

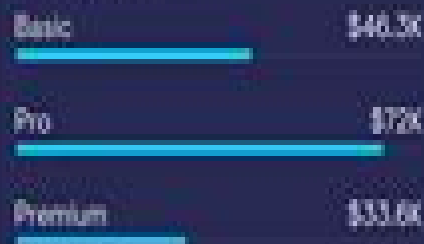
Totals (last 30 days)

\$151.9k

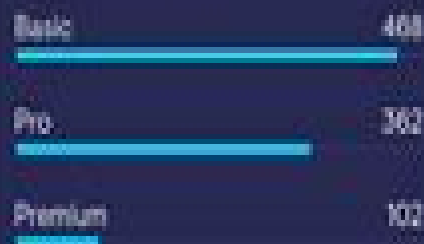
MRR

▲ +7,737

MRR by plan

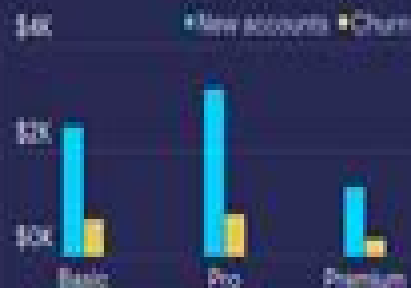


No. of accounts

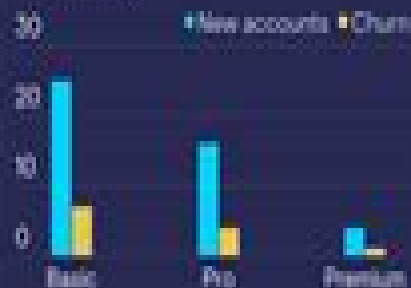


Change (last 30 days)

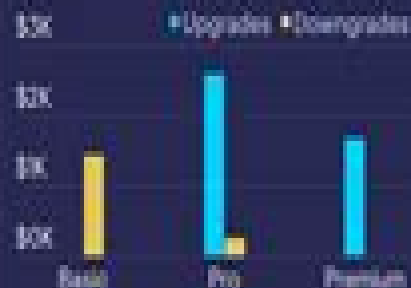
MRR



Accounts



Plan change



Onboarding (last 30 days)

45

New accounts

3

Avg. days until onboarded



CSAT of new accounts



Low scores

Newhaven	1
Arcane Logistics	1
Bio	2
Clean Sellers	2
Brook plc	2

Low engagement (>45 days)

103

Accounts at risk

\$15.5k

MRR at risk



Most valuable accounts at risk

Account	Plan	Days
Atlas	Premium	67
Monroes	Premium	58
Airtalk	Premium	57
Brunswick	Premium	55
Newport S.	Premium	56
Rockay	Premium	49
H&P	Premium	47
Baltic	Premium	47
PwC	Premium	45
Roasted	Pro	62
Munich A.	Pro	59

Simple Bank Account Dashboard Examples

Elaine Marmel



Simple Bank Account Dashboard Examples:

Xero For Dummies Heather Smith, 2019-01-16 Get up and running with Xero in a flash Xero is fast emerging as the leader of online accounting software around the world representing a serious challenge to MYOB Sage and Quickbooks Xero For Dummies provides you with all the information you need to set up your own Xero account from scratch convert to Xero from another accounting software provider or start using Xero to its full potential Easy to use and deceptively powerful Xero is so much more than a spreadsheet it can help you streamline reporting manage inventory simplify accounts and organise suppliers customers and more Automatic imports intuitive coding and seamless synching across multiple business platforms gets the paperwork done quickly so you can get back to running your business This new fourth edition includes updates to the interface and coverage of the newest features including updates on generating reports working with fixed assets and managing contacts sales and payables so you can optimise your system to help your business thrive Fine tune your set up or convert from another accounting program Manage daily activities with contacts accounts sales and payables Master weekly and monthly reporting routines Track inventory monitor your business and get the most out of Xero You didn't start your business in order to become an accountant but bookkeeping is critically important to the short and long term health of your company Xero simplifies the process and saves you time and Xero For Dummies helps you leverage every feature Xero has to offer

