

Reporting and Analytics

A look into the robust reporting tools available from Blue Link's ERP software, including Sales by Month, Sales by Territory, Customer Ranking and Weekly Top 10 Customers.



Sales by Month

Determine the progress of sales throughout the month, year or given time period. You can also identify trends or patterns around high or low sale. Using those insights, you can plan targeted campaigns to leverage high peaks or improve low producing months.

| Sales by Month (Shipped) | | | | | |
|--------------------------|--------------|--------------|---------|--------------|---------|
| Month | 2019 | 2018 | % +/- | 2017 | % +/- |
| January | 279,651.08 | 292,591.18 | -4.42% | 255,239.36 | 14.63% |
| February | 354,831.29 | 355,893.14 | -0.30% | 368,440.20 | -3.41% |
| March | 506,544.63 | 376,154.03 | 34.66% | 416,719.30 | -9.73% |
| April | 668,341.30 | 412,179.59 | 62.15% | 368,407.01 | 11.88% |
| May | 348,650.19 | 474,368.30 | -26.50% | 442,690.33 | 7.16% |
| June | 425,701.59 | 471,015.55 | -9.62% | 414,068.89 | 13.75% |
| July | 74,425.27 | 461,682.35 | -83.88% | 425,201.93 | 8.58% |
| August | | 330,396.69 | | 493,433.82 | -33.04% |
| September | | 261,656.70 | | 314,309.26 | -16.75% |
| October | | 445,881.34 | | 396,345.94 | 12.50% |
| November | | 373,075.76 | | 314,769.30 | 18.52% |
| December | | 339,196.23 | | 364,336.60 | -6.90% |
| Total | 2,658,145.35 | 4,594,090.86 | -42.14% | 4,573,961.94 | 0.44% |

Sales by Territory

Easily identify how each territory is performing and see the performance of individual reps. This report can help you identify which territories to focus on, where to add resources and other factors that influence sales in any given area.

As Of Date ☐ NULL Type Territory Region

1 of 1 100% Find | Next

Sales By Territory (Shipped)

| | Australia | | CA-Montreal | | CA-Toronto | | SINGAPORE | | United Kingdom | | Total | |
|------------------|-----------------|-----------------|------------------|-------------------|-------------|-----------------|-----------------|-----------------|-------------------|-------------------|-------------------|-------------------|
| Month | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 | 2019 | 2018 | 2019 Total | 2018 Total |
| January | 1,203.25 | 0.00 | 4,710.50 | 46,578.73 | | | | | 21,246.35 | 23,803.65 | 27160.10 | 70,382.38 |
| February | | | 22,182.13 | (1,453.87) | | | | | 9,744.87 | 19,735.03 | 31926.99 | 18,281.16 |
| March | | | 7,925.13 | 66,341.44 | | | | | 42,568.58 | 39,565.52 | 50493.70 | 105,906.95 |
| April | 0.00 | 2,236.00 | 3,783.38 | 4,380.00 | | | 2,565.00 | 0.00 | 22,717.41 | 18,810.46 | 29065.78 | 25,426.46 |
| May | | | 1,147.50 | 11,273.25 | | | | | 30,146.80 | 50,285.21 | 31294.30 | 61,558.46 |
| June | | | 10,698.75 | 21,279.84 | | | 1,171.00 | 0.00 | 24,358.20 | 39,471.41 | 36227.95 | 60,751.25 |
| July | | | 5,413.00 | 5,418.75 | | | | | 3,890.44 | 33,661.88 | 9303.44 | 39,080.63 |
| August | 0.00 | 3,419.56 | 0.00 | 5,145.75 | | | | | 0.00 | 20,490.25 | 0.00 | 29,055.56 |
| September | | | 0.00 | 9,687.13 | | | | | 0.00 | 9,134.84 | 0.00 | 18,821.96 |
| October | | | 0.00 | 5,261.25 | | | 0.00 | 717.00 | 0.00 | 23,833.02 | 0.00 | 29,811.27 |
| November | | | 0.00 | 20,354.25 | 0.00 | 2,276.50 | | | 0.00 | 28,583.47 | 0.00 | 51,214.22 |
| December | | | 0.00 | 17,285.63 | | | 0.00 | 1,995.44 | 0.00 | 23,344.75 | 0.00 | 42,625.81 |
| Total | 1,203.25 | 5,655.56 | 55,860.38 | 211,552.13 | 0.00 | 2,276.50 | 3,736.00 | 2,712.44 | 154,672.63 | 330,719.49 | 215,472.26 | 552,916.12 |
| % +/- | -78.72% | | -73.59% | | -100.00% | | 37.74% | | -53.23% | | -61.03% | |
| Total YTD | 1,203.25 | 2,236.00 | 55,860.38 | 149,989.38 | 0.00 | 0.00 | 3,736.00 | 0.00 | 154,672.63 | 191,671.28 | 215,472.26 | 343,896.66 |
| YTD % +/- | -46.19% | | -62.76% | | #Error | | #Error | | -19.30% | | -37.34% | |

