Wevo GL Analytics

Live Demo Guide

See where every number in your business comes from

Professional Software Ltd

Executive summary

Click any figure and see exactly what sits behind it.

Wevo GL Analytics is management reporting that stays in step with your General Ledger. It sits beside your ledger as a read-only GL analytics layer, keeps its figures minutes behind the ledger, and lets anyone in finance move through the business two ways at once: by organisation and by account.

This live demo lets you try it yourself, in your own web browser, with no installation and no registration. You are signed in automatically as a guest user. The data belongs to a fictitious bank, so you can click anywhere without risk. Open it at https://sandbox.wevo.co.uk.

What you will see in fifteen minutes

- **Any figure explained.** Click a total and the figures beneath it appear. Keep clicking until you reach the lowest level of detail. Each click is typically answered in under a second.
- **Two views of the business at once.** The organisation is on one side and the chart of accounts is on the other. Every figure sits where the two meet.
- **Years, periods and budgets side by side.** Choose what you want to compare and the columns build themselves. There is no report to design and no spreadsheet to assemble.
- **From a question to the answer in a few clicks.** The questions a Chief Executive asks across the table, such as where did that number come from, are answered on the screen.

The problems it solves

Finance teams will recognise every row below. The last column says whether you can try it in this demo.

The problem you know	What Wevo does	In this demo
Which cost centre drove that variance? We will come back to you.	Click through from the total to the cause, in the meeting.	Try it
The month-end pack is a spreadsheet built by hand.	Years, periods and budgets side by side, straight from the ledger.	Try it
We need the same number by cost centre and by account.	One click switches the breakdown between the two structures.	Try it
We are deciding on yesterday's numbers.	Figures that stay minutes behind the General Ledger, not a day.	Beyond the demo
Every reorganisation breaks our comparatives.	Your structure and your data are separate things, so any structure can be applied to any period.	Beyond the demo
We can no longer reproduce what we reported at the time.	Preserve the structure in one click, for under 1 MB, and report the business as it was.	Beyond the demo
Every hierarchy change is an IT ticket.	Finance owns the structure and promotes its own changes.	Beyond the demo

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Safe to put beside your ledger

- Wevo works from file extracts and has no connection to your ledger, so it can sit beside any General Ledger.
- It is a read-only layer. Your General Ledger stays your system of record.
- It runs entirely in your own environment, on your own servers. Your data never leaves your estate.
- It is built on cost centre and profit centre reporting proven in Tier-1 banking.

Numbers worth knowing

Measure	Figure
Drilldown response	Typically under 1 second
Behind the General Ledger	Minutes, not a day
Years side by side	Up to 9
Levels in a hierarchy	Up to 20
Nodes demonstrated	25,000 organisational and 5,000 chart of accounts
Summarised rows calculated and updated	Around 4 million per minute

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A guided tour

Follow these steps in order. Each takes a minute or two.

At a glance

Item	Details
Address	https://sandbox.wevo.co.uk
Sign-in	None. You are signed in automatically as a guest user.
Data	A sample general ledger for a fictitious bank, already summarised and ready to enquire into. Three hierarchies, each six levels deep: 1,631 account nodes, 1,525 division nodes and 3,107 cost centre nodes.
What you need	A current web browser. A laptop or desktop screen gives the best view.
Time	About fifteen minutes for the guided tour.

1. **Start at Hierarchies.** The demo opens on the Hierarchies list. This bank has three hierarchies: CHART OF ACCOUNTS, DIVISIONS and COST CENTRES. Each is a structure over the ledger, six levels deep. Select one to open its tree and move up and down its levels.
2. **Choose a cube.** Select Cubes on the navigation bar. A cube pairs one organisation hierarchy with one chart of accounts hierarchy over the same ledger data. The demo has two cubes: COST CENTRE ANALYSIS, which shows the group's cost centres by chart of accounts, and DIVISION ANALYSIS, which shows its divisions by chart of accounts. Select a cube to open it.
3. **Set the selection.** On the Selection Criteria tab choose what you want to see: the data type, the years, the periods, the calculation, the currency, the scaling and the debit notation (Figure 1). If you are unsure, accept the defaults. Then select View Data. At any time click on Show Selection Criteria to redisplay the selection criteria and change the display accordingly.

