



White Cup **BI** for Distributors

The Insights You Need to Take Action

Do more with your data

White Cup BI is your hub for actionable analytics that drive revenue and profitability. Get a clearer, more comprehensive view of your sales, inventory, and customer information with a business intelligence platform built for you.

Key features at a glance:



Distributor-specific reports and dashboards so you're ready to take the analytics you need and run with them.



Optimized scorecards for more informed decisions about your products and customers.



Seamless integration with your existing databases, like your ERP and eCommerce platforms.



1100+
ready-made reports
for distributors



360°
customer view to tap
into new opportunities



1 tool
for data visualization
& team unification

"White Cup delivers incredible insights that are crucial to our success."



Cole Callahan

Director of Strategic Initiatives
Callico Distributors, Inc.

Untangle the Web of Data

Spot meaningful connections between data sets with personalized, user-friendly dashboards, charts, and reports. Effortlessly act upon untapped potential with scorecards that include information relevant to your distribution business.



Easy navigation so your team can focus on analysis and action instead of wading through streams of muddy data and detail across platforms.

Visualization of sales and product trends, quotes and orders, average supplier lead times, and more to enhance customer and vendor relationships.

Shared understanding of the insights that matter to break down silos and build more collaborative teams.



Industry-specific insights and analytics are available at a glance, with reports ready for your team to use from the moment of implementation.

Accurate forecasting with scorecards and insights on purchasing trends, inventory metrics, pricing, sales performance, and demand across product lines to inform vendor conversations.

Ready-to-use tools available to identify improvement areas and cost-saving opportunities for more productive strategizing.



Holistic view of your business to align short-term financial targets with long-term growth plans.

Consolidated data visualization that unifies essential information so teams are empowered to jump on opportunities quickly.

Seamless integration with White Cup CRM for a full-picture understanding of your customers and sales dynamics.

Built For Your Entire Team

White Cup BI gives everyone in your organization the insights they need to quickly identify your best opportunities and the technology to act on them faster. Move away from a reactive approach and use data-driven intelligence to plan for what's next.

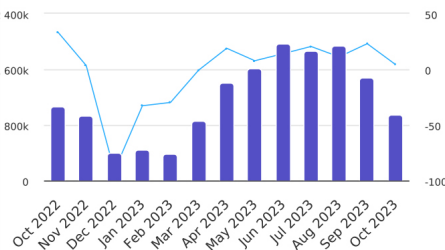
Sales

Using the Sales Rep Scorecards, managers can monitor sales trends and evaluate rep performance, ensuring more effective coaching and consistent target achievement.

Executive Review Dashboard - GT3

General Ledger

Revenue and Profit % Last 13 Months



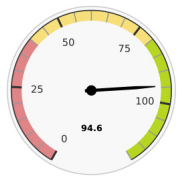
	YTDLME thru Oct 2023	YTDLME thru Oct 2022	Trend:
Revenue Amount	12,917,156.70	9,868,185.00	+30.9%
CoGS Amount	7,933,758.50	6,347,912.70	+25.0%
Expense Amount	3,597,165.20	2,922,787.40	+23.1%
Profit Amount	1,386,233.00	597,484.90	+132.0%
Cash		145,774.35	
Cash Difference since Last Month End		109,414.69	

Open Orders

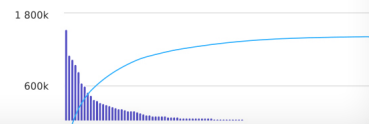
Open Value
Open Profit Percentage
Average Days Open

Sales Overview

Sales Performance: Actual vs. Yearly Budget (% of Total)



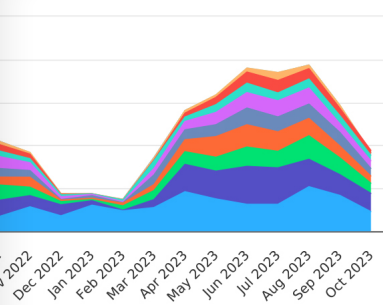
Sales by Product Group (Last 12 Months)



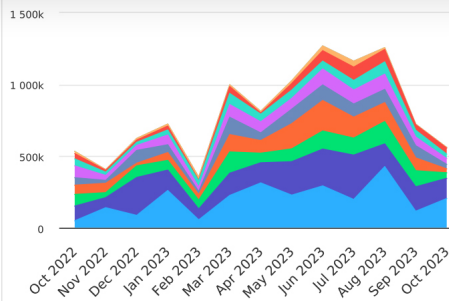
Executives

Boost productivity and performance by adopting the tools your entire team needs to succeed. Bring efficiency to your operations with a single source of truth and insights that inspire action.

