Smartview

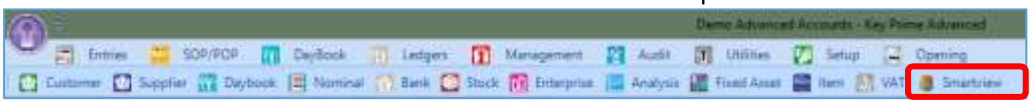
Smartview provides users of KEYPrime Accounts and Property the option to view certain reports in a graphical format. The basic version of Smartview is included by default in all versions of KEYPrime. A chargeable module will be available from Autumn 2020 which allows the user to filter the results and create much more specific graphs.

Smartview for KEYPrime Accounts

In KEYPrime Accounts, Smartview shows a graphical representation of the Cashflow which provides a comparison to the master budget and overdraft for a specific date range. There are also the Debtors and Creditors Smartviews which provide a summary of the overall debt and credit at a specified date for all customers and suppliers.

Cashflow Smartview

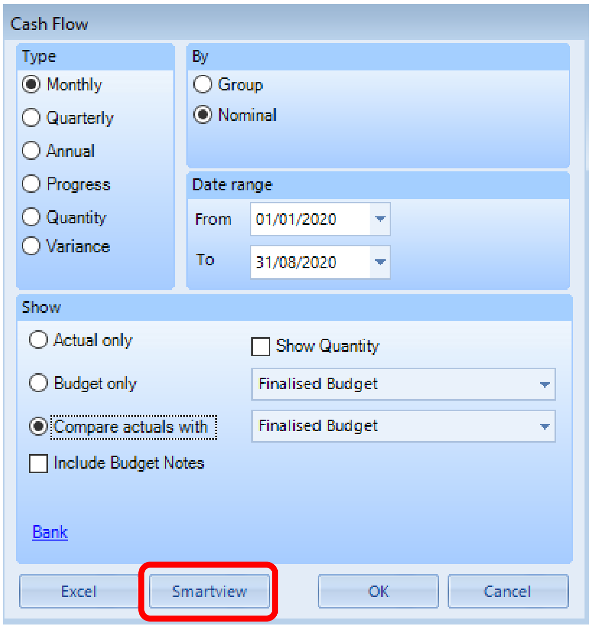
The Cashflow Smartview icon can be found on the top toolbar:



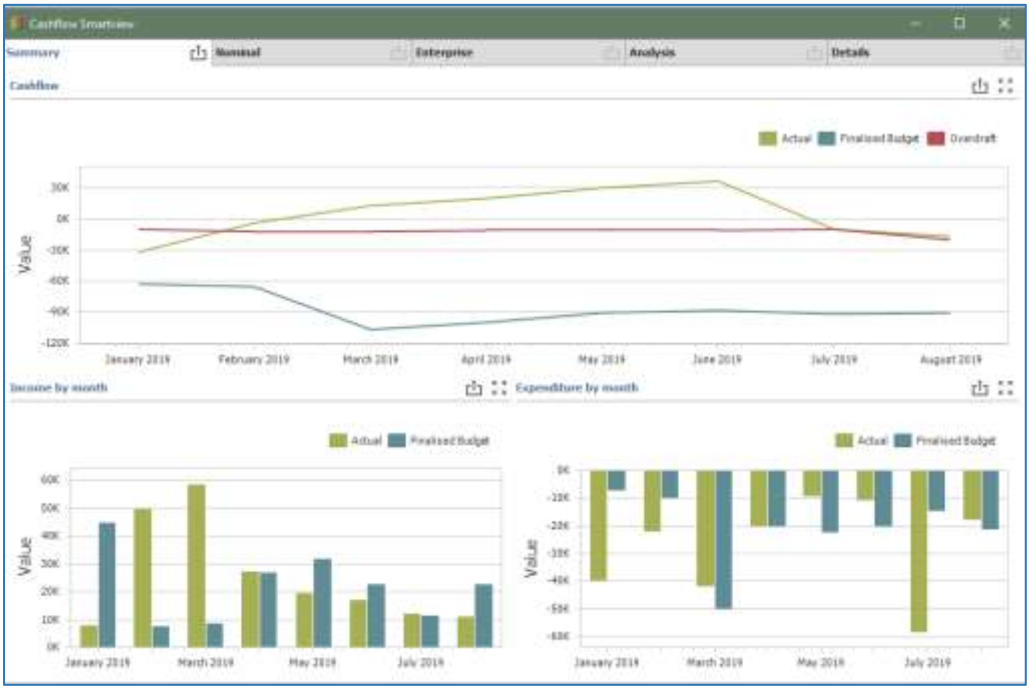
When run from the top toolbar icon the Cashflow Smartview will default to show the cashflow from the start of the current financial year to the current month.

