The Calendar Wizard

Setup Guide

Document Details

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System Requirements

- CES Version 10.00.00.00 or higher

Overview

This document shows you how to use the Calendar Wizard to quickly, accurately, and easily setup your Financial, Reporting, and Post Calendars for the upcoming fiscal year.

Download the latest version of this document here:
https://links.crunchtime.com/EMSG-TheCalendarWizard

… or scan the QR code to the left.

Watch the video walk through for this topic here:
https://links.crunchtime.com/EMVD-UpdateCrunchtimeCalendar

Related User Group Permissions

Screen Name	Control Name	Description
Financial Calendar	Add/Delete/Copy/Save	Allows users to add periods/dates to the Financial, Post, Reporting, Scheduled Closed, Promotions, or Holiday calendars; copy or delete periods; and save changes
Financial Calendar	Calendar Wizard	Enables this button, which opens the wizard for guiding users through setting up the Global (Financial & Reporting) and Location Post Calendars.

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SETUP GUIDE

Financial Calendar

The Calendar Wizard

Introduction

The Calendar Wizard makes it easy to correctly setup your Financial, Reporting, and Post Calendars by including past calendar information, automating period configuration, and allowing you to copy calendars to multiple locations with just a few clicks.

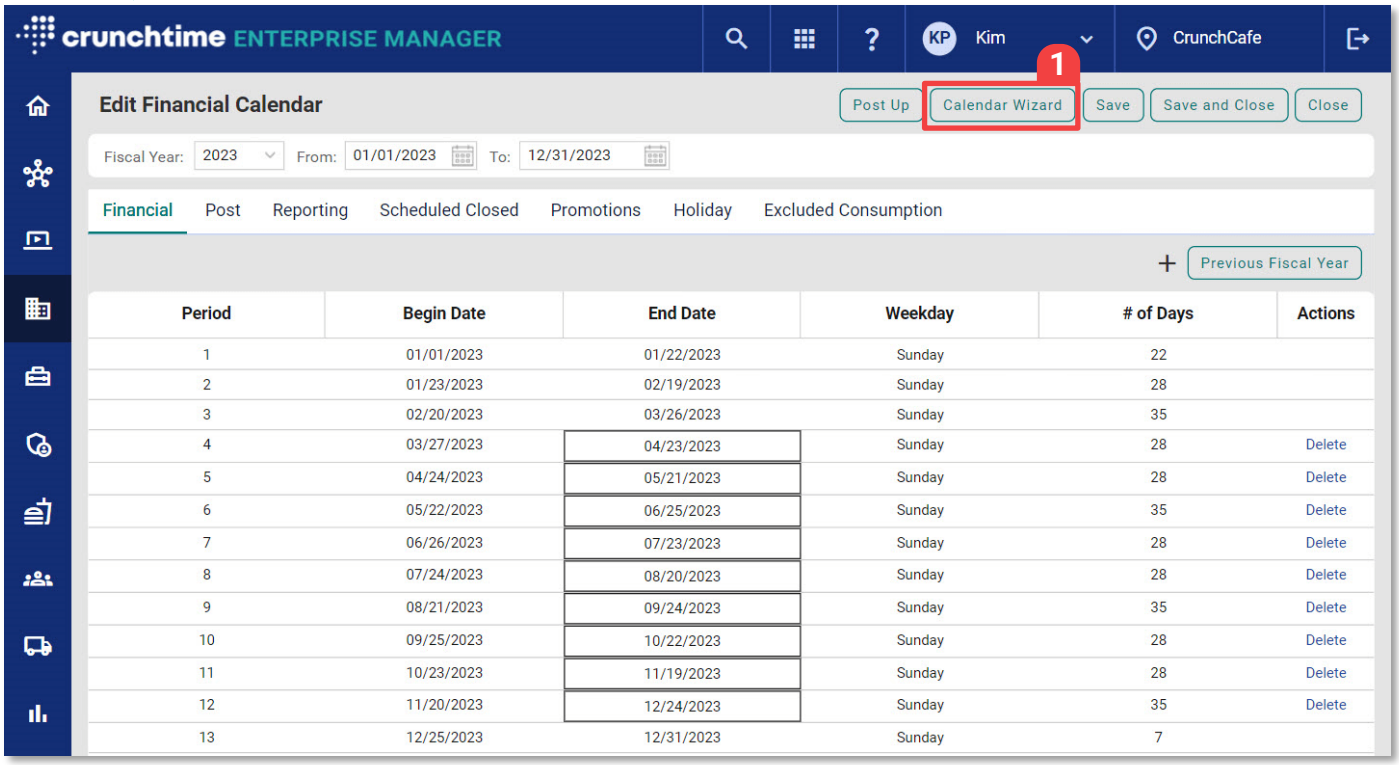
Important: Setting up your Financial, Post, and Reporting Calendars is a critical required step, and must be done so that your users can continue to:

- Place Vendor Orders
- Enter & Post Inventories
- Create Labor Schedules & Import Time Records

Getting Started

Franchisee Note: Each Franchisee entity must create all calendars from their respective Enterprise Manager instances. Corporate can use the *Today's Corporate Tasks* Dashboard widget to see which Franchisees still need to complete their calendar setup.

