infigo

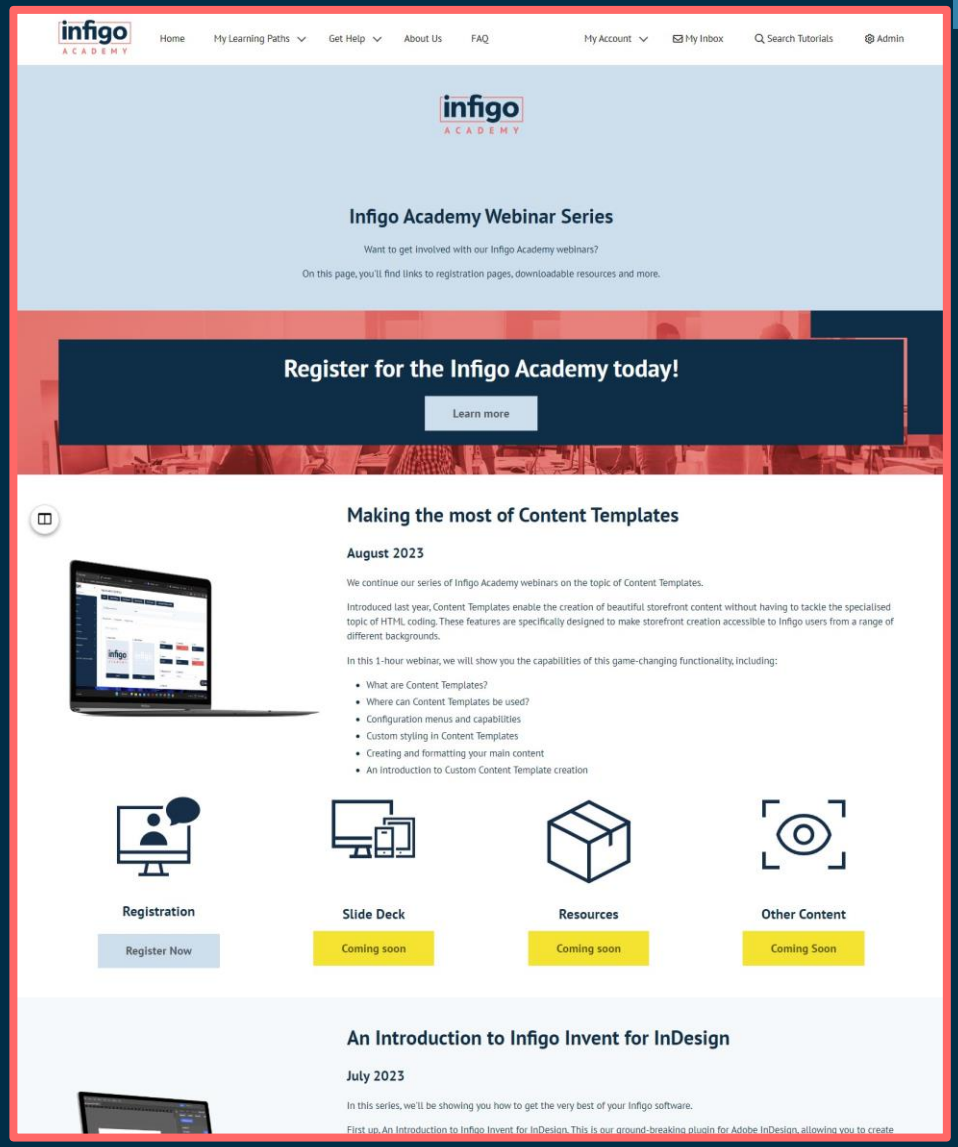
Infigo Insights
Reporting Tools

Resources for this webinar

Resources are available for viewing / download from the Infigo Academy from the following link:

https://training.infigosoftware.com/academy/t/WebinarResources

This link will also be placed in the chat.



Support Champion

- The current responsible team member for queries on Infigo Insights is James Thompson.

- James joined Infigo in August 2022 and has taken to his support role like a duck to water. James was the recipient of the coveted Rising Star award at our 2023 company event, in recognition of his skill and efforts.

- Send any Infigo Insights related queries via the usual Zendesk channels.

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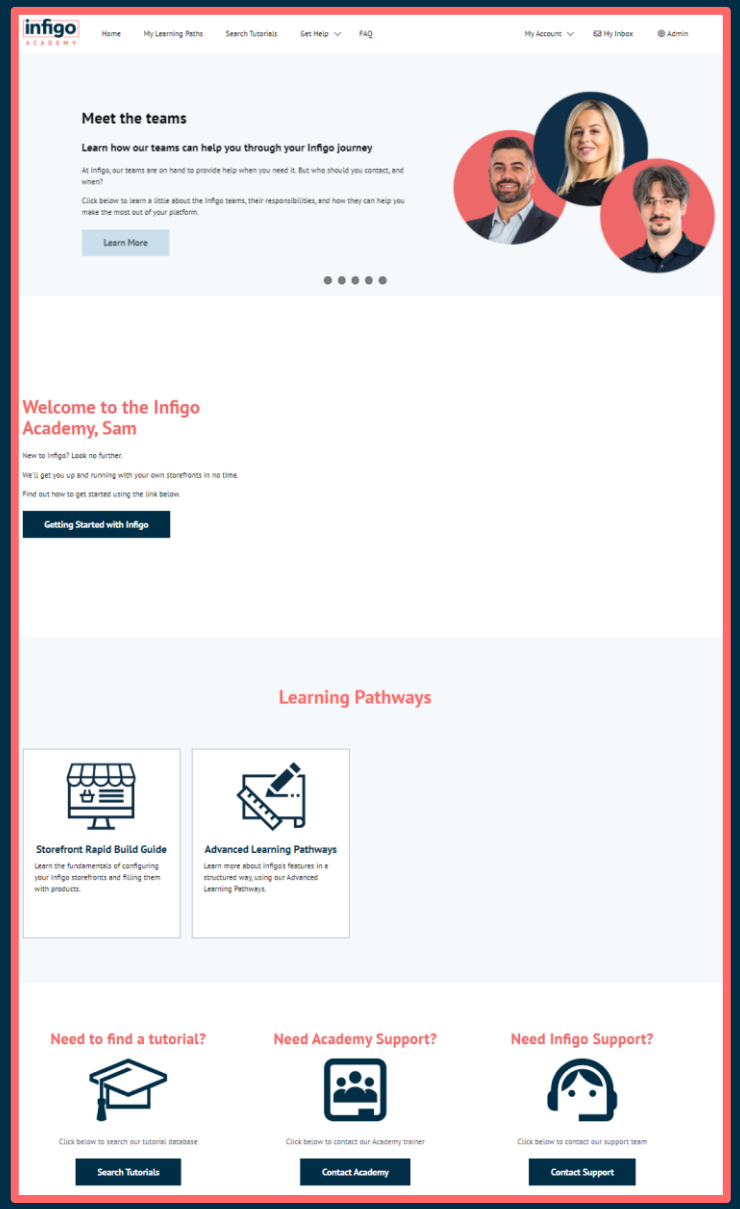
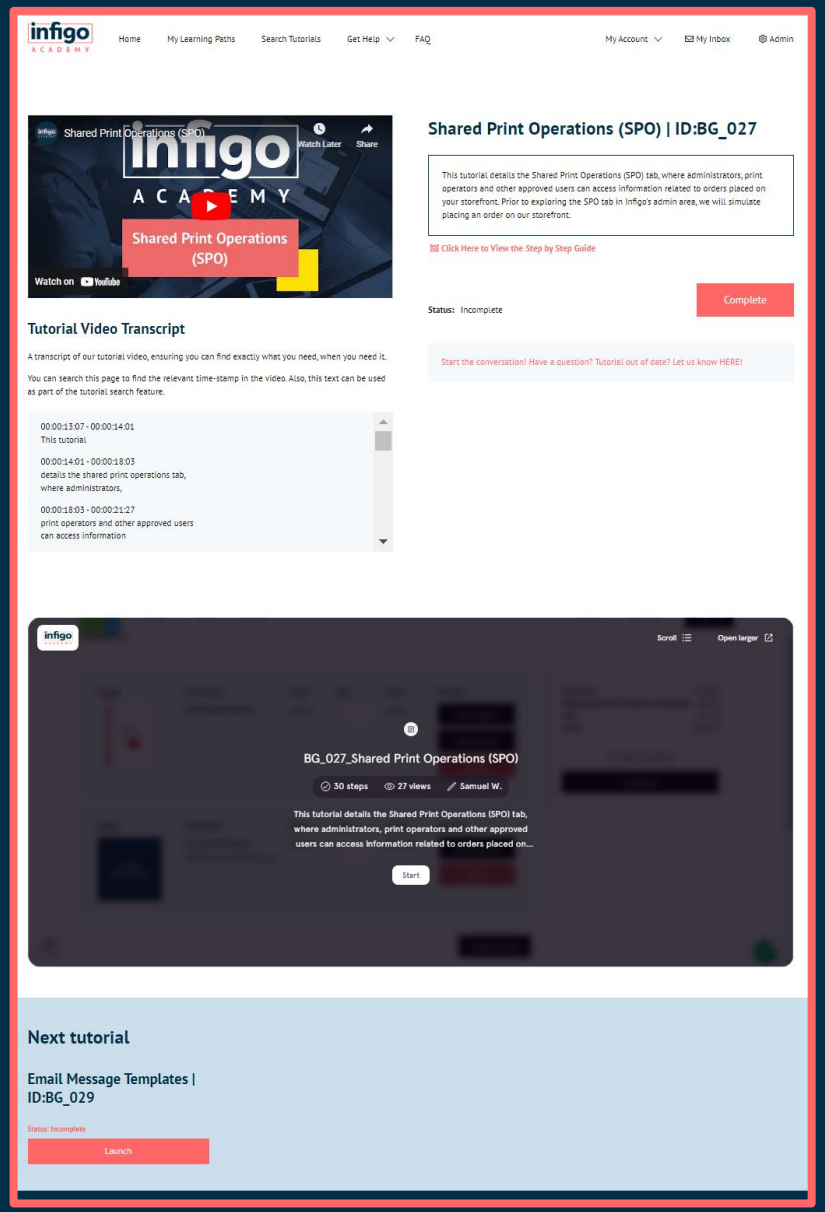