It is also found in the Management, Cashflow criteria screen and is live when using any of the Monthly reports.

When run from the management, cashflow criteria screen it uses the dates set in the form.

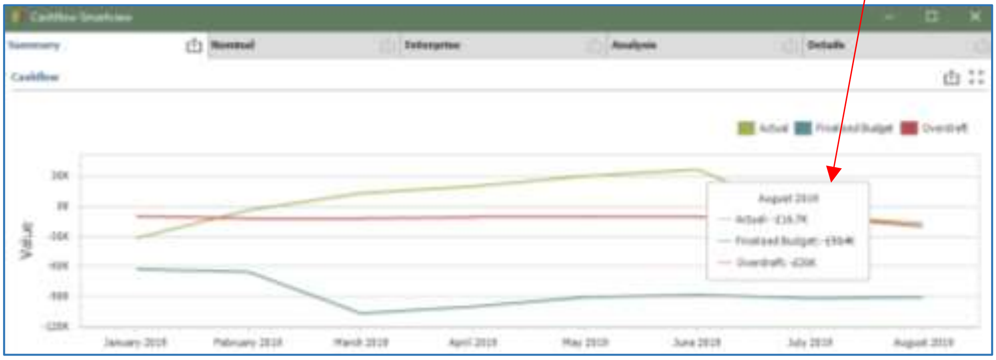


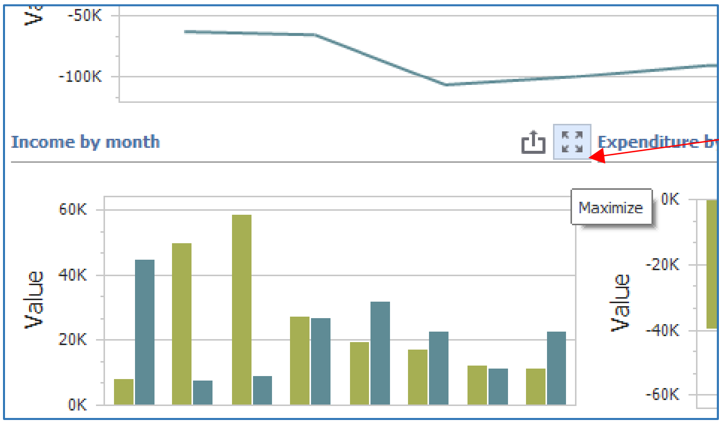
Cashflow Smartview defaults to the Summary screen when first opened:



The top graph shows the overall monthly cashflow, budget and overdraft. The 2 lower graphs show Income by month and Expenditure by month, compared to budget. The screen can be resized to view more detail.

If you hover the mouse over any part of any of the graphs it will display the values at that point.