The Startup Protocol Sally Ann Frank, 2024-03-01 There are lots of founders and lots of ideas floating around to help improve the delivery of healthcare services and positively affect the health of each of us as individuals as well as groups of patients afflicted by chronic or acute diseases Unfortunately many of these ideas never reach their full potential to improve patient outcomes or reduce costs of care Sometimes it's because the idea isn't feasible or scalable Sometimes it's because the market isn't ready or regulators aren't ready And sometimes it's just because the founder or founding team has a blind spot or two Not only do these hidden blind spots ensure their failure but in many cases with better planning or a greater more holistic understanding of the market forces the blind spot can be overcome Or better yet the founder can realize that their idea is doomed from the start and consider other better options to solve the problem they are attacking The goal of this book is to help founders and their teams identify blind spots and avoid the most common pitfalls of starting a digital health company Having spent time with founders VC companies and most importantly prospective digital health startups patterns have emerged regarding those startups that are successful and those that die an often slow and painful death While not a recipe for guaranteed success having a guidebook of sorts can help navigate the perils associated with building a digital health company and can very likely improve the odds of success The book will go through the typical life cycle of an early stage company from ideation to the first few customer deals and highlight best practices for tackling the challenges at each stage including What problem are you trying to solve And why are you trying to solve this problem Who will help you build the solution and company How will you build the solution How will you pitch your company How will you

sell your solution And what does success look like to you your stakeholders and your customers Building Dashboards with Microsoft Dynamics GP 2013 and Excel 2013 Mark Polino,2013-03-26 Follow real life step by step examples that provide the building blocks to build engaging dashboards This practical guide is all about doing Get your data open up Excel and go You don t need to be an expert to get the most out of your Dynamics GP implementation and build great looking easily maintained dashboards using Microsoft Excel If you have a working knowledge of Dynamics and Excel you ll be producing amazing dashboards in hours not days **Central Banking at the Frontier** Thammarak Moenjak,2024-09-27 With a foreword by Sethaput Suthiwartnarueput Governor of the Bank of Thailand Central Banking at the Frontier Creating a Digital Financial Landscape comprehensively explores the current digital dynamic era providing insights into the debates that define the evolving financial landscape *The FinTech Revolution* Sayed Imran Qamar,2025-04-29 FinTech a movement that s reshaping how we pay save invest and access financial services This book takes you on a journey through the transformative technologies driving this change including blockchain artificial intelligence mobile payments and decentralized finance DeFi Packed with real world examples and practical insights it explores how FinTech is breaking down barriers making financial services more accessible cutting costs and empowering communities worldwide Whether it s streamlining transactions helping small businesses thrive or creating opportunities for unbanked populations FinTech is redefining the possibilities of modern finance If you re a professional an entrepreneur or simply curious about the future of money and technology this book will guide you through the innovations that are shaping the next generation of financial systems Clear engaging and thought provoking it s your gateway to understanding how FinTech is changing the world one tap at a time **Balanced Scorecard Strategy For Dummies** Charles Hannabarger,Frederick Buchman,Peter Economy,2011-02-09 A practical easy to understand guide to Balanced Scorecard for busy business leaders The Balanced Scorecard method is an analysis technique designed to translate an organization s mission and vision statement and overall business strategies into specific quantifiable goals and to monitor the organization s performance in achieving these goals Much less technology driven then other analysis approaches it analyzes an organization s overall performance in four regards financial analysis customer service productivity and internal analysis and employee growth and satisfaction Balanced Scorecard Strategy For Dummies breaks down the basics of Balanced Scorecard in simple language with practical Dummies style guidance on getting it done This book covers all the basics of Balanced Scorecard for busy executives and managers and does it without the high price tag of most professional level Balanced Scorecard guides *GST MADE Easy eBook* Vinod Kumar (Educator), From this GST MADE Easy ebook under Indian Goods and Service Tax Law 2016 you will know and understand basic concepts of GST Law What is GST and what are its rates How to file GST return online How to pass journal entries of GST How to do accounting treatment of GST How to pass voucher entries of GST in Tally ERP 9 older and new version Except this more explanation of other concepts of GST QuickBooks Online For Dummies (UK) Elaine Marmel,2019-08-30 **Open Banking** Francesco

