

infigo



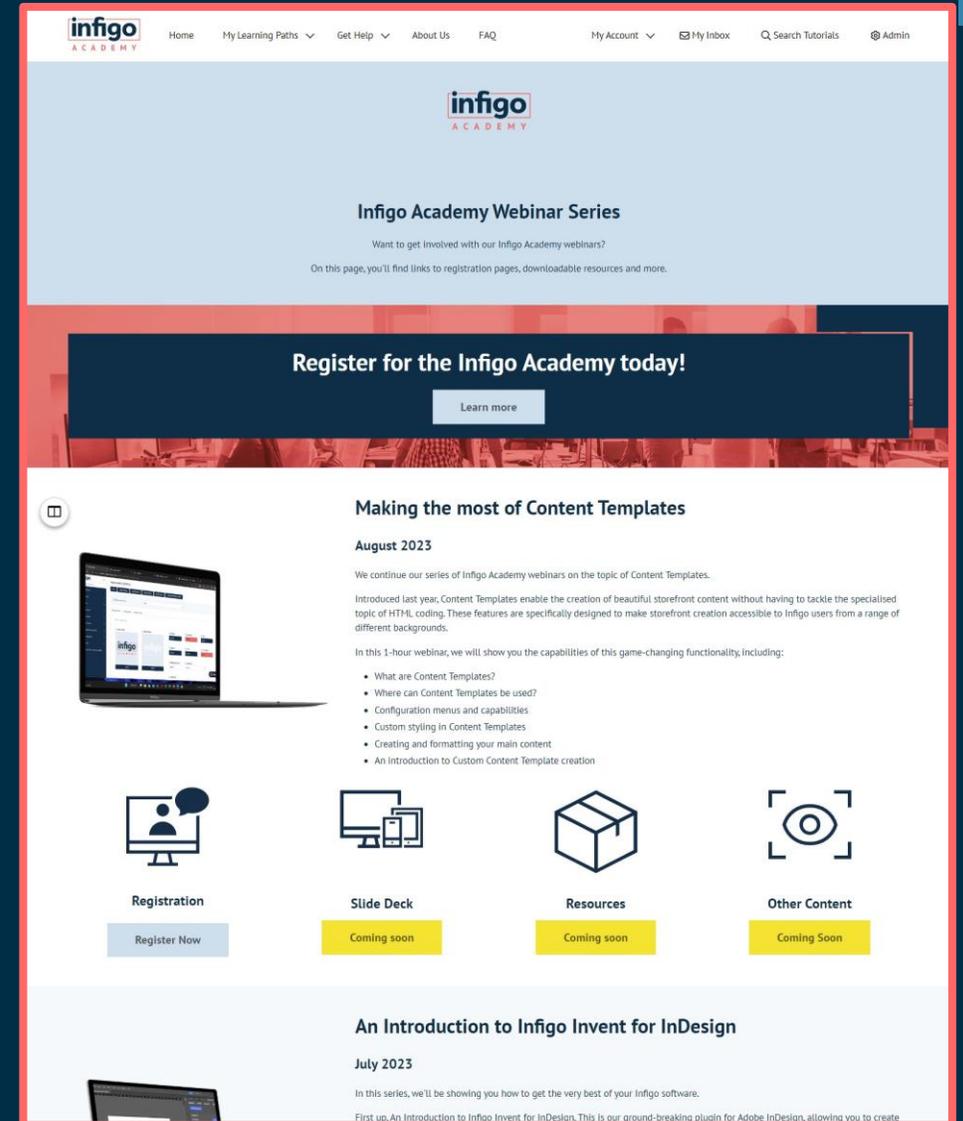


Infigo Insights Reporting Tools

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

<https://training.infigo.com/academy/t/WebinarResources>

This link will also be placed in the chat.



- 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.



Learn to use Infigo at your own pace with the Academy Portal.

Video tutorials, step by step guides, advanced searches, updates and more.

Guided learning pathways ensure a logical route through the software.

