



A C A D E M Y

Getting Results with Infigo Insights:

Tiers, Access & Practical Reporting

Housekeeping

Topic: Getting the most out of Infigo Insights

Duration: 1-hour

Supported by: Harrison Reeves and Harper Lester

Any questions, pop them in the chat

Recording will be available on the Academy post-webinar

Agenda

- Insights Explained
- Subscription Levels of Insights
- Permissions within Insights
- Metabase Explained
- Default Reports and Report Building Tools
- Default Dashboards and Dashboard Building Tools
- Email Subscriptions within Metabase
- Have Your Say

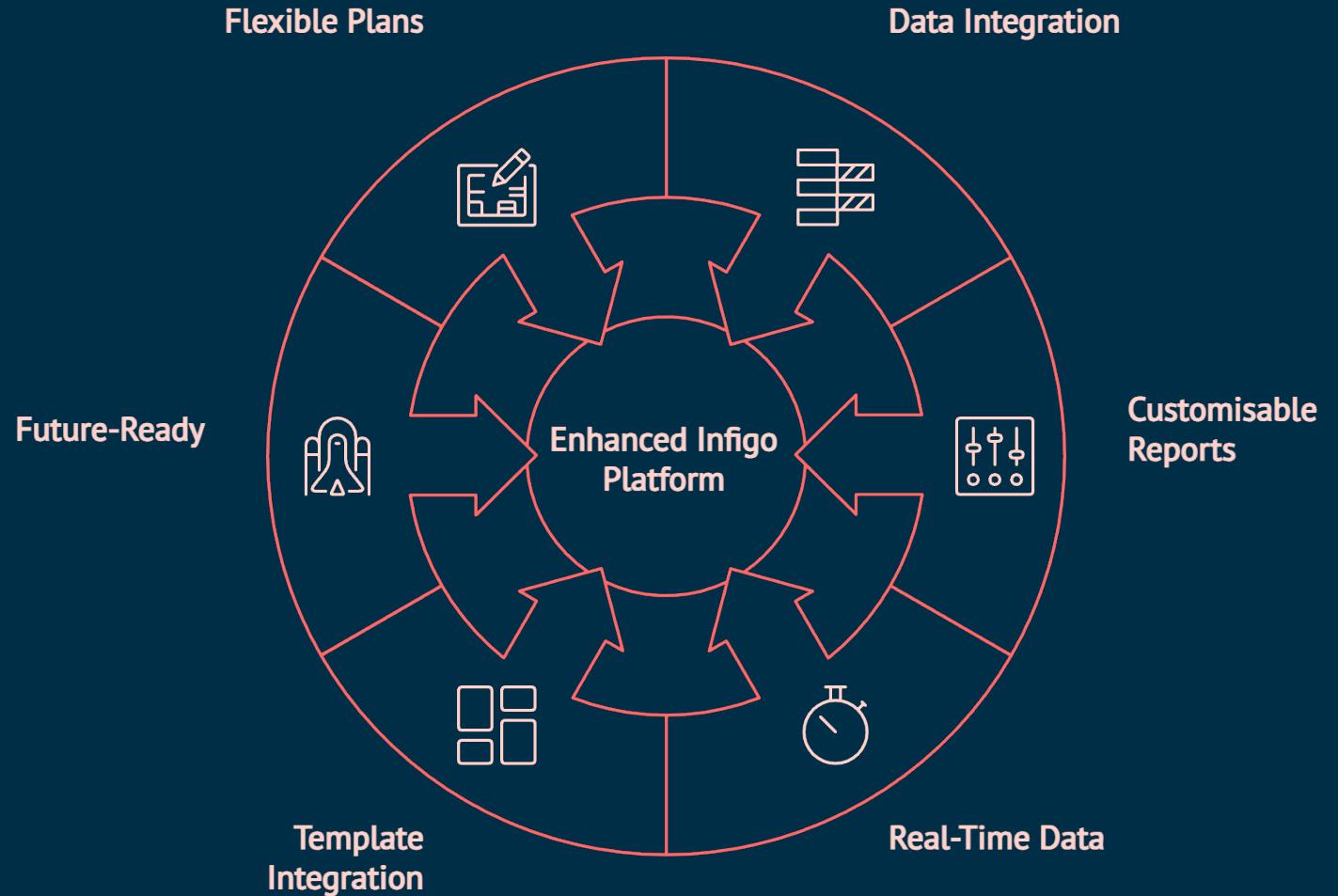


A C A D E M Y

About Insights

Infigo Insights is a comprehensive and scalable reporting module that empowers businesses with real-time data visualization, customizable dashboards, and advanced analytics to make informed decisions.

It seamlessly integrates various data sources, allowing users to create reusable templates and perform in-depth performance tracking without interrupting live storefront operations.



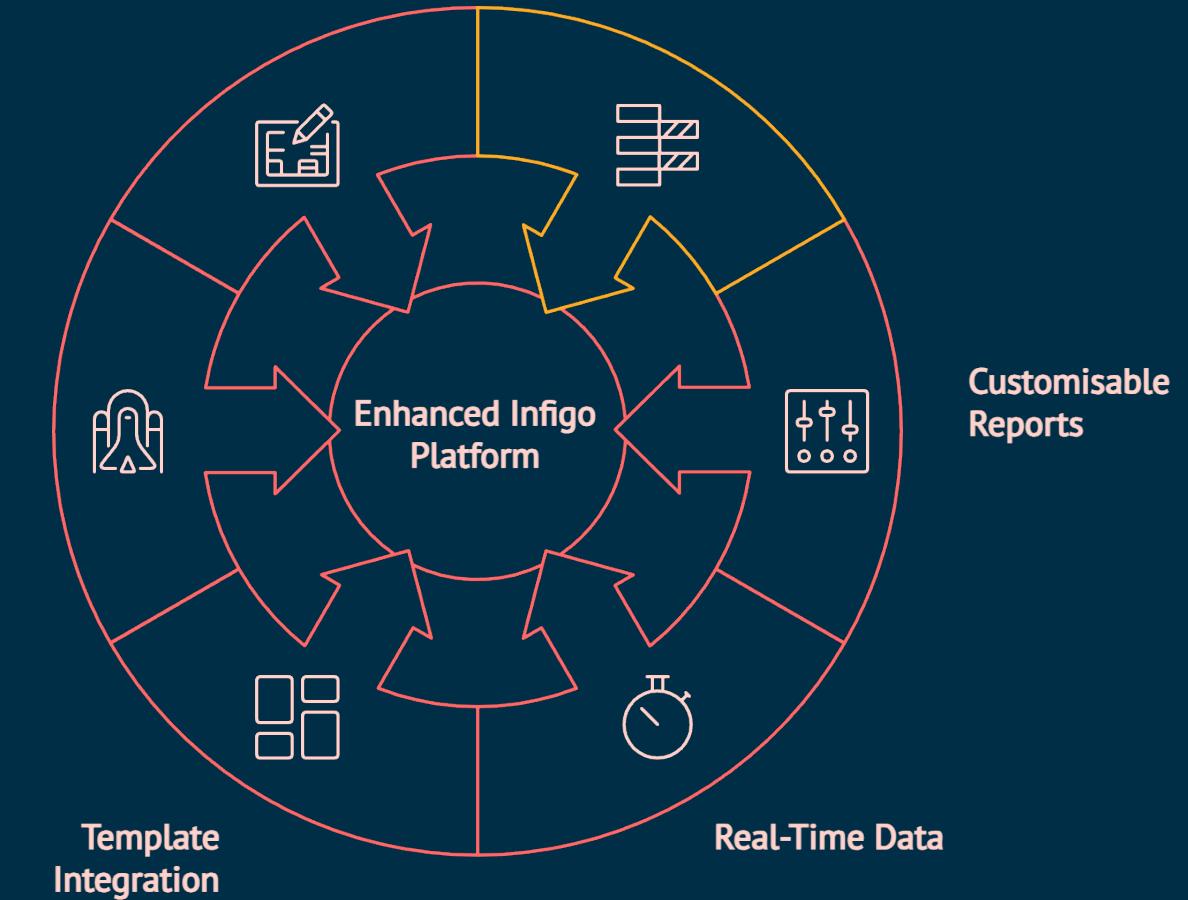
Integration Capabilities

Insights is capable of reporting data drawn from all corners of your Infigo storefronts.

- Product catalogues
- Customer databases
- Order details
- Login history
- Connect Link information
- Attribute information

And much, much more. All this gives you a complete overview of your Infigo ecosystem, and allows you to build powerful reports and structures.

Flexible Plans



Customisable Reports

Every Infigo platform is shipped with some standard reports and dashboards.

With higher tiers, create fully customized report templates using the specialized Metabase platform.

