



# Introducing **dash.**

by JUICE BOX | direct



Fully Customizable Dashboards

Integrated, Business-specific Data Sources

Individualized & Blended Metrics

Accessible & Easy to Use

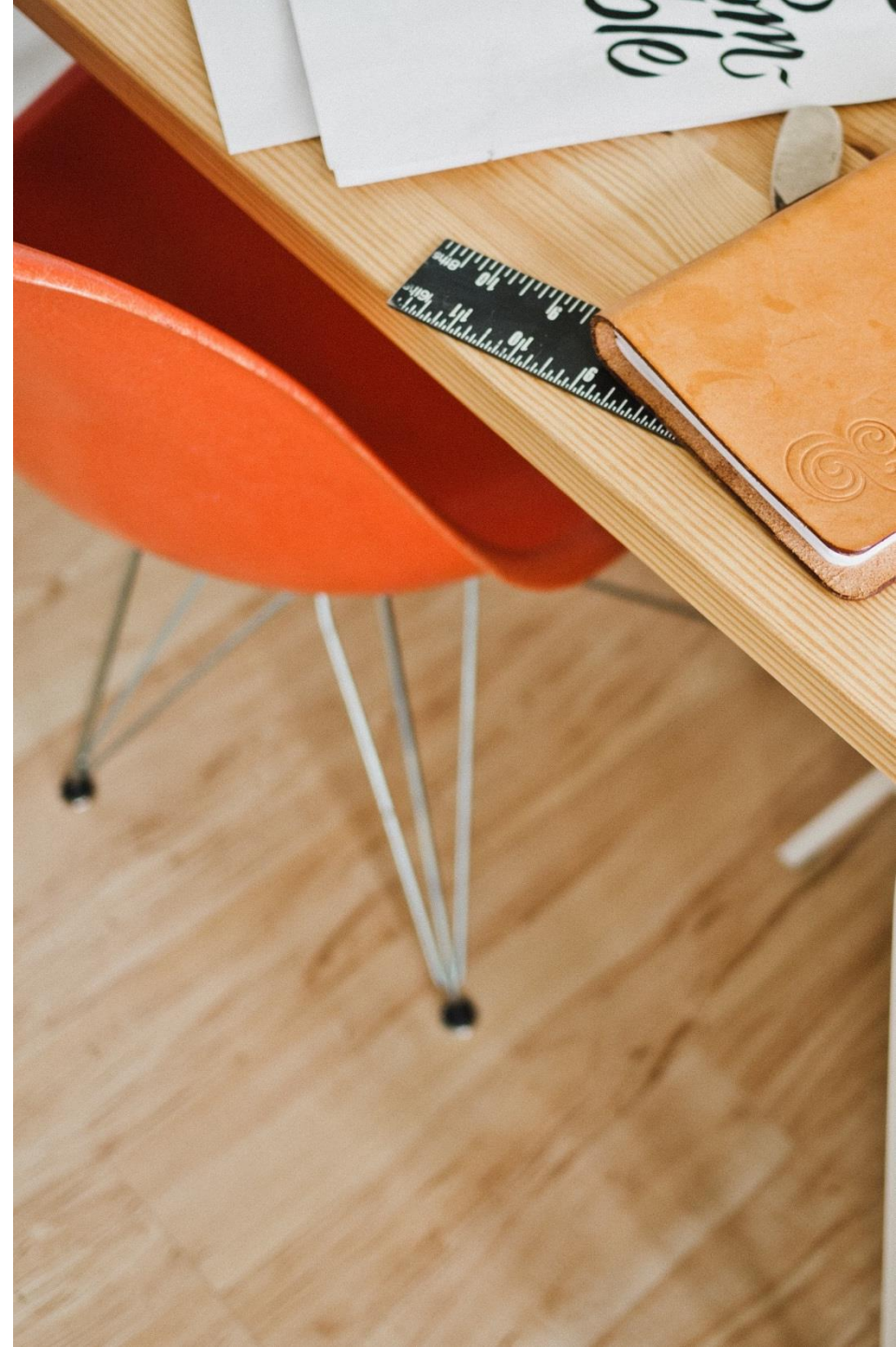
Role-specific, Password Protected

**Providing actionable intelligence for today's winery**

Industry leaders use data to drive strategies, increase accountability, and motivate team performance.

