

Job and Category Analytics for MYOB

Heavy-duty divisional reporting... made simple.

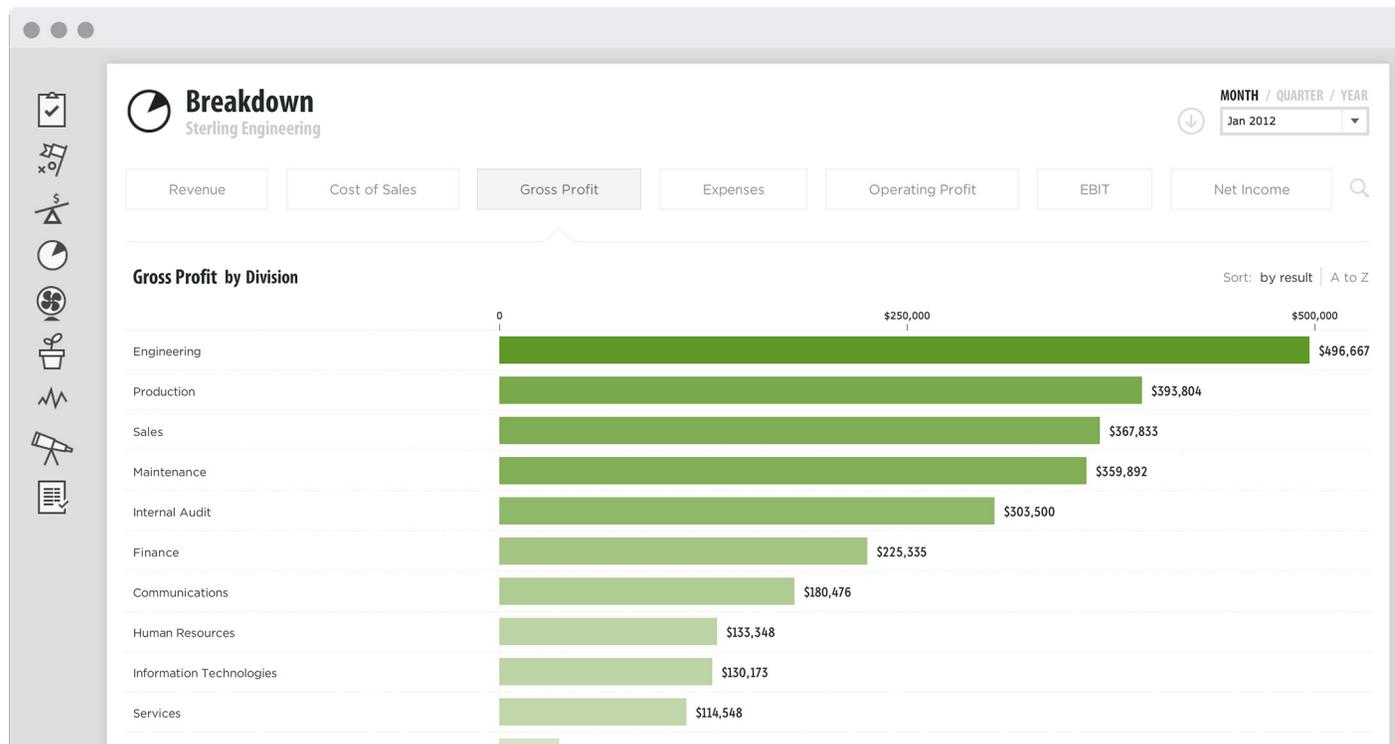


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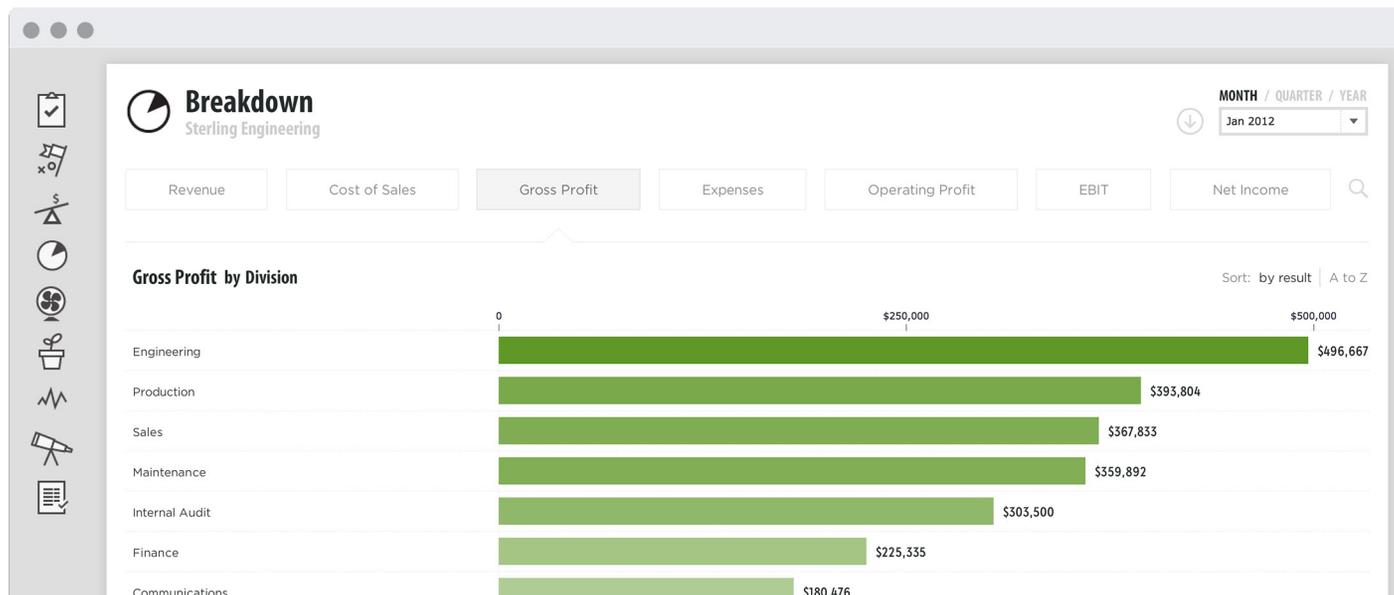
INTRODUCTION

New features

We're excited to announce that job and category analysis is now available in Fathom!

These new features help you to dig deeper into the performance of different areas of your business. This latest release offers everything you need to gain insights into the performance of your jobs, categories, locations, cost centres, profit centres...

Or any other job or category data sourced from MYOB.





GETTING STARTED

Importing from MYOB

When importing from MYOB into Fathom, you can now choose to also import data for selected jobs or categories. First enter your MYOB AccountRight Live username and password, select the period range for import, and click **'Import'**.