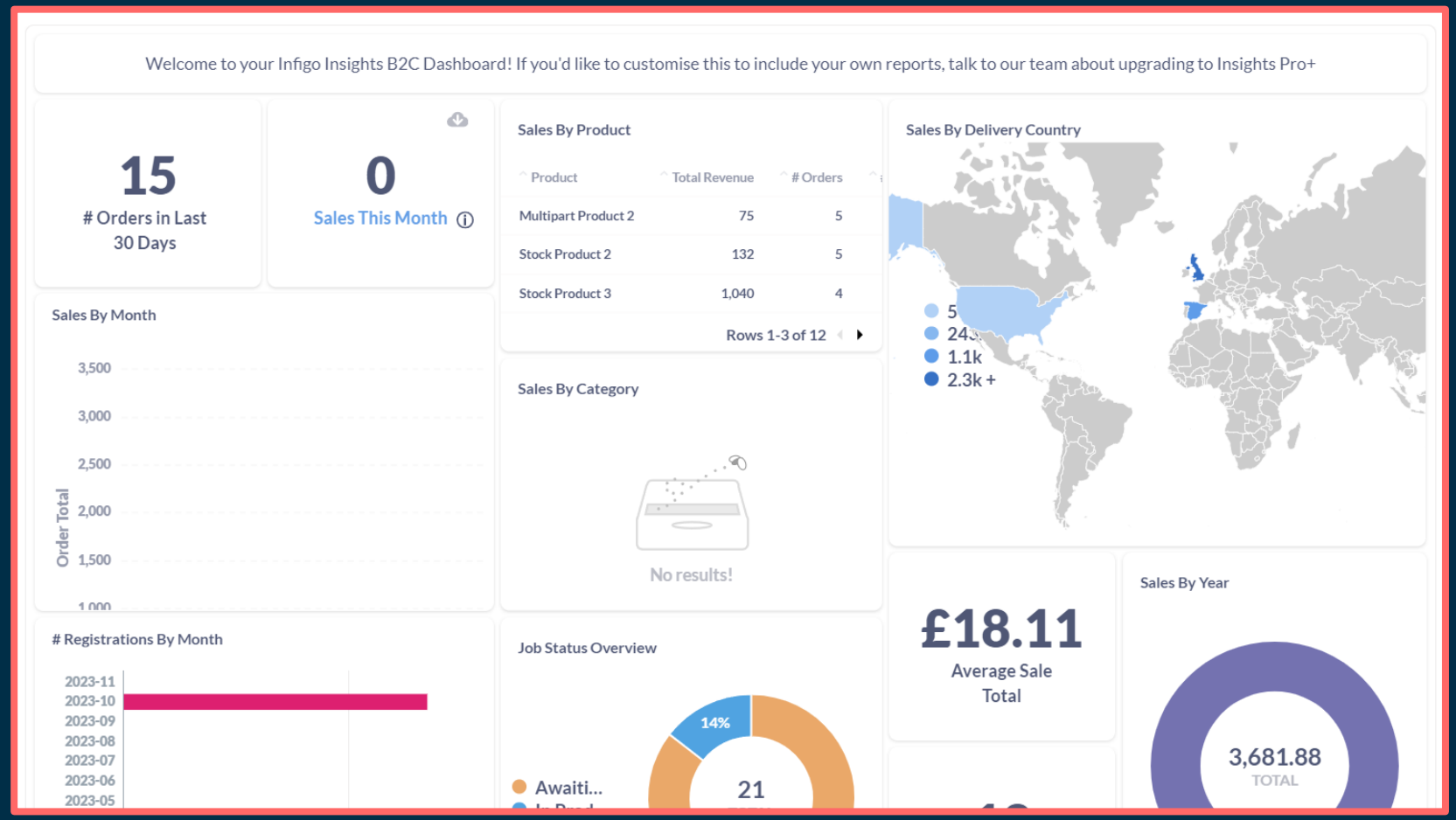


What is Infigo Insights?

A powerful, specialised set of reporting tools, allowing you to dig deep in to the data behind your Infigo storefronts.

Examine information such as order details, products, orderline, customers and much more.

Hosted on third party plarform, Metabase, and can operate inside Infigo admin.



Insights Plans Summary

Insights Overview
Standard
Pro
Pro+

Enterprise (contact us for more information)

Click the links above in the PDF for more information, or search on the Help Centre.

Here, we will take a general look at Infigo Insights, covering much of the available functionality spanning different Insights plans.

Infigo Insights Our reporting module

For more information, contact us on sales@infigo.net

Features	Out of the box	Pro	Pro+	Enterprise
Default reports	✓	✓	✓	✓
Default dashboards	✓	✓	✓	✓
Ability to create custom simple reports		✓	✓	✓
Ability to create custom advanced reports		✓	✓	✓
Ability to import custom reports into Infigo's platform		✓	✓	✓
Ability to create custom dashboards		✓	✓	✓
Ability to subscribe to email reports		✓	✓	✓
Ability to create SQL custom reports			✓	✓
Ability to modify default reports			✓	✓
Ability to modify default dashboards			✓	✓
Ability to import custom dashboards into Infigo's platform				✓
Dedicated installation and database				✓
Administrative controls				✓
Slack integration				✓
SSO (LDP, Google)				✓

