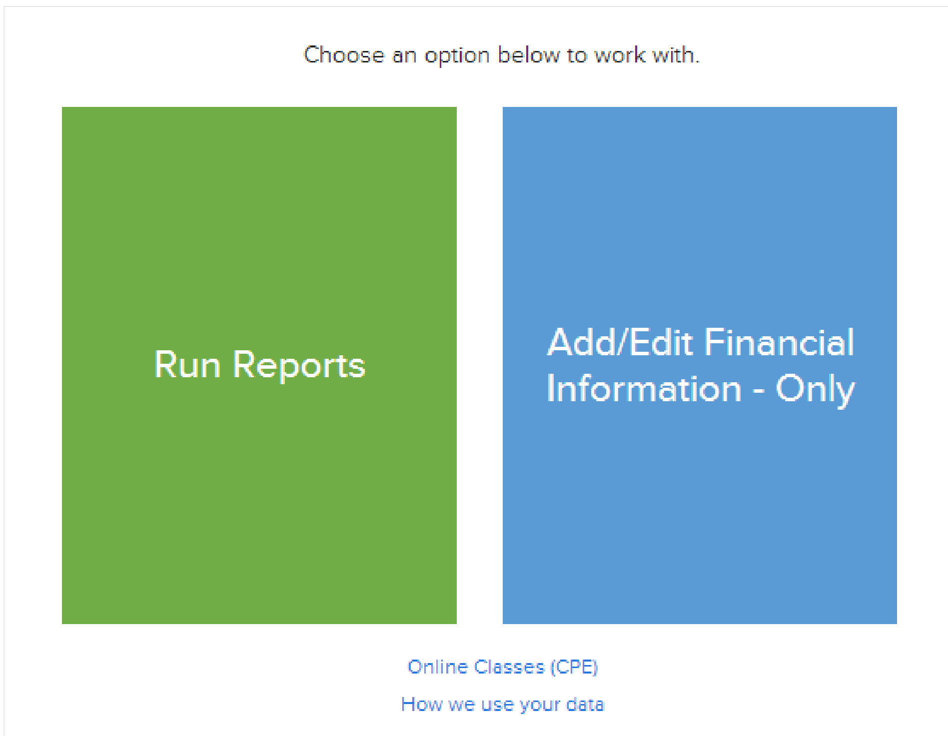
Welcome to the new profitcents®

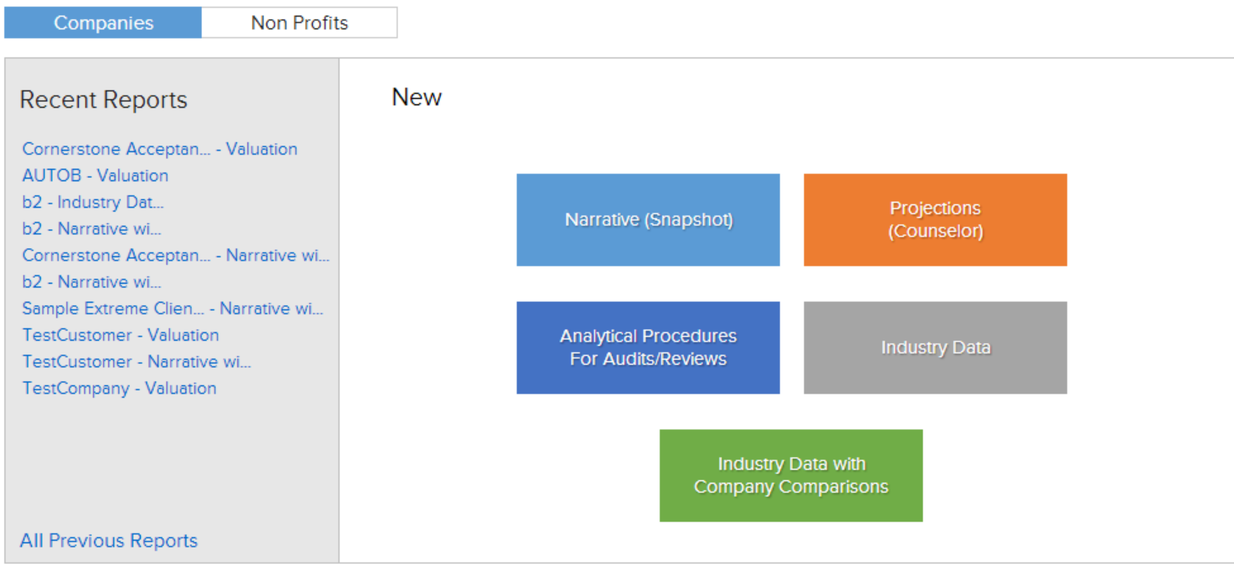
5 **ways** to faster reports

1. Quick access to your clients and reports

From the home page, access recent reports with the client screen or choose a recent client to work with. If you are