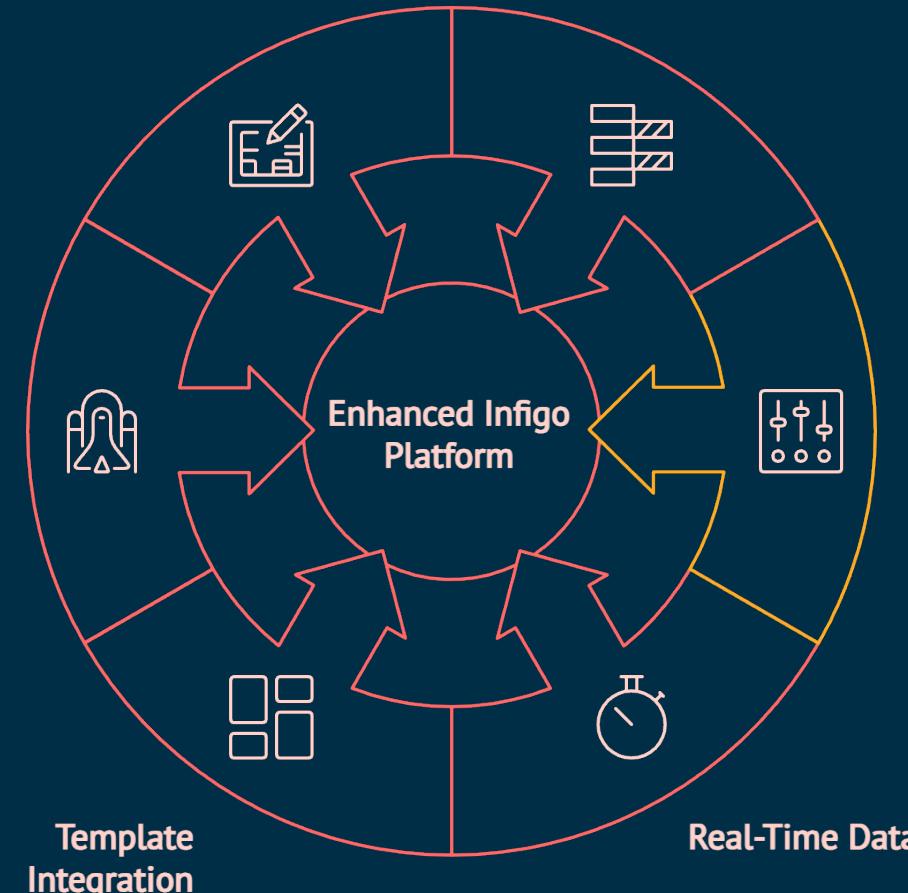
Include data relevant to you and display it in a huge manner of different ways.

Deep dive into data to gain even more insights.

Flexible Plans

Data Integration

Future-Ready



Real-Time Data

No waiting for reports to update, Infigo Insights always provides you with up to date information.

Drawn straight from your Infigo storefronts.

Displayed straight on your customized templates.

Future-Ready

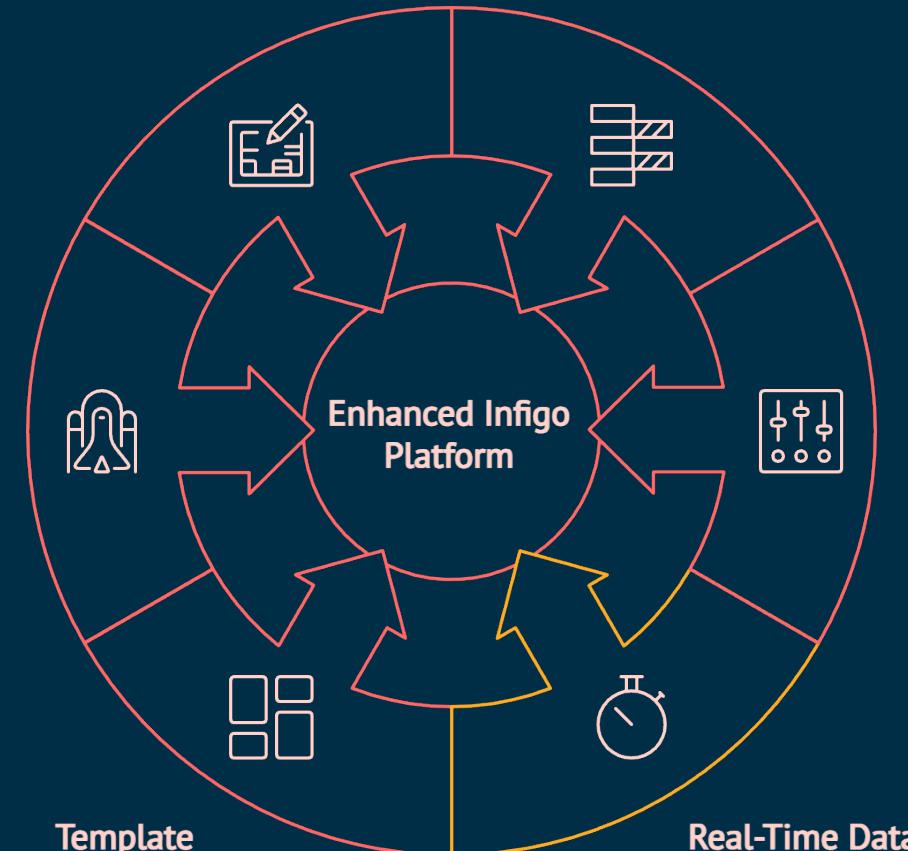
Flexible Plans

Data Integration

Customisable Reports

Template Integration

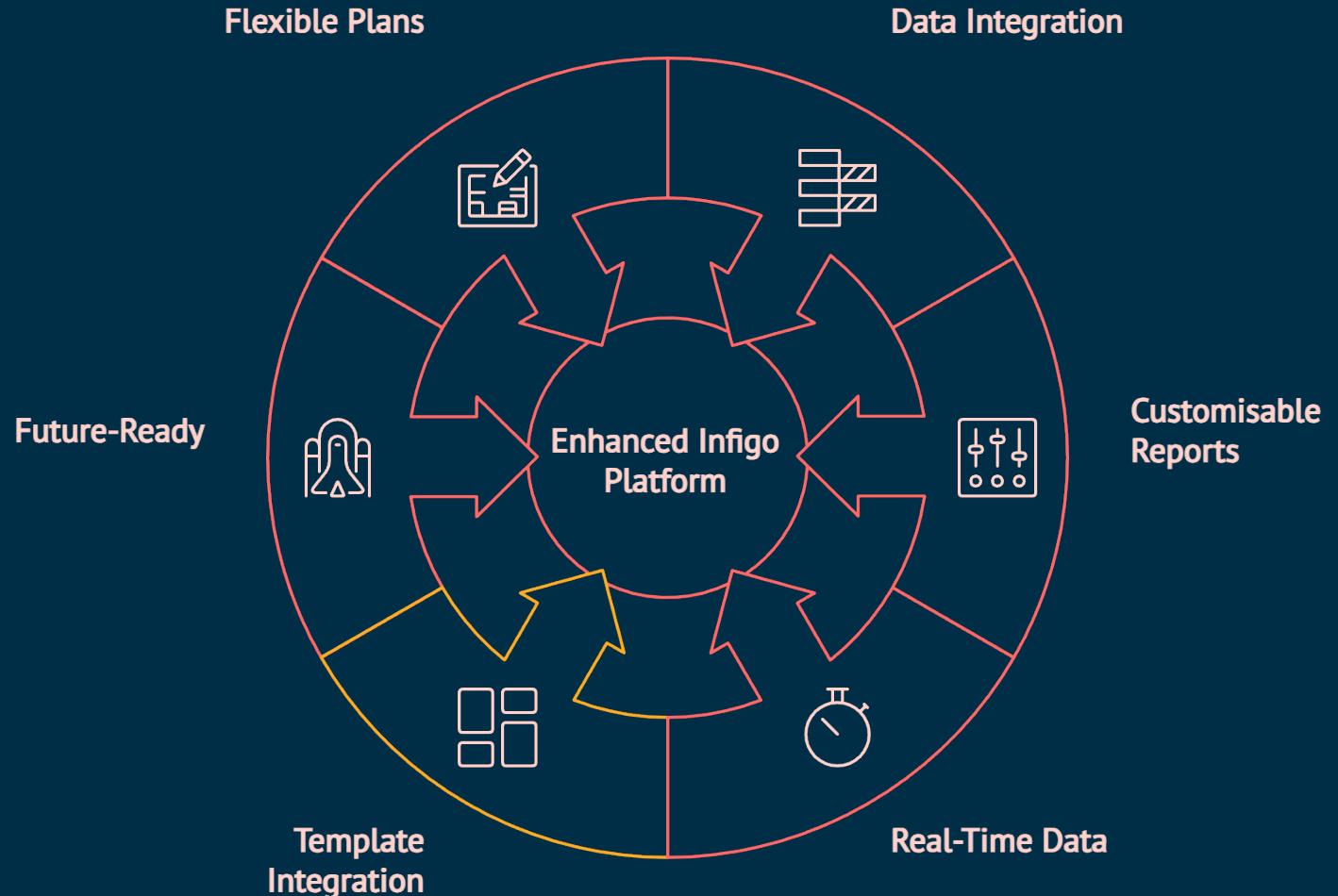
Real-Time Data



Template Integration

Access your standard and custom reports and display your dashboards inside Infigo admin (with the appropriate tier).

Instant access to high-quality, real-time data without leaving your platform.

