

ILP BI

Sales KPIs, clear for everyone

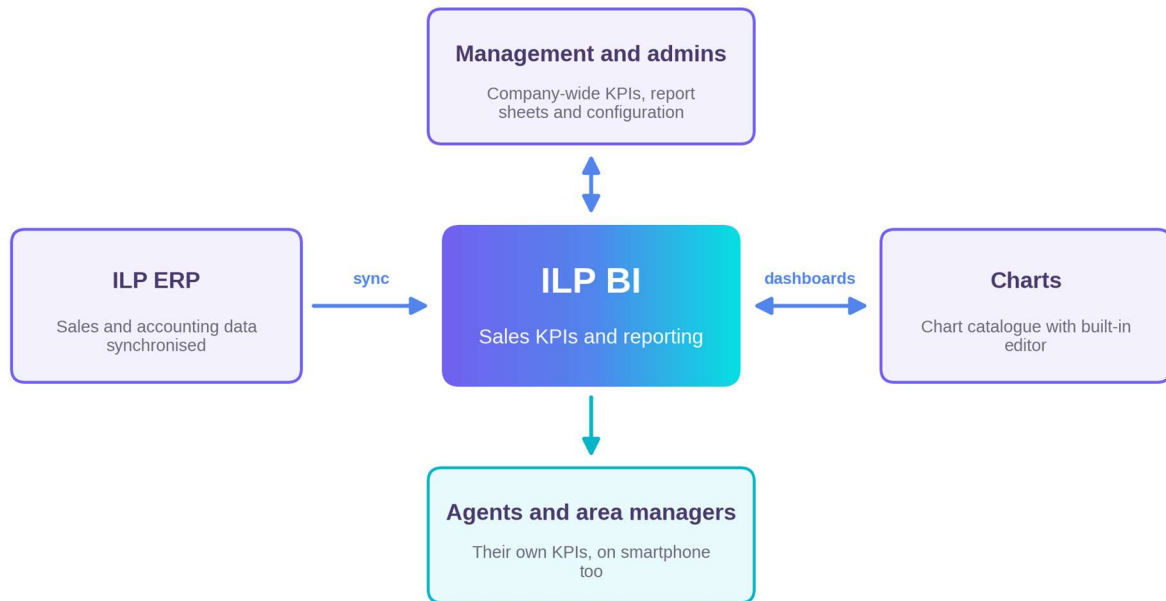
CONTENTS

- 01** ILP BI at a glance
- 02** The problem we solve
- 03** Tailored KPIs: everyone sees their own figures
- 04** KPIs that speak for themselves
- 05** Examples of KPIs to build
- 06** Workflow — From ERP to KPI
- 07** Workflow — Your KPI in six steps
- 08** Building KPI dashboards
- 09** Reliable figures
- 10** Roles, access and mobility
- 11** FAQ

ILP BI at a glance

THE LINE TO USE AT THE STAND

ILP BI is the **business intelligence portal connected to the ILP ERP**: it turns sales data into **KPIs, pivots, charts and dashboards**, and shows each person **the figures that concern them**, from the individual agent to senior management.



ILP BI between the ERP and the people who need to read the figures.

What it does, in practice

- **Imports sales** from the ILP ERP and prepares master data for items, agents and areas.
- Provides **report sheets** with lists, pivots, charts and dashboard pages.
- Automatically applies the **data scope**: agents see their own sales, area managers their area, admins the total.
- Lets each user **build their own KPIs** with custom pivots, without touching the official reports.

Who to talk to

- Companies using the **ILP ERP** that want to read sales without manual extractions.
- **Sales networks** with agents and area managers who need to follow their own results.
- **Sales management** teams that want a single dashboard and shared figures.

The problem we solve

Without a BI tool, sales figures are rebuilt from **ERP extractions and Excel files**: every report takes time, every version is different and the sales network receives the data when it's already old.