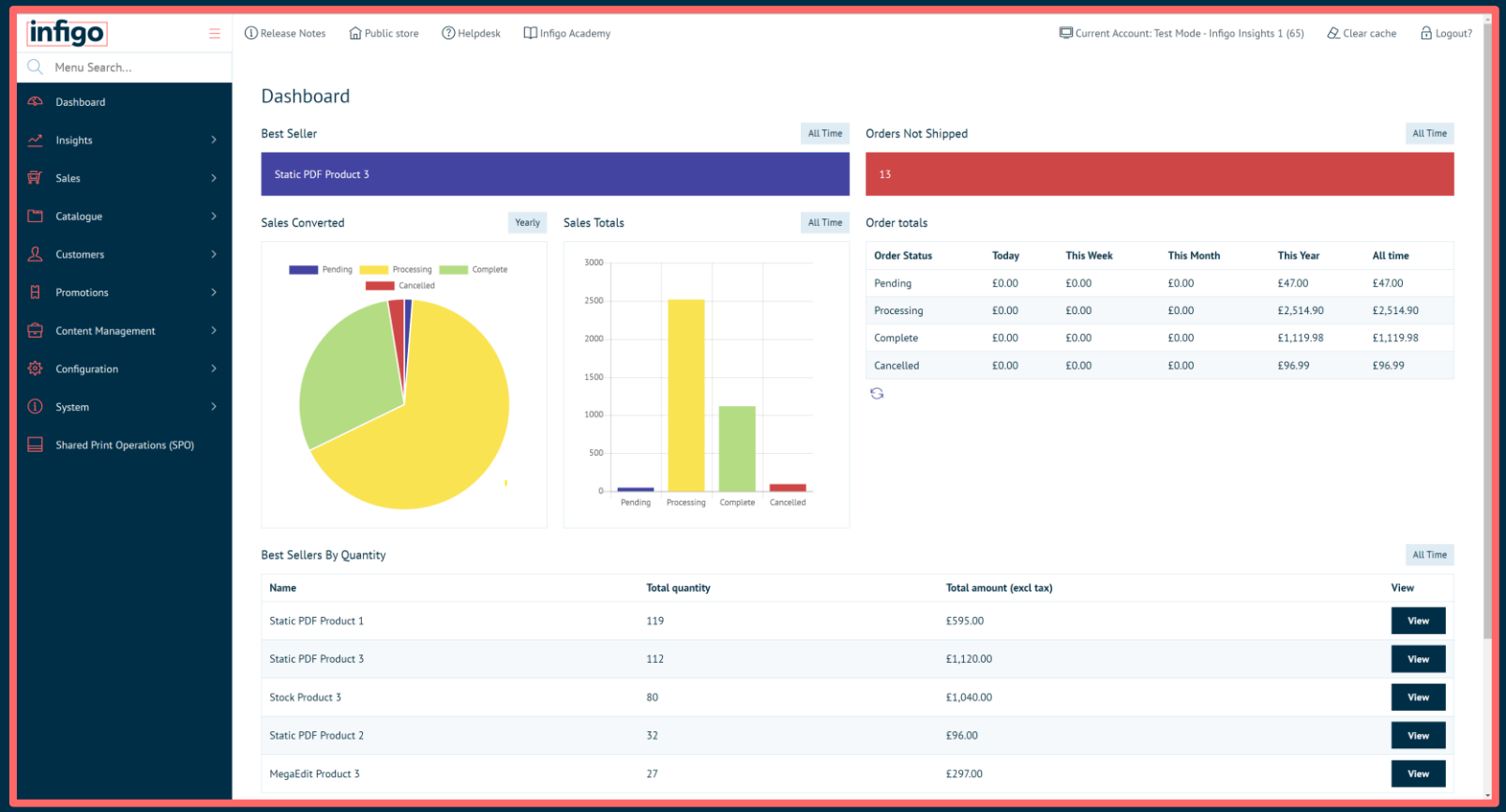
Limits				
Number of dedicated reporting users	0	2	5	100
Number of custom reports at Infigo's platform	0	5	20	100
Number of custom dashboards at Infigo's platform	0	0	0	10

Pricing				
Monthly payment	0	£150 / $210	£275 / $380	£599 / $830
One-off upfront payment	0	£295 / $410	£795 / $1100	£2995 / $4200

Legacy Reports and Main Dashboard

Standard, fixed reports available within your Infigo platform.

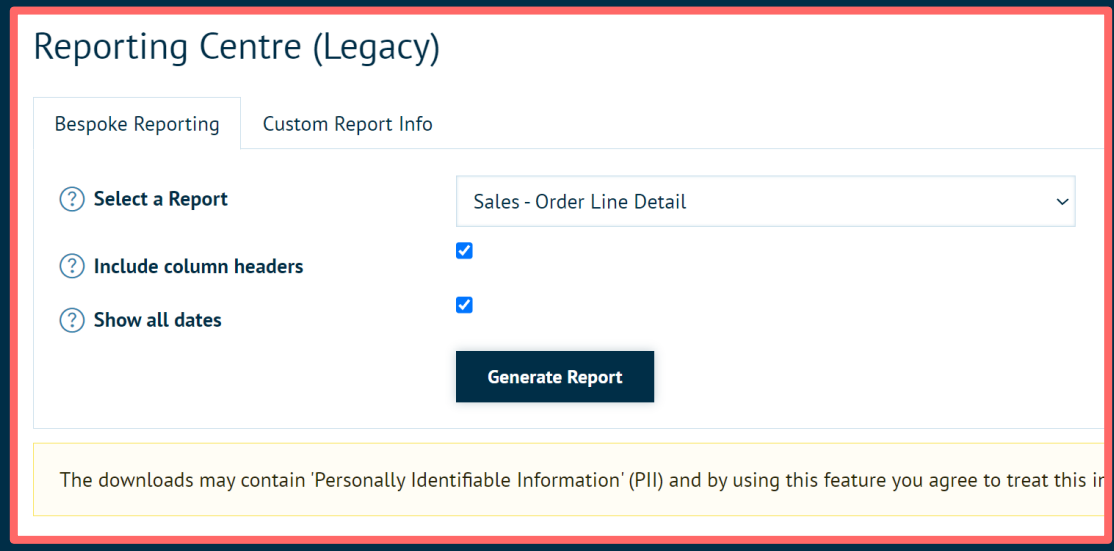
Main dashboard will provide a summary of the selected storefront.

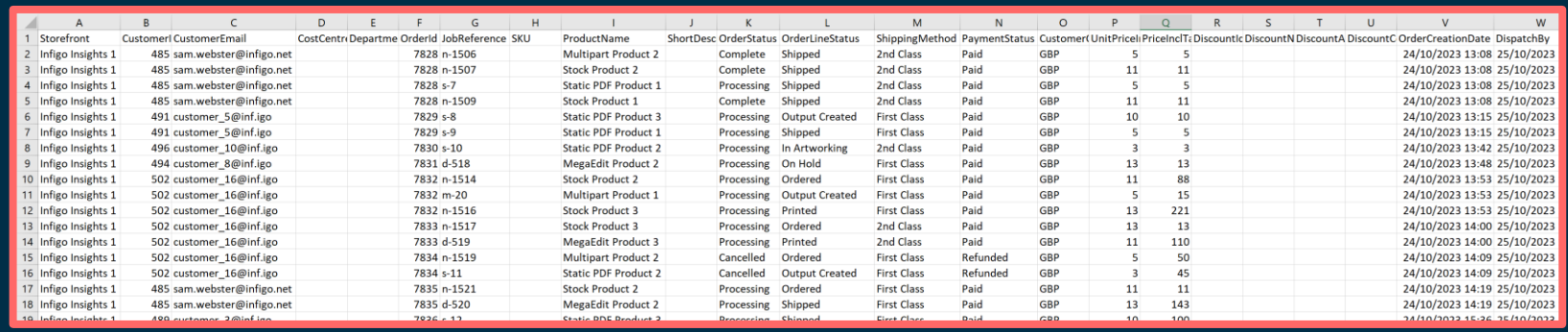


Legacy Reports and Main Dashboard

Standard, fixed reports available within your Infigo platform.

Legacy reports allow extraction of a select range of platform and storefront data.





