



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

Dept: Unassigned

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

Plan Share Management

Dept: Unassigned

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

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

New Feature

Share your plans and collaborate with others by granting editorial access and assigning tasks to streamline your workflow

Got It

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

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

SHARE

NEXT ▶

Cancel



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

What access do you want to give?

- Edit
- Comment Only



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

What access do you want to give?

- Edit
- Comment Only



Plan Share: Budget_1

Warning

If you Cancel you will lose your changes,
do you want to proceed?

No Yes

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

What access do you want to give?

- Edit
- Comment Only

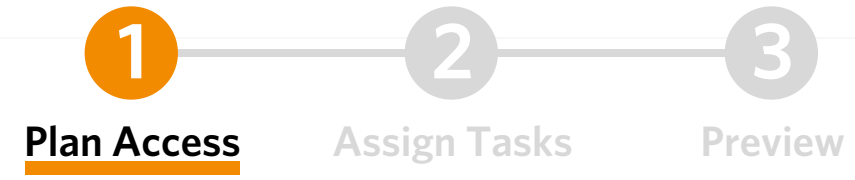
SHARE

NEXT ▶

Cancel



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Select Department(s)

 v

What access do you want to give?

- Edit
- Comment Only

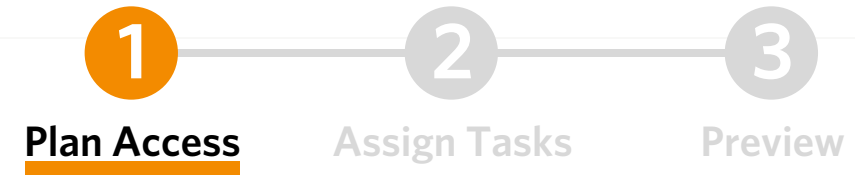
SHARE

NEXT ▶

Cancel



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Select Department(s)

▼

- Department Name
- HR
- Marketing
- Engineering
- Another
- Other

- Consolodated view

APPLYCancel

Cancel



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Select Department(s)

v

- Department Name
- HR
- Marketing
- Engineering
- Another
- Other

- Consolodated view

APPLYCancel

NEXT ▶

Cancel



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Select Department(s)

 ▾

What access do you want to give?

- Edit
- Comment Only

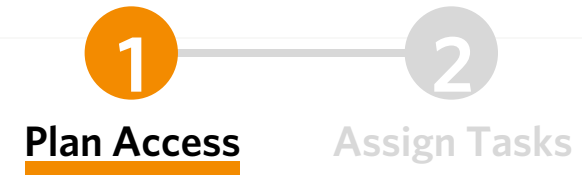
SHARE

NEXT ▶

Cancel



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Select Department(s)

 ▾

What access do you want to give?

- Edit
- Comment Only

SHARE

PREVIEW

NEXT ▶

Cancel

Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input type="checkbox"/> Apply to All Departments	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> HR	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Marketing	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Consolidated View	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input type="checkbox"/> Apply to All Departments	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> HR	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Marketing	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Consolidated View	Rollover placeholder explanation goes here. FPO ent Only	

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only

Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input checked="" type="checkbox"/> Apply to All Departments	<input type="checkbox"/> Select All <input type="checkbox"/> Revenue <input checked="" type="checkbox"/> COGS <input type="checkbox"/> Staffing (Contains Confidential Data) <input checked="" type="checkbox"/> OpEx <input checked="" type="checkbox"/> Other	<input type="radio"/> Full Edit <input type="radio"/> Comment Only <input type="radio"/> Full Edit <input type="radio"/> Comment Only <input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only <input type="radio"/> Full Edit <input type="radio"/> Comment Only <input checked="" type="radio"/> Full Edit <input checked="" type="radio"/> Comment Only <input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="button" value="UPDATE"/> <input type="button" value="Cancel"/>		
<input checked="" type="checkbox"/> HR	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Marketing	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Consolidated View	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input type="checkbox"/> Apply to All Departments	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> HR	<input type="checkbox"/> Select All	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
	<input type="checkbox"/> Revenue	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
	<input checked="" type="checkbox"/> COGS	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
	<input type="checkbox"/> Staffing (Contains Confidential Data)	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
	<input checked="" type="checkbox"/> OpEx	<input type="radio"/> Full Edit <input checked="" type="radio"/> Comment Only
	<input checked="" type="checkbox"/> Other	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="button" value="UPDATE"/> <input type="button" value="Cancel"/>		
<input type="checkbox"/> Marketing	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Consolidated View	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input type="checkbox"/> Apply to All Departments	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> HR	COGS, OpEx, Other	Mixed Access By Module
<input checked="" type="checkbox"/> Marketing	All Modules	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Consolidated View	All Modules	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input checked="" type="checkbox"/> Apply to All Departments	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> HR	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Marketing	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Consolidated View	All Modules	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only



Plan Share: Budget_1



Who would you like to invite?

