BluWave Business Intelligence

Chart Catalogue

Chart Examples

Example 1: Reps Daily Call Report

This report can be viewed as a tabbed dashboard or if preferred broadcast daily to management as a PDF containing all the reps in one branch for one day in one PDF.
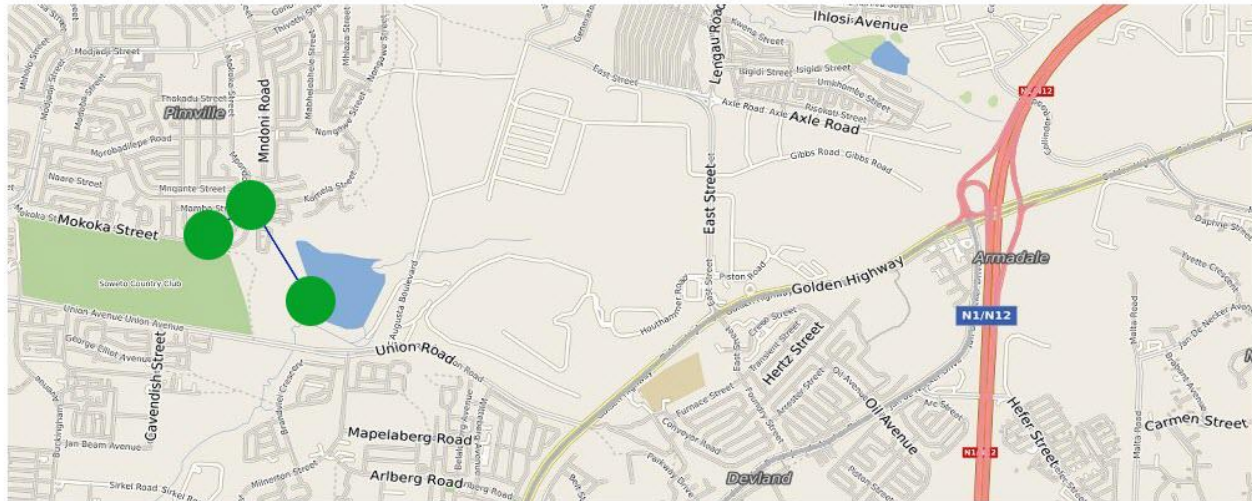

To run this report - Please select a Branch and then a sales rep from the filter.
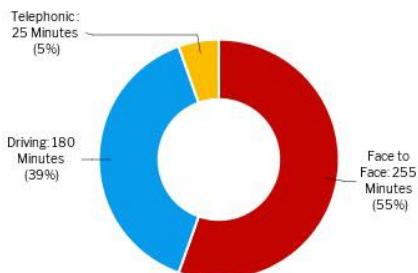
Sales Rep Daily Call Report

Sales Staff: Nkuli Moloi

Clocked In: 9:00 AM   18 May 2021   Report Date: Yesterday

Distance Travelled: 39.80km

Telephonic: 25 Minutes (5%)
Driving: 180 Minutes (39%)
Face to Face: 255 Minutes (55%)

Type	Scheduled	Completed
✉	0	2
👤	0	4
📗	0	3

Type	Time	Description	Company	Activity Notes	Name	Duration
👤	9:00 AM	Cartridge Deliver/Change	Ouma Beskuit	Delivered and installed cartridges	Michelle Bester	00:30:00
👤	10:00 AM	Demonstration	Moloi Media	Showed Dylan how to use the advanced features on their printer. Gave a demo of newer models too.	Dylan Cooke-Tonnesen	02:00:00
📗	12:30 PM	Call for Order	Dyl's Cakes		Lerato Ct	00:05:00
✉	12:40 PM	Email Received	Explore.net	Got an Email from Ronald asking for a quotes on some of our high quality colour printers for his company's marketing materials i suggested the Samsung ProXpress 4-in-1	Ronald Durant	00:00:00
📗	1:15 PM	Call for Order	Special Moments	They would like to go ahead - sent invoice	Bridgette Buss	00:15:00
✉	1:30 PM	Email Sent	Special Moments	Hi Bridgette - Thanks for the order :) See invoice attached. Regards Byron	Bridgette Buss	00:00:00
👤	2:00 PM	Presentation	BluWave Software	Presented our new product range to Peter. He likes the J-series and will need 5 (one for each branch) to start off with. He is also interested in our service plan.	Peter Burger	01:00:00
📗	3:30 PM	Call for Order	West Primary School	They only need 2 printers for now - will get 2 more in the next couple of month	June White	00:05:00
👤	4:00 PM	Present Proposal	Big 5 Guards	Went to present the proposal to Neil - He is happy will do payment by Friday	Neil Blake	00:45:00