The screenshot shows a web browser window with a dark grey background. In the center, a white dialog box titled "SELECT A COMPANY" is open. At the top of the dialog box is the AccountRight Live logo. Below the logo is a dropdown menu showing "Demo Company (AU)". Underneath are three input fields: "Username:" with the text "Administrator", "Password:" with masked characters "....", and an "IMPORT" button. To the right of the "IMPORT" button is the text "or cancel". A mouse cursor is pointing at the "IMPORT" button. The background of the browser window shows a sidebar with "MYOB Cloud" and "MYOB Desktop" sections, and a main content area with "AccountRight Live" branding and a "Frequently Asked Question" section.

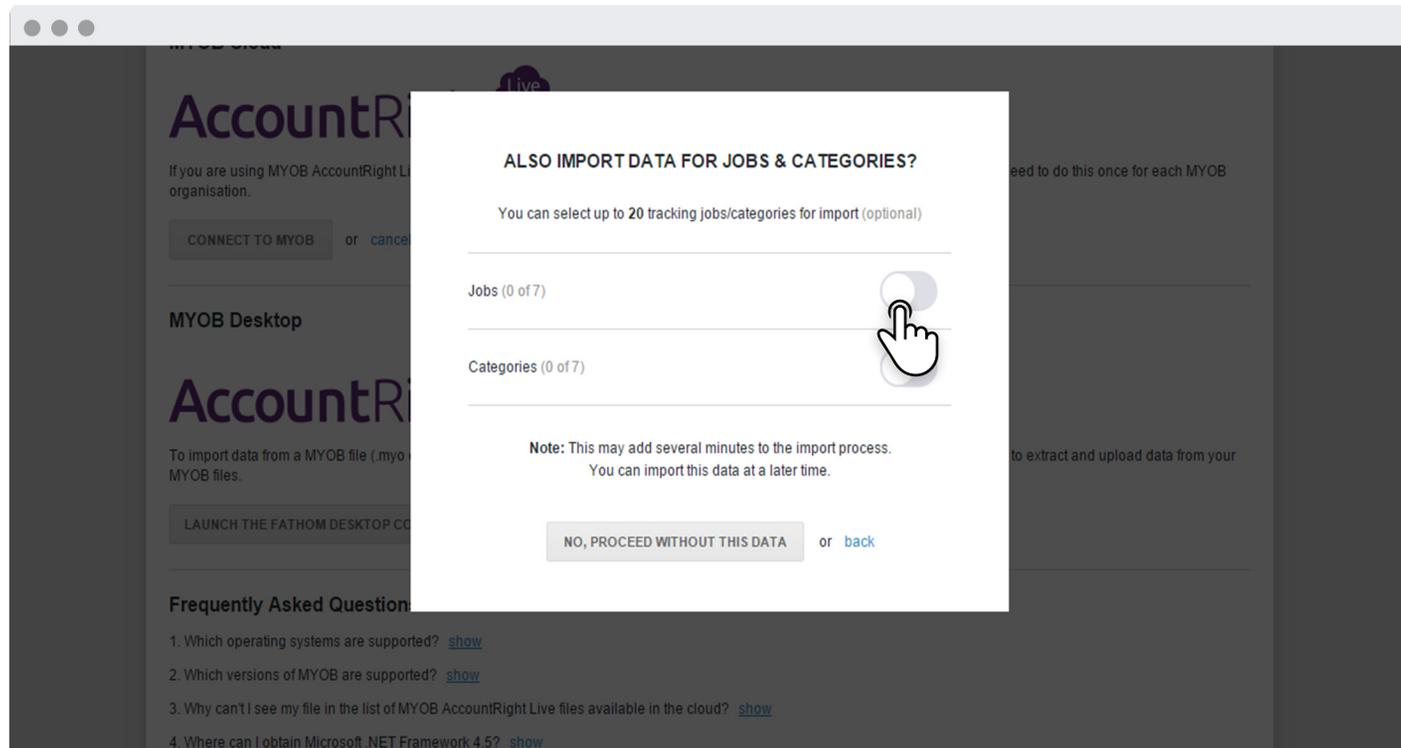


GETTING STARTED

Selecting job and category data

Then choose which jobs or categories you wish to import for analysis.

Jobs and categories are typically setup in MYOB to help to track different segments within a business (ie. divisions, departments, business units, cost centres etc..)





IMPORTING

Selecting job options

Then select which job and category options you wish to include in your analysis and reports. You can import a **maximum of 20** job options per company.

Simply select the 'green' tick (✓) to include the option in the import.

SELECT DEPARTMENTS FOR IMPORT (MAX 20)

[select all](#) [unselect all](#)

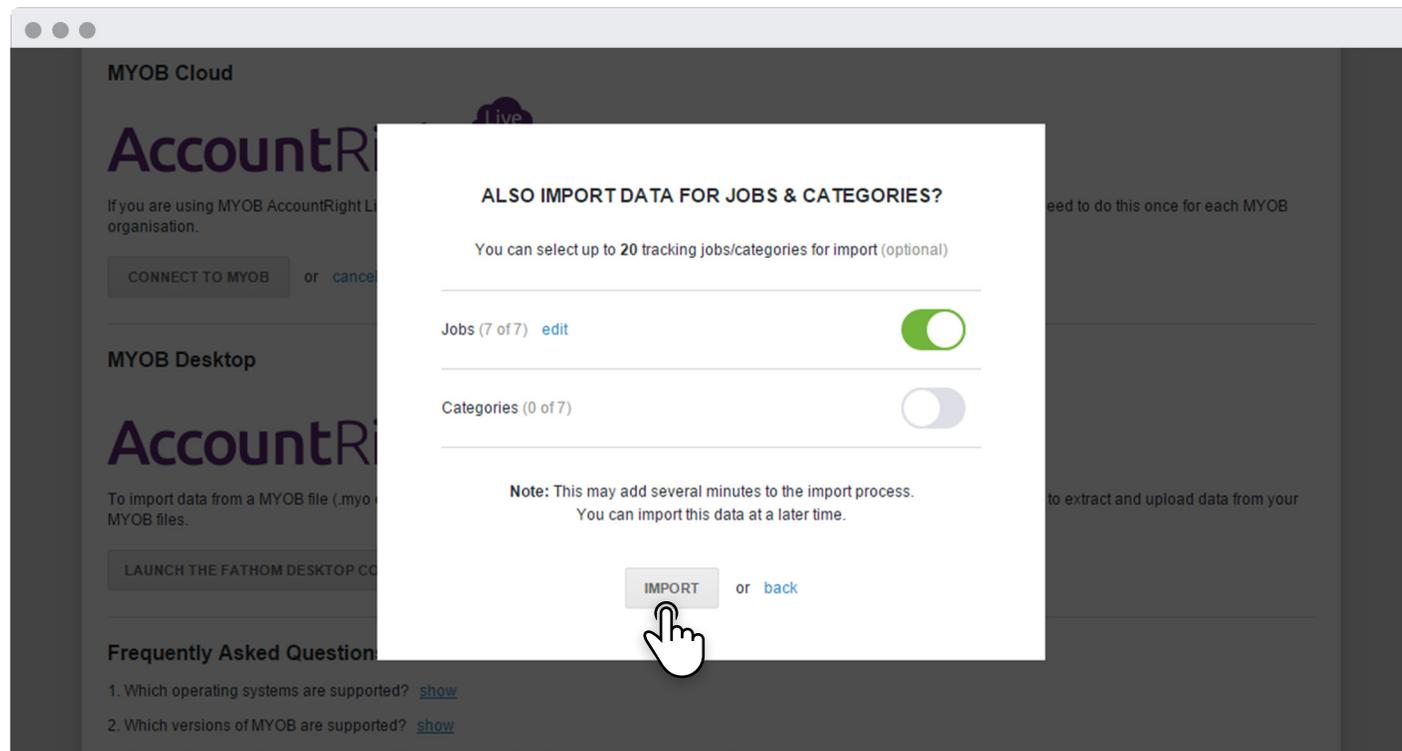
<input checked="" type="checkbox"/>	Sales
<input checked="" type="checkbox"/>	Production
<input checked="" type="checkbox"/>	Marketing
<input checked="" type="checkbox"/>	Research and Development
<input type="checkbox"/>	



