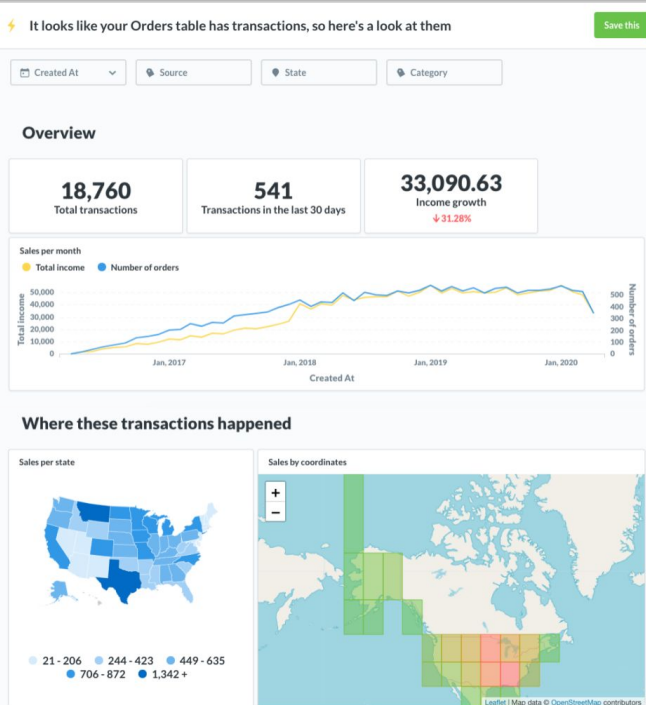


# Introducing: Cetec ERP BI

October 17, 2019

**CETEC** ERP

# What Is Cetec ERP BI?



- Web-based custom business intelligence (BI) reporting platform
- Transforms your ERP data into a reporting playground so you can build your own dashboards and KPIs
- Freedom to see your business data how you want to see it

# Cetec ERP BI: Powered by Metabase

Metabase is the **easy, open source** way for **everyone in your company** to **ask questions and learn from data.**

Get started



## Ask your own questions

### Explore on your own

Easily filter and group your data to find just what you're looking for, all without ever writing a line of sql or having to wait on a co-worker.

### See connections

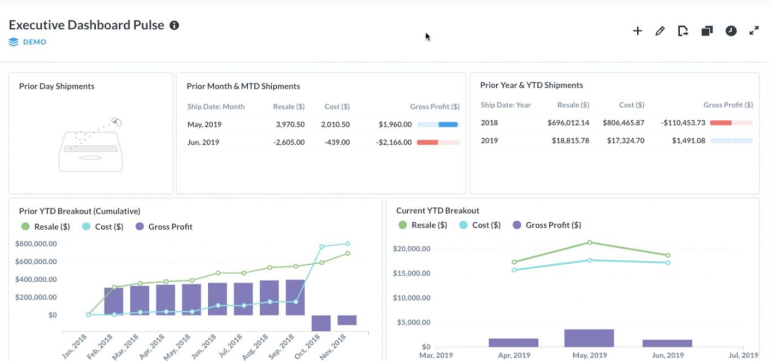
It just takes a click to see individual records and explore connections between your data, so you can move from *who*, to *what* effortlessly.

### Visualize results

Move from your data to beautiful graphs and charts with just a few clicks.

- Philosophically aligned (Cetec ERP is powered by Linux, MySQL, and Metabase)
- SaaS means you don't have to worry about maintaining your own analytics platform.
- Open source means: radically less expensive than Microsoft Power BI.

# Why Cetec ERP BI?



- Most small businesses rely on canned reports and Excel (and that's fine and plenty).
- Cetec ERP BI is for data nerds; it replaces time-consuming Excel macros & pivot tables.
- Ultimately: a multiplier on management time and insight (if you're into that sort of thing).

# How Does It Work?

Here is an example of a “canned” customer sales history report in Cetec ERP


## Invoice List

[Create Bill Only Invoice](#)

Customer   Invoice #  Cust PO





Invoice Date  -  Date Type  Intercompany

Prupart   Cust Part  Location

 View By  More Options

Note: Some columns are excluded on exports of > 1000 rows. Consolidated invoices can be accessed by clicking on a Customer, then selecting "Consolidated Invoices" from the side bar.