Customer Ranking

Zero in on customers that are not buying the same quantities of products this year compared to previous years. By investigating increases or decreases in purchasing behavior by customer, you identify industry trends and see which customers need more support.

| Customer Code | Customer Name | YearSales | PreviousYear | Year Rank | Prev. Year Rank |
|---------------|--------------------------|-----------|--------------|-----------|-----------------|
| CHASSERON | CHASE ERWIN | 216192.70 | 7009.40 | 1 | 23 |
| THEOCHONT | THEO DECOR OF CANADA | 139799.71 | (3160879.52) | 2 | 946 |
| BRAYSHALER | BRAY SHALER | 104925.00 | 0.00 | 3 | 0 |
| THEOCHONT | THEO DECOR OF CANADA | 97664.69 | (685305.60) | 4 | 945 |
| BRUMMELL | B. R. BRUMMELL | 73054.50 | 0.00 | 5 | 0 |
| DECCA | DECCA | 71740.00 | 0.00 | 6 | 0 |
| CLAND | C. C. AND COMPANY DESIGN | 50998.75 | 0.00 | 7 | 0 |
| STONEHOUSE | STONE HOUSE INTERIORS | 43153.50 | 0.00 | 8 | 0 |
| CARRILLAGE | ALUMINA CONVENTION CO | 38784.00 | 0.00 | 9 | 0 |
| LANDRYDES | LANDRY'S RESTAURANTS | 34680.00 | 0.00 | 10 | 0 |
| RICHMANDES | HICKMAN DESIGN ASSOC | 33093.13 | 0.00 | 11 | 0 |
| SALOTTOCUS | SALOTTO CUSTOM HOMES | 32184.50 | 3398.00 | 12 | 42 |
| KNEEDLER | KNEEDLER FAUCHERE - OF | 30553.20 | 0.00 | 13 | 0 |
| TONYCHASS | TONY CH & ASSOCIATES | 29705.00 | 0.00 | 14 | 0 |
| DENTONHOUSE | DENTON HOUSE | 28246.00 | 93600.00 | 15 | 1 |
| ALDERANDT | ALDER AND TREED - WENT | 28163.00 | 0.00 | 16 | 0 |
| GREENHAUER | GREENHAUER DESIGN GRP | 28160.00 | 0.00 | 17 | 0 |
| OPRECHLUP | OPRECHLUP PINEO | 27693.90 | 15575.40 | 18 | 12 |
| NICKLUNDES | NICK LUNDES DESIGN ASS | 26932.00 | 8928.00 | 19 | 20 |
| SHENDALTO | SHENDAL LTD. | 26730.50 | 0.00 | 20 | 0 |
| SHENDALTO | SHENDAL LTD. | 26730.50 | 0.00 | 20 | 0 |

Weekly Top 10 Customers

Discover customer buying behavior and patterns and pinpoint which accounts customer service and sales teams should focus on. This report can also help you engage inactive customers or drive loyalty with top customers.

| Shipped | | | | | | |
|-------------------------------------|----------|----------------------------------|--------------------|----------|----------|--------|
| Client | Weekly | City | Pattern | Colour | SKU# | SQ FT |
| UNIVERSITY MICROFILMS INTERNATIONAL | 5,400.00 | WASHINGTON | RETRACTABLE / REEL | 20IN THE | 8019-20 | 491.48 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 3,300.00 | WINTER PARK | RETRACTABLE / REEL | 06STAR G | 12007-06 | 209.36 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 3,290.00 | BOSTON | RETRACTABLE / REEL | | 7015-01 | 249.73 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 2,736.00 | HOUSTON | RETRACTABLE / REEL | 07HIDE P | 3015-07 | 162.75 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 2,376.00 | NEW YORK | RETRACTABLE / REEL | --43IN T | 8019-43 | 243.80 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 2,000.00 | BRAINTREE | RETRACTABLE / REEL | 01LIKE N | 8001-01 | 251.65 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 1,674.00 | LAGUNA BEACH | RETRACTABLE / REEL | 10COWLIC | 7019-10 | 119.25 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 1,550.00 | Atlanta | RETRACTABLE / REEL | 10COWLIC | 7019-10 | 100.00 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 1,116.00 | SAN FRANCISCO | RETRACTABLE / REEL | 06COW TA | 2001-06 | 93.50 |
| UNIVERSITY MICROFILMS INTERNATIONAL | 970.08 | LONDON SW11 4NB GREAT BRITAIN | RETRACTABLE / REEL | 05BELLA | 5006-05 | 42.84 |

Blue Link ERP

Reporting and Analytics

Blue Link provides robust reporting functionality to enable real-time visibility into the status of accounts, orders, inventory and sales. With Blue Link reporting and analytics, users can pull information from different areas of the software to customize virtually any report customers or management may want.

Features include:

- ✓ Completely customizable report creation
- ✓ Ability to leverage data already entered into Blue Link in order to generate a report, render it a PDF, create an email, put your message in the email and send it to all appropriate stakeholders – automatically
- ✓ Ability to write back to Blue Link ERP, add a new record to your notes or simply update a field, changing a status
- ✓ Ability to create a report based on data within the system which can then be updated on an automatic basis for real-time insight into business health

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