DataSelf Enterprise – Core Financials – Sample Templates

These templates have a wide range of configuration possibilities to adapt to unique business needs. Actual templates might vary. Some might require additional configuration not included in SOWs unless specifically described.

AADS = Advanced Analytics by DataSelf.

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Natural Language Query (NLQ)

Also included in AADS. Like searching on the internet, type in keywords about your data in DataSelf, and an instant and accurate report is created. This is available for each data set in DataSelf, and might require additional configuration to meet your company’s needs.

Searching for “Contract Remain Amt by Project” yields:

[Diagram of Contract Remain Amt by Project]

Searching “Sales by Salesperson by Month in 2019 as a text table” yields:

[Diagram of Sales by Salesperson by Month]

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Searching for “Tran Cost by Acct Group in 2017 by month” yields:

Core Financials: AP, AR and GL

There are 1,000+ templates offering a wide range of configuration possibilities to adapt to unique business needs. Actual templates might vary. Some might require additional configuration not included in SOWs unless specifically described.

360-View Dashboards (a couple included with AADS from a single data source)

KPIs from different systems such as the ERP, CRM, Google Analytics, Payroll and Excel. Clicking on a KPI will drill down into more details. Dashboards like this are usually tailored for C-level executives based on their specific KPI needs.

This is a preconfigured P&L Dashboard that can be easily adjusted. Budget amounts can come from the ERP, Excel or user-input.
Financial KPIs and Ratios
Dozens of pre-configured dashboards provide insights into financial KPIs from P&L and Balance Sheet. The example below focuses on wage ratios against other metrics.

Profit and Loss Reports (a few included with AADS)
Extensive library of P&L reports with easy slicing and dicing.
This template shows P&L by month across years.

Percent of a Metric: Keeping track of your financials against your sales (revenues) or gross profit or other metrics can quickly highlight important trends. For instance, why marketing expenses are trending up against their percentage of sales?

Single-Page Analytics provides extensive ways to slice and dice financials on a single page. Users can easily select periods, measures (such as budget and variances), and drill down all the way to GL Batch information – everything on a single page. Watch our 2-min video at https://www.youtube.com/watch?v=Uh5mNp1SNcs.
Multi-Company Environment: DataSelf provides comprehensive ways to consolidate data from multi-company systems. The data is normalized and consolidated in the DataSelf data warehouse, and then it becomes easy and fast to report from single companies, groups of companies, or across all of them. The example below shows 3 business units and the consolidated total.

<table>
<thead>
<tr>
<th>YTD Profit and Loss by Business Unit</th>
<th>Consolidated</th>
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<tbody>
<tr>
<td><strong>Sales</strong></td>
<td><strong>$1,868,157</strong></td>
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<tr>
<td><strong>Revenue</strong></td>
<td><strong>$1,868,157</strong></td>
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<td><strong>Sales</strong></td>
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<td><strong>Cost of Sales</strong></td>
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<td><strong>Revenue</strong></td>
<td><strong>$1,868,157</strong></td>
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<tr>
<td><strong>Cost of Sales</strong></td>
<td><strong>$1,868,157</strong></td>
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Balance Sheet

Extensive library of Balance Sheet reports with easy slicing and dicing. These templates have a similar framework of the P&L reporting above.
Multi-Currency Consolidation: DataSelf provides comprehensive ways to consolidate multi-currency systems. The data is normalized and consolidated in the DataSelf data warehouse, and then it becomes easy and fast to report on single or multiple currencies. The example below shows the financials from 3 business units working with different currencies, how they relate to the consolidated currency USD, and the total.

![Financials Example](image.png)

**AR Aging with Proforma (included with AADS)**

Easily combine AR Aging with proforma invoices for a more complete view of your cash flow.

![AR Aging with Proforma](image.png)

**Payables (included with AADS)**

Hundreds of Payables reports and dashboards allow users to quickly visualize and analyze AP trends. The dashboard below gives an overview of AP by total, vendor, due date, bill and all details. Selecting data points filters the dashboard.
**Budgeting:** DataSelf can combine actuals data with budgets coming from your source system, or Excel files, or directly from user input. Setting up Budgeting and forecasting requires an understanding of the client’s specific needs, and might require additional configuration not included in SOWs unless specifically described.

<table>
<thead>
<tr>
<th>Activity</th>
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</table>

**CRM: Contact, Opportunity and Tech Support - Optional**

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**Opportunities**
Slice and dice your opportunities by different dimensions.

**Sales Velocity**
A powerful method to analyze the efficiency of your sales processes and team.
Sales Funnel
Easy and interactive ways to slice and dice your sales funnel.

Stuck Opportunities
Many stuck opportunities need work to move forward, otherwise many will be gone. Be on top of them easily.

Marketing Campaigns with User Traction – Optional
Opens & Clicks KPIs
Easy and interactive ways to analyze which companies and individuals have been consuming your eBlasts across campaigns and time.
Open and Click Trends and KPIs by Client
Easy and interactive ways to analyze trends from companies and individuals consuming your eBlasts across campaigns.

Open & Click Trends Across Campaigns
Interactive ways to analyze how opens and clicks perform across campaigns and time.

Google Analytics and E-Commerce - Optional
These templates have a wide range of configuration possibilities to adapt to unique business needs. Actual templates might vary. Some might require additional configuration not included in the SOW.

You can find a more complete full list of DataSelf templates at https://www.dataself.com/templates/.