

OCTOBER 2023

MYOB EXO WIDGETS SALES ANALYSIS DESIGNER & MANAGEMENT REPORT



DIANNE SEMMENS

Managing Director
MYOB Exo & Advanced



TONYA SEY

Senior Consultant
MYOB Exo & Advanced



WATERCOOLER
for clients

Acacia
Business Software Solutions
presents

Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements.
If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

AGENDA:

1. WHAT IS THE MANAGEMENT REPORT?
2. WHAT IS THE SALES ANALYSIS DESIGNER?
3. WHAT ARE WIDGETS?
4. RUN THROUGH EXAMPLES OF SALES ANALYSIS DESIGNER
5. RUN THROUGH EXAMPLES OF WIDGETS
6. CONTROL ACCESS RIGHTS TO SALES ANALYSIS DESIGNER REPORTS & WIDGETS

Acacia
Business Software Solutions
presents



Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

MANAGEMENT REPORT

- The Management Report is a utility that's been a part of Exo since ... before I can remember. It is now part of the Analytics module.
- It provides a quick summary of the state of sales compared to budget (if loaded).
- Each financial year (date range) must be configured in the Management Report setup.
- The report must be opened so a record (snapshot) can be made for that day.
- The utility can be scheduled to automatically take a snapshot of the sales for the day.

Acacia
Business Software Solutions
presents



Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

MANAGEMENT REPORT

Sales Summary

Thursday 28 September 2023

Branch: <All Branches>

Sales Period:	\$8,025
Sales GP Period:	19.45%
Budget Period:	\$15,000
Budget GP Period:	30.00%
Days So Far:	6
Days this Period:	22

Period:	SEPTEMBER
Sales Today:	\$288
Sales GP Today:	26.39%
Orders Today (\$):	\$0
Orders Today Qty:	0
Sales YTD:	\$174,849
Sales YTD GP:	28.48%

Run Rate Actual:	\$1,532
Run Rate Required:	\$416
Estimated Period End:	\$33,705

Period Sales:	54 %
Period Work Days:	27 %

Acacia
Business Software Solutions
presents



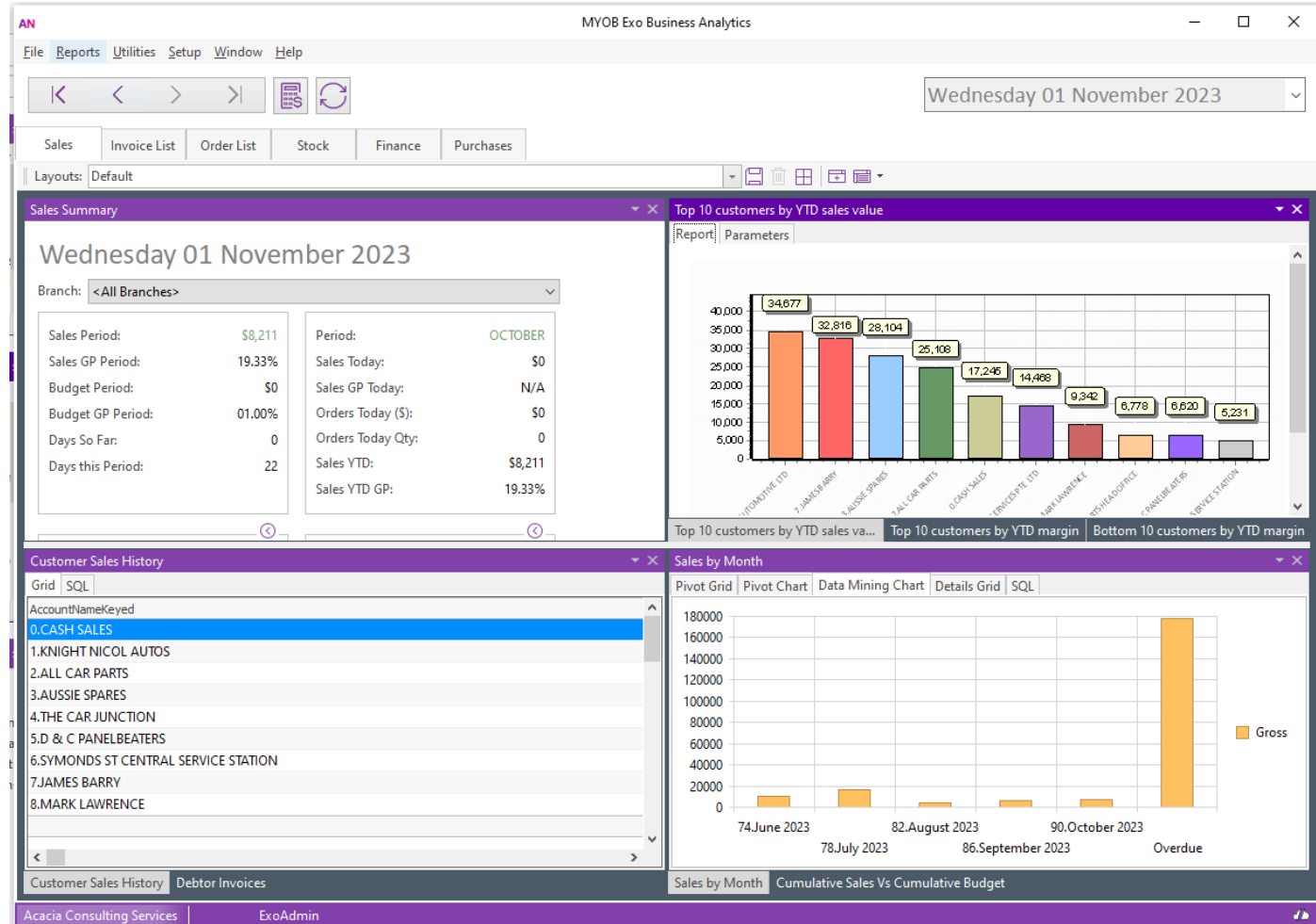
Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