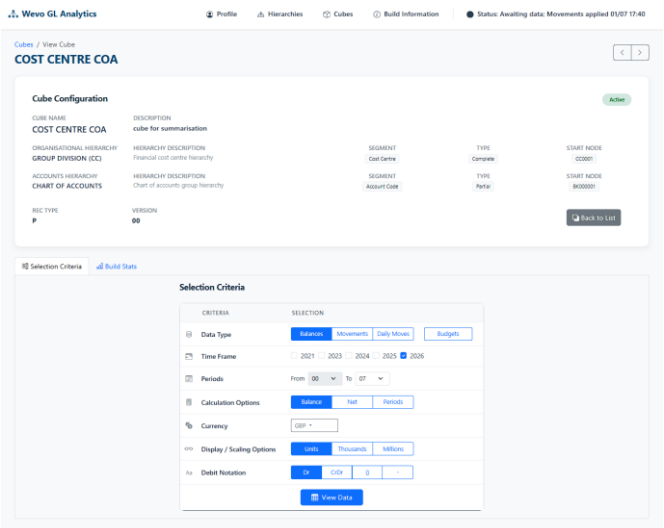


Figure 1 - A cube, with the Selection Criteria tab ready for View Data.

4. **Read the Drilldown screen.** The organisation (blue) is on the left and the chart of accounts (green) is on the right. Each shows the node in focus, with its parent and grandparent above

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it and its children below. The table underneath shows the figures (Figure 2). Each node is shown with its level, for example 200/, and the number after a node name is the number of its children.

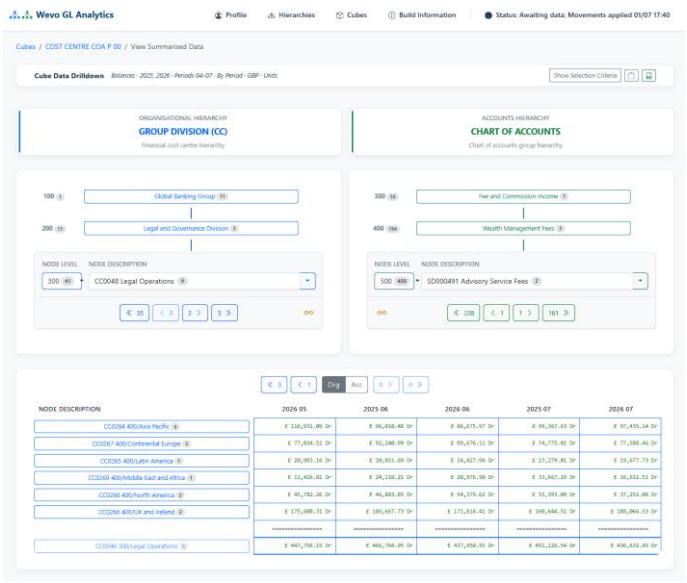


Figure 2 - The Drilldown screen, showing the Org breakdown of the node pair in focus.

5. **Click a node.** Click any node, on either side, to make it the focus (the centre node). That includes the children in the table and the parent and grandparent above. The screen redraws around it, so moving up or down the hierarchy takes one click.
6. **Move left and right.** Under each hierarchy are two pairs of left and right node buttons. The outer buttons (<< and >>) step through the nodes at the same level, in alphabetical order. The inner buttons (< and >) step through the children of the parent of the node in focus. The badge on each button shows how many nodes lie in that direction.
7. **Jump to a level or node.** Use the drop-down boxes under each hierarchy to select a level, and then a node on that level, to go straight to it.
8. **Pivot the breakdown.** The Org and Acc buttons in the centre choose how the table is broken down. The totals are the same for both nodes in focus. What changes is the breakdown: Org lists the children of the organisation node in focus, and Acc lists the children of the account node in focus. One intersection, read two ways with one click (Figure 3).

