Overview

At the start of each new financial year, you will need to define the Year and the Periods in Analytics.

To perform the setup of a new financial year in Analytics:

1. Open the Analytics Report. A message may appear stating that it cannot define the periods, click **yes**.

2. Once the Report loads, click **Setup** > **Setup Years**
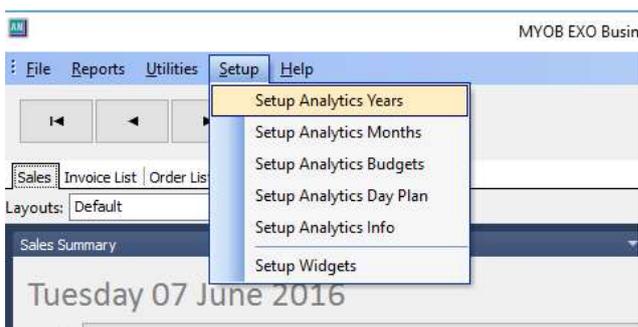
3. You will need to Edit the prior year and call it Year 2019/2020 or similar.
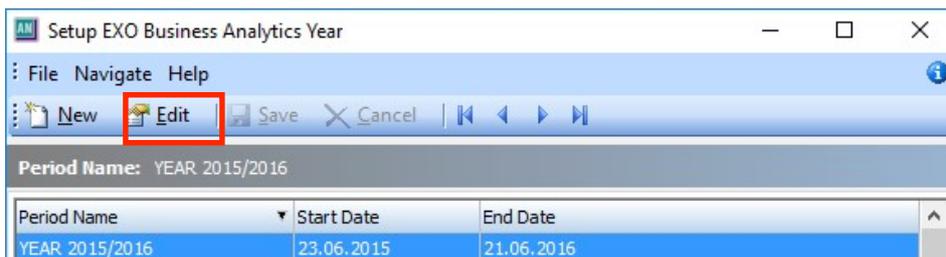
4. Now click **New** to create the new year. The name should state "Current" or "Current 2020/2021".
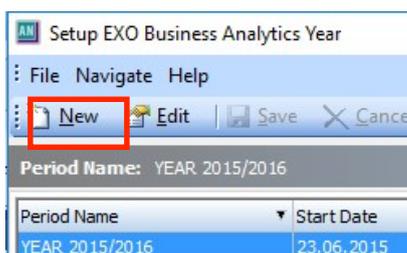
5. Then specify the Start and End dates.

6. Click **Save**.

7. Close the screen and go back to the main Analytics Report screen. Choose **Setup** > **Setup Months**.
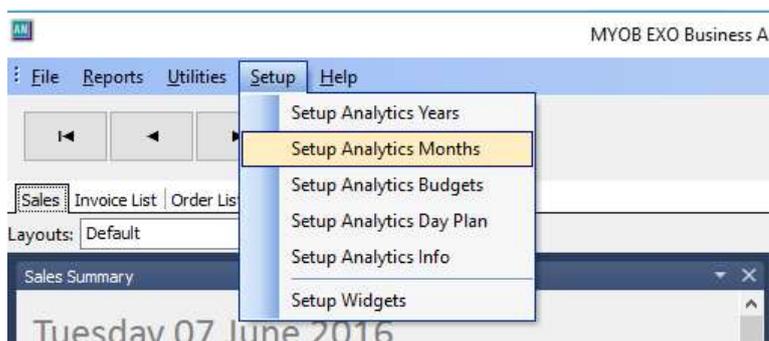
8. Then choose your year on the Sales Year list.