Enterprise Manager > Corporate: Financial Calendar



Period	Begin Date	End Date	Weekday	# of Days	Actions
1	01/01/2023	01/22/2023	Sunday	22	
2	01/23/2023	02/19/2023	Sunday	28	
3	02/20/2023	03/26/2023	Sunday	35	
4	03/27/2023	04/23/2023	Sunday	28	Delete
5	04/24/2023	05/21/2023	Sunday	28	Delete
6	05/22/2023	06/25/2023	Sunday	35	Delete
7	06/26/2023	07/23/2023	Sunday	28	Delete
8	07/24/2023	08/20/2023	Sunday	28	Delete
9	08/21/2023	09/24/2023	Sunday	35	Delete
10	09/25/2023	10/22/2023	Sunday	28	Delete
11	10/23/2023	11/19/2023	Sunday	28	Delete
12	11/20/2023	12/24/2023	Sunday	35	Delete
13	12/25/2023	12/31/2023	Sunday	7	

1 From the Financial Calendar screen, select the *Calendar Wizard* button to get started.

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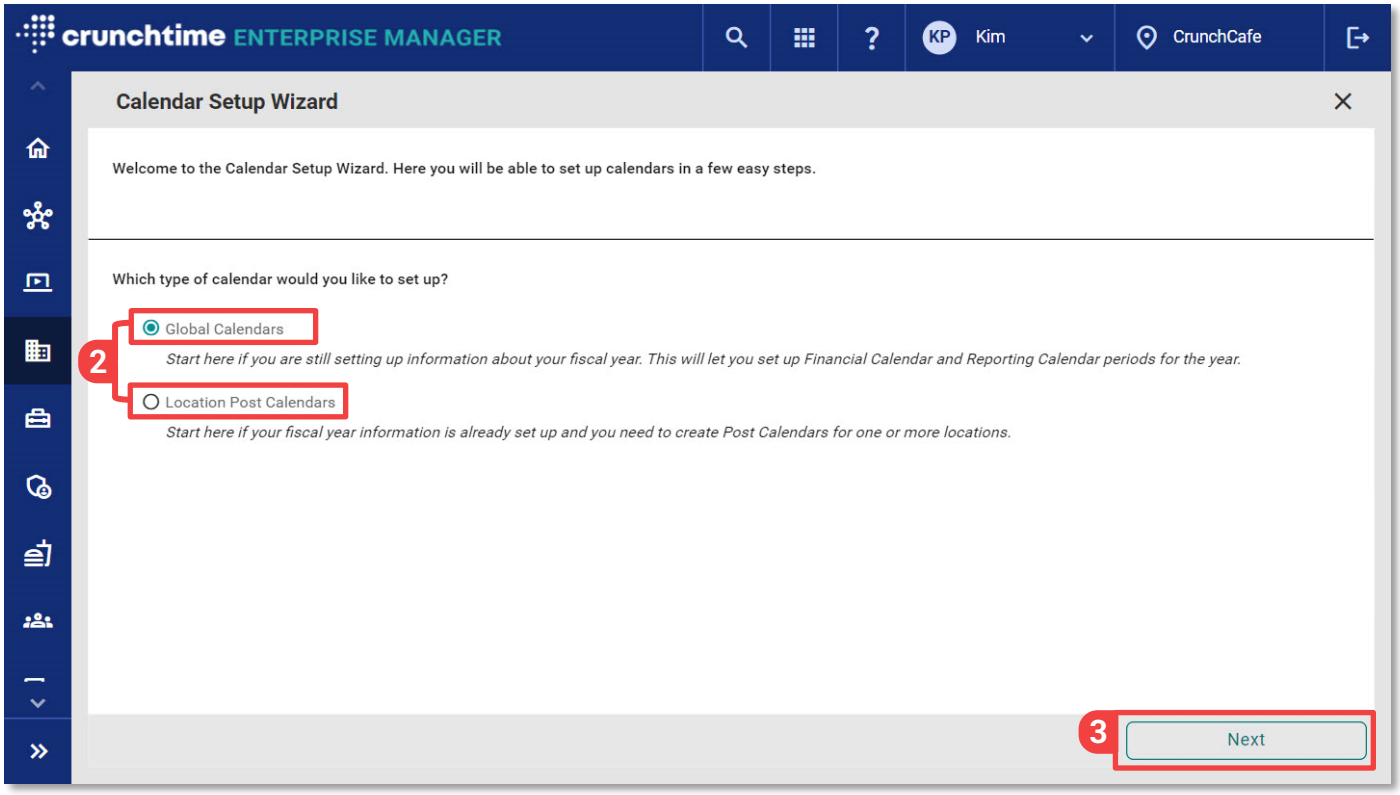
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Financial Calendar

The Calendar Wizard (Continued)

Getting Started (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard



2 Choose to create either *Global Calendars* (Financial and Reporting) or *Location Post Calendars*.

Note: The Financial Calendar for the fiscal year must be built before you can create Post Calendars.

3 Select *Next*.

- For steps to create the *Global Calendars*, proceed to the next page.
- For steps to create the *Location Post Calendars*, proceed to Page 8.