Example 2: Monthly & Annual Customer Activity Analysis

Visual display of calling for the current month across a salespersons customer base. You can rapidly see if customers have been missed. It displays all types of activity but you can filter on just face to face actions for example.
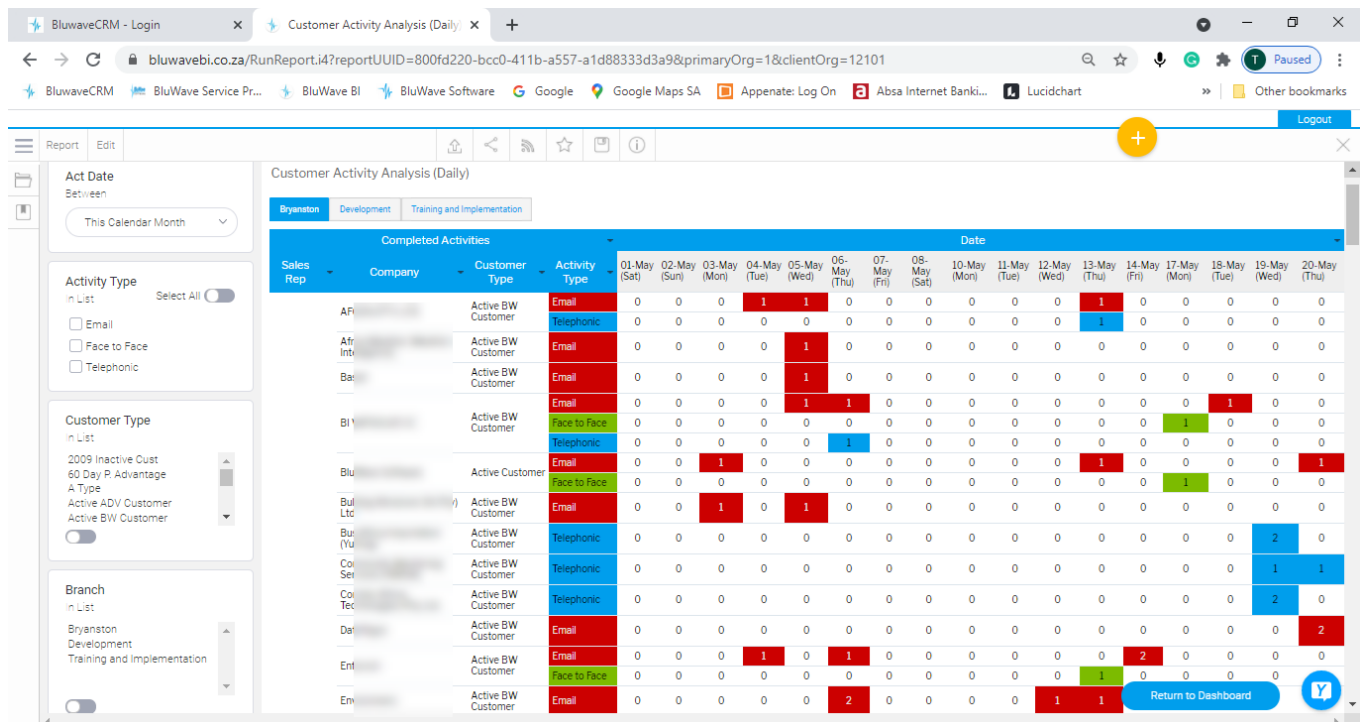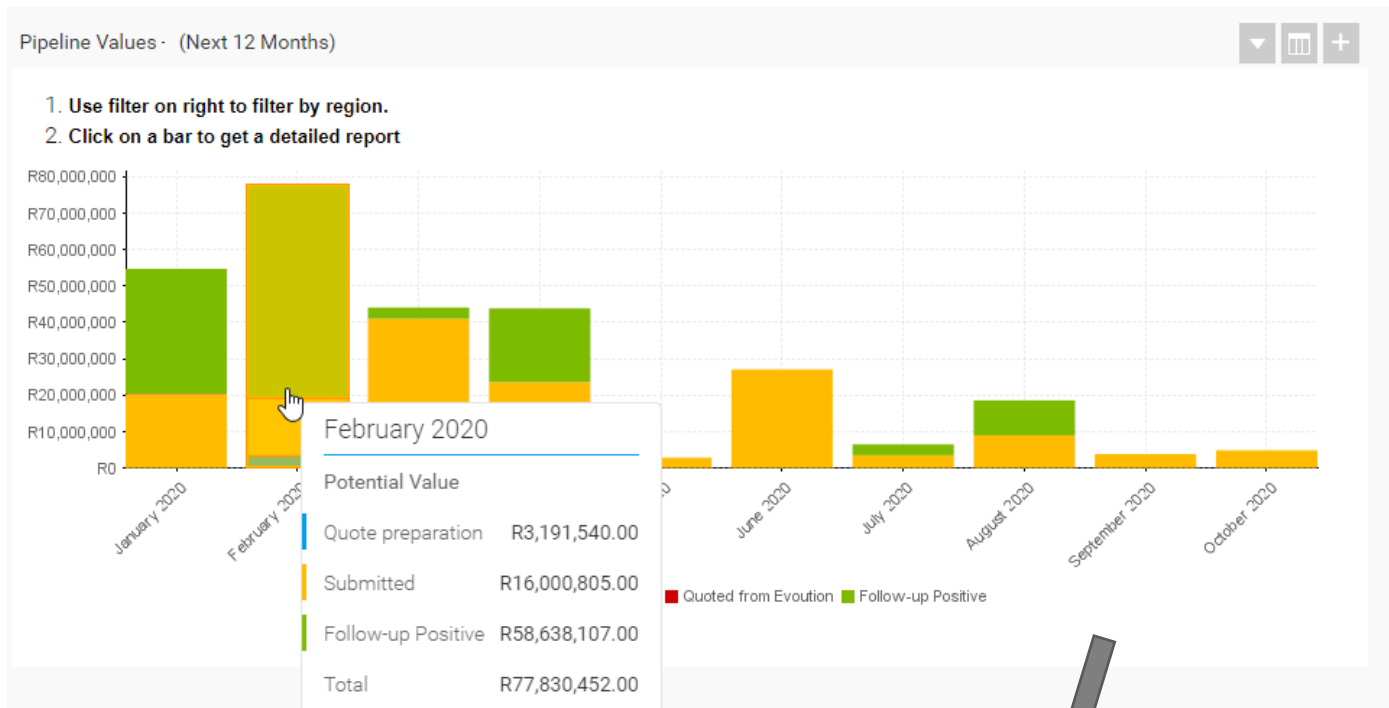

The following is a visual display of annual calls across a sales persons customer base. You can rapidly see if customers are called with the correct frequency. It displays all types of activity but you can filter on just fact to face actions for example.
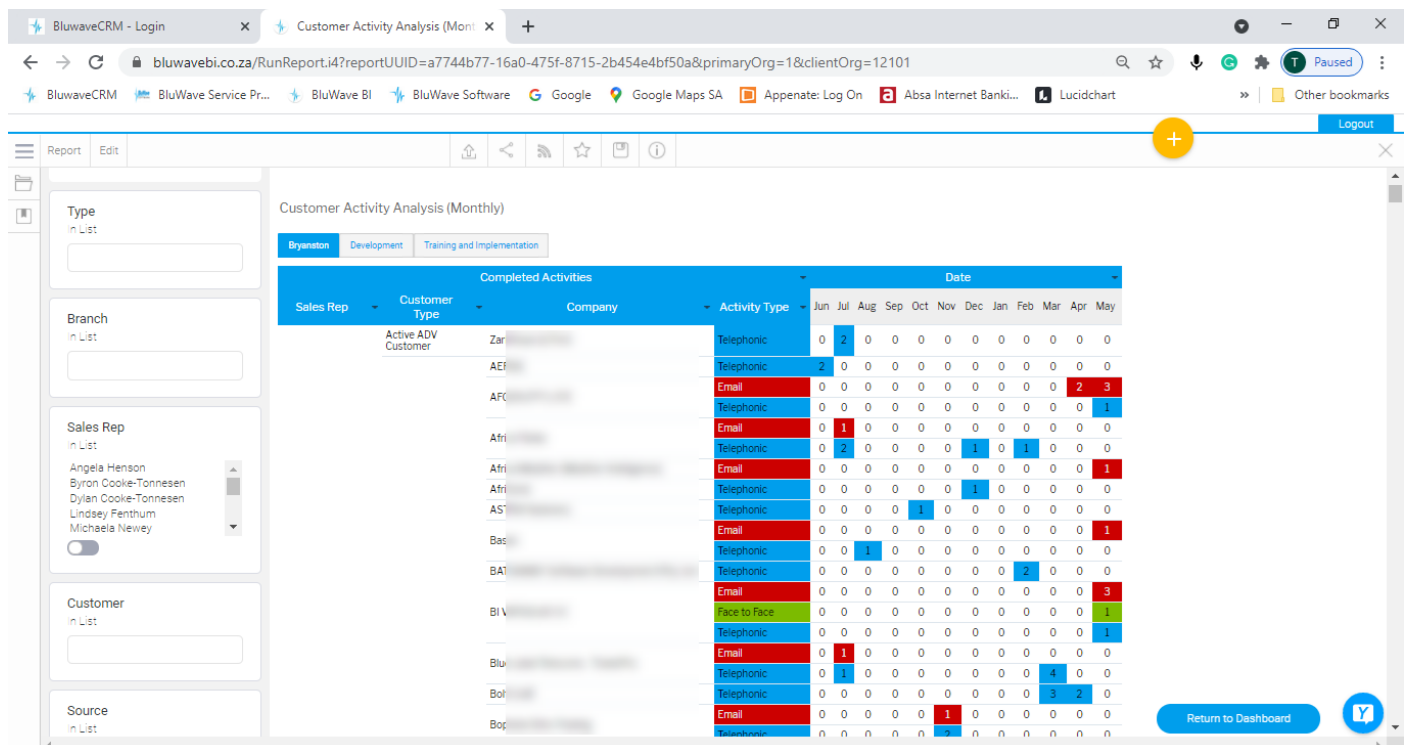
Example 3: Active opportunities with a drill down

