






- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers

Select Department

Revenue by Account ⓘ ▾ **+ Add Driver**

<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
...	<input type="checkbox"/> Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-




-  PLAN ACTIVE
- Budget** 
- 
-  Revenue
-  COGS

Share  








Select Department

Balance Sheet - Assets     

Account	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
Assets	\$ 11,713	\$ 12,107	\$ 15,159	\$ 20,074	\$ 6,094	\$ 165,788	\$ 342,306	\$ 528,269	\$ 734,695	\$ 950,403	\$ 1,172,553	\$ 1,411,347
Current Assets	\$ 9,974	\$ 10,367	\$ 13,420	\$ 18,335	\$ 4,355	\$ 164,049	\$ 340,567	\$ 526,530	\$ 732,956	\$ 948,664	\$ 1,170,813	\$ 1,409,608
Bank Accounts	\$ 9,974	\$ 10,367	\$ 10,670	\$ 9,482	\$ 3,544	\$ 164,049	\$ 340,567	\$ 526,530	\$ 732,956	\$ 948,664	\$ 1,170,813	\$ 1,409,608
Other Current Assets	-	-	\$ 2,750	\$ 8,853	\$ 811	-	-	-	-	-	-	-
Fixed Assets	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739
... Office Equipment	-	-	-	-	\$ 2,569	\$ 2,569	\$ 2,569	\$ 2,569	\$ 2,569	\$ 2,569	\$ 2,569	\$ 2,569
... Less Accumulated Depreciation	-	-	-	-	-	-	-	-	-	-	-	-
... Computer Equipment	\$ 1,739	\$ 1,739	\$ 1,739	\$ 1,739	\$ -830	\$ -830	\$ -830	\$ -830	\$ -830	\$ -830	\$ -830	\$ -830
... Less Accumulated Depreciation	-	-	-	-	-	-	-	-	-	-	-	-
... Unmapped	-	-	-	-	-	-	-	-	-	-	-	-
Other Assets	-	-	-	-	-	-	-	-	-	-	-	-
... Unmapped	-	-	-	-	-	-	-	-	-	-	-	-




-  PLAN ACTIVE
- Budget** 
- 
-  Revenue
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Share  

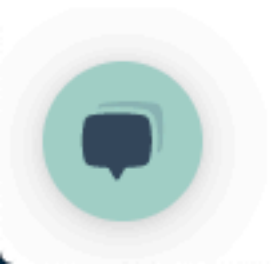


Select Department

COGS     

Account		Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-
Revenue		Unassigned	-	-	-	-	-	\$ 223,118	\$ 232,451	\$ 241,797	\$ 262,759	\$ 283,707	\$
...	Sales	Unassigned	-	-	-	-	-	\$ 233,565	\$ 242,898	\$ 252,243	\$ 271,706	\$ 292,654	\$
...	Other Revenue	Unassigned	-	-	-	-	-	\$ -10,447	\$ -10,447	\$ -10,447	\$ -8,947	\$ -8,947	\$
...	Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
...	Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS		Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
...	Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$		Unassigned	-	-	-	-	-	\$ 221,884	\$ 232,451	\$ 241,797	\$ 262,759	\$ 283,707	\$
Gross Margin %		Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



Select Department

Revenue By Account **EXIT FULLSCREEN** Add Driver

<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20	Dec
...	<input type="checkbox"/> Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-	-





PLAN ACTIVE
Budget ▾

Share ▾



Select Department
Hint Text ▾

Revenue by Account ⓘ ▾ **+ Add Driver**

<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
...	<input type="checkbox"/> Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-



Select Department

Revenue by Account **+ Add Driver**

<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
...	<input type="checkbox"/> Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-

+ Add Subitem

+ Add Driver



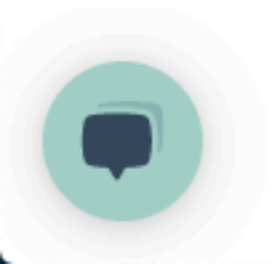
- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers

Select Department
Hint Text ▾

Revenue by Account ▾ 📊 🗨️ 🔄 ⋮ ⊕ Add Driver

<input type="checkbox"/>	Account		Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
⋮ <input type="checkbox"/>	Revenue	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income (38)	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income (37)	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income (36)	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income (35)	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income (34)	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income (33)	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Billable Expense Income	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Sales	Unassign	-	-	-	-	-	-	-	-	-
⋮ <input type="checkbox"/>	Uncategorized Income	Unassign	-	-	-	-	-	-	-	-	-

- > Expand
- > Expand All
- < Collapse
- < Collapse All
- ✕ Reset Expansion
- 🚫 Hide Rows with Zeroes
- 🚫 Hide Rows without Drivers
- 🔗 Enable grid sync
- 📄 Export Excel



- Revenue**
- COGS**
- Staffing**
- OpEx**
- Other**
- Assets**
- Liabilities**
- Equity**
- Custom**
- Assumptions**
- Drivers**

Select Department

Revenue by Account Add Driver Bulk Action 1 Bulk Action 2

<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
...	<input type="checkbox"/> Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input checked="" type="checkbox"/> Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input checked="" type="checkbox"/> Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-





PLAN ACTIVE
Budget ▾

Manage Plans ⓘ

Active: 2 of 3 ⓘ Plan of Record (PoR): 1 ⓘ

PoR	Name	Actuals Period	Forecast Period	Description	Plan Details
...	Budget	June 2020 - July 2020	Aug 2020 - July 2023	Budget	View Details
🔒	Budget	June 2020 - July 2020	Aug 2020 - July 2023	Budget	View Details

+ Add New Plan

Archived: (0) ⓘ
There are no Archived Plans

SAVE Cancel

Assumptions

Assumptions	Category	Value	Unit	Start Date	End Date

Drivers



Task List Progress
Plan Name: Joe Perry
View: All | Completed | In Progress

+ Assign Task

Module Name

Department Name

Jan 05, 2021
Assigned to: Jim Morrison, Robby Kreiger
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.

Status: In Progress



Jan 05, 2021
Assigned to: Jim Morrison, Robby Kreiger
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.

Status: Completed ✓



Module Name

Department Name

Jan 05, 2021
Assigned to: Jim Morrison, Robby Kreiger
Lorem ipsum dolor sit amet, consectetur adipiscing elit,

Share ▾

Aug-20	Sep-20	Oct-20
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-
-	-	-



- Revenue**
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers

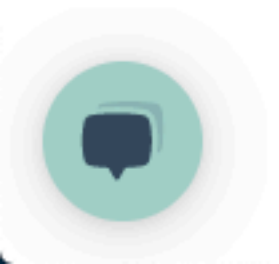
Select Department

Revenue by Account ▾ 📊 🗨️ 🔄 🗨️ ⓕ Add Driver

<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
...	<input type="checkbox"/> Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-

SAVE CHANGES

Cancel



- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers

Select Department





 ▾

Revenue by Account ▾ **+** Add Driver

ACTUALS | FORECAST

	<input type="checkbox"/>	Account	Department	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
...	<input type="checkbox"/>	Revenue	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income (38)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income (37)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income (36)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income (35)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income (34)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income (33)	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Billable Expense Income	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Sales	Unassigned	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/>	Uncategorized Income	Unassigned	-	-	-	-	-	-	-	-	-	-



PLAN ACTIVE
Budget ▾

 Share
 


Select Department

Hint Text ▾

Revenue by Account ⓘ ▾ ...     **+ Add Driver**

				ACTUALS		FORECAST								
<input type="checkbox"/>	Account	Department		Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20	Nov-20
...	<input type="checkbox"/> Revenue	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (38)	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (37)	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (36)	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (35)	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (34)	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income (33)	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Billable Expense Income	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Sales	Unassigned		-	-	-	-	-	-	-	-	-	-	-
...	<input type="checkbox"/> Uncategorized Income	Unassigned		-	-	-	-	-	-	-	-	-	-	-





