





- Customers
- Bookings
- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Drivers

Customers ...




Residential

Add description here...



Commercial

Add description here...



New Customer

Add description here...

Products ▾ ...

Name	Id	List Price	Billing Freq	Billing Delay	Rev Type	Revenue Schedule	Rev Rec Term	Rev Rec Delay	Rev Acct	MRR	TCV
Nest		\$ 400	Upfront		- NRR	Straight	1		- IS · Revenue...	-	\$ 400
Subscription		\$ 10	Monthly		- MRR	Straight	1		- IS · Revenue...	\$ 10	\$ 10

Customers Product Mix ▾ ...

Product	Residential			Commercial			New Customer		
	2018	2019	2020	2018	2019	2020	2018	2019	2020
MRR	1	-	-	-	-	-	-	-	-
Subscription	1	-	-	-	-	-	-	-	-
NRR	-	-	-	100	100	120	-	-	-
Nest	-	-	-	100	100	120	-	-	-

Sales build ▾

Sales Quota ▾ ...



Collaborate On "Budget_1"

Who would you like to invite?

Search by username or email address

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

Invite

Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

X Jim Morrison X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Select Department

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

Invite Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Select Department

	v
Accounting	
Marketing	
Human Resources	
Administration	

- Comment Only
- View Only

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

X Jim Morrison X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Select Department

Accounting v

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

Invite Cancel

Collaborate On "Budget_1"

Who would you like to invite?

X Jim Morrison X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Select Department

Accounting v

Editing Rights

- Full Editing
- Limited Editing (Data Only)
- Comment Only
- View Only

Message

Invite Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Custom Access Step 1: Select Department

Custom Access Step 2:

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Custom Access Step 1: Select Department

	v
Accounting	
Marketing	
Human Resources	
Administration	

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Custom Access Step 1: Select Department

Accounting	v
------------	---

Custom Access Step 2: Select Tables and Access Rights

- Revenue
- Assets
- Cogs
- Liabilities
- Staffing
- Equity
- OpEx
- Custom Table 1
- Custom Table 2
- Other

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison X Mark Calloway

Plan Access

- Full Plan
 By Department
(you may only select one Department per invitation)
 Customize Access

Custom Access Step 1: Select Department

Accounting v

Custom Access Step 2: Select Tables and Access Rights

- Revenue
Select Revenue Access Rights v
- Assets
Select Assets Access Rights v
- Cogs
 Liabilities
 Staffing
- Equity
Select Equity Access Rights v
- OpEx
 Custom Table 1
 Custom Table 2
 Other

Message

- Invite Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Custom Access Step 1: Select Department

Accounting	▼
------------	---

Custom Access Step 2: Select Tables and Access Rights

- Revenue

Select Revenue Access Rights	▼
Full Edit	
Limited Edit (Data Only)	
Comment Only	
View Only	

- Liabilities

- Staffing

- Equity

Select Equity Access Rights	▼
-----------------------------	---

- OpEx

- Custom Table 1

- Custom Table 2

- Other

Message

- Invite
- Cancel

Collaborate On "Budget_1"

Who would you like to invite?

- X Jim Morrison
- X Mark Calloway

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Custom Access Step 1: Select Department

Accounting	v
------------	---

Custom Access Step 2: Select Tables and Access Rights

- Revenue

Full Edit	v
-----------	---
- Assets

Full Edit	v
-----------	---
- Cogs
- Liabilities
- Staffing
- Equity

Full Edit	v
-----------	---
- OpEx
- Custom Table 1
- Custom Table 2
- Other

Message

- Invite
- Cancel

Congratulations!

You have invited

- Jim Morrison
- Mark Callaway

to collaborate on Budget_1.

- Customers
- Bookings
- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Drivers

Customers ...

Residential Add description here...

Commercial Add description here...

Add description here...

Products ...

Name	Id	List Price	Billing Freq	Billing Delay	Rev Type	Revenue Schedule	Rev Rec Term	Rev Rec Delay	Rev Acct	MRR	TCV
Nest		\$ 400	Upfront		- NRR	Straight	1		- IS · Revenue...	-	\$ 400
Subscription		\$ 10	Monthly		- MRR	Straight	1		- IS · Revenue...	\$ 10	\$ 10

Customers Product Mix ...

