

BI4Cloud

Sales Budgets

Sales Budgets in BI4Cloud



BI4Cloud

Set Levels

- Budget at three levels
 - Level 1 – Who is Selling : SalesRep or Employee CustomList 1,2,3
 - Level 2 – Who is Buying : Customer or Customer CustomList 1,2 3
 - Level 3 – What is Bought : Item or Item CustomList 1,2,3

Setup Levels

This is where you choose the levels at which you budget.

How do you choose the detail that right for you ?

Cool Stuff
Clearwater Pty Ltd BI4 (1) FY 2016 July 2015 - June 2016

Feature Tour | Menu | Exit & Save

Sales Budgets

Level 1

Level 2

Level 3

Financial Year This FY(2016) ▾

Choose the dimension to budget against

- Who is selling (Level 1)
- Who is buying (Level 2)
- What is bought (Level 3)

Salesperson Customer Item Refresh

Salesperson	Budget Amount	
<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <input style="width: 80%; border: none;" type="text"/> ▾ </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <input style="width: 80%; border: none;" type="text"/> ▾ </div>	
<div style="display: flex; align-items: flex-start;"> ▼ <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <input style="width: 80%; border: none;" type="text"/> ▾ </div> </div>	0	
Customer	Budget Amount	
<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <input style="width: 80%; border: none;" type="text"/> ▾ </div>	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <input style="width: 80%; border: none;" type="text"/> ▾ </div>	
A-Z Stationery Supplies	0	<input style="width: 80%; border: none;" type="text"/> Budgets
A-Z Stationery Supplies West Wyalong	0	<input style="width: 80%; border: none;" type="text"/> Budgets
Brown,Sue	0	<input style="width: 80%; border: none;" type="text"/> Budgets
Cameron,James	0	<input style="width: 80%; border: none;" type="text"/> Budgets
Cash Sales	0	<input style="width: 80%; border: none;" type="text"/> Budgets
Chelsea Mosset	0	<input style="width: 80%; border: none;" type="text"/> Budgets
Davis,Chris	0	<input style="width: 80%; border: none;" type="text"/> Budgets
Footloose Dance Studio	0	<input style="width: 80%; border: none;" type="text"/> Budgets



Display Level 1 and 2

Level 1 SalesRep

Level 2 Customer

If many customers this could be too much detail

* VERY DETAIL *

Cool Stuff
Clearwater Pty Ltd BI4 (1) FY 2016 July 2015 - June 2016 [Feature Tour](#) [Menu](#) [Exit & Save](#)

Sales Budgets
Level 1 Level 2 Level 3 Financial Year:
Salesperson Customer Item Refresh

Salesperson		Budget Amount
<input type="text"/>		<input type="text"/>
▼ Jones, Mary		0
Customer		Budget Amount
<input type="text"/>		<input type="text"/>
A-Z Stationery Supplies		0 <input type="text"/> Budgets
A-Z Stationery Supplies West Wyalong		0 <input type="text"/> Budgets
Brown,Sue		0 <input type="text"/> Budgets
Cameron,James		0 <input type="text"/> Budgets
Cash Sales		0 <input type="text"/> Budgets
Chelsea Mosset		0 <input type="text"/> Budgets
Davis,Chris		0 <input type="text"/> Budgets
Footloose Dance Studio		0 <input type="text"/> Budgets