	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	Storefront	CustomerI	CustomerEmail	CostCentr	Departme	OrderId	JobReference	SKU	ProductName	ShortDesc	OrderStatus	OrderLineStatus	ShippingMethod	PaymentStatus	CustomerC	UnitPriceE	PriceInclTa	DiscountIc	DiscountN	DiscountA	DiscountC	OrderCreationDate	DispatchBy
2	Infigo Insights 1	485	sam.webster@infigo.net			7828	n-1506		Multipart Product 2		Complete	Shipped	2nd Class	Paid	GBP	5	5					24/10/2023 13:08	25/10/2023
3	Infigo Insights 1	485	sam.webster@infigo.net			7828	n-1507		Stock Product 2		Complete	Shipped	2nd Class	Paid	GBP	11	11					24/10/2023 13:08	25/10/2023
4	Infigo Insights 1	485	sam.webster@infigo.net			7828	s-7		Static PDF Product 1		Processing	Shipped	2nd Class	Paid	GBP	5	5					24/10/2023 13:08	25/10/2023
5	Infigo Insights 1	485	sam.webster@infigo.net			7828	n-1509		Stock Product 1		Complete	Shipped	2nd Class	Paid	GBP	11	11					24/10/2023 13:08	25/10/2023
6	Infigo Insights 1	491	customer_5@inf.igo			7829	s-8		Static PDF Product 3		Processing	Output Created	First Class	Paid	GBP	10	10					24/10/2023 13:15	25/10/2023
7	Infigo Insights 1	491	customer_5@inf.igo			7829	s-9		Static PDF Product 1		Processing	Shipped	First Class	Paid	GBP	5	5					24/10/2023 13:15	25/10/2023
8	Infigo Insights 1	496	customer_10@inf.igo			7830	s-10		Static PDF Product 2		Processing	In Artworking	2nd Class	Paid	GBP	3	3					24/10/2023 13:42	25/10/2023
9	Infigo Insights 1	494	customer_8@inf.igo			7831	d-518		MegaEdit Product 2		Processing	On Hold	First Class	Paid	GBP	13	13					24/10/2023 13:48	25/10/2023
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11	Infigo Insights 1	502	customer_16@inf.igo			7832	m-20		Multipart Product 1		Processing	Output Created	First Class	Paid	GBP	5	15					24/10/2023 13:53	25/10/2023
12	Infigo Insights 1	502	customer_16@inf.igo			7832	n-1516		Stock Product 3		Processing	Printed	First Class	Paid	GBP	13	221					24/10/2023 13:53	25/10/2023
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14	Infigo Insights 1	502	customer_16@inf.igo			7833	d-519		MegaEdit Product 3		Processing	Printed	2nd Class	Paid	GBP	11	110					24/10/2023 14:00	25/10/2023
15	Infigo Insights 1	502	customer_16@inf.igo			7834	n-1519		Multipart Product 2		Cancelled	Ordered	First Class	Refunded	GBP	5	50					24/10/2023 14:09	25/10/2023
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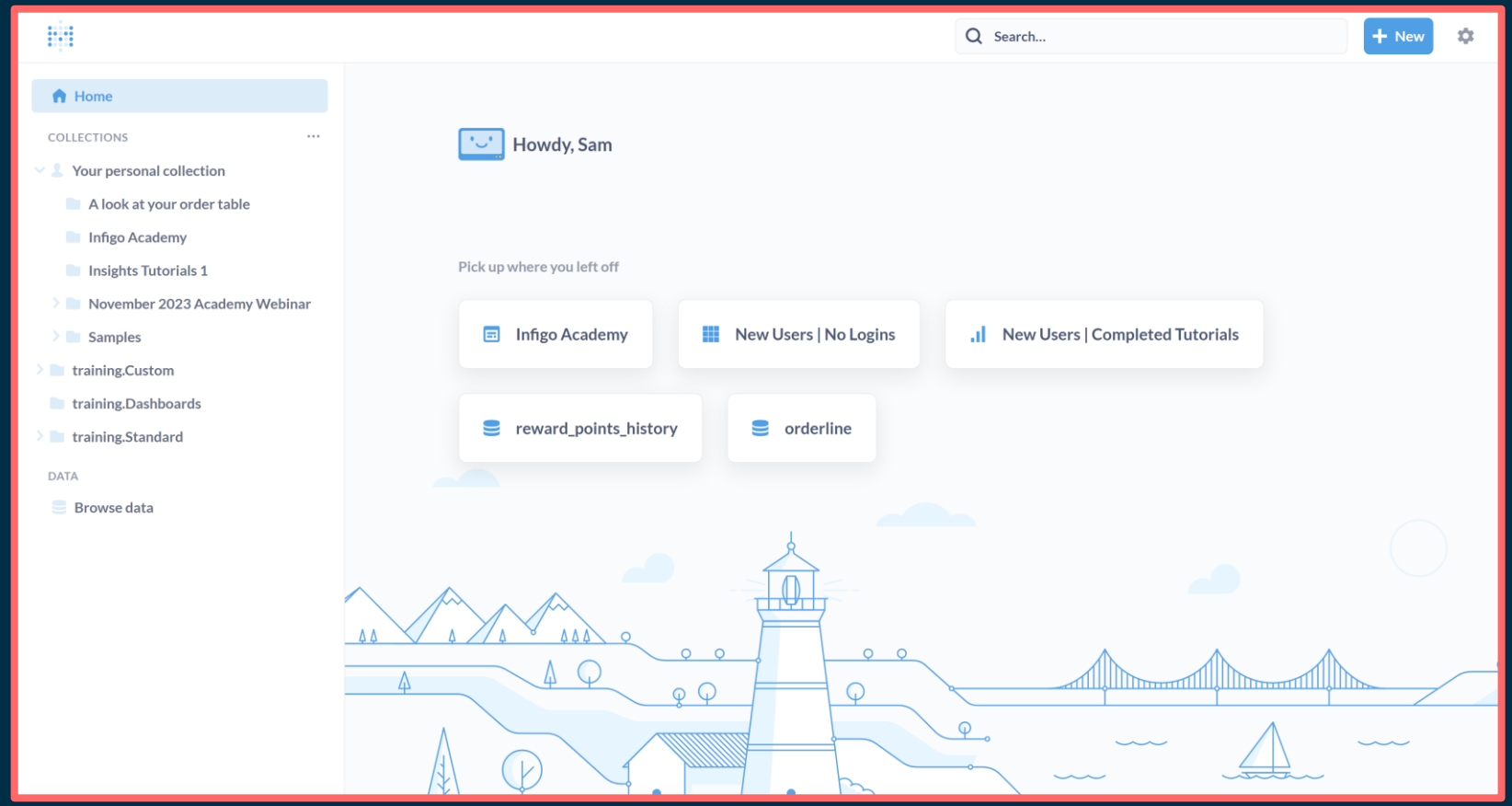
Introducing Metabase

This portal is powered by Metabase which is a very powerful front end reporting tool.

We chose to use Metabase for Insights as it is a globally recognised software specifically designed and built for turning data into meaningful information through a powerful but intuitive UI.

Metabase also has an in-depth library of help and support information online including their very own online courses that are free to follow.
More information about these can be found here:
https://www.metabase.com/learn/

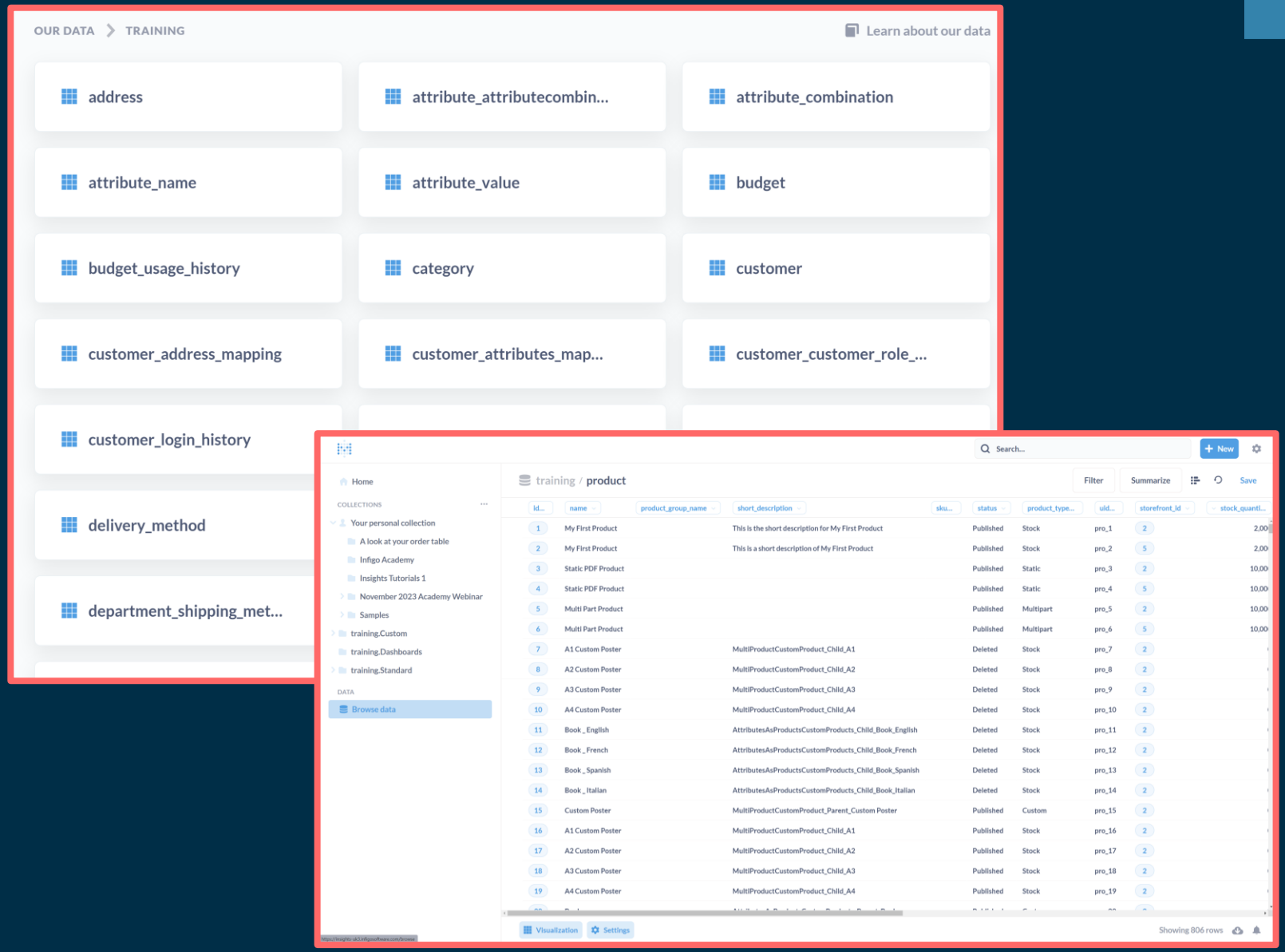


Your Platform's Database

Once logged in to Metabase you can access all of the data from your Platform, split between numerous relevant data tables.