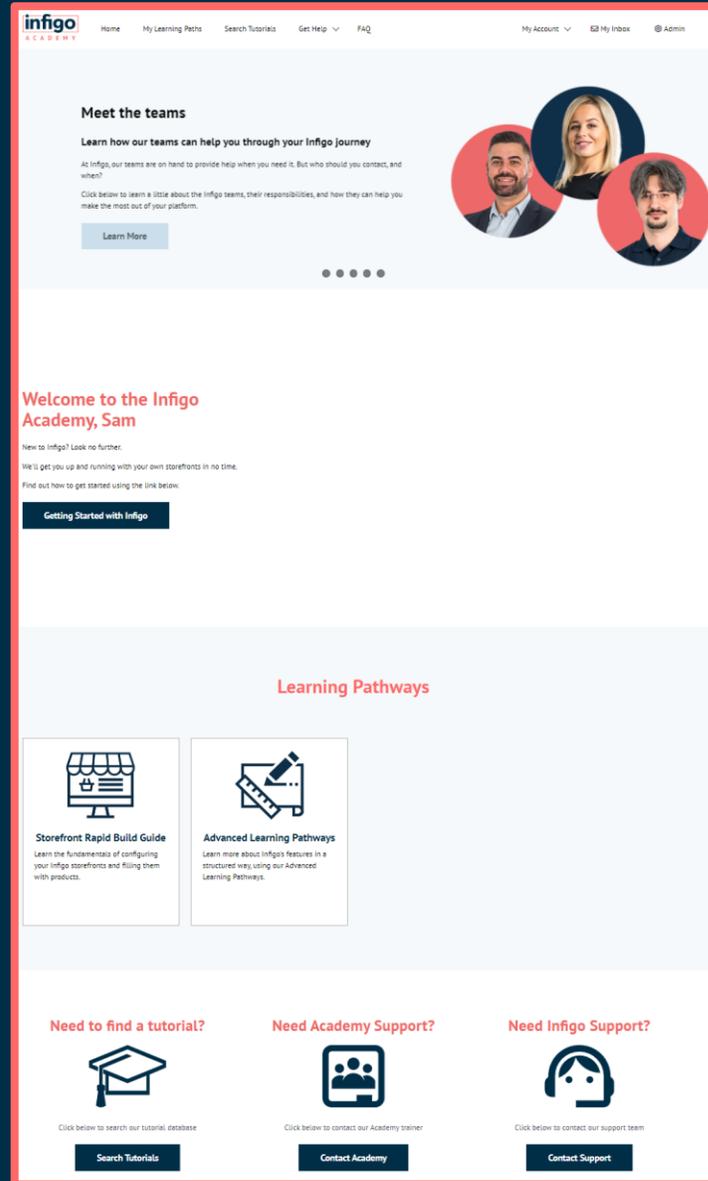
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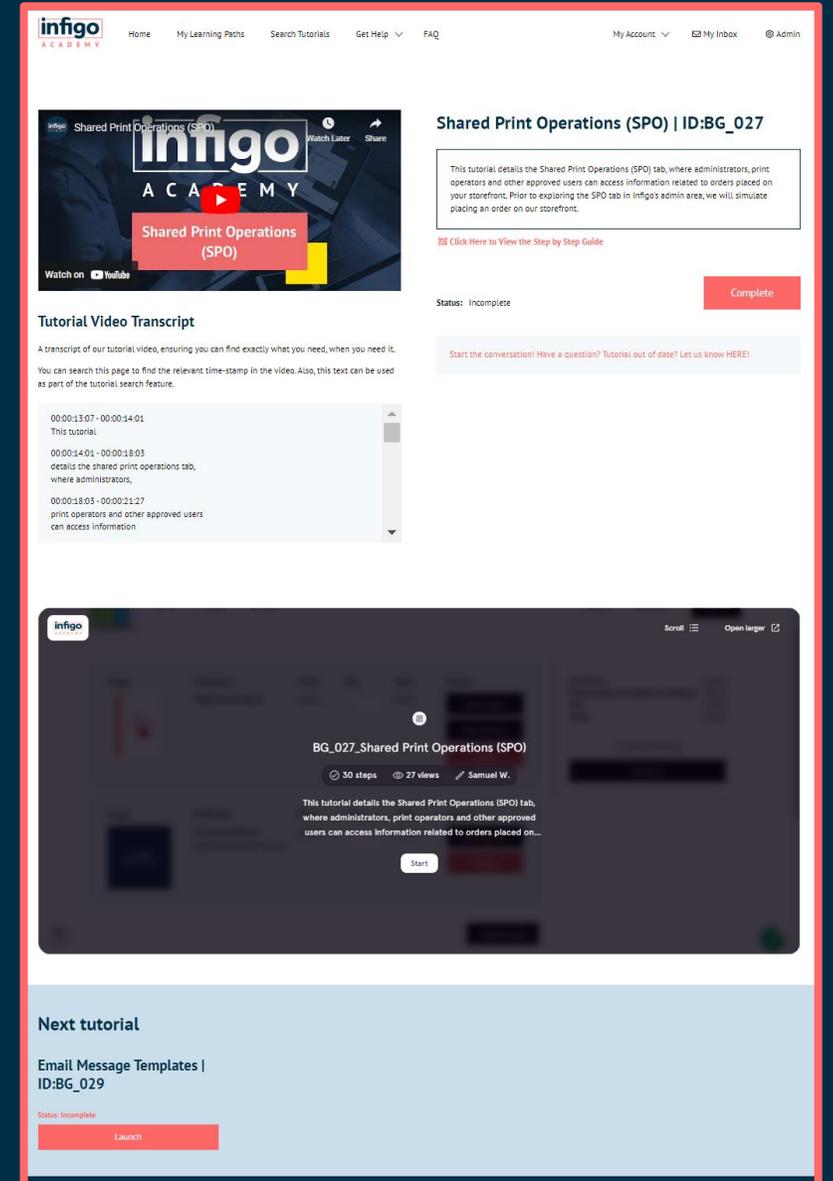
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<https://training.infigosoftware.com/academy/t/RequestAccess>

Register for the Infigo Academy



The screenshot shows the Infigo Academy homepage. At the top, there is a navigation bar with links for Home, My Learning Paths, Search Tutorials, Get Help, and FAQ. Below this, a 'Meet the teams' section features three circular profile pictures of team members. A 'Welcome to the Infigo Academy, Sam' section provides a 'Getting Started with Infigo' button. The 'Learning Pathways' section includes two cards: 'Storefront Rapid Build Guide' and 'Advanced Learning Pathways'. At the bottom, there are three support options: 'Need to find a tutorial?' with a 'Search Tutorials' button, 'Need Academy Support?' with a 'Contact Academy' button, and 'Need Infigo Support?' with a 'Contact Support' button.



The screenshot shows a tutorial page for 'Shared Print Operations (SPO) | ID:BG_027'. It features a video player with a play button and a 'Watch on YouTube' link. To the right, there is a 'Complete' button and a 'Status: Incomplete' indicator. Below the video, a 'Tutorial Video Transcript' section provides a list of timestamps and corresponding text from the video. At the bottom, there is a 'Next tutorial' section for 'Email Message Templates | ID:BG_029' with a 'Launch' button.

