

## 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

Revenue Summary		April 2022	May 2022	June 2022	July 2022
<b>Annual</b>		<b>Revenues</b> 9,250.00 USD	<b>Revenues</b> 12,600.00 USD	<b>Revenues</b> 9,500.00 USD	<b>Revenues</b> 15,400.00 USD
One-time	220,365.00 USD	One-time 6,250.00 USD	One-time 7,500.00 USD	One-time 5,200.00 USD	One-time 8,200.00 USD
Recurring Monthly	64,238.00 USD	Recurring Monthly 3,000.00 USD	Recurring Monthly 2,400.00 USD	Recurring Monthly 2,400.00 USD	Recurring Monthly 4,200.00 USD
Recurring Annually	14,000.00 USD	Recurring Annually 0 USD	Recurring Annually 2,000 USD	Recurring Annually 0 USD	Recurring Annually 1,000.00 USD
Recurring Other	8,000.00 USD	Recurring Other 0 USD	Recurring Other 700 USD	Recurring Other 1,900.00 USD	Recurring Other 2,000.00 USD
<b>Next 3 Months (April - June)</b>		<b>Sales Forecast</b> 21,500.00 USD	<b>Sales Forecast</b> 20,700.00 USD	<b>Sales Forecast</b> 16,250.00 USD	<b>Sales Forecast</b> 5,000.00 USD
One-time	31,350.00 USD	Weighted (%) 4,525.00 USD	Weighted (%) 10,660.00 USD	Weighted (%) 8,990.00 USD	Weighted (%) 2,250.00 USD
Recurring Monthly	7,800.00 USD	Weighted (Win Rate) 6,450.00 USD	Weighted (Win Rate) 6,210.00 USD	Weighted (Win Rate) 12,250.00 USD	Weighted (Win Rate) 6,300.00 USD
Recurring Annually	2,000.00 USD	Recurring Monthly 0 USD	Recurring Monthly 3,175.00 USD	Recurring Monthly 0 USD	Recurring Monthly 0 USD
Recurring Other	1,600.00 USD	Recurring Annually 5,000.00 USD	Recurring Annually 0 USD	Recurring Annually 0 USD	Recurring Annually 0 USD
<b>Next 6 Months (April - September)</b>		<b>April 2022 Revenues</b> 9,250.00 USD	<b>May 2022 Revenues</b> 12,600.00 USD	<b>June 2022 Revenues</b> 9,500.00 USD	<b>July 2022 Revenues</b> 15,400.00 USD
One-time	92,678.00 USD	<b>April 2021 Revenues</b> 0 USD	<b>May 2021 Revenues</b> 10,725.00 USD	<b>June 2021 Revenues</b> 8,950.00 USD	<b>July 2021 Revenues</b> 21,250.00 USD
Recurring Monthly	32,237.00 USD		17.48%	6.15%	(27.53)%
Recurring Annually	7,000.00 USD				
Recurring Other	3,400.00 USD				
<b>Next 9 Months (April - December)</b>		<b>Top 5 Products / Services</b>	<b>Top 5 Products / Services</b>	<b>Top 5 Products / Services</b>	<b>Top 5 Products / Services</b>
One-time	160,554.00 USD	Monthly Maintenance (5) 3,000.00 USD	Billable hour (42) 3,150.00 USD	Monthly Maintenance (4) 2,400.00 USD	Monthly Maintenance (7) 4,200.00 USD
Recurring Monthly	51,338.00 USD	Blue Widget (6) 2,700.00 USD	Monthly Maintenance (4) 2,400.00 USD	Brown Widget (6) 1,800.00 USD	Billable Hour (26) 1,950.00 USD
Recurring Annually	12,600.00 USD	Billable Hour (8) 600.00 USD	Green Widget (52) 2,080.00 USD	Pink Widget (1) 1,500.00 USD	Brown Widget (4) 1,200.00 USD
Recurring Other	6,300.00 USD	Orange Widget (2) 500.00 USD	Orange Widget (6) 1,500.00 USD	Billable Hour (6) 450.00 USD	Yellow Widget (1) 1,000.00 USD
		Green Widget (8) 320.00 USD	Blue Widget (2) 900.00 USD	Blue Widget (1) 450.00 USD	Blue Widget (2) 900.00 USD

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.

May 2022	
<b>Revenues</b>	12,600.00 USD
One-time	7,500.00 USD
Recurring Monthly	2,400.00 USD
Recurring Annually	2,000 USD
Recurring Other	700 USD
<b>Sales Forecast</b>	20,700.00 USD
Weighted (%)	10,660.00 USD
Weighted (Win Rate)	6,210.00 USD
Recurring Monthly	3,175.00 USD
Recurring Annually	0 USD
<b>May 2022 Revenues</b>	12,600.00 USD
<b>May 2021 Revenues</b>	10,725.00 USD
	17.48%
<b>Top 5 Products / Services</b>	
Billable hour (42)	3,150.00 USD
Monthly Maintenance (4)	2,400.00 USD
Green Widget (52)	2,080.00 USD
Orange Widget (6)	1,500.00 USD
Blue Widget (2)	900.00 USD

Revenues and Sales Forecasts are displayed in several ways (**Note:** all of these values are displayed by default, but can be adjusted using the  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](mailto:support@bluecamroo.com). We'll be glad to help!

**The BlueCamroo Team**