IMPORTING

Confirm selection

Click on '**Confirm selection**' to start the import process. The import of data for each job or category option may take up to 1 minute - depending on the number of monthly periods to be imported.



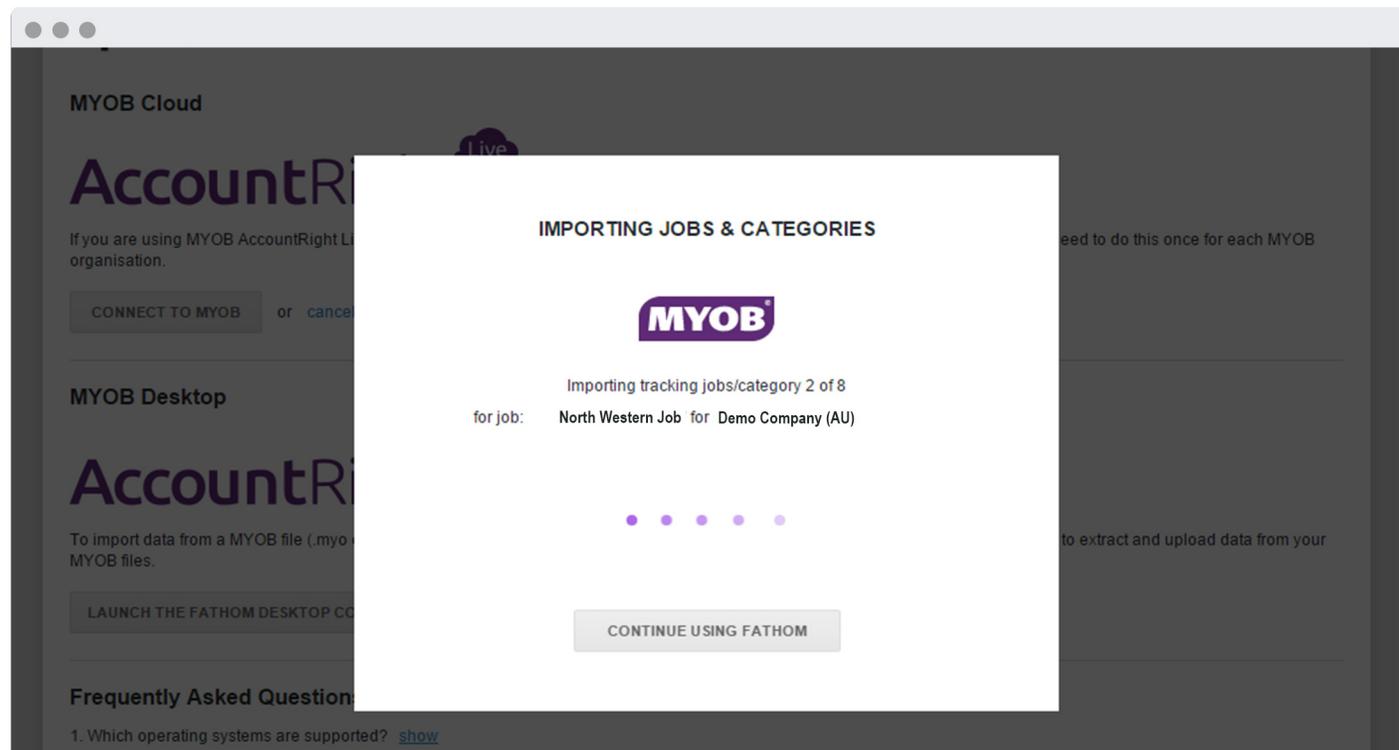


IMPORTING

Importing

While the import is occurring, you can continue using Fathom. Click '**Continue using Fathom**' to proceed. A notification will appear to let you know when the import is complete.

After the import is complete, you may access the setup, analysis and reports for this company.





IMPORTING

Updating results

To update the financial results for a company and associated results for each job option, go to **'Step 1'** of the company setup and select **update from MYOB**.

Update Source Data
Demo Company (AU)

1 Update Data 2 Company Profile 3 Tag Financials 4 Select KPIs 5 Set Targets 6 Set Alerts View Analysis

Step 1: Import or update your financial and non-financial data.

Financials

Date Range: October 2010 - November 2015 [remove periods](#)

Source: **MYOB**

Tracking: Jobs (7 imported) [edit](#)

Last Updated: 1 minute ago (27th November 2015 5:44pm)

UPDATE FROM MYOB

Budgets



IMPORTING

Importing job and category data for an existing company

If you have previously imported a company from MYOB into Fathom, it's possible to subsequently import data for jobs. To do this go to **'Step 1'** of the company setup > then in the **'Jobs'** section click on **'Edit'** to select which jobs or categories you wish to include in your analysis.

Update Source Data
Demo Company (AU)

1 Update Data 2 Company Profile 3 Tag Financials 4 Select KPIs 5 Set Targets 6 Set Alerts View Analysis

Step 1: Import or update your financial and non-financial data.

Financials

Date Range: October 2010 - November 2015 [remove periods](#)

Source: **MYOB**

Tracking: Jobs (7 imported) [edit](#)

Last Updated: 1 minute ago (27th November 2015 5:44pm)

UPDATE FROM MYOB



CREATING CUSTOM KPIS

Creating a Custom KPI

You can easily create custom KPIs to track the performance of your divisions, departments or regions. Go to **'Step 4'** of the company setup, then select **'Create a KPI'**.

CREATE A KPI FOR A DIVISION

Step 4: Select from a range of standard financial KPIs or create your own KPI.