For example, there are separate tables related to: Orders, Customers, Products, Orderlines, etc.

These can be browsed at will, but the data is expansive at this stage and will likely require additional refinement.



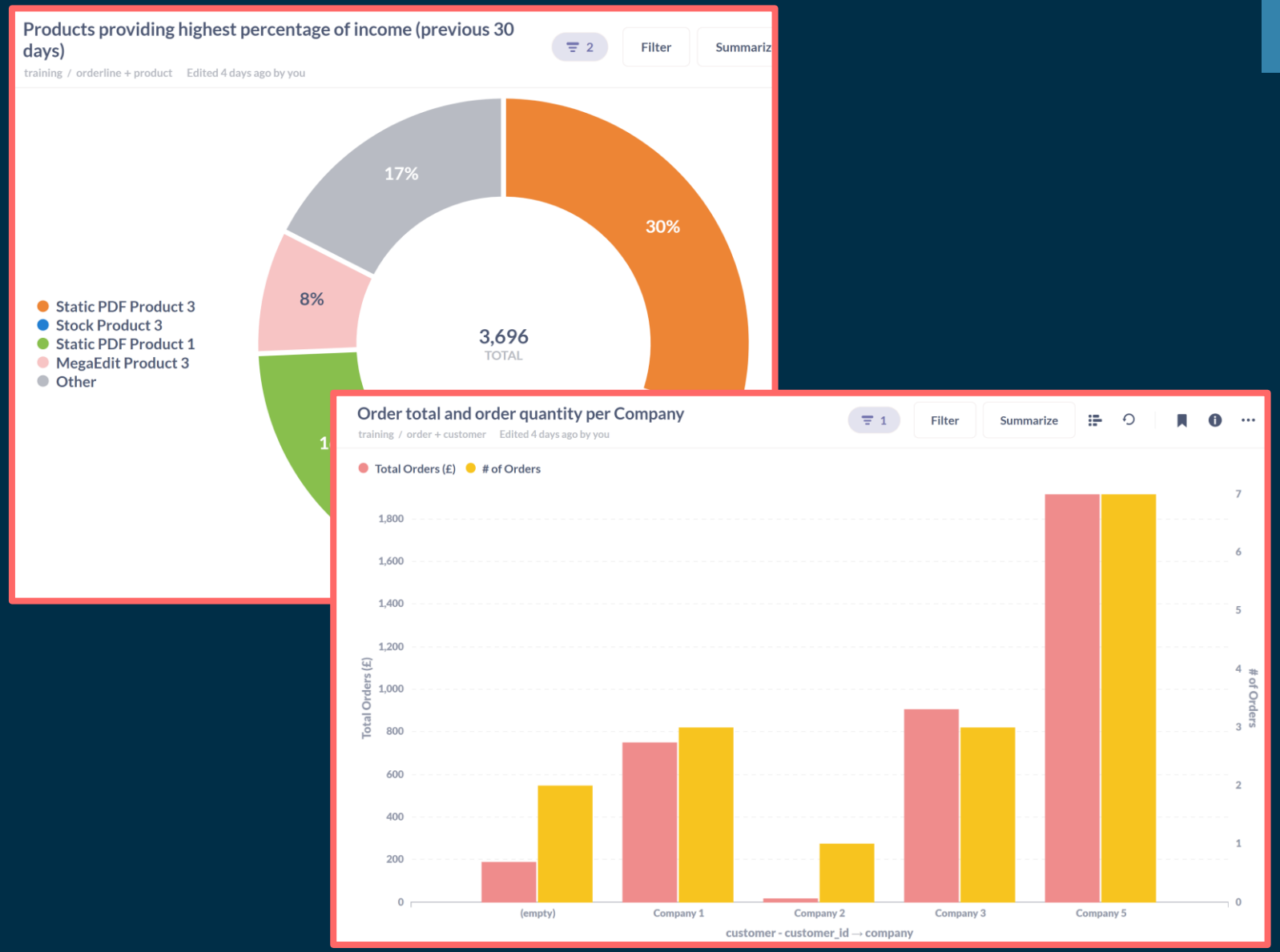
Reports or “Questions”

“Questions” are Metabase’s name for the reports you create using the system.

Creating a question allows users to perform a multitude of tasks on the available data sets to pull exactly the information they need.

Some examples of available tasks include:

- Joining separate data sets
- Summarising expansive sets of data
- Robust filtering
- Sorting of data
- Advanced visualisation with numerous chart and display types available.



Example 1 | Summary of incomplete orders

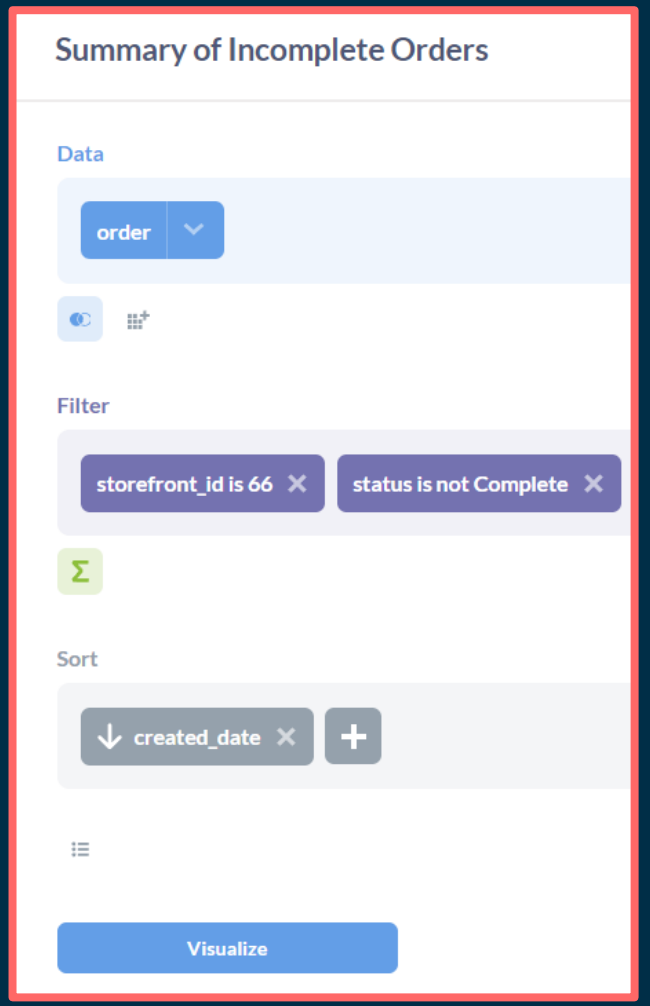
A sample table showing a summary of status for all orders which are not marked as “Completed” within one particular storefront.