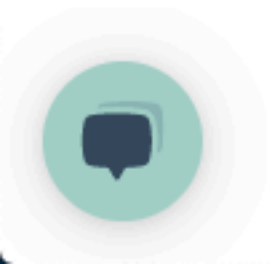
PLAN ACTIVE
Budget ▾

Share ▾

- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers



- Revenue** >
- COGS** ▾
There are no rows to display
 Add Driver
- OPEX** ▾
There are no rows to display
 Add Driver
- Other Income & Expenses** ▾
There are no rows to display
 Add Driver
- Balance Sheet** ▾
There are no rows to display
 Add Driver
- CapEx Assets** ▾
There are no rows to display
 Add Assets
- CapEx** ⓘ ▾
There are no rows to display
 Add Drivers
- Allocations** ⓘ ▾
There are no rows to display
 Add Drivers





Don't see the system you need? [Contact Us](#)

Status

Accounting		Workforce	Sales		Other
Chart of Account Last Import: N/A	Trial Balances Last Import: N/A	Staff Last Import: N/A	Products Last Import: N/A	Customers Last Import: N/A	Custom Last Import: N/A

Actuals

Accounting

Import Your Data

CONNECT	CONNECT	CONNECT
----------------	----------------	----------------

Workforce

Import Your Data

CONNECT	CONNECT	CONNECT
Excel Template Help Center IMPORT		

Other

Import Your Data

Google Sheets CONNECT	Excel IMPORT
-------------------------------------	----------------------------

Sales

Import Your Data

Sales IMPORT	Customers IMPORT
----------------------------	--------------------------------



Don't see the system you need? [Contact Us](#)

Status

Accounting		Workforce	Sales		Custom		
Company: Company Name goes here and will word wrap.	Chart of Account Last Import: Oct 27, 2020 9:43:30 am	Staff Last Import: 27-Oct-2020	Trial Balances Last Import: Oct 27, 2020 9:43:30 am	Date Range: Oct 28, 2020 - Jan 01, 2020 IMPORT	Products Last Import: N/A	Customers Last Import: N/A	Custom Last Import: N/A

Actuals

Accounting ⓘ

Import Your Data

[IMPORT](#)

Workforce ⓘ

Import Your Data

[CONNECT](#)

[CONNECT](#)

[CONNECT](#)

Excel

[Template](#)

[Help Center](#)

[IMPORT](#)

Custom ⓘ

Import Your Data

Google Sheets

[CONNECT](#)

Excel

[IMPORT](#)

Sales ⓘ

Import Your Data

Sales

[IMPORT](#)

Customers

[IMPORT](#)



Don't see the system you need? [Contact Us](#)

Status

Accounting				Workforce 190	Sales		Custom 190
✓ Company: Company Name goes here and will word wrap.	✓ Chart of Account Last Import: Oct 27, 2020 9:43:30 am	✓ Trial Balances Last Import: Oct 27, 2020 9:43:30 am	Date Range: Oct 28, 2020 - Jan 01, 2020 IMPORT	✓ Staff Last Import: 27-Oct-2020	📄 Products Last Import: N/A	📄 Customers Last Import: N/A	📄 Custom Last Import: N/A

Actuals

▾ Accounting ⓘ

Import Your Data

[IMPORT](#)

Workforce ⓘ

Import Your Data

[CONNECT](#)

[CONNECT](#)

[CONNECT](#)

Excel [Template](#) [Help Center](#) [IMPORT](#)

Custom ⓘ

Import Your Data

Google Sheets [CONNECT](#)

Excel [IMPORT](#)

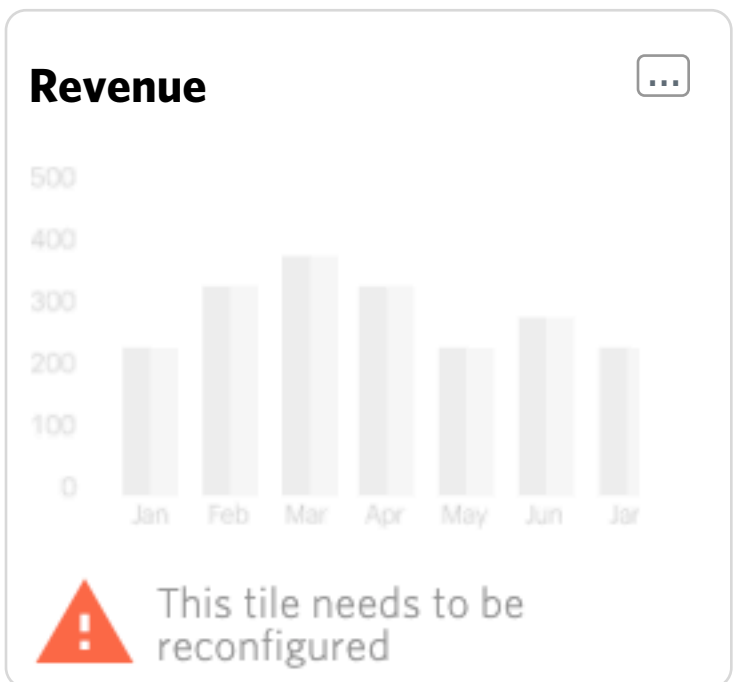
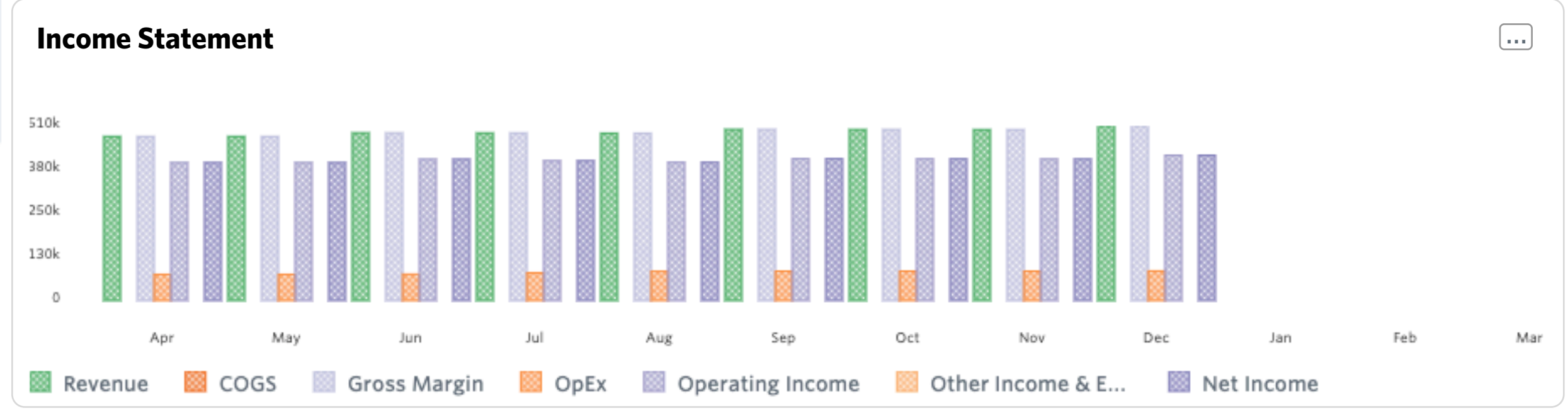
Sales