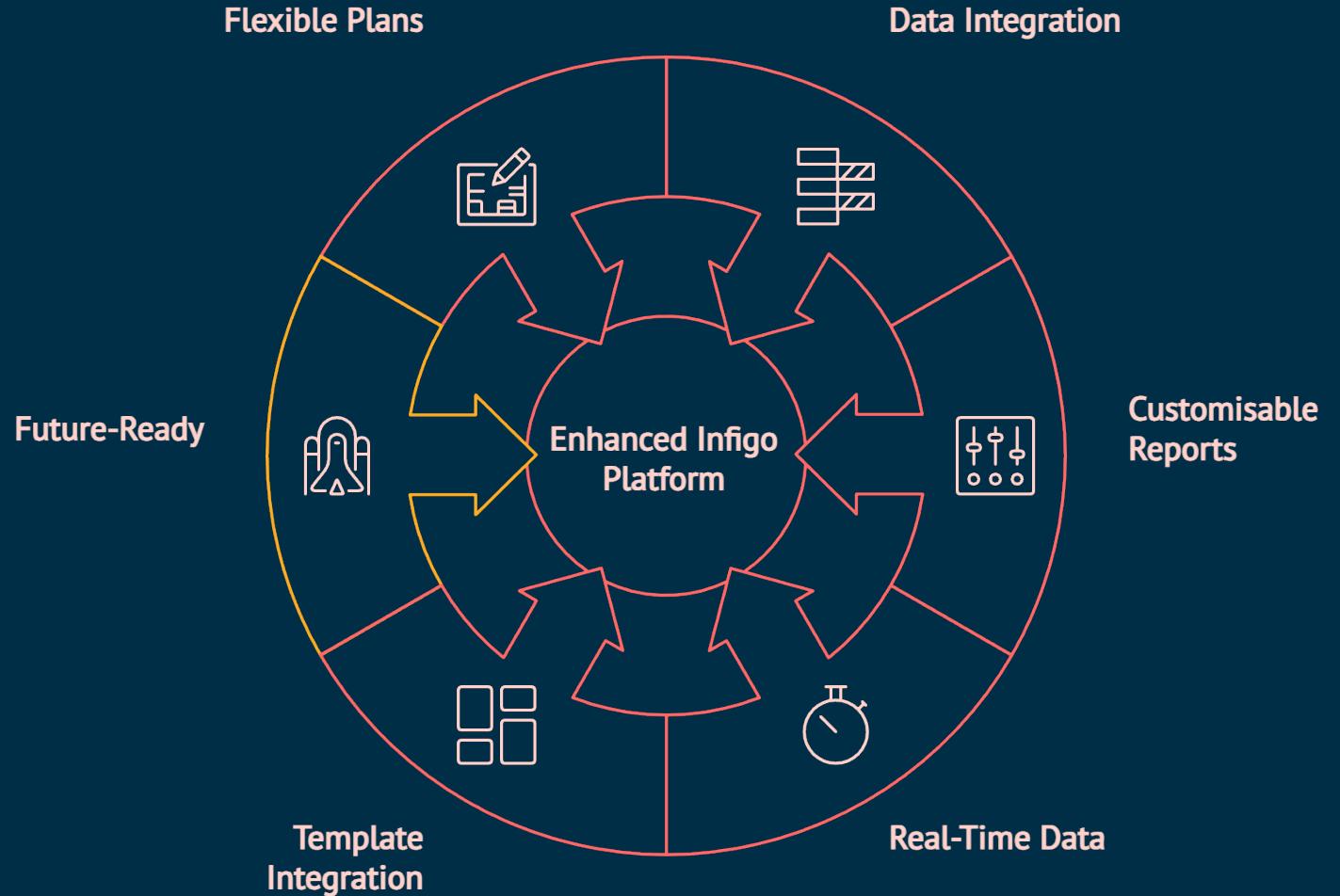


Future-Ready

Built to adapt and grow to your business demands.

Infigo Insights is fully flexible tool, allowing you to design, create, view and distribute simple reports or complex dashboards at the few clicks of a button.

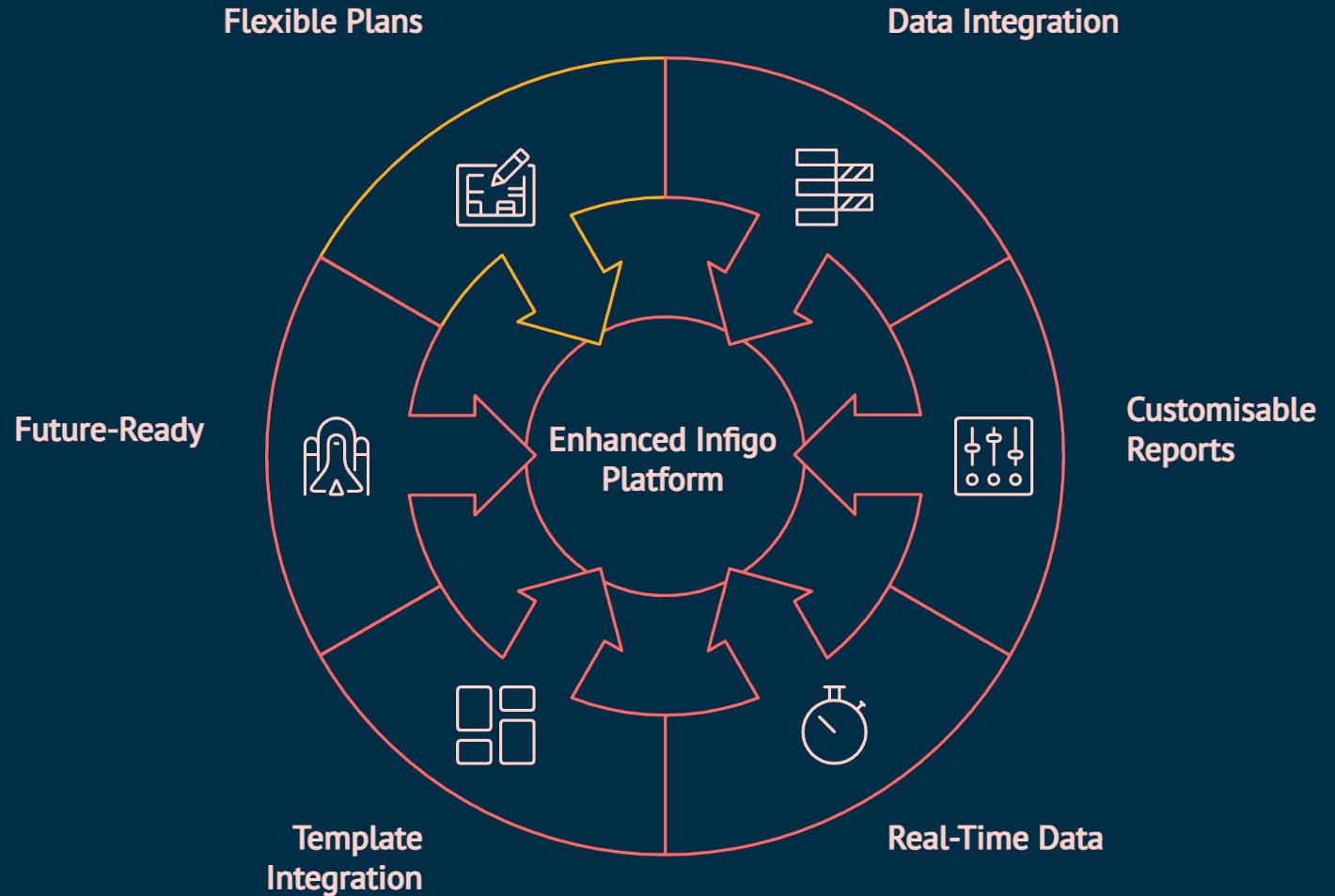
Suitable for all user skill levels, with reports created via SQL or via provided report building tools.



Multiple Plans

Different levels to suit your needs.

From default, in-built standard reports to a fully customisable Metabase environment with advanced report and dashboard sharing capabilities.



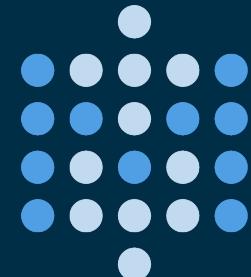
Features	Out of the box	Pro	Pro+	Enterprise
Default reports	✓	✓	✓	✓
Default dashboards	✓	✓	✓	✓
Ability to create custom simple reports		✓	✓	✓
Ability to create custom advanced reports		✓	✓	✓
Ability to import custom reports into Infigo's platform		✓	✓	✓
Ability to create custom dashboards		✓	✓	✓
Ability 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



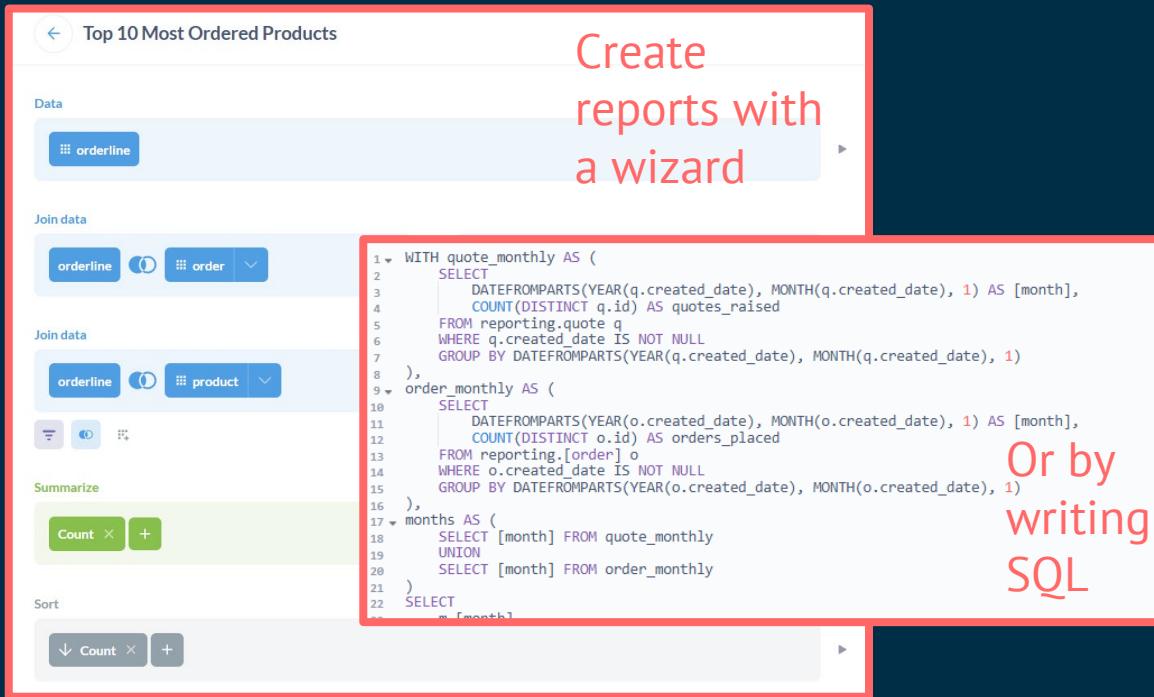
A C A D E M Y

Using Metabase for Insights

- **Analytics engine behind Insights**
 - Reporting and analytics tool Infigo uses to power Insights.
- **Directly linked to your Infigo data**
 - Works on your storefront data to answer business questions.
- **Custom, flexible reporting**
 - Build bespoke reports and dashboards that go beyond the standard “out-of-the-box” reports.
 - Filter, slice and drill into data to focus on specific customers, products, time periods or behaviours.
- **Delivering insights to your team**
 - Export data or schedule reports to support decision-making, optimisation and ROI tracking across your Infigo storefronts.
- **Available as an add-on**
 - Offered by Infigo as a purchasable reporting tool for customers who need deeper analysis than standard Insights reports.