Sales Last 13 Months



Warehouse 7
Warehouse 1
Warehouse 15
Warehouse 19
Warehouse 4
Warehouse 6
Warehouse 5
Warehouse 2
Warehouse 3
Warehouse 8
2 other items



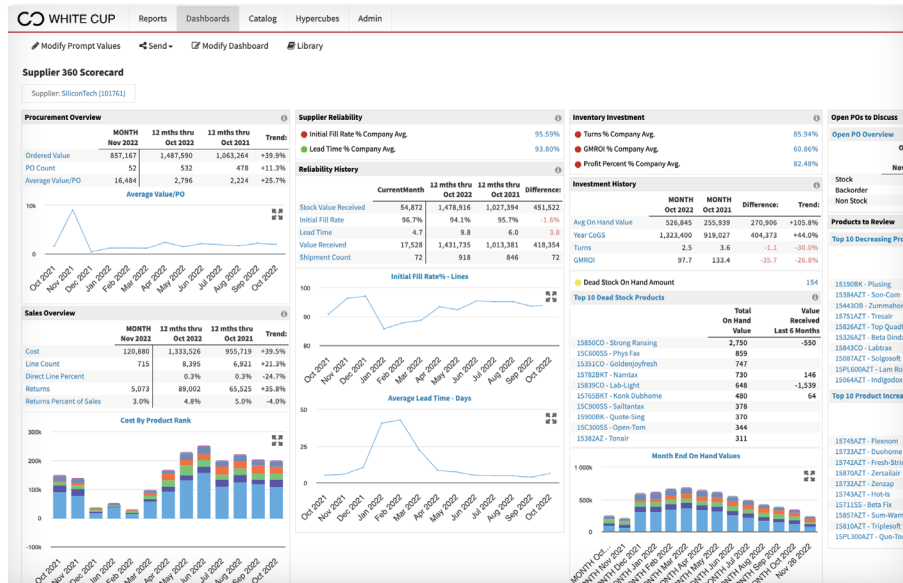
Warehouse 7
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2 other items

	MONTH Nov 2023	YTDLME thru Oct 2023	YTDLME thru Oct 2022	Trend:
Value Received	512,996	8,889,671	6,603,145	+34.6%
Line Fill Rate	97.4%	98.4%	98.5%	-0.1%

MONTH Nov 2023	YTDLME thru Oct 2023	YTDLME thru Oct 2022	Trend:
917,434	12,631,324	9,703,288	+30.2%
326,968	4,262,063	3,288,771	+29.6%
35.60%	33.70%	33.00%	-0.40%

Accounting & Operations

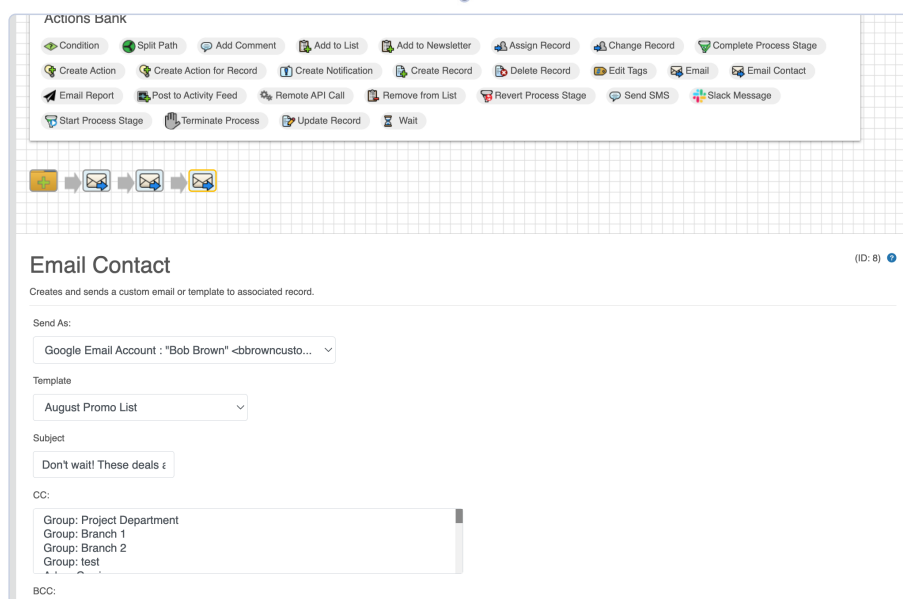
Gain better visibility into revenue, forecasting, orders, and purchasing data to better plan your budgeting, capital allocation, profitability, and shareholder value.