Displaying 1 - 7 of 7 [Export](#) +/- Columns

Invoice	Customer	Cust PO	Ext Cost	Ext Resale	Total	GM	Print?
75.1-1 	Internal Account		\$41.68	\$41.68	\$41.68		<input type="checkbox"/>
74.2-1 	Internal Account		\$3,562.13	\$101.73	\$101.73	-3401 %	<input type="checkbox"/>
74.1-1 	Internal Account		\$3,680.92	\$197.56	\$197.56	-1763 %	<input type="checkbox"/>
74.3-1 	Internal Account		\$3,500.40	\$100.42	\$100.42	-3385 %	<input type="checkbox"/>

# How Does It Work?

**There are other ways to see sales history (other than invoice by invoice)**

Example:

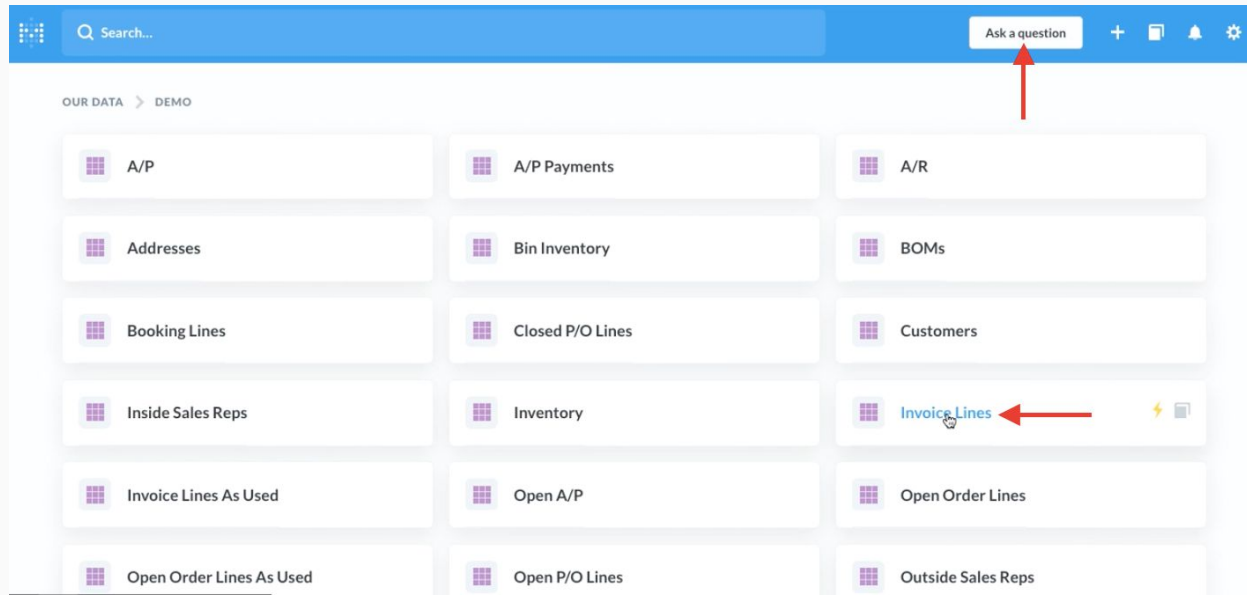
- Sum total of revenue
- Grouped by customer (who are my highest revenue generating customers?)
- Broken out by month over the past 12 months

There are vastly different angles to see this data to help you run your business.

**Cetec ERP BI lets you explore those angles.**

# How Does It Work?

This is why Cetec ERP BI exists. To let you ask new questions of your data.



# How Does It Work?

Move columns around to change presentation of raw data:

The screenshot displays a data visualization interface. On the left, a 'Columns' panel is open, showing a list of 'Visible columns'. The 'Invoice Number' column is circled in red, indicating it is being interacted with. The data table on the right shows the following columns: Customer, Customer Part Number, Ext Actual Labor, Ext Cost, Ext Estimated Labor, and Inv. The data rows are as follows:

Customer	Customer Part Number	Ext Actual Labor	Ext Cost	Ext Estimated Labor	Inv
Exxon		100	70.6	0	Mt
Apple		100	60.6	0	Mt
Apple		0	4	0	Mt
Apple		0	0.1	0	Mt
Apple		0	0.15	0	Mt
Exxon		100	43.93	0	Mt
Exxon		0	0.25	0	Mt
Exxon		0	0.6	0	Mt
Build-For-Stock Programs		500	178.67	0	Mt
Apple		0	5	0	Mt



# How Does It Work?

Move columns around to change presentation of raw data:

