

## Link PlanGuru with work in an Excel spreadsheet

Have you already computed budgeted or projected amounts for a particular category, say sales projections, in Excel? If so, you can now link those amounts to your PlanGuru projection!

Version 11 gives you the ability to take advantage of the flexibility of Excel to compute amounts outside of PlanGuru and then link a line item in your budget/projection to the Excel spreadsheet.

## Reduce set-up time with a new wizard

If you're not importing information, setting up a new analysis by adding accounts one by one can be a time consuming task.

The new setup wizard simplifies and speeds the process by letting you chose accounts from a standard chart of accounts, assign budgeting/projection methods and enter historical data all in one step. Plus, the standard chart of accounts is editable. You can add additional accounts and edit the accounts in the standard chart of accounts.

## Supporting schedules flexibility enhanced

Judging by the feedback we've received, adding the ability to create supporting schedules was one of the most popular enhancements we made

in Version 10. So we decided to make the supporting schedules even better.

In Version 11 you'll have 2 additional projection methods for computing amounts on supporting schedule. You will now also be able to use the Percent of Other Categories and Function of Non-financial items projection methods in your supporting schedules.

## New flexibility with notes payable wizard

In previous versions a note had to be added using the note payable wizard to be able to enter terms for the note. If you imported your categories or added the note payable category using another method, you had to delete the note payable category and then re-add it to use the notes payable wizard.

Version 11 enables you to convert a note payable category to the terms method without having to delete and re-add it.

## Enhanced import utilities will make set-up easier

**QuickBooks import** - The QuickBooks import utility has been enhanced. Version 11 QuickBooks import utility gives you new options for how your QuickBooks accounts are handled during the import process (Consultant edition only)

**Excel import** – The user friendliness of the Excel import setup has been improved and templates are being added for popular accounting software.

## Batch printing financial statements will make printing reports easier

Version 11 includes the ability to define and print a batch of financial statement reports.

This new feature will speed up the printing process since you'll only have to make your report format options selections once for all the statements. Plus, you'll be able to save the batch set-up definition for future use.

## Upgrading to Version 11 isn't just about getting new features.

In order to have future access to technical support you need to upgrade to Version 11.

When you upgrade to Version 11 you get the features of Version 11 plus support for less than the price most vendors charge for support alone.

## Group statement of cash flows line items

With the balance sheet and income statement you've had the ability to group categories together on the reports for presentation purposes.

We've added that same flexibility to the statement of cash flows. This new option will enable you to get rid of unnecessary detail on the statement of cash flows and will improve the appearance of this financial statement.

## Additional flexibility in the Export to Excel utility

Another popular addition we made in Version 10 was the ability to generate the statement of cash flows on the direct method.

In Version 11 we've added the ability to export the direct method statement of cash flows to Excel.

## Direct method Budget vs Actual statement of cash flows

We've added the ability to print the budget vs actual statement of cash flows using the direct method.

## Print supporting schedules one per page

You'll now have the option to print the supporting schedules one per page or together as one report.

## Financial statement total descriptions enhanced

Total descriptions will now be more descriptive, for example, the total for Current Assets will print as "Total Current Assets".

## Still at Version 8 or 9?

Then here is just some of what you'll also get when you upgrade to Version 11

- User defined margins on financial statements
- Support for the Microsoft Vista operating system.
- Ability to run PlanGuru on your network server. (optional)
- Statement of cash flows on the direct method
- Ability to save Excel import setups
- Ability to export more reports to Excel
- Ability to create variable budget vs actual reports