Job and Category Analytics for MYOB

Heavy-duty divisional reporting... made simple.
# Table of Contents

## INTRODUCTION
03 New features

## GETTING STARTED
04 Importing from MYOB
05 Selecting tracking categories
06 Selecting job options
07 Confirm selection
08 Importing
09 Updating results
10 Importing job and category data for an existing company

## TRACKING KPIs
11 Creating Custom KPIs
12 Creating KPIs for a division
13 KPIs for multiple divisions

## ANALYSIS
14 Breakdown analysis
15 Breakdown analysis for any metric
16 Selecting a metric
17 Breakeven drilldown

## REPORTING
18 Breakdown reports
19 Excel reports

## CONSOLIDATING DIVISIONS
20 Overview
21 Consolidating divisions
22 Importing a division as a separate entity

## COMPARING DIVISIONS
23 Creating a benchmarking group
24 Benchmarking your divisions

## APPENDIX
25 Terms
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.
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’.
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..)
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.
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

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.
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.
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.
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’.
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 =**

\[
\left( \frac{\text{Gross Profit} \text{ Division A}}{\text{Total Revenue} \text{ Division A}} \right) \times 100
\]
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**

\[
\left( \frac{\text{Revenue} \_{\text{Division A}} + \text{Revenue} \_{\text{Division B}}}{\text{Total Revenue}} \right) \times 100
\]
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.
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 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.
Breakdown report

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

Breakdown Analysis

EBIT by company

<table>
<thead>
<tr>
<th>Company</th>
<th>EBIT Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acoustic Labs</td>
<td>$-500,000 - $653,587</td>
</tr>
<tr>
<td>Balance Capital</td>
<td>$0 - $481,557</td>
</tr>
<tr>
<td>Pepper's Bar</td>
<td>$340,870</td>
</tr>
<tr>
<td>Acme Corporation</td>
<td>$334,286</td>
</tr>
<tr>
<td>Axis Chemical Co.</td>
<td>$101,315</td>
</tr>
<tr>
<td>Heisler Brewery</td>
<td>-$18,275</td>
</tr>
<tr>
<td>Anacott Steel</td>
<td>-$147,571</td>
</tr>
<tr>
<td>Moby's Restaurant</td>
<td>-$154,587</td>
</tr>
<tr>
<td>Zap Electrical</td>
<td>-$288,833</td>
</tr>
</tbody>
</table>
**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’.
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.
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.
CONSORTIATING 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.
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
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 is also enables consolidated groups to compare the performance of companies which form part of that group.