A well-designed dashboard allows leaders to visually organize and display the data to quickly bring trends to light, keep teams focused and allow for winning decisions as the business evolves.

**dash.** is a cloud-based solution providing a visual dashboard of data, allowing brands to quickly identify where to concentrate efforts to improve efficiency and sales. It is designed for anyone who doesn't have robust staffing or more than a few days a month to analyze data – but who understand the value in empowering their teams with information.





# **dash.** turns sales, accounting & customer data into easy-to-understand dashboards that help drive decision-making



**Engage** your organization in driving business success – aligning all teams and functions around key performance indicators

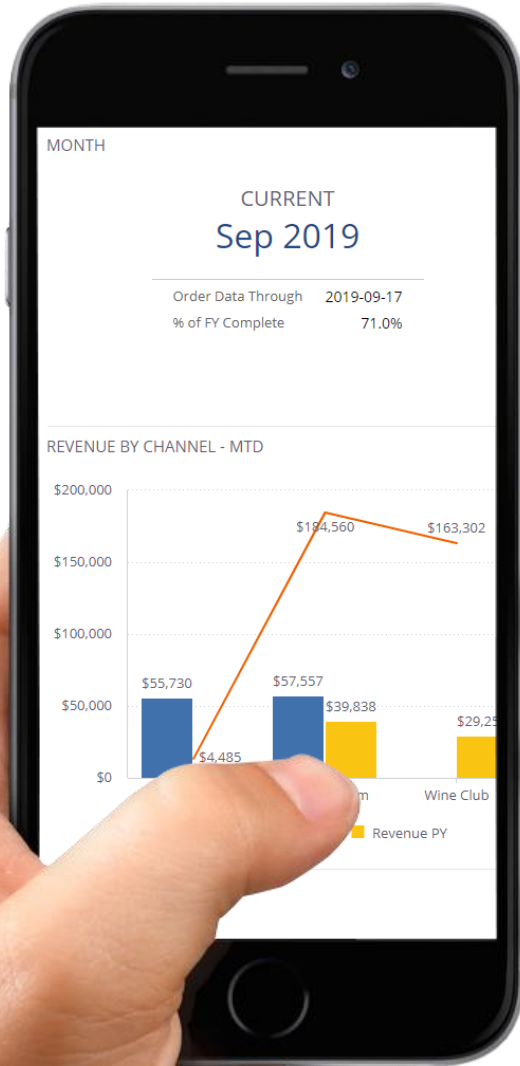


**Empower** team members with relevant & timely information; set goals, track results and refine strategies in real time



**Elevate** your business by quickly identifying trends and using insights to better manage your company towards success

# Fully Customizable & Unique Dashboards



With **dash.**, you can get specific answers to your business questions by blending and comparing data from a variety of sources on fully-customized and unique dashboards. Whether you want to monitor your business by sales channel, by marketing execution, by customer type or more, **dash.** provides insights tailored to your needs.

**dash.** features integrations with wine industry providers like **Commerce7, Wine Direct, eCellar,** and **Figure Commerce,** as well as Google Analytics, MailChimp, Facebook, Twitter, YouTube and more. You can access data from spreadsheets, databases, .CSV files, or any open API. Sales targets & budgets by channel, product, even sales associate can also be integrated for reporting and KPI tracking. Whatever your question or data source, **dash.** can help you find the answer.

# Accessible, Secure & Easy to Use



## Cloud-based Access

via desktop, tablet and mobile platforms, transmitted over the internet via SSL encryption.



## Easy Set Up & Use

Create a clear view of your business without weeks of training or hiring a technical staff to maintain your data.



## Automated & Accessible

Data syncs daily automatically so that dashboards are ready when you are. Schedule emailed .PDF reports daily, weekly or monthly.



## Unlimited Users

Team-based visibility provides your organization with access to password-protected dashboards.

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## Extensive Filtering

Use date filters to review results back in time; filter by channel, sales associate, customer, SKU and many other filters to access exactly the data and results you need.



## Safe & Secure

Dashboards are password-protected with read-only, role-based access to your data.

