Phase 7 of Major Sales Update: Revenue Analysis
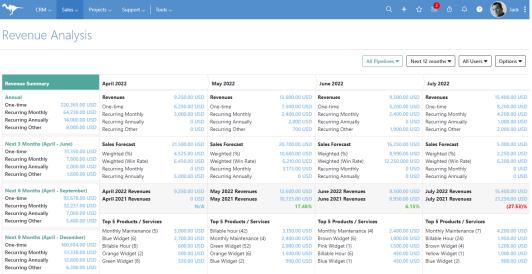
As we close in on completion of BlueCamroo's major Sales update we introduce Revenue Analysis. Analyze the revenue you can expect from sales, based on invoices that have been added. With it, you can see future expected revenue of the entire company, or what a specific team or a team member has brought in. Revenue analysis can help to plan for the future, and also help to recognize any potential revenue concerns 'today' by scrutinizing what sales you can anticipate 'tomorrow'.

Key

⭐ New Feature

🔄 Change to Existing Feature

⚙ Setup Instructions

⭐ Revenue Analysis

Healthy revenue is the ultimate goal of every business. Analyzing incoming revenue, and ultimately profit, helps businesses plan for the future, like making new hires, deciding when to release new products or services, or when to launch marketing campaigns. It can also help set budgets, allocate targets, gain investments, and much more.

Before detailing how Revenue Analysis works in BlueCamroo it is important to understand the difference between Revenue Analysis and Sales Forecasting, which was introduced in BlueCamroo 8.3.5.

Revenue Analysis estimates how much money will come into your business in a specified period of time. In BlueCamroo, it is based on Invoices that have been created for Projects or Sales Orders and are organized by their payment due date.

Sales Forecasting estimates potential sales that your business will make in a specified period of time. In BlueCamroo, it is based on estimated value of Opportunities in your Sales Pipelines. This can be analyzed in the Sales Pipelines section.

While these are two different estimations, they are each equally important, and combined, they provide valuable information on the future cash flows within a business. Both can be forecast up to 12 months in the future.

Revenue Analysis is available for all Sales and Complete users and can be accessed by navigating to **Sales > Revenue Analysis** from the main navigation bar.

There is no setup required prior to working with Revenue Analysis, however for the feature to gather meaningful data, it will need invoices with payment due dates in the future.

The main table is divided into 4 main rows displaying data on a monthly basis:

- **Revenues**: Expected Revenue from Invoices.

- **Sales Forecast**: Expected Sales from Opportunities.

- **Revenue Comparison**: Comparison of Revenue in a given month and the same month in the previous year.

- **Top 5 Products / Services:** Displays the 5 best-performing Products or Services.

Revenues and Sales Forecasts are displayed in several ways (**Note**: all of these values are displayed by default, but can be adjusted using the Options ▼ menu):

- **One-time (for Revenues only)**: Revenue of one-time sales of Products or Services.

- **Weighted (%) (for Sales Forecast only)**: The value of the Opportunities in the month adjusted by their Probability.

- **Weighted (Win Rate) (for Sales Forecast only)**: The value of Opportunities in the month adjusted by the win rate for the selected Pipeline/User/Group over the last year.

- **Recurring Monthly**: Displays the amount of expected sales from Opportunities or Revenues from invoices which have monthly recurring items.

- **Recurring Annually**: Displays the amount of expected sales from Opportunities or Revenues from invoices which have an annually recurring items.

- **Recurring Other (for Revenues only)**: Displays the amount of expected sales from Opportunities or Revenues from invoices which have recurring items paid at intervals other than monthly or annually.

The Revenue Summary Column consolidates the data for the next 3 Months, 6 Months, 9 Months and Annually.

The Sales Forecasts and Revenue Analysis can be further focused by controlling which Pipeline is being shown, the period of time that is displayed, or what specific users or groups are being analyzed.

We hope you will enjoy BlueCamroo 8.3.7, if you have any questions about this release, or if you have any suggestions or comments, please send an email to support@bluecamroo.com. We'll be glad to help!

The BlueCamroo Team