9. Now click **New** and create each of the 12 months that belong to the new year.
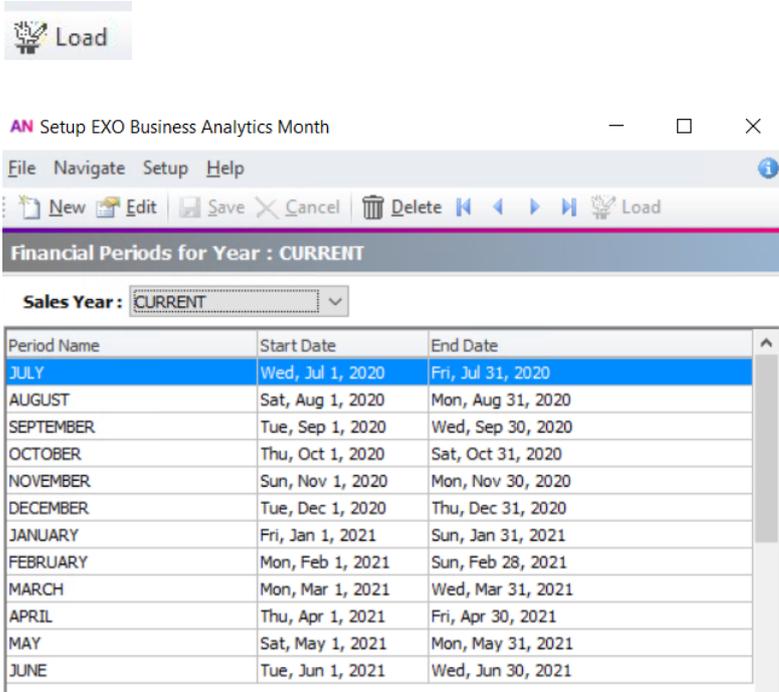
10. Once all 12 have been setup you can close this screen do a FILE / Refresh Settings in Analytics so it picks up the new year.
11. These settings will also be replicated in the Sales Budget area of CRM module if you use this.

12. Close the screen and go back to the main Analytics Report screen. Choose **Setup** > **Setup Analytics Budgets**.
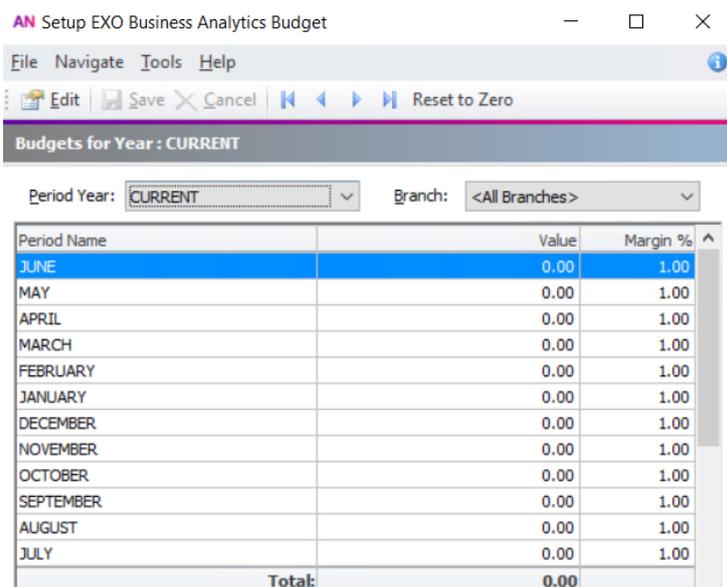
The Budget Setup window lets you set up the budgets and margins for each period. The total of these periods represents the budget for that financial year. You can set budgets and margins for each branch, or for all branches at once.

Double-click on a period to edit the **Value** and **Margin** for that period.

13. Close the screen and go back to the main Analytics Report screen. Choose **Setup** > **Setup Analytics Day Plan**.
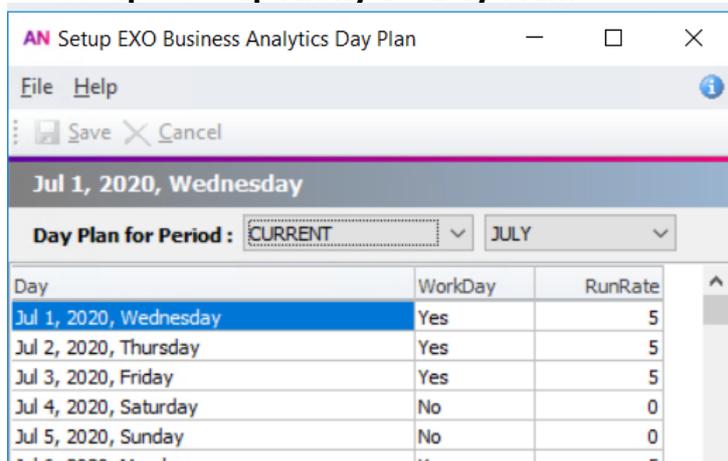
The Period Day Plan Setup window is a day planner that determines workdays, and the weighting to be applied to each workday. For example, a retail business will most likely have a heavy weighting to Saturday, if a large amount of the week's total sales are conducted on a Saturday.

Double-click on the WorkDay value for a day to toggle between "Yes" and "No".

Click on the RunRate value for a day to enter its weighting.