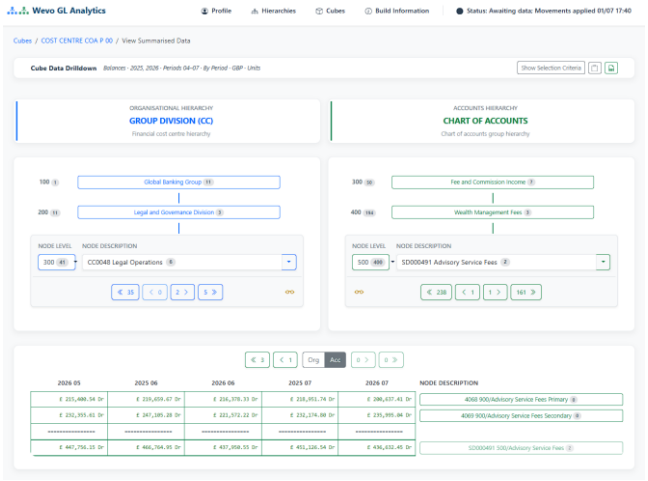


Figure 3 - The same node pair with Acc selected: the breakdown moves to the children of the account node.

9. **Scroll the columns.** When the selection produces more than five columns, use the column buttons either side of Org and Acc to scroll them: the inner pair moves one column at a time and the outer pair moves five at a time.

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10. **Compare years, periods and budgets.** Tick two or more years to see them side by side, and change the periods or the calculation. If the cube holds budgets, select Budgets: every column then has a budget column beside it, and the variance for a figure appears when you hover over it. The next section explains the choices.
11. **Take the figures away.** Select the Export to CSV button to download the breakdown for the node pair in focus. The CSV file will contain all of the columns in the current query, as the display is limited to only showing five columns at a time (Figure 4).

	A	B	C	D	E	F	G	H	I	J
1	Column1	Column2	Column3	Column4	Colum	Column6	Column7	Column8	Column9	Column10
2	Balances · 2025, 2026 · Periods 04–07 · By Period · GBP · Units									
3										
4	Org Node	Org Description	Acc Node	Acc Description		2025 04	2026 04	2025 05	2026 05	2025 06
5	CC0048	900/Legal Operations	4068	Advisory Service Fees Primary		£ 219,332.18	£ 182,295.32	£ 237,552.89	£ 215,400.54	£ 219,659.67
6	CC0048	900/Legal Operations	4069	Advisory Service Fees Secondary		£ 216,072.84	£ 204,582.36	£ 206,718.65	£ 232,355.61	£ 247,105.28
7	CC0048	300/Legal Operations	SD000491	500/Advisory Service Fees	Total	£ 435,405.02	£ 386,877.68	£ 444,271.54	£ 447,756.15	£ 466,764.95
8										
9	Acc Node	Acc Description	Org Node	Org Description		2025 04	2026 04	2025 05	2026 05	2025 06
10	SD000491	400/Advisory Service Fees	CC0264	Asia Pacific		£ 105,733.19	£ 80,463.09	£ 84,062.92	£ 116,931.09	£ 96,010.48
11	SD000491	400/Advisory Service Fees	CC0267	Continental Europe		£ 81,954.04	£ 81,940.42	£ 85,969.61	£ 77,034.52	£ 92,240.99
12	SD000491	400/Advisory Service Fees	CC0265	Latin America		£ 19,048.25	£ 17,170.40	£ 18,937.01	£ 20,983.16	£ 20,851.69
13	SD000491	400/Advisory Service Fees	CC0269	Middle East and Africa		£ 24,603.93	£ 9,493.92	£ 20,912.21	£ 11,416.81	£ 24,110.21
14	SD000491	400/Advisory Service Fees	CC0268	North America		£ 33,076.47	£ 40,419.77	£ 50,198.30	£ 45,782.26	£ 46,883.85
15	SD000491	400/Advisory Service Fees	CC0266	UK and Ireland		£ 170,989.14	£ 157,390.08	£ 184,191.49	£ 175,608.31	£ 186,667.73
16	SD000491	500/Advisory Service Fees	CC0048	300/Legal Operations	Total	£ 435,405.02	£ 386,877.68	£ 444,271.54	£ 447,756.15	£ 466,764.95
17										

Figure 4 - An exported CSV file opened in a spreadsheet, with the Org and Acc breakdowns and their totals.

12. **Try the watchlist.** A pair of gold glasses beside a node pair means it is on the watchlist. In this demo you can add and remove watchlist entries yourself. In a normal installation only administrators can.
13. **Check how current the figures are.** The status indicator at the top right of every page tells you the state of the summarisation and when it last ran.

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How the Drilldown works

The Drilldown is a two hierarchy enquiry. The organisation and the chart of accounts are navigated together, and every figure sits where the two meet. This section explains the controls and the choices behind the screen.

