

## Overview

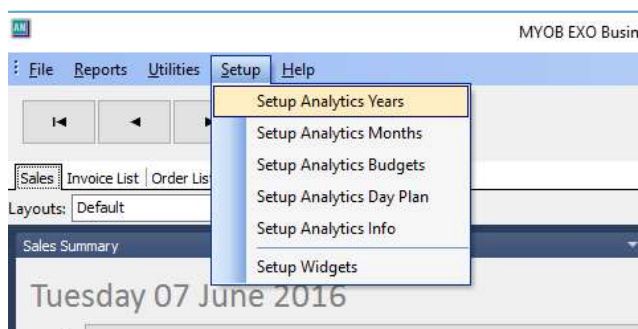
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At the start of each new financial year, you will need to define the Year and the Periods in Analytics.

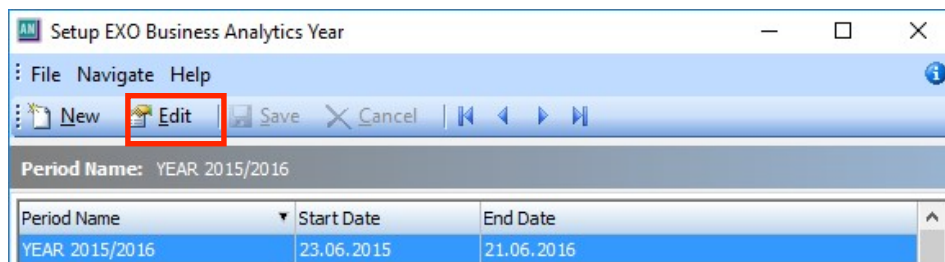
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To perform the setup of a new financial year in Analytics:

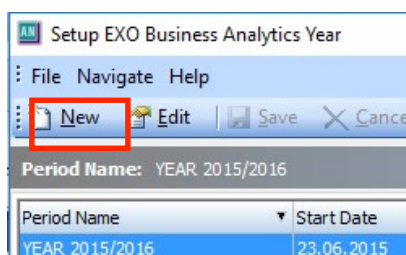
1. Open the Analytics Report. A message may appear stating that it cannot define the periods, click **yes**.
2. Once the Report loads, click **Setup > Setup Years**



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.

AN Setup EXO Business Analytics Year

File Navigate Help

New Edit Save Cancel

Period Name: CURRENT

Edit Financial Year CURRENT

Name  
CURRENT

Start of Financial Year  
01.07.2020

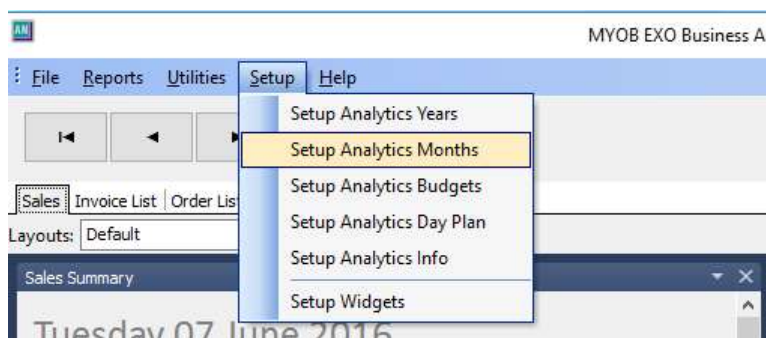
Valid Range for Start of Financial Year  
Wed, Jul 1, 2020 <= Start Year <= Wed, Jul 1, 2020

End of Financial Year  
30.06.2021

Valid Range for End of Financial Year  
Wed, Jun 30, 2021 <= End Year <= Sat, Jan 1, 4000

☒ Calendar Period

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.