not ready to run a report and want to just enter data, choose the **Add/Edit Financial Information – Only** option.

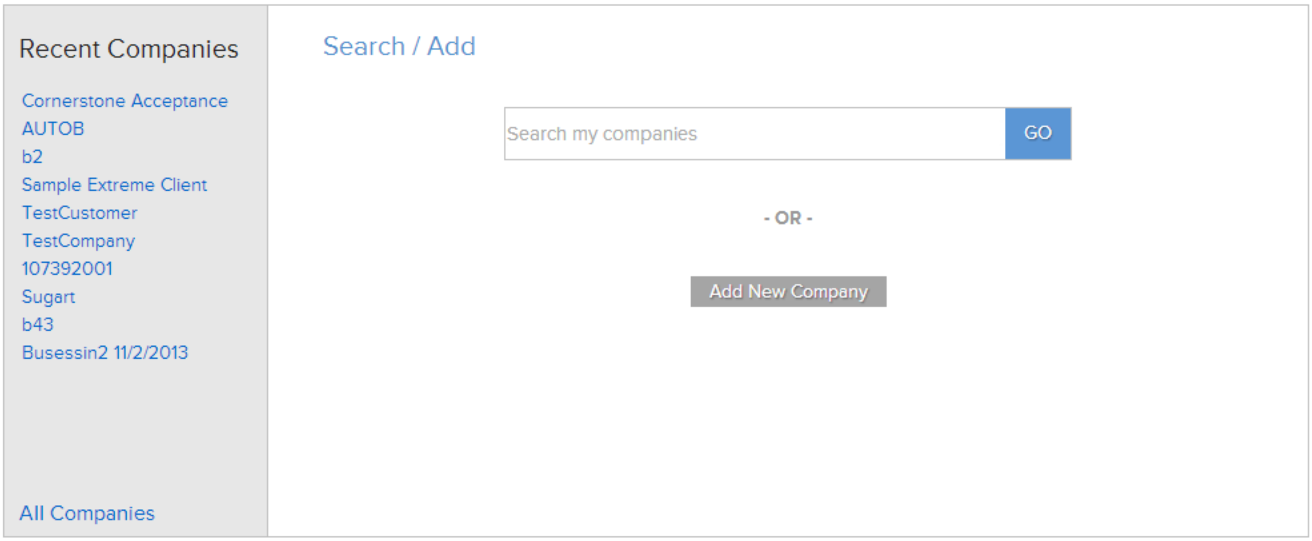


It’s now easier to run a report. You can either access your recent and previous reports or you can choose a new type of report to get started.



