

White Cup CRM and MITS BI Integration

The next generation of White Cup CRM is here, and it's now paired with our industry-leading business intelligence solution: MITS BI.

For years, distributors have tried to make do with CRMs designed for any industry, shoe-horning their specific needs into generic solutions that don't easily connect with other business data. The result: overwhelming software and frustrated users. White Cup has developed a comprehensive CRM with easy-to-use marketing capability that now integrates with our powerful MITS BI solution.



The new result?

A Revenue Intelligence platform laser-focused on driving revenue for distributors.

White Cup CRM integrated with MITS BI is a distributor's revenue engine, driving growth with every action.

The single sign-on functionality makes it easy to jump between both tools to drill down on data in White Cup CRM and MITS with just a few quick clicks.

The powerful historical sales and ordering data from MITS is easy to access on the White Cup CRM dashboard.

- a.** See the big picture with up-to date sales, profit and returns for the month and year
- b.** Take quick action to understand and resolve late orders and proactively communicate with customers
- c.** One click provides a deeper dive into MITS data for late orders
- d.** Stay on top of customer payment activity that may influence pricing or discounting conversations with Current AR Balance data on your CRM dashboard

Profilo

Pending Report

	MONTH	12 mths	12 mths	Trend
	Nov 2021	Nov 2021	Nov 2021	
Sales	305,233	3,251,098	1,802,889	75.6%
Profit	54,028	1,492,467	826,592	86.6%
Profit Percentage	17.7%	46.2%	45.8%	2.7%
Return Percent of Sales	0.2	2.0	1.9	6.9%

Tasks Summary

Task Description	Association Name	Assigned To	Due Date	Completed By	Create Date	Last Update
Let Henry know order will be late. Will email new delivery date.	Joel Baker, Inc.	William Delgado	July 26, 2022	William Delgado	July 26, 2022	July 26, 2022
Followed about KYV widgets, need to check in on buying timeline.	Joel Baker, Inc.	William Delgado	July 26, 2022	William Delgado	July 26, 2022	July 26, 2022
Call Henry about quote and see if he has any questions.	Henry Lowell	William Delgado	July 26, 2022	William Delgado	July 26, 2022	July 26, 2022

Open Orders: \$186,535.48

Account	Order Value	Late Orders	Late Dates	Avg Days Late
Joel Baker, Inc.	\$81,019.7	0	0	0
Infocash	\$68,922.36	3	25	64
William Intl Military Aircraft	\$26,226.14	2	29	78
Alvarez	\$16,633.00	1	5	20
Worljet Tobacco	\$13,849.50	1	2	66

Opportunities Summary

Name	Quote Amount	Probability	Expected Close Date	Create Date	Last Activity	Assigned To
KYC Network	\$4,755.00	80%	July 21, 2022	July 25, 2022	July 26, 2022	William Delgado
Electrol Switches	\$4,580.00	75%	July 24, 2022	July 26, 2022	July 26, 2022	William Delgado

Current AR Balance (Net Due Date)

Total AR Balance: \$525,543.42
Open Orders: -163.58
Percentage Over 30 Days Past Due: -0.3%

WHITE CUP Reports Dashboards My Metrics Admin

Sales Rep CRM + BI Scorecard

Sales & Profit Trends

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Activities

Open Orders

Customers Over 30 Days Past Due

From your MITS dashboard, your CRM activities and opportunities help provide a 360-degree view of customer accounts including sales and outreach.

- a.** Capitalize on open opportunities and compare sales trends
- b.** Easily track monthly account contact by specific activities to maximize customer service
- c.** Quickly identify and act on accounts that need attention with no recent or open orders
- d.** Easily rearrange data cubes to suite the individual work style and focus

White Cup CRM integrated with MITS BI

The revenue engine with features to drive success.

FOR DRIVING REVENUE

Business intelligence insights on the home dashboard allows you to sell proactively while tracking critical data, like open and late orders.

Year-to-date sales and profit on your CRM dashboard makes it simple to spot trends and act on them quickly.

Sales workflows are built-in based on your sales processes that eliminate busywork, so you can focus on selling.

Pipeline management for quick visibility to your pipeline, whether you're leading the team or managing your own deals, making it easy to prioritize prospecting.

Lead notifications are automated, so you know exactly when a prospect becomes a viable opportunity, eliminating leads going cold or falling through the cracks.

Quoting is built-in to quickly get accurate sales quotes in front of decision makers.

Electronic signature functionality makes it easy for customers to finalize deals without a third-party plugin.

Comprehensive search function shows the relationship between accounts, contacts, opportunities, events and quotes, providing a comprehensive customer snapshot.

FOR BUILDING PIPELINE

Marketing workflows are designed to empower sales reps, managers, sales ops and marketing people to create effective outreach campaigns that drive revenue.

Built-in marketing templates make it easy to share your company's value with prospects and customers in a way that's personalized and consistent.

Dynamic lists are a snap to create based on specific criteria you set. Want to email customers who haven't heard from you in 2 months? There's a dynamic list for that, and it's just a few clicks away.

Email campaign tracking allows you to see who has opened and clicked on your email marketing campaigns, helping to set priorities for follow up.



Take the guesswork and gut feeling out of your pricing with White Cup Pricing.

White Cup Pricing is a data-driven pricing and segmentation solution with a proven record of delivering 10X ROI in the first year. White Cup Pricing cuts a straightforward path through complicated data, creating pricing strategies that improve gross margin year over year.

To learn more, visit whitecupsolutions.com

FOR A COMPETITIVE EDGE

Access data anywhere, anytime on any device so you're prepared for prospect and customer conversations that are valuable and drive toward closing deals.

Built-in reports and role-based dashboards help the team stay focused and on track toward the company's sales goals.

Document management makes it possible to attach additional documentation to opportunities, quotes and account records, streamlining communications, customer service and sales.

Bill to/Ship to functionality ensures your invoice and products are delivered to the right place, even when they go to multiple places.



WhiteCupSolutions.com →

White Cup offers a revenue intelligence platform with integrated solutions specifically designed for the distribution industry. Our CRM, Business Intelligence (BI), and Pricing software is the complete revenue engine for distributors and is laser-focused on driving more revenue and improved profits. With decades of industry experience, White Cup is trusted by more than 1,000 customers globally.