You have selected (✓) 25 KPIs. Show all KPIs Show selected KPIs [CREATE A KPI](#)

		Type	Importance	
A Profitability				
✓ Total Revenue ?	Default	★★★★	Critical	
✓ Gross Profit Margin (%) ?	Default	★★★☆☆	Medium	
✓ Operating Profit Margin (%) ?	Default	★★★★☆	High	
✓ Expense-to-Revenue Ratio ?	Default	★★★★	Critical	
✓ Breakeven Margin of Safety ?	Default	★☆☆☆☆	Low	
B Activity				
✓ Activity Ratio ?	Default	★★★★	Critical	
✓ Accounts Receivable Days ?	Default	★☆☆☆☆	Low	



CREATING CUSTOM KPIS

Creating a KPI for a division

Using the KPI formula builder, you can create your own custom KPIs, For example:

Gross Profit % of Division A =



$$\left(\frac{\text{Gross Profit}_{\text{Division A}}}{\text{Total Revenue}_{\text{Division A}}} \right) \times 100$$

[Clear](#)

Select a variable to include in the formula:

Use current period

Use prior period

All

Profit & Loss

Balance Sheet

Non-Financials

Other

A

Abnormal Income (\$)

Adjustments (\$) *

Adjustments (\$)

C

Cash Tax Paid (\$)

COS Goods (\$) *

D

Depreciation (\$)

Agents Commissions (\$) *

Amortisation (\$) *

COS Other (\$) *

Cost of Sales (\$)

Depreciation & Amortisation (\$) *



CREATING CUSTOM KPIS

Creating a KPI for multiple divisions

You can also create a custom KPI which tracks the performance of multiple jobs, departments, locations, etc... For example:

Revenue from Division A + Division B, as a % of Total Revenue



$$\left(\left(\text{Revenue}_{\text{Division A}} + \text{Revenue}_{\text{Division B}} \right) / \text{Total Revenue} \right) \times 100$$

[Clear](#)

Select a variable to include in the formula:

Use current period

Use prior period

All

Profit & Loss

Balance Sheet

Non-Financials

Other

A

Abnormal Income (\$)

Adjustments (\$) *

Adjustments (\$)

C

Cash Tax Paid (\$)

COS Goods (\$) *

D

Depreciation (\$)

Agents Commissions (\$) *

Amortisation (\$) *

COS Other (\$) *

Cost of Sales (\$)

Depreciation & Amortisation (\$) *

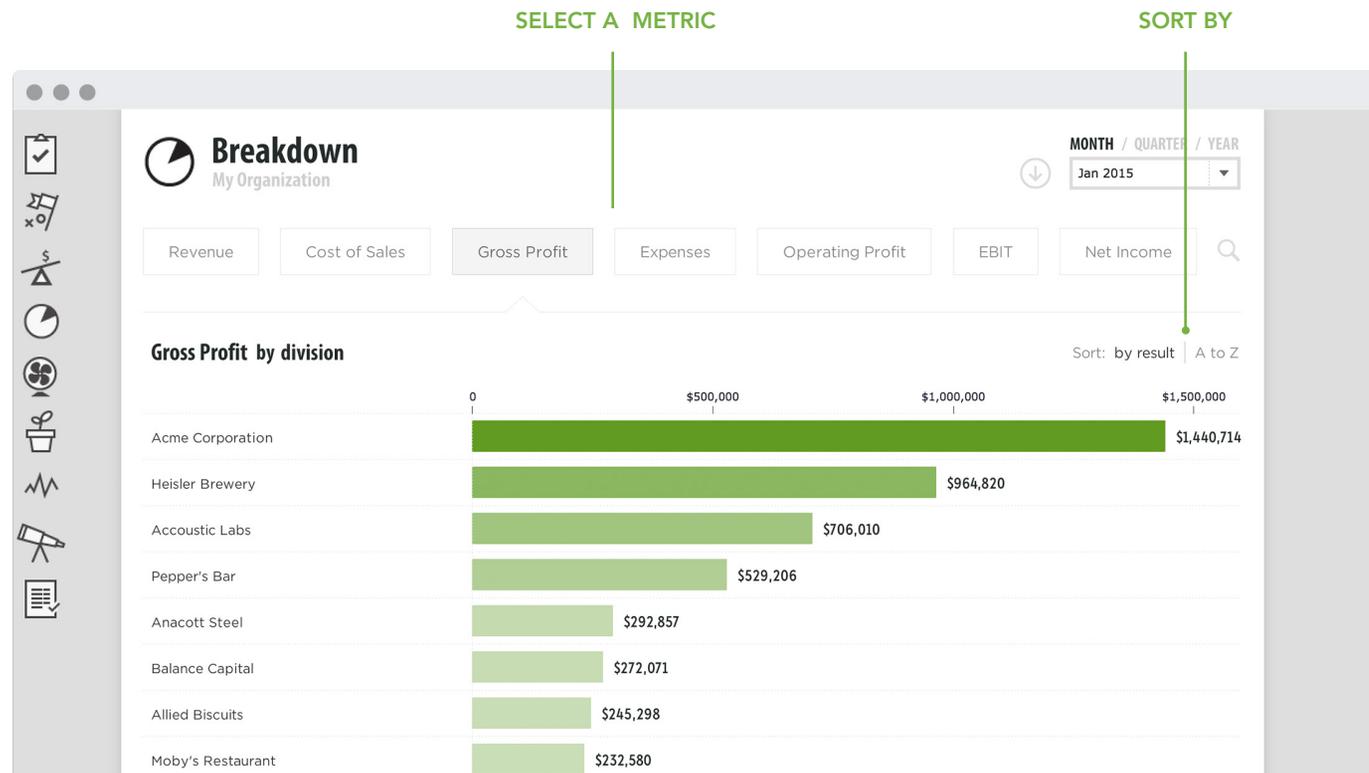


ANALYSIS

Breakdown analysis

The breakdown analysis tool makes it easy to view profitability breakdowns.

It helps to rank the **profitability** of each business unit. Using the menu at the top of the analysis tool, you can quickly select from a range of profitability margins. And then sort results, from best performer to worst performer, or sort by alphabetical order.