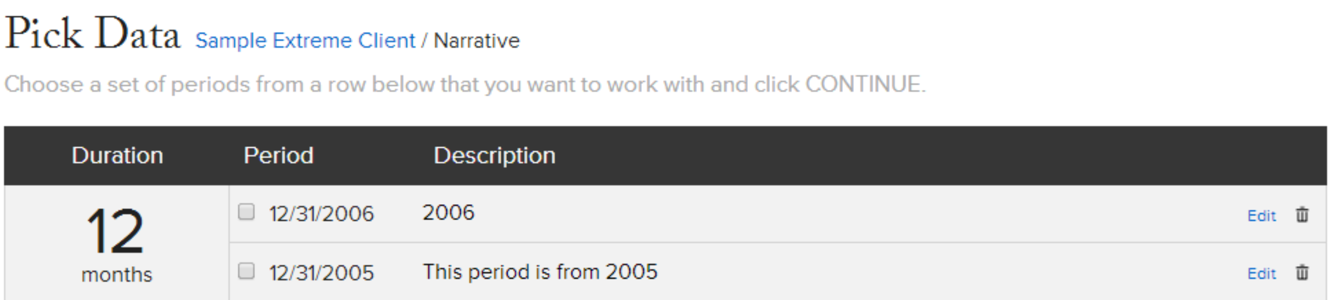
TIP: Reports have task-based names to easily identify the appropriate report, but the report names that you are familiar with (Snapshot and Counselor) are still listed for your convenience.

Have a lot of clients? Quickly accessing a specific company is now easier too. Just type the name of the client that you are looking for or choose one that you have recently worked with. At this point, you can also add a new company.



2. New way to organize your periods of data

Your data is now organized by each unique period.