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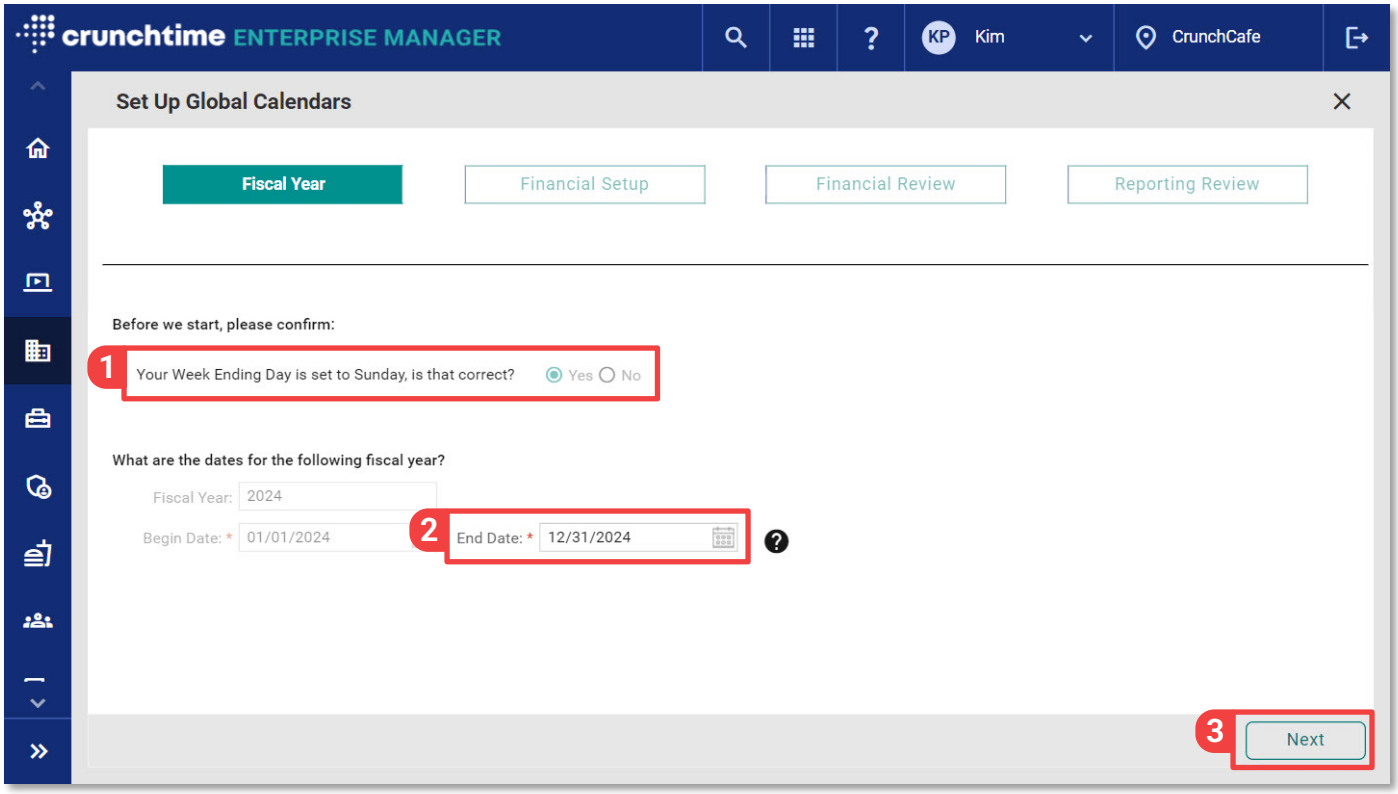
Financial Calendar

The Calendar Wizard (Continued)

Create the Global Calendars

The Wizard uses some minimal data from your existing calendars, so before you use it for the first time, you need to review and confirm that everything is accurate, so the Wizard has the cleanest information possible.

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard



1. Take a moment to confirm your Week Ending Day is correct. Select *Yes* when you're ready to continue. (The selection defaults to *No*, and must be changed to *Yes* to proceed).
2. Select the *End Date* for the upcoming fiscal year. It is recommended but not required to select an End Date that falls on the Week Ending Day.

Note: The Wizard will automatically populate the *Fiscal Year* and *Begin Date* based on the previous fiscal year in Enterprise Manager. The Begin Date will be set to the date immediately after the End Date of the previous year. *Example: If the 2026 fiscal year ends on 7/31/2027, the Wizard will set the Begin Date for the 2027 fiscal year to 8/1/2027.*

Tip: Hover over the (?) icon to display the dates for the past three fiscal years. This makes it easy to ensure the End Date you select is consistent with your company's past fiscal years.

3. Choose *Next* to continue.

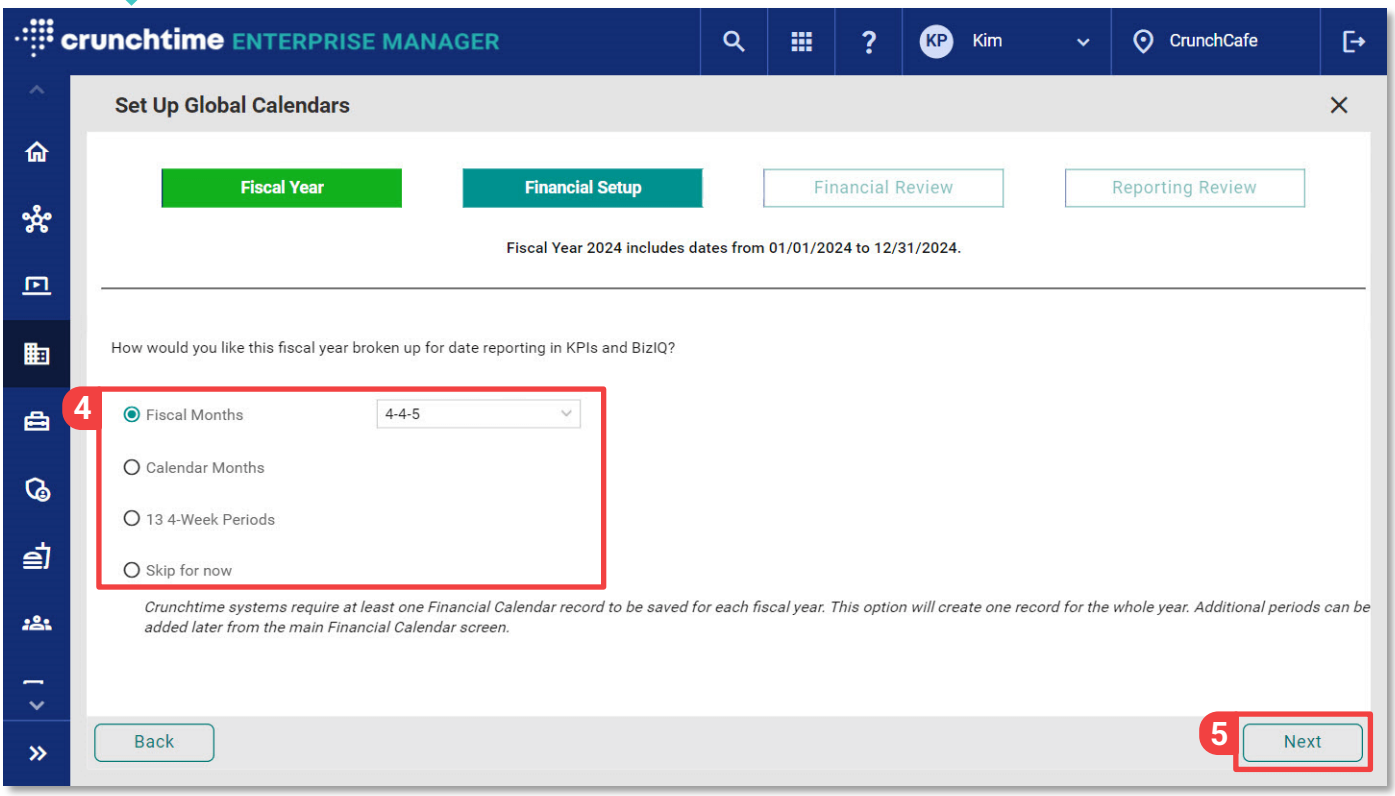
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Financial Calendar