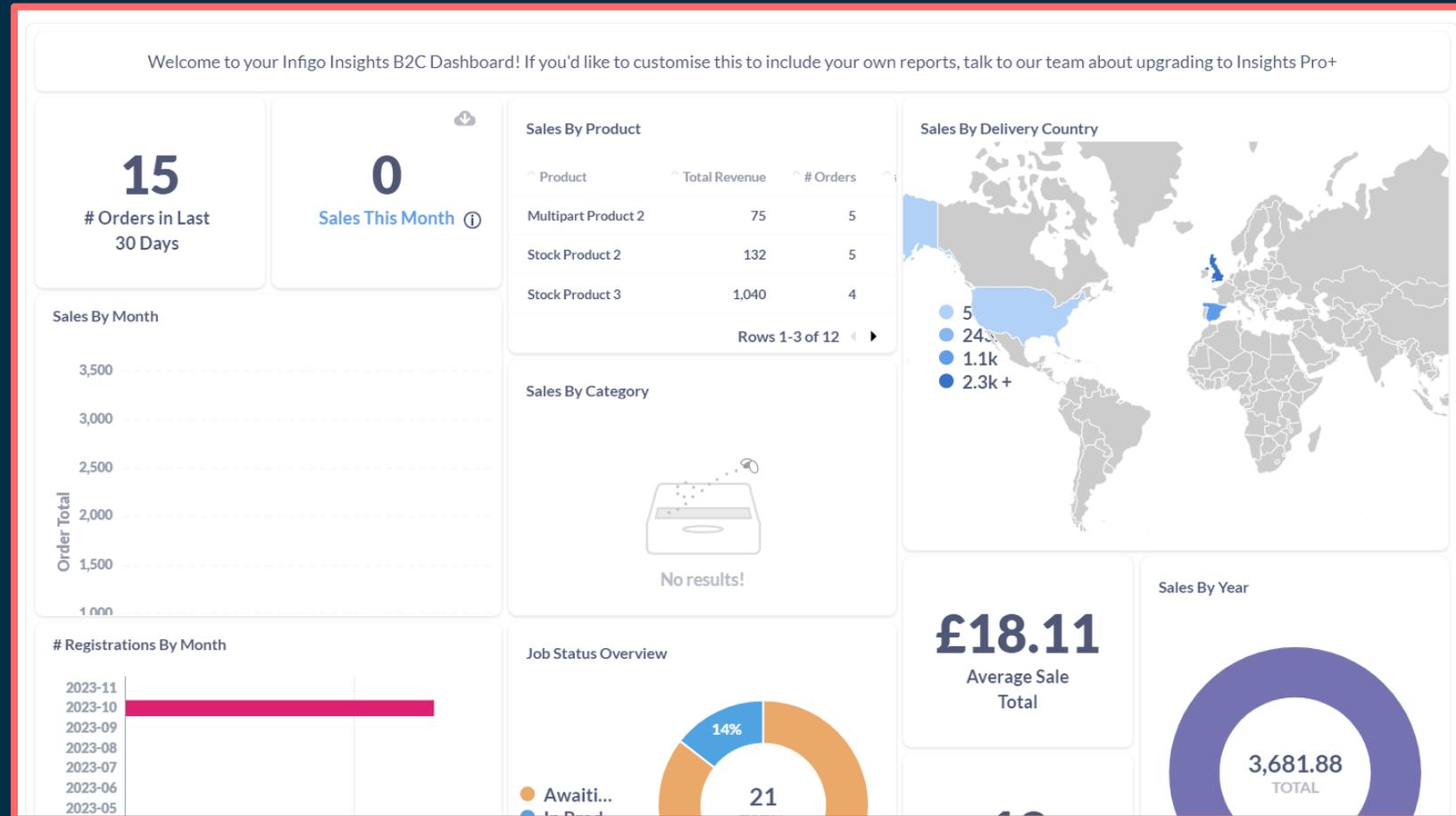


What is Infigo Insights?

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 platform, Metabase, and can operate inside Infigo admin.





[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.

The screenshot displays the Infigo dashboard interface. At the top, there is a navigation bar with the Infigo logo, a menu search bar, and links for Release Notes, Public store, Helpdesk, and Infigo Academy. The user's current account is identified as 'Test Mode - Infigo Insights 1 (65)'. A sidebar on the left contains a menu with options: Dashboard, Insights, Sales, Catalogue, Customers, Promotions, Content Management, Configuration, System, and Shared Print Operations (SPO).

The main dashboard area is titled 'Dashboard' and features several key reports:

- Best Seller:** A horizontal bar chart showing 'Static PDF Product 3' as the top performer.
- Orders Not Shipped:** A red bar chart indicating 13 orders.
- Sales Converted:** A pie chart showing the distribution of sales by status: Pending (blue), Processing (yellow), Complete (green), and Cancelled (red).
- Sales Totals:** A bar chart showing sales volume for Pending, Processing, Complete, and Cancelled orders.
- Order totals:** A table summarizing order status across different time periods.
- Best Sellers By Quantity:** A table listing the top-selling products by quantity and total amount.

Order Status	Today	This Week	This Month	This Year	All time
Pending	£0.00	£0.00	£0.00	£47.00	£47.00
Processing	£0.00	£0.00	£0.00	£2,514.90	£2,514.90
Complete	£0.00	£0.00	£0.00	£1,119.98	£1,119.98
Cancelled	£0.00	£0.00	£0.00	£96.99	£96.99

Name	Total quantity	Total amount (excl tax)	View
Static PDF Product 1	119	£595.00	View
Static PDF Product 3	112	£1,120.00	View
Stock Product 3	80	£1,040.00	View
Static PDF Product 2	32	£96.00	View
MegaEdit Product 3	27	£297.00	View



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.