**Chart Type:** Stacked bar – has a drill down to a detailed report

Pipeline Values · (Next 12 Months)

1. Use filter on right to filter by region.
2. Click on a bar to get a detailed report

February 2020

Potential Value	
Quote preparation	R3,191,540.00
Submitted	R16,000,805.00
Follow-up Positive	R58,638,107.00
Total	R77,830,452.00

Quoted from Evoution   Follow-up Positive

Values By Region - Detailed List (Next 12 Months)

Sales Staff	Region	Company	Status	Opportunity Name	Expected Sale Date	Potential Value	GP
	WC		Quote preparation		February 2020	R994,656.00	R289,881.00
	WC		Quote preparation		February 2020	R962,470.00	R281,069.00
	GP		Submitted		February 2020	R1,526,685.00	R380,116.00
	GP		Submitted		February 2020	R3,554,372.00	R780,776.00
	WC		Submitted		February 2020	R3,461,935.00	R775,005.00
	GP		Submitted		February 2020	R3,830,803.00	R934,733.00
	GP		Submitted		February 2020	R1,580,509.00	R337,975.00
	GP		Submitted		February 2020	R243,772.00	R66,729.00
	GP		Submitted		February 2020	R1,091,974.00	R177,829.00
	GP		Submitted		February 2020	R1,219,059.00	R299,655.00
	KZN		Submitted		February 2020	R6,057,219.00	R1,280,760.00

Example 4: Won/lost/decided not to buy opportunities with a drill down.
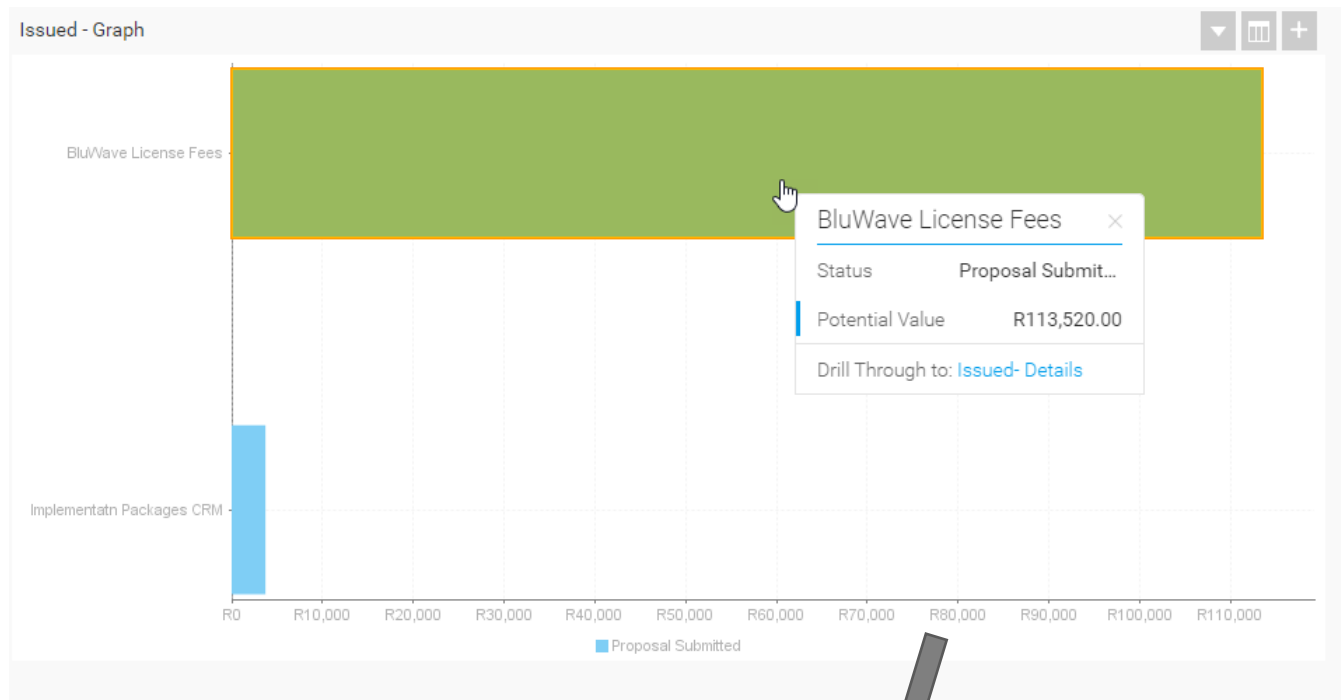
Type: Bar chart with a drill down

