

Sales Operational Bundle for Inform ERP

Improve customer engagement with daily actionable insights

MIT'S Distributor Analytics' Sales Operational Bundle gives your sales team the daily insights they need to better engage customers and manage their territory. This bundle makes it easy for your sales reps to see if they are on target for meeting bookings, invoicing, and gross profit goals, and to identify and prioritize the activities that will help them achieve their targets.

The Sales Operational Bundle includes three new operational scorecards (Bill To Customer, Ship To Customer, and Sales Rep) and three new supporting modules (Open Quotes, Open Orders, Bookings).*

***Bundle Requirements:** You must be on Discover 10.2.0 (or above) and have MITS standard Sales Analysis Module installed in order to use the Sales Operational Bundle. While the standard Accounts Receivable Analysis Module is not required, if you do not have it you will not see the AR sections that come with this Bundle.

KEY QUESTIONS ANSWERED

- Are my bookings and invoicing on track for the month, and how does this compare to my 12-month invoicing average?
- Which customers have the highest open quote value—and associated gross profit percentage?
- How are my big accounts doing, and which accounts do I need to be concerned about?
- How should I prioritize my calls and activities for today?

Sales Rep Operational Scorecard

Sales Rep: Delgado, William (1013)

Current Month Overview	
Booked Value:	187,030
Invoiced Value:	355,564
Invoiced Trend - Current to 12 Month Avg:	+30.9%
Projected Invoiced Value:	414,824
Invoice Trend - Projected Invoice to 12 Month Avg:	+52.7%
Profit% Current:	43.4%
Profit% Difference - Current to 12 Month:	-2.4%
Profit% Difference - Current to Last Month:	-3.8%

Last Month Overview	
Booked Value Last Month:	296,654
Invoiced Value Last Month:	136,548
Average Invoice Value Last 12 Months:	271,732
Profit% Last Month:	47.2%
Profit% Difference - Last to 12 Month:	1.4%
Profit% Last 12 Months:	45.8%

Top Open Quotes	
Delgado, William	15,174,247 38.8%
Landers, Barry	2,689,478 26.6%
Carr, Justin	2,627,828 21.9%
Doty, Mae	2,389,424 51.4%
Miller, Boris	1,876,665 33.3%
Kennedy, Robin	1,670,968 54.1%
Martin, Kami	1,497,599 38.8%
Paulsen, Landon	841,686 49.1%
Cook, Maria	721,750 57.6%
Deck, Barbara	698,612 49.6%
Sanders, Fay	160,236 52.4%

Open Orders by Bill To Customers	
Delgado, William	186,513 20 61
Joel Baker	81,138 5 38
InfoFlash	68,872 3 79
William Bell Military Aircraft	26,225 2 78
Alstroni	6,633 1 31
YourSet Tobacco	3,871 1 88
Surston	2,774 3 85
MyStation	1,527 1 12
Clintagon	359 1 4
James Barnes	236 1 18
TeleCity	143 1 10

Top Bill To Customers MTD vs Prior 12

Customer	Invoiced Sales	Invoiced Sales Trend	Profit%	Profit% Diff
Joel Baker	251,690	+382.6%	43.0%	-5.7%
InfoFlash	80,719	+1.2%	43.1%	1.3%
YourSet Tobacco	6,521	-80.8%	47.5%	-0.2%
Surston	6,516	-77.5%	46.1%	4.8%
RCK United States GP	1,907	-72.2%	51.9%	1.1%
Colos	1,689	+132.3%	51.6%	1.8%
Kenneth Rivers	1,001	+238.2%	54.9%	1.4%
Clintagon	973	-9.5%	64.1%	14.5%
RQZ	731	+719.4%	46.6%	3.5%
MyStation	617	-50.8%	30.3%	-29.7%

Top 10 Bill To Customers by Rolling 12 Sales

Customer	Invoiced Sales	Invoiced Sales Trend	Profit%	Profit% Diff
InfoFlash	956,749	+178.6%	41.8%	2.1%
Joel Baker	625,890	+41.0%	48.6%	-0.2%
YourSet Tobacco	408,509	+189.6%	47.7%	-0.8%
Surston	340,242	+64.4%	41.3%	-0.2%
Alstroni	129,507	+150.2%	39.3%	2.8%
TeleCity	98,733	+149.8%	50.4%	1.7%
RCK United States GP	82,264	+46.2%	50.8%	8.4%
RDP	50,873	+155.4%	50.3%	2.7%
CyberBit	45,535	+31.8%	46.4%	0.6%
HomeScout	44,451		49.7%	49.7%