The Calendar Wizard (Continued)

Create the Global Calendars (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Global Calendars



4. Choose how to break up the fiscal year. This will determine reporting dates in KPIs and BizIQ. Options include:
   - *Fiscal Months* – Creates periods consisting of either 4 or 5 weeks (28 or 35 days), as determined by your selection in the drop down menu ('4-4-5', '4-5-4', or '5-4-4'). *Note: A shorter last period may be added to bring the Financial Calendar up through the selected End Date.*
   - *Calendar Months* – Creates 12 periods, each beginning on the first day of the month and ending on the last day of the month.
   - *13 4-Week Periods* – Creates 13 equal 4-week periods, with each period ending on the selected Week Ending Day (except for the last period, which will end on the last day of the fiscal year). *Note: This may mean that the first and last periods are shorter than the rest.*
   - *Skip for now* – This will create one period for the whole fiscal year. You may manually create additional periods for this year from the Financial Calendar screen at a later time.
5. Select *Next* to continue.

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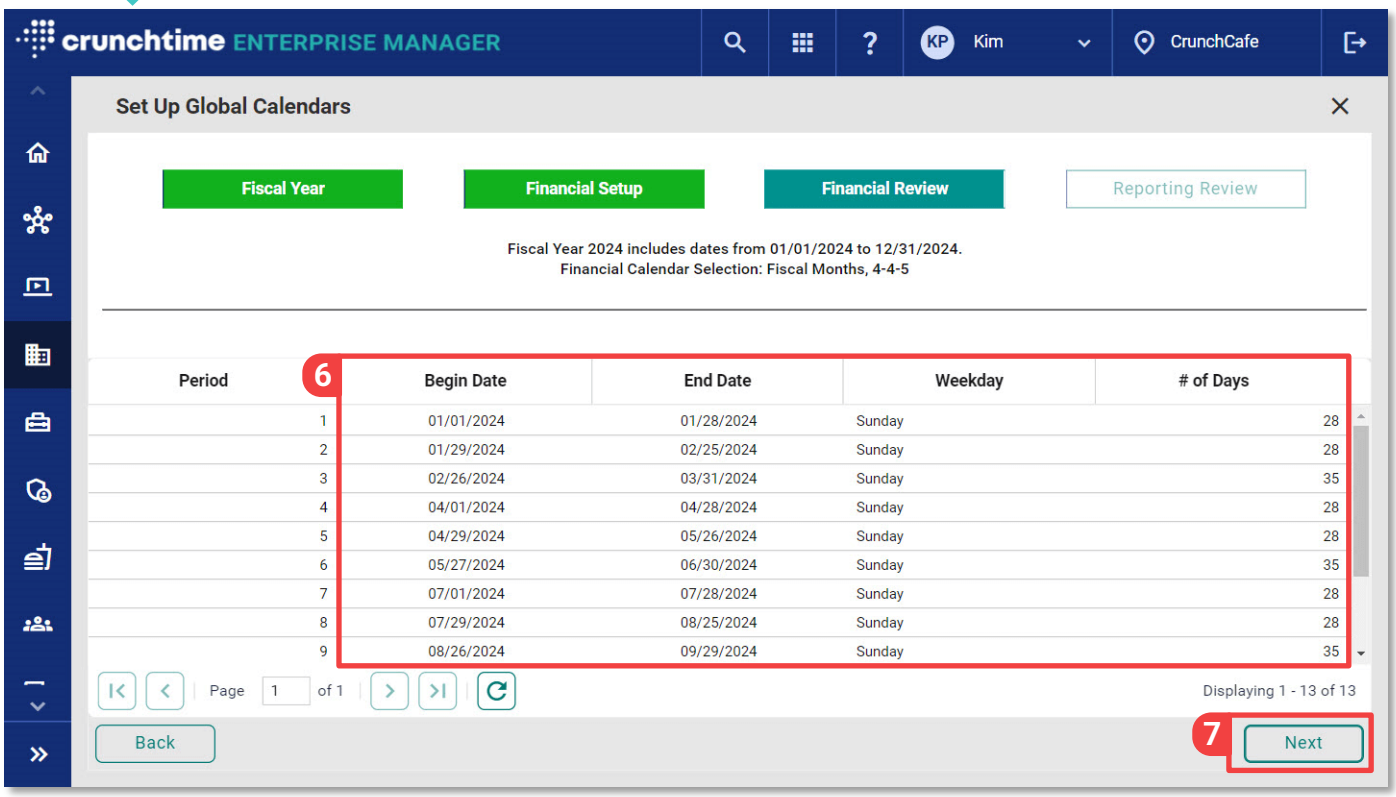
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Financial Calendar

The Calendar Wizard (Continued)

Create the Global Calendars (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Global Calendars



6 Review and confirm the *Begin Date*, *End Date*, *Weekday*, and *# of Days* for each period in the Financial Calendar are correct based on your selection in Step 4.