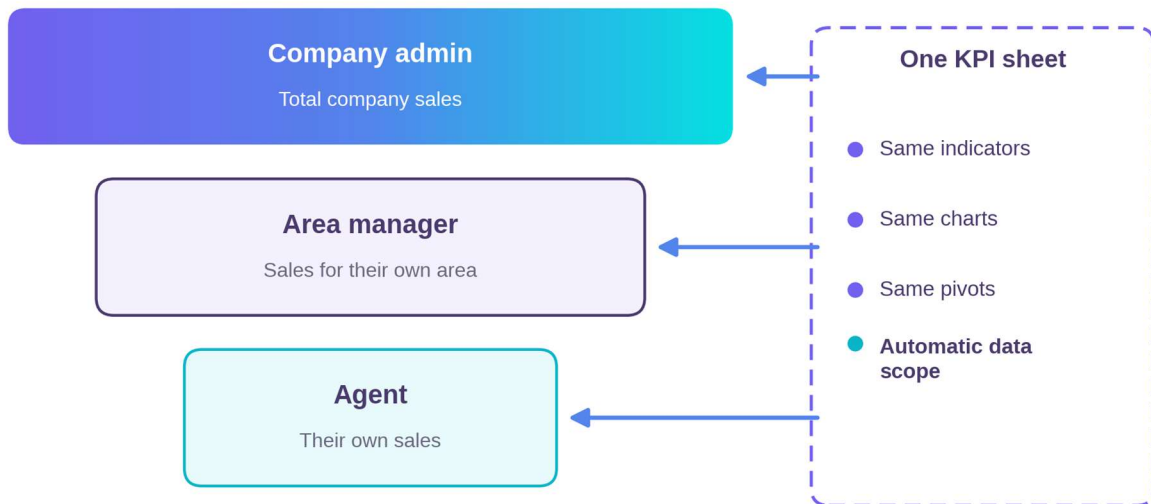
Everyday question	Without ILP BI	With ILP BI
How are sales going?	Extractions and Excel files built by hand	Ready-made report sheets, updated after each sync
How much did my area sell?	The area manager asks the office for the report	The area manager opens the sheet and sees only their area
Where are we below target?	You have to read every row	Thresholds and heat maps highlight critical values
Where does this number come from?	Back to the extraction	One click on the cell opens the detail list
I need a different analysis	New request to IT or administration	Custom pivot created by the user independently
Are these the right numbers?	Every file has its own version	Same database and same rules for everyone

KEY MESSAGE

One source, shared KPIs, each person with their own scope. Less time preparing reports, more time using them.

Tailored KPIs: everyone sees their own figures

It's the strength to show first. **The same KPI sheet** is opened by management, area managers and agents: indicators, charts and pivots are the same, but **the data filters itself** based on each person's role and area.



One KPI sheet, three data scopes.

Why it matters

- **One report to maintain** instead of one version for each area or agent.
- **No risk** of an agent seeing a colleague's figures: the scope depends on how areas and area managers are assigned.
- **Everyone speaks the same language:** in meetings everyone looks at the same KPIs, each from their own level.
- Each view, filter or tab can have **additional limits by role**, for example data reserved for management.

KPIs that speak for themselves

A good KPI is understood **at a glance**. ILP BI pivots have visual tools that draw attention where it's needed, and let you go from the figure to the detail in one click.

Sales (k€)	Jan	Feb	Mar	Apr	Total
North area	82	95	101	110	388
Centre area	64	70	58	77	269
South area	91	88	97	120	396
Islands area	40	52	49	61	202

Illustrative example with fictitious data

1 Heat map
colour shows intensity

2 Threshold on total
values below target highlighted

3 One-click drill-down
from the cell to its rows

What a KPI pivot looks like in ILP BI. Illustrative example with fictitious data.

Tool	What it does for the KPI reader
Heat map	Colours cells according to their value: you see immediately where sales are highest and lowest.
Conditions and thresholds	Highlight values above or below a threshold, for example areas below target.
Drill-down on the cell	One click on the figure opens the list of rows behind it.
Levels or flat table	The pivot can be read as a tree, expanding levels, or as a table.
Number format	Each value shown in the format that makes it easiest to read.

Examples of KPIs to build

ILP BI works on **sales** and **accounting** data from the ERP, organised by **items, agents, areas and periods**. On this basis the administrator builds the KPIs the company needs. Some examples to use at the stand:

KPI	How it's built in ILP BI
Sales by area	Pivot with areas in rows and periods in columns, with a heat map.
Sales by agent	The area manager compares the agents in their area in the same pivot.
Sales by item	List grouped by item with group totals, exportable to Excel.
Trend over time	Chart from the catalogue, linked to the sheet's view and filters.
Values below target	Conditions that colour cells below a set threshold.
Total across several periods	Period tabs at the bottom of the sheet, with All to add up the sheets.
Sales and accounting	Several views in the same sheet, with different sources and the same filters.

