

Sophisticated Financial Analysis in FileMaker®

Genesis Business Metrics

Make Informed Decisions with Genesis Business Metrics

Genesis Business Metrics is a powerful tool for turning financial data into valuable information.

Seamlessly integrated with Genesis Accounting or used with information from any accounting system, Genesis Business Metrics includes a variety of financial tools that deliver real-time understanding of business performance. Financial analysis using unique visual presentations communicate the interaction between related pieces of accounting data, bringing the whole financial picture into focus.

In addition to comprehensive Financial Reporting, Genesis Business Metrics is a:

- ▶ **Financial Literacy Tool** – Accessible and understandable information presented in a way that demystifies accounting and financial data
- ▶ **Business Decision Making Tool** – Slice and dice your financial data in a variety of ways to get the most detailed and accurate picture of your financial well being
- ▶ **Budgeting and Scenario Tools** – Understand the past and strategize the future. Import budgets or projections from Excel. Compare budgets with actuals and create unlimited “What-if” scenarios to inform your long-term plans

Business Decision Making Tools



Perfect for executives, manager, and teams

View the business over time with trend reports of data in many views. Give your financial planners:

- ▶ Easy access to financial information
- ▶ The tools that empower them to plan and project

Leverage budget and scenario tracking by easily:

- ▶ Comparing against actuals
- ▶ Revising and comparing to revised versions

Import Financial Information



Import data from other applications and Excel

Import actuals from another accounting program:

- ▶ Income Statements
- ▶ Trial Balances

Import other Information:

- ▶ Budgets
- ▶ Projections
- ▶ Scenarios

Easy integration of external data via SQL, XML, or REST using JSON.

Advantages for Users of Genesis Accounting

- Direct connection to current, live accounting data
- No need to import actuals nor connect to external application
- Integrated consistent user interface
- No need to import Chart of Accounts
- Complete “drill down” to underlying details from all views



- ▶ Detail or summary
- ▶ Chart of Accounts has seven segments:
 - ▶ Account
 - ▶ Department
 - ▶ Job
 - ▶ 4 user-defined segments
 - ▶ A variety of specific segment-based reports
- ▶ Account Groups summarize related Accounts
- ▶ Summarize by any segment (suppress accounts if desired)

Flexible Financial Statements



Income Statement



Multi-level Income Statements by Segments

- ▶ Select period or period and year-to-date
- ▶ Filter on a single segment value – a single department on a statement
- ▶ Include all of a segment's values – all departments on a statement Sort and summarize by your segments in any order, e.g.:
 - ▶ Job, Department, Account Group
 - ▶ Account Group, Department
 - ▶ Department, Product Line, Account
 - ▶ Contract, Account Group
 - ▶ Location/Region, Product Line, Contract
 - ▶ Region, Department, Contract, Account Group
Etc.

Comparative Multi-level Income Statement by Segments

- ▶ All the features of Multi-level Income Statements plus comparisons
- ▶ Compare actuals to actuals for any periods
 - ▶ Month vs. month
 - ▶ Quarter vs. quarter
 - ▶ Year vs. year
 - ▶ Different periods – same year
 - ▶ Same periods – different years
- ▶ Compare budgets to actuals for any periods

Balance Sheets



Multi-level Balance Sheets

- ▶ Two-level by account groups and accounts
- ▶ Single-level by account group or account only
- ▶ Full support for multiple entities (separate companies or subsidiaries or divisions with their own balance sheets)

Compare actuals to actuals

- ▶ Month vs. month
- ▶ Quarter vs. quarter
- ▶ Year vs. year
Different periods – same year
- ▶ Same periods – different years

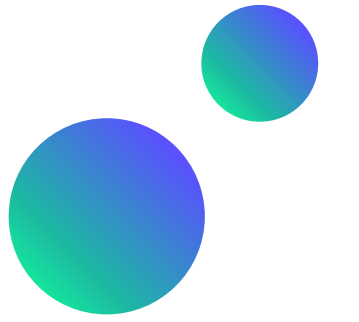
Budgets, Projections,
Unlimited Scenarios



All the features of
Multi-level and
Comparative
Income
Statements
plus...

Import from Excel Spreadsheets

- Budgets
- Projections
- Scenarios
- Actuals from any other accounting



- ▶ Budget vs. Actual
- ▶ Budget vs. Budget
- ▶ Scenario vs. Actual
- ▶ Scenario vs. Scenario

Compare
for Any
Periods



Budget, projections and scenarios

- for the entire company
- by Department
- by Product Line
- by Location
- by sales person



- ▶ Compare them to earlier versions
- ▶ Compare them to actuals

Revise and
easily evaluate
changes



Additional Features



Additional Features of Genesis Business Metrics

- ▶ Trial Balances for unlimited years of historical activity
- ▶ Trial Balances by any date (including mid-month)
- ▶ Flexible exports of aging reports to Excel
- ▶ Charting of financial trends – multiple bar charts and line charts (especially helpful for communicating with non-Finance members of team)
- ▶ Customizable Dashboard – ranking, charting, and forecasting revenue and profit by category of business activity, for instance by:
 - ▶ Customer
 - ▶ Customer, Type, Product, Product Type, Salesperson, Personnel
 - ▶ more... (user definable)

Explore Genesis Today!