Product	Residential			Commercial			New Customer		
	2018	2019	2020	2018	2019	2020	2018	2019	2020
MRR	1	-	-	-	-	-	-	-	-
Subscription	1	-	-	-	-	-	-	-	-
NRR	-	-	-	100	100	120	-	-	-
Nest	-	-	-	100	100	120	-	-	-

Sales build ...

Sales Quota ...



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

Customers ...

Residential
Add description here...

Commercial
Add description here...

New Customer
Add description here...

Products ...

Name	Id	List Price	Billing Freq	Billing Delay	Rev Type	Revenue Schedule	Rev Rec Term	Rev Rec Delay	Rev Acct	MRR	TCV
Nest		\$ 400	Upfront		- NRR	Straight	1		- IS · Revenue...	-	\$ 400
Subscription		\$ 10	Monthly		- MRR	Straight	1		- IS · Revenue...	\$ 10	\$ 10

Customers Product Mix ...

Product	Residential			Commercial			New Customer		
	2018	2019	2020	2018	2019	2020	2018	2019	2020
MRR	1	-	-	-	-	-	-	-	-
Subscription	1	-	-	-	-	-	-	-	-
NRR	-	-	-	100	100	120	-	-	-
Nest	-	-	-	100	100	120	-	-	-

Sales build

Sales Quota ...



Collaborative Access

Collaborator	Date	Plan Access	Department	Edit Rights	Status	Status Update	Actions
Lemmy Kilmeister	Aug 28, 2020	Full Plan	N/A	Comment Only	Active	Aug 28, 2020	 Edit  User View
Jim Morrison	Aug 28, 2020	By Department	Accounting	Full Edit	Active	Aug 28, 2020	 Edit  User View
Jim Morrison	Aug 28, 2020	Full Plan	Accounting	Full Edit	Active	Aug 28, 2020	 Edit  User View
Jim Morrison	Aug 28, 2020	Custom Access	Human Reso...	Comment Only	Active	Aug 28, 2020	 Edit  User View
Mark Calloway	Aug 28, 2020	By Department	Administration	View Only	Active	Aug 28, 2020	 Edit  User View
John Densmore	Aug 28, 2020	By Department	Administration	Limited Edit	Active	Aug 28, 2020	 Edit  User View
John Densmore	Aug 28, 2020	Custom Access	Human Reso...	Comment Only	Active	Aug 28, 2020	 Edit  User View
Mick Foley	Aug 28, 2020	By Department	Accounting	Limited Edit	Active	Aug 28, 2020	 Edit  User View
Joe Perry	Aug 28, 2020	Full Plan	N/A	Comment Only	Active	Aug 28, 2020	 Edit  User View
Brad Whitford	Aug 28, 2020	Custom Access	Administration	View Only	Active	Aug 28, 2020	 Edit  User View

Edit Access Budget_1 for Jim Morrison

Plan Access

- Full Plan
- By Department
(you may only select one Department per invitation)
- Customize Access

Select Department

Accounting	v
------------	---

Editing Rights

- Full Editing
- Limited
- Comment Only
- View Only

Message

Update	Cancel	Revoke Access
---------------	---------------	----------------------

✕

Are you sure you want to revoke user's access?

This action cannot be undone.

Editing Rights

- Full Editing
- Limited
- Comment Only
- View Only

Message



PLAN ACTIVE Budget_1



Plan Collaboration: Full Plan Access and Edit Rights

Dept: Sales

Revenue by Account

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Sales	-	-	-	-	-	-	-	-	-	-	-

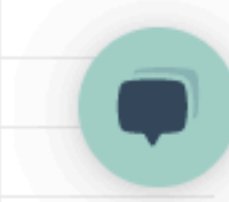
Add Comment

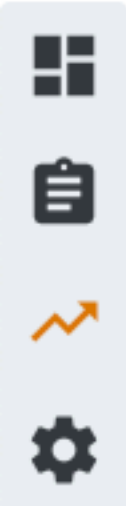
Comment input area

	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	
Revenue \$	-	-	-	\$ 231,740	\$ 240,032	\$ 248,216	\$ 266,421	\$ 286,219	\$ 296,589	\$ 311,146
MRR	-	-	-	\$ 2,573	\$ 5,032	\$ 7,382	\$ 9,755	\$ 12,052	\$ 14,256	\$ 16,480
NRR	-	-	-	\$ 229,167	\$ 235,000	\$ 240,833	\$ 256,667	\$ 274,167	\$ 282,333	\$ 294,667