The screenshot shows a data analysis tool interface. At the top, there is a search bar and an "Ask a question" button. Below that, the "New question" section includes a "DATA" dropdown set to "Invoice Lines", a "FILTERED BY" section with "Add filters to narrow your answer", a "VIEW" dropdown set to "Raw data", and a "GROUPED BY" section with "Add a grouping". A "Get Answer" button is prominently displayed. The visualization is set to "Table" and shows 367 rows. The table below has the following columns and data:

Invoice Number	Customer	Customer Part Number	Ext Actual Labor	Ext Cost	Ext Estimated Labor	Ext Labor Variance	Ext Margin	Ext Resale	Fob P
MN1.1-1	Exxon		100	70.6	0	24.31	84.94	155.54	S
MN3.1-1	Apple		100	60.6	0	-2.08	19,939.4	20,000	S
MN7.1-1	Apple		0	4	0	0	996	1,000	S
MN7.1-1	Apple		0	0.1	0	0	1.9	2	S
MN7.1-1	Apple		0	0.15	0	0	2.85	3	S
MN5.1-1	Exxon		100	43.93	0	14.58	111.61	155.54	S

# How Does It Work?

Change “view by” to focus in on the metric you want to focus on:

The screenshot shows a data visualization tool interface. At the top, there is a search bar and a "Ask a question" button. Below that, the "New question" section displays the current data source as "Invoice Lines" and the view as "Raw data". The "FILTERED BY" section shows filters for "Customer" (No) and "Ship Date" (Previous Year). The "VISUALIZATION" section shows a table view with columns for Invoice Number, Customer, Customer Part Number, Estimated Labor, Ext Labor Variance, Ext Margin, Ext Resale, and Fob P. A dropdown menu is open over the table, showing a search bar with "ext" entered and a list of metrics: Ext Actual Labor, Ext Cost, Ext Estimated Labor, Ext Labor Variance, Ext Margin, and Ext Resale. A red arrow points to the "Ext Resale" option, which is highlighted in green. The table shows 367 rows of data.

Invoice Number	Customer	Customer Part Number	Estimated Labor	Ext Labor Variance	Ext Margin	Ext Resale	Fob P
MN1.1-1	Exxon		0	24.31	84.94	155.54	\$
MN3.1-1	Apple		0	-2.08	19,939.4	20,000	\$
MN7.1-1	Apple		0	0	996	1,000	\$
MN7.1-1	Apple		0	0	1.9	2	\$
MN7.1-1	Apple		0	0	2.85	3	\$
MN5.1-1	Exxon		0	14.58	111.61	155.54	\$
MN5.1-1	Exxon		0	0	14.75	15	\$
MN9.1-1	Exxon		0	39.58	154.94	155.54	\$
			0	72.92	0	178.67	\$

# How Does It Work?

Change “view by” to focus in on the metric you want to focus on:

The screenshot shows a data query interface with the following components:

- Search Bar:** A blue bar at the top with a search icon and the text "Search...".
- Ask a question:** A button with a plus sign, a document icon, a bell icon, and a gear icon.
- New question:** A section with a "SAVE" button and icons for sharing, printing, and a menu.
- DATA:** A dropdown menu showing "Invoice Lines".
- FILTERED BY:** A section with two filters: "Customer" (set to "No") and "Inter Company? is" (set to "Previous Year").
- VIEW:** A dropdown menu showing "Sum of Ext Resale".
- GROUPED BY:** A section with a dropdown menu showing "Add a grouping".
- VISUALIZATION:** A section with a "Number" visualization type and a "Refresh" button.

A red arrow points from the "VIEW" dropdown to the large blue number "714,827.92" displayed below the interface.

# How Does It Work?

Organize data on primary groupings (e.g. sales *by customer*)

The screenshot shows a data visualization tool interface. At the top, there is a search bar and an "Ask a question" button. Below this, the "New question" section is visible. The "DATA" section shows "Invoice Lines" selected. The "FILTERED BY" section includes "Customer" (set to "No") and "Ship Date" (set to "Previous Year"). The "VIEW" section shows "Sum of Ext Resale". The "GROUPED BY" section has a dropdown menu open, showing "Invoice Line" selected and "Customer" expanded. A red arrow points to the "GROUPED BY" section, and another red arrow points to the "Customer" dropdown. A third red arrow points to the "Aa Name" option in the dropdown. The "VISUALIZATION" section shows "Number" selected. A large number "714,82" is overlaid on the bottom left of the interface.