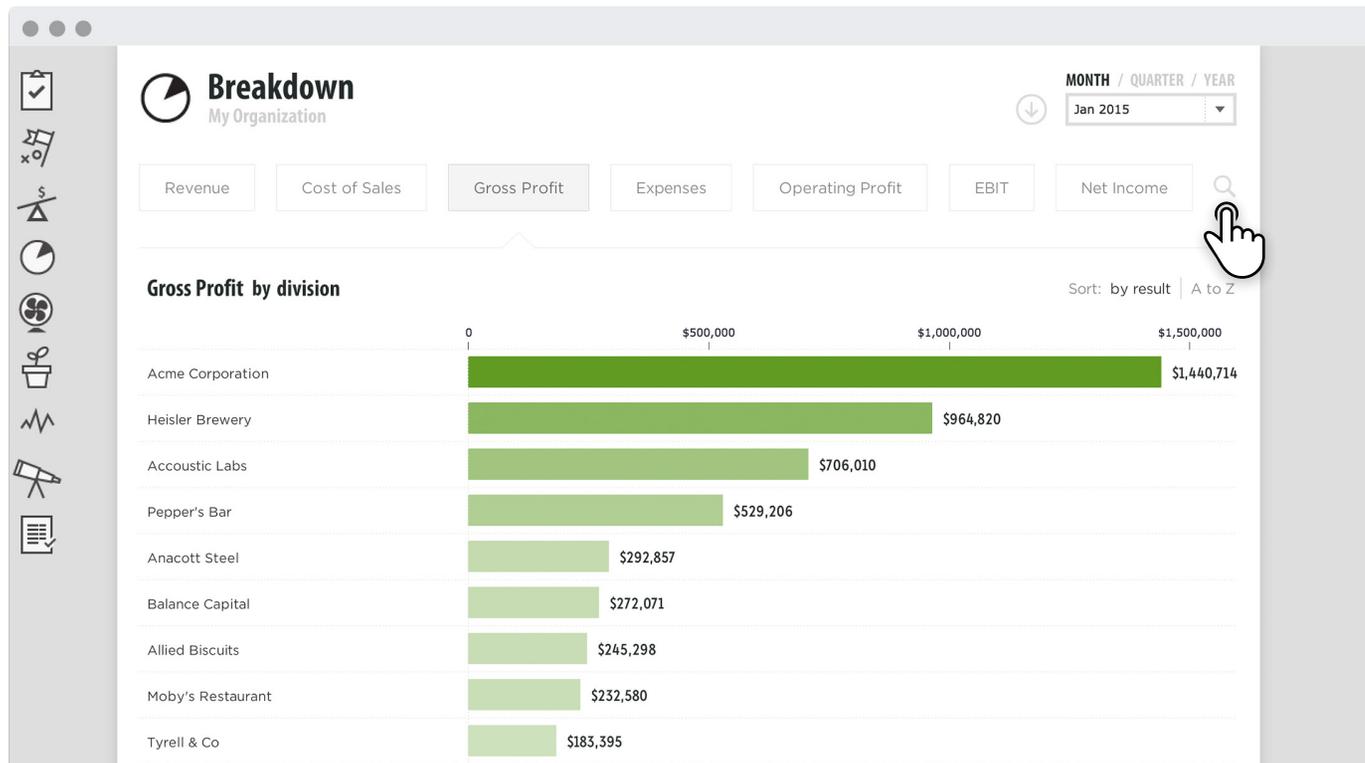


ANALYSIS

Breakdown analysis for any metric

In addition to the profitability metrics, you can view a breakdown analysis for any other metric. To do this select the magnifying glass (🔍)

Note: any amounts not classified to a job or category option, are shown as 'unclassified'.

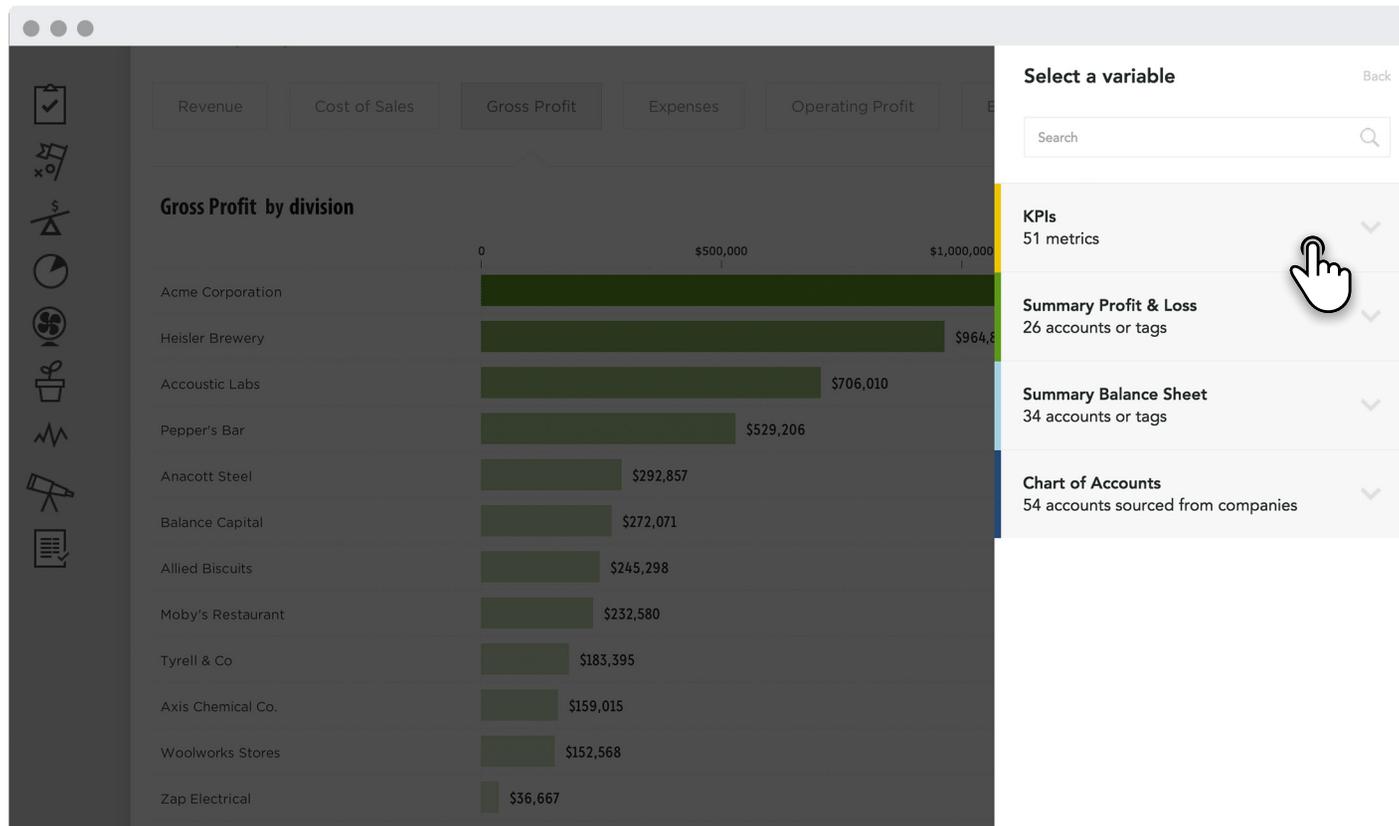




BREAKDOWN ANALYSIS

Select a metric

Then from the side panel, select any specific revenue account, expense account, financial KPI or custom KPI. You can also search for a metric or account.