Example 5: Issued opportunities with a drill down

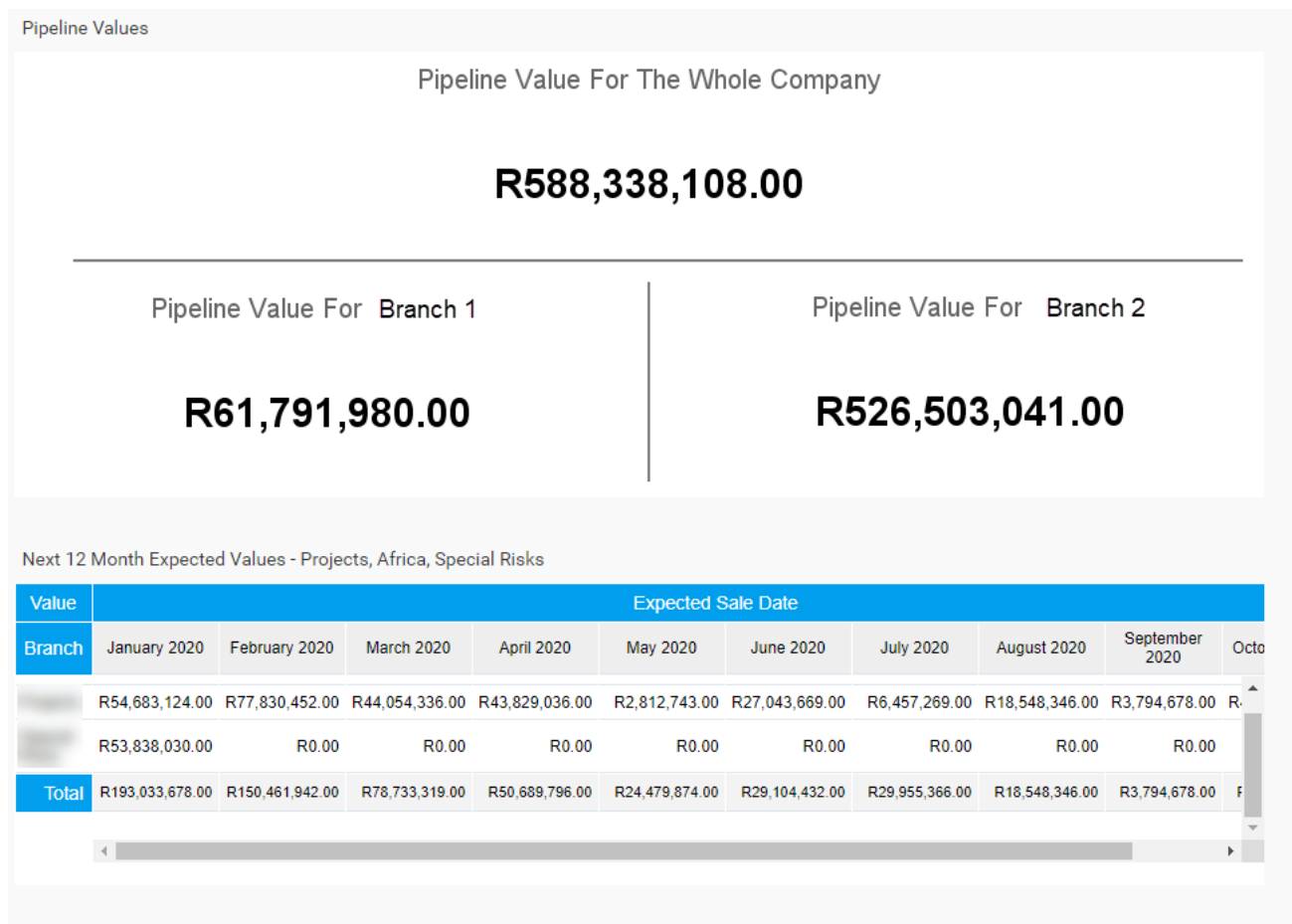**Type**: Bar chart with a drill down

Issued - Graph
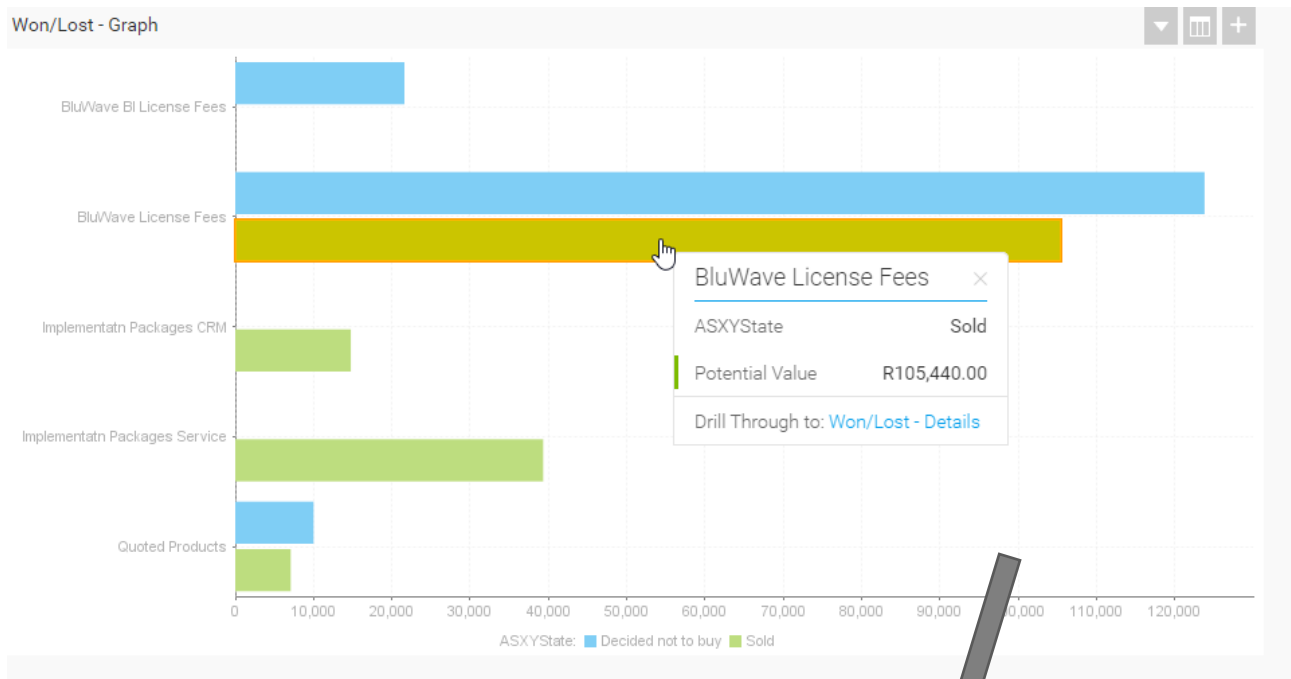
Issued- Details
Opportunities,