Metabase



The screenshot shows the Infigo Insights interface with the following components:

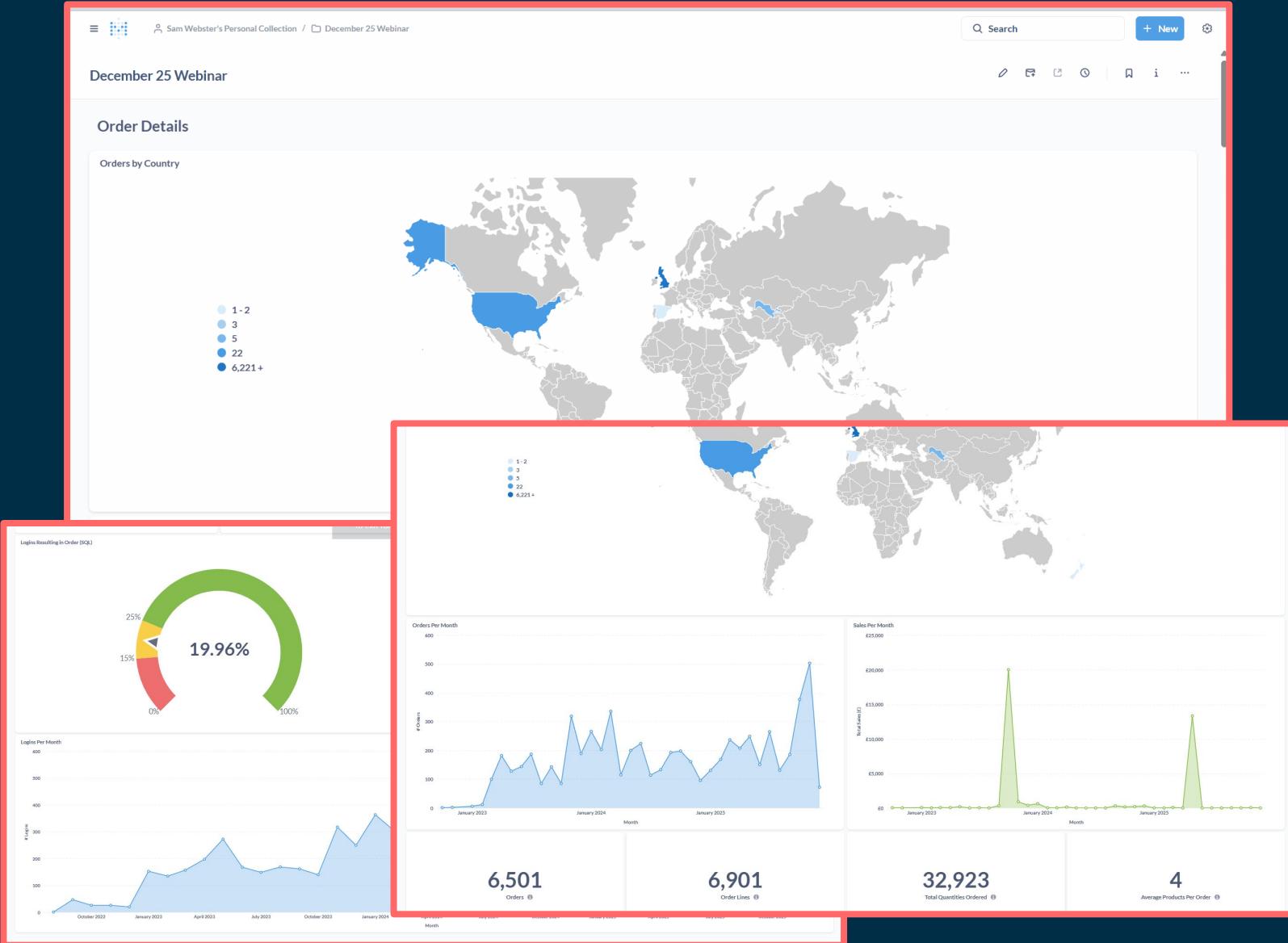
- Create reports with a wizard:** A callout box pointing to the top navigation bar where "orderline" is selected.
- Or by writing SQL:** A callout box pointing to the SQL editor area containing the following custom SQL query:

```

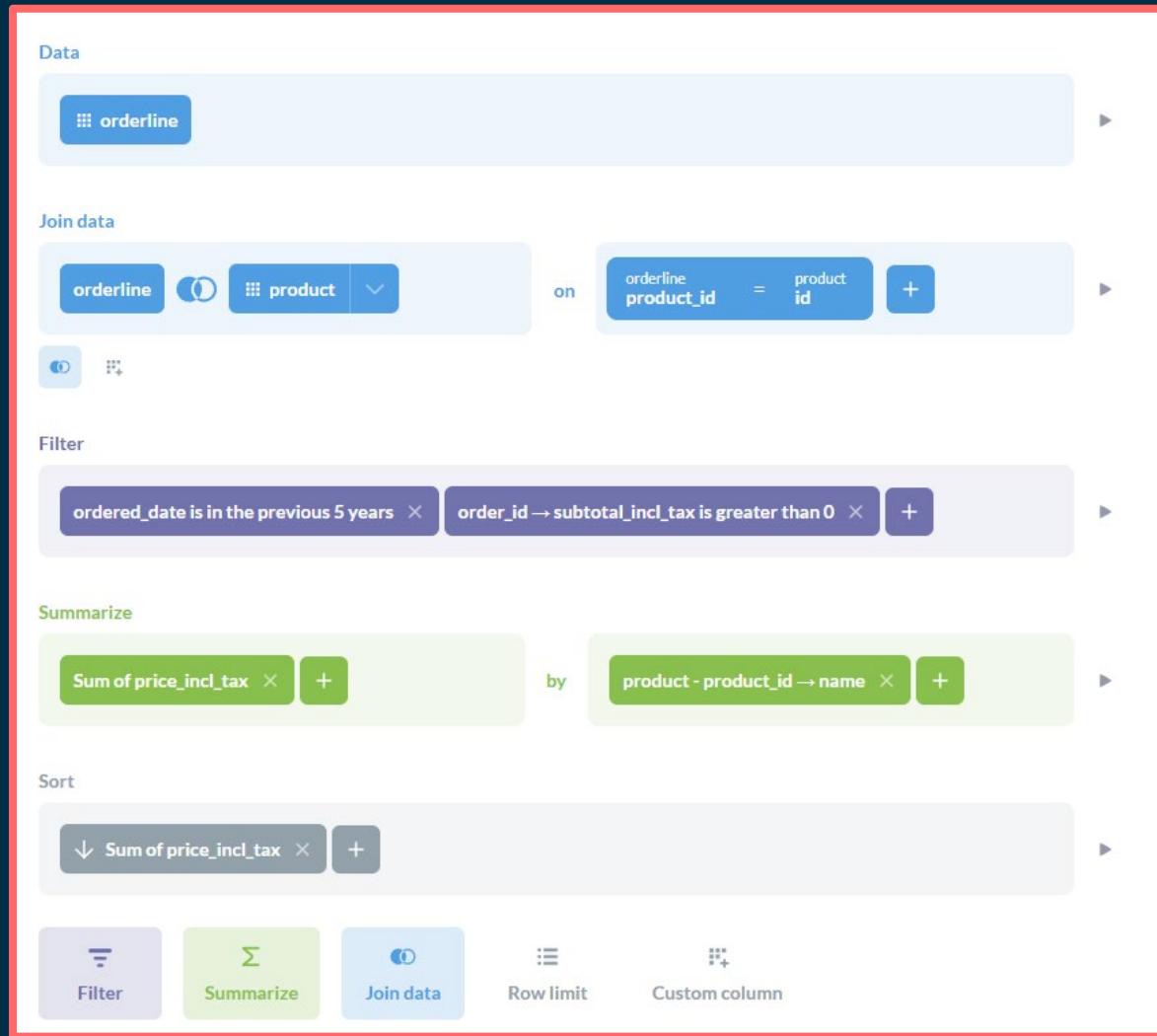
1 WITH quote_monthly AS (
2     SELECT
3         DATEFROMPARTS(YEAR(q.created_date), MONTH(q.created_date), 1) AS [month],
4         COUNT(DISTINCT q.id) AS quotes_raised
5     FROM reporting.quote q
6     WHERE q.created_date IS NOT NULL
7     GROUP BY DATEFROMPARTS(YEAR(q.created_date), MONTH(q.created_date), 1)
8 ),
9 order_monthly AS (
10    SELECT
11        DATEFROMPARTS(YEAR(o.created_date), MONTH(o.created_date), 1) AS [month],
12        COUNT(DISTINCT o.id) AS orders_placed
13    FROM reporting.order o
14    WHERE o.created_date IS NOT NULL
15    GROUP BY DATEFROMPARTS(YEAR(o.created_date), MONTH(o.created_date), 1)
16 ),
17 months AS (
18    SELECT [month] FROM quote_monthly
19    UNION
20    SELECT [month] FROM order_monthly
21 )
22 SELECT m.[month]
  
```



- Also known as **Questions** in Metabase.
- Sit right at the heart of Infigo Insights capabilities.
- Infigo contains a few out-of-the-box standard reports.
- A single report will provide a single snapshot of data. *E.g. a chart or a table.*
- A report can contain information drawn from multiple databases.
- Data can be filtered, sorted, summarized, refined and much more to show just the sort of information you need rather than expansive, unnecessary data sets.
- Reports can be generated with custom SQL or using comprehensive reporting tools.



- Put simply, **multiple reports combined** into one easy to read page.
- Designed to give you an overview of all data important to you and your business.
- Create customized dashboards inside Metabase, where you can control the size and position of the different reports to make things just as visible as you need them.
- Create tabs, sections, headers and more to create crystal clear layouts.