Budget Entry Level 3

Level 3 Item

Many items → Very Detail

* VERY DETAIL *

Edit Sales Budget Close

Salesperson Jones, Mary
Customer A-Z Stationery Supplies
Financial Year 2016

Save changes Cancel changes

Item Description	FY Total	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
1 hour - Cooler Service	0	0	0	0	0	0	0	0	0	0	0	0	0
1 hour - Other Services	0	0	0	0	0	0	0	0	0	0	0	0	0
1 Hour - Travel	0	0	0	0	0	0	0	0	0	0	0	0	0
12 Litres Clear Carbon	0	0	0	0	0	0	0	0	0	0	0	0	0
12 Litres North Spring	0	0	0	0	0	0	0	0	0	0	0	0	0
12 Litres Orange Carbon	0	0	0	0	0	0	0	0	0	0	0	0	0
20 Litres Clear Carbon	0	0	0	0	0	0	0	0	0	0	0	0	0
20 Litres North Spring	0	0	0	0	0	0	0	0	0	0	0	0	0
20 Litres Orange Carbon	0	0	0	0	0	0	0	0	0	0	0	0	0
20 Litres South Spring	0	0	0	0	0	0	0	0	0	0	0	0	0
Coffee Powder	0	0	0	0	0	0	0	0	0	0	0	0	0
Comment	0	0	0	0	0	0	0	0	0	0	0	0	0
Budget Total:	0	0	0	0	0	0	0	0	0	0	0	0	0

1 2 3 4 Page 1 of 4, Items 1 to 12 of 40.



Cool Stuff
Clearwater Pty Ltd BI4 (1)

FY 2016 July 2015 - June 2016

[Feature Tour](#) | [Menu](#) | [Exit & Save](#)

Sales Budgets

Level 1 Level 2 Level 3 Financial Year

Salesperson Customer Group Item Group

Refresh

Salesperson		Budget Amount	
<input type="text"/>		<input type="text"/>	
▼ Jones, Mary		0	
Customer Group		Budget Amount	
<input type="text"/>		<input type="text"/>	
BigW		0	<input type="text"/> Budgets
BiLo		0	<input type="text"/> Budgets
K-Mart		0	<input type="text"/> Budgets
▶ Long, Alan		0	
▶ Parker, Peter		0	
▶ Smith, Sue		0	

Display Level 1 and 2

Level 1 SalesRep

Level 2 Customer Group

Better when many customer

* LESS DETAIL *

Too much detail ?

Q:

My organization doesn't budget to that level of detail. We only budget to Sales Rep.

Can I still use your system ?

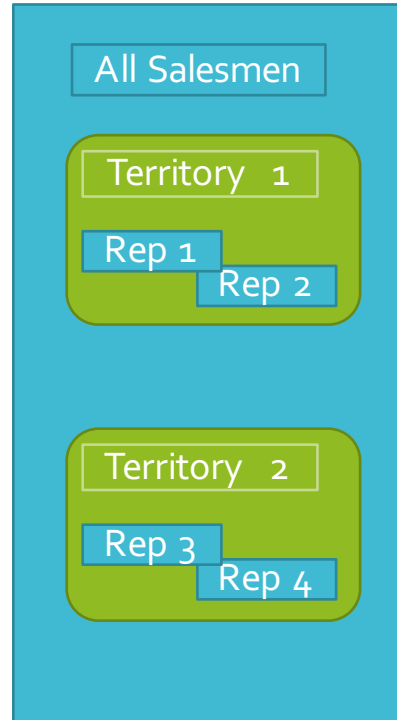
A:

Yes.

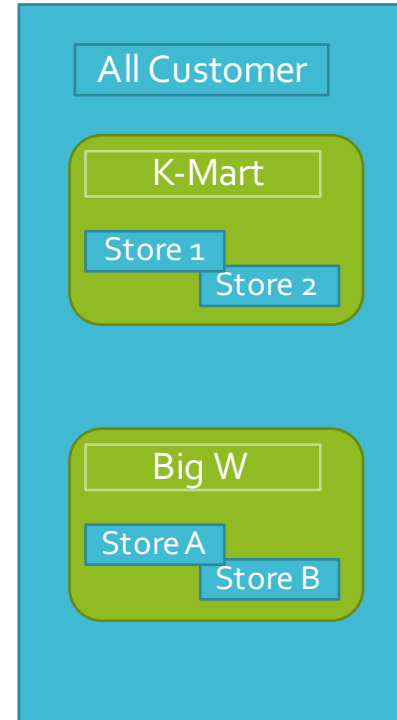
Control the level of detail in each budget level by setting what granularity required eg. to a custom list that contain all or some of the elements.