Charts and dashboards

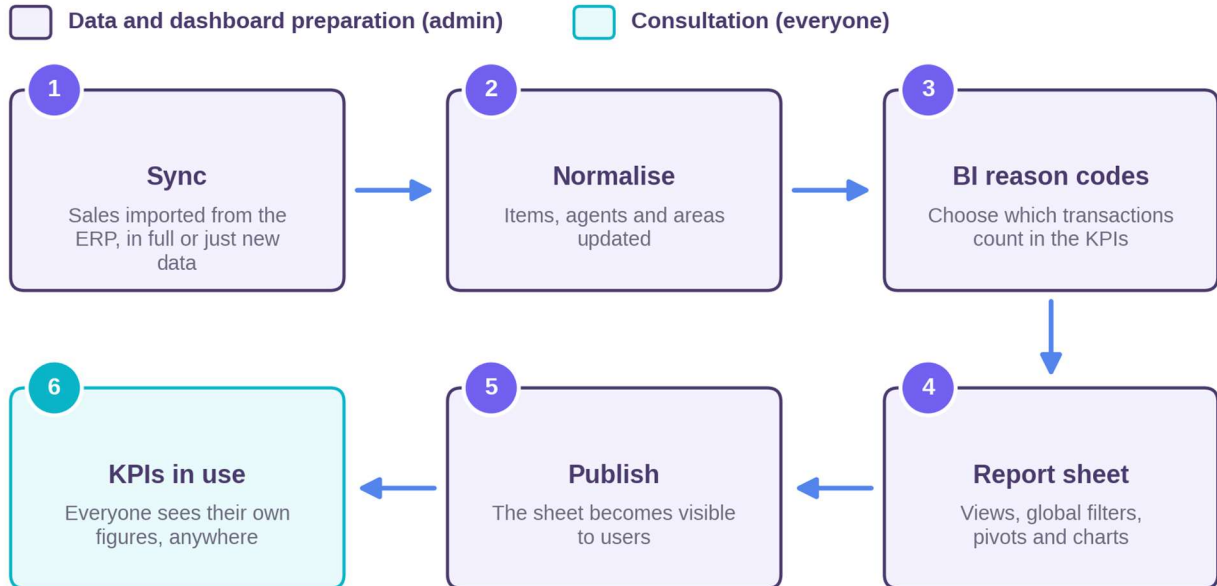
- **Chart catalogue** with a built-in editor: charts are created once and linked to the sheets.
- **Dashboard pages** with several panels, built by dragging lists and charts onto the canvas.
- Every chart respects the **filters, period and scope** of the person viewing it.

GOOD TO KNOW

The examples should be adapted to the data available in each customer's ERP: KPIs are defined together during start-up.

Workflow — From ERP to KPI

The path of the data: from the ILP ERP to the KPI on the agent's phone. The first five steps belong to the administrator, the last one to everyone.



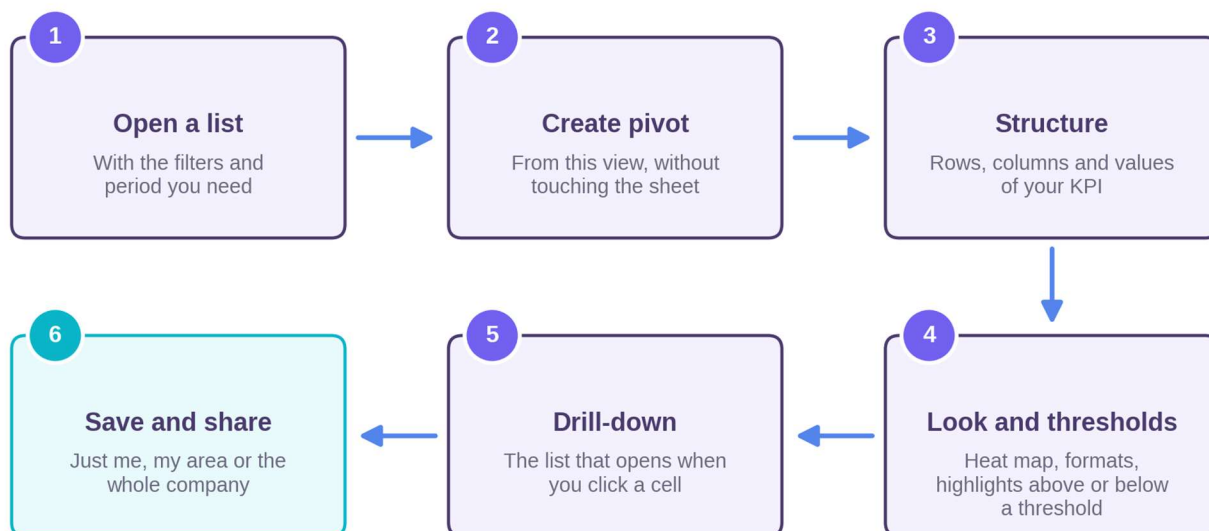
From sales synchronisation to consulting the KPIs.

Why it convinces

- **Synchronisation** in full or just of new data, with phases and logs visible in real time.
- **Normalisation** that keeps master data for items, agents and areas aligned.
- **BI reason codes**: the company decides which transactions count in the KPIs.
- A sheet stays **in draft** until it's published: users only see finished reports.

Workflow — Your KPI in six steps

With **custom pivots** every user builds their own KPIs starting from a list, **without changing the official sheet** and without asking IT for anything. Data, filters and period are the ones in front of them.