This example will show:

- Simple table of data
- Selection of columns
- Filtering of data
- Sorting of data

Summary of Incomplete Orders

id	payment_status	shipping_status	status	total
1083	Paid	NotYetShipped	Processing	31
1062	Paid	NotYetShipped	Processing	54
1061	Pending	NotYetShipped	Pending	47
1059	Paid	NotYetShipped	Processing	844.99
1058	Paid	NotYetShipped	Processing	243.99
1057	Paid	NotYetShipped	Processing	6.99
1056	Paid	NotYetShipped	Processing	691.99
1055	Paid	NotYetShipped	Processing	155.99
1054	Refunded	NotYetShipped	Cancelled	96.99
1053	Paid	NotYetShipped	Processing	123.99
1052	Paid	NotYetShipped	Processing	325.99
1051	Paid	NotYetShipped	Processing	14.99
1050	Paid	NotYetShipped	Processing	3.99
1049	Paid	NotYetShipped	Processing	16.99

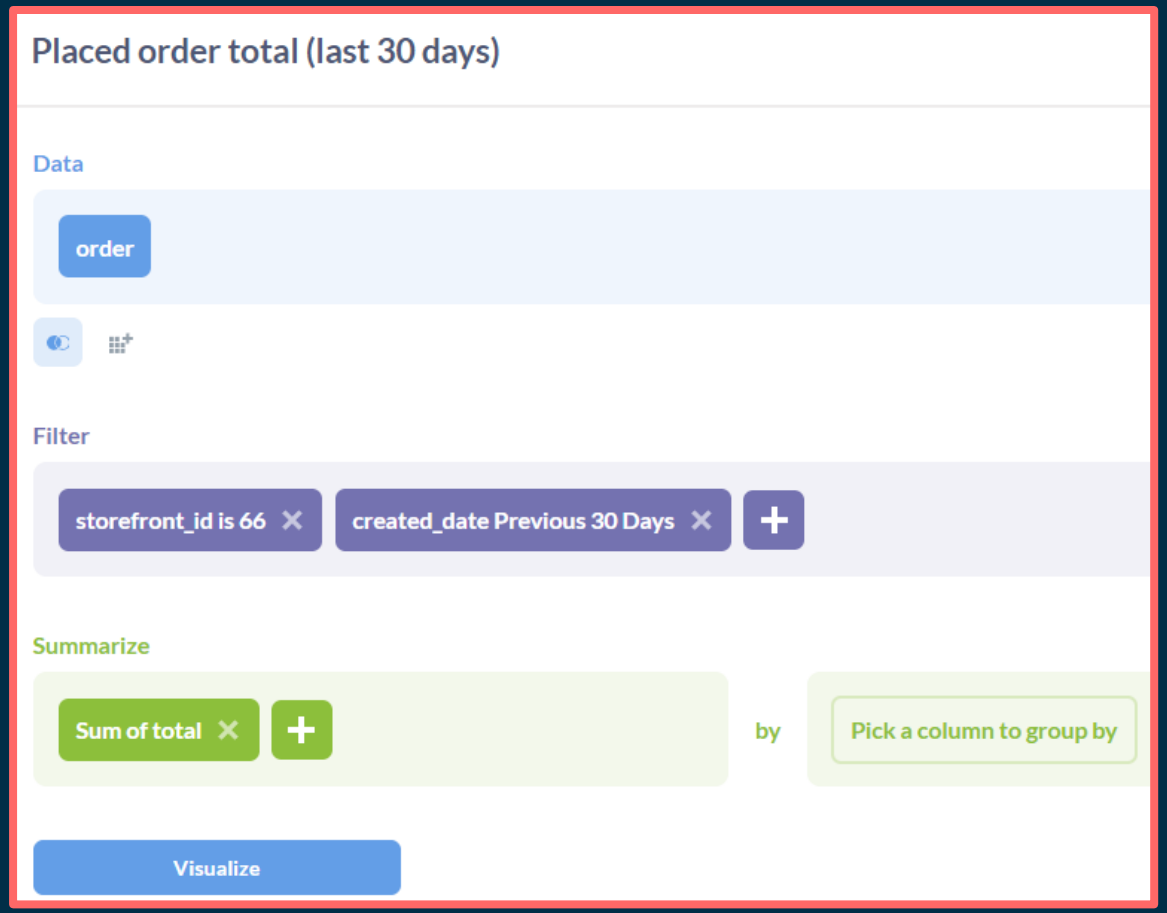


Example 2 | Placed order total

A singular displayed value showing the sum total of all placed orders from the previous 30 days.

This example will show:

- Single value return
- Filtering of data
- Summarising of data

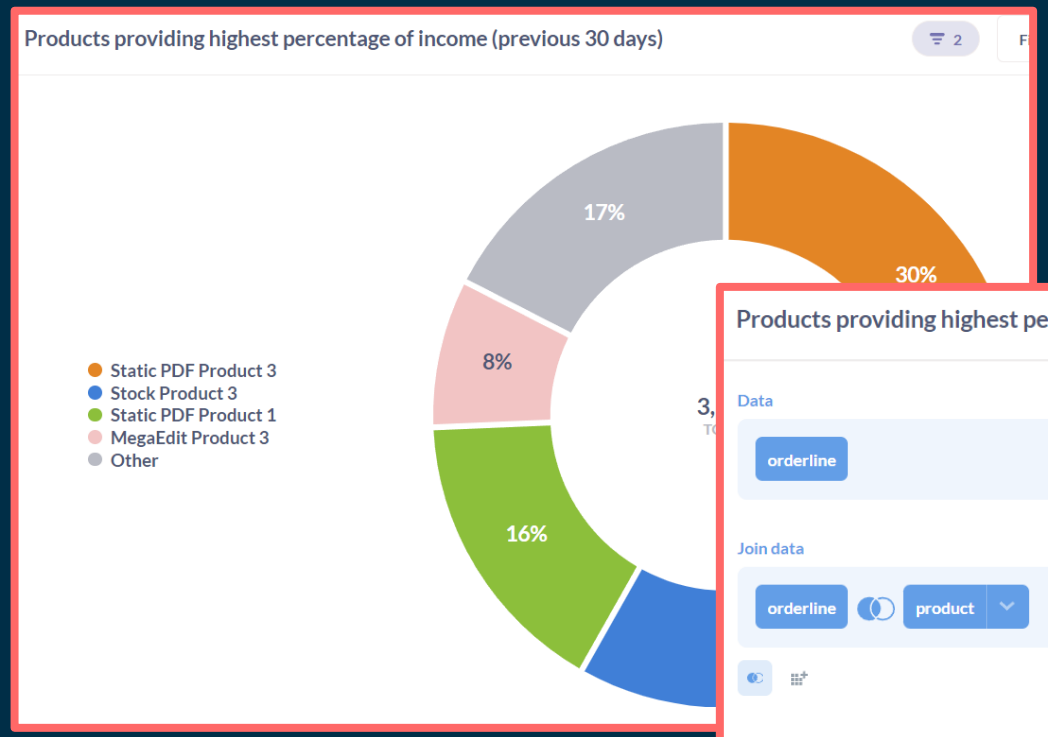


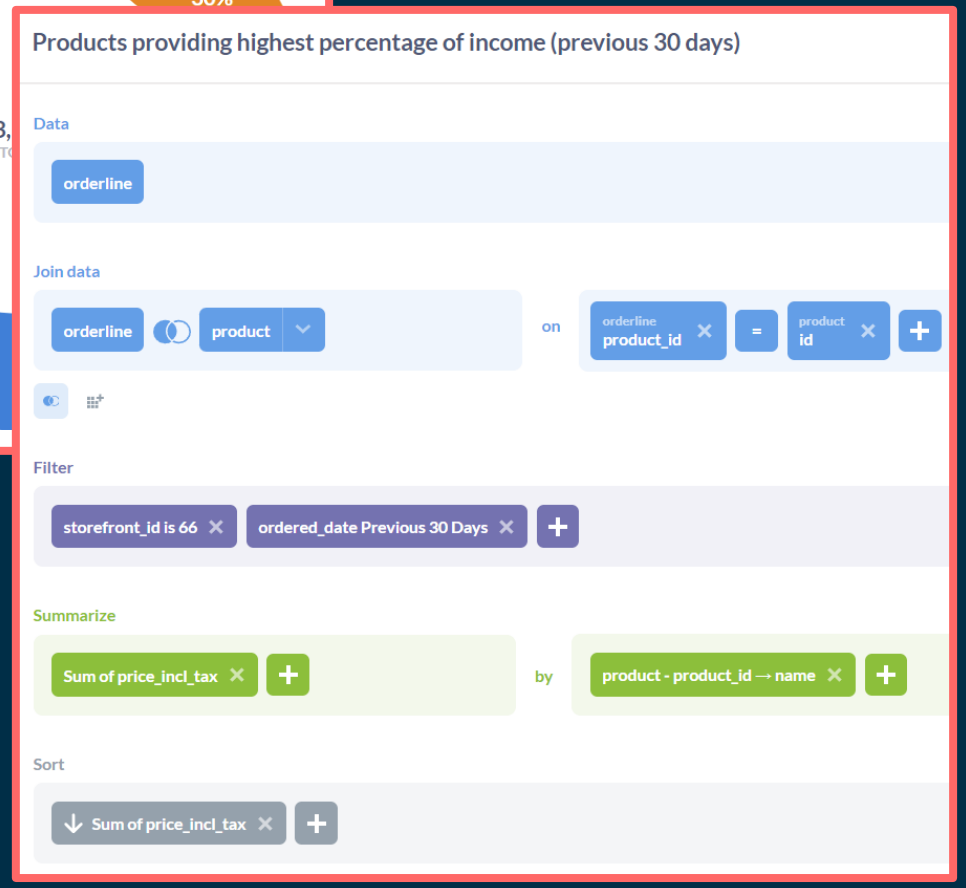
Example 3 | Products providing highest revenue

A pie chart showing the percentage of total revenue obtained from individual products.