De Pascalis, Alan Brener, 2024-05-01 Open banking ends the proprietary control of customer information by banks and allows customers to share their banking financial data with third parties as a matter of right. It can also permit customers to allow others to remove funds directly from their bank accounts in return for goods and services. All of this is done securely with standardised application programming interfaces (APIs). Open banking has developed in different ways and with different objectives across the globe. Open Banking Global Development and Regulation examines the empowering and enabling regulations that facilitate all of this. This book compares a number of different open banking national strategies. These range from the focus of the UK and EU on enhanced competition to the more collaborative approaches in many East Asian jurisdictions. It also looks at the use of open banking for socio-economic purpose in Brazil and India. Here open banking forms part of a wider government programme to increase financial inclusion coupled with encouraging economic growth. This text will be valuable for fintech companies, policymakers and financial services regulators. Its overarching aim is to demonstrate the possibilities and challenges of open banking and how it is changing lives across the world. Strategic FUEL for

Nonprofits Charles Moore, 2024-09-27 Most nonprofits approach strategic planning in ways that take too much time and effort, focus on the wrong issues and set up the plan to be something that gathers dust on a shelf rather than being implemented. If you want a different approach, this is the book for you. This book shows nonprofit leaders and organizations how to conduct strategic planning processes that deliver both a great strategy and an organization that can drive strategic change and continually refresh its strategy. It introduces a new framework, Strategic FUEL, and shows leaders how to map their organization's strategic situation to a planning approach that addresses the most important opportunities and challenges without wasting time and effort. It also shows the actions leaders can take during strategic planning to increase the odds of successful strategy implementation. The core content of this book was developed while working with nonprofit leaders on strategic planning, so it converts the best research and ideas to practice and step-by-step guidance. This book will be a valuable resource for nonprofit CEOs and their teams, foundations looking to support their nonprofit grantees and students in nonprofit management courses and programs. While the book is focused on the nonprofit world, the lessons are also applicable to any leader trying to drive strategy effectively. **ACCOUNTING FOR PROFESSIONALS** ANATH LEE

WALES, 2024-06-14 Book Description Are you ready to unravel the mysteries of accounting and gain a comprehensive understanding of its role in the business world? Look no further than Accounting for Professionals, a comprehensive guide designed to equip you with the knowledge and skills necessary to navigate the intricacies of accounting. This book takes you on a journey through the foundations of accounting, starting with an exploration of essential Accounting Terms and the universally recognized Generally Accepted Accounting Principles (GAAP). With a clear understanding of these concepts, you'll gain confidence in your ability to interpret and analyze financial data. Delve deeper into the world of accounting as you discover the power of Double Entry Accounting and the crucial concepts of Debits and Credits. Through practical examples

