

INTEGRATED BUSINESS PLANNING WITH IDU-CONCEPT

FAST, EFFECTIVE, EASY TO USE, REAL-TIME SUPPLY CHAIN MANAGEMENT SOLUTION.

Sales and revenue planning is a cornerstone of the budget and forecast process as generally everything else in the budget pivots on the expected sales. The requirements and complexity of an organisations sales plan may vary dramatically according to industry, sector and geographical distribution and can often result in complex Excel models causing endless hours of frustration.

In today's rapidly changing environment, companies need to leverage the latest data from multiple sources, collaborate and automate the sales planning process to be able to accurately keep track of changes and identify opportunities.



The user friendly, web-based solution facilitates real time collaboration between all stakeholders involved in the sales budgeting process and allows management to set realistic goals and targets for their sales teams resulting in a greater sense of ownership and accountability.

You can budget down to the finest details including by salesperson, customer, product line or SKU. The result is real-time aggregation and management.

What-if scenario planning and modelling can be used to better understand the effect of key value driver changes into the future.

This allows you to prepare for the future with low, medium, and high predictions and to quickly identify opportunities and be able to make changes and optimise your decision-making process.

IDU-Concept Sales Planning Module improves users' budgeting experience, resulting in a drastically reduced budget timeframe.

You can choose to deploy IDU- Concept on-premise, in a private cloud of your choice or in our Microsoft Azure-based cloud –all the platforms offer exactly the same functionality. IDU Cloud is powered by Microsoft Azure, providing world- class security, reliability, scalability, and performance. IDU Cloud is a SaaS solution that is extremely cost-effective and quick to deploy.



INCLUSIVE PLANNING

The IDU Sales Planning Module gives you the ability to create multiple versions with multiple variables and drivers, in a truly inclusive environment without the pitfalls of complex spreadsheets.



LINKING COMPONENTS

The user-friendly IDU-Concept system allows for the linking of many components to single unit drivers, creating a powerful budgeting tool, which drives the cost of sales as well as top line revenue numbers.

Each product item is linked to various components that are driven as a result of the unit budget being captured. The revenue, cost of sales and overhead accounts are linked by either a fixed amount per item or fixed percentage relationships. The system will compute and update the related general ledger accounts.



MULTI CURRENCY

Multi-currency planning is available for both full multi-currency organizations and companies that are setup to only transact, budget and forecast in the home currency but have the requirement for specific components to be calculated based on foreign currency rates.



ADVANCED CALCULATIONS

Advanced formula calculations support the ability to set up custom product and customer calculation methods. These could be multi-tiered commission plans based on criteria such as quota, quantity sold and product profitability, tiered pricing structures per product and customer or production calculations.The variations are endless.



COMPARATIVE

The item-spread capture screen provides users with a monthly analysis of the previous year's revenue units, linked budgets and forecasts for selected products and customers. These can be used as a comparative when capturing the current budget through a selected weighting factor or a calculated spread on historical trends.



REAL TIME

Budgets can be reviewed in real-time via the summary reporting module. This enables sales or regional managers to analyse the budgets and forecasts through a selected customer or product hierarchical structure. In so doing, users have the ability to drill down to the underlying detail, without the need for data aggregation.



USER EXPERIENCE

The system administrator is able to define multiple user-specific screen layouts, such as the data displayed, the calculations that are performed and the reports that are available.

This means that the user's experience of the system can be personalised according to their specific requirements.



FLEXIBLE

The system allows for the flexibility of creating multiple versions of a budget, and the ability to define the status of the current budget. e.g. progress, review, not complete and complete