The screenshot shows the Metabase interface for building a report. The 'Data' section contains a single dataset named 'orderline'. The 'Join data' section shows a join between 'orderline' and 'product' tables on the condition that 'orderline.product_id' equals 'product.id'. The 'Filter' section includes two filters: 'ordered_date is in the previous 5 years' and 'order_id → subtotal_incl_tax is greater than 0'. The 'Summarize' section shows a summary of 'Sum of price_incl_tax' grouped by 'product - product_id → name'. The 'Sort' section sorts the results by 'Sum of price_incl_tax'. At the bottom, there are buttons for 'Filter', 'Summarize', 'Join data', 'Row limit', and 'Custom column'.

- Metabase contains high quality report building wizard tools, meaning detailed reports and templates can be created without having to write any code at all.
- Specify important fields, summarise, filter and much more in order to get the data in the exact format required.
- Create custom columns and calculations if what you're after isn't available in the default set.

Let's take a look at a few examples from our demonstration dashboard:

- Orders per Month (Simple)
- Top 10 Most Ordered Products (More Complex)
- Average Time to Ship (Custom)

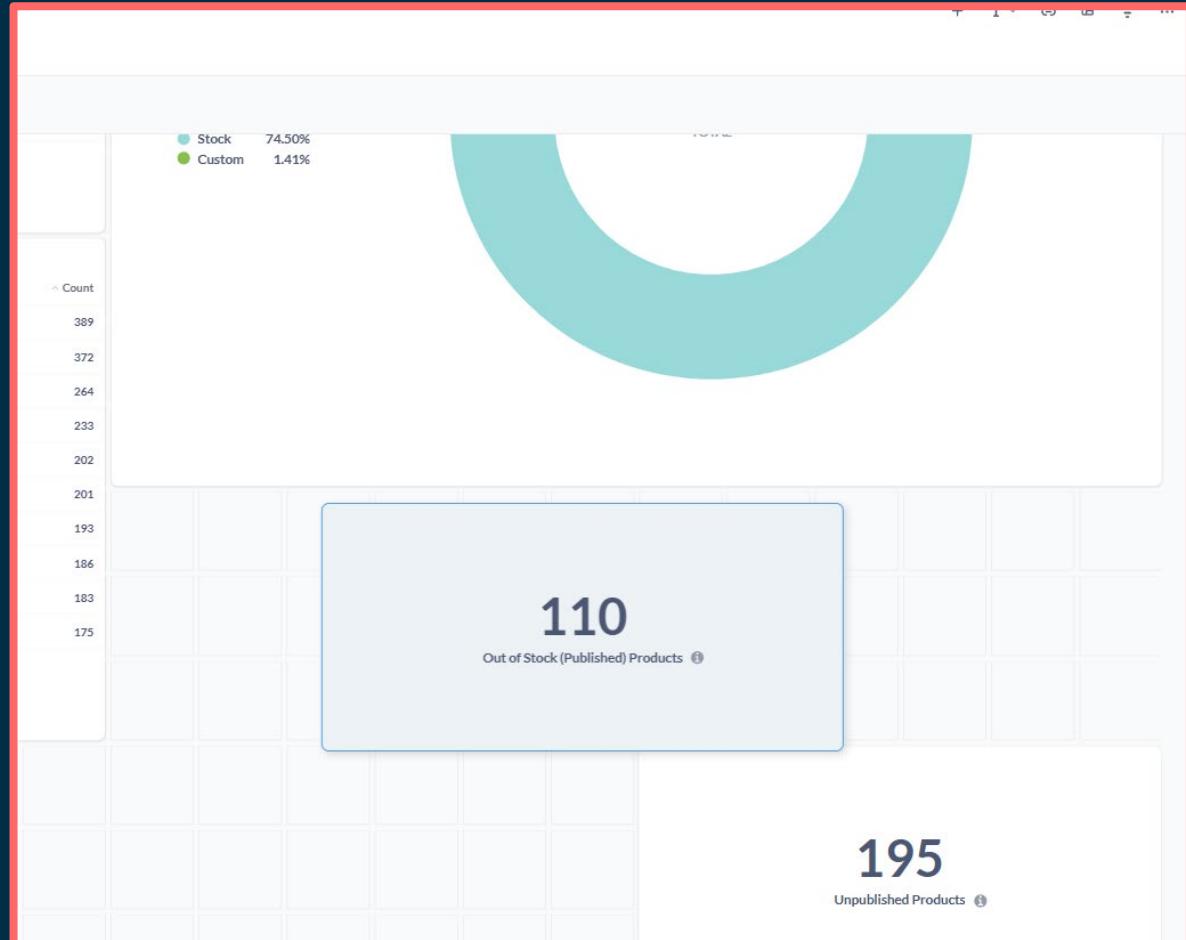
SQL for this question

```
1  SELECT
2    "product - product_id"."name" AS "product - product_id_name",
3    SUM("reporting"."orderline"."price_incl_tax") AS "sum"
4  FROM
5    "reporting"."orderline"
6
7  LEFT JOIN "reporting"."product" AS "product - product_id" ON "reporting"."orderline"."product_id" = "pro
8  LEFT JOIN "reporting"."order" AS "order_via_order_id" ON "reporting"."orderline"."order_id" = "order
9  WHERE
10  (
11    "reporting"."orderline"."ordered_date" >= CAST(
12      DATEFROMPARTS(YEAR(DATEADD(year, -5, GETDATE())), 1, 1) AS datetime2
13    )
14  )
15
16  AND (
17    "reporting"."orderline"."ordered_date" < CAST(DATEFROMPARTS(YEAR(GETDATE()), 1, 1) AS datetime2)
18  )
19  AND ("order_via_order_id"."subtotal_incl_tax" > 0)
20 GROUP BY
21  "product - product_id"."name"
22 ORDER BY
23  "sum" DESC,
24  "product - product_id"."name" ASC
```

- For those with the in-house skills (or for keen users of AI), reports can also be constructed by direct input of SQL code.
- Bypass the manual configuration process and add additional complexity to your reports.

Let's take a look at an example:

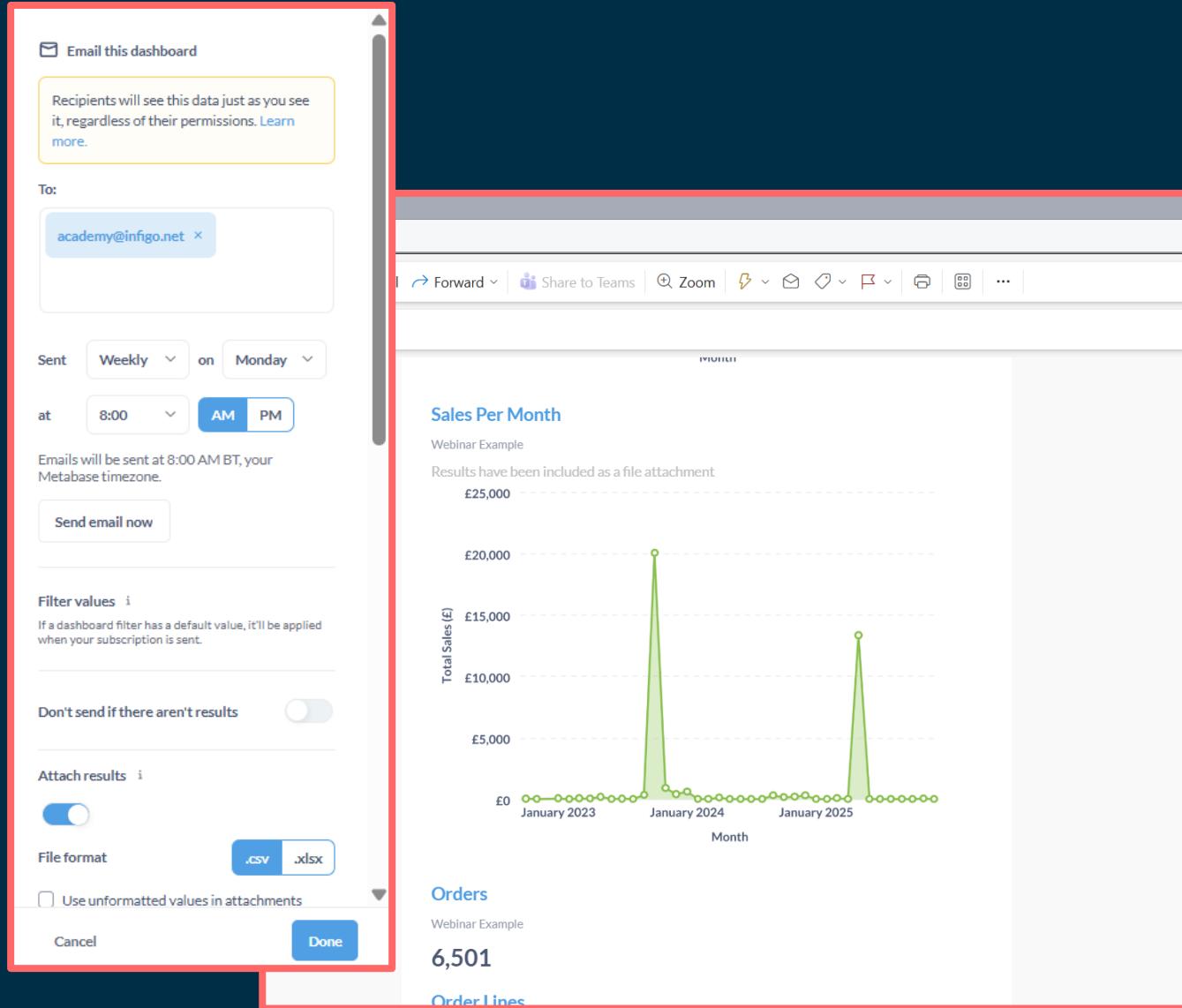
- Logins Resulting in Orders



- Once you've created a few "Questions" in Metabase, you might consider merging them into an easy viewable Dashboard.
- Creating these dashboards is a simple drag, drop and resize process for your chosen questions to get the layout you want.