This example will show:

- Pie chart visualisation
- Joining data sets
- Filtering data
- Summarising data by other data
- Sorting data



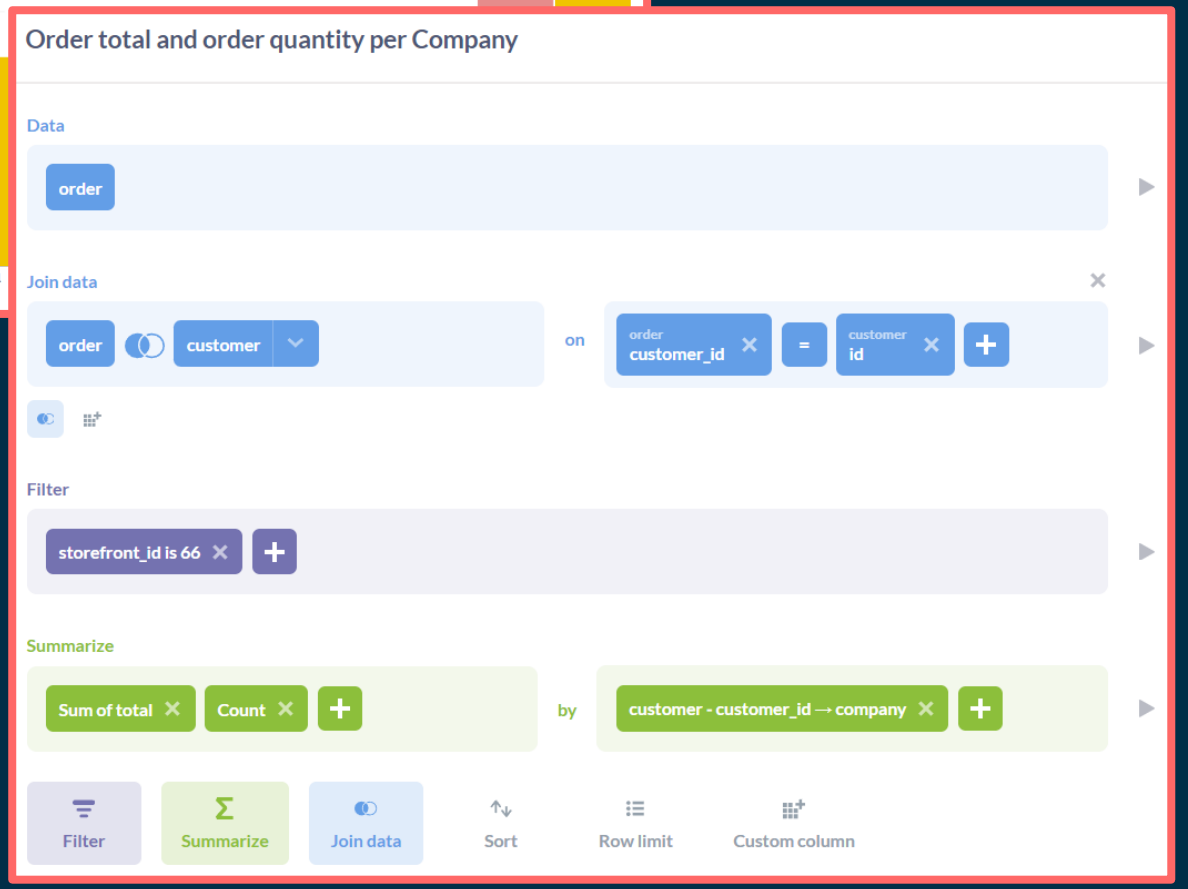


Example 4 | Company orders (total revenue and order quantity)

A bar chart showing two sets of data. Total value of orders received and total number of orders (per company)

This example will show:

- Bar chart visualisation
- Joining data sets
- Filtering data
- Multiple data summaries



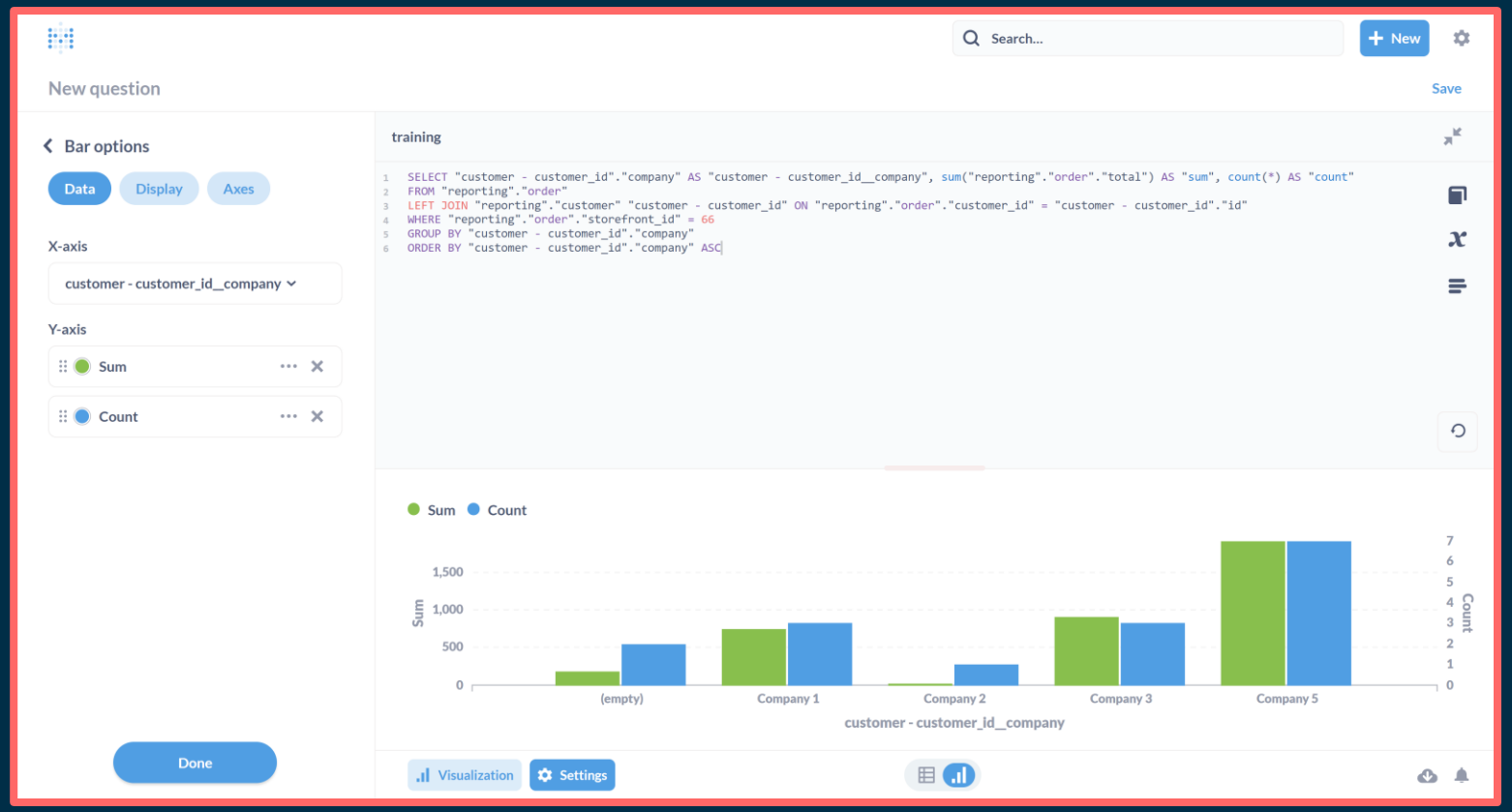
Other capabilities

We've covered created questions and dashboards using the construction tools provided.

