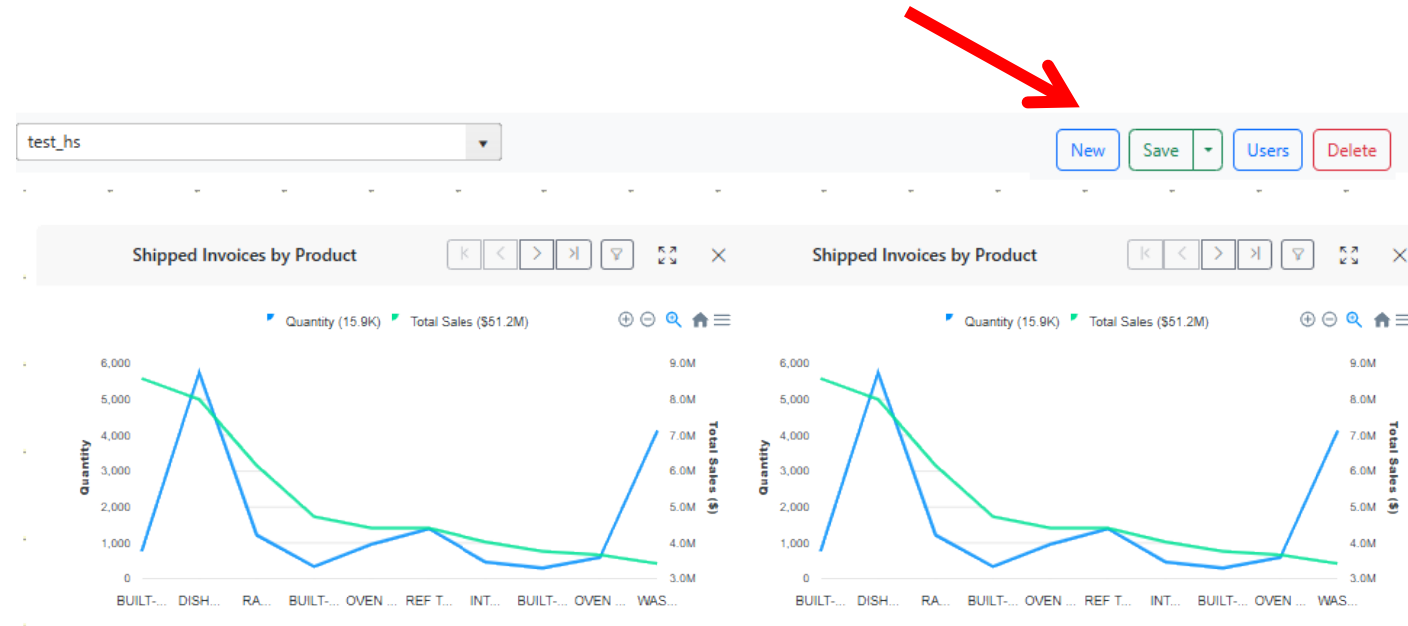
Wednesday, October 22nd — Friday, October 24th
Pan Pacific Hotel • Vancouver, B.C. Canada



EPASS Dashboards

ADMIN - Add, Copy, Assign, Delete Dashboards

- Add a new dashboard
- Drag/Drop widgets from widgets pane into dashboard
- Copy an existing dashboard
- Assign a dashboard
- Delete a dashboard
- Rename widgets
- Functions controlled by security options