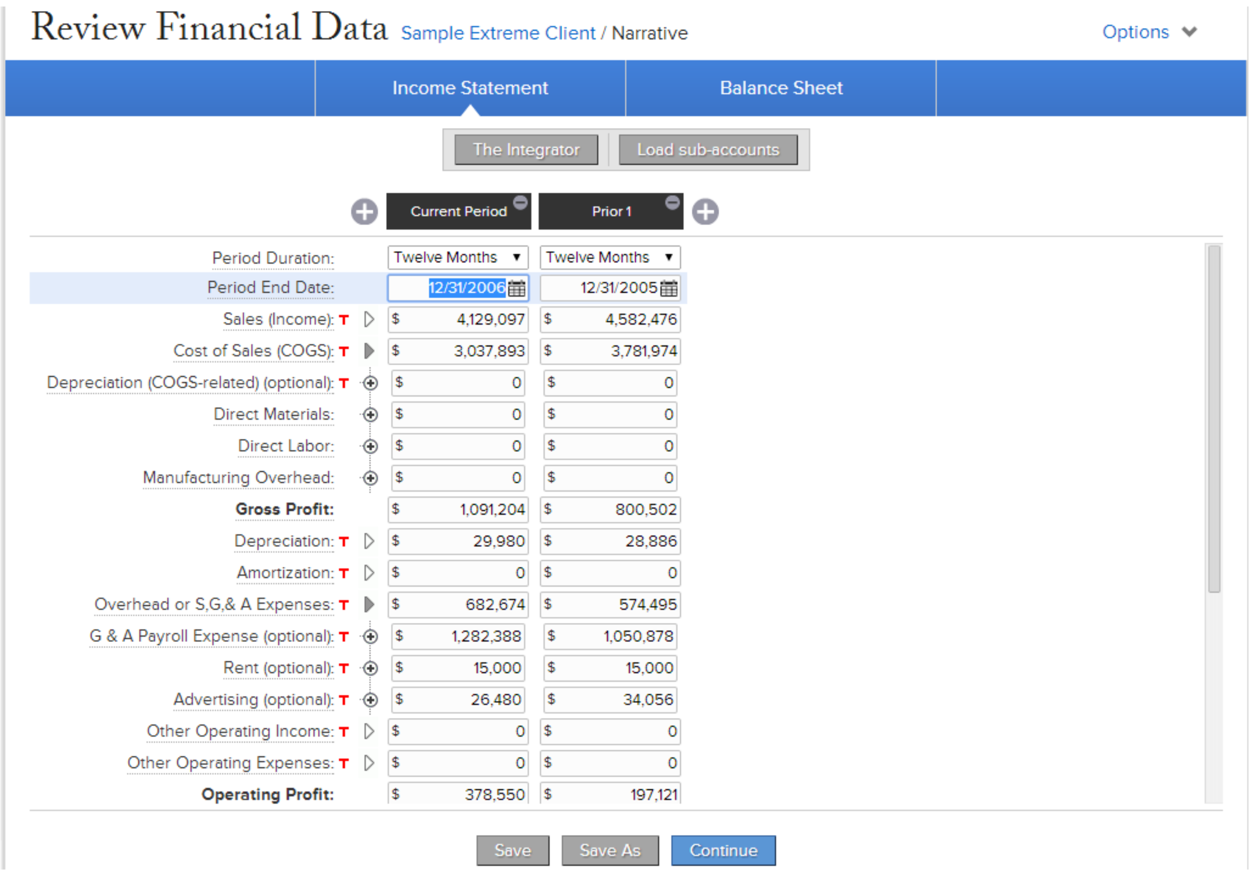


You can even have multiple periods with the same period end data for quick preliminary-versus-final views of your data. If you're an existing customer, you no longer need to sort through hundreds of reports to identify which report contains what data – what a time saver!

TIP: If you can't find the specific period that you are looking for, follow the prompt and run a previously run report.

3. Entering Data

Whether you are new to the software or have been using ProfitCents for years (thank you!), it should be straight forward to enter data.

