ALLORNOTHINGHQ

Receiving Performance Dashboard

Setup guide: load your data, read the dashboard, and keep it clean.

General template written from scratch. Names no software product. Not legal, contract or safety advice. Not tied to any employer or company.

What this is

The Receiving Performance Dashboard turns two simple logs into answers: one row per truck, and one row per damage event. Type a year (and a month if you like) and it shows loads, pallets, cases, unload time, damage rate, a month-by-month trend, and views by receiver, shift, weekday, pallet type, damage type and vendor.

What is in your download

- **Receiving Performance Dashboard (Excel).** The blank workbook for your data. Works in Microsoft Excel and Google Sheets.
- **Receiving Performance Dashboard DEMO (Excel).** The same workbook filled with **synthetic** data made up for this product, so you can see every sheet working. Nothing in it comes from a real operation.
- **This setup guide (PDF).**
- **Start Here (PDF)** with the license and a quick start.

The sheets

Sheet	What it does
Settings	Your site name and the lists: shifts, receivers, names of up to four pallet types, damage types, dispositions, carriers and doors.
Data	One row per truck. Total pallets and unload minutes calculate. 3,000 rows.
Damage	One row per damage event with PO, vendor, item number, cases damaged and type. Description looks up from Items. 1,000 rows.
Items	Your item list: number, description, category, unit. 2,000 rows.
Dashboard	Totals, pallets by type, damage, a monthly table and three charts, and tables by receiver, shift, weekday and damage type.
Vendors	Scorecard for the first 40 vendors: loads, pallets, cases, damage, damage rate, average unload time and rank.

Colors. White cells are for you to fill in. Grey cells are calculated, so do not type over them. If you see zeros when you first open a downloaded file, click **Enable Editing** so Excel can calculate.

Step 1: Settings

1. Open the **Settings** sheet. Type your site name.
2. Edit the lists on the right. Type each shift, receiver, damage type, carrier and door as you want it to appear.
3. Name your pallet types in the **Pallet types** list (up to four). The names become column headings on **Data** and rows on the **Dashboard**. Leave a type blank if you do not use it.
4. Use the same spelling everywhere. The dashboard counts a receiver, vendor or damage type only when the text matches exactly.

> **Tip.** Keep lists short and consistent. “Receiver A” and “receiver a” are the same to Excel, but “Receiver A” and “Receiver A” (two spaces) are not.

Step 2: Load your data

Each row on **Data** is one truck. The white columns are:

Column	What to enter
Date	The receiving date. It must be a real date, not text.
Shift, Carrier, Receiver, Door	Pick from the drop-down lists, or paste text that matches your lists.
PO number, Vendor	Free text. Use one spelling per vendor so the Vendors sheet can group them.
Arrival, Start unload, Finish unload	Times such as 7:30 AM. A finish time after midnight is handled.
Pallets (four types)	Number of pallets of each type. Leave blank when none.
Cases	Total cases received on the truck.

Pasting rows from your own logs

1. Put your data in the same column order as the white columns.
2. Copy only the data rows (not the headings). In the **Data** sheet, click cell A2 and use **Paste Values** so you keep the sheet's formatting and formulas.
3. Do not paste into the grey columns Q, R and S.
4. Check a few rows: dates should be right-aligned (real dates). If they are left-aligned they are text; convert them with Data, Text to Columns, Date.
5. Open **Dashboard**, type the year, and check that the totals look like what you expect.