# How Does It Work?

Organize data on secondary groupings (e.g. sales *by customer, by ship date month*)

The screenshot shows a data visualization tool interface. At the top, there is a search bar and an "Ask a question" button. Below this, the "New question" section is visible. The "DATA" section is set to "Invoice Lines". The "FILTERED BY" section includes "Customer" (set to "No") and "Ship Date" (set to "Previous Year"). The "VIEW" section shows "Sum of Ext Resale". The "GROUPED BY" section is set to "Customer" and "Name". A red arrow points to the "+" icon next to "Name".

The "VISUALIZATION" section is set to "Number". A large number "714,827.92" is displayed in the center of the interface.

A dropdown menu is open for "Ship Date", showing options for "by month", "Minute", "Hour", "Day", "Week", "Month", "Quarter", "Year", "Minute of hour", and "Hour of day". A red arrow points to the "Month" option.

# How Does It Work?

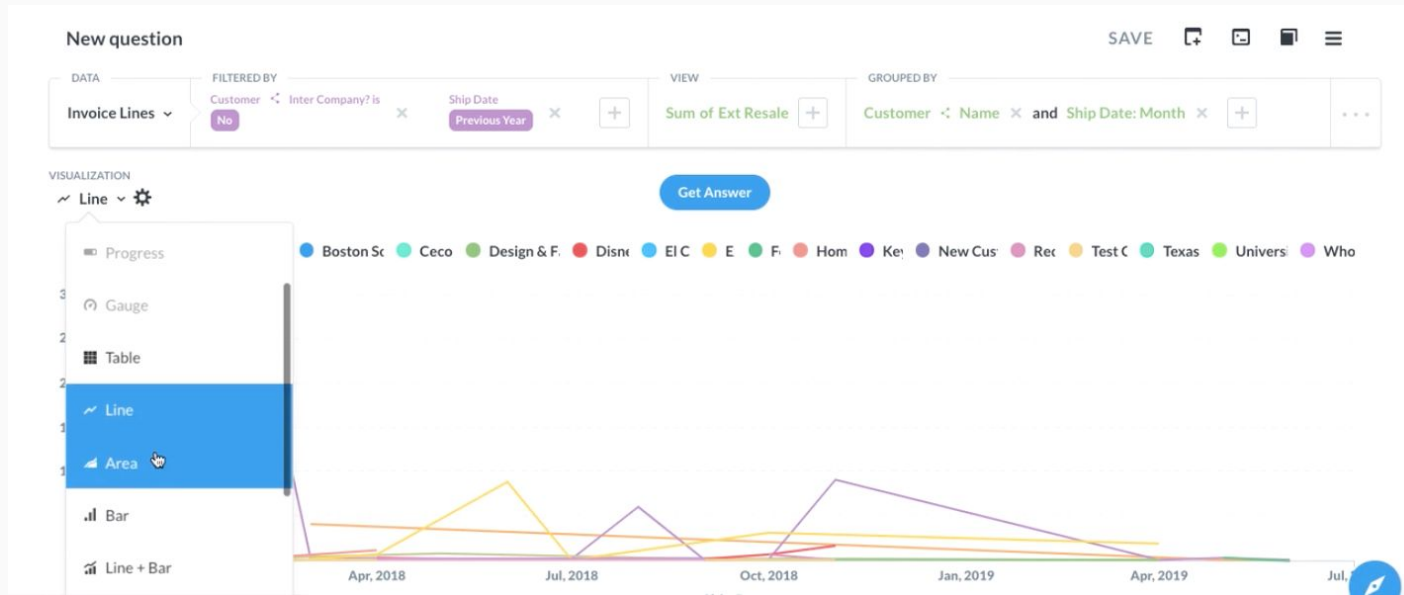
Result: newly organized data! (revenue by customer by month)

The screenshot shows a data visualization tool interface. At the top, there is a search bar and an "Ask a question" button. Below this, the "New question" section displays the query configuration: DATA is "Invoice Lines", FILTERED BY includes "Customer" (No) and "Ship Date" (Previous Year), VIEW is "Sum of Ext Resale", and GROUPED BY is "Customer Name and Ship Date: Month". The visualization is set to "Table" view, showing 54 rows. The table below displays revenue data for various customers from January 2018 to October 2018.

Name	January, 2018	February, 2018	March, 2018	April, 2018	May, 2018	June, 2018	July, 2018	August, 2018	September, 2018	October, 2018
24 Hour Fitness					1,050				2,000	
ABC Shirts			40,100							
Apple	500	315,593	2,462.51			900	100	60,000	0	
Boeing	0				7,441.6				650	
Boston Scientific Corp.										
Ceco Building				500						
Design & Fab Contractors										
Disney World				2,500	500				244.77	5,16

# How Does It Work?

Change the way the data is visualized (line graph, table, etc.) for your KPI



# How Does It Work?

Change the way that content within cells are formatted (e.g. \$ signs, etc.)