EPASS
SOFTWARE

User Conference 2025

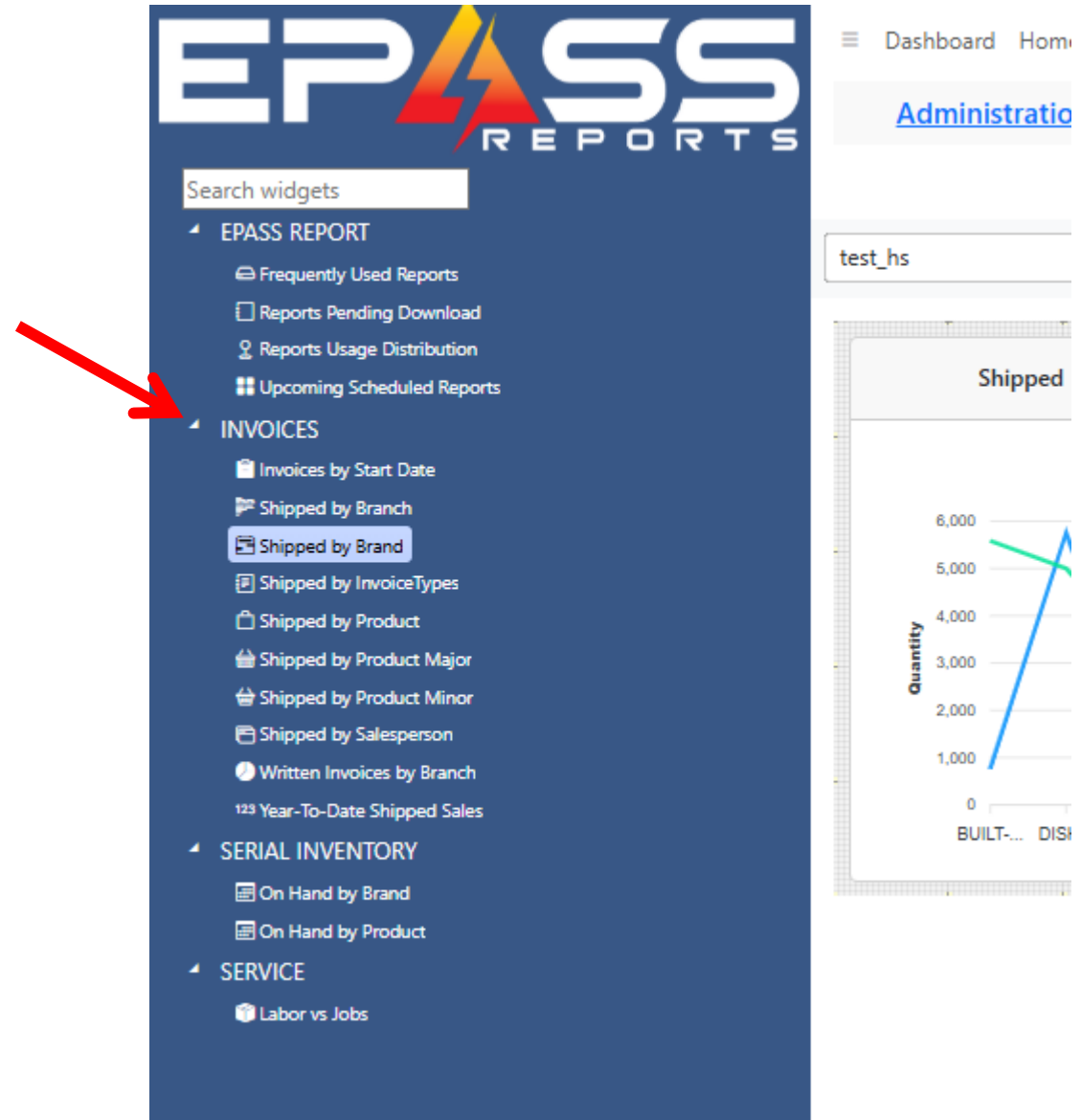
Wednesday, October 22nd — Friday, October 24th
Pan Pacific Hotel • Vancouver, B.C. Canada