Use Budget Level to Define detail

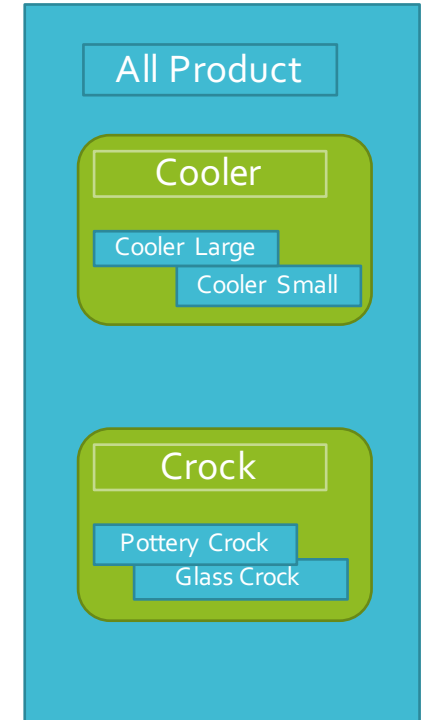
Budget Level 1



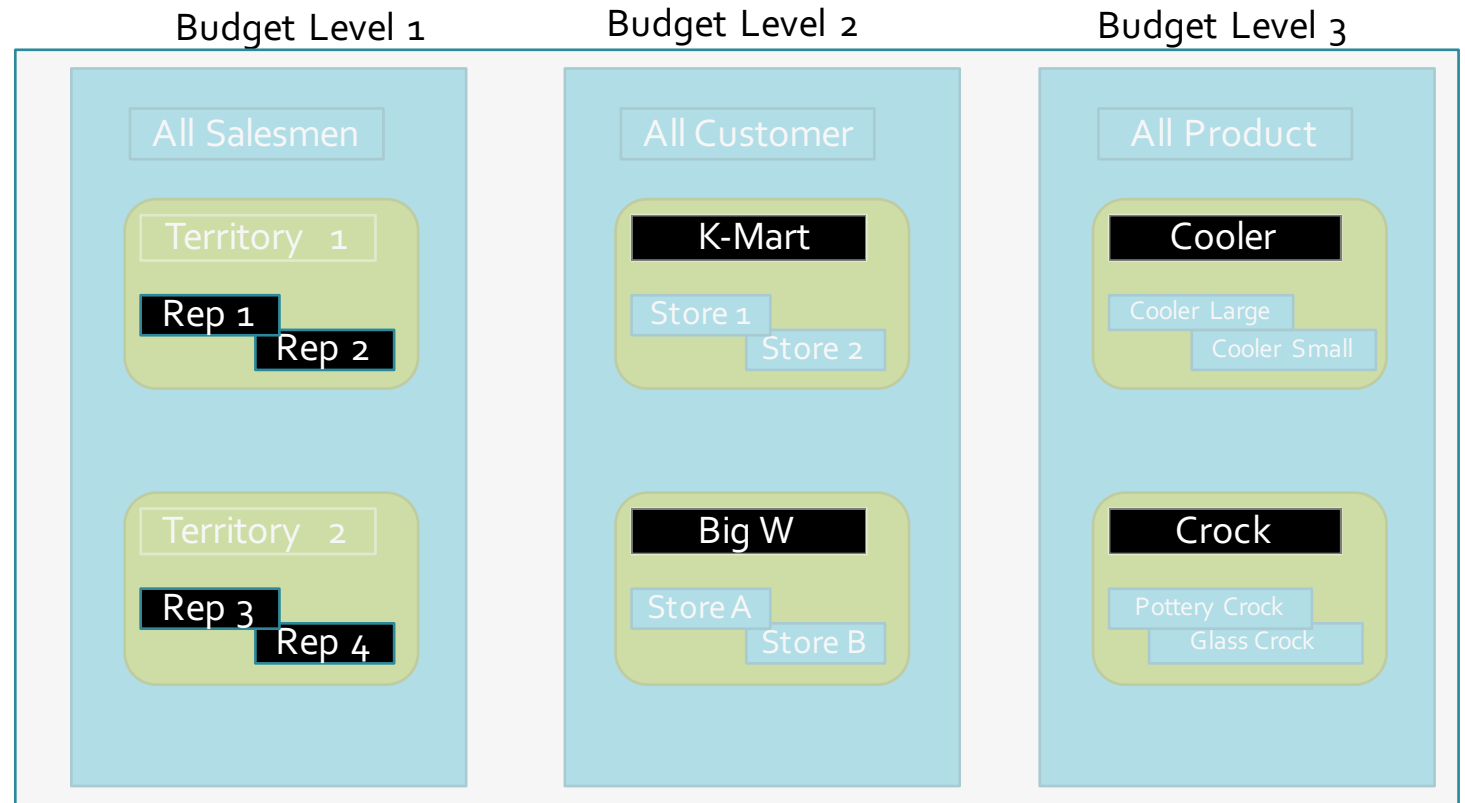
Budget Level 2



Budget Level 3



Use Budget Level to Define detail






Budget by Rep, Customer Group, Item Group

Analyze By SalesPerson All **Then By** SalesPerson **Order By** Total Budget Asc **Group By** (No grouping)

Wizard Advanced Favorites Dashboards Save Update Print Email Now Export CSV Compare Visualize +/- Cols Filters Refresh Data Cool Charts Table Horiz

Companies → MYOB Item Sales Budget 5.4 → SalesPerson

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu)    Last Updated: 05/05/16 3:40:15 PM

Salesperson	Total Sales	Total Budget	Variance
.	\$3,451.96	\$0.00	\$3,451.96
Parker, Peter	\$1,418.18	\$0.00	\$1,418.18
Long, Alan	\$2,205.52	\$0.00	\$2,205.52
Jones, Mary	\$2,441.74	\$23,990.00	-\$21,548.26
Grand Total(4)	\$9,517.39	\$23,990.00	-\$14,472.61

Reports By SalesRep

Reports By Customer Group

Analyze By: Customer Group | All | **Then By**: SalesPerson | **Order By**: Total Budget | Asc | **Group By**: (No grouping)

Wizard Advanced Favorites Dashboards Save Update Print Email Now Export CSV Compare Visualize +/- Cols Filters Refresh Data Cool Charts Table Horz

Companies → MYOB Item Sales Budget 5.4 → SalesPerson → Customer Group

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu) | **Last Updated:** 05/05/16 3:40:15 PM

Customer Group	Total Sales	Total Budget	Variance