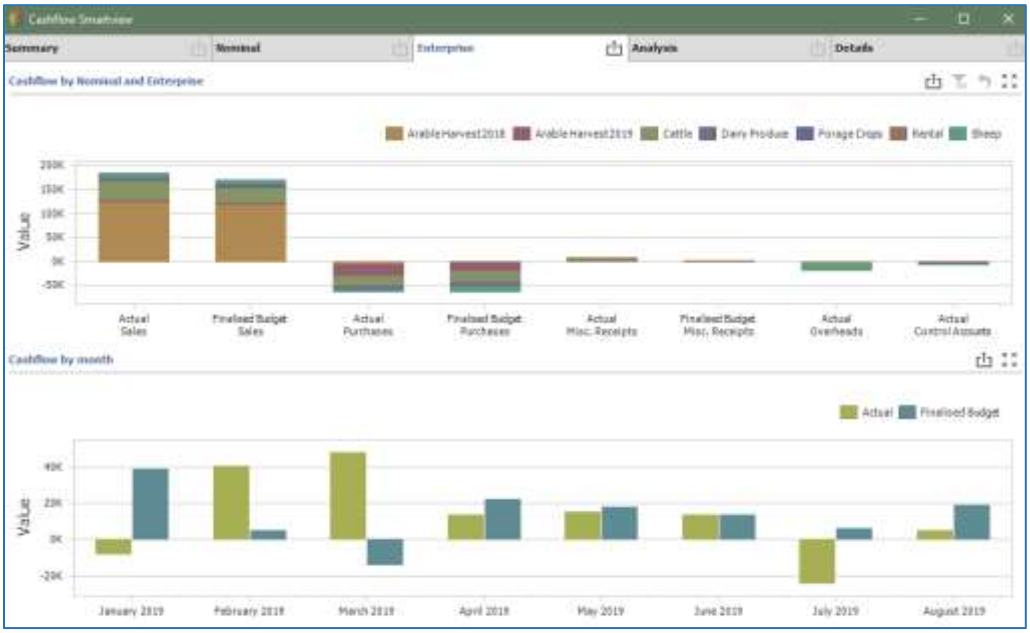




Each graph can be Maximized using the 4 arrow icon in the top right corner of the graph.

The icon allows you to export the graph to:
Print Preview
PDF
Image
or Excel.

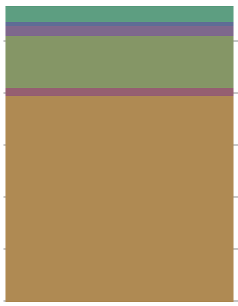
There are 3 tabs at the top of the screen which allow the information to be presented in Nominal Groups, by Nominal, by Enterprise or by Analysis code. In the Nominal screen the top graph shows the cashflow for each nominal group and the bottom graph show the same information monthly compared to budget.
In the Enterprise and Analysis tabs the top graph shows the cashflow by nominal groups but this is split up into the individual enterprise or analysis codes.

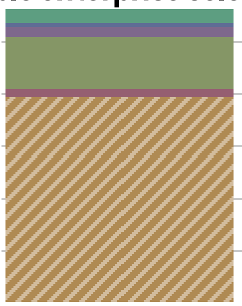


Again, if you hover the mouse over any section of the graph it will display the actual or budget figures.

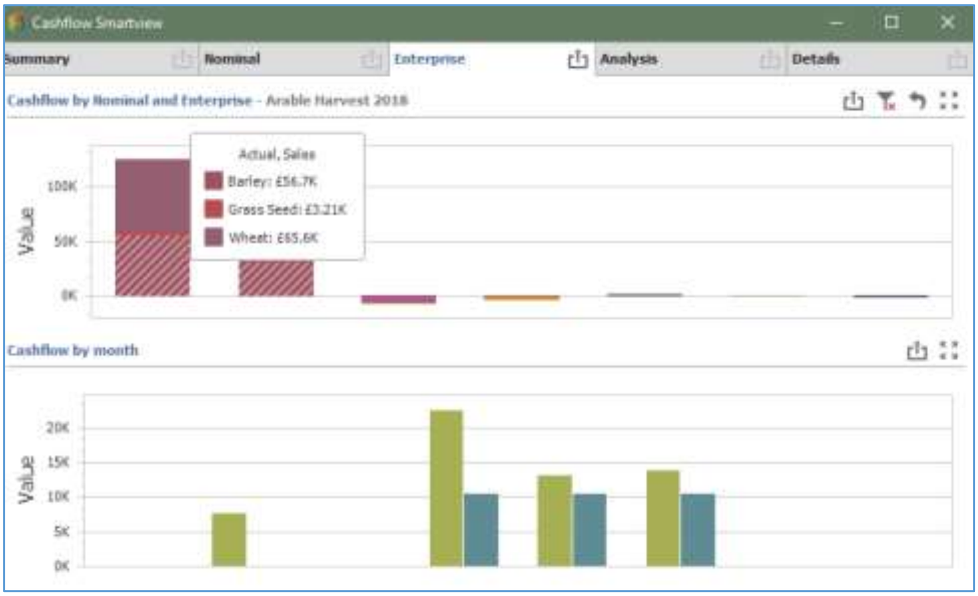
If you click on any specific code area of the top graph the bottom graph will change to present the monthly figures for just that Nominal Group, Enterprise or Analysis code. The code that has been selected will display as hatched so you know which one is being shown on the bottom graph.