and clear explanations you ll grasp the fundamental principles that form the backbone of accurate financial record keeping Journal Entries Accounts Payable and Accounts Receivable are vital components of the accounting process and this book provides a detailed examination of each Learn how to accurately record and track financial transactions ensuring a clear and comprehensive financial picture Financial Statements and Transaction Analysis hold the key to understanding a company s financial performance With this book as your guide you ll gain the skills to interpret these statements analyze financial data and make informed decisions that drive business success Job Costing and the Cost of Goods Sold are essential aspects of managing costs and profitability By mastering these concepts you ll gain valuable insights into how businesses allocate costs and determine the true value of their products or services Bookkeeping Inventory and Depreciation are critical elements of maintaining accurate financial records Discover the best practices for recording transactions tracking inventory and understanding the impact of depreciation on a company s assets Furthermore this book sheds light on the distinction between Managerial Accounting and Financial Accounting allowing you to appreciate the unique roles they play in providing insights for decision making and meeting regulatory requirements In the digital age Accounting Software has become an indispensable tool for professionals This book explores various accounting software options their features and how to leverage them to streamline financial processes and improve efficiency Finally gain mastery over the art of Budgeting and learn how to plan control and monitor financial resources effectively With the principles and techniques outlined in this book you ll be equipped to set realistic financial goals and achieve sustainable growth for your business Accounting for Professionals is your comprehensive companion in the world of accounting providing a clear and engaging exploration of essential topics Whether you re a student aspiring professional or business owner this book will empower you with the skills and knowledge to excel in the realm of accounting and financial management

QuickBooks Online Training Manual Classroom in a Book TeachUcomp ,2021-06-07 Complete classroom training manual for QuickBooks Online 415 pages and 177 individual topics Includes practice exercises and keyboard shortcuts You will learn how to set up a QuickBooks Online company file pay employees and vendors create custom reports reconcile your accounts use estimating time tracking and much more Topics Covered The QuickBooks Online Plus Environment 1 The QuickBooks Online Interface 2 The Dashboard Page 3 The Navigation Bar 4 The New Button 5 The Settings Button 6 Accountant View and Business View Creating a Company File 1 Signing Up for QuickBooks Online Plus 2 Importing Company Data 3 Creating a New Company File 4 How Backups Work in QuickBooks Online Plus 5 Setting Up and Managing Users 6 Transferring the Primary Admin 7 Customizing Company File Settings 8 Customizing Billing and Subscription Settings 9 Usage Settings 10 Customizing Sales Settings 11 Customizing Expenses Settings 12 Customizing Payment Settings 13 Customizing Time Settings 14 Customizing Advanced Settings 15 Signing Out of QuickBooks Online Plus 16 Switching Company Files 17 Cancelling a Company File Using Pages and Lists 1 Using Lists and Pages 2 The Chart of Accounts 3 Adding New Accounts 4 Assigning Account Numbers 5 Adding