K-Mart	\$4,296.43	\$0.00	\$4,296.43
BiLo	\$2,160.37	\$11,700.00	-\$9,539.63
BigW	\$3,060.60	\$12,290.00	-\$9,229.40
Grand Total(3)	\$9,517.39	\$23,990.00	-\$14,472.61

Reports By Item Group

Analyze By Item Group ▼ All ▼
Then By SalesPerson ▼
Order By Total Budget ▼ Asc ▼ +
Group By (No grouping)

Wizard Advanced Favorites Dashboards Save Update Print Email Now Export CSV Compare Visualize +/- Cols Filters Refresh Data Cool Charts Table Horiz

Companies → MYOB Item Sales Budget 5.4 → SalesPerson → Customer Group → Item Group

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu) 📅 ⏪ ⏩ **Last Updated:** 05/05/16 3:40:15 PM

Item Group	Total Sales	Total Budget ↕	Variance
Filter	\$2,894.90	\$0.00	\$2,894.90
Misc	\$635.00	\$0.00	\$635.00
N/A	\$462.95	\$0.00	\$462.95
Other	\$138.18	\$0.00	\$138.18
Water	\$3,339.55	\$0.00	\$3,339.55
Crocks	\$203.64	\$8,290.00	-\$8,086.36
Cooler	\$1,843.18	\$15,700.00	-\$13,856.82
Grand Total(7)	\$9,517.39	\$23,990.00	-\$14,472.61

Analyze By Item Group All **Then By** Sales By Month **Order By** Item Group Asc **Group By** Customer Group All

Wizard Advanced Favorites Dashboards Save Update Print Email Now Export CSV Compare Visualize +/- Cols Filters Refresh Data Cool Charts Table Horz Stack Stk % Vert Stack Stk % Line Arial Unicode 8 100% Scri

Companies → MYOB Item Sales Budget 5.4 → **Item Group by Customer Group**

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu) **Last Updated:** 05/05/16 3:40:15 PM