# User-based Solutions



General Management	Tasting Room	eCommerce	Wine Club	Sales	Marketing	Operations
Identify and monitor the health of your business, by department, by team, by strategy. Achieve competitive advantage with real-time views of the key performance indicators for your business.	Quickly access customer purchasing and conversion activity; how many bottles per order did we sell today? Which products sold best? How are staff performing against goals?	Integrate website, shopping cart, email marketing, social media, Google Adwords and Google Analytics data into one dashboard – to see how each is driving revenue and customer engagement.	Track shipment & incremental purchase behaviors. Monitor member purchasing across multiple channels. Quickly identify conversion, purchasing and tenure trends.	Bring together data from a variety of sources to track shipments, revenue, commissions, product depletions and more. Integrate data across multiple sources to quickly understand trends and refine sales strategies.	Track and identify marketing campaign effectiveness. Monitor customer acquisition rates and costs. Identify market, customer and geographic trends and opportunities.	View operational effectiveness, costs and profit margins. Monitor inventory and identify opportunities to optimize product development, pricing and channel allocation.

## dash.

Fully Customizable | Accessible | Automated | Secure | User-based

# dash. Integrations

**dash.** features standard integrations with wine industry platforms like **Commerce7**, **eCellar**, **Figure Commerce** and **Wine Direct**, as well as **Google Analytics**, **Airtable**, **Google Sheets**, **MailChimp**, **Facebook**, **Twitter**, **YouTube** and more. You can access data from spreadsheets, databases, .CSV files, or build custom integrations with any open API to integrate business-specific data required for your custom reports.

Commerce7

eCellar™

figure

WINE  
DIRECT



Quickbooks  
Online



Google  
Sheets



Salesforce



Google  
Analytics



Google  
AdWords



Instagram



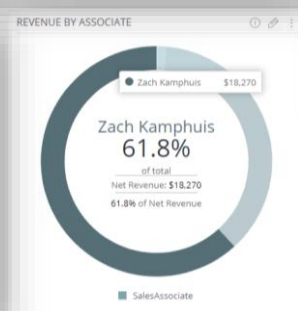
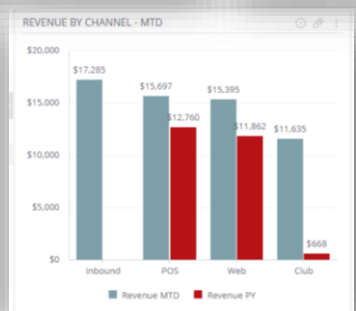
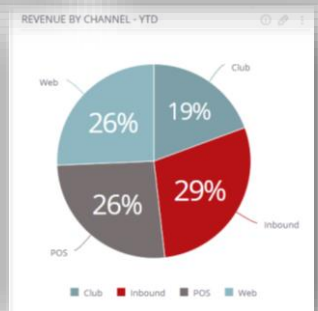
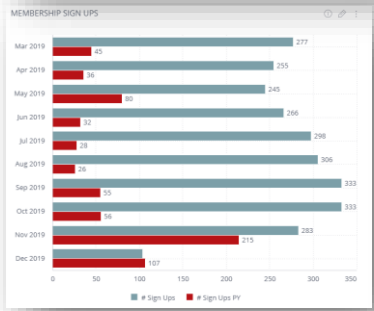
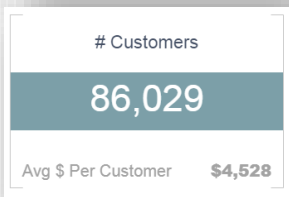
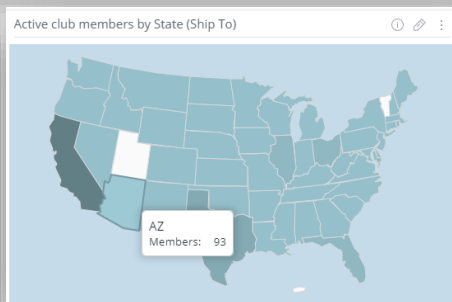
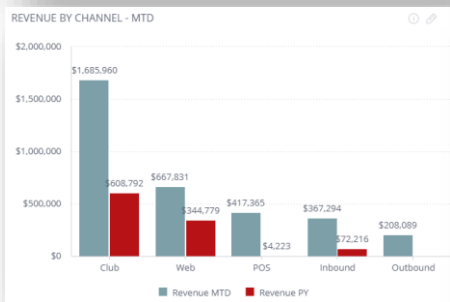
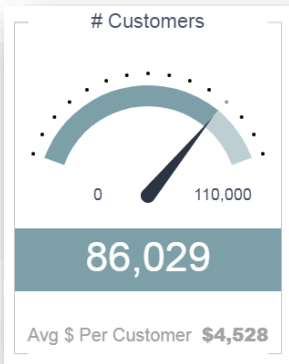
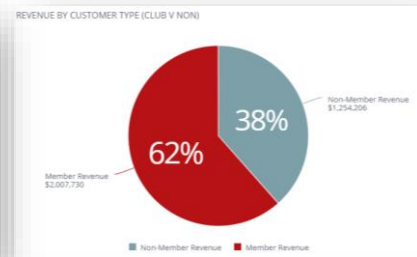
MailChimp