7 Select *Next* to continue.

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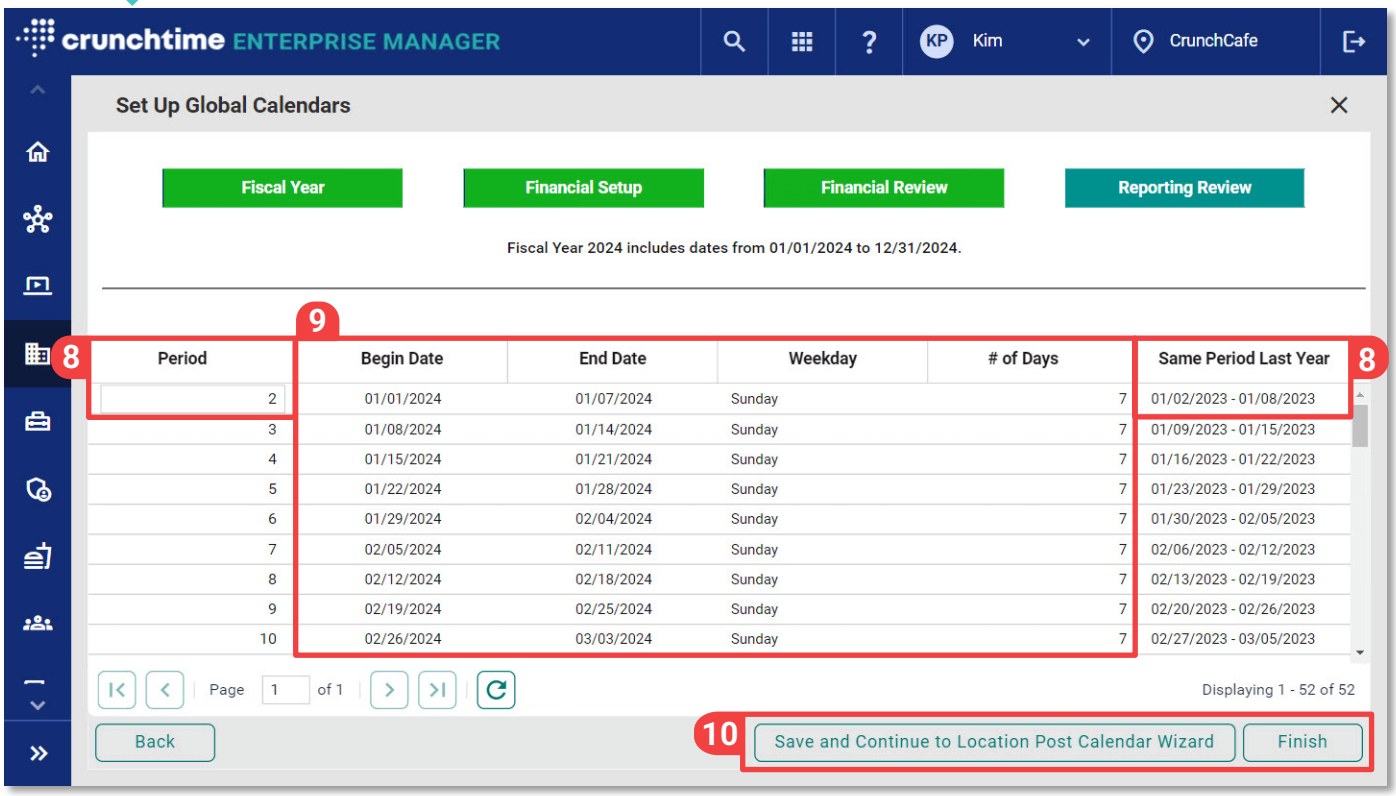
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Financial Calendar

The Calendar Wizard (Continued)

Create the Global Calendars (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Global Calendars



8. If necessary, update the *Period number* to align the new periods with the corresponding periods from last year.
9. Confirm the *Begin Date*, *End Date*, *Weekday*, and *# of Days* for each period is correct.

Note: The *Begin Date* for the first Reporting Period may be the last few days of the previous fiscal year. The *End Date* for the last period will fall on the last Week Ending Day before the end of the fiscal year. The remaining days will be added to the first Reporting Period in the next fiscal year. For each period, the *Week Day* should be the Week Ending Day and the *# of Days* should be 7.