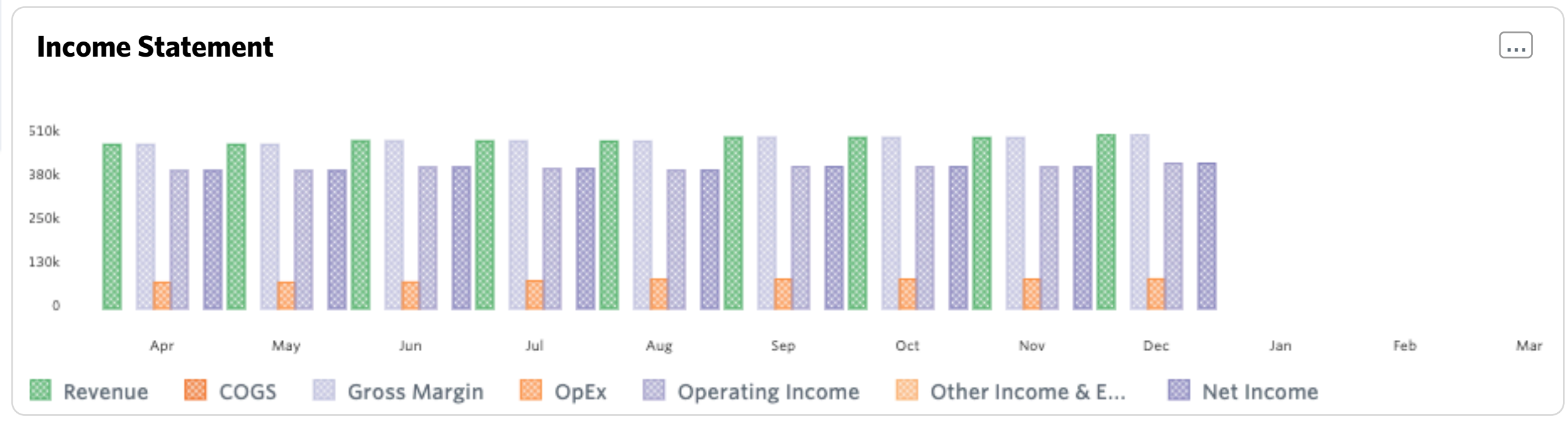
Want to bring in your Products & Customers booking to Actuals?

Import from

- Salesforce
- Braintree
- Stripe
- Excel files
- Recurly
- Google Sheets

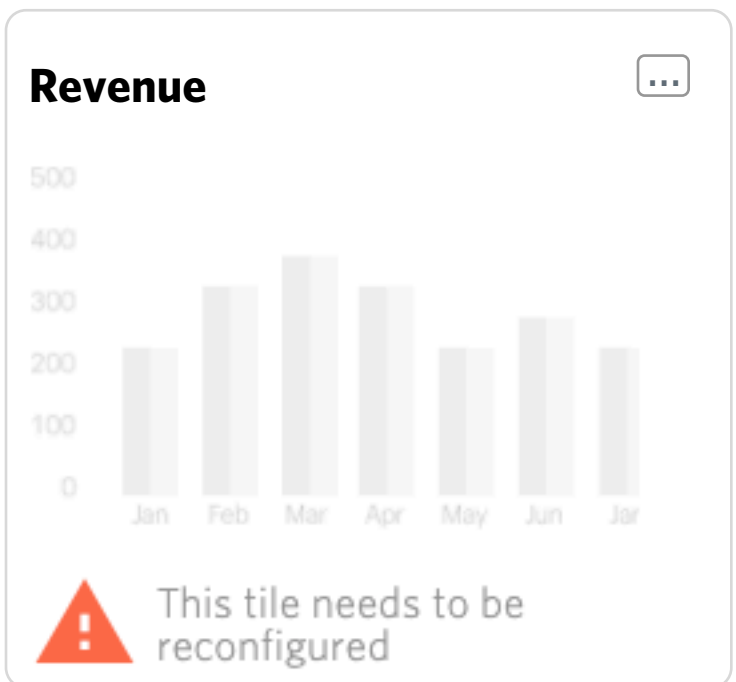
[UPGRADE](#)





- ^ Add New
- ☐+ New Tile
- ☐+ New Text Tile
- ☐+ Income Statement
- ☐+ Balance Sheet