Facebook

# Choose Chart Types, Colors, Layout and More

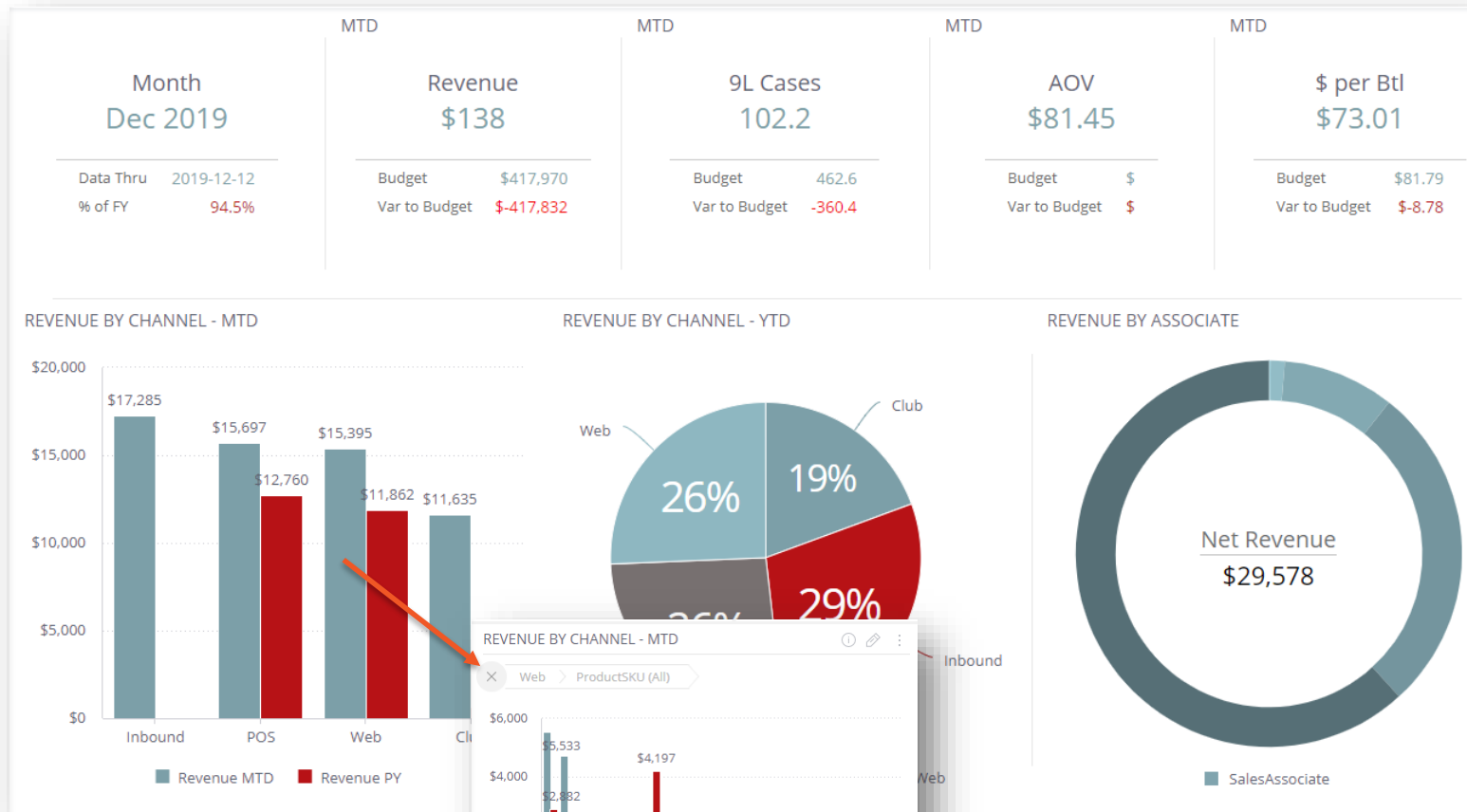
<p><b>Avg Order Value</b> <b>\$51.26</b></p> <p>Budget <b>\$50.86</b> \$ Var to Budget <b>\$0.40</b></p>	<p><b># Btls per Order</b> <b>2.2</b></p> <p>Budget <b>1.1</b> # Var to Budget <b>1.0</b></p>	<p><b>Visitors</b> <b>130,915</b></p> <p>Budget <b>20,870</b> # Var to Budget <b>110,045</b></p>
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- Choose from pre-built metrics
- Build or build & customize your own – color, copy, format