Reporting Centre (Legacy)

Bespoke Reporting

Custom Report Info

? Select a Report

Sales - Order Line Detail

? Include column headers

? Show all dates

Generate Report

The downloads may contain 'Personally Identifiable Information' (PII) and by using this feature you agree to treat this in

	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	CostCentri	Departme	OrderId	JobReference	SKU	ProductName	ShortDesc	OrderStatus	OrderLineStatus	ShippingMethod	PaymentStatus	Customer	UnitPrice	Pricelnc	Discount	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@infigo			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@infigo			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@infigo			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@infigo			7831	d-518		MegaEdit Product 2		Processing	On Hold	First Class	Paid	GBP	13	13					24/10/2023 13:48	25/10/2023
10	Infigo Insights 1	502	customer_16@infigo			7832	n-1514		Stock Product 2		Processing	Ordered	First Class	Paid	GBP	11	88					24/10/2023 13:53	25/10/2023
11	Infigo Insights 1	502	customer_16@infigo			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@infigo			7832	n-1516		Stock Product 3		Processing	Printed	First Class	Paid	GBP	13	221					24/10/2023 13:53	25/10/2023
13	Infigo Insights 1	502	customer_16@infigo			7833	n-1517		Stock Product 3		Processing	Ordered	2nd Class	Paid	GBP	13	13					24/10/2023 14:00	25/10/2023
14	Infigo Insights 1	502	customer_16@infigo			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@infigo			7834	n-1519		Multipart Product 2		Cancelled	Ordered	First Class	Refunded	GBP	5	50					24/10/2023 14:09	25/10/2023
16	Infigo Insights 1	502	customer_16@infigo			7834	s-11		Static PDF Product 2		Cancelled	Output Created	First Class	Refunded	GBP	3	45					24/10/2023 14:09	25/10/2023
17	Infigo Insights 1	485	sam.webster@infigo.net			7835	n-1521		Stock Product 2		Processing	Ordered	First Class	Paid	GBP	11	11					24/10/2023 14:19	25/10/2023
18	Infigo Insights 1	485	sam.webster@infigo.net			7835	d-520		MegaEdit Product 2		Processing	Shipped	First Class	Paid	GBP	13	143					24/10/2023 14:19	25/10/2023
19	Infigo Insights 1	488	customer_2@infigo			7836	s-12		Static PDF Product 2		Processing	Shipped	First Class	Paid	GBP	10	100					24/10/2023 15:26	25/10/2023

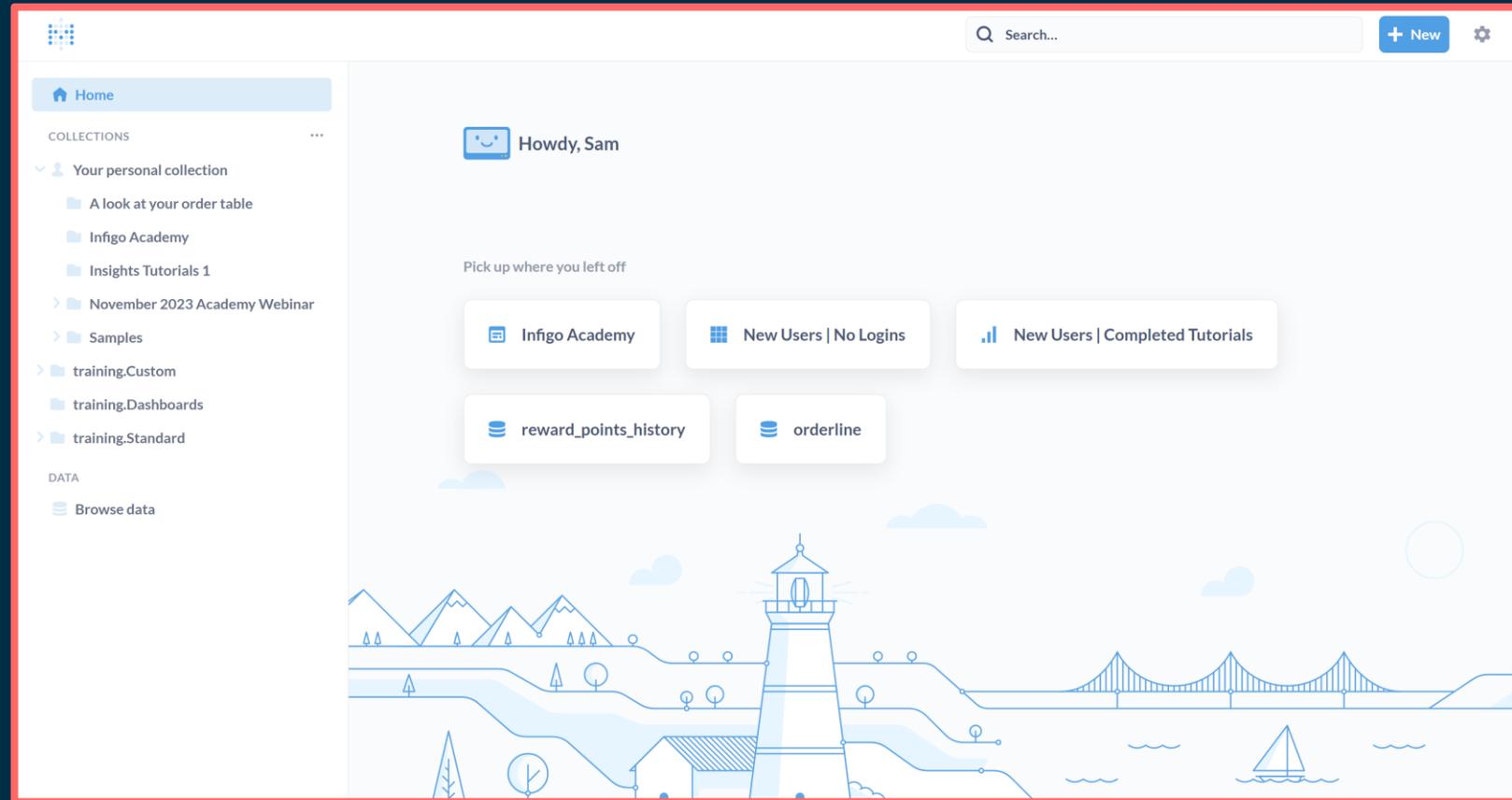
This portal is powered by Metabase which is a very powerful front end reporting tool.