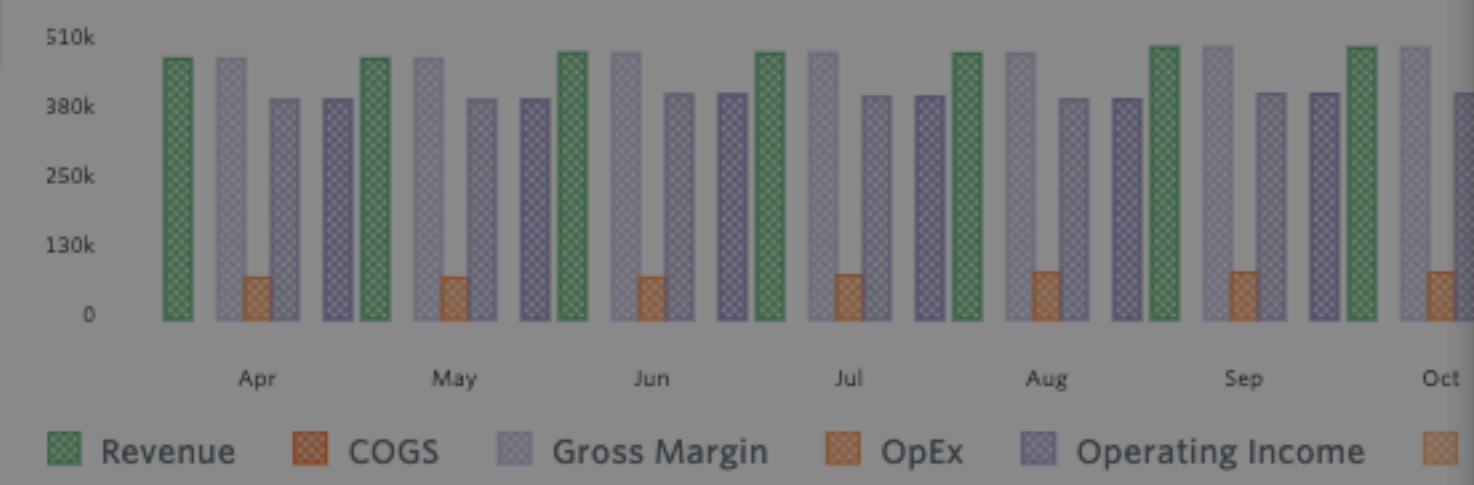
Print Preview



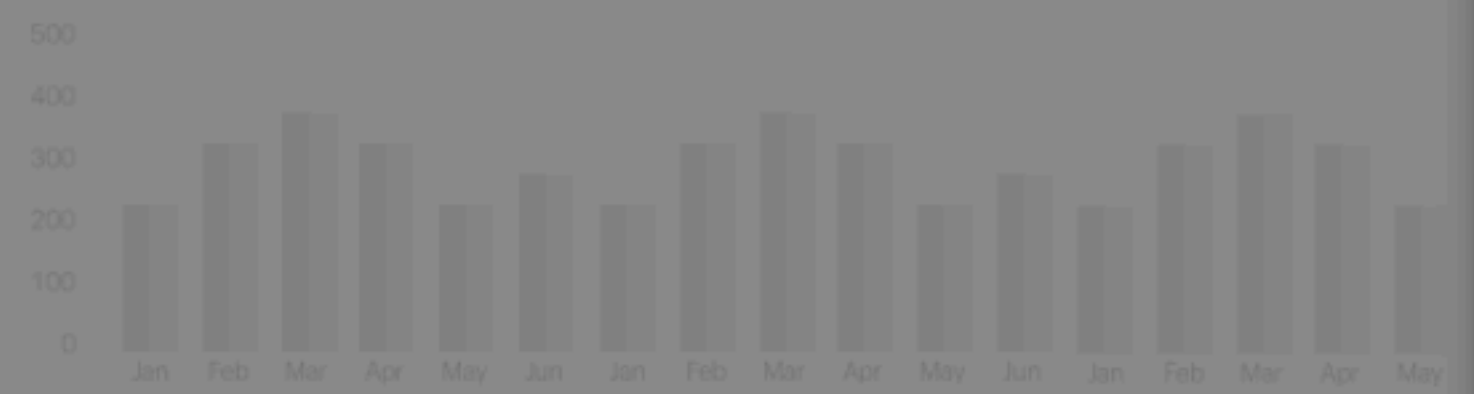


DASHBOARD High Level

Income Statement

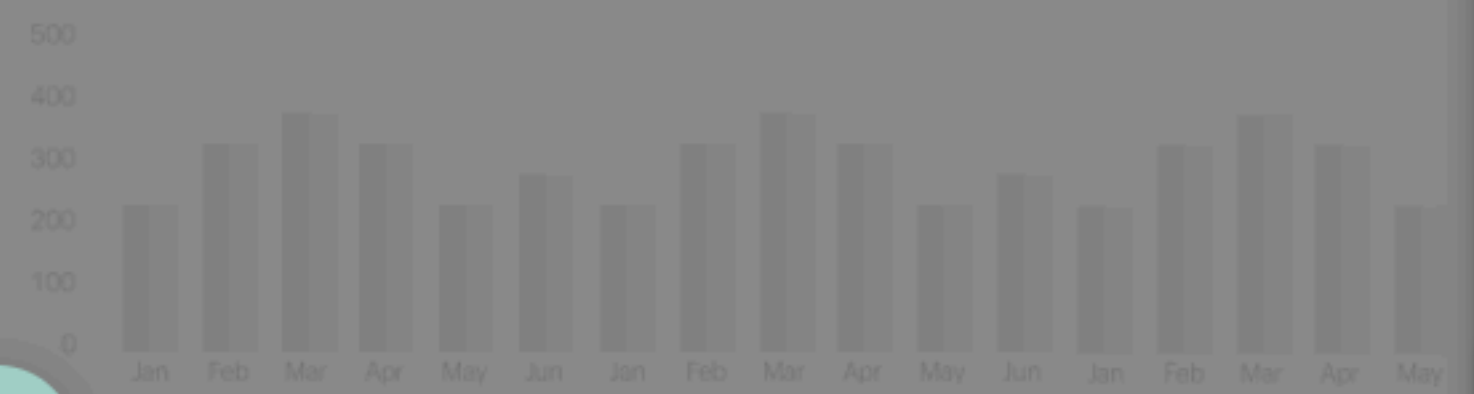


Income Statement



This tile needs to be reconfigured

Balance Sheet



This tile needs to be reconfigured

TILE NAME ✕

What would you like to call this tile?

SERIES

IS · Revenue \$ · All · All

SOURCE **COMPARED TO** **PERIODICITY** **RANGE**

Actuals None Monthly Trailing 6 Months

TILE TYPE

Bar Table Summary Matrix

PREVIEW

Revenue

Apr May Jun Jul Aug Sep

■ Actuals

DISPLAY **GROUP BY** **SHOW ACTUALS UNTIL**

Subtotal Account Max

ZERO ROWS FORMATTING

Hide Zeroes

DATA

	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20
Sales	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other Revenue						

SAVE
Cancel

Share

Add New

Print Preview

Getting Started

Set Up (0/3) Dashboard (0/2) Forecasting

Import Accounting

Import Accounting

System Set Up

Importing your actual accounting data enables Jirav to create realistic metrics dashboards and reports. It also helps you to forecast and plan based on real data. This is a mandatory step before you can start using Jirav.

Import Staffing

Import from

QuickBooks

IMPORT

Video Help (QuickBooks)

Don't see the system you need? Contact Us

- Add New
- New Tile
- New Text Tile
- Income Statement
- Balance Sheet

Print Preview

Income Statement



Income Statement



This tile needs to be reconfigured

Balance Sheet



This tile needs to be reconfigured

Revenue



This tile needs to be reconfigured



Getting Started

Set Up (1/3) Dashboard (0/2) Forecasting

- Import Accounting
- System Set Up**
- Import Staffing

System Set Up

Company Set Up
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Video Help

SET UP COMPANY

Department Mapping
 Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Video Help

MAP DEPARTMENTS

Income Statement



Income Statement



This tile needs to be reconfigured

Balance Sheet



This tile needs to be reconfigured

Revenue



This tile needs to be reconfigured

Add New

Print Preview

Getting Started

Set Up (0/3) Dashboard (0/2) Forecasting

Import Accounting

System Set Up

Import Staffing

Import Staffing

Importing your staffing information enables you to link accounting and staffing data to create realistic, headcount based plans in Jirav. This is an optional step, but we highly recommend it.

Import from

Gusto

IMPORT

Video Help (Gusto)

Don't see the system you need? Contact Us

Income Statement



Income Statement



This tile needs to be reconfigured

Balance Sheet



This tile needs to be reconfigured

Revenue



This tile needs to be reconfigured

Getting Started

Set Up (0/3) Dashboard (0/2) Forecasting

- Import Accounting
- System Set Up
- Import Staffing

Import Staffing

Importing your staffing information enables you to link accounting and staffing data to create realistic, headcount based plans in Jirav. This is an optional step, but we highly recommend it.

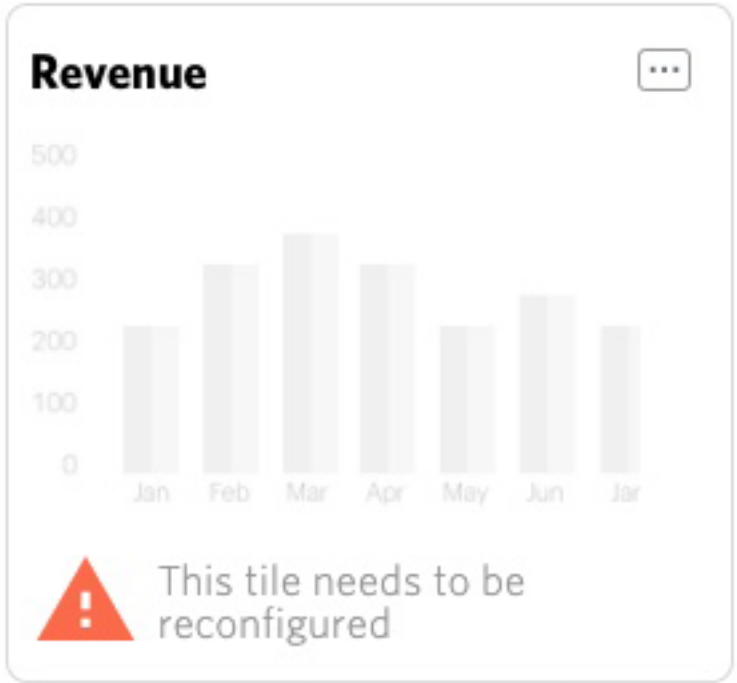
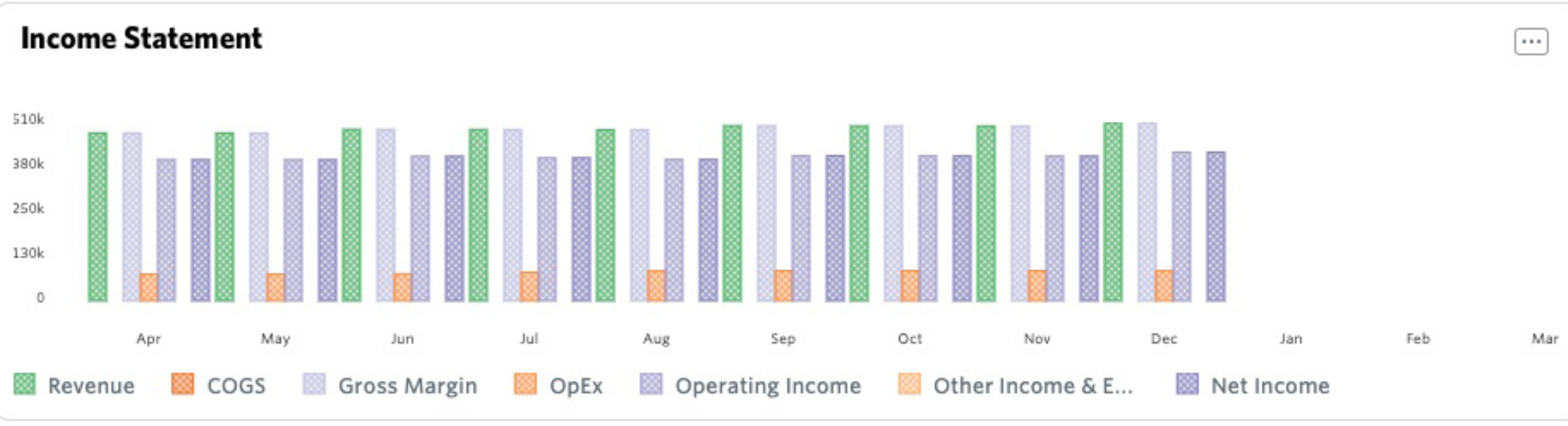
Import from