Item Group	Total Sales	Total Budget	Variance
Cooler	\$0.00	\$4,700.00	-\$4,700.00
Crocks	\$203.64	\$7,550.00	-\$7,386.36
Filter	\$1,703.10	\$0.00	\$1,703.10
Misc	\$535.00	\$0.00	\$535.00
Total(4) BigW	\$2,441.74	\$12,290.00	-\$9,848.26
Cooler	\$0.00	\$11,000.00	-\$11,000.00
Crocks	\$0.00	\$700.00	-\$700.00
Total(2) BiLo	\$0.00	\$11,700.00	-\$11,700.00
SalesPerson Total(2) Jones, Mary - 7647605627828039730	\$2,441.74	\$23,990.00	-\$21,548.26
Cooler	\$425.00	\$0.00	\$425.00
Total(1) BiLo	\$425.00	\$0.00	\$425.00
Filter	\$660.97	\$0.00	\$660.97
Misc	\$100.00	\$0.00	\$100.00
Other	\$138.18	\$0.00	\$138.18
Water	\$881.36	\$0.00	\$881.36
Total(4) K-Mart	\$1,780.52	\$0.00	\$1,780.52
SalesPerson Total(2) Long, Alan - 4868004475951363471	\$2,205.52	\$0.00	\$2,205.52
Cooler	\$1,418.18	\$0.00	\$1,418.18
Total(1) K-Mart	\$1,418.18	\$0.00	\$1,418.18
SalesPerson Total(1) Parker, Peter - 3162613720893138053	\$1,418.18	\$0.00	\$1,418.18
N/A	\$278.86	\$0.00	\$278.86
Water	\$340.00	\$0.00	\$340.00
Total(2) BigW	\$618.86	\$0.00	\$618.86
Filter	\$530.82	\$0.00	\$530.82
Water	\$1,204.55	\$0.00	\$1,204.55
Total(2) BiLo	\$1,735.37	\$0.00	\$1,735.37
N/A	\$184.09	\$0.00	\$184.09
Water	\$913.64	\$0.00	\$913.64
Total(2) K-Mart	\$1,097.73	\$0.00	\$1,097.73

Reports Hierarchy

Qtr Pivot

Analyze By Customer Group All v Sales By Quarter All **Order By** Customer Group **Group By** (No grouping) **Display** All (H)

[Wizard](#) [Advanced](#) [Favorites](#) [Dashboards](#) [Save](#) [Update](#) [Print](#) [Email Now](#) [Export +/-](#) [Cols](#) [Filters](#) [Refresh Data](#) [Cool Charts](#) [Table](#) [Horz](#) [Stack](#) [Stk %](#) [Vert](#) [Stack](#) [Stk %](#) [Line](#)

Companies → MYOB Item Sales Budget 5.4 → **Customer Group v. Quarter**

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu) **Last Updated:** 05/05/16 3:40:15 PM

Display: Total Sales, Total Budget, Variance

	Q1 2016			Q2 2016			Q3 2016			Q4 2016			Total		
	Total Sales	Total Budget	Variance	Total Sales	Total Budget	Variance	Total Sales	Total Budget	Variance	Total Sales	Total Budget	Variance	Total Sales	Total Budget	Variance
BigW	\$2,365.28	\$1,100.00	\$1,265.28	\$61.77	\$2,690.00	-\$2,628.23	\$633.55	\$5,200.00	-\$4,566.45	\$0.00	\$3,300.00	-\$3,300.00	\$3,060.60	\$12,290.00	-\$9,229.40
BiLo	\$2,160.37	\$2,200.00	-\$39.63	\$0.00	\$3,500.00	-\$3,500.00	\$0.00	\$4,000.00	-\$4,000.00	\$0.00	\$2,000.00	-\$2,000.00	\$2,160.37	\$11,700.00	-\$9,539.63
K-Mart	\$2,569.39	\$0.00	\$2,569.39	\$1,727.04	\$0.00	\$1,727.04	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,296.43	\$0.00	\$4,296.43
Grand Total(3)	\$7,095.03	\$3,300.00	\$3,795.03	\$1,788.81	\$6,190.00	-\$4,401.19	\$633.55	\$9,200.00	-\$8,566.45	\$0.00	\$5,300.00	-\$5,300.00	\$9,517.39	\$23,990.00	-\$14,472.61