Two hierarchies, one figure

The node in focus on the left (the organisation) and the node in focus on the right (the account) together form the node pair. The figures on the screen are the figures for that pair. Every figure is pre-calculated and stored, so a drill reads a stored answer instead of adding up the ledger, which is why a click is typically answered in under a second. The lowest level of detail is the intersection of a segment value and an account.

Org or Acc: the same totals, two breakdowns

The Org and Acc buttons never change the figure for the node pair in focus. They change how it is broken down.

Button	The table lists	Each row shows	The total line
Org	The children of the organisation node in focus	That child against the account node in focus	The node pair in focus
Acc	The children of the account node in focus	The organisation node in focus against that child	The same figure

You can answer which cost centres and which accounts for the same figure without leaving the screen.

Moving around

Control	What it does
Click a node	Makes it the focus on its side. It works on the children in the table and on the parent and grandparent above.
Outer buttons << >>	Step through the nodes at the same level, in alphabetical order.
Inner buttons < >	Step through the children of the parent of the node in focus.
Level drop-down	Choose any level of the hierarchy.
Node drop-down	Choose any node at that level.
Badges	The number of nodes lying in that direction. After a node name, the number of its children.

Each side has its own controls, so you can hold one node still while you move the other. Every navigation step keeps the whole selection in place: both hierarchies, the years, the periods, the currency and the notation.

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Choosing what each column shows

The calculation options decide how each column is built from the periods of a year. In these examples period 00 is the opening balance and the periods follow from 01.

Calculation	What the column shows	Example
Balance	The opening balance plus every period up to the last period you choose.	Balance to period 03 is the opening balance plus period 01, period 02 and period 03. One column.
Net	The total of the periods from the first period to the last period you choose.	Net for periods 02 to 05 is period 02 plus period 03 plus period 04 plus period 05. One column.
Periods	One column for each period from the first period to the last.	Periods 05 to 07 shows three columns: period 05, period 06 and period 07.

Each calculation applies to the data type you choose. Balances are the ledger balances. Movements accumulate from a cleardown that your organisation schedules, for example every Monday at 6am for the week to date. Daily Moves show what has hit the ledger today.

Years and budgets side by side

Whatever you choose is repeated for every year you tick, side by side, up to nine years. If you select Budgets, every column that is generated gets a budget column beside it to compare against, and the variance for a figure appears when you hover. The number of columns depends on your choices.

Selection	Columns
Balance to period 07 for 2026	1
Balance to period 07 for 2025 and 2026	2
Balance to period 07 for 2026, with budgets	2
Periods 05 to 07 for 2025 and 2026	6
Periods 05 to 07 for 2025 and 2026, with budgets	12
Nine years, every period of each, with budgets	306, the theoretical maximum

Five columns are shown at a time. Scroll the rest into view with the column buttons either side of Org and Acc: the inner pair moves one column at a time and the outer pair moves five at a time. The selection stays in place as you drill, so you can follow one comparison down through the whole business.

Notation, scaling and currency

Show amounts in units, thousands or millions. Choose the debit notation: Dr, CrDr, brackets or a trailing minus sign. Choose the currency from those held in the data: the base currency (consolidated) or the source currency (original).

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Problems the demo solves in minutes

Each of these is a problem finance teams live with, and each one can be answered in front of you in the demo. The last line of each tells you what to click.

"Which cost centre drove that variance? We will come back to you."

Today. A variance appears in the pack. Finding the cause means exporting to a spreadsheet, filtering by hand or raising a ticket with the reporting team, and the answer arrives after the meeting.

With Wevo. Click the figure. The cost centres beneath it appear, then the ones beneath those, down to the lowest level of detail. The answer is on the screen while the question is still on the table.

Try it. Open COST CENTRE ANALYSIS, select View Data, and click your way down from the top of the group to a single cost centre. Count the clicks and watch the clock.

"I need the same number by cost centre and by account."

Today. Two requests, two reports, and two versions of the truth to reconcile.

With Wevo. Org and Acc show the same totals for the node pair in focus. One breaks the figure down by the organisation and the other by the account. It takes one click, and the figure never changes.

Try it. Choose a node pair, select Org, then Acc, and compare the total lines.

"The month-end pack is a spreadsheet built by hand."