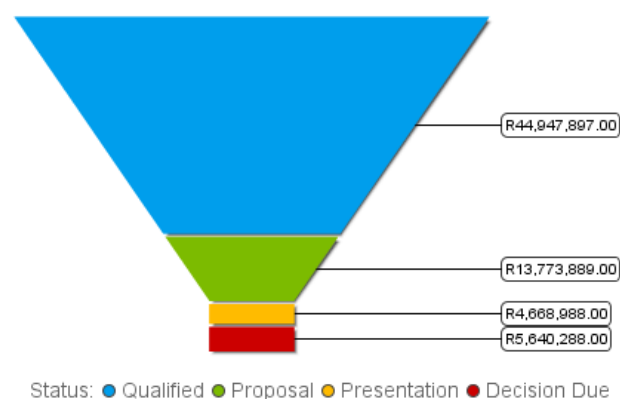| Client	Quote Date Submitted	Expected Sale Date	Sales Staff	Status	ASXYState	Potential Value	Quote No	Product Category	Product Group	Product Description
	03/02/2020	29/02/2020	Nkuli Moloi	Proposal Submitted	Active	R40,820.00	4399		BluWave License Fees	BluWave CRM/Service Monthly License Fee (per user per month)
	02/02/2020	29/02/2020	Tania Cooke-Tonnesen	Proposal Submitted	Active	R14,650.00	4398		BluWave License Fees	BluWave CRM/Service Monthly License Fee (per user per month)
	03/02/2020	29/02/2020	Tania Cooke-Tonnesen	Proposal Submitted	Active	R6,560.00	4401		BluWave License Fees	BluWave CRM/Service Monthly License Fee (per user per month)
	02/02/2020	29/02/2020	Tania Cooke-Tonnesen	Proposal Submitted	Active	R26,690.00	4397		BluWave License Fees	BluWave CRM/Service Monthly License Fee (per user per month)
	02/02/2020	29/02/2020	Tania Cooke-Tonnesen	Proposal Submitted	Active	R24,800.00	4396-1		BluWave License Fees	BluWave CRM/Service Monthly License Fee (per user per month)

Example 6: Active opportunities with a breakdown by branch

Type: Big numbers with a table and a Funnel Chart

Pipeline Values

Pipeline Value For The Whole Company

R588,338,108.00

Pipeline Value For Branch 1	Pipeline Value For Branch 2
R61,791,980.00	R526,503,041.00

Next 12 Month Expected Values - Projects, Africa, Special Risks

Value	Expected Sale Date									
Branch	January 2020	February 2020	March 2020	April 2020	May 2020	June 2020	July 2020	August 2020	September 2020	Octo
	R54,683,124.00	R77,830,452.00	R44,054,336.00	R43,829,036.00	R2,812,743.00	R27,043,669.00	R6,457,269.00	R18,548,346.00	R3,794,678.00	R·
	R53,838,030.00	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00	
Total	R193,033,678.00	R150,461,942.00	R78,733,319.00	R50,689,796.00	R24,479,874.00	R29,104,432.00	R29,955,366.00	R18,548,346.00	R3,794,678.00	F

Total Active Opportunities

Total Value: **R69,031,062.00**

R44,947,897.00
R13,773,889.00
R4,668,988.00
R5,640,288.00

Status: ● Qualified ● Proposal ● Presentation ● Decision Due

Example 7: Won/lost/decided not to buy opportunities (Actuals value, Conversion rates, Number of quotes)

Issued/Won/Lost - Last 12 Months

Status	Branch	Last Month	Last 3 Months	Last 6 Months	Last 12 Months
Issued		R2,060,763.00	R65,007,443.00	R406,175,298.00	R406,175,298.00
		R34,003,878.00	R539,349,502.00	R1,441,397,029.00	R1,441,397,029.00
		R1,431,186.00	R21,333,765.00	R60,304,293.00	R87,182,706.00
		R0.00	R3,215,052.00	R54,132,950.00	R54,132,950.00
Issued		R37,495,827.00	R628,905,762.00	R1,962,009,570.00	R1,988,887,983.00
Won		R1,664,880.00	R1,664,880.00	R9,438,933.00	R9,438,933.00
		R8,902,654.00	R38,340,544.00	R46,046,648.00	R74,986,860.00
		R464,634.00	R13,988,076.00	R25,338,537.00	R25,344,487.00
		R0.00	R0.00	R294,920.00	R294,920.00
Won		R11,032,168.00	R53,993,500.00	R81,119,038.00	R110,065,200.00
Lost		R14,065,440.00	R85,091,519.00	R114,972,166.00	R117,882,011.00
		R51,384,552.00	R422,385,357.00	R580,225,606.00	R631,908,287.00
		R0.00	R827,204.00	R1,072,224.00	R1,072,224.00
Lost		R65,449,992.00	R508,304,080.00	R696,269,996.00	R750,862,522.00
		R113,977,987.00	R1,191,203,342.00	R2,739,398,604.00	R2,849,815,705.00

Conversion Rate - Last 12 Months

Branch	Last Month	Last 3 Months	Last 6 Months	Last 12 Months
	80.79%	2.56%	2.32%	2.32%
	26.18%	7.11%	3.19%	5.20%
	32.46%	65.57%	42.02%	29.07%
		0.00%	0.54%	0.54%

Issued/Won/Lost [No. of quotes] - Last 12 Months

Status	Branch	Last Month	Last 3 Months	Last 6 Months	Last 12 Months
Issued		1	15	44	44
		13	117	333	333
		86	511	1,306	2,303
		0	2	30	30
Issued		100	645	1,713	2,710
Won		2	2	5	5
		2	16	22	31
		31	442	700	701
		0	0	1	1
Won		35	460	728	738
Lost		2	5	8	9
		11	76	115	125
		0	27	31	31
Lost		13	108	154	165
		148	1,213	2,595	3,613