WIDGETS

- Widgets are on-screen reporting tools that can be run on demand or embedded into a user's business flow menu.
- Widgets are available in nearly all Exo modules (e.g. Exo Business, Job Costing, Point of Sale, Analytics).
- Widgets allow quick access to required data which may be in the form of a data grid, Clarity report and/or graphs. Widgets can also be used to load websites (e.g. a bank's foreign exchange rate information).



WIDGETS



Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

SALES ANALYSIS DESIGNER

- The Sales Analysis Designer is a standard utility available in Exo Business that gives the user flexibility to “design” sales analysis reports to meet various sales reporting requirements.
- Use of the Sales Analysis Designer is done within the confines of the utility. For example, reports can only have two group levels; and report types are pre-defined.
- Customisation of the Sales Analysis Designer reports and extracted data is possible.

Acacia
Business Software Solutions
presents



WATERCOOLER
for clients

SALES ANALYSIS DESIGNER



EB Sales Analysis

File Excel Help

Export to Excel

Report Type

Period: 0. October 2023

Groupings

Main Group: AccountNumberKeyed

Secondary Group: No Groupings

Report Heading: AccountNumberKeyed Report

Other Options

Show Cost and Profit Show Cents Sort by Sales

Show Sales Only Add Subtotal Below Rpt Sort By Quantity

Show Quantity Only

Selection Criteria

Edit Delete

Field: AccountNumberKeyed Condition: = Value:

Add Criteria

Acacia Consulting Services

Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

Q&A

OVER TO YOU



WATERCOOLER *for clients*

Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.

THANK YOU FOR JOINING US

- NEXT EXO WATER COOLER: FEBRUARY 2024
- MYOB ADVANCED WEBINAR IN NOVEMBER
- SEND THROUGH YOUR TOPIC IDEAS

PLEASE SEND IDEAS TO HELPDESK@ACACIACS.COM.AU

Acacia
Business Software Solutions
presents



WATERCOOLER
for clients

Disclaimer: The information presented is generic in nature and may not refer to an individual's specific requirements. If you have specific queries, please contact Acacia Consulting Services to speak with a certified Exo consultant.