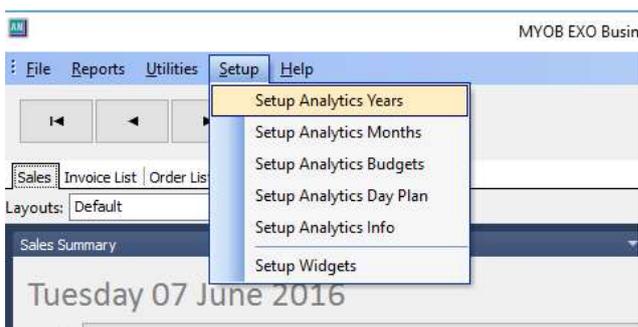


Overview

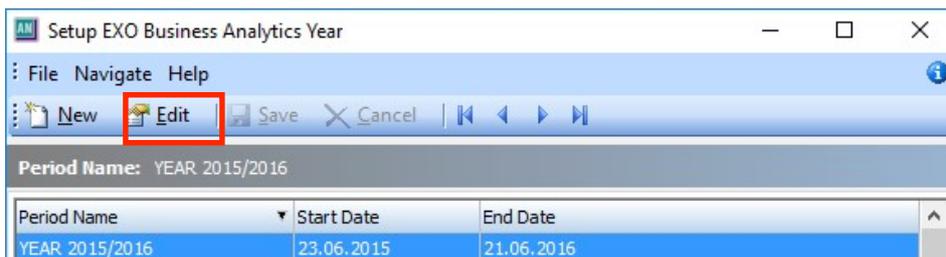
At the start of each new financial year, you will need to define the Year and the Periods in Analytics.

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

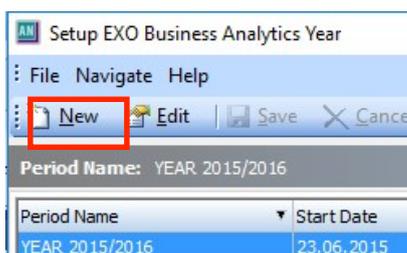
1. Open the Analytics Report. A message may appear stating that it cannot define the periods, click **yes**.
2. Once the Report loads, click **Setup > Setup Years**



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.

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

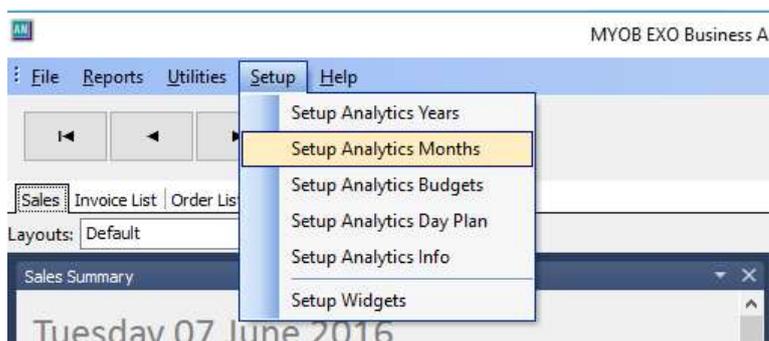
Valid Range for Start of Financial Year
Wed, Jul 1, 2020 <= Start Year <= Wed, Jul 1, 2020