Type: Table

Example 8: Active/Lost/Sold quotes on a map

Type: Numeric display (big numbers) with a map

No. Of Quotes - Big numbers

No. Of Active Quotes	No. Of Lost Quotes	No. Of Sold Quotes
1,019	540	1,652

No. Of Quotes by Location
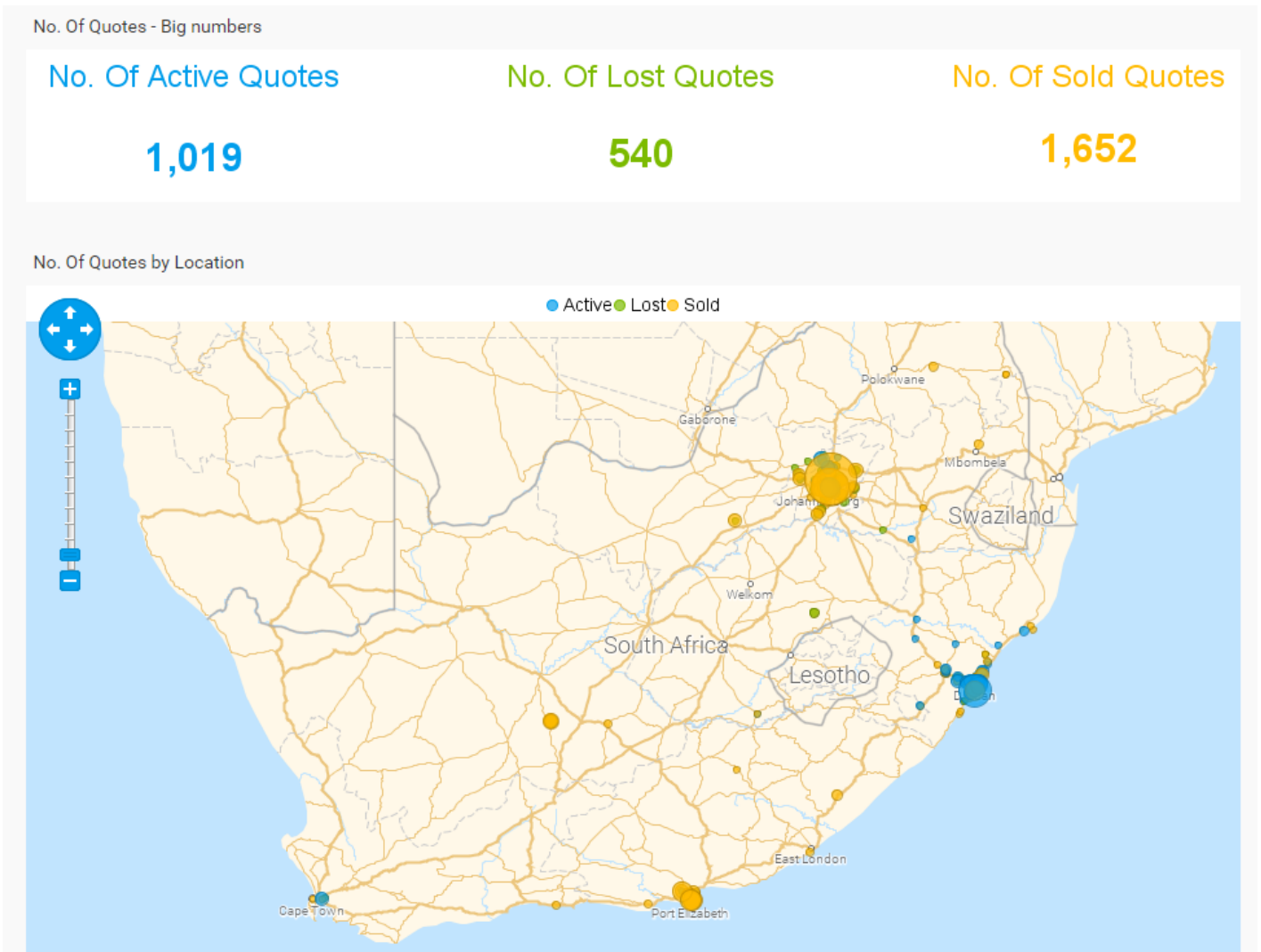
Example 9: Value of opportunities & number of opportunities by rep

Type: Table

Number & Value Of Quotes Issued

Sales Staff	Value of Opportunities Issued	No. Of Opportunities Issued
	R317,692.00	39
	R118,236.00	12
	R3,920.00	1
	R855,225.00	33
	R103,666.00	3
	R260,124.00	24
	R19,092.00	4
	R906,939.00	53
	R14,640.00	5
	R2,599,534.00	174

Example 9: Budgets & Actuals - Chart Examples

Actual vs Budgets with a variance

Type: Numeric Display (Big Numbers) with Line Graph
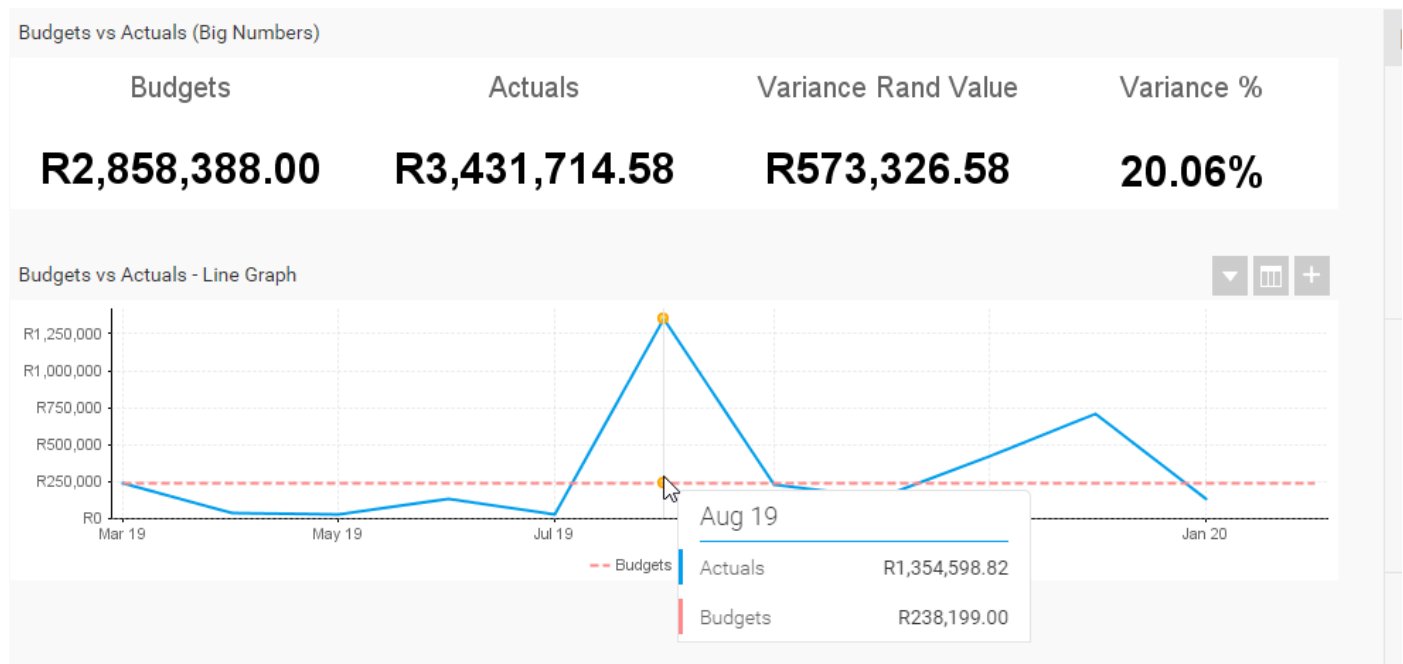
Detailed report of the actuals for a specific month