Today. Each month the pack is assembled from extracts: this year here, last year there, budget on another tab. Comparisons are built by formula, and any change to the structure means rebuilding the formulas.

With Wevo. Tick the years, choose Balance, Net or Periods, and the columns build themselves, side by side, up to nine years at once. Every column can have a budget column beside it.

Try it. Select Show Selection Criteria, tick 2025 and 2026, choose Periods, set periods 05 to 07 and select View Data. Six columns appear. Switch the calculation to Balance and watch the display rebuild.

"How are we doing against budget?"

Today. Actuals live in the ledger and budgets in a spreadsheet, and the variance is somebody's afternoon.

With Wevo. Budgets are summarised through the same hierarchies as the actuals, so the comparison is like for like at every node. Select Budgets and every column gets a budget column beside it. Hover over a figure to see its variance.

Try it. If the cube holds budgets, select Budgets alongside Balances, then drill from the group total to a single cost centre and watch the budget move with you.

"Our chart of accounts is not how management thinks."

Today. The ledger's accounts are set up for posting and statutory accounts, not for the questions managers ask. Regrouping them means a mapping exercise, usually in a spreadsheet.

With Wevo. The account hierarchy groups accounts the way management reads them, up to 20 levels deep, and every figure rolls up through it. Finance defines the grouping.

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Try it. Open the CHART OF ACCOUNTS hierarchy, then watch the accounts side of the Drilldown as you move from a top-level group down to individual account codes.

"Different audiences want different views of the same ledger."

Today. The board wants divisions and the cost centre owners want cost centres, and each view is a separate report with its own logic.

With Wevo. One ledger can be read through more than one structure. The demo has two cubes over the same chart of accounts: one by cost centre and one by division.

Try it. Open COST CENTRE ANALYSIS and DIVISION ANALYSIS in turn, pick the same account group in each, and compare how the same ledger reads through two structures.

"What has hit the ledger this week, or today?"

Today. In close week a late journal is found after the pack has gone out, because looking means querying the ledger again.

With Wevo. Movements accumulate from a cleardown that you schedule, for example every Monday at 6am, so the screen shows the week to date. Daily Moves show what has posted today. Neither needs a fresh query of the ledger.

Try it. If the cube holds movements, choose Movements or Daily Moves on the Selection Criteria tab and compare them with Balances.

"I just need it in a spreadsheet."

Today. Somebody keys, copies or exports the figures and then reformats them.

With Wevo. Export to CSV downloads the breakdown for both nodes of the pair in focus, with the selection recorded on the first line and the totals at the foot of each block. It opens straight into a spreadsheet (Figure 4).

Try it. Select Export to CSV and open the file.

"Is this number current?"

Today. Overnight batches mean decisions on yesterday's numbers, and nobody is sure which version they are looking at.

With Wevo. Wevo keeps its figures minutes behind the General Ledger, and every screen carries a status indicator that says what state the summarisation is in and when it last ran.

Try it. Look at the status indicator at the top right of any page.

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Beyond the demo

Everything in this section is part of Wevo but is not in the live demo, which shows the enquiry screens only. We are glad to walk you through any of it. Contact details are at the end.

"We reorganised and lost our comparatives."

Today. Every reorganisation rewrites the org chart, and with most tools it also rewrites your reporting. Comparatives are restated, remapped or footnoted as not like for like.

With Wevo. Your structure and your data are separate things. The hierarchy is a lens over the ledger, not a shape baked into it, so any structure can be applied to any period. Read prior years through today's structure for an instant like-for-like comparison, with no restatement.

Beyond the demo. Ask us to show you the same year read through two different structures.

"We can no longer reproduce what we reported at the time."

Today. The auditors, a regulator or the board ask for last year's numbers under last year's structure, and the business has been reorganised twice since. Once a structure has been changed, the old arrangement is usually gone and the figures cannot be reproduced.

With Wevo. Press Preserve Structure on a cube and the exact organisation and account structure in force at that moment is kept, in one click, for under 1 MB on an enterprise group. A preserved structure holds no data and uses no processing until it is wanted. It cannot be amended, only deleted, so it stands as evidence of what was genuinely in force. When you want the old view, activate the preserved cube and the years you need. The figures are built at the next full build, you use them, and you then inactivate the cube. You report the business as it was.