For those with the knowledge, other forms of report customisation are also possible:

- SQL
- Custom expressions
- Custom columns

Metabase, being a third party application, has its own set of tutorial resources to assist you with these.

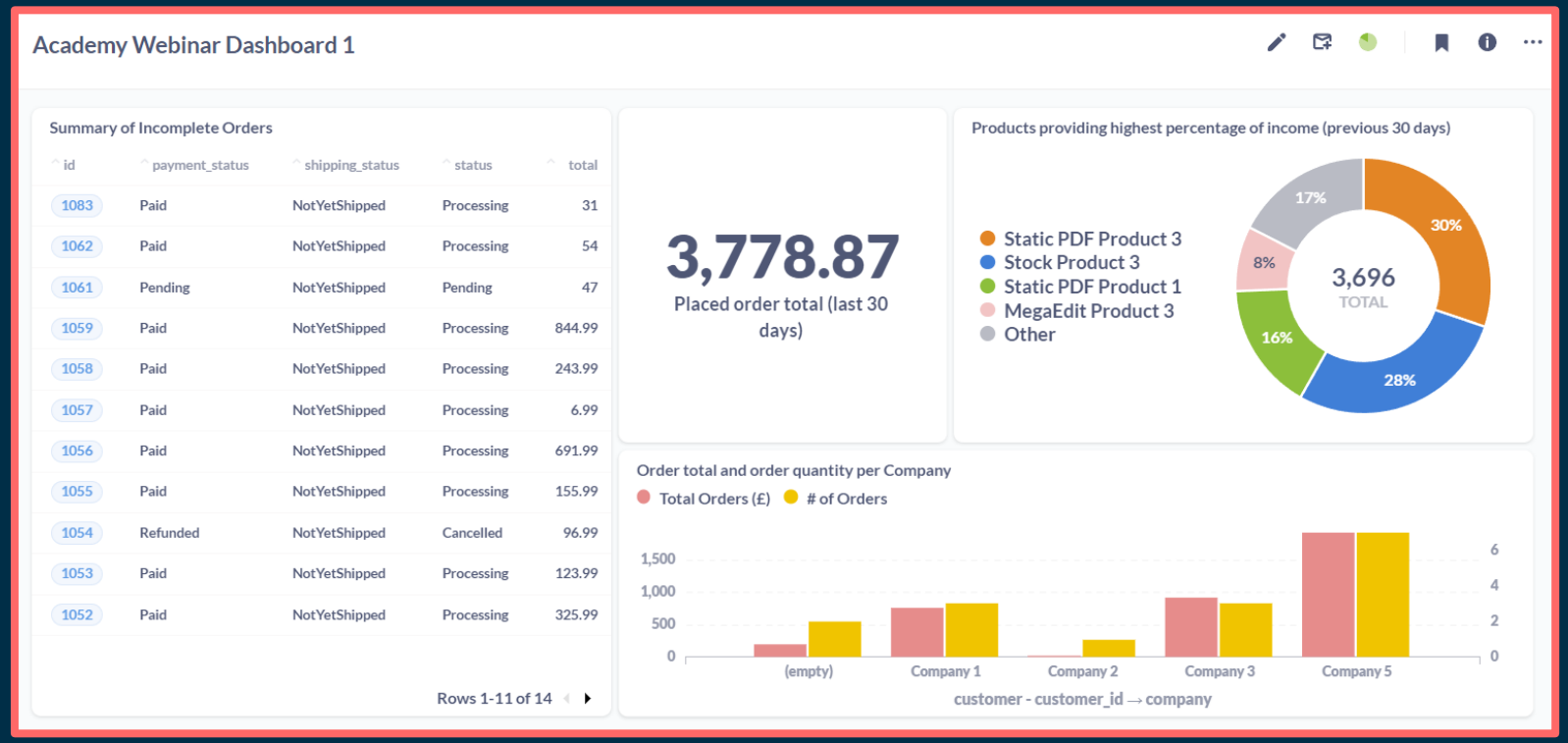


Custom Dashboards

Questions can be grouped into easily accessible custom dashboards.

These are viewable either within Metabase or within Infigo admin.

Subscriptions to dashboards can also be set, providing emails at regular intervals.

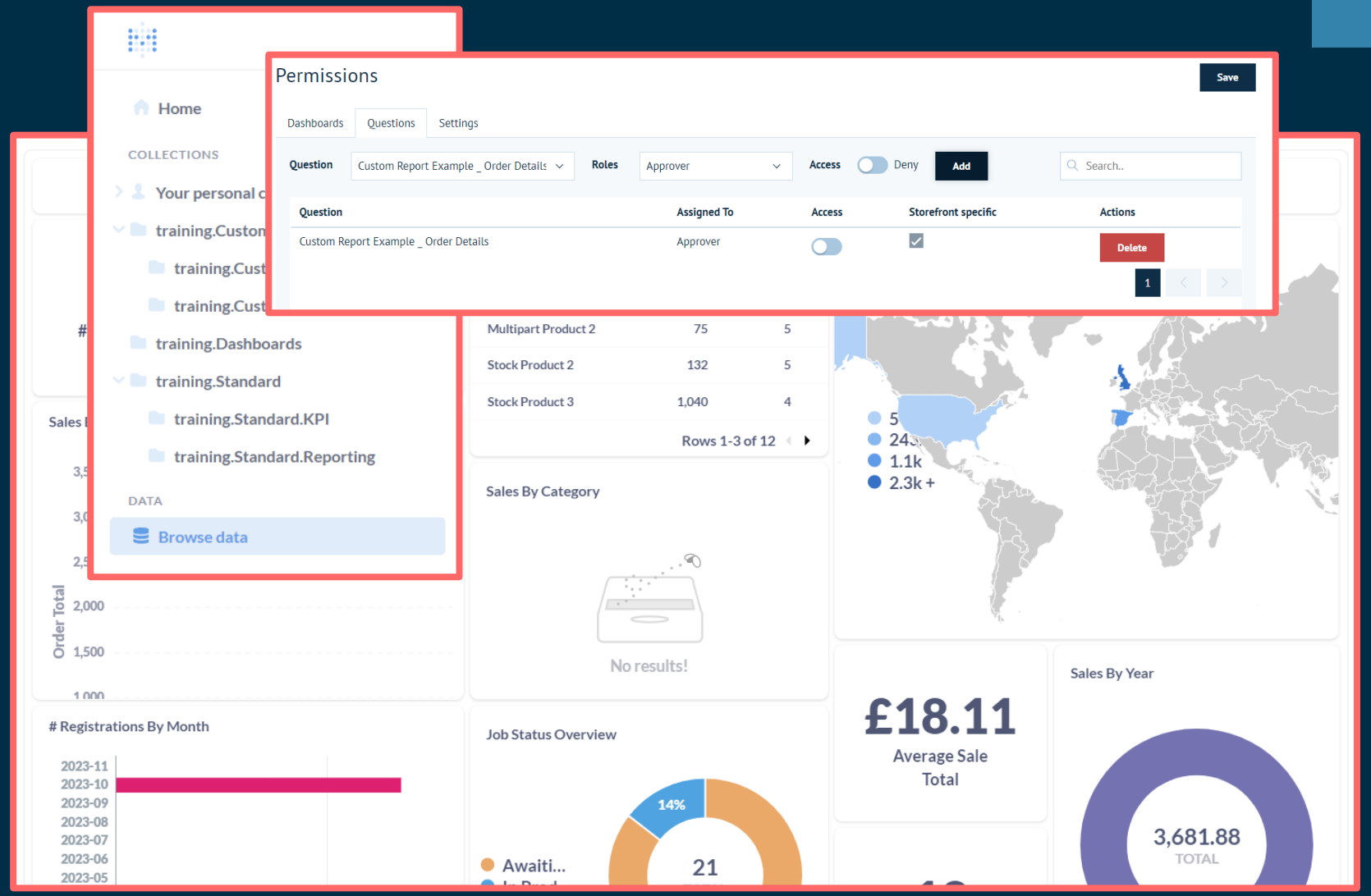


Dashboards and Questions in Infigo Admin

With the appropriate plan, reports and dashboards can be viewed and utilised within the Infigo admin area.

These are viewable in the Insights tab.

Tools exist to control permissions to the reports and dashboards.



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