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/>



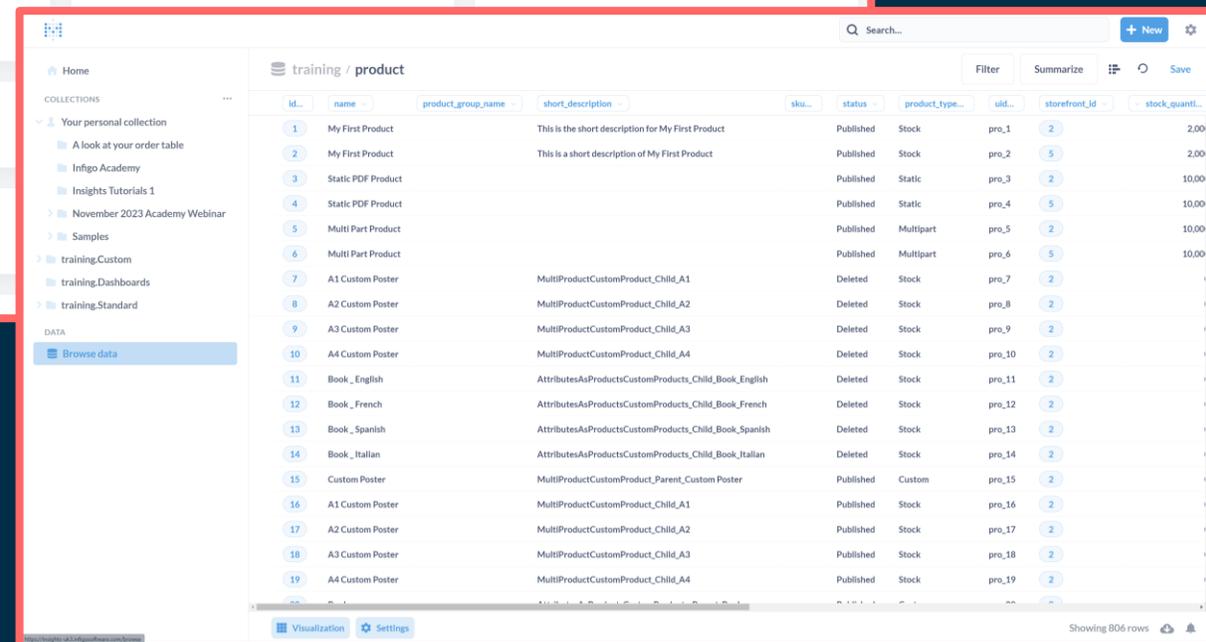
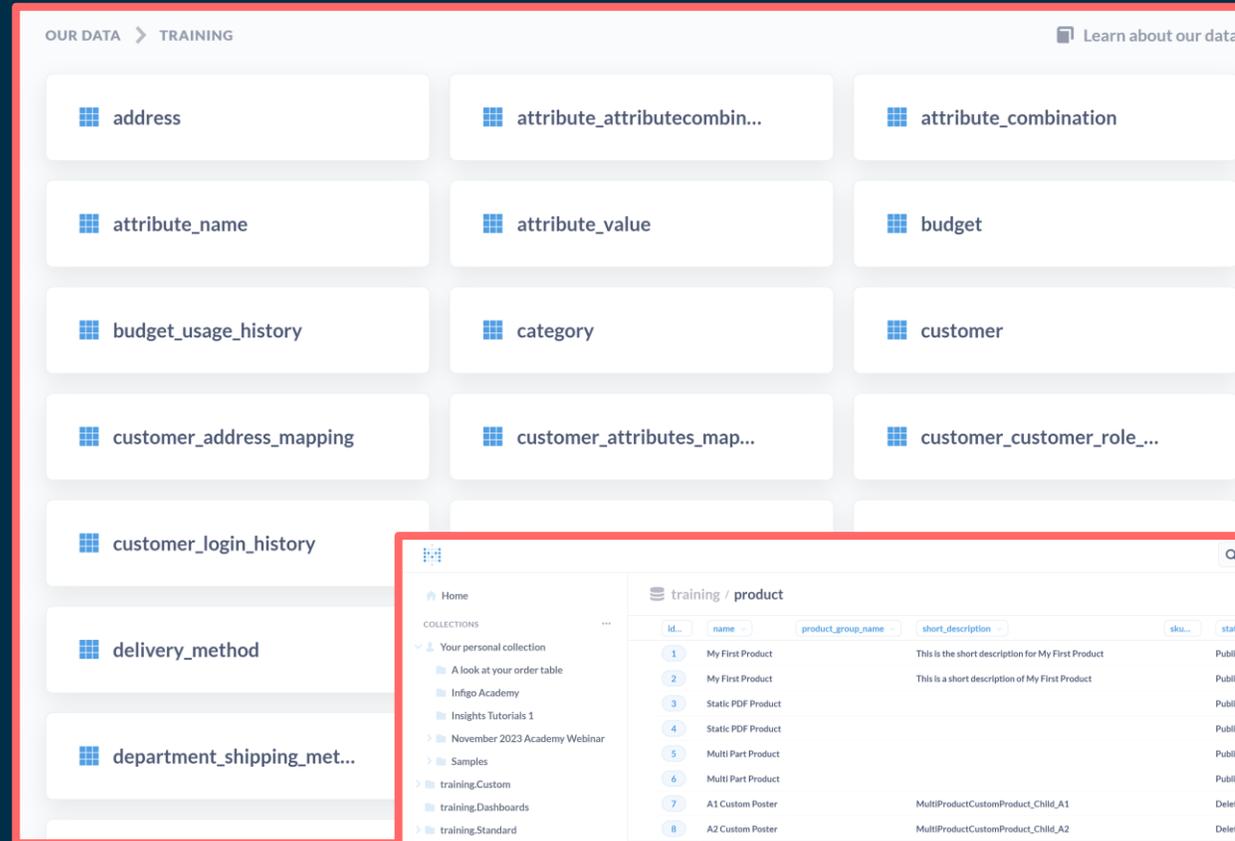