Let's take a look at an example:

- [Webinar Example Dashboard](#)



The screenshot shows the Metabase Email Subscription settings on the left and a dashboard preview on the right.

Email this dashboard settings (left):

- Recipients will see this data just as you see it, regardless of their permissions. [Learn more](#).
- To: academy@infigo.net
- Sent: Weekly on Monday at 8:00 AM
- Emails will be sent at 8:00 AM BT, your Metabase timezone.
- Send email now
- Filter values: If a dashboard filter has a default value, it'll be applied when your subscription is sent.
- Don't send if there aren't results:
- Attach results:
- File format: .csv (selected) .xlsx
- Use unformatted values in attachments
- Cancel Done

Sales Per Month dashboard preview (right):

Webinar Example

Results have been included as a file attachment

Total Sales (£)

£25,000

£20,000

£15,000

£10,000

£5,000

£0

January 2023 January 2024 January 2025

Month

The chart shows two sharp peaks in sales. The first peak in January 2024 reaches approximately £20,000. The second peak in January 2025 reaches approximately £14,000. Sales are generally low throughout the year, with small fluctuations.

Orders dashboard preview (right):

Webinar Example

6,501

Order Lines

- Dashboards can have subscriptions applied, meaning an up-to-date set of data is automatically emailed to named addresses at set intervals.
- These provide a great way to keep the relevant people in the know, by pushing it straight to their inbox instead of actively having to seek out the dashboard.

Let's take a look at an example:

- Webinar Example Dashboard



- Take a deeper dive into any data displayed on your reports or dashboards from within Metabase.
- Analyse data in real time and gain a greater understanding.
- Dashboards can have the core data, Metabase can help really understand it.

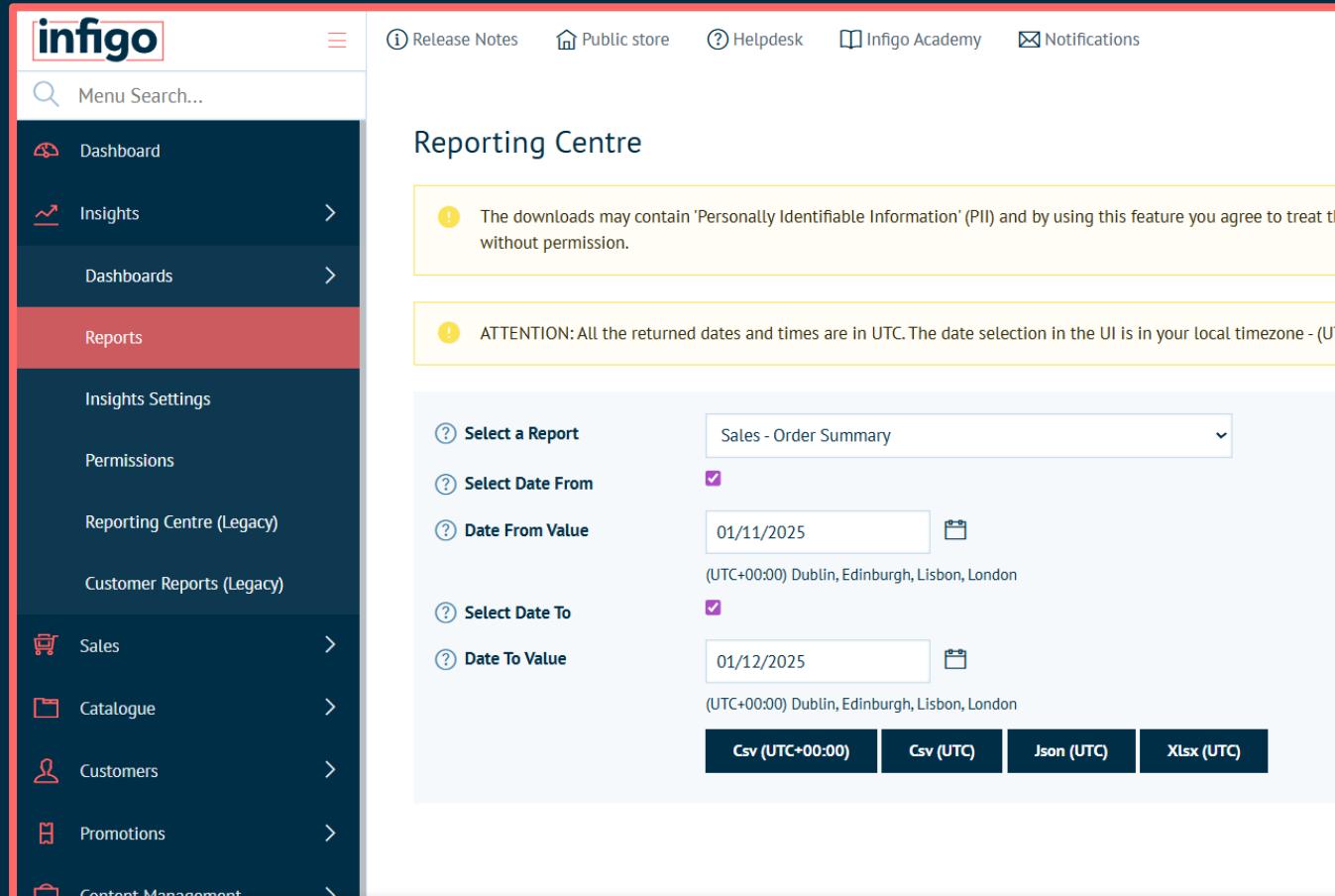
Let's take a look at an example:

- Webinar Example Dashboard



A C A D E M Y

Insights in Infigo Admin



The screenshot shows the infigo Reporting Centre. The left sidebar has a red border around the 'Reports' section. The main area displays a dropdown menu for 'Select a Report' (set to 'Sales - Order Summary'), a date range from '01/11/2025' to '01/12/2025' (both in UTC+00:00), and export options: 'Csv (UTC+00:00)', 'Csv (UTC)', 'Json (UTC)', and 'Xlsx (UTC)'.

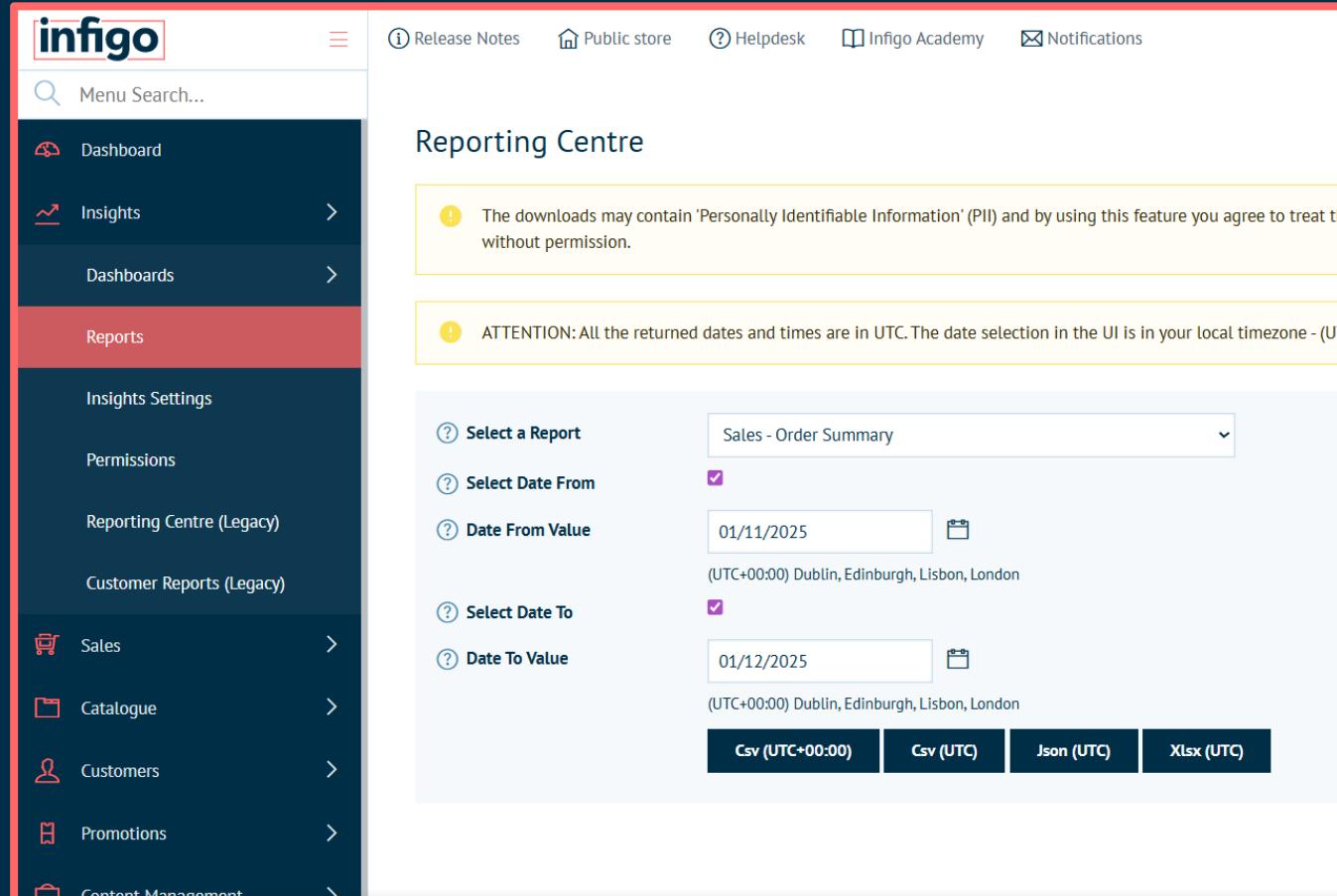
- **Location & purpose**

- Found in Admin → Insights → Reports
- Core Insights feature for pulling storefront usage, customer and sales data