No enterprise selected **Arable enterprise selected**





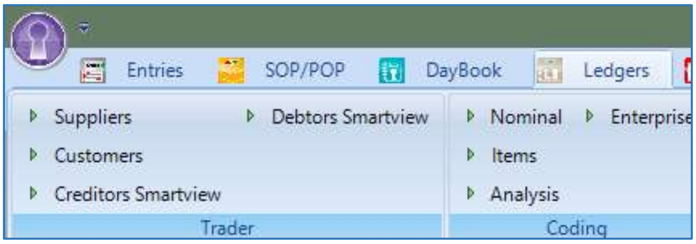
To further drill down e.g. on a specific enterprise, double click on the section required and that will change the top graph to show the nominals attached to the enterprise - see illustration below. Again, if you click on one of the nominals in the top graph the area shown will change to hatched and the bottom graph will just show values for that nominal and enterprise combination.



To return to the previous graph press the Up arrow in the top right of the screen and to clear any filtering from the display, click on .

Debtors and Creditors Smartview

The Debtors and Creditors Smartview are accessed from the Trader Ledger menu:



Enter the date the required and select OK.

The left hand section allows you to filter by the Age of Debt or Age of Credit periods or to keep them all. The first graph displays the amount for each period and is colour coded by Trader. Hover over a section to show the names and actual values for that period.

The right hand chart lists the individual traders and shows their values which are colour coded by period. If you click on one of the traders in the left hand graph this will filter the right hand graph to show only the selected trader.

Further tabs allow you to present the information by Enterprise or Analysis code. Also, in KEYPrime Advanced there is the option to present it by Trader Type and Trader Group.

Smartview in KEYPrime Property

In KEYPrime Property the Smartview button is situated on the top toolbar of the Properties listing screen. This gives the option to view the results of the Property Voids report and the Time to Collect Rent report as graphs. Please note, you should double check the values in the main reports before making any business decisions from them.

There are 2 Smartview reports in the Properties section of KEYPrime Property. These are graphical representations of the Property Voids report and the Time to collect rent report.

Property Voids

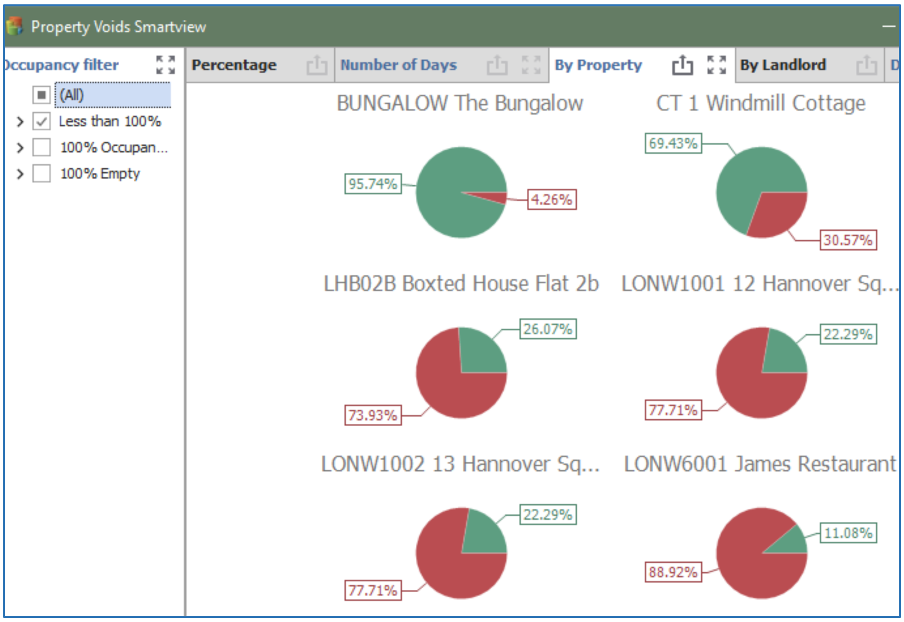
This report is run for a specified date range and defaults to showing the Percentage of that time period that the property was occupied or empty.