Excel **IMPORT**

Video Help (Excel)

Download Excel Template | Help Center

Don't see the system you need? [Contact Us](#)



Getting Started

Set Up (0/3) **Dashboard** (0/2) Forecasting

Dashboard Tiles

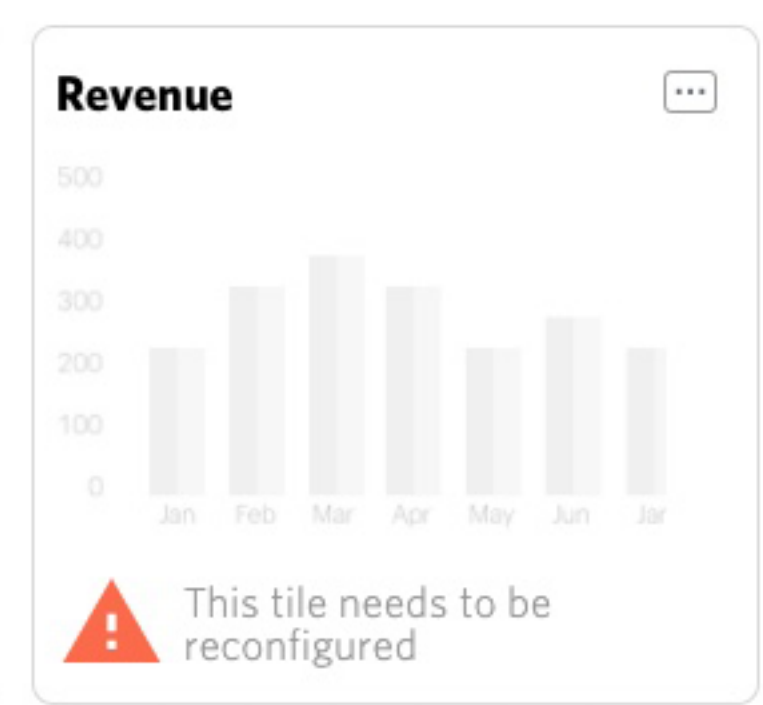
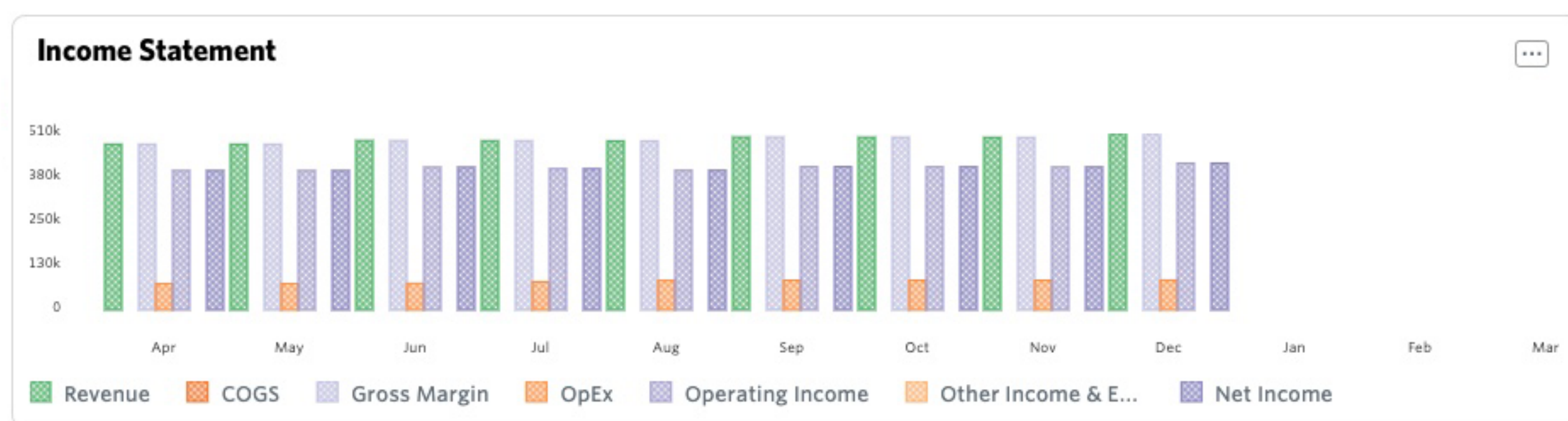
Share Dashboard

Tiles let you show data using different charts and tables on your dashboard.

Create New

column **CREATE**

Video Help (columns)



Getting Started

Set Up (0/3) **Dashboard (0/2)** Forecasting

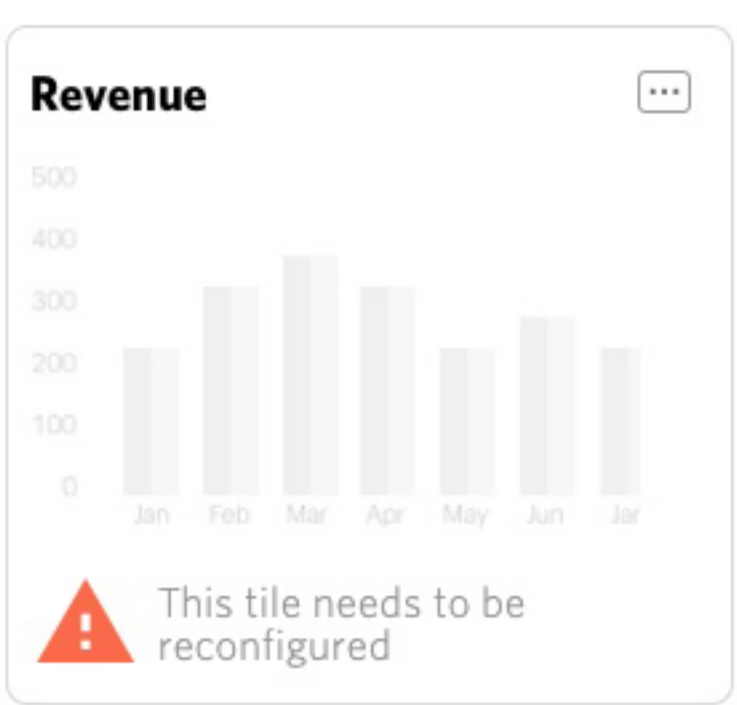
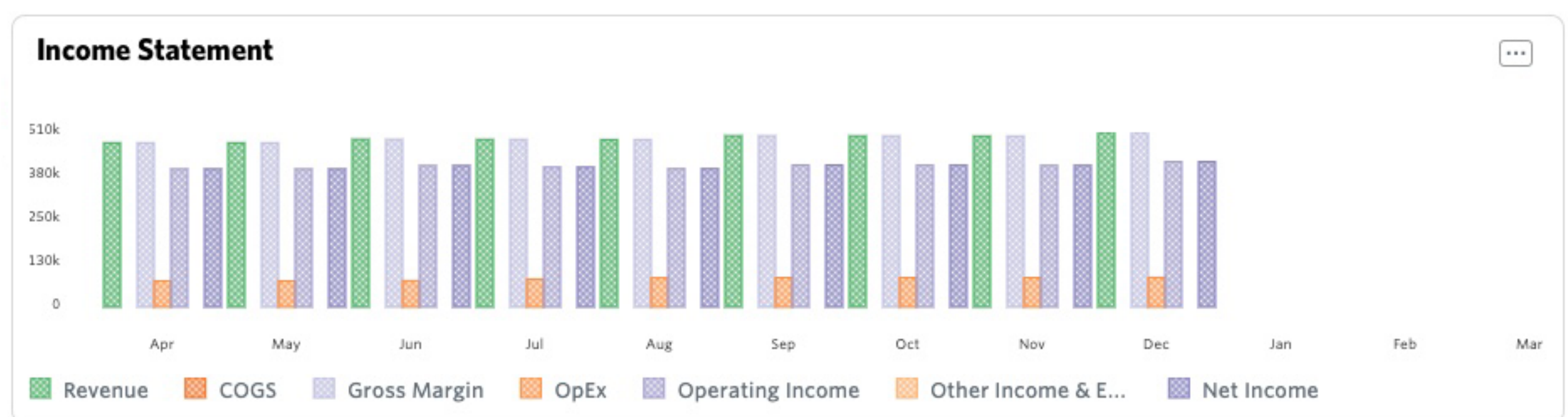
Dashboard Tiles

Share Dashboard

Share dashboard with a colleague for reviews and comments.