10. When ready, select *Save and Continue to Location Post Calendar Wizard* or, if done for now, select *Finish*.

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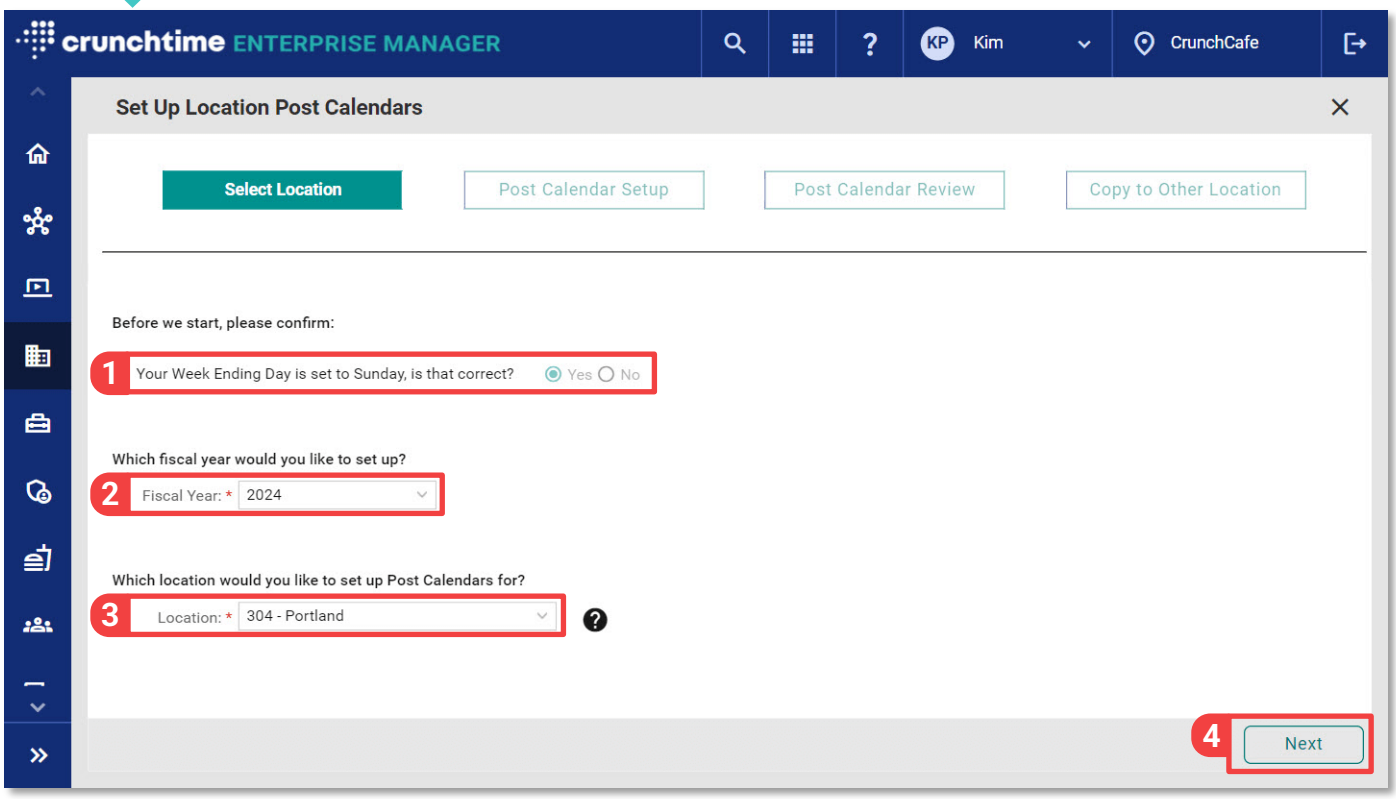
SETUP GUIDE

Financial Calendar

The Calendar Wizard (Continued)

Create Location Post Calendars

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Location Post Calendars



1. Take a moment to confirm your Week Ending Day is correct. Select *Yes* when you're ready to continue. (The selection defaults to *No*, and must be changed to *Yes* to proceed).
2. Select the *Fiscal Year* you would like to set up.
3. Choose the *Location* you are creating Post periods for. This list will include Locations that do not already have a Post Calendar for the seleted fiscal year.

   Concept Note: If a location is linked to one or more Concepts, it will only be available if the current application user is linked to one or more of the same Concepts. If a Location is not linked to any Concepts, it will be available to all users.

Tip: If your company franchises, hover over the (?) icon for a reminder that you can only setup Post Calendars for locations in your Franchise Entity.

4. Select *Next* to continue.

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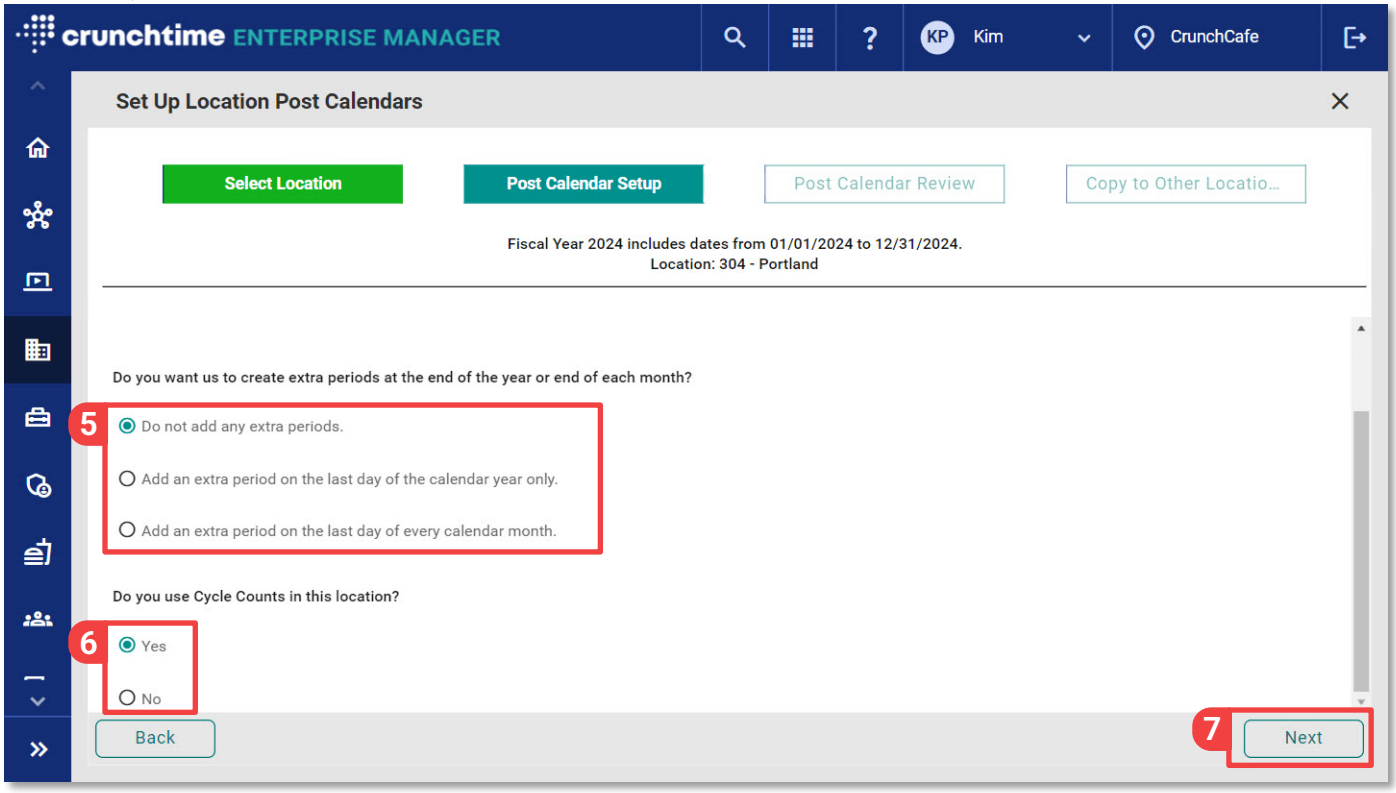
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Financial Calendar