The screenshot displays a Microsoft Power BI interface. On the left, a configuration panel for a table is open, showing various formatting options. The 'Unit of currency' is set to 'US Dollar'. Under 'Currency label style', the 'Symbol (\$)' option is selected. Under 'Where to display the unit of currency', the 'In every table cell' option is selected. The 'Separator style' is set to '100,000.00'. On the right, a table of data is visible, with a red arrow pointing to the value '\$2,000.00' in the second row, second column.

24 Hour Fitness	May, 2018	\$1,050.00
24 Hour Fitness	Sep, 2018	\$2,000.00
24 Hour Fitness	Oct, 2018	\$46.00
24 Hour Fitness	Nov, 2018	-\$5.00
ABC Shirts	Mar, 2018	\$40,100.00
ABC Shirts	May, 2019	\$70.50
ABC Shirts	Jun, 2019	-\$1,003.00
Apple	Jan, 2018	\$500.00
Apple	Feb, 2018	\$315,593.00
Apple	Mar, 2018	\$2,462.51
Apple	Jun, 2018	\$900.00
Apple	Jul, 2018	\$100.00
Apple	Aug, 2018	\$60,000.00
Apple	Sep, 2018	\$0
Apple	Oct, 2018	\$155.00
Apple	Nov, 2018	\$91,000.00
Apple	Apr, 2019	\$0
Apple	May, 2019	\$1,400.00
Apple	Jun, 2019	-\$101.00



# How Does It Work?

Change the names of the columns that are presented on the dashboards

The screenshot shows a configuration window for a dashboard table. The window has two tabs: "Columns" (selected) and "Conditional Formatting". The "Columns" tab is active, showing a list of columns and their values. The "Column title" field is highlighted with a yellow box, and a red arrow points to it from the left. The "Resale" column is highlighted with a yellow box, and a red arrow points to it from the right. The "Unit of currency" is set to "US Dollar" and the "Currency label style" is set to "Symbol (\$)".

Name	Ship Date: Month	Resale
24 Hour Fitness	May, 2018	\$1,050.00
24 Hour Fitness	Sep, 2018	\$2,000.00
24 Hour Fitness	Oct, 2018	\$46.00
24 Hour Fitness	Nov, 2018	-\$5.00
ABC Shirts	Mar, 2018	\$40,100.00
ABC Shirts	May, 2019	\$70.50
ABC Shirts	Jun, 2019	-\$1,003.00
Apple	Jan, 2018	\$500.00
Apple	Feb, 2018	\$315,593.00
Apple	Mar, 2018	\$2,462.51
Apple	Jun, 2018	\$900.00
Apple	Jul, 2018	\$100.00
Apple	Aug, 2018	\$60,000.00
Apple	Sep, 2018	\$0
Apple	Oct, 2018	\$155.00

# How Does It Work?

## Auto-pivoting of preferred data groupings (example 1)

The screenshot shows the Microsoft Excel interface with the PivotTable task pane open. The task pane is titled "Columns" and "Conditional Formatting". Under "Pivot the table", the toggle is turned on. Under "Pivot column", the dropdown menu is open, showing "Name" selected. The data table below has columns for "Ship Date: Month" and "Name" (24 Hour Fitness, ABC Shirts, Apple, Boeing, Boston Scientific Corp., Ceco Building). Red arrows point to the "Pivot the table" toggle, the "Name" selection in the dropdown, and the column headers in the table.

Ship Date: Month	24 Hour Fitness	ABC Shirts	Apple	Boeing	Boston Scientific Corp.	Ceco Building
Jan, 2018	-	-	\$500.00	\$0	-	-
Feb, 2018	-	-	\$315,593.00	-	-	-
Mar, 2018	-	\$40,100.00	\$2,462.51	-	-	-
Apr, 2018	-	-	-	-	-	\$500.00
May, 2018	\$1,050.00	-	-	\$7,441.60	-	-
Jun, 2018	-	-	\$900.00	-	-	-
Jul, 2018	-	-	\$100.00	-	-	-
Aug, 2018	-	-	\$60,000.00	-	-	-
Sep, 2018	\$2,000.00	-	\$0	\$650.00	-	-
Oct, 2018	\$46.00	-	\$155.00	-	-	-