Marketing & IT

Align campaigns and marketing communication with sales reps' efforts by getting up-to-date views on shifting sales goals. Gain deeper insight into inventory to plan for promotions on specific products.

Free up time with easy-to-use reports that everyone in the company can utilize without IT intervention. Encourage collaboration and innovation with BI built to address distribution-specific goals and challenges.



The dashboard displays an **Actions Bank** with various actions available for a record, including:

- Condition, Split Path, Add Comment, Add to List, Add to Newsletter, Assign Record, Change Record, Complete Process Stage, Create Action, Create Action for Record, Create Notification, Create Record, Delete Record, Edit Tags, Email, Email Contact, Email Report, Post to Activity Feed, Remote API Call, Remove from List, Revert Process Stage, Send SMS, Slack Message, Start Process Stage, Terminate Process, Update Record, Wait.

The **Email Contact** form is shown below the Actions Bank, with fields for:

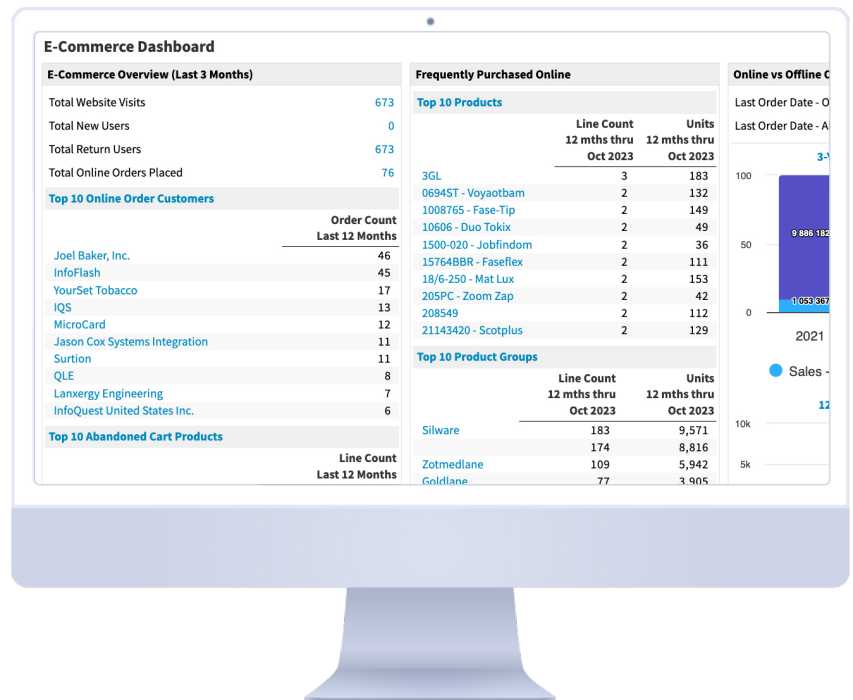
- Send As:** Google Email Account : "Bob Brown" <browncusto...>
- Template:** August Promo List
- Subject:** Don't wait! These deals €
- CC:** Group: Project Department, Group: Branch 1, Group: Branch 2, Group: test
- BCC:**

Get a Clearer Picture of Performance with eCommerce Insights

With eCommerce data in your business intelligence dashboards and customer scorecards, you can have a better understanding of overall performance.

White Cup BI integrates with leading eCommerce platforms, including Shopify, BigCommerce, WooCommerce, and Magento, so your team can:

- **Follow up with online shoppers** or searchers to answer questions
- **Have more complete reporting** on sales for vendors
- **Optimize operations and planning** with more accurate sales and inventory data



Focus on the right opportunities with **White Cup BI**

White Cup BI brings advanced analytics from your ERP, CRM, or any other database where you're storing operational data in plain sight for your entire team, empowering your organization with full visibility into every insight that matters.

With more than 25 years of distribution industry expertise, we built our business intelligence solutions to meet your specific needs and goals. With our suite of products, including White Cup CRM + BI and White Cup Pricing, you can win more deals, customer loyalty, and market share.