Your Platform's Database

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.

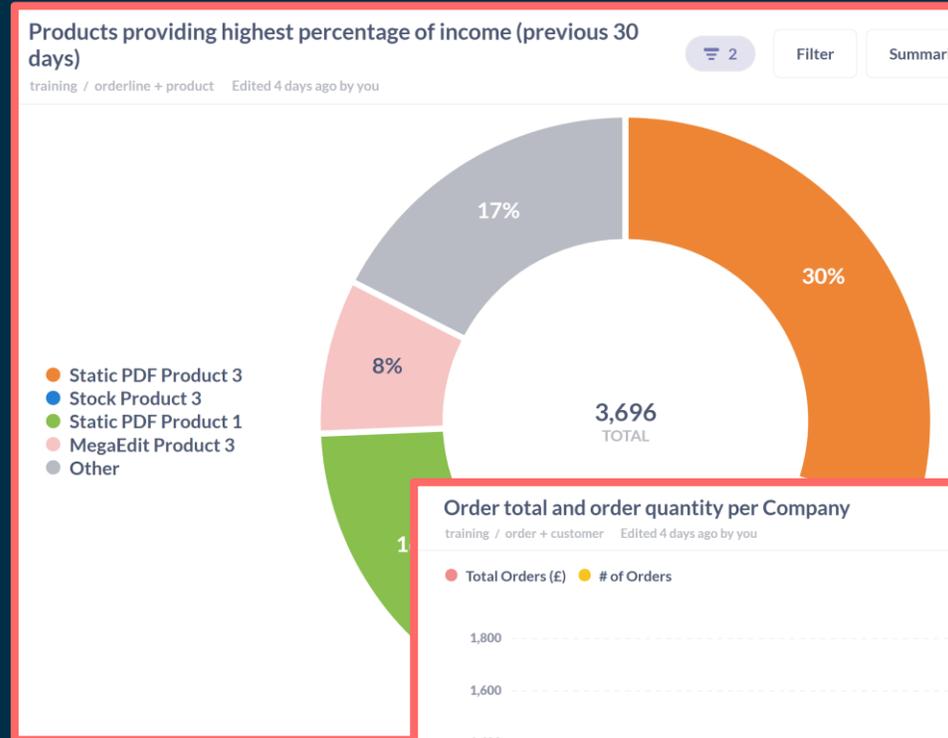


“Questions” are Metabase’s name for the reports you create using the system.

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.



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

Summary of Incomplete Orders

Data

order

Filter

storefront_id is 66 × status is not Complete ×

Sort

created_date × +

Visualize

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

3,778.87
Placed order total (last 30 days)

The screenshot shows a configuration interface for a data visualization. At the top, the title is "Placed order total (last 30 days)". Below this, there are three main sections: "Data", "Filter", and "Summarize".