New Customers 6 The Customers Page and List 7 Adding Employees to the Employees List 8 Adding New Vendors 9 The Vendors Page and List 10 Sorting Lists 11 Inactivating and Reactivating List Items 12 Printing Lists 13 Renaming and Merging List Items 14 Creating and Using Tags 15 Creating and Applying Customer Types Setting Up Sales Tax 1 Enabling Sales Tax and Sales Tax Settings 2 Adding Editing and Deactivating Sales Tax Rates and Agencies 3 Setting a Default Sales Tax 4 Indicating Taxable Non taxable Customers and Items Setting Up Inventory Items 1 Setting Up Inventory 2 Creating Inventory Items 3 Enabling Purchase Orders and Custom Fields 4 Creating a Purchase Order 5 Applying Purchase Orders to Vendor Transactions 6 Adjusting Inventory Setting Up Other Items 1 Creating a Non inventory or Service Item 2 Creating a Bundle 3 Creating a Discount Line Item 4 Creating a Payment Line Item 5 Changing Item Prices and Using Price Rules Basic Sales 1 Enabling Custom Fields in Sales Forms 2 Creating an Invoice 3 Creating a Recurring Invoice 4 Creating Batch Invoices 5 Creating a Sales Receipt 6 Finding Transaction Forms 7 Previewing Sales Forms 8 Printing Sales Forms 9 Grouping and Subtotaling Items in Invoices 10 Entering a Delayed Charge 11 Managing Sales Transactions 12 Checking and Changing Sales Tax in Sales Forms Creating Billing Statements 1 About Statements and Customer Charges 2 Automatic Late Fees 3 Creating Customer Statements Payment Processing 1 Recording Customer Payments 2 Entering Overpayments 3 Entering Down Payments or Prepayments 4 Applying Customer Credits 5 Making Deposits 6 Handling Bounced Checks by Invoice 7 Handling Bounced Checks by Expense or Journal Entry 8 Handling Bad Debt Handling Refunds 1 Refund Options in QuickBooks Online 2 Creating a Credit Memo 3 Creating a Refund Receipt 4 Refunding Customer Payments by Check 5 Creating a Delayed Credit Entering And Paying Bills 1 Entering Bills 2 Paying Bills 3 Creating Terms for Early Bill Payment 4 Early Bill Payment Discounts 5 Entering a Vendor Credit 6 Applying a Vendor Credit 7 Managing Expense Transactions Using Bank Accounts 1 Using Registers 2 Writing Checks 3 Printing Checks 4 Transferring Funds Between Accounts 5 Reconciling Accounts 6 Voiding Checks 7 Creating an Expense 8 Managing Bank and Credit Card Transactions 9 Creating and Managing Rules 10 Uploading Receipts and Bills Paying Sales Tax 1 Sales Tax Reports 2 Using the Sales Tax Payable Register 3 Paying Your Tax Agencies Reporting 1 Creating Customer and Vendor QuickReports 2 Creating Account QuickReports 3 Using QuickZoom 4 Standard Reports 5 Basic Standard Report Customization 6 Customizing General Report Settings 7 Customizing Rows and Columns Report Settings 8 Customizing Aging Report Settings 9 Customizing Filter Report Settings 10 Customizing Header and Footer Report Settings 11 Resizing Report Columns 12 Emailing Printing and Exporting Preset Reports 13 Saving Customized Reports 14 Using Report Groups 15 Management Reports 16 Customizing Management Reports Using Graphs 1 Business Snapshot Customizing Forms 1 Creating Custom Form Styles 2 Custom Form Design Settings 3 Custom Form Content Settings 4 Custom Form Emails Settings 5 Managing Custom Form Styles Projects and Estimating 1 Creating Projects 2 Adding Transactions to Projects 3 Creating Estimates 4 Changing the Term Estimate 5 Copy an Estimate to a Purchase Order 6 Invoicing from an Estimate 7 Duplicating Estimates 8 Tracking Costs for Projects 9

Invoicing for Billable Costs 10 Using Project Reports Time Tracking 1 Time Tracking Settings 2 Basic Time Tracking 3 QuickBooks Time Timesheet Preferences 4 Manually Recording Time in QuickBooks Time 5 Approving QuickBooks Time 6 Invoicing from Time Data 7 Using Time Reports 8 Entering Mileage Payroll 1 Setting Up QuickBooks Online Payroll and Payroll Settings 2 Editing Employee Information 3 Creating Pay Schedules 4 Creating Scheduled Paychecks 5 Creating Commission Only or Bonus Only Paychecks 6 Changing an Employee s Payroll Status 7 Print Edit Delete or Void Paychecks 8 Manually Recording External Payroll Using Credit Card Accounts 1 Creating Credit Card Accounts 2 Entering Charges on Credit Cards 3 Entering Credit Card Credits 4 Reconciling and Paying Credit Cards 5 Pay Down Credit Card Assets and Liabilities 1 Assets and Liabilities 2 Creating and Using Other Current Assets Accounts 3 Removing Value from Other Current Assets Accounts 4 Creating Fixed Assets Accounts 5 Creating Liability Accounts 6 Setting the Original Cost of the Fixed Asset 7 Tracking Depreciation Equity Accounts 1 Equity Accounts 2 Recording an Owner s Draw 3 Recording a Capital Investment Company Management 1 Viewing Your Company Information 2 Setting Up Budgets 3 Using the Reminders List 4 Making General Journal Entries Using QuickBooks Tools 1 Exporting Report and List Data to Excel 2 Using the Audit Log Using QuickBooks Other Lists 1 Using the Recurring Transactions List 2 Using the Location List 3 Using the Payment Methods List 4 Using the Terms List 5 Using the Classes List 6 Using the Attachments List Using Help Feedback and Apps 1 Using Help 2 Submitting Feedback 3 Extending QuickBooks Online Using Apps and Plug ins **Social Media Analytics**