- **Configuration & output**

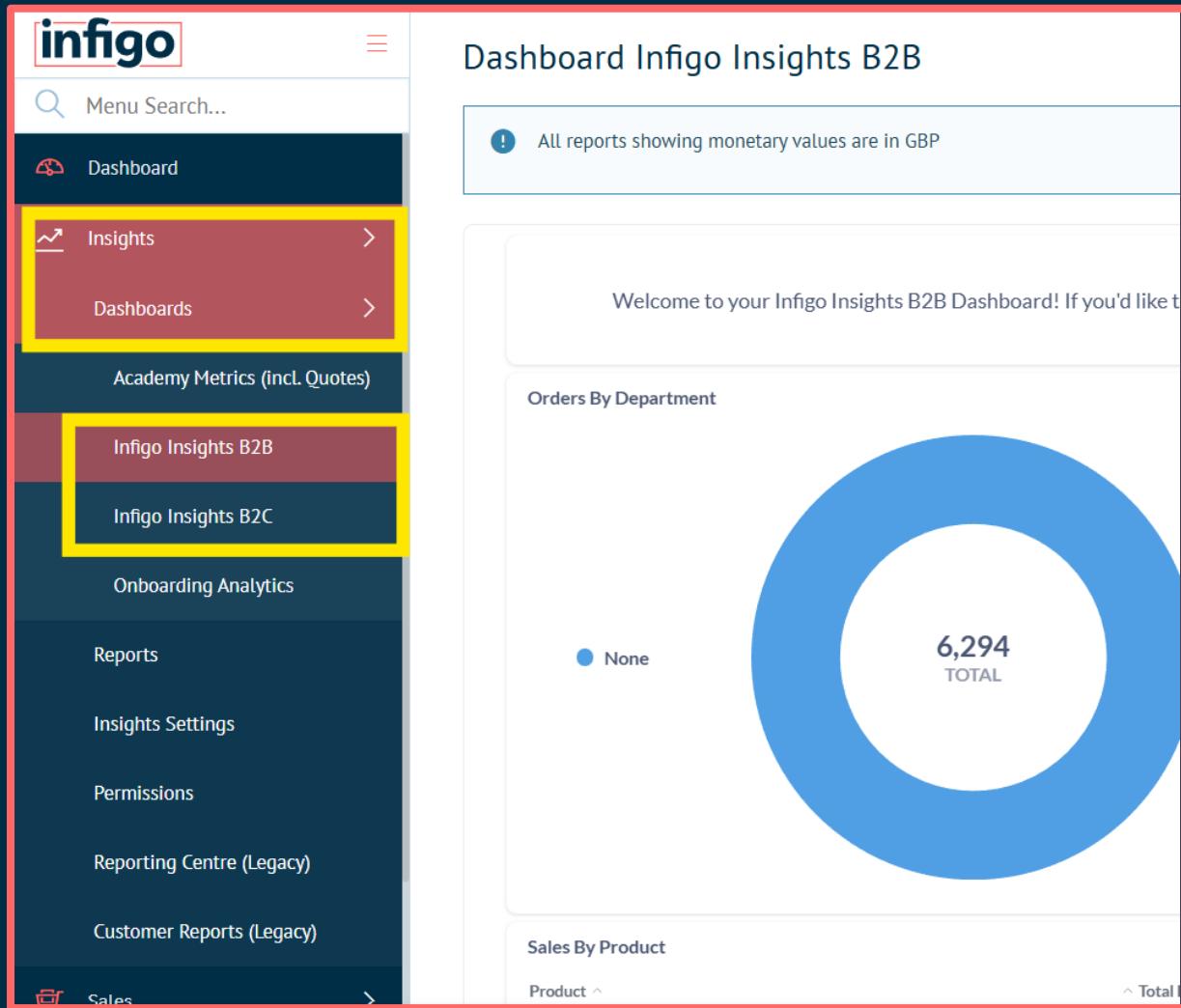
- Set start/end date for each report (date range filter)
- Export formats: CSV, JSON, Excel
- Available report set may vary slightly by storefront go-live date (info correct as of May 2025) All report dates are in UTC

- 6 reports are available by default. Additional standard reports are currently in the trial phase.



The screenshot shows the infigo Reporting Centre. The left sidebar is redacted. The main area has a 'Reporting Centre' title. It contains two informational messages: one about PII and another about date ranges being in UTC. Below these are report selection fields: 'Select a Report' (set to 'Sales - Order Summary'), 'Select Date From' (set to '01/11/2025'), 'Date From Value' (set to '(UTC+00:00) Dublin, Edinburgh, Lisbon, London'), 'Select Date To' (set to '01/12/2025'), and 'Date To Value' (set to '(UTC+00:00) Dublin, Edinburgh, Lisbon, London'). At the bottom are download buttons for Csv (UTC+00:00), Csv (UTC), Json (UTC), and Xlsx (UTC).

- **Standard (Default) Reports – 6 out-of-the-box**
 - **Customer Login Report** – All customers + login activity, incl. last login and login count in period
 - **Customer Report** – Customers created/registered in date range, incl. addresses, last login, active status
 - **Sales** – Order Summary – One row per order; customer, addresses, shipping, payment, totals, etc.
 - **Sales** – Order Line Detail – One row per line item; product info, quantity, discounts, weight, etc.
 - **Department Report** – Departments with cost centre, assigned users, and restricted payment/shipping methods
 - **Product Download Report** – Products with individual download stats (especially for downloadable products)



The screenshot shows the Infigo Admin interface with a sidebar menu and a main dashboard view.

Sidebar Menu:

- infigo
- Menu Search...
- Dashboard
- Insights > (highlighted with a yellow box)
- Dashboards > (highlighted with a yellow box)
- Academy Metrics (incl. Quotes)
- Infigo Insights B2B > (highlighted with a yellow box)
- Infigo Insights B2C > (highlighted with a yellow box)
- Onboarding Analytics
- Reports
- Insights Settings
- Permissions
- Reporting Centre (Legacy)
- Customer Reports (Legacy)
- Sales >

Main Dashboard View:

Dashboard Infigo Insights B2B

All reports showing monetary values are in GBP

Welcome to your Infigo Insights B2B Dashboard! If you'd like to...

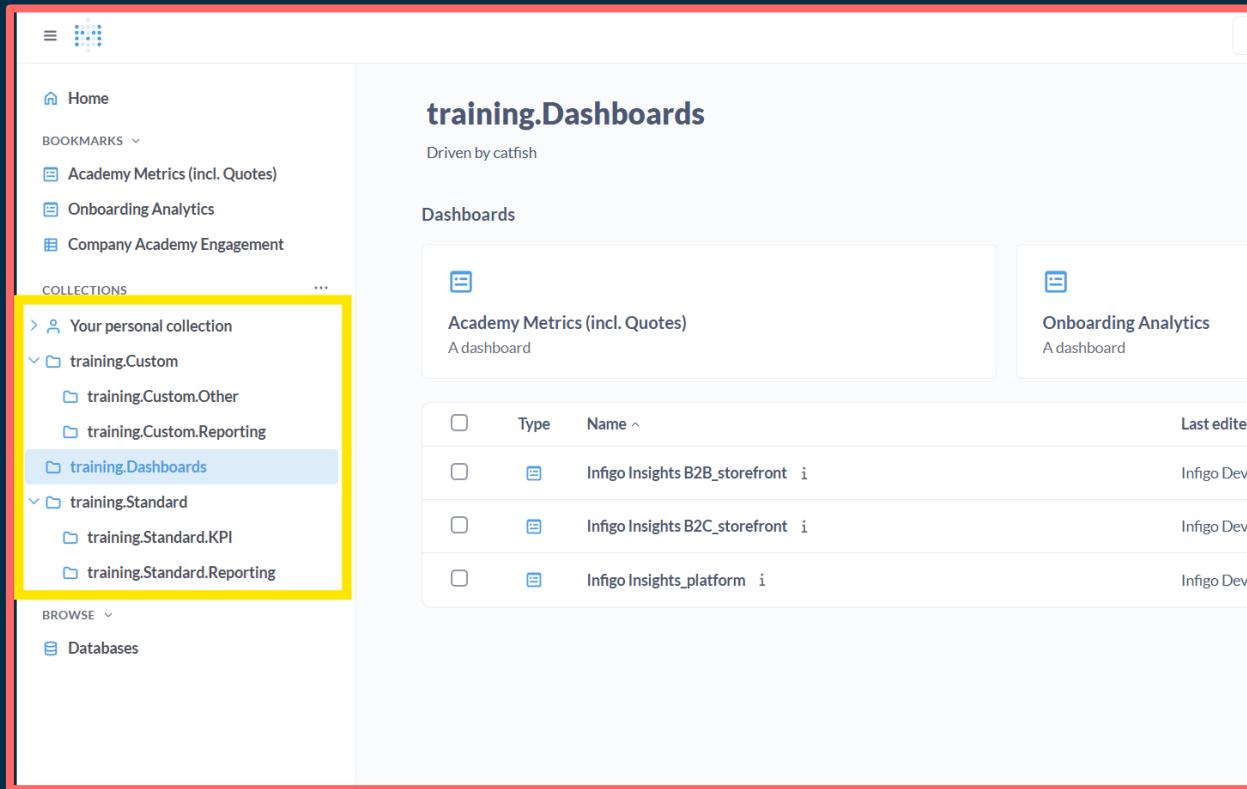
Orders By Department

6,294 TOTAL

Sales By Product

Product ^ Total ^

- Two standard dashboards are available within Infigo Admin.
- These are fixed in format unless you have higher Insights tiers.
- B2B and B2C dashboards available.



