

# Sales Operational Bundle for Eclipse

## Improve customer engagement with daily actionable insights

MITS 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 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 two new supporting modules (Open Quotes, Open Orders).\*

**\*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 on the three scorecards that come with this Bundle.

### KEY QUESTIONS ANSWERED

- Is my 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
Invoiced Trend - Projected Invoiced 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%

Top Open Quotes			
Customer	Quoted Value	Quoted Profit%	Avg Days Open
Delgado, William	15,174,247	38.8%	269
Landers, Barry	2,689,478	26.6%	194
Carr, Justin	2,627,828	21.9%	161
Doty, Mae	2,389,424	51.4%	173
Miller, Boris	1,876,665	33.3%	391
Kennedy, Robin	1,670,968	54.1%	233
Martin, Kami	1,497,599	38.8%	289
Paulsen, Landon	841,686	49.1%	378
Cook, Maria	721,750	57.6%	307
Deck, Barbara	698,612	49.6%	317
Sanders, Fay	160,236	52.4%	264

Open Orders by Bill To Customers			
Customer	Open Value	Order Count	Avg Days Open
Delgado, William	186,515	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
Surtion	2,774	3	85
MyStation	1,927	1	12
Clintagon	399	1	4
James Barnes	236	1	18
TeleCity	143	1	10

#### Last Month Overview

Booked Value Last Month:	296,654
Invoiced Value Last Month:	136,548
Average Invoiced Value Last 12 Months:	271,732
Profit% Last Month:	47.2%
Profit% Difference - Last to 12 Month:	-0.2%
Profit% Last 12 Months:	45.8%

#### Top Bill To Customers

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%
Surtion	6,516	-77.0%	46.1%	4.8%
RCK United States GP	1,907	-72.2%	51.9%	1.1%
Coicos	1,689	+132.3%	51.6%	1.8%
Kenneth Rivers	1,001	+238.5%	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	625,990	+41.0%	48.6%	-0.2%
YourSet Tobacco	408,509	+189.6%	47.7%	-0.8%
Surtion	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	82,664	+46.2%	50.8%	8.4%
RDP	59,873	+155.4%	50.3%	2.7%
CyberBit	45,535	+31.8%	46.4%	0.6%
HomeScout	44,451	0	49.7%	49.7%

#### 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 Chili 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	26,838.95
InfoFlash	208,801.50	90,304.15
FTQ Chili Corp.	444.68	444.68
MyStation	257.95	55.47
RealMart Advance LP	192.60	166.13

# KEY QUESTIONS ANSWERED

- What does 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

Booked Value: 143,247  
 Invoiced Value: 251,690  
 Invoiced Trend - Current to 12 Month Avg: +382.6%

Projected Invoiced Value: 293,639  
 Invoice Trend - Projected Invoice to 12 Month Avg: +463.0%

Profit% Current: 43.0%  
 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

Product	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%
PCPBX2017 - Voyaaplix	216,537	45.0%
PCPBX2017 - Zun-Fresh	177,059	54.4%
SPECIAL ITEM - Flexflex	171,193	-17.2%
ROADCROSSING1212 - Keytom	122,745	42.1%
PCP12X2017 - Canfind	86,840	40.1%
PCS1217 - Koncore	78,416	32.8%
1050113 - Kin Fan	77,945	49.7%

##### Open Orders by Order Number

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

#### Last Month Overview

Booked Value Last Month: 197,491  
 Invoiced Value Last Month: 8,039  
 Average Invoice Value Last 12 Months: 52,158

Profit% Last Month: 51.7%  
 Profit% Difference - Last to 12 Month: 3.1%  
 Profit% Last 12 Months: 48.6%

#### Top Product Groups

##### Top Product Groups MTD vs Prior 12

Product	Invoiced Sales	Invoiced Sales Trend	Profit%	Profit% Diff
Bamlatdox	182,007	+955.5%	42.0%	-4.8%
Inremlab	53,861	+303.4%	52.3%	-0.6%
Flintechology	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%
Fasecodex	0	-100.0%	0.0%	-55.3%
Fasekix	0	-100.0%	0.0%	-41.2%
K-Uhiteason	0	-100.0%	0.0%	-39.2%
Multiplexus	0	+100.0%	0.0%	-100.0%

##### Top 10 Product Groups by Rolling 12 Sales

Product	Invoiced Sales 12 Months	Invoiced Sales Trend 12 Months	Profit%	Profit% Diff
Bamlatdox	206,931	+14.1%	46.7%	1.5%
Inremlab	160,237	+9.6%	52.9%	-0.2%
Bluehigh	146,186	+138.1%	48.8%	-5.5%
Solla	70,679	+151.1%	46.3%	18.3%
Flintechology	39,007	+120.9%	46.5%	-4.6%
Ronzoom	2,048	-37.4%	30.0%	-70.0%
Tandom	351	68.9%	68.9%	0.0%
Fasecodex	371	-88.3%	55.3%	14.2%
Fasekix	280	41.2%	41.2%	0.0%
Cancare	176	31.7%	31.7%	0.0%

##### Concerning Products

Product	Invoiced Sales Current	Invoiced Sales Same Month Last Year	Average Invoiced Sales Per Month
PCPBX2017 - Voyaaplix	0	16,580	4,836
1071301W - Ope Sanflex	0	1,964	350
PCPBX1017 - Dentogophase	0	3,398	283
1320140 - Tamsilzap	0	533	250
1070901W - Alpha-Home	0	512	190
1080110W - Tech Zootip	0	865	187
0111-12W - Volttom	0	2,155	180
W159TEEXPLG - Sontex	0	2,090	174
1071601W - Tempaddom	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

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>▪ Bill To Customer</li> <li>▪ Customer Type</li> <li>▪ Branch</li> <li>▪ Writer</li> <li>▪ Product</li> <li>▪ Product Line</li> <li>▪ Sales Rep</li> <li>▪ Ship To</li> </ul> | <ul style="list-style-type: none"> <li>▪ Average Days Open/Line</li> <li>▪ Average Open Profit/Line</li> <li>▪ Average Value/Line</li> <li>▪ Line Count</li> <li>▪ Open Line, Commission, or Other Cost</li> <li>▪ Open Cost</li> <li>▪ Open Profit</li> <li>▪ Open Profit Line, Commission, or Other Cost</li> <li>▪ Open Profit Percentage</li> <li>▪ Open Profit Percentage Line, Commission, or Other Cost</li> <li>▪ Open Value</li> <li>▪ Units Open</li> </ul> |
|--|---|

# OPEN ORDERS MODULE

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

## Drill-Downs

- Bill To Customer
- Customer Type
- Status
- Branch
- Order Number
- Writer
- Product
- Product Line
- Sales Rep
- Ship To

## Columns

- Average Days Open/Line
- Average Open Profit/Line
- Average Open Value/Line
- Line Count
- Open Line, Commission, or Other Cost
- Open Cost
- Open Profit
- Open Profit Line, Commission, or Other Cost
- Open Profit Percentage
- Open Profit Percentage Line, Commission, or Other Cost
- Open Value
- Order Count per Customer
- Units Open

### 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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