Strategy Alex Gonçalves, 2017-11-12 This book shows you how to use social media analytics to optimize your business performance The tools discussed will prepare you to create and implement an effective digital marketing strategy From understanding the data and its sources to detailed metrics dashboards and reports this book is a robust tool for anyone seeking a tangible return on investment from social media and digital marketing Social Media Analytics Strategy speaks to marketers who do not have a technical background and creates a bridge into the digital world Comparable books are either too technical for marketers aimed at software developers or too basic and do not take strategy into account They also lack an overview of the entire process around using analytics within a company project They don t go into the everyday details and also don t touch upon common mistakes made by marketers This book highlights patterns of common challenges experienced by marketers from entry level to directors and C level executives Social media analytics are explored and explained using real world examples and interviews with experienced professionals and founders of social media analytics companies What You ll Learn Get a clear view of the available data for social media marketing and how to access all of it Make use of data and information behind social media networks to your favor Know the details of social media analytics tools and platforms so you can use any tool in the market Apply social media analytics to many different real world use cases Obtain tips from interviews with professional marketers and founders of social media analytics platforms Understand where social media is heading and what to expect in the future Who This Book Is For Marketing professionals social media marketing specialists analysts up to

directors and C level executives marketing students and teachers of social media analytics social media marketing *Can We Do More to Keep Savings in Our Retirement System?* United States. Congress. Senate. Committee on Health, Education, Labor, and Pensions, 2015 *The College Instructor's Guide to Writing Test Items* Michael Rodriguez, Anthony Albano, 2017-05-25 *The College Instructor's Guide to Writing Test Items* Measuring Student Learning addresses the need for direct and clear guidance on item writing for assessing broad ranges of content in many fields By focusing on multiple choice response items this book provides college instructors the tools to understand develop and use assessment activities in classrooms in a way that consistently supports learning Including dozens of example items and additional resources to support the item development process this volume is unique in its practical focus and is essential reading for instructors and soon to be educators professional development specialists and higher education researchers As teaching assessment and learning are inherently intertwined *The College Instructor's Guide to Writing Test Items* both facilitates the development of instructors own practice and improves the learning outcomes and success of students *Event Processing for Business* David C. Luckham, 2011-10-21 Find out how Events Processing EP works and how it can work for you Business Event Processing An Introduction and Strategy Guide thoroughly describes what EP is how to use it and how it relates to other popular information technology architectures such as Service Oriented Architecture Explains how sense and response architectures are being applied with tremendous results to businesses throughout the world and shows businesses how they can get started implementing EP Shows how to choose business event processing technology to suit your specific business needs and how to keep costs of adopting it down Provides practical guidance on how EP is best integrated into an overall IT strategy and how its architectural styles differ from more conventional approaches This book reveals how to make the most advantageous use of event processing technology to develop real time actionable management information from the events flowing through your company's networks or resulting from your business activities It explains to managers and executives what it means for a business enterprise to be event driven what business event processing technology is and how to use it