What would you like to call this collaboration?

Message

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Grant access by Department

Department	Modules	Access
<input type="checkbox"/> Apply to All Departments	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> HR	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Marketing	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Engineering	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input type="checkbox"/> Other Dept	All Modules	<input type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Consolidated View	All Modules	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only

Non-Department Specific Data

Modules	Access
<input checked="" type="checkbox"/> Select All	
<input checked="" type="checkbox"/> Customers	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Bookings	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Assets	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Liabilities	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Equity	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only
<input checked="" type="checkbox"/> Custom	<input checked="" type="radio"/> Full Edit <input type="radio"/> Comment Only



Plan Share: Budget_1

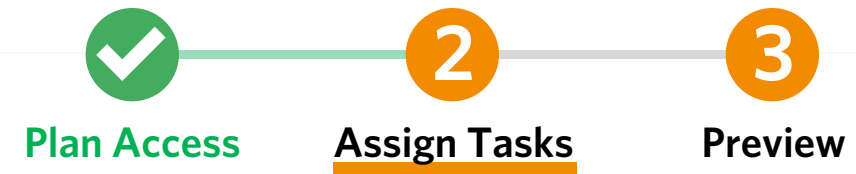


Department ▼ Access: Edit

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

Plan Share: Budget_1



 All Tasks

Department Access: Edit

COGS     

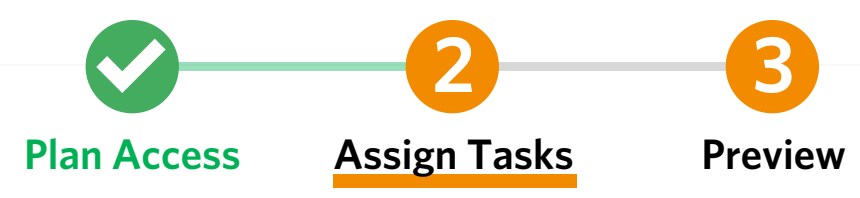
 Assign Task

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

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



Plan Share: Budget_1



All Tasks

Department Access: Edit

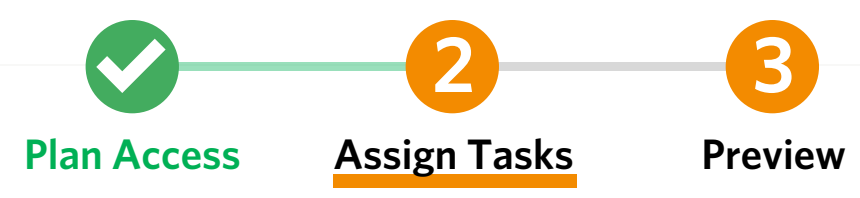
COGS

Assign specific tasks to collaborators at the table level. Assign Task

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

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

Plan Share: Budget_1



All Tasks

Department v Access: Edit

COGS ...

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

Assign Task

Select Owner(s) v

Description

+

Assign Task

Cancel

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

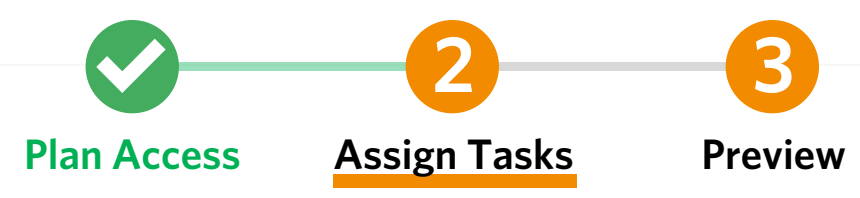
PREVIOUS

SHARE

NEXT

Cancel

Plan Share: Budget_1



All Tasks

Department v Access: Edit

COGS [icon] [icon] [icon]