The screenshot shows the Infigo Admin interface with a red border. On the left is a sidebar with sections: Home, BOOKMARKS, and COLLECTIONS. The COLLECTIONS section is highlighted with a yellow box and contains items: Your personal collection, training.Custom (which is expanded to show training.Custom.Other and training.Custom.Reporting), training.Dashboards (which is selected and highlighted with a blue box), training.Standard (which is expanded to show training.Standard.KPI and training.Standard.Reporting), and training.Browse (which has Databases listed under it). The main content area is titled 'training.Dashboards' and shows a list of dashboards. One dashboard is visible: 'Academy Metrics (incl. Quotes)' (A dashboard). Below this is a table with four rows, each representing a dashboard:

	Type	Name	Last edited
<input type="checkbox"/>	Dashboard	Infigo Insights B2B_storefront	Infigo Dev
<input type="checkbox"/>	Dashboard	Infigo Insights B2C_storefront	Infigo Dev
<input type="checkbox"/>	Dashboard	Infigo Insights_platform	Infigo Dev

- Your Metabase environment comes preconfigured with several folders for Reports and Dashboards.
- Dropping Reports or Dashboards into these relevant folders will make them available in your Infigo platform.
- Folders appear under [Platform].[Folder].
 - On my `training.infigosoftware.com` platform, for example, the Dashboard folder is *training.Dashboards*
- *Please note: The appropriate Insights tier will be required in order for this to function.*

Adding Permissions to Reports and Dashboards

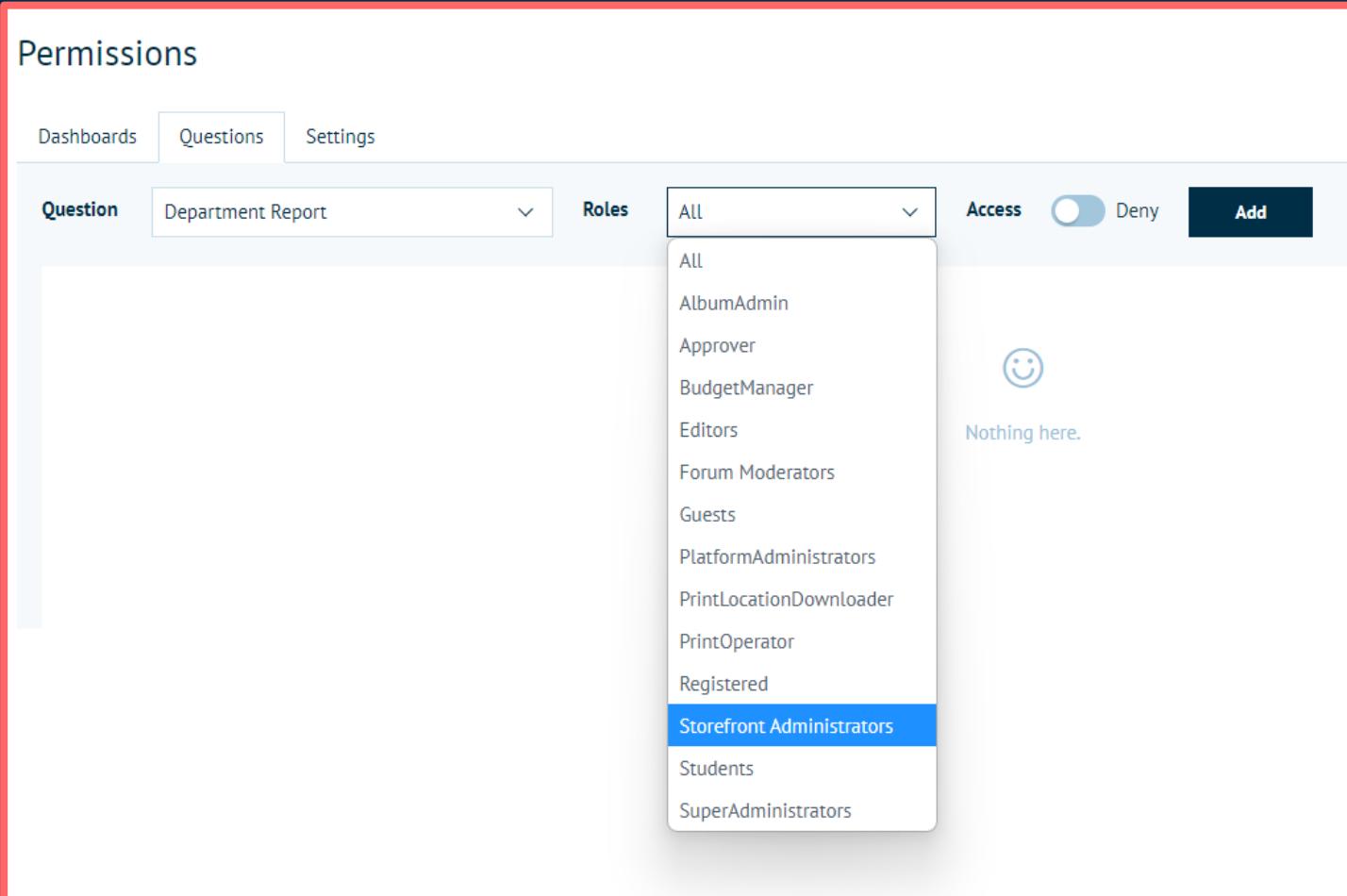
Permissions

Dashboards Questions Settings

Question Department Report Roles All Access Deny Add

All
AlbumAdmin
Approver
BudgetManager
Editors
Forum Moderators
Guests
PlatformAdministrators
PrintLocationDownloader
PrintOperator
Registered
Storefront Administrators
Students
SuperAdministrators

Nothing here.

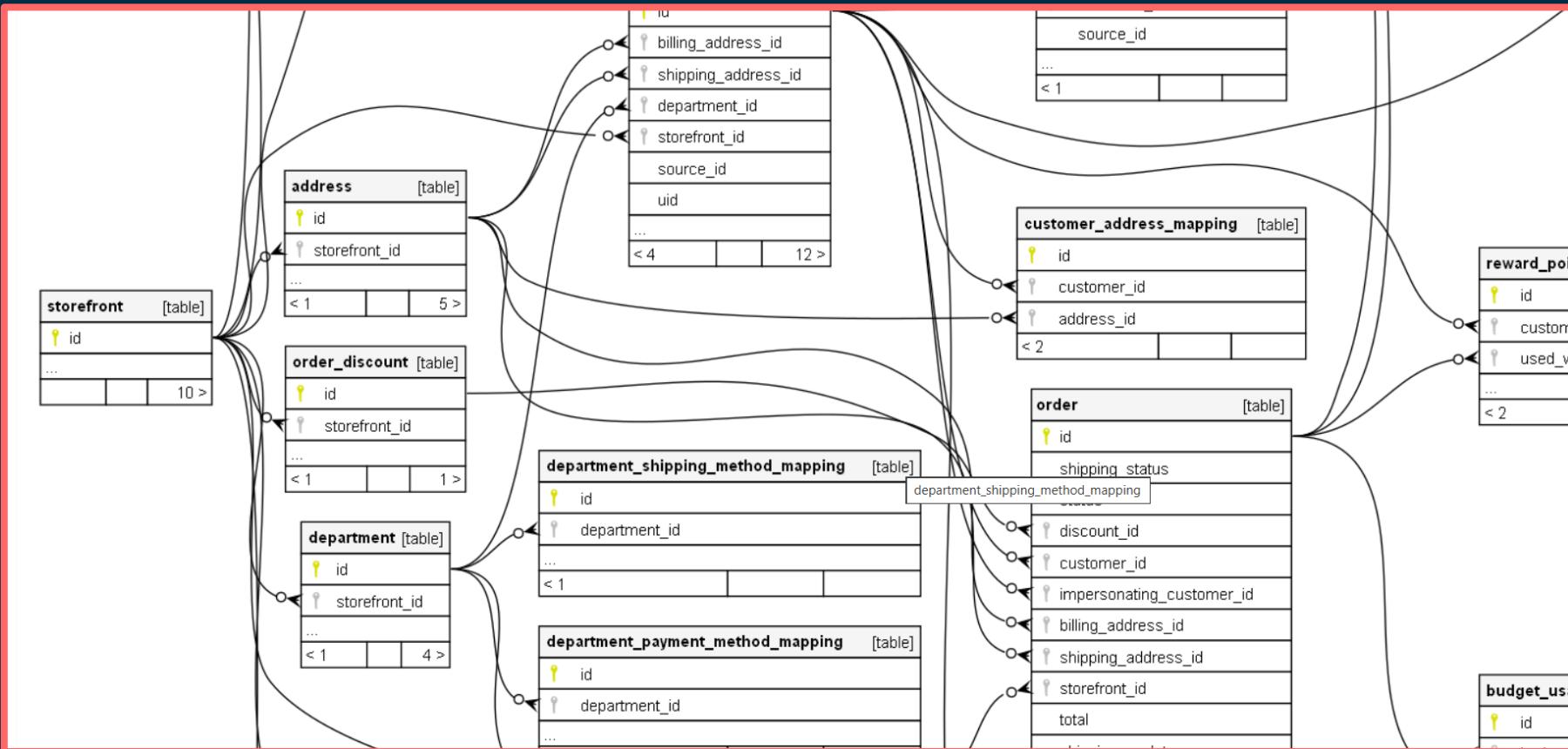


Insights Permissions are designed to control access to specific Insights Reports and Dashboards on the Infigo platform.

Permissions can be applied to a customer role and to either a Dashboard or a Question/Report. These permissions can either provide or deny access to specific data.

Possible to create an “Insights” only view that can access Insights tab in admin without touching other parts of the system. Raise a support ticket for this.

Enterprise users can set custom permissions **inside** the Metabase environment. Guidance in Enterprise article on the Academy.



The Infigo development team have produced a detailed schema for Insights data.

This can provide additional context and understanding as to how data utilized within Insights is connected and related.

Access in the Infigo Academy by searching **“Insights Schema”**

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



A C A D E M Y

Have your Say on Insights



www.infigo.net | +44 (0)330 460 0071 | sales@infigo.net

Unit 10 Enterprise Park, Lewes Road, Lindfield, West Sussex, RH16 2LH