Powerful Money Habits Zac M. Cruz, 2020-10-13 Are you okay with not knowing what your financial life will look like in 10 years or more Are you worried about never being able to retire Would you like to create new passive income streams that make money while you sleep If so then keep reading Money is a terrible master but an excellent servant P T Barnum The reality is that most of the stress and discomfort that people experience every day is largely caused by money woes It is estimated that in most western countries up to 80% of people are tied up to some kind of debt Most people have next to nothing in savings and have no clue about how to start taking control of their finances Debt can go from being a minor inconvenience to have the potential to ruin lives in a short span of time It's crucial to know how to navigate it and get out of its vicious cycle as soon as possible Most people believe that you are either good at managing your money or you aren't and take this for granted However this couldn't be much further from the truth In this book you'll discover How to get out of all

the debt you've accumulated in record time How to effortlessly identify which type of spending is causing you the most damage An stress free way to begin investing and multiplying your money without spending much time or mental energy How to manage your money like a pro even if you find numbers scary How to create a safety net around you that will act as a powerful defense against unexpected financial troubles And much more Learning how to create powerful new habits that will support your financial goals can be easy if you have the right road map It's not rocket science and you'll wonder why you didn't start sooner It can also have lots of positive benefits that will spill over into multiple areas of your life As with anything money related time is your best ally Start making smart decisions and begin to multiply your money today by scrolling up and clicking the BUY NOW button at the top of this page

Teaching Ambition; Growing your Tuition-Based Business

Tara Pickford, 2022-01-19 Teaching Ambition is a must have guide for anyone at the beginning of owning a performing arts studio and a call to action for established businesses to discover best practices Customer service staffing e-commerce finances marketing and so much more Teaching Ambition is a bible for anyone who runs a tuition based business Jay T Schramek Owner of Toronto Dance Teacher Expo Dance Attack Competitions and Tap Shoes Canada Have you dreamt of running your own school from the first time you tied your ballet shoes played or sang a note in music or earned a karate belt Of course as teachers and instructors you know your craft But running an academy takes a different set of skills and not every business consultant understands your unique industry In Teaching Ambition Tara Pickford shares what she has learned from the trenches Tara grew her performing arts franchise to three locations before she realized that it was too soon to scale up without the right systems in place Drawing from 25 years of experience from watching staff take her clients to another studio to getting hit by the figurative bus in her personal life she offers valuable guidance and powerful exercises to help you Put the systems in place to succeed Surround yourself with the best team Get on top of your finances for better profit control Create a culture based on your values And more If you own a tuition based business or aspire to run a school or studio one day Teaching Ambition will provide you with the accurate practical and industry specific tools you need to make your vision a reality

Copy-Paste Cashflow Lucas Owen Taylor, 2025-08-01 Transform Your Creativity into a Steady Stream of Income Imagine building a business that works for you around the clock even while you sleep This book reveals how to tap into the lucrative world of digital templates turning simple creations into lasting revenue without the usual hustle of traditional entrepreneurship With accessible guidance tailored for beginners you'll discover how to craft and sell digital products on popular platforms like Etsy and Gumroad Step by step you'll learn how to design eye catching templates using tools like Canva and Notion no advanced design skills needed Plus harness the power of AI with ChatGPT to spark fresh ideas and create content that sells But it doesn't stop at creation From setting up your shop and establishing a memorable brand to pricing your products for maximum profitability every aspect of the business is broken down into manageable actionable steps You'll also uncover marketing strategies that don't require a big budget helping you grow organic traffic through social

media email lists and partnerships with influencers Inside you ll find expert tips on optimizing product listings for visibility automating customer delivery and navigating legal essentials everything you need to build a professional trustworthy presence Whether you want a flexible side hustle or a full time venture this book offers proven techniques to scale your business and stay motivated through the ups and downs Ready to turn your ideas into a reliable passive income stream Dive in and start creating digital templates that sell setting the stage for financial freedom and creative fulfillment **The Future of Retail Banking** J. DiVanna,2003-11-06 This book arises from an event on the future of banking which included leading figures in the industry It addresses current trends influencing competition including globalization market structure technology and demographics and how these will impact upon companies and their organization business opportunities revenue streams branding and customer behaviour It will also show banks how to develop strategic initiatives for future competition This will represent essential thinking for the banking and financial services industry

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