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

Assign Task

Select Owner(s) v

Description

+

Select Owner(s) v

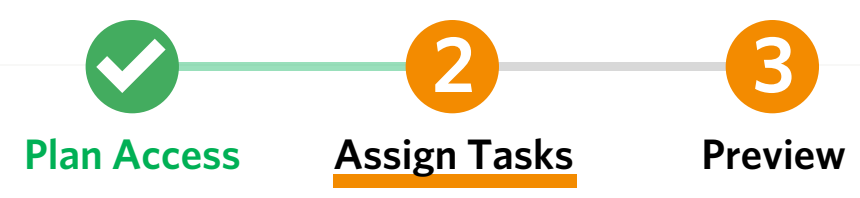
Description

+

Assign Task Cancel

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

Plan Share: Budget_1



All Tasks

Department v Access: Edit

COGS

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

Assign Task

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

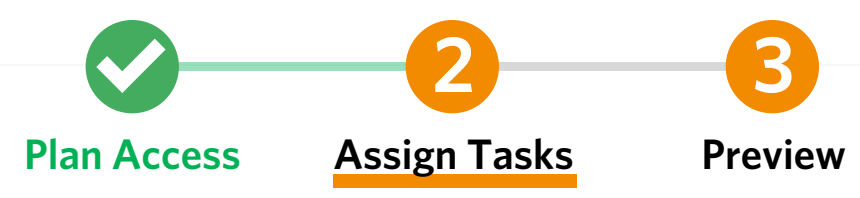
+ ✎ 🗑

✔ Your task(s) have been Assigned!

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



Plan Share: Budget_1



All Tasks

Department v Access: Edit

COGS [icon] [icon] [icon]

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

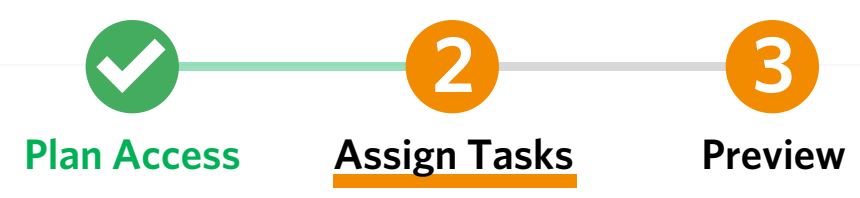
- Customers
- Bookings
- Revenue
- COGS
- Staffing
- OpEx
- Other
- Assets
- Liabilities
- Equity
- Custom
- Assumptions
- Drivers

Assign Task

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



Plan Share: Budget_1



All Tasks

Department v Access: Edit

COGS [icon] [icon] [icon]

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

Edit Task

Select Owner(s)
 v

Description

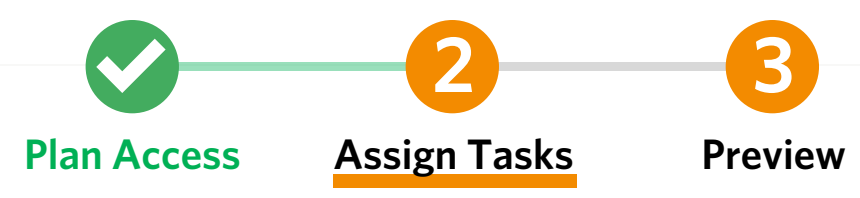
+ [trash icon]

Update Task Cancel

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



Plan Share: Budget_1



All Tasks

Department Access: Edit

COGS

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

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

Task List

Module Name

Department Name

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



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

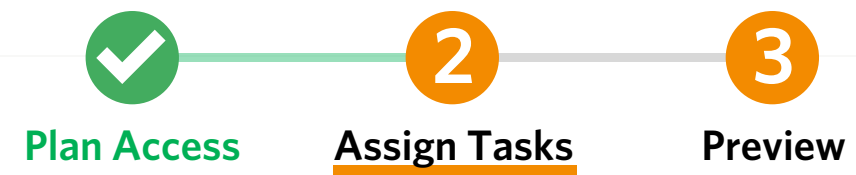


Department Name

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



Plan Share: Budget_1



All Tasks

Department Access: Edit

COGS

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

Task List

Module Name

Department Name

Jan 05, 2021

Assigned to: Jim Morrison, Robby Kreiger

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Select Owner(s)

Owner ▼

Description



Update Task Cancel

Department Name

Jan 05, 2021

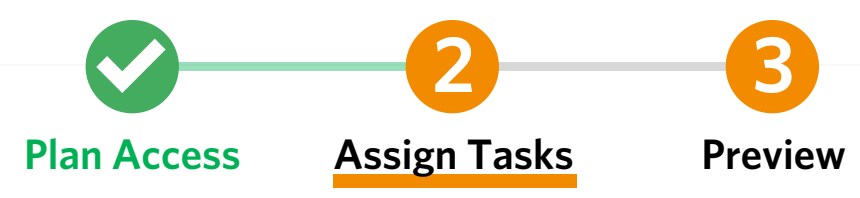
Assigned to: Jim Morrison, Robby Kreiger