Type: Table

Example 10: Activities Examples

Map chart showing number of completed activities by a sales rep at each customer

Type: Map Chart
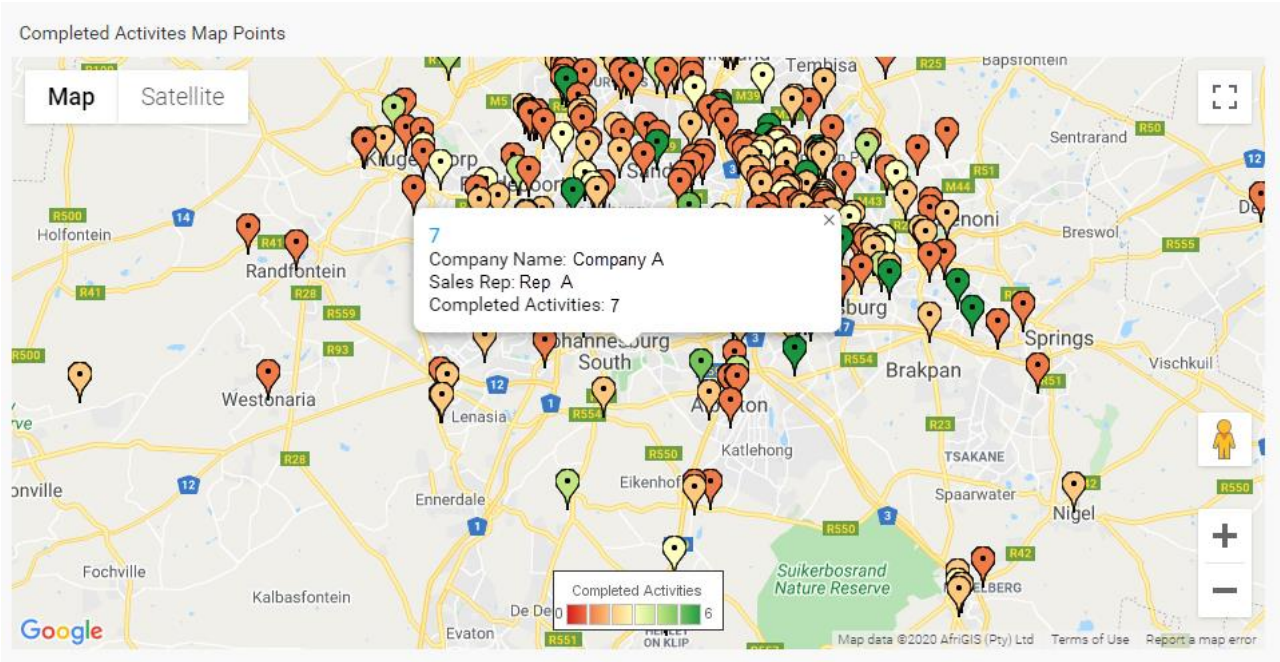
Activity by type by sales rep

Type: Bar Chart
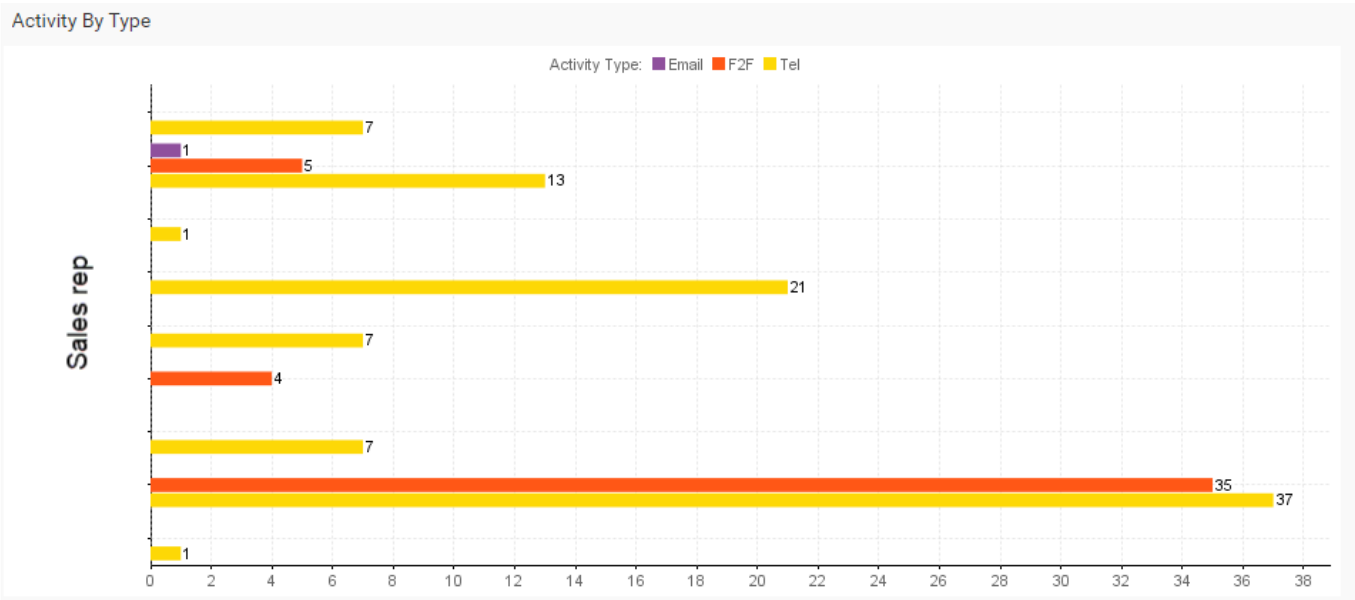
Activity completed vs overdue vs scheduled by sales rep