The Calendar Wizard (Continued)

Create Location Post Calendar (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Location Post Calendars



Enterprise Manager will set up Post Calendar records in 'Week' increments that end on your Week Ending Day. Answer the questions in Steps 5 and 6 below to further customize the Post Calendar.

5 Indicate if you would like to add additonal Post periods. Options include:
- *Do not add any extra periods* (Default) – The Post Calendar will be created with only 7-day weekly periods.
- *Add an extra period on the last day of the calendar year only* – The Post Calendar will be created with 7-day weekly periods with one additonal period ending on the last day of the calendar year.
- *Add an extra period on the last day of every calendar month* – The Post Calendar will be created with 7-day weekly periods with one additional period at the end of each month.

6 Indicate if this Location uses Cycle Counts.
- *No* (Default) – If selected, every period on the Post Calendar will require a full count.
- *Yes* – If selected, you will be able to choose the "Inventory Period" for each period where a Cycle Count should be performed.

7 Select *Next* to continue.

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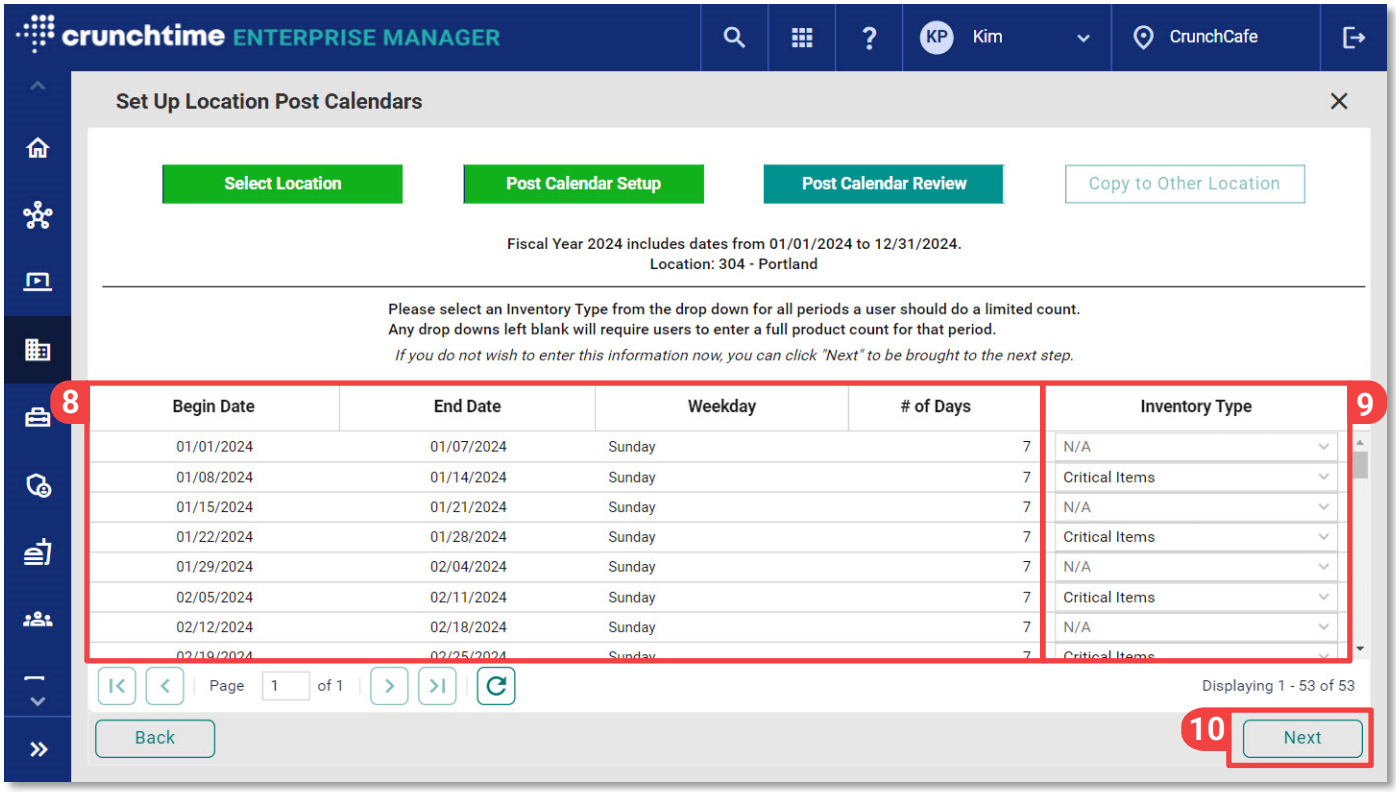
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Financial Calendar