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



Plan Share: Budget_1



All Tasks

Department 5 v Access: Edit
COGS 1 v
 Option 1 3
 Option 2
 Option 3 2

Assign Task 5

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

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



Plan Share Management

Search Recipients

Name	Created By	Created On	Shared By	Shared On	Last Edited	Progress	Plan Actions
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With
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▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With

Plan Share Management

 Search Recipients

Name	Created By	Created On	Shared By	Shared On	Last Edited	Progress	Plan Actions																												
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit Plan Access 👁 View 📋 Manage Tasks 🗑 Delete 🔗 Share With																												
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit Plan Access 👁 View 📋 Manage Tasks 🗑 Delete 🔗 Share With																												
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<table border="1"> <thead> <tr> <th>Shared With</th> <th>Last Viewed</th> <th>Last Edited</th> <th>Status</th> <th>Revoked By</th> <th>Progress</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>JoePerry@bobsfinance.com</td> <td>2020-10-05 10:13:14 AM</td> <td>2020-10-05 10:13:14 AM</td> <td>Active</td> <td></td> <td>10/20</td> <td>⊗ Revoke</td> </tr> <tr> <td>MickFoley@company.com</td> <td>2020-10-05 10:13:14 AM</td> <td>2020-10-05 10:13:14 AM</td> <td>Revoked</td> <td>Steven Tyler</td> <td></td> <td></td> </tr> <tr> <td>Rodericktoombs@piper.com</td> <td>2020-10-05 10:13:14 AM</td> <td>2020-10-05 10:13:14 AM</td> <td>Complete</td> <td></td> <td>10/10</td> <td>⊗ Revoke</td> </tr> </tbody> </table>								Shared With	Last Viewed	Last Edited	Status	Revoked By	Progress	Actions	JoePerry@bobsfinance.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Active		10/20	⊗ Revoke	MickFoley@company.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Revoked	Steven Tyler			Rodericktoombs@piper.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Complete		10/10	⊗ Revoke
Shared With	Last Viewed	Last Edited	Status	Revoked By	Progress	Actions																													
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MickFoley@company.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Revoked	Steven Tyler																															
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▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit Plan Access 👁 View 📋 Manage Tasks 🗑 Delete 🔗 Share With																												



Warning

Are you sure you want to revoke access?
This cannot be undone

No Yes

Plan Share Management

Search Recipients

Name	Created By	Created On	Shared By	Shared On	Last Edited	Progress	Plan Actions
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit Plan Access 👁 View 📋 Manage Tasks 🗑 Delete 🔗 Share With
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▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit Plan Access 👁 View 📋 Manage Tasks 🗑 Delete 🔗 Share With

Congratulations!

You have invited

- Jim Morrison
- Mark Callaway

to collaborate on Budget_1.

Close Window

Plan Share Management

Search Recipients

Name	Created By	Created On	Shared By	Shared On	Last Edited	Progress	Plan Actions
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With
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Plan Share Management

Search Recipients

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▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit Plan Access 👁 View 📋 Manage Tasks 🗑 Delete 🔗 Share With
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Plan Share Management

Name	Created By	Created On	Shared By	Shared On	Last Edited	Progress	Plan
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit
▲ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit
Shared With	Last Viewed	Last Edited	Status	Revoked By	Progress	Actions	
JoePerry@bobsfinance.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Active		10/20	⊗ Revoke	
MickFoley@company.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Revoked	Steven Tyler			
Rodericktoombs@piper.com	2020-10-05 10:13:14 AM	2020-10-05 10:13:14 AM	Complete		10/10	⊗ Revoke	
▼ Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	✎ Edit



Task List Progress

Plan Name: Name of Plan

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,

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

Department
Access: Edit

COGS

 Assign Task

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



Edit Plan Share: Budget_1

Edit Plan Access

What part of the plan do you want to share?

- Share the Full Plan
- Restrict By Department
- Custom Plan Access

Select Department(s)

 ▼

What access do you want to give?

