

Sales Operational Bundle for Infor A+

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 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 on the three scorecards 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:			
Invoiced Trend - Projected Invoiced to 12 Month Avg:	+51.5%		
Profit% Current:			
Profit% Current:	43.4%		
Profit% Difference - Current to 12 Month:	-2.4%		
Profit% Difference - Current to Last Month:	-3.8%		

Quotes and Open Orders			
Top Open Quotes			
Delgado, William	15,174,247	38.8%	269
YourSet Tobacco	4,904,165	28.6%	217
Joel Baker	3,764,761	44.5%	283
MyStation	1,617,727	59.2%	297
InfoFlash	1,609,449	31.2%	231
Jacob Johnson Media Research	426,353	17.1%	467
TeleCity	324,797	-3.9%	258
Cintagon	235,720	45.3%	151
CyberBit	199,199	56.3%	160
Medium United States LP	185,156	53.4%	252
Surtion	159,014	57.8%	233

Open Orders by Bill To Customers			
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
Cintagon	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 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 Bill To Customers

Top Bill To Customers MTD vs Prior 12				
	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%
Colos	1,689	+132.3%	51.6%	1.8%
Kenneth Rivers	1,001	+238.5%	54.9%	1.4%
Cintagon	973	-9.5%	64.1%	14.5%
RQZ	731	+719.4%	46.6%	3.5%

Top 10 Bill To Customers by Rolling 12 Sales

	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%
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	82,264	+46.2%	50.8%	8.4%
RDP	50,873	+155.4%	50.3%	2.7%
CyberBit	45,535	+31.8%	46.4%	0.6%

Concerning Bill To Customers

	Invoiced Sales Current	Invoiced Sales Same Month Last Year	Average Invoiced Sales Per Month
Surtion	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

Invoiced Sales by Key Drill Down

Current AR Balance (Net Due Date)

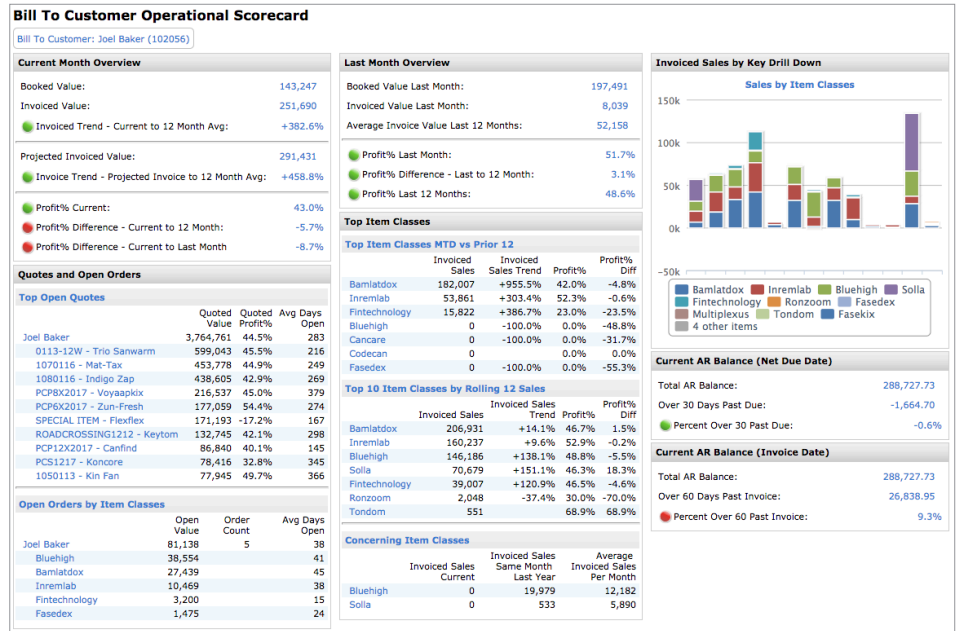
Total AR Balance:	525,543.42
Over 30 Days Past Due:	-1,813.58
Percent Over 30 Past Due:	-0.3%

Troubled AR Accounts

	Total Balance	Over 30 Past Due
FTQ Chill Corp.	446.68	446.68
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?



OPEN QUOTES MODULE

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

Drill-Downs

- Bill To Customer
- Bill To Customer Type
- Default Item Vendor
- Item
- Item Class
- Sales Rep
- Ship To Customer
- Warehouse

Columns

- 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

OPEN ORDERS MODULE

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

Drill-Downs

- Bill To Customer
- Bill To Customer Type
- Default Item Vendor
- Order
- Order Status
- Item
- Item Class
- ABC Code
- Sales Rep
- Ship To Customer
- Warehouse
- Order Taker

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
- Default Item Vendor
- Item
- Item Class
- Sales Rep
- Ship To Customer
- Warehouse
- Order Taker

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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