Type: Bar Chart
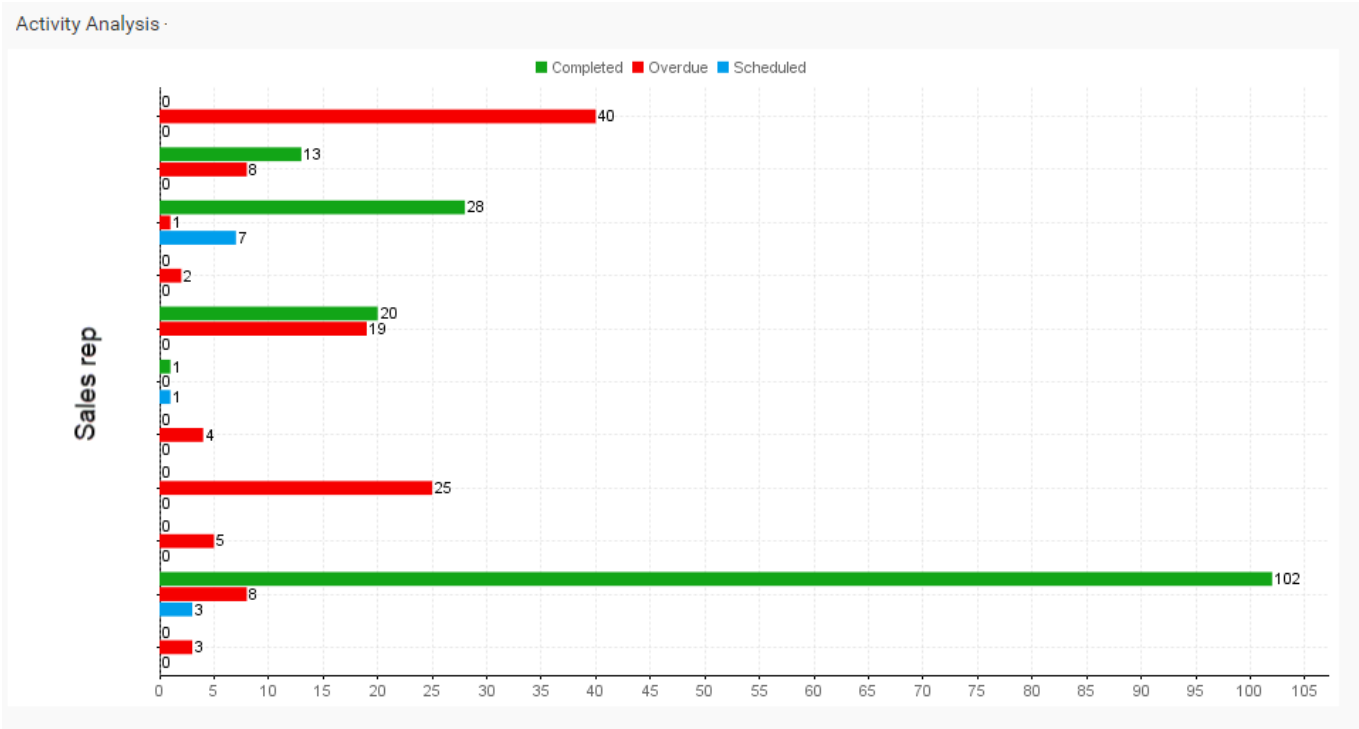
Chart Selection

Below details the types of charts we can create and what they can be used for.

Analytical

Icon	Type	When To Use
	Scatter	A scatter plot (points not joined) chart that allows the charting of 2 related attribute series. Can only be used if the data series are related. Useful for seeing trends in data that is not linear.
	Treemap	Compares metric values via a size relationship. Can also be used to show hierarchical relationships.
	Histogram	Shows the number of times a given value occurs in the dataset.
	Box & Whisker	A chart which gives a quick overview of series of values and their statistical properties.
	Trellis	A segmented chart for which the behaviour is determined by the data selected.
	Heat Grid	Plots the intensity of a metric across multiple categories.

Area Charts

Icon	Type	When To Use
	Area	You want to emphasize the magnitude of change over time. Use an area chart to show how much the value of a measure changes over time.
	Stacked Area	You want to emphasise the magnitude of change over time, while comparing multiple categories.

Bar Charts

Icon	Type	When To Use
	Horizontal Bar	You want to highlight values for easy comparison and plot your numbers horizontally. Use a bar chart to place less emphasis on time and focus on comparing values.
	Stacked Horizontal Bar	Categorical data grouped or stacked to assist comparison. Use when part-to-whole comparison is important.
	Proportional Bar	Displays how close values in different categories came to the highest category value.

Column Charts

Icon	Type	When To Use
	Vertical Column	You want to highlight values for easy comparison and plot your numbers vertically. Use a column chart to place less emphasis on time and focus on comparing values.
	Stacked Vertical Bar	Also referred to as stacked column charts and used when part-to-whole comparison is important.
	Layered	Compares the contribution of each value to a total across categories.

Combination Charts

Icon	Type	When To Use
	Combination Charts	Combination charts, in effect, superimpose one chart type above or below another. Use to improve clarity and highlight relationships between data sets.
	Overlay Chart	Use the line chart to emphasize a trend and bars to emphasize specific values. Line/Bar combinations may work better by de-emphasizing bars through the use of subtle colours.

Financial Charts

| Icon	Type	When To Use
	Financial Line	Use this chart to display a trading value with a sub chart displaying volume.
	High Low	Shows daily high, low, opening and closing values with tick positions corresponding to opening and closing values.
	Candlestick	Shows daily high, low, opening and closing values with different colour bars depending on the daily direction.

Line Charts

Icon	Type	When To Use
	Line	You want to view trends over time by plotting data at points connected by lines. Use a line chart to plot many metrics.
	Z Chart	Trends over a short period of time; displaying the data, accumulative total, and moving total.
	Stepped Line	A line chart where movement is shown in steps rather than straight lines.

Maps

Icon	Type	When To Use
	Image Maps	If you do not have GIS defined columns you can use the Image Maps to create heat maps – these are a good way to display metrics with a spatial element such as Revenue by State or Country
	Google Maps	Google Maps allow you to render location data points onto a Google map which will be displayed as a Yellowfin Chart – along with associated Google map widgets
	GIS Google Maps	A Google map which uses GIS data for its marker coordinates.
	GIS Maps	GIS Maps allow the rendering of complex GIS polygons. These can be used to render spatial reports on the fly based on the GIS data available in a report.
	GIS Bubble Map	A bubble map in which bubble positions are specified by GIS points.
	GIS Heat Map	A heat map where colours representing GIS points are blended based on intensity.

Meter Charts

Icon	Type	When To Use
	Meter	You want to measure the rate of change of a measure against pre-defined targets. Useful for dashboard reporting.
	Thermometer	Vertical representation of the meter chart, indicating a range of qualitative indicators.
	Dial	Used to communicate key performance indicators.
	Numeric Display	Shows the value of a metric on a digital display.

Pie Charts

Icon	Type	When To Use
	Pie	You want to show the relationship of parts to the whole. Use a pie chart to highlight proportions rather than actual values. If it is important to show actual values in the chart, avoid using the pie chart type.
	Multi Pie	Vertical representation of the meter chart, indicating a range of qualitative indicators.
	Ring	Similar to the pie chart, but in a circular ring form.

Special Purpose Charts

Icon	Type	When To Use
	Funnel	Used to show the status of stages in a process.
	Proportional Infographic	Displays segments on an image, with the segment size representing metric value.
	Comparative Infographic	Displays images sized in such a way to correspond to a metric.
	Radar	You want to compare data by integrating multiple axes into a single radial figure.
	Waterfall	Waterfall charts are a special type of Floating Column Chart. A typical waterfall chart shows how an initial value is increased and decreased by a series of intermediate values, leading to a final value.
	Event	Maps the occurrence of events against the values of a numeric data set over time.
	Week Density	Shows the density of occurrences based on hour relative to other densities on the same day of the week.

What does the chart need to analyse

C:\Users\Dylan Cooke-Tonnesen\Documents\BluWave BI\Dashboard & Report Catalogue