# Drill Into Metrics for More Insight



Drill down to uncover detail by product type, SKU, sales associate and more

# Filter Dashboards for Custom Views



MONTH

Month  
Dec 2019

Data Thru 2019-12-12  
% of FY 11.23%

NET SALES

YEAR TO DATE  
\$1,353,133

FY20 BUDGET \$1,433,796  
\$ Var to Budget -\$80,663  
% of Budget 94.4%

9L CASES SOLD

YEAR TO DATE  
1,638

FY20 BUDGET 1,873.45  
# Var to Budget -235.45  
% of Budget 87.4%

NET SALES

MONTH TO DATE  
\$681,228

MTD FY20 BUDGET \$751,665  
\$ Var to Budget -\$70,437  
% of Budget 90.6%

9L CASES SOLD

MONTH TO DATE  
671.38

MTD FY20 BUDGET 874.79  
# Var to Budget -203.41  
% of Budget 76.7%

## DTC Sales Roll Up

REVENUE BY CHANNEL - YTD

Channel	FY20 Net Sales	FY19 Net Sales	FY20 Budget
Wine Club	\$761,868	\$761,868	
Wine Club Marketing	\$219,822	\$149,646	
eCommerce	\$239,128	\$175,240	
Estate	\$120,581	\$117,936	
Telemarketing	\$33,576	\$11,837	
Events	\$60,588		
Other			

9L CASES SOLD BY CHANNEL - YTD

Channel	FY20 Cases Sold	FY18 Cases Sold	FY20 Budget
Wine Club	796.4	796.4	
eCommerce	403.0	307.0	
Wine Club Marketing	281.1	225.0	
Estate	193.6	130.7	
Telemarketing	113.7	39.2	
Events	48.3	10.8	
Other	0.5	0.1	0.8

CustomerType

Samples/Pours

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OrderPaymentStatus

CREDIT PAID Paid

REFUNDED

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OrderChannel

INTERNAL

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ProductSalesCategory

Freight, Sales Tax and Ot...

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DashboardChannelName

Include all

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Years in Date

This & Last Year

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ClientName

Use pre-set filters (user defined) to manage dashboard data presentation



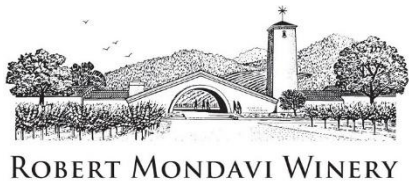
SIMI  
*Winery*



♦ NAPA VALLEY ♦



Sample  
Clients



MEIOMI  
*Coastal California Wines*



the DREAMING TREE  
WINES

## Getting started in 1-2-3...



With **dash.**, it's easy to get your dashboards up and running:

1. Integrate **dash.** with your data sources. We take care of the integration – you simply provide access to the data.
2. Engage with our team to define business-specific logic.
3. Define the KPIs and metrics you want to track. Our team leads a kick off meeting where desired dashboards, users, key metrics and data sources are defined. Select from our database of templates or work with our team to define your own custom reports.
4. Activate your **dash.** reports. Once dashboards are established, online access is granted to users and reports can be scheduled to ensure everyone is focused on the data that matters most.

Dashboards are typically set up in 2-4 weeks, depending upon complexity of desired data and system integrations. API integrations not currently offered by **dash.** may require additional timing and fees for implementation.



We empower wineries to strengthen brand performance and increase sales through compelling, meaningful and unique solutions.

[www.JuiceBoxDirect.com](http://www.JuiceBoxDirect.com) | [www.JuiceBoxDash.com](http://www.JuiceBoxDash.com)

Refreshment for the Wine Industry

Kristi Taaffe | 415.385.1662