AN Setup EXO Business Analytics Month

File Navigate Setup Help

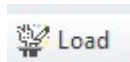
New Edit Save Cancel Delete Load

Financial Periods for Year : CURRENT

Sales Year: CURRENT

Period Name	Year	End Date
2013-2014		
2014-2015		
JULY	2015-2016	2020 Fri, Jul 31, 2020
AUGUST	2016-2017	2020 Mon, Aug 31, 2020
SEPTEMBER	2017-2018	2020 Wed, Sep 30, 2020
OCTOBER	2018-2019	2020 Sat, Oct 31, 2020
NOVEMBER	2019-2020	2020 Mon, Nov 30, 2020
DECEMBER	2020	2020 Thu, Dec 31, 2020

9. Now click **New** and create each of the 12 months that belong to the new year.



AN Setup EXO Business Analytics Month

File Navigate Setup Help

New Edit Save Cancel Delete Load

Financial Periods for Year : CURRENT

Sales Year : CURRENT

Period Name	Start Date	End Date
JULY	Wed, Jul 1, 2020	Fri, Jul 31, 2020
AUGUST	Sat, Aug 1, 2020	Mon, Aug 31, 2020
SEPTEMBER	Tue, Sep 1, 2020	Wed, Sep 30, 2020
OCTOBER	Thu, Oct 1, 2020	Sat, Oct 31, 2020
NOVEMBER	Sun, Nov 1, 2020	Mon, Nov 30, 2020
DECEMBER	Tue, Dec 1, 2020	Thu, Dec 31, 2020
JANUARY	Fri, Jan 1, 2021	Sun, Jan 31, 2021
FEBRUARY	Mon, Feb 1, 2021	Sun, Feb 28, 2021
MARCH	Mon, Mar 1, 2021	Wed, Mar 31, 2021
APRIL	Thu, Apr 1, 2021	Fri, Apr 30, 2021
MAY	Sat, May 1, 2021	Mon, May 31, 2021
JUNE	Tue, Jun 1, 2021	Wed, Jun 30, 2021

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**.

AN Setup EXO Business Analytics Budget

File Navigate Tools Help

Edit Save Cancel Reset to Zero

Budgets for Year : CURRENT

Period Year : CURRENT Branch : <All Branches>

Period Name	Value	Margin %
JUNE	0.00	1.00
MAY	0.00	1.00
APRIL	0.00	1.00
MARCH	0.00	1.00
FEBRUARY	0.00	1.00
JANUARY	0.00	1.00
DECEMBER	0.00	1.00
NOVEMBER	0.00	1.00
OCTOBER	0.00	1.00
SEPTEMBER	0.00	1.00
AUGUST	0.00	1.00
JULY	0.00	1.00
<b>Total:</b>	<b>0.00</b>	

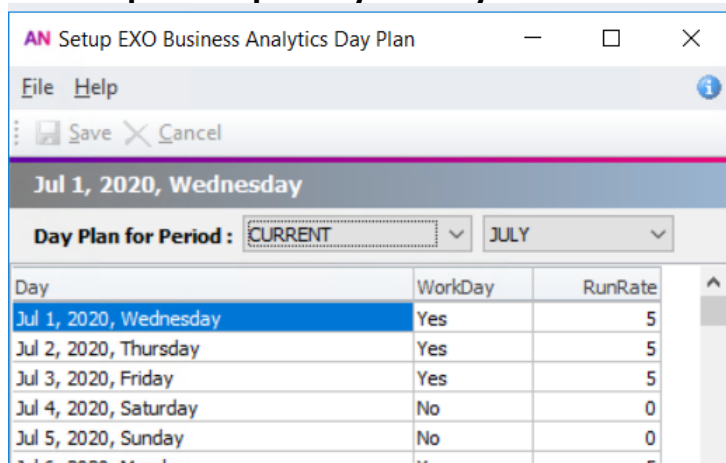
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### Analytics & CRM setting up the new financial year

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**.



Day	WorkDay	RunRate
Jul 1, 2020, Wednesday	Yes	5
Jul 2, 2020, Thursday	Yes	5
Jul 3, 2020, Friday	Yes	5
Jul 4, 2020, Saturday	No	0
Jul 5, 2020, Sunday	No	0

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.

If you need assistance please contact the Support Team at Stratus email:  
[supportwa@stratusgroup.com.au](mailto:supportwa@stratusgroup.com.au) or tel: 1300 499 000