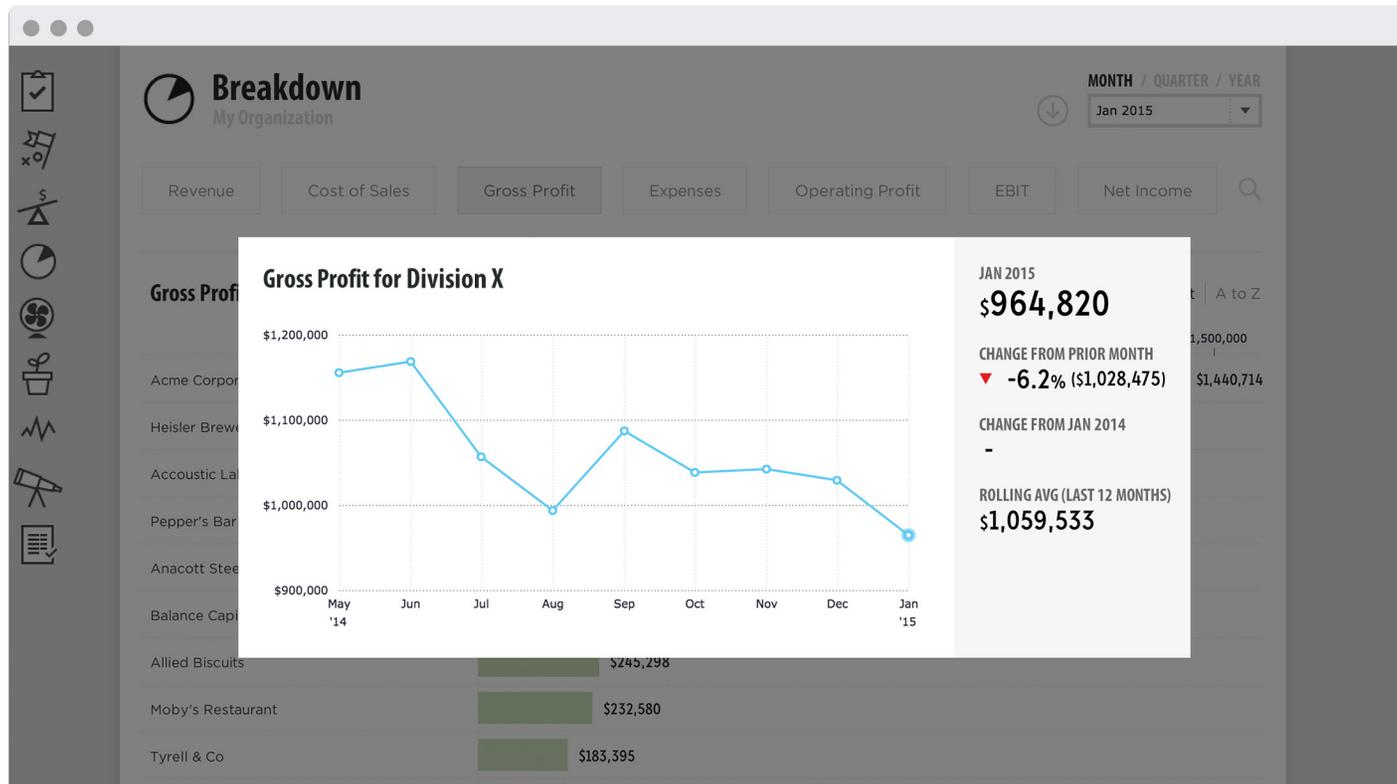




BREAKDOWN ANALYSIS

Breakdown drilldown

To see additional details about the results for a specific job or category option, click on a row in the breakdown analysis to view more details and a trend of results.





REPORTING

Breakdown report

Click on the download a report icon (⬇️) to create a PDF report of the current view.

Breakdown Analysis

EBIT by company





REPORTING

Excel reports

You can also create Excel reports which show **side-by-side financial statements** for each division, department, location or business unit. To do this go to 'Reports'.

CHARTS OF ACCOUNTS

DIVISIONS

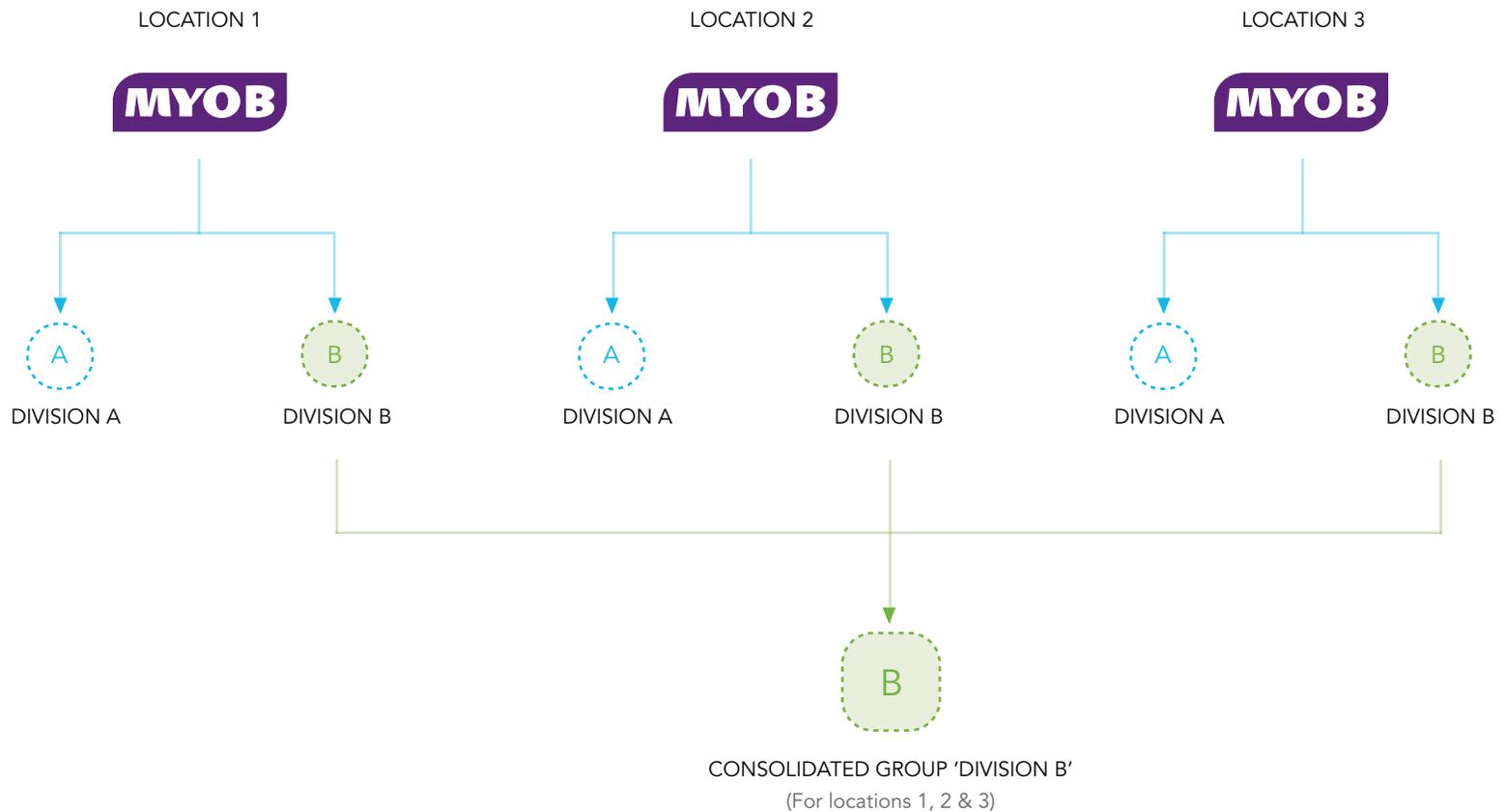
	A	B	C	D	E	F
	Account Name	Account Code	East	North	South	Unclassified
1	ACME Co. - Financials by Regions					
2	Oct 2015					
3						
4						
5						
6	Income					
7	Sales	200	2,800.00	8,950.00	500.00	8,075.00
8	Total Income		2,800.00	8,950.00	500.00	8,075.00
9						
10	Cost of Sales					
11	Purchases	300				763.64
12	Cost of Goods Sold	310				
13	Total Cost of Sales		0.00	0.00	0.00	763.64
14	Gross Profit		2,800.00	8,950.00	500.00	7,311.36
15						
16	Expenses					
17	Advertising	400	700	670	300	602.73
18	Bank Fees	404	0	245	150	(384.50)
19	Cleaning	408	157	110	0	43.00
20	Consulting & Accounting	412	0	0	0	98.00
21	Depreciation	416	0	243	0	(243.00)
22	Entertainment	420	345	112	50	(707.00)
23	Freight & Courier	425	0	90	0	(90.00)
24	General Expenses	429	76.6	1300	0	(1,258.42)
25	Insurance	433	0	0	0	
26	Legal expenses	441	0	0	0	