- Edit
- Comment Only

UPDATE

Cancel

Plan Share Management

Search Recipients

Name	Created By	Created On	Shared By	Shared On							
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM						View Manage Tasks Delete Share With	
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access	View	Manage Tasks	Delete	Share With
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Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access	View	Manage Tasks	Delete	Share With

Share Plan

Who would you like to invite?

Jim Morrison <Jim@thedoors.com> X

Message

UPDATE Cancel



Warning

Are you sure you want to delete the share?
This cannot be undone

Plan Share Management

Search Recipients

Name	Created By	Created On	Shared By	Shared On	Last Edited	Progress	Plan Actions
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With
Plan Name	Robby Krieger	2020-10-05 10:13:14 AM	Brad Whitford	2020-10-30 10:13:14 AM	2020-11-05 10:13:14 AM	0/20	Edit Plan Access View Manage Tasks Delete Share With

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

Department v Access: Edit

COGS

2 Tasks

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



Assign New Tasks

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

Department Access: Edit

COGS

2 Tasks

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	Unassigned	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



Let's Collaborate

You have been invited by Mike Hough to collaborate on Budget_1.

[Get Started](#)

Dept: Unassigned

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

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

Collaboration Instructions (FPO) ✕

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Task List

[View Task List](#)

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

Dept: Unassigned
COGS
[View Task](#)

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



PLAN ACTIVE
Budget_1 ▾

All Tasks
 Share

Department 5 ▾ Access: Edit
COGS 1 ▾
 Option 1 3 tasks
 Option 2
 Option 3 2

Tasks

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

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

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

Department ▾

COGS ⓘ ▾ ... 📊 🗨️ 🗑️

📄 2 Tasks

Account	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18
Revenue	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	-	-	-	-	-	-	-	-	-	-
Unmapped	-	-	-	-	-	-	-	-	-	-
COGS	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	-	-	-	-	99%	100%	100%	100%	100%	100%

Add Comment to Cogs Table ✕

Select Owner(s)

[Comment](#) [Cancel](#)



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

Department ▼

COGS

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

All Tasks

Module Name

Department Name

Jan 05, 2021

Assigned to: Jim Morrison, Robby Kreiger

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.

Mark Completed

Jan 05, 2021

Assigned to: Jim Morrison, Robby Kreiger

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.

Completed

Module Name

Department Name

Jan 05, 2021

Assigned to: Jim Morrison, Robby Kreiger

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do.

Mark Completed

[Go to Task](#)



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

Department Access: Edit

COGS

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

All Tasks

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



Department ▾

Access: Edit

COGS ⓘ ▾ ...

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 22
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 24
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -1
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 22
Gross Margin %	Unassigned	-	-	-	-	-	99%	

All Tasks

Department Name

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

Completed

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

Department v

COGS

Tasks Completed

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	



Plan Share: Budget_1



Plan Access Preview Assign Tasks

Who would you like to invite?

Message

What part of the plan do you want to share?

Restrict By Department

Select Department(s)

 v

What access do you want to give?

Edit

Comment Only

SHARE

NEXT ▶

Cancel



Plan Share: Budget_1



10

Department

COGS    

 Assign Task

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	-	-	-	-	-	\$ 214,603	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030	\$ 253,921	\$ 273,941	\$ 295,463	\$
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534	\$ -19,534	\$ -18,034	\$ -18,034	\$
Interest Income	Unassigned	-	-	-	-	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-	-	-	-	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495	\$ 234,386	\$ 255,907	\$ 277,429	\$
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%	100%	100%	100%	

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

Plan Share: Budget_1



10

Department v

COGS [icon] [icon] [icon]

Assign Task

Account	Department	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18
Revenue	Unassigned	-	-	-	-	-	\$ 214,603	\$ 224,495
Sales	Unassigned	-	-	-	-	-	\$ 234,138	\$ 244,030
Other Revenue	Unassigned	-	-	-	-	-	\$ -19,534	\$ -19,534
Interest Income	Unassigned	-	-	-	-	-	-	-
Unmapped	Unassigned	-	-	-	-	-	-	-
COGS	Unassigned	-	-	-	-	-	\$ 1,234	-
Cost of Goods Sold	Unassigned	-	-	-	-	-	\$ 1,234	-
Gross Margin \$	Unassigned	-	-	-	-	-	\$ 213,369	\$ 224,495
Gross Margin %	Unassigned	-	-	-	-	-	99%	100%

Edit Owner ✕

Select Owner(s)

v

Description
Aug 20, 2020
@Jim Morrison
Lorem ipsum dolor sit amet, consectetur adipiscing.

Update Task Cancel

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