Concerning Bill To Customers

Customer	Invoiced Sales Current	Invoiced Sales Last Year	Average Invoiced Sales Per Month
Surston	6,516	36,879	28,353
Alstroni	0	1,944	10,792
TeleCity	252	3,039	8,228
RCK United States GP	1,907	8,840	6,855
DDR	38	2,346	2,197
Rodney Hughes	0	17,824	2,063
OKB United States Corp.	0	2,504	2,004
QXG	0	1,114	1,315
Aureco	178	460	1,459
MXS	0	312	1,186

Invoiced Sales by Key Drill Down

Current AR Balance (Net Due Date)

Total AR Balance:	525,543.42
Over 30 Days Past Due:	-1,813.58
Percent Over 30 Past Due:	-0.3%

Troubled AR Accounts

Customer	Total Balance	Over 30 Past Due
FTQ Chill Corp.	444.68	444.68
MyStation	257.95	55.47
RealMart Advance LP	192.60	166.13

Current AR Balance (Invoice Date)

Total AR Balance:	525,543.42
Over 60 Days Past Invoice:	116,994.22
Percent Over 60 Past Invoice:	22.3%

Troubled AR Accounts

Customer	Total Balance	Over 60 Past Inv
Joel Baker	288,727.73	25,838.95
InfoFlash	208,801.50	90,304.15
FTQ Chill Corp.	444.68	444.68
MyStation	257.95	55.47
RealMart Advance LP	192.60	166.13

KEY QUESTIONS ANSWERED

- What do bookings and invoicing look like month-to-date (MTD) for this customer, and how does that compare to their 12-month invoicing averages?
- How do sales and associated gross profit percentages look for their top product groups MTD versus the prior 12 months?
- Which products did they buy at this same time last year that they are not buying this month?

Bill To Customer Operational Scorecard

Bill To Customer: Joel Baker (102056)

Current Month Overview		Last Month Overview	
Booked Value:	143,247	Booked Value Last Month:	197,491
Invoiced Value:	251,690	Invoiced Value Last Month:	8,039
Invoiced Trend - Current to 12 Month Avg:	+382.6%	Average Invoice Value Last 12 Months:	52,158
Projected Invoiced Value:	293,639	Profit% Last Month:	51.7%
Invoice Trend - Projected Invoice to 12 Month Avg:	+463.0%	Profit% Difference - Last to 12 Month:	3.1%
Profit% Current:	43.0%	Profit% Last 12 Months:	48.6%
Profit% Difference - Current to 12 Month:	-5.7%		
Profit% Difference - Current to Last Month:	-8.7%		

Quotes and Open Orders			
Top Open Quotes by Products			
	Quoted Value	Quoted Profit%	
Joel Baker	3,764,761	44.5%	
0113-12W - Trio Sanwarm	599,043	45.5%	
1070116 - Mat-Tax	453,778	44.9%	
1080116 - Indigo Zap	438,605	42.9%	
PCP8X2017 - VoyaapkiX	216,537	45.0%	
PCP8X2017 - Zun-Fresh	177,059	54.4%	
SPECIAL ITEM - Flexflex	171,193	-17.2%	
ROADCROSSING1212 - Keytom	132,745	42.1%	
PCP12X2017 - Canfind	86,840	40.1%	
PC51217 - Koncore	78,416	32.8%	
1050113 - Kin Fan	77,945	49.7%	

Open Orders by Order Number			
	Open Value	Order Count	Avg Days Open
Joel Baker	81,138	5	38
1319297	32,799	1	45
1319310	29,957	1	45
1320367	8,597	1	32
1321006	6,585	1	24
1321732	3,200	1	15

Top Product Groups MTD vs Prior 12				
	Invoiced Sales	Trend	Profit%	Diff
Bamlatdox	182,007	+955.5%	42.0%	-4.8%
Innemlab	53,861	+303.4%	52.3%	-0.6%
Fintechnology	15,822	+386.7%	23.0%	-23.5%
Bluehigh	0	-100.0%	0.0%	-48.8%
Cancare	0	-100.0%	0.0%	-31.7%
Codecan	0	0.0%	0.0%	0.0%
Fasedex	0	-100.0%	0.0%	-55.3%
Fasekix	0	-100.0%	0.0%	-41.2%
K-Unitaxon	0	-100.0%	0.0%	-39.2%
Multiplexus	0	+100.0%	0.0%	-100.0%