# How Does It Work?

## Auto-pivoting of preferred data groupings (example 2)

The screenshot shows the Microsoft Excel interface with the PivotTable task pane open. The task pane has two tabs: 'Columns' and 'Conditional Formatting'. The 'Columns' tab is active. Under 'Pivot the table', there is a toggle switch that is turned on. A red arrow points to this toggle. Under 'Pivot column', there is a dropdown menu with 'Ship Date' selected. A red arrow points to this dropdown. The main area of the spreadsheet shows a PivotTable with the following data:

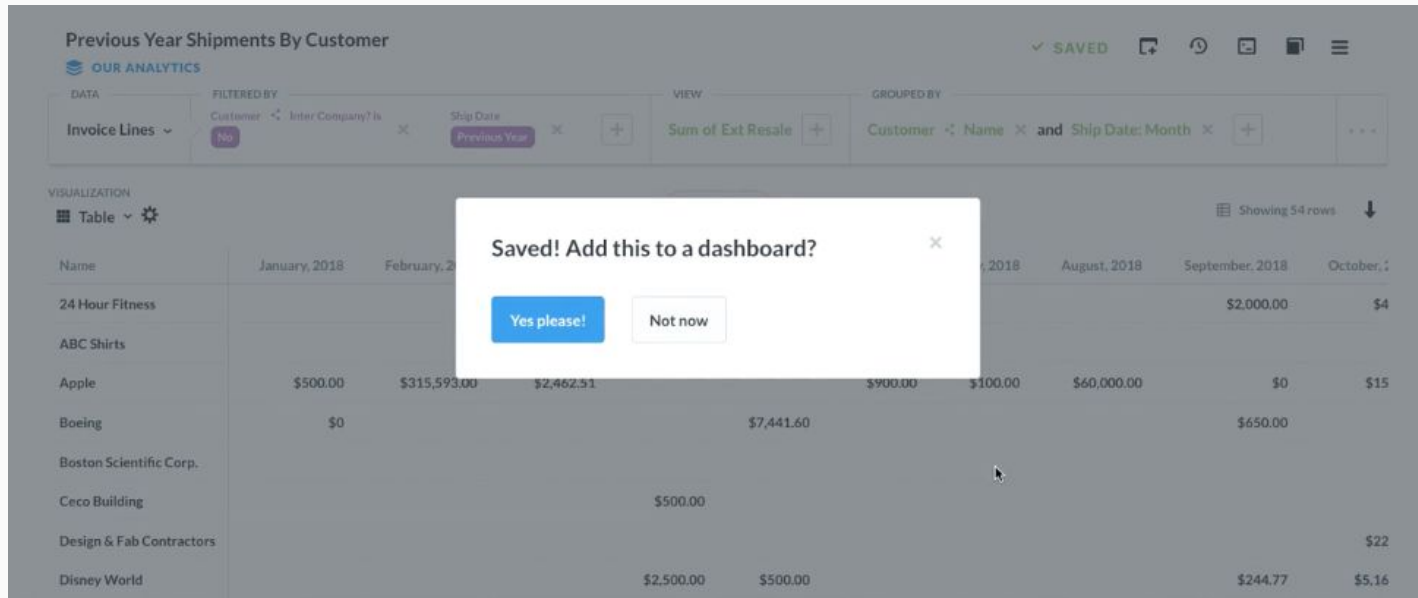
Name	January, 2018	February, 2018	March, 2018	April, 2018	May, 2018	June, 2018
24 Hour Fitness	-	-	-	-	\$1,050.00	-
ABC Shirts	-	-	\$40,100.00	-	-	-
Apple	\$500.00	\$315,593.00	\$2,462.51	-	-	\$900.00
Boeing	\$0	-	-	-	\$7,441.60	-
Boston Scientific Corp.	-	-	-	-	-	-
Ceco Building	-	-	-	\$500.00	-	-
Design & Fab Contractors	-	-	-	-	-	-
Disney World	-	-	-	\$2,500.00	\$500.00	-
El Cosmico	-	-	-	-	-	-
Exxon	-	-	\$500.00	\$6,000.00	-	\$87,778.75

At the bottom of the task pane, there is a 'Reset to defaults' link, a 'Cancel' button, and a 'Done' button. The status bar at the bottom right of the spreadsheet shows 'Rows 1-10 of 19'.