SHARE

Video Help



Getting Started

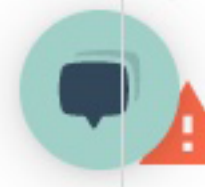
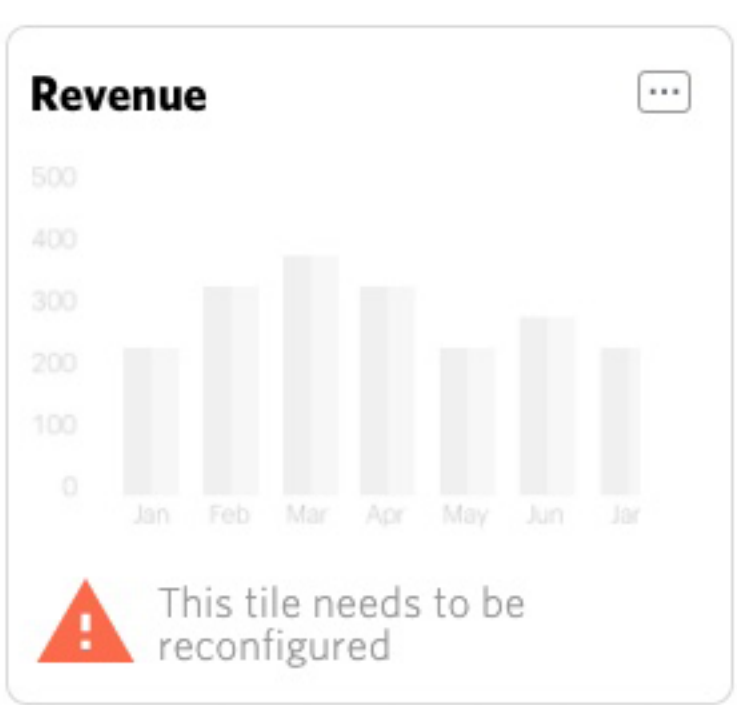
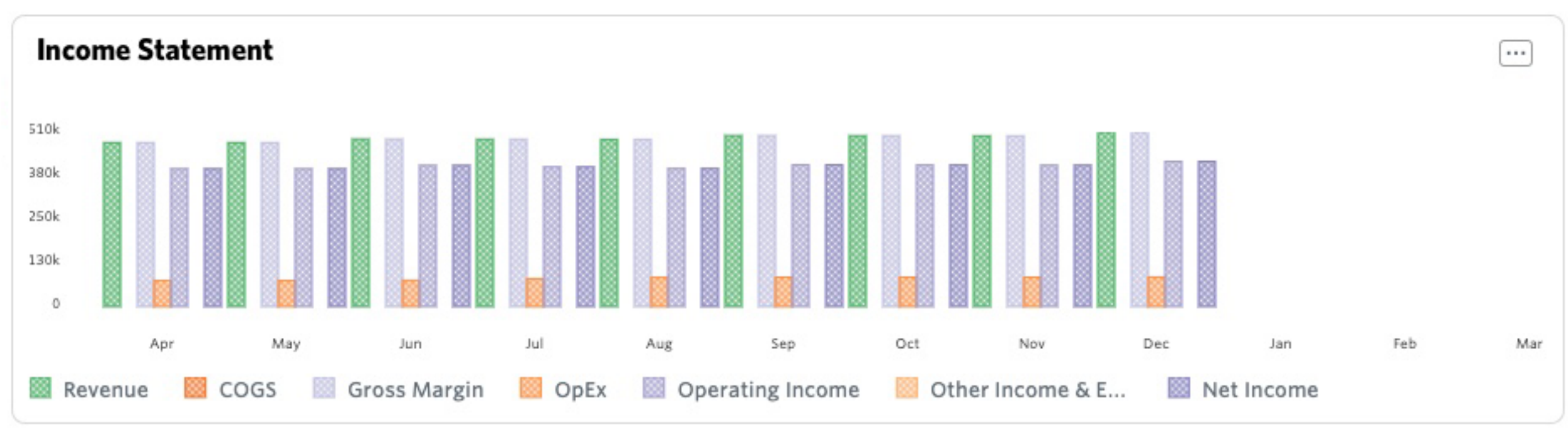
Set Up (0/3) Dashboard (0/2) **Forecasting**

Revenue Forecast Create a Simple Revenue Forecast

Advanced Forecast Intro text goes here, a quick explanation of what the user will be doing in this view.

Confirm dates of your plan
Video Help

Forecast using drivers
Video Help



Getting Started

Set Up (0/3) Dashboard (0/2) **Forecasting**

Revenue Forecast

Advanced Forecast

Create an Advanced Forecast using Custom Table

Intro text goes here, a quick explanation of what the user will be doing in this view.

Create a new custom table

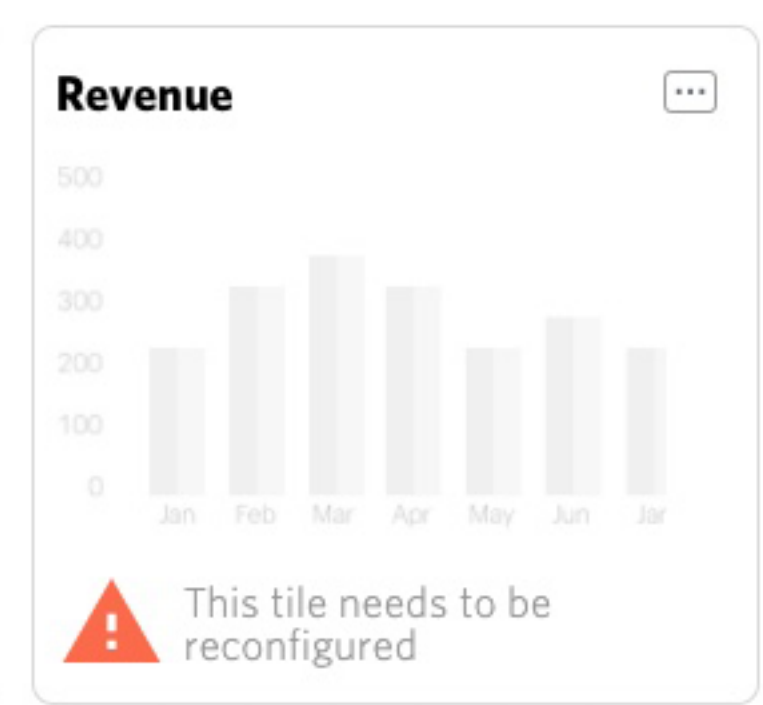
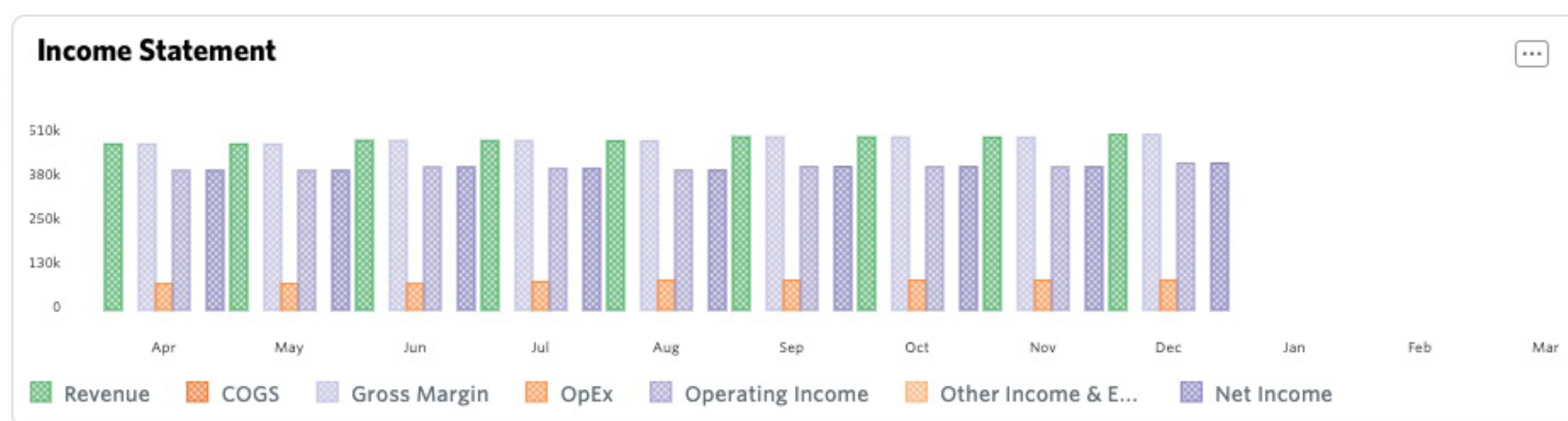
Video Help