Analyze By Customer Group All **Then By** SalesPerson **Order By** Customer Group Asc **Group By** (No grouping)

Wizard Advanced Favorites Dashboards Save Update Print Email Now Compare Visualize +/- Cols Filters Refresh Data Cool Charts Table

Companies → MYOB Item Sales Budget 5.4 → **Customer** → Customer Group

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu) **Last Updated:** 05/05/16 3:40:15 PM

Total Budget, Total Sales by Customer Group

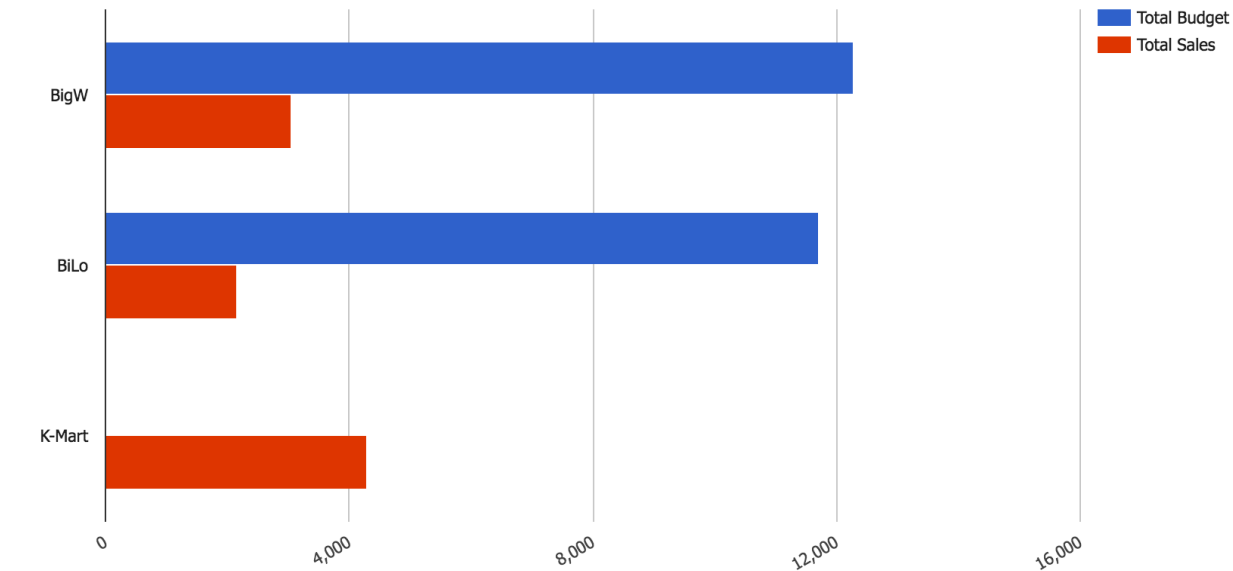


Chart Actuals Vs Budgets



BI4Cloud

Visual Table

Analyze By Item Group All **Then By** SalesPerson

Wizard Advanced Favorites Dashboards Save Update Print Email Now Compare

Companies → **MYOB Item Sales Budget 5.4** → **Customer Group** → **Item**

Sales Date: 01/07/15 (Wed) -- 30/06/16 (Thu) **Last Updated:** 05/

Item Group	Total Budget ▲	Total Sales
Other	<input type="text" value="\$0.00"/>	<input type="text" value="\$138.18"/>
N/A	<input type="text" value="\$0.00"/>	<input type="text" value="\$462.95"/>
Misc	<input type="text" value="\$0.00"/>	<input type="text" value="\$635.00"/>
Filter	<input type="text" value="\$0.00"/>	<input type="text" value="\$2,894.90"/>
Water	<input type="text" value="\$0.00"/>	<input type="text" value="\$3,339.55"/>
Crocks	<input type="text" value="\$8,290.00"/>	<input type="text" value="\$203.64"/>
Cooler	<input type="text" value="\$15,700.00"/>	<input type="text" value="\$1,843.18"/>

When

- End April - Budget entry and tabular reports
- End June – Sales Budget Dashboard
- For Enterprise 5 and above