



BI4Cloud

Key Benefits to Save you Time and Help Run your Business Smarter

- ✓ Dashboards to Detail
- ✓ Auto Email reports and alerts
- ✓ Consolidate multiple MYOB files – GL, Jobs, Sales, Customers, Purchases, AR, AP etc
- ✓ Comparison reports to any prior periods

P&L

- ✓ Ultimate One Page – All in one Month-End P&L:
 - Actual v Budget with Variances (\$ and %)
 - Month to date, Year to date and Last Year
 - Full year Budget and Full year Forecast (Actuals YTD + remaining Budget)
 - Summary P&L or at Account level
 - Drill down to detail transactions
 - Runs over MYOB General Ledger P&L or Jobs P&L

Sales

- ✓ Sales, gross profit, margins, discounts, quantities sold, orders by:
 - Customer or Customer Custom Lists & Fields e.g. Distrib Channel, Customer Type, Region
 - Item or Item Custom Lists & Fields e.g. Brand, Product Type
 - Time Billing Activity
 - Salesperson (either on the Invoice or on the Customer Card)
 - State, Postcode, City, Country (based on the “Invoice to” Customer)
 - Ship to address
 - Invoice number or Invoice line item detail
 - Supplier
 - GL Income Account, Job, Category
 - Invoice Stock Location
 - Any of the above by Top or Bottom 5, 10, 20, 50, 100, 500
 - Day, Week, Month, Quarter, Year or any custom date range
 - Any combination of the above e.g. Items by Customer, Brands by Salesperson
- ✓ CRM
 - Target New or Loyal Customers for email campaigns
 - Identify who has stopped buying...before it is too late
- ✓ Sales Budgets – Set Sales Budgets and monitor performance by:
 - Who is selling – Salesperson or Territory
 - Who is buying - Customer or Customer Group
 - What is sold – Item or Item Group
- ✓ KPI's
 - Invoice Count – Number of invoices issues
 - Customer Count – Number of customers served
 - Item Count – number of different items sold
- ✓ Alerts
 - Items sold below a specified minimum margin%

Inventory

- ✓ Inventory v Sales history to help with Reorders, includes:
 - Compare On hand, On Order with sales history (weekly or monthly to 12 Months)
 - Minimum Stock level
 - Reorder quantity
 - Supplier name and Supplier's Item No.
 - Item Custom Lists e.g. Brand, Product Type

- ✓ Inventory Cover to help with Reorders and Slow moving stock, includes:
 - Compare On hand with past 2 & 5 months Sales volumes
 - Calculates Number of weeks sales that can be Covered by inventory on hand
- ✓ Alerts
 - When inventory level is below or nearing Minimum quantity
 - When inventory cover falls below a set number of weeks

Jobs – Used to Manage Projects using MYOB Job Budgets

- ✓ Job List showing Income, COGS, Expenses, Profit, Margin%, Budget, Variance by:
 - Job Number
 - GL Account (P&L)
 - Category
 - Job Headers
 - Job Manager
 - Job Customer
 - Job Customer Sales rep
 - Job Customer Custom Lists & Fields e.g. Distribution Channel, Customer Type, Region
 - Job Contact (this field can be used for any purpose to group similar Jobs together independent of the Job Header structure)
 - Job Start and or Job end date
 - Job Transaction Date by Day, Week, Month, Quarter, Year or any custom date range
 - Transaction Detail including Transaction Memo & Transaction description
 - Job is Active
 - Any of the above by Top or Bottom 5, 10, 20, 50, 100, 500
 - Any combination of the above e.g. Jobs by Job Customer, Jobs by Job Manager
- ✓ Including PO's
 - Job Lists showing all the above plus including Purchase Orders and Sales Orders still on Order
 - Calculates Estimated Job Profit once all PO's come in and Sales Orders are invoiced
- ✓ Alerts
 - Job Actual Profit or Job Estimated Profit / GP% are below a specified minimum \$ or margin %
 - Job Budget variance to Actual below a specified minimum \$

Jobs – Used to Run Divisions, Cost Centres, Annual Grants etc. using Monthly Job Budgets

- ✓ Job P&L – Month end
 - One Page Job P&L – Actual v Budget & Variance, Month to date, YTD, Last Year, Full year
 - Job P&L Pivot with Jobs (or Job Headers as Columns across the page)
 - Monthly Job P&L Actual v Budget
- ✓ Job List & Job P&L showing Income, COGS, Expenses, Profit, Budget, Variance by:
 - Job Number
 - GL Account (P&L)
 - Category
 - Job Headers
 - Job Manager
 - Job Customer, Job Contact (these fields can be used for any purpose to group similar Jobs)
 - Job Transaction Date by Day, Week, Month, Quarter, Year or any custom date range
 - Transaction Detail including Transaction Memo & Transaction description
 - Any combination of the above e.g. Jobs by Job Header, Jobs v Category
- ✓ Alerts
 - Job over budget by GL account (by month or year to date)

Purchases

- ✓ Purchase invoices, quantities, purchase cost, purchase orders by:
 - Supplier
 - Item
 - Item Custom Lists & Fields e.g. Brand, Product Type
 - Job and Category
 - Any of the above by Top or Bottom 5, 10, 20, 50, 100, 500
 - Day, Week, Month, Quarter, Year or any custom date range
 - Any combination of the above e.g. Items by Supplier, Forward PO's by Job or Item