Billings by Account

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Billings	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-





PLAN ACTIVE Budget_1



Plan Collaboration: By Department, Administration Limited Edit (Data Only)

Dept: Administration

Revenue by Account

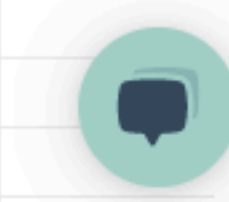
Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Sales	-	-	-	-	-	-	-	-	-	-	-

Revenue by Product

Product	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
Revenue \$	-	-	-	-	-	\$ 231,740	\$ 240,032	\$ 248,216	\$ 266,421	\$ 286,219	\$ 296,589	\$ 311,146
MRR	-	-	-	-	-	\$ 2,573	\$ 5,032	\$ 7,382	\$ 9,755	\$ 12,052	\$ 14,256	\$ 16,480
NRR	-	-	-	-	-	\$ 229,167	\$ 235,000	\$ 240,833	\$ 256,667	\$ 274,167	\$ 282,333	\$ 294,667

Billings by Account

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Billings	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-





PLAN ACTIVE Budget_1

Share & Collaborate

Let's Collaborate!

You have been invited by Mike Hough to collaborate on Budget_1. You have access to Department: Administration with Limited Editing (data only).
[Let's get started.](#)

Plan Collaboration: By Department, Administration Limited Edi

Dept: Administration

Revenue by Account

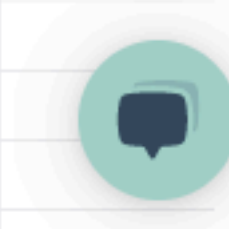
Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Sales	-	-	-	-	-	-	-	-	-	-	-

Revenue by Product

Product	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
Revenue \$	-	-	-	-	-	\$ 231,740	\$ 240,032	\$ 248,216	\$ 266,421	\$ 286,219	\$ 296,589	\$ 311,146
MRR	-	-	-	-	-	\$ 2,573	\$ 5,032	\$ 7,382	\$ 9,755	\$ 12,052	\$ 14,256	\$ 16,480
NRR	-	-	-	-	-	\$ 229,167	\$ 235,000	\$ 240,833	\$ 256,667	\$ 274,167	\$ 282,333	\$ 294,667

Billings by Account

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Billings	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-





PLAN ACTIVE
Budget_1 ▾

 Share & Collaborate



Plan Collaboration: By Department, Administration Limited Edit (Data Only)

Dept: Administration

Revenue by Account ⓘ ▾ ... 

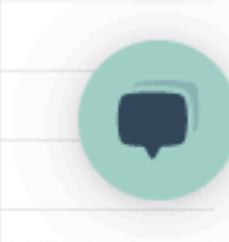
Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Sales	-	-	-	-	-	-	-	-	-	-	-

Revenue by Product ⓘ ▾ ... 

Product	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
Revenue \$	-	-	-	-	-	\$ 231,740	\$ 240,032	\$ 248,216	\$ 266,421	\$ 286,219	\$ 296,589	\$ 311,146
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Billings by Account ⓘ ▾ ... 

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Billings	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-





PLAN ACTIVE
Budget_1 ^

Share & Collaborate



ACTIVE

Budget

COLLABORATE

Budget_1

Manage Plans

Collaboration: By Department, Administration Limited Edit (Data Only)

Dept: Administration

Revenue by Account ⓘ ...

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-
Interest Income	Sales	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Sales	-	-	-	-	-	-	-	-	-	-	-

Revenue by Product ⓘ ...

Product	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18
Revenue \$	-	-	-	-	-	\$ 231,740	\$ 240,032	\$ 248,216	\$ 266,421	\$ 286,219	\$ 296,589	\$ 311,146
MRR	-	-	-	-	-	\$ 2,573	\$ 5,032	\$ 7,382	\$ 9,755	\$ 12,052	\$ 14,256	\$ 16,480
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Billings by Account ⓘ ...

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Billings	Sales	-	-	-	-	-	-	-	-	-	-	-
Sales	Sales	-	-	-	-	-	-	-	-	-	-	-
Other Revenue	Sales	-	-	-	-	-	-	-	-	-	-	-

- COGS
- Staffing
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