CONSOLIDATING DIVISIONS

Overview

Fathom enables you to consolidate jobs and categories from separate MYOB organisations. For example, if a business operates in 3 locations and each location is comprised of 2 divisions.



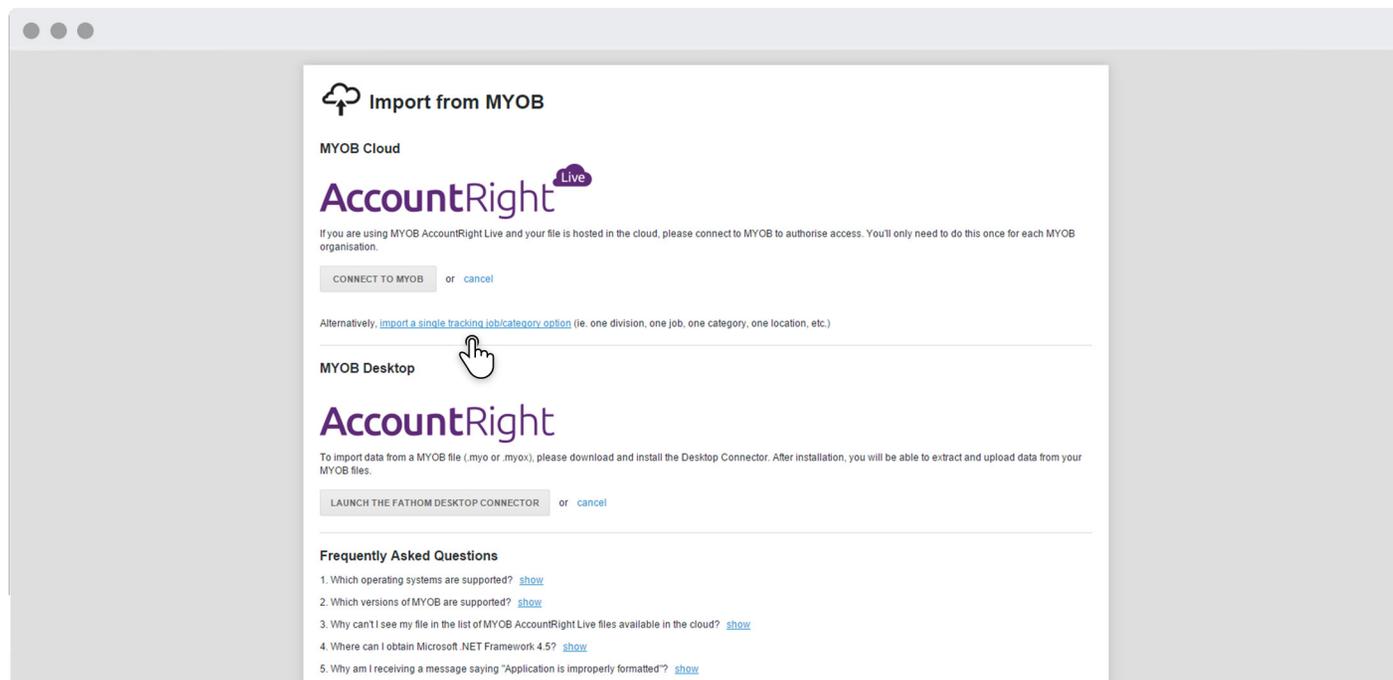


CONSOLIDATING DIVISIONS

Consolidating Divisions

To consolidate or compare different divisions, first import a single job or category option as a separate entity in Fathom.

Go to **'Add a company / group'**, select **'MYOB'** as your source, then select to **'import a single tracking job option'**. Rather than importing a company and all selected divisions, only data for the selected jobs will be imported.





CONSOLIDATING DIVISIONS

Importing a division as a separate entity

You can only import a single job option for any company which you have previously imported into Fathom. Select the company > then **select one job** from that company. Click **“Import”** to commence the import of data for this job.