The bar chart on the left shows the Total of all properties and the individual properties show on the right. Hover the cursor over any of the bars to show the values.

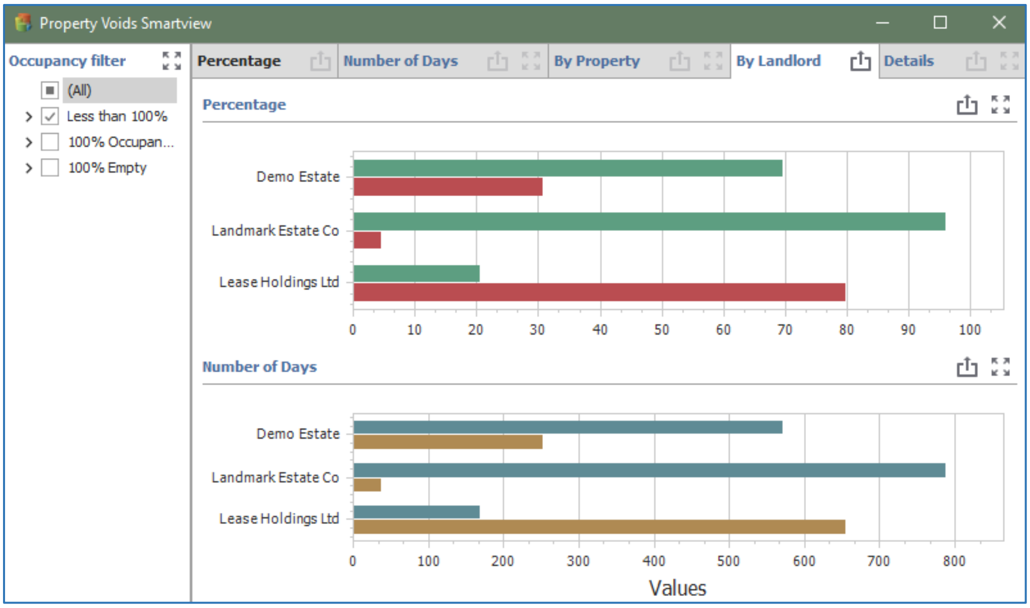
The tick boxes on the left hand side allow you to filter out some of the properties e.g. to exclude those with 100% occupancy.

The graph of individual properties is also displayed on the second tab and the values shown are in Number of Days rather than percentage.

The By Property tab displays a pie chart for each property the percentage values:

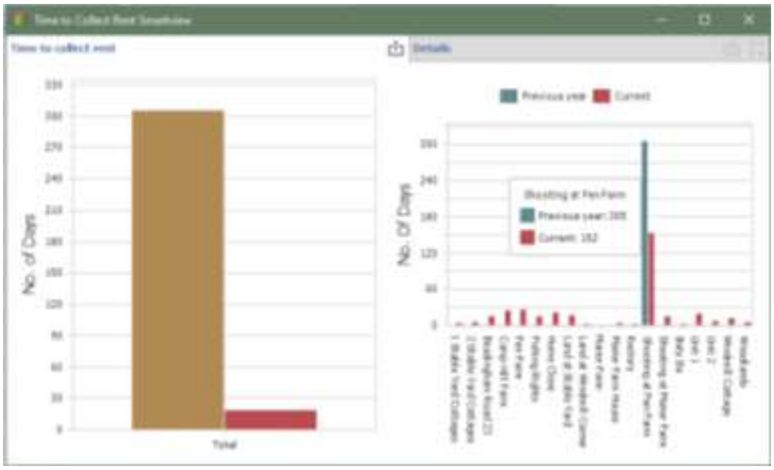


The By Landlord displays both percentage and number of days for the all or filtered properties belonging to each landlord:



Time to collect rent

This graphic has a criteria screen to filter the information before running the graph:



The graphs will display Previous and Current years in Total and by each Property.