Create forecast for the custom table in a plan

Video Help

Forecast using the custom data

Video Help



📘 If you need the "Getting Started" help you can find it under the help menu in the upper right corner. ✕

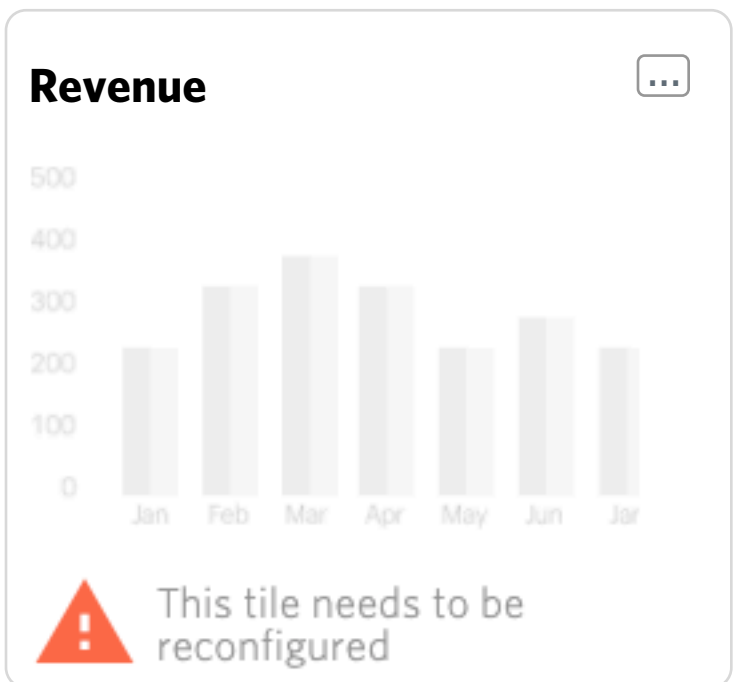
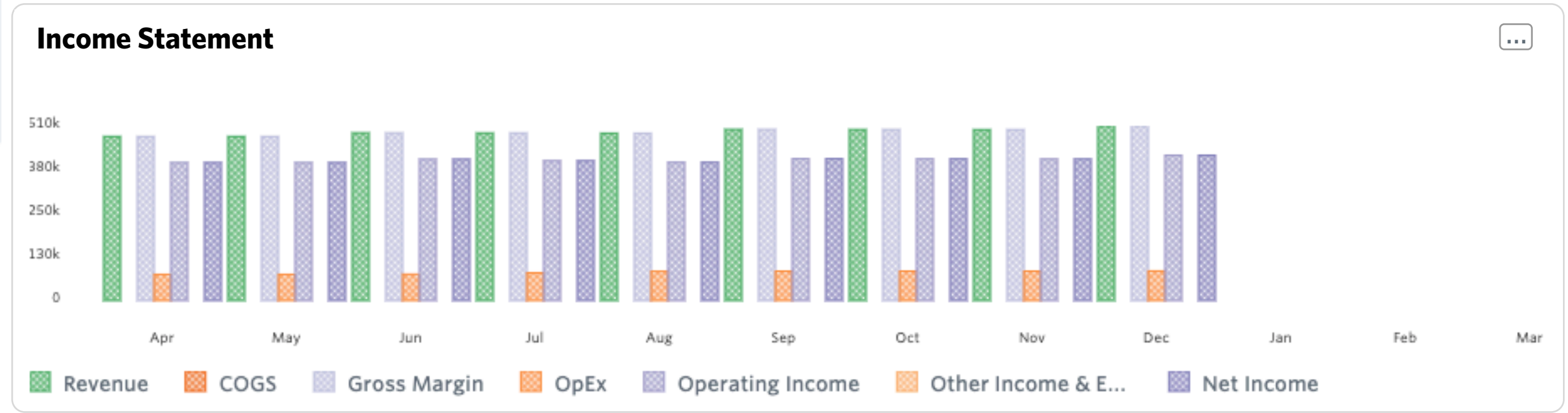


DASHBOARD ⓘ
High Level ▾

← Share

▾ Add New

🖨️ Print Preview



Forms & Buttons

Text Input

Label

Date

Disabled

Date

Active

Dollar

Label (optional)

Percent

Error (Vertical)
 ⚠️ Not valid Email

Error (Horizontal)
 ⚠️
 Not valid Email

Size

Dropdown (doesn't have to be exact)

Label

Disabled

Active

Multi Select

 Option 1
 Option 2
 Option 3

Multi Select Results

Quantity v1

Quantity v2

Predictive Text Search

 Choice

 Test

Buttons

Standard Button
 Cancel

Standard Button Disabled
 Cancel

Outline

Outline disabled

Outline w Icon

Outline w Icon Disabled

Dark Outline

Dark Outline w Icon

Radio Buttons

Label Not Selected
 Option 1
 Option 2
 Option 3

Selected
 Option 1
 Option 2
 Option 3

Disabled
 Option 1
 Option 2
 Option 3

Disabled Selected
 Option 1
 Option 2
 Option 3

Hover
 Option 1
 Option 2
 Option 3

Error Not Selected
 Option 1
 Option 2
 Option 3

⚠️ This is a required selection

Error Not Selected
 Option 1
 Option 2
 Option 3

⚠️ This is a required selection

Toggle On

Toggle Off

Toggle Disabled

Toggle Hover

Check Boxes

Label Not Selected
 Option 1
 Option 2
 Option 3

Selected
 Option 1
 Option 2
 Option 3

Disabled
 Option 1
 Option 2
 Option 3

Disabled Selected
 Option 1
 Option 2
 Option 3

Hover
 Option 1
 Option 2
 Option 3

Error Not Selected
 Option 1
 Option 2
 Option 3

⚠️ This is a required selection

Error Not Selected
 Option 1
 Option 2
 Option 3

⚠️ This is a required selection

Normal Form

Label

Label Not Selected

- Option 1
- Option 2
- Option 3

Label (optional)

 ▼

Label Not Selected

- Option 1
- Option 2
- Option 3

SAVE

Cancel

Filled Out

Label

Label Not Selected

- Option 1
- Option 2
- Option 3

Label (optional)

 ▼

Label Not Selected

- Option 1
- Option 2
- Option 3

SAVE

Cancel

Error

Form Errors

- Error Label will anchor tag to form field

Label

Label Not Selected

- Option 1
- Option 2
- Option 3

Label (optional)

 ▼

Error Not Selected

- Option 1
- Option 2
- Option 3

 This is a required selection

SAVE

Cancel

- Revenue**
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers

Select Department

Hint Text ▾

Your Company	Configuration	Model	Admin
Actuals	Chart of Accounts	Custom Tables	Audit Log
Company	Departments	Global Drivers	Billing
Users	Products	Assumptions	
	Variances		
	Cash Flows		