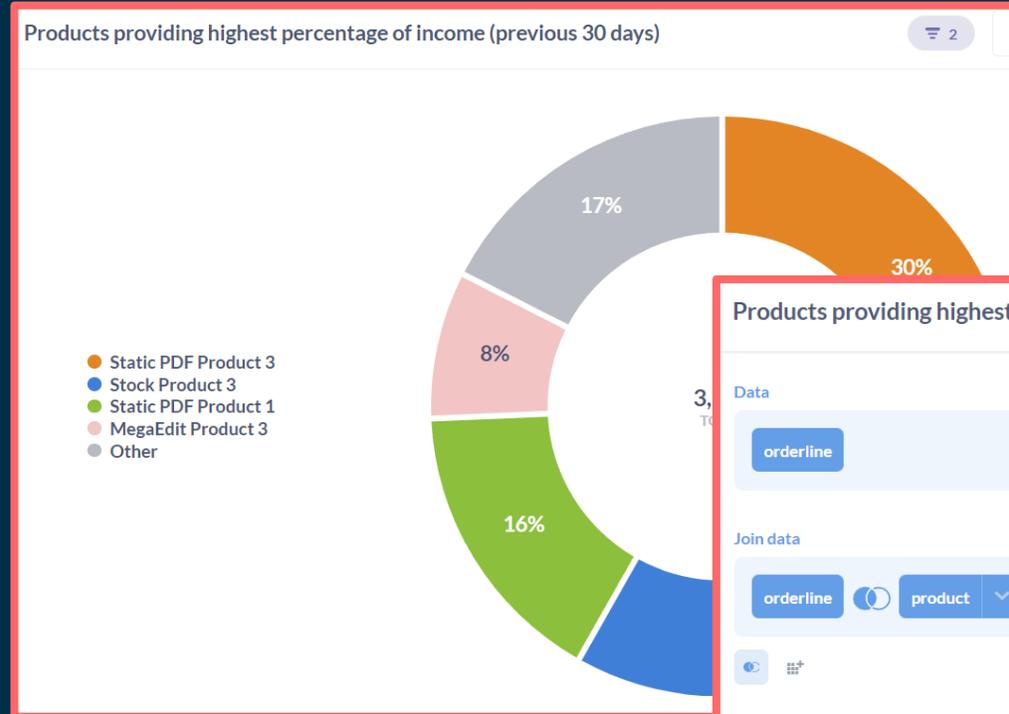
- Data:** A blue button labeled "order" is selected.
- Filter:** Two filters are applied: "storefront_id is 66" and "created_date Previous 30 Days".
- Summarize:** The aggregation function is set to "Sum of total". A "by" dropdown menu is currently empty, with the placeholder text "Pick a column to group by".

At the bottom of the interface is a blue "Visualize" button.

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



Products providing highest percentage of income (previous 30 days)

Data
 - `orderline`

Join data
 - `orderline` on `product`
 - Join condition: `orderline.product_id = product.id`

Filter
 - `storefront_id is 66`
 - `ordered_date Previous 30 Days`

Summarize
 - Sum of `price_incl_tax` by `product - product_id -> name`

Sort
 - Sort by `Sum of price_incl_tax` (descending)

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



The screenshot shows the Infigo interface for configuring the bar chart. The title is 'Order total and order quantity per Company'. The configuration is as follows:

- Data:** 'order' table.
- Join data:** 'order' table joined with 'customer' table on 'order.customer_id = customer.id'.
- Filter:** 'storefront_id is 66'.
- Summarize:** 'Sum of total' and 'Count' by 'customer - customer_id → company'.

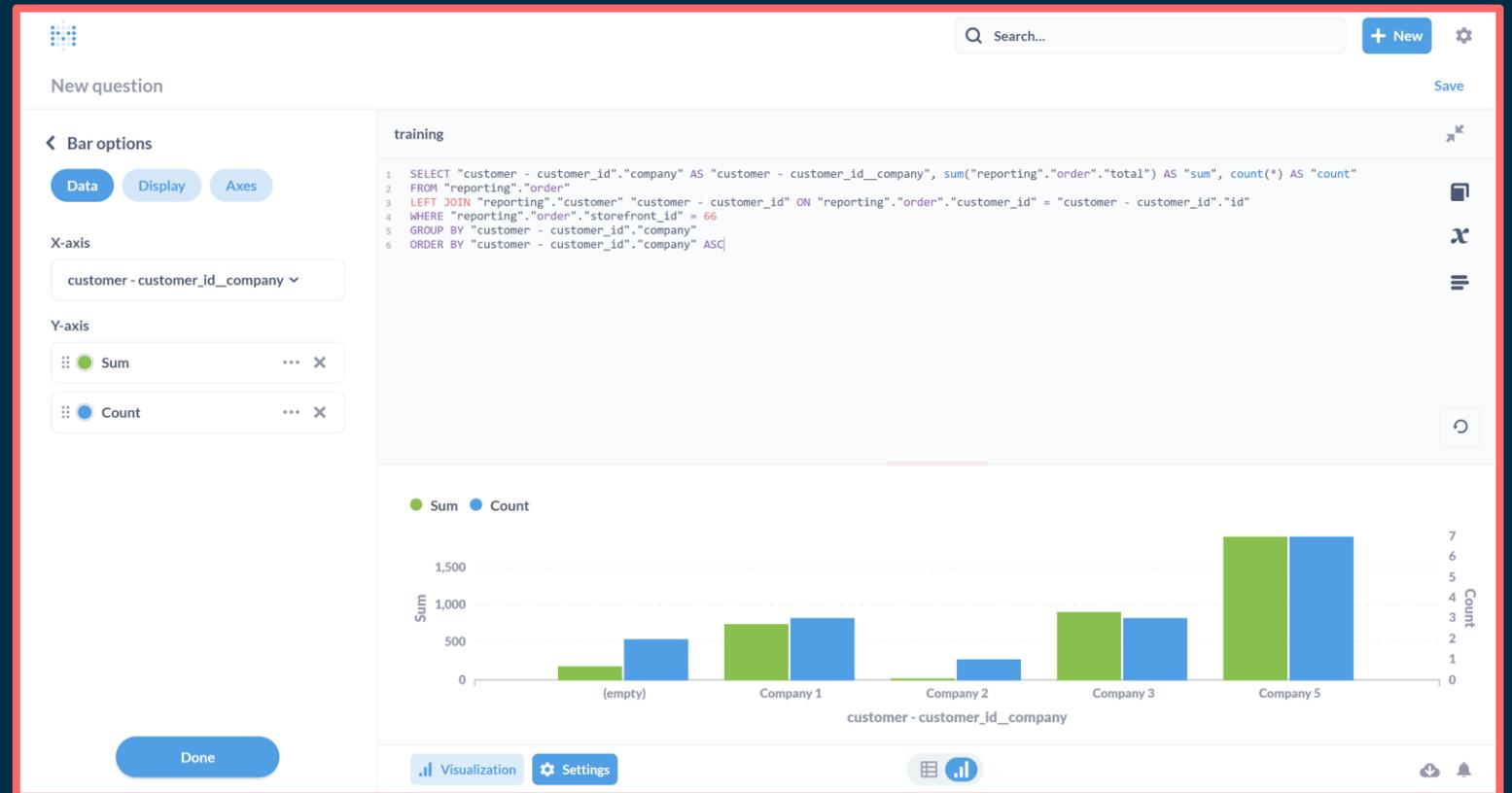
At the bottom, there are controls for Filter, Summarize, Join data, Sort, Row limit, and Custom column.