The Calendar Wizard (Continued)

Create Location Post Calendar (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Location Post Calendars



8. Confirm the *Begin Date*, *End Date*, *Weekday*, and *# of Days* are correct for each period.
9. If you selected 'Yes' in Step 6 above, select an *Inventory Type* (User Defined Category) to indicate which products should be counted on the applicable Cycle Count periods.
10. Select *Next* to continue.

Tip: Post Calendars must have periods extending through the entire fiscal year with no gaps. Use the *Post Calendar Missing* task from the Today's Corporate Tasks Dashboard widget to identify any locations that need additional post periods to complete the fiscal year.

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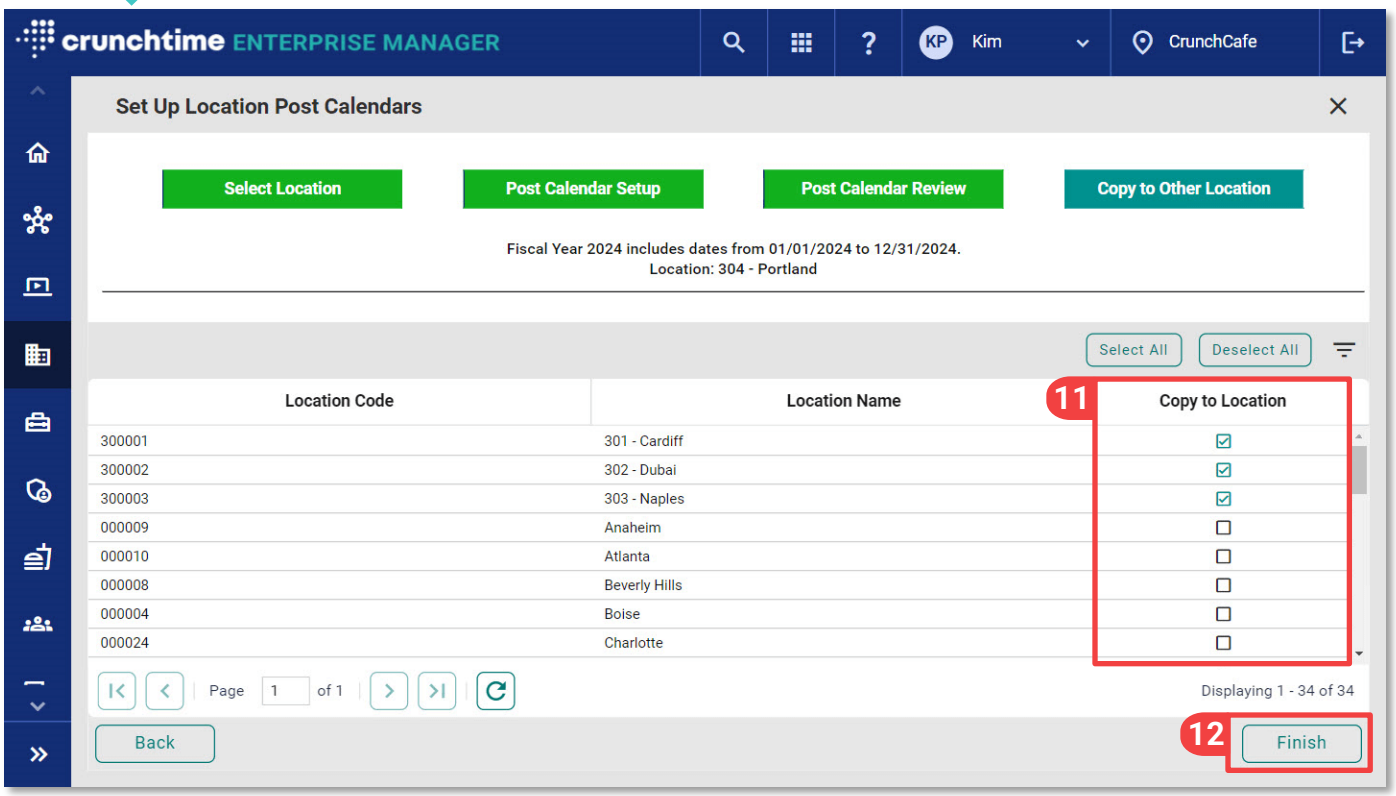
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Financial Calendar

The Calendar Wizard (Continued)

Create Location Post Calendar (Continued)

Enterprise Manager > Corporate: Financial Calendar > Calendar Wizard > Location Post Calendars



Tip: When copying the calendar, you can filter the list of locations by Concept, Hierarchy, or Market. If your company has multiple locations with the same Post Calendar setup, we recommend filtering for a common setting to easily copy the calendar to all similar locations.

11 Check the *Copy to Location* box for each Location that will use this same Post Calendar, or use the Select All button to quickly choose all listed Locations (filters will be respected). If no additional Locations are selected, the Post Calendar will be created for only the original Location selected in Step 3.

12 When ready, select *Finish*. Post Calendars will be created fro all selected Locations.