# How Does It Work?

## Build Out Your Own Company Dashboards



# How Does It Work?

## Build Out Your Own Company Dashboards

### Executive Dashboard Pulse ?

DEMO



#### Prior Day Shipments



#### Prior Month & MTD Shipments

Ship Date: Month	Resale (\$)	Cost (\$)	Gross Profit (\$)
May, 2019	3,970.50	2,010.50	\$1,960.00
Jun, 2019	-2,605.00	-439.00	-\$2,166.00

#### Prior Year & YTD Shipments

Ship Date: Year	Resale (\$)	Cost (\$)	Gross Profit (\$)
2018	\$696,012.14	\$806,465.87	-\$110,453.73
2019	\$18,815.78	\$17,324.70	\$1,491.08

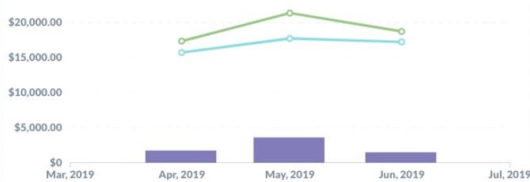
#### Prior YTD Breakout (Cumulative)

● Resale (\$) ● Cost (\$) ● Gross Profit



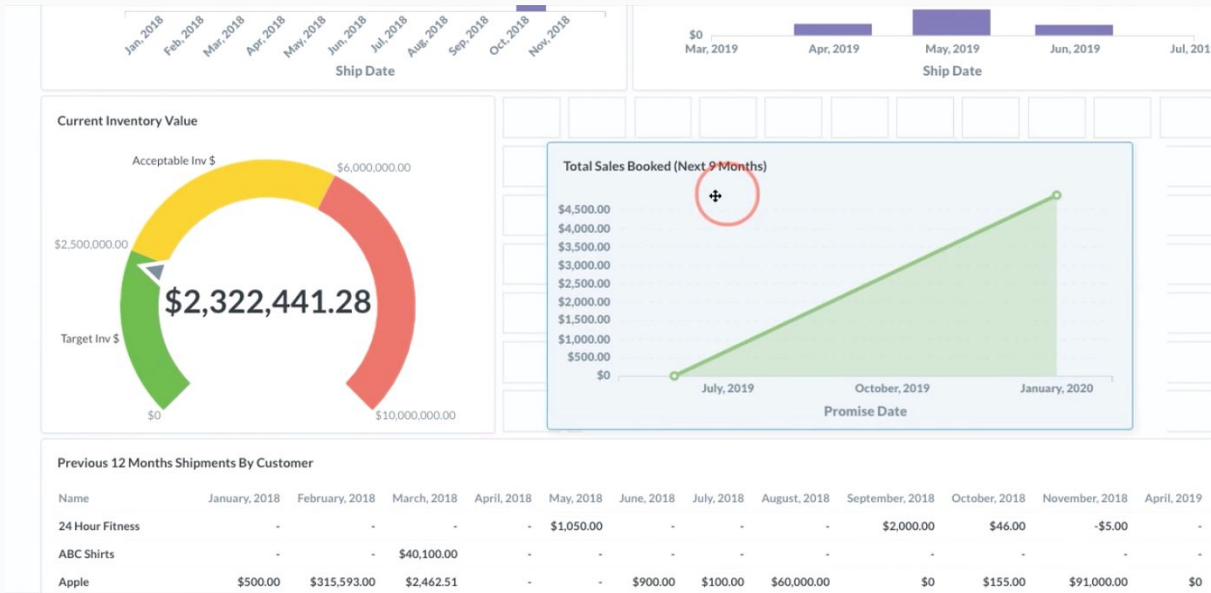
#### Current YTD Breakout

● Resale (\$) ● Cost (\$) ● Gross Profit (\$)