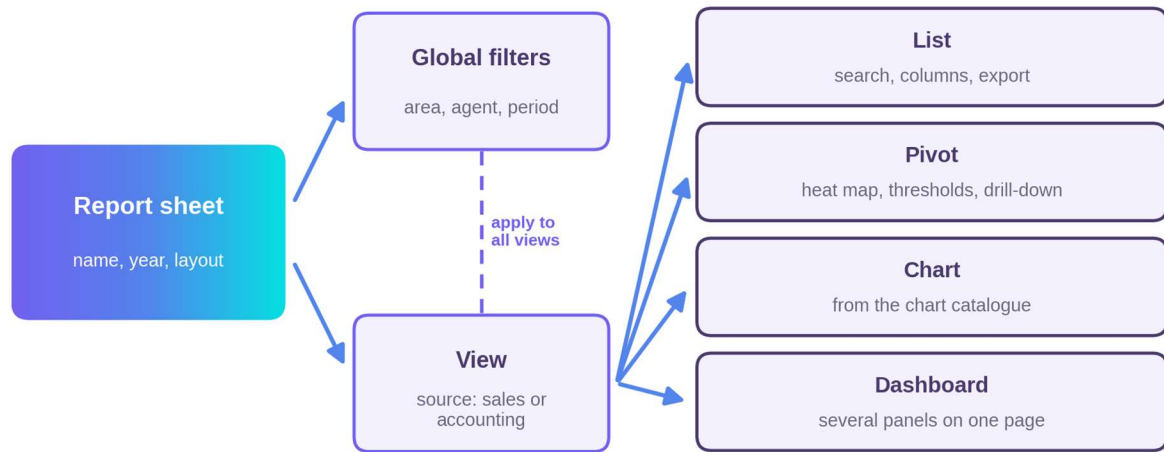


Creating a custom pivot.

Scope	Who sees it	Who can choose it
Just me	Only the person who created it	Everyone
Area	Users in the area	Area managers and administrators
Global	All users	Administrators

Building KPI dashboards

The administrator builds report sheets with visual tools. Each sheet has **one or more views**, each with its own data source, and each view contains **tabs** of type list, pivot, chart or dashboard. **Global filters** appear only once and apply to all views.



How a report sheet is structured.

Tools for the administrator

- **Report editor** with a live preview on the right while configuring the tab.
- **Canvas** to arrange lists and charts in rows and columns, page by page.
- **Auto-link** filters to columns with the same name across different views.
- **Draft** → **Saved** → **Published** cycle, and sheets that can be **duplicated** to start from a ready-made structure.

Reliable figures

A KPI is only useful if you can trust it. ILP BI gives the administrator the tools to **check data quality** before it reaches the people reading it.

Tool	What it's for
Synchronisation	Imports sales from the ERP, by date range or just new data, with a log of the phases.
Normalisation	Turns raw data into clean master data for items, agents and areas.
BI reason codes	Enables or excludes individual accounting reason codes from the analyses.
Compare	Technical check that figures are aligned across databases.
Service status	In settings, a check on services and recent operations.

Export

Every list can be **searched, grouped and downloaded as CSV or Excel**, for anyone who wants to continue the analysis outside the portal.

Roles, access and mobility

Role	What they do	Which sales they see
Agent	Consults sheets, uses filters and export, creates personal pivots.	Their own
Area manager	Same as the agent, plus shares pivots with their area.	Their area's
Company admin	Creates sheets, manages reason codes, sync, users, areas and look.	The total
System admin	Manages datasets, database connections and technical tools.	Technical role

Simple access

- Login with email and password; new users receive an **email invitation**.
- Administrators assign roles and areas and can **disable** an account at any time.

KPIs on the move

On **smartphones and tablets**, agents and area managers find a bar at the bottom with the report sheets, to use as quick tabs: KPIs are always at hand, even when visiting a customer.

Easy to learn

- **Guided tours** inside the app, by role, that walk you step by step through the real page.
- A **?** button on every page with a summary of what you can do.
- **Company logo, name and colours** configurable by the administrator.

FAQ

The most frequent questions, with a short answer to give verbally.

Q Do we need to install anything?

No: ILP BI runs in the browser, on smartphones and tablets too.

Q Can agents see their colleagues' data?

No: agents see their own sales, area managers their area's, admins the total.

Q Can I create my own KPIs?

Yes, with **custom pivots**, without changing the official reports. You can keep them to yourself or share them according to your role.

Q How often is the data updated?

After every **synchronisation** with the ERP, which can import just the new data. The frequency is agreed with the company.

Q Can I export to Excel?

Yes: lists can be downloaded as **CSV or Excel**.

Q Who creates the report sheets?

The **administrators**: agents and area managers consult them and create their own pivots.