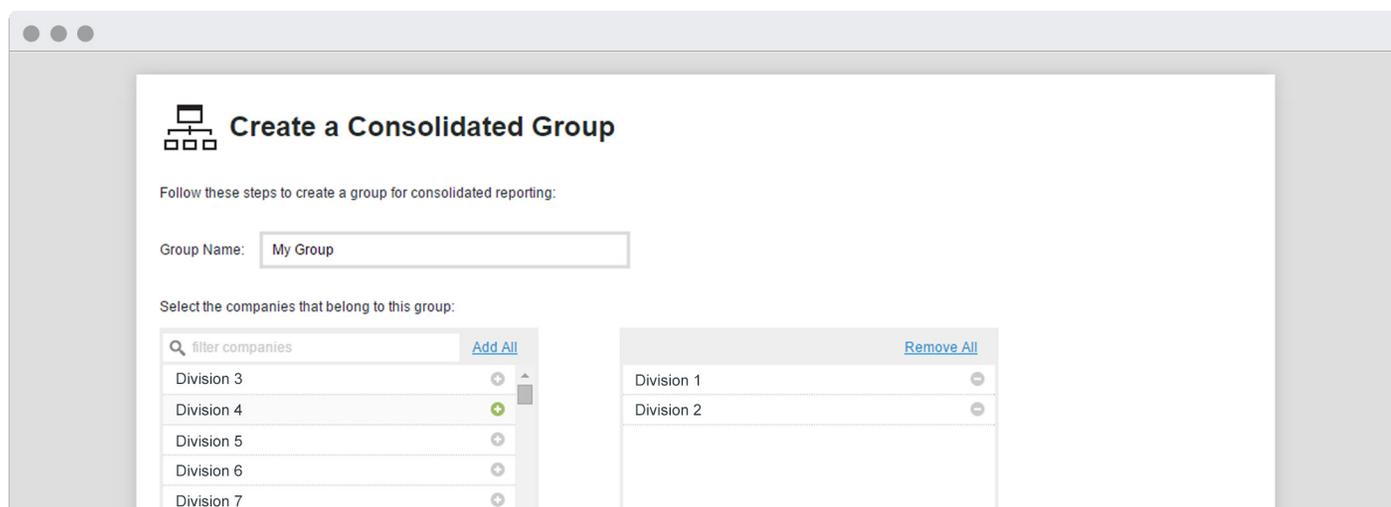
The screenshot shows the AccountRight Live web interface. A modal dialog box is open in the center, titled "SELECT A JOB OR CATEGORY". The dialog features the AccountRight Live logo at the top. Below the logo, it prompts the user to "Select one Job or Category to import:" with a dropdown menu currently showing "Sales Job". Underneath, it asks to "Enter a name for this entity" with a text input field containing "Demo Company (AU) Sales". At the bottom of the dialog, there are two buttons: "IMPORT" and "cancel". A mouse cursor is pointing at the "IMPORT" button. The background of the interface is dimmed, showing sections for "MYOB Cloud" and "MYOB Desktop" with various instructions and links.



CONSOLIDATING DIVISIONS

Creating a consolidated group

After importing each division as a separate entity, you can group divisions into a consolidated group. To do this go to **'Add a company / group'**, then select **'Group'**.



or creating a benchmark group

Or after importing each division as a separate entity, you can also group divisions into a benchmark group. To do this, from the top menu go to **'Benchmark Settings'**, then select **'Create a new group'**.

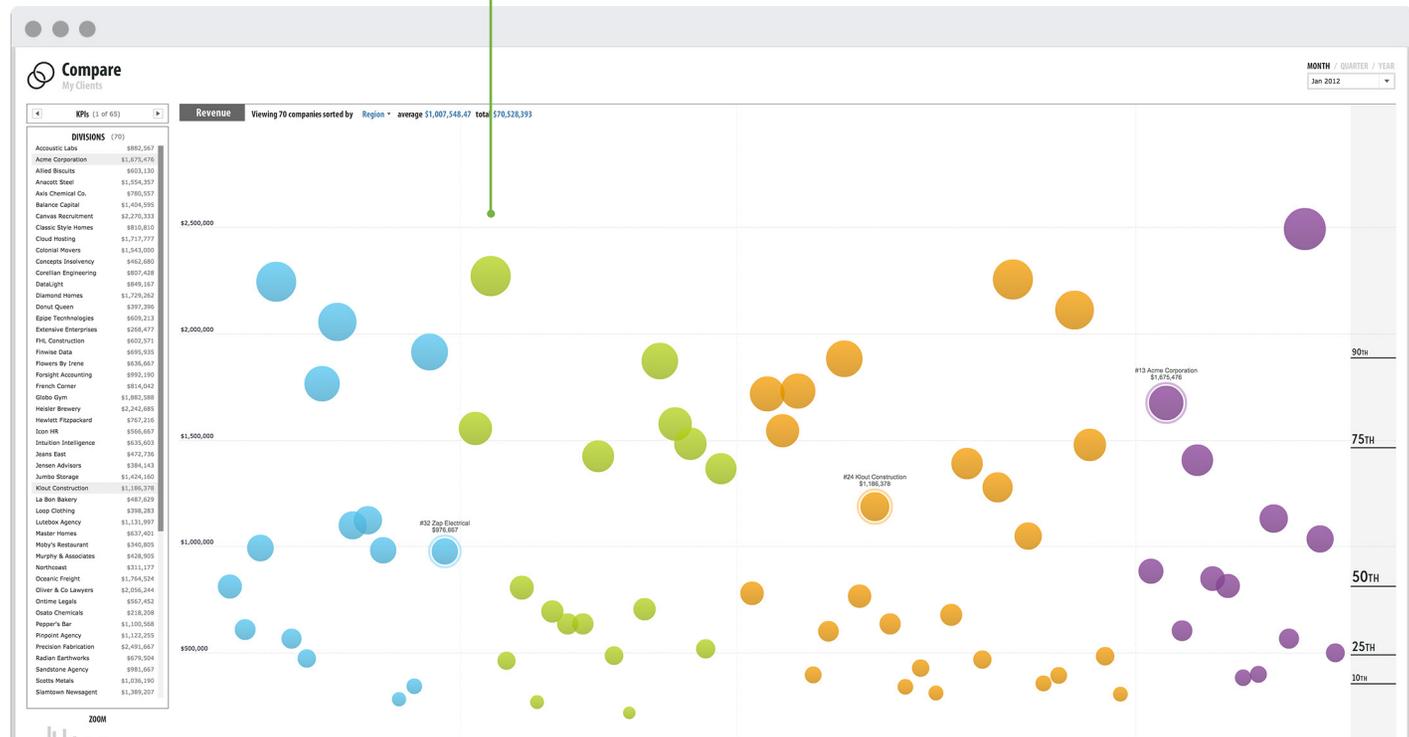


COMPARING DIVISIONS

Benchmarking divisions

Using the **Compare** tools in Fathom you can compare and rank the performance of your divisions.

EACH DOT REPRESENTS A DIVISION





APPENDIX

Terms

JOBS

Jobs in MYOB help to review and compare different areas of your organisation, and improve your reporting. For example if you have a car hire business operating from 7 locations and also have two business divisions, Corporate and Retail. Jobs help to track sales at each location, department, and also sales in each division

JOB OPTIONS

These are the job or category options you want to track. For example, the regions in which your business operates (ie. north region, south region, east region and west region).

BREAKDOWN ANALYSIS

The breakdown analysis tool makes it easy to visually compare the performance of different areas of your organisation. It also enables consolidated groups to compare the performance of companies which form part of that group.

FATHOM

www.fathomhq.com