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.

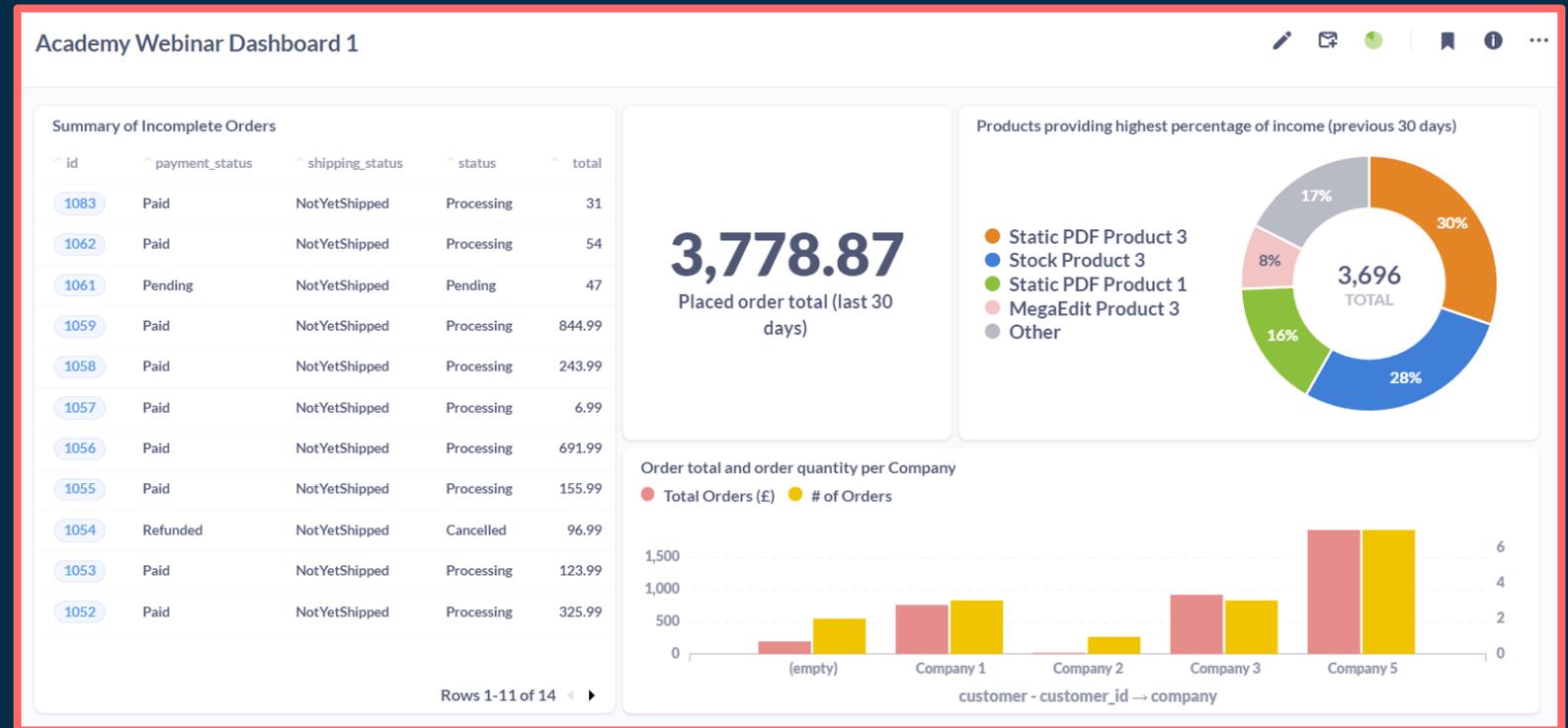




Questions can be grouped into easily accessible custom dashboards.

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.

The screenshot displays the Infigo Admin interface. A 'Permissions' modal is open, showing a table of permissions for the 'Custom Report Example _ Order Details' question. The modal includes tabs for 'Dashboards', 'Questions', and 'Settings'. The 'Questions' tab is active, showing a table with columns for 'Question', 'Assigned To', 'Access', 'Storefront specific', and 'Actions'. The table contains one row for 'Custom Report Example _ Order Details' assigned to 'Approver' with 'Access' set to 'Deny' and 'Storefront specific' checked. A 'Delete' button is visible next to the row. The background shows a dashboard with various widgets: a 'COLLECTIONS' list, a 'DATA' section with a 'Browse data' button, a 'Sales By Category' table, a 'Sales By Year' chart, and a 'Job Status Overview' donut chart.

Question	Assigned To	Access	Storefront specific	Actions
Custom Report Example _ Order Details	Approver	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Delete

Category	Value	Count
Multipart Product 2	75	5
Stock Product 2	132	5
Stock Product 3	1,040	4

Rows 1-3 of 12

Average Sale Total: £18.11

Job Status Overview: 21 (14% Awaiti...)

Sales By Year: 3,681.88 TOTAL



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