Top 10 Product Groups by Rolling 12 Sales				
	Invoiced Sales 12 Months	Invoiced Sales Trend 12 Months	Profit%	Profit% Diff
Bamlatdox	206,931	+14.1%	46.7%	1.5%
Innemlab	160,237	+9.6%	52.9%	-0.2%
Bluehigh	146,186	+136.1%	46.8%	-5.5%
Solla	70,679	+151.1%	46.3%	18.3%
Fintechnology	39,007	+120.9%	46.5%	-4.0%
Ronzoom	2,048	-37.4%	30.0%	-7.0%
Tondom	551	68.9%	68.9%	68.9%
Fasedex	371	-88.3%	55.3%	14.2%
Fasekix	280	41.2%	41.2%	41.2%
Cancare	176	31.7%	31.7%	31.7%

Concerning Products			
	Invoiced Sales Current	Invoiced Sales Same Month Last Year	Average Invoiced Sales Per Month
PCP8X2017 - VoyaapkiX	0	16,580	4,836
1071301W - Ope Sanflex	0	1,964	350
PCP8X1017 - Dentogaphase	0	3,398	283
1320140 - Tansilzap	0	533	250
1070901W - Alpha-Heme	0	512	190
1080110W - Tech Zootip	0	865	187
0111-12W - Volttom	0	2,155	180
W159FXEFLG - Sontax	0	2,090	174
1071601W - Tempapdom	0	505	145
W159FX194B - Quotesing	0	261	128

Invoiced Sales by Key Drill Down

Sales by Products

Accounts Receivable Totals (Net Due Date)	
Total:	288,727.73
Current:	261,888.78
AR 1-30 Days:	28,503.65
AR 31-60 Days:	0.00
AR 61-90 Days:	0.00
AR 91-120 Days:	-242.76
AR 121+ Days:	-1,421.94

Accounts Receivable Totals (Invoiced Date)	
Total:	288,727.73
AR 1-30 Days:	256,751.17
AR 31-60 Days:	5,137.61
AR 61-90 Days:	28,503.65
AR 91-120 Days:	0.00
AR 121+ Days:	-1,664.70

OPEN QUOTES MODULE

This module captures orders that have been quoted but not yet booked.

Drill-Downs Columns

- Bill To Customer
- Bill To Customer Type
- Contact
- Main Vendor
- Product
- Product Line
- Product Rank
- Sales Rep
- Ship To Customer
- Warehouse
- Writer

- Average Days Open/Line
- Average Open Profit/Line
- Average Profit/Open Quote
- Average Quote Amount/Line
- Average Quote Amount/Open Quote
- Line Count
- Open Cost
- Open Profit
- Open Profit Percentage
- Open Quote Amount
- Open Quote Count
- Units Open

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OPEN ORDERS MODULE

This module captures orders that have been booked and not yet fulfilled.

Drill-Downs

- Bill To Customer
- Bill To Customer Type
- Main Vendor
- Order
- Order Type
- Product
- Product Line
- Product Rank
- Sales Rep
- Ship To Customer
- Warehouse
- Writer

Columns

- Average Days Late/Late Line
- Average Days Open/Line
- Average Profit/Open Line
- Average Profit/Open Order
- Average Value/Open Line
- Average Value/Open Order
- Late Line Count
- Late Order Count
- Line Count
- Open Cost
- Open Order Count
- Open Profit
- Open Profit Percentage
- Open Value
- Units Late
- Units Open
- Units Ordered

BOOKINGS MODULE

This module captures orders that have been booked but not yet invoiced. It includes 300+ Reports and the Bookings Dashboard.

Drill-Downs

- Bill To Customer
- Bill To Customer Type
- Direct Shipment
- Main Vendor
- Product
- Product Line
- Product Rank
- Sales Rep
- Ship To Customer
- Warehouse
- Writer

Columns

- Average Bookings/Line
- Average Bookings/Order
- Average Profit/Line
- Average Profit/Order
- Bookings Cost
- Line Count
- Order Count
- Profit
- Profit Percentage
- Units Ordered

About MITS

MITS helps hundreds of distributors and manufacturers leverage the data in their ERP and other business systems to make better decisions, every day and at every level of their organization. Established in 1996, MITS' interactive reporting and business intelligence software combines industry best practices with the flexibility to meet the unique needs of every customer. From standard to custom reports, dashboards and scorecards, MITS drives sales growth, profitability, and operational efficiency for competitive advantage.

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