Beyond the demo. Ask us to walk you through Preserve Structure.

The one rule is to preserve before the change. Preserve monthly, or at the least at each year end, and immediately before every merger, acquisition, disposal, reorganisation or chart of accounts rationalisation. Once a restructured hierarchy has been promoted, the previous arrangement can no longer be copied. Preserving costs next to nothing. Not having preserved is a problem that cannot be fixed afterwards.

Nobody can tell us what the restructure did to the numbers. Report the same year through the old structure and the new structure side by side. The difference is the effect of the restructure: calculated, not estimated.

"Every hierarchy change is an IT ticket."

Today. Moving a cost centre or regrouping accounts waits in the IT queue, and the reorganisation is over before the reports catch up.

With Wevo. Finance owns the structure. Any hierarchy can be edited freely. When it is ready, one button promotes and locks it, and it takes effect at the next full build. Complex reorganisations can be prepared over days or weeks, rehearsed in a development instance and deployed in one controlled build.

Beyond the demo. Ask us to show you a hierarchy being edited and promoted.

"Late and prior-year journals never reach the reporting."

Today. A late journal or an audit adjustment against a prior year is posted to the ledger, but the reporting copy of that year has already been closed off, so history quietly drifts away from the ledger.

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With Wevo. Every year allocated to Wevo stays synchronised with the General Ledger. A late journal or an audit correction against a prior year appears like any other posting, with no reload and no reconciliation.

Beyond the demo. Ask us to show you a prior-year posting arriving.

"Report recipients should not need a login."

Today. Passive recipients are sent a spreadsheet, or given access to a reporting tool they use twice a month.

With Wevo. Authorised users receive a report request form by email, choose their parameters in the browser and send it. The finished management accounts, such as a trial balance or a profit and loss, come back by email, usually within minutes, as TXT, PDF, HTML or CSV. The recipient needs no Wevo login.

Beyond the demo. Ask us to send you a report.

"We only ever see today. There is no trend history for the figures that matter."

Today. The ledger gives you the position now, and reconstructing how a key figure evolved means digging through old reports.

With Wevo. The node pair watchlist records the movements and balances of chosen pairs of organisation and account nodes each time they are recalculated, in practice every 15 or 30 minutes, and builds a time-stamped history with no ongoing effort. The data is AI-ready and can be exported for trend analysis.

Beyond the demo. The gold glasses on the Drilldown screen mark the pairs being watched. Ask us to show you the history behind one.

"Our security and audit teams need to be comfortable."

Today. Reporting tools that sit outside the estate raise questions about where the data goes and who can see it.

With Wevo. Your own sign-in tells Wevo who the user is, and Wevo applies that user's security profile, checked in the database on every move. Changes made through the maintenance screens are logged with the user's name and the time. Wevo runs entirely in your own environment, and its own code contains no dynamic SQL in any production procedure, function or trigger.

Beyond the demo. Ask us for the security and audit overview.

Good to know

- The demo is shared. Other visitors use the same sample data and the same guest user, so a watchlist entry you add may be removed by someone else.
- The demo is not private, and it holds sample data only. Please do not enter anything confidential.
- If a page says there are too many requests, wait a few seconds and try again.
- If you see an error message with a reference, quote the reference when you contact us.
- The demo may change, or be unavailable for short periods, without notice.

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Glossary

Term	Meaning
Hierarchy	A structure over the ledger, such as the organisation or the chart of accounts, arranged in levels.
Node	One point in a hierarchy, such as a division, a cost centre or a group of accounts. The number after a node name is the number of its children.
Level	A row of nodes at the same depth in a hierarchy.
Cube	A pairing of an organisation hierarchy and a chart of accounts hierarchy over the ledger data, summarised ready for enquiry.
Node pair	One organisation node and one account node taken together. The figures on the Drilldown screen are for the node pair in focus.
Drilldown	Moving from a consolidated figure to the detail beneath it by selecting a child node.
Breakdown	The children of the node in focus, listed with their figures. Org breaks down by organisation and Acc by account.
Watchlist	A list of node pairs marked for monitoring.

Next steps

Tell us how you report today and we will show you how Wevo handles it.

If the demo raised any questions, or you would like to see Wevo on your own ledger, contact info@wevo.co.uk. To read more about the product, visit wevo.co.uk.

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