EPASS Dashboards

ADMIN - Widget Groups

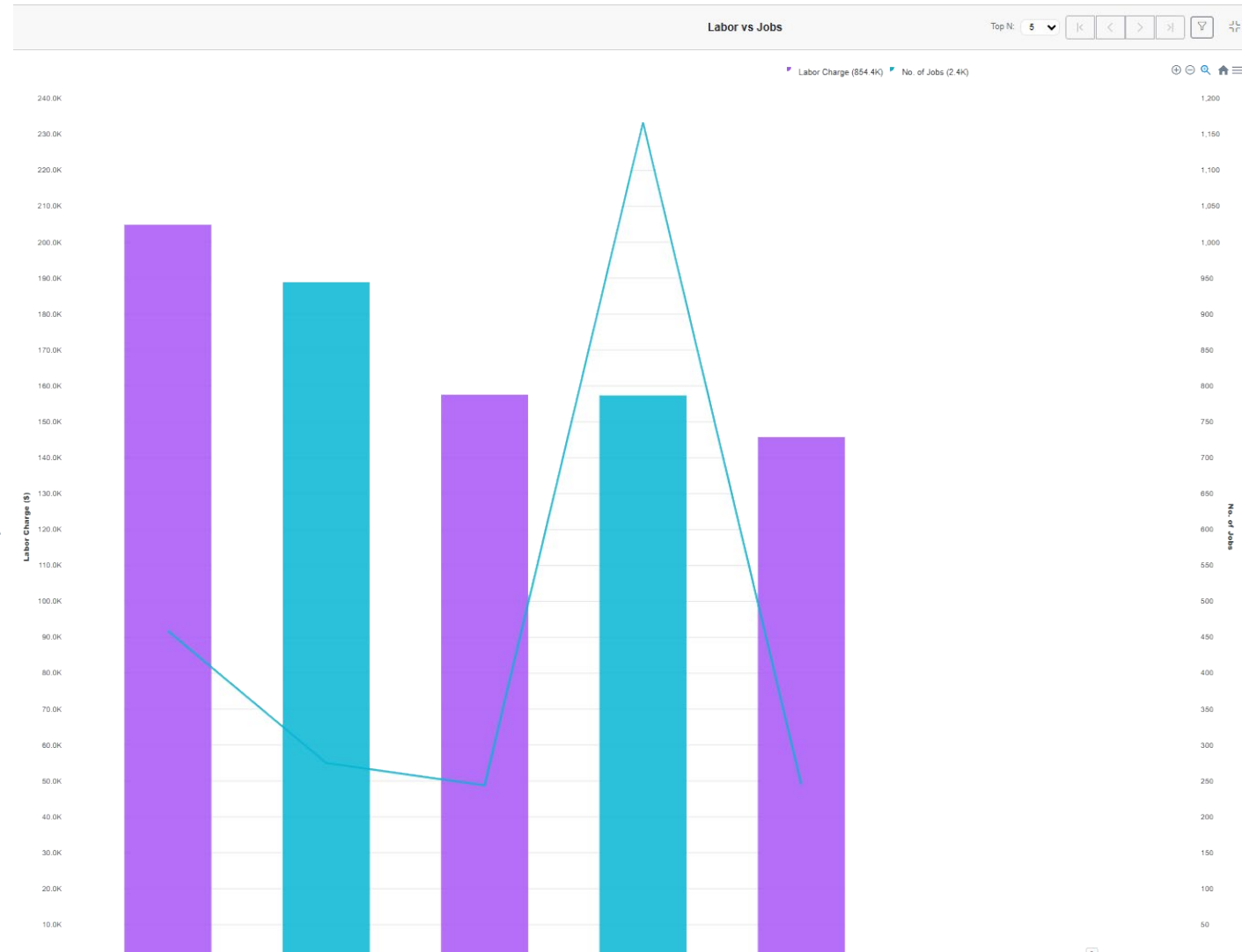
- Widget Group – a combined pool of related widgets
- Each widget group has security option
- Can see only available widget groups



EPASS Dashboards

Using Dashboards

- Redirected to default dashboard at login
- Apply custom filter on widget
- Limit viewed data by Top N filter
- Zoom widget to Full screen
- Export data to Excel or picture format



EPASS
SOFTWARE

User Conference 2025

Wednesday, October 22nd — Friday, October 24th
Pan Pacific Hotel • Vancouver, B.C. Canada



EPASS (Crystal) Reports

Questions?

EPASS
SOFTWARE

User Conference 2025

Wednesday, October 22nd — Friday, October 24th
Pan Pacific Hotel • Vancouver, B.C. Canada

