

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

Invoiced Value: 355,564
● Invoiced Trend - Current to 12 Month Avg: +30.9%

Projected Invoiced Value: 411,705
● Invoice Trend - Projected Invoice to 12 Month Avg: +51.5%

● Profit% Current: 43.4%
● Profit% Difference - Current to 12 Month: -2.4%
● Profit% Difference - Current to Last Month: -3.8%

Last Month Overview

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%

Quotes and Open Orders

Top Open Quotes				
	Quoted Value	Quoted Profit%	Avg Days Open	Open
Delgado, William	15,174,247	38.8%	269	
YourSet Tobacco	4,901,165	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	424,333	17.1%	407	
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	158,014	57.8%	233	

Open Orders by Bill To Customers			
	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
Cintagon	399	1	4
James Barnes	236	1	18
TeleCity	143	1	10

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	-72.0%	46.1%	4.8%
RCK United States GP	1,907	-72.2%	51.9%	1.8%
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%
MyStation	617	-50.8%	30.3%	-29.7%

Top 10 Bill To Customers by Rolling 12 Sales

	Invoiced Sales	Invoiced Sales Trend	Profit%	Profit% Diff
InfoFlash	956,745	+178.6%	41.8%	2.1%
Joel Baker	625,890	+41.0%	48.6%	-0.2%
YourSet Tobacco	408,509	+188.6%	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%
HomeScout	44,451		49.7%	49.7%

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
DDR	38	2,346	2,197
Rodney Hughes	0	17,824	2,063
OKB United States Corp.	0	2,504	2,004
QWG	0	1,114	1,315
Aureco	178	460	1,459
MOS	0	312	1,186

Invoiced Sales by Key Drill Down

Current AR Balance

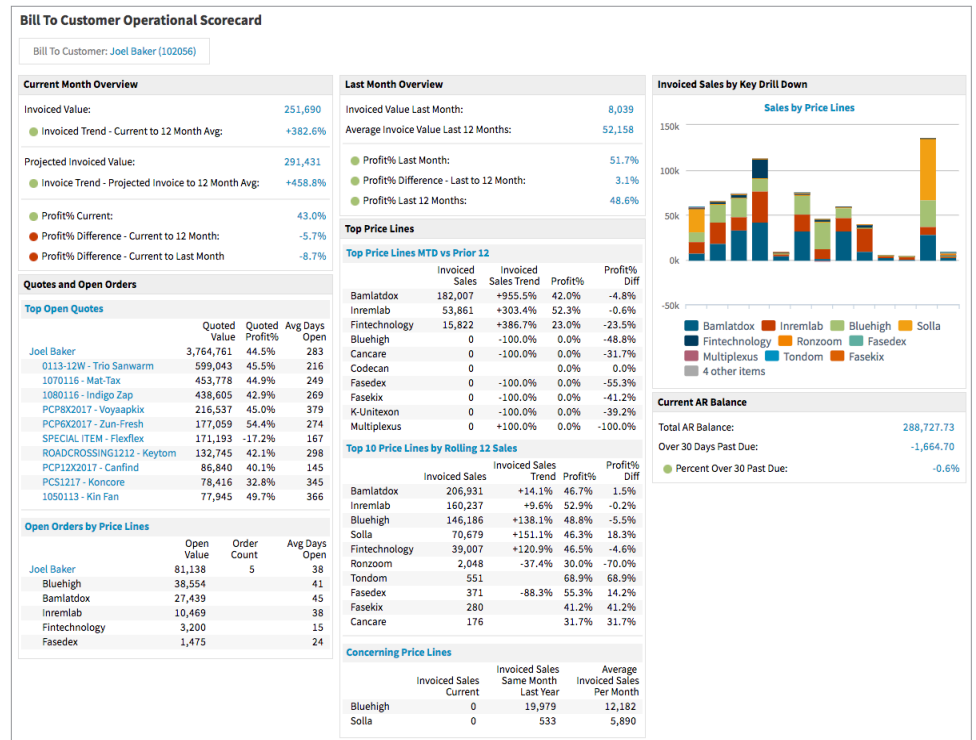
Total AR Balance: 525,543.42
 Over 30 Days Past Due: -1,813.58
● Percent Over 30 Past Due: -0.3%

Troubled AR Accounts

	Total Balance Nov 26 2016	Over 30 Past Due Nov 26 2016
FTQ Chill 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 price lines 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
- Customer Type
- Branch
- Writer
- Product
- Price Line
- Sales Rep
- Ship To
- Product Rank
- Order Number

Columns

- Average Days Open/Line
- Average Open Profit/Line
- Average 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
- Units Open
- Average Profit/Open Quote
- Average Value/Open Quote
- Open Quote Count

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
- Price Line
- Sales Rep
- Ship To
- Product Rank
- Status
- Order Number

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
- Average Profit/Open Order
- Average Value/Open Order
- Open Order Count

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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