	Jan-20	Feb-20	Mar-20	Apr-20	May-20	Jun-20	Jul-20	Aug-20	Sep-20	Oct-20
	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-
	-	-	-	-	-	-	-	-	-	-
... <input type="checkbox"/> Billable Expense Income (35) Unassigned	-	-	-	-	-	-	-	-	-	-
... <input type="checkbox"/> Billable Expense Income (34) Unassigned	-	-	-	-	-	-	-	-	-	-
... <input type="checkbox"/> Billable Expense Income (33) Unassigned	-	-	-	-	-	-	-	-	-	-
... <input type="checkbox"/> Billable Expense Income Unassigned	-	-	-	-	-	-	-	-	-	-
... <input type="checkbox"/> Sales Unassigned	-	-	-	-	-	-	-	-	-	-
... <input type="checkbox"/> Uncategorized Income Unassigned	-	-	-	-	-	-	-	-	-	-



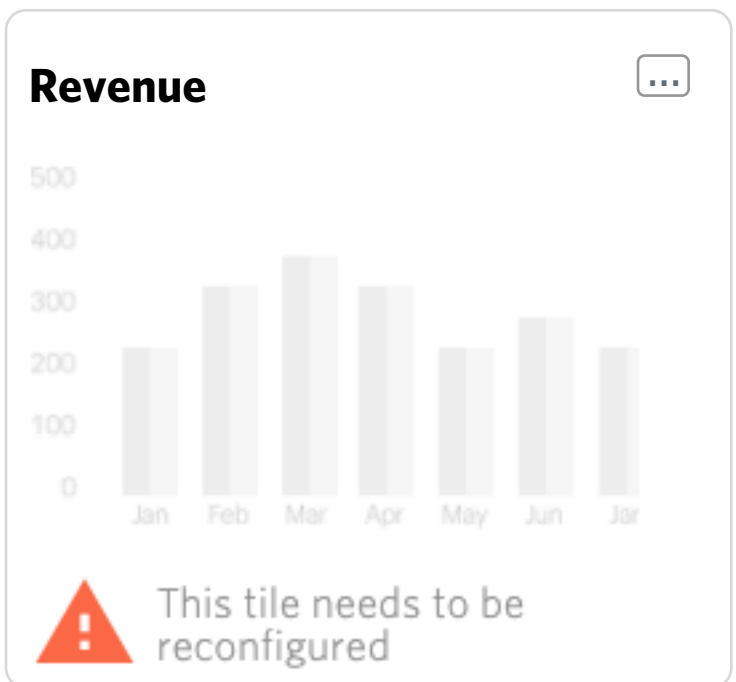
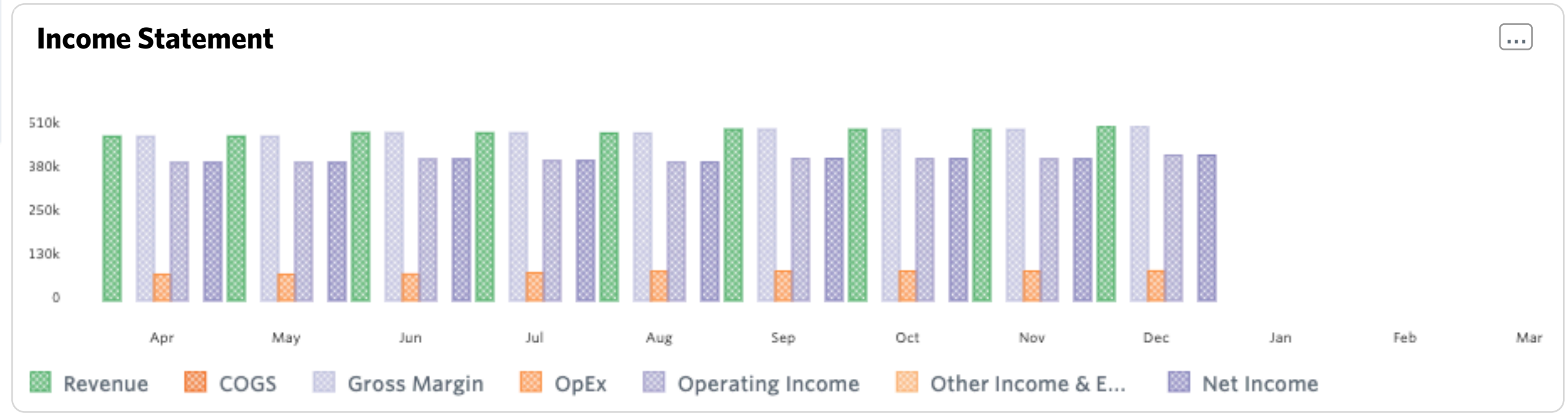


- Help
- Getting Started
- About Jirav

Share

Add New

Print Preview



Status

Accounting			Workforce	Custom	Sales	
Company: ⋮ Company Name goes here and will word wrap.	Chart of Account Last Import: Oct 27, 2020 9:43:30 am	Trial Balances Last Import: Oct 27, 2020 9:43:30 am Date Range: Oct 28, 2020 - Jan 01, 2020 IMPORT	Staff Last Import: 27-Oct-2020	Custom Last Import: 27-Oct-2020	Products Last Import: N/A	Customers Last Import: N/A

Actuals

Accounting ⓘ

CONNECT

▾ Other Accounting Options (add some note explaining why a user can't use these while Quickbooks is selected)

Workforce ⓘ

CONNECT	CONNECT	CONNECT
Excel Template Help Center IMPORT		

Custom ⓘ

Google Sheets CONNECT	Excel IMPORT
-------------------------------------	----------------------------

Sales ⓘ

Upgrade to Import Actual Bookings
UPGRADE

Actuals: Set Up

1 Accounting ⓘ

Import Your Data

CONNECT	CONNECT	CONNECT
CONNECT	CONNECT	

2 Workforce ⓘ

Import Your Data

CONNECT	CONNECT	CONNECT
IMPORT Template Help Center		

3 Custom ⓘ

Import Your Data

CONNECT	IMPORT
----------------	---------------

Sales

	<h3>Upgrade to Import Actual Bookings</h3> <p>TALK TO SALES LEARN MORE</p>
--	--

Integration Status

Accounting ↻ ✔ Chart of Account ✔ Trial Balances 📅 Last Import: Oct 27, 2020 9:43:30 am 📅 Last Import: Oct 27, 2020 9:43:30 am 📅 Date Range: Oct 28, 2020 - Jan 01, 2020	Workforce 🔴 Staff 📅 Last Import: RECONNECT	Custom ✔ Custom 📅 Last Import: Oct 27, 2020	Sales Products 📅 Last Import: Customers 📅 Last Import:
--	---	--	---

Actuals: Set Up

Accounting ⓘ

CONNECT	CONNECT	CONNECT
CONNECT	CONNECT	Rollover saying user cannot select this option.

Workforce ⓘ

CONNECT	CONNECT	CONNECT
Excel 📄 Template 🔍 Help Center IMPORT		

Custom ⓘ

Google Sheets 📄 Template 🔍 Help Center IMPORT	Excel 📄 Template 🔍 Help Center IMPORT
--	--

Sales ⓘ

Sales 📄 Template 🔍 Help Center IMPORT	Customers 📄 Template 🔍 Help Center IMPORT
--	--

Getting Started

1 Accounting	2 Workforce	3 Custom	4 Sales
Chart of Account Last Import: Oct 27, 2020 9:43:30 am	Trial Balances Last Import: Oct 27, 2020 9:43:30 am Date Range: Oct 28, 2020 - Jan 01, 2020	Staff Last Import:	Custom Last Import:
		Products Last Import:	Customers Last Import:

Actuals: Set Up

Accounting

CONNECT	CONNECT	CONNECT
CONNECT	CONNECT	

Workforce

CONNECT	CONNECT	CONNECT
Excel Template Help Center IMPORT		

Custom

Google Sheets Template Help Center IMPORT	Excel Template Help Center IMPORT
--	--

Sales

	Upgrade to Import Actual Bookings
	TALK TO SALES LEARN MORE