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

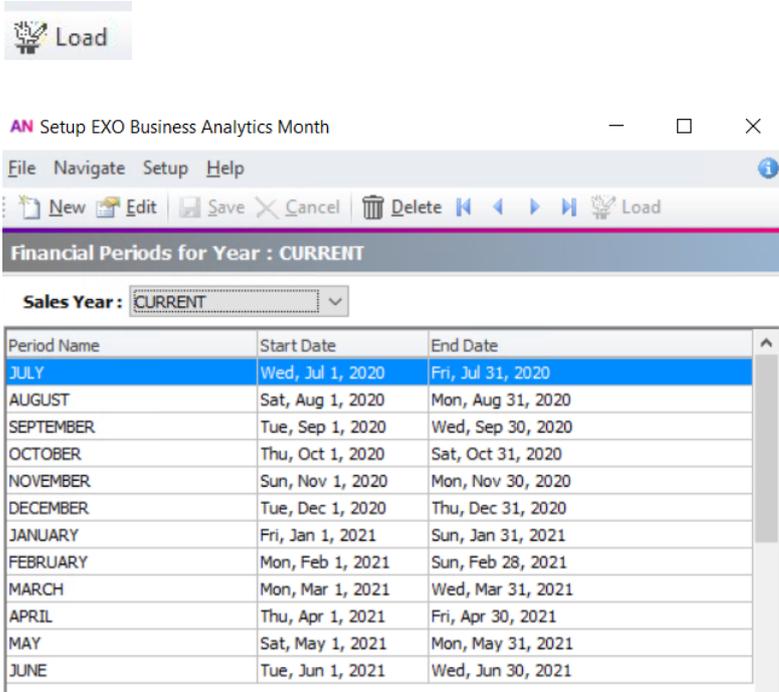
New Edit Save Cancel Delete Load

Financial Periods for Year : CURRENT

Sales Year: CURRENT

Period Name	Start Date	End Date
2013-2014		
2014-2015		
JULY	2020	Fri, Jul 31, 2020
AUGUST	2020	Mon, Aug 31, 2020
SEPTEMBER	2020	Wed, Sep 30, 2020
OCTOBER	2020	Sat, Oct 31, 2020
NOVEMBER	SUN, Nov 1, 2020	Mon, Nov 30, 2020
DECEMBER	Tue, Dec 1, 2020	Thu, Dec 31, 2020

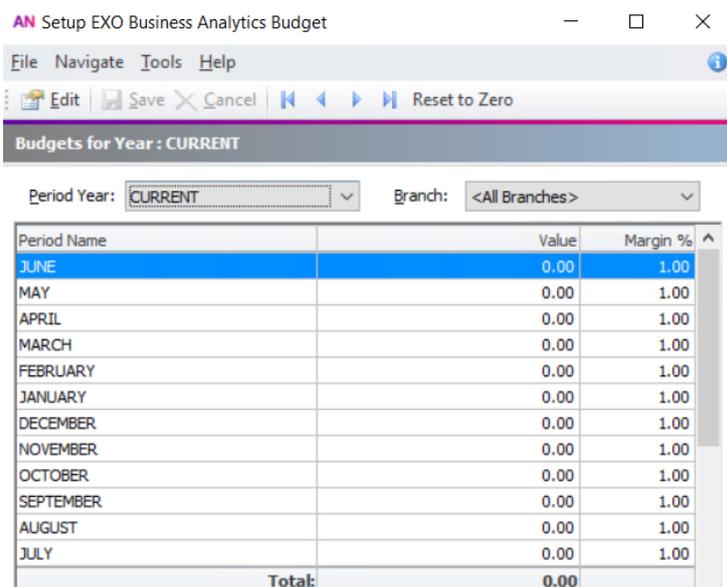
9. Now click **New** and create each of the 12 months that belong to the new year.



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**.



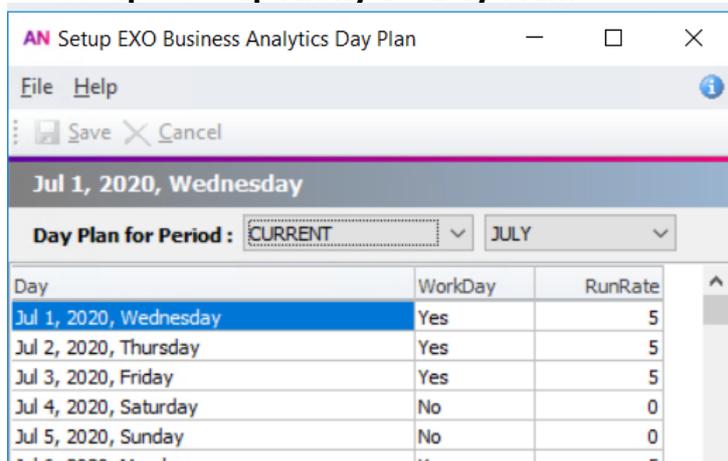
stratus consulting group

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**.



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 or tel: 1300 499 000