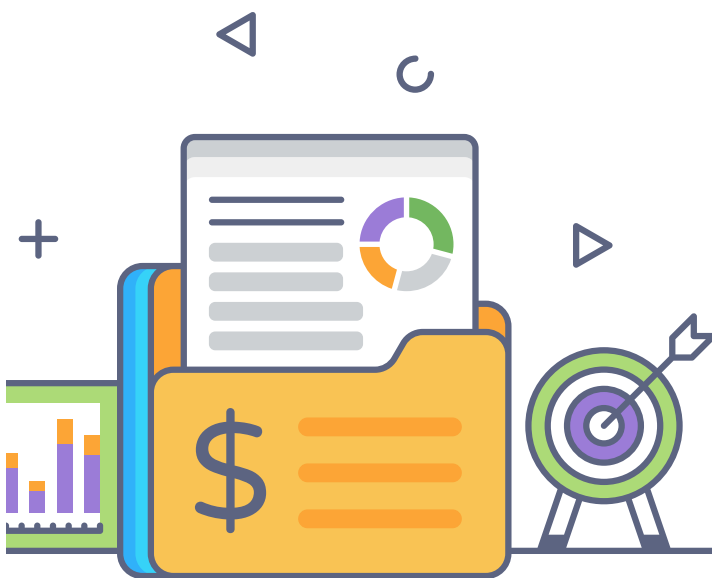
CUSTOMISATION

If security allows, a user is able to change the component values or percentages per customer and product while capturing the budget. This allows for individual customer discount percentages and product pricing.

Users are also able to add additional customers in the user module by cloning selected customers. The new customer will inherit the same product relationships.

INSIGHTS TO DRIVE YOUR DECISION MAKING

REAL-TIME ACCESS TO ACCURATE DATA AUTOMATICALLY CONSOLIDATED FROM VARIOUS SOURCES.



The IDU Sales Reporting Module offers detailed insight into sales performance through the real-time aggregation analysis by product, sales representative, region, and customer.

When your planning assumptions are rooted in data, it's easier to identify trends and variances and make better decisions.

IDU-Concept provides a single version of the truth to all involved in the sales planning process, giving insight, and enabling empowered decision making.

The IDU-Concept Sales Reporting Module is a two-way interface between the budget and revenue ledger systems.

It allows for real-time interaction with revenue data and enables users to comment on and analyse variances between anticipated revenue outcomes and those that have actually transpired.

The module builds on the advances achieved through the IDU-Concept Sales Planning interface, and enables the reporting of daily, weekly and monthly sales information to managers via the web.

With change happening faster than ever, creating a sales plan looking five years in the future might seem impossible.

Using the IDU Sales Planning and Reporting Modules, if you are asked “What do the next five years look like?” you will have a starting point and method to deliver the answer.

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SEAMLESS INTEGRATION

IDU-Concept integrates seamlessly with your underlying CRM and ERP systems to automatically pull in large amounts of transactional data.



DRILL DOWN

Drill down from the highest level down to individual customers and products.

This gives users and managers the ability to analyse the revenue performance on a daily basis and identify and rectify any business areas that are responsible for major variances.

Tolerances can be set to highlight only adverse variances that exceed a tolerance level in both percentage or value terms.



COMPARE & COMMENT

Compare multiple sets of data and easily conduct variance analyses as well as comment on variances based on user-defined levels.

This module allows for the analysis of variance between actual revenue and the budget, comparative years and forecasts by customer and product

It also allows for comment on anticipated sales outcomes versus actual sales within a multi-dimensional environment.



EXCEL INTEGRATION

Create custom Excel report packs for management and sales teams to easily extract daily, weekly, and monthly reports as required.



ADMINISTRATOR DEFINED

The system administrator has the ability to create multiple product and customer hierarchies. These can be viewed online and reported against, thereby eliminating the need to develop many reports for the various revenue reporting requirements.

They are also able to define multiple user-specific screen layouts, and user specific reporting profiles thereby creating different views and reports specific to individual requirements.



DASHBOARDS AND RATIOS

IDU Dashboards can be used to monitor critical information at a glance.



ANALYTICS

In addition to the standard IDU reports, customised SQL Reporting Services reports can be written to meet your specific reporting requirements.

The Sales Reporting Module also has built-in analytics capabilities. These are powered by Microsoft Power Pivot, PowerView, and PowerBI and deliver true slice-and-dice facilities around the information held within the IDU database. Information can be viewed graphically and is easily customised to meet the specific needs of individual clients.

This intuitive toolset of dashboards provides a 360-degree view of the data within the IDU database, putting the most important metrics in one place, in real-time, and across devices.



MODULAR AND SCALABLE

Available in Enterprise or Standard editions with varying levels of functionality and complexity to meet your company's specific requirements.

Organisations wishing to access greater functionality to meet growing or changing requirements can do so with ease.

FEATURES