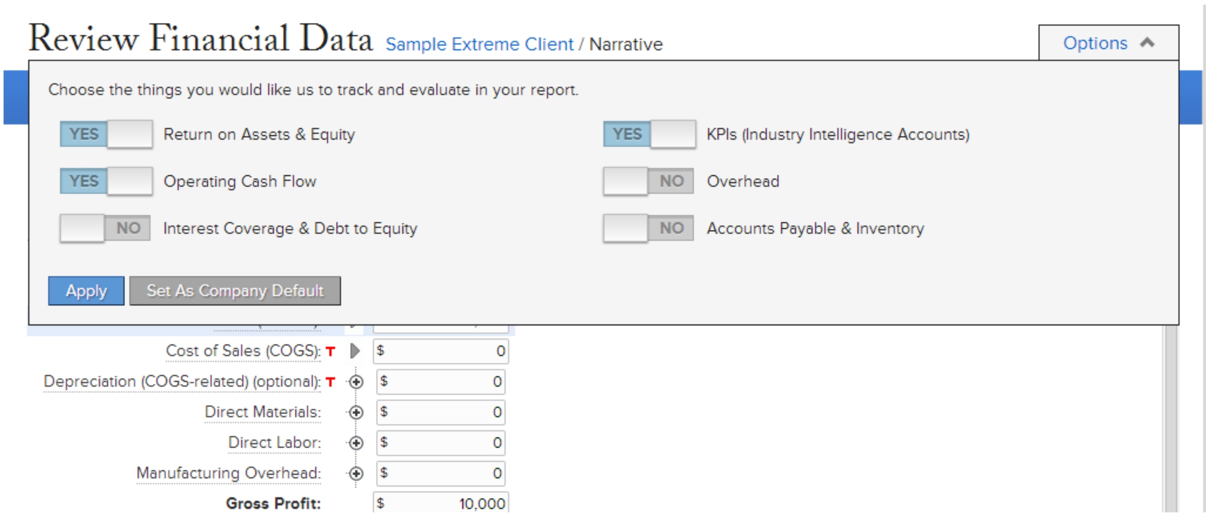


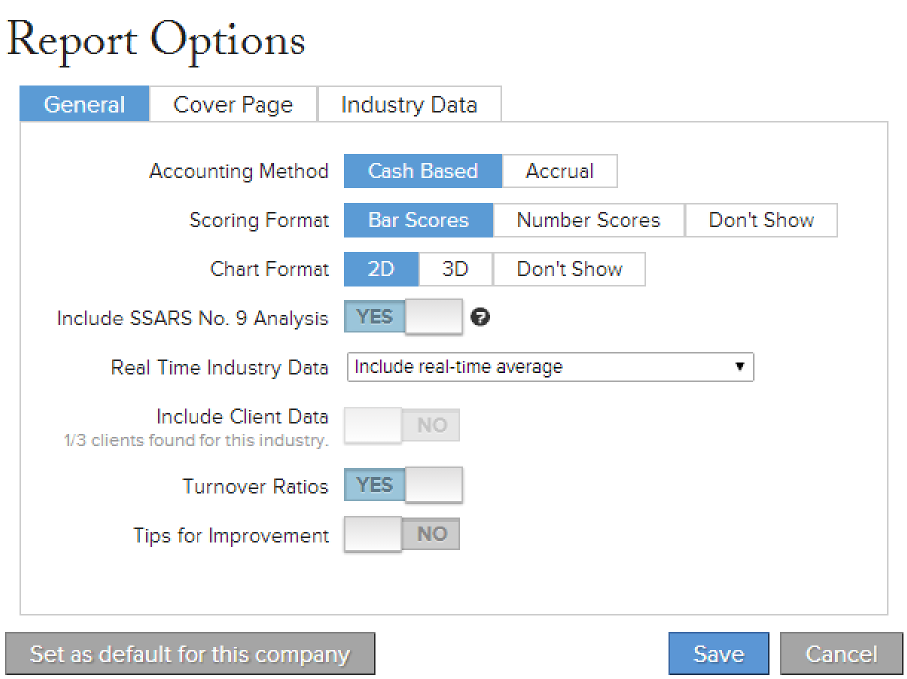
Add, remove, or even annualize periods directly from this screen. Have a lot of data? Save your work as you go with the easy-to-access **Save** button.

> TIP: Use the **Save As** button to run and save different financial scenarios, especially for Analytical Procedures for Audit/Review reports.

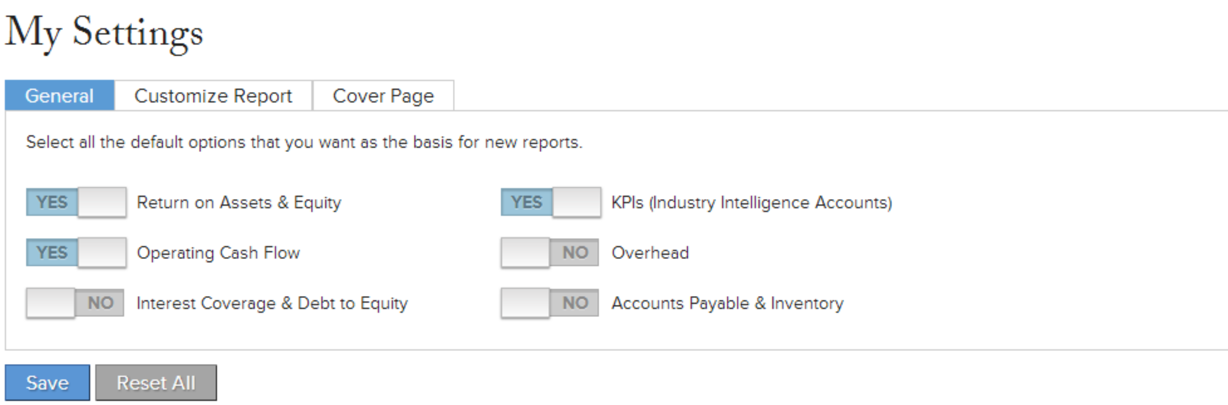
4. Customize your reports

Choose what you want in your reports. If you don't want overhead, we won't ask you for it. You can mix-and-match to customize reports for your clients as needed.