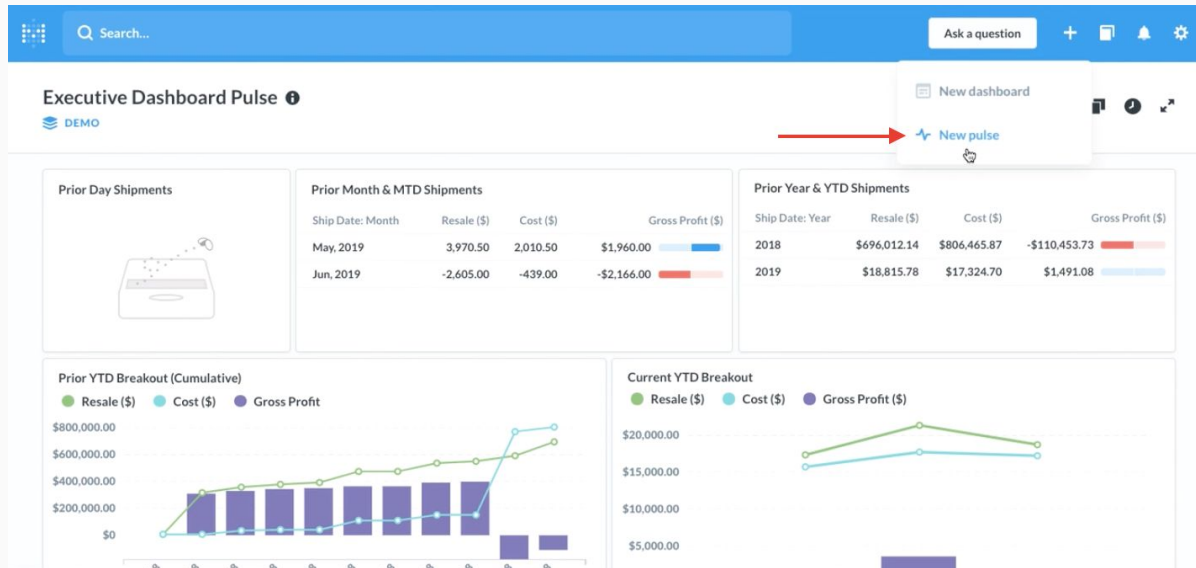
# How Does It Work?

## Build Out Your Own Company Dashboards



# Other Features

## Set A "Pulse" Email Alert





# Other Features

## Set A “Pulse” Email Alert

### New pulse

#### Name your pulse

Give your pulse a name to help others understand what it's about.

#### Which collection should this pulse live in?

#### Pick your data

Choose questions you'd like to send in this pulse.

1.

### Where should this data go?

Email



To:

Enter email addresses you'd like this data to go to

Sent

at

Emails will be sent at 8:00 AM CDT, your Metabase timezone.

Slack



# Other Features

Drill down into the source data.

The screenshot shows a data visualization interface with a blue header bar containing a search box and utility icons. Below the header, a question is defined: "New question started from Prior YTD Breakout (Cumulative)". The data source is "Invoice Lines", filtered by "Customer" (No), "Inter Company?" (is), and "Ship Date: Month is" (April, 2018). The visualization is a table with columns for "Ship Date: Week", "Sum", "Sum", and "Sum". The first row shows data for "Apr 1, 2018 - Apr 7, 2018" with values 10,400, 400, and 10,000. A context menu is open over the 10,400 cell, with red arrows pointing to the "Zoom in" and "View these Invoice Lines" options.

SEARCH: Search...    Ask a question    +    📄    🔔    ⚙️

**New question** started from Prior YTD Breakout (Cumulative)    SAVE    📄    📄    ☰

DATA: Invoice Lines    FILTERED BY: Customer: No, Inter Company?: is, Ship Date: Month is: April, 2018    VIEW: Cumulative sum of Ext Resale, and Cumulative sum of Ext Cost, and Cumulative sum of Ext Margin

VISUALIZATION: Table ⚙️    Refresh    Showing 3 rows ↓

Ship Date: Week	Sum	Sum	Sum
Apr 1, 2018 - Apr 7, 2018	10,400	400	10,000
Apr 8, 2018 - Apr 14, 2018			
Apr 22, 2018 - Apr 28, 2018			

Context menu options:

- 🔍 Zoom in
- 📄 View these Invoice Lines
- 📊 Category Location
- ⚡ X-ray Compare to the rest

# Other Features

**SQL when you need it** - When you need to dig into the complicated stuff, Metabase provides an elegant SQL interface for people who need a little more power.

## SQL Parameters

Metabase has the flexible ability to allow variables in native (SQL) queries. This lets you dynamically replace values in your queries using filter widgets or through the query's URL.

### New question

🔍

This question is written in SQL.  ×

```
1 SELECT count(*)
2 FROM products
3 [[WHERE category = {{cat}}]]
```

# Cetec ERP BI

Powered by Metabase

**CETEC ERP BI PLATFORM**

**\$2000**

per month (flat)

ADVANCED DATA ANALYSIS AND REPORTING  
(INCLUDED IN CETEC ERP 'ENTERPRISE' PLAN).

[More Info?](#)

# Included In SaaS Plan

**ENTERPRISE PLAN**

**\$40**

per user, per month

5 STANDARD USER MINIMUM

+

**\$3200**

per month

(PER COMPANY, NOT PER USER)

Surprise!

We've set you up with a one  
month trial of Cetec ERP BI.

It is secure and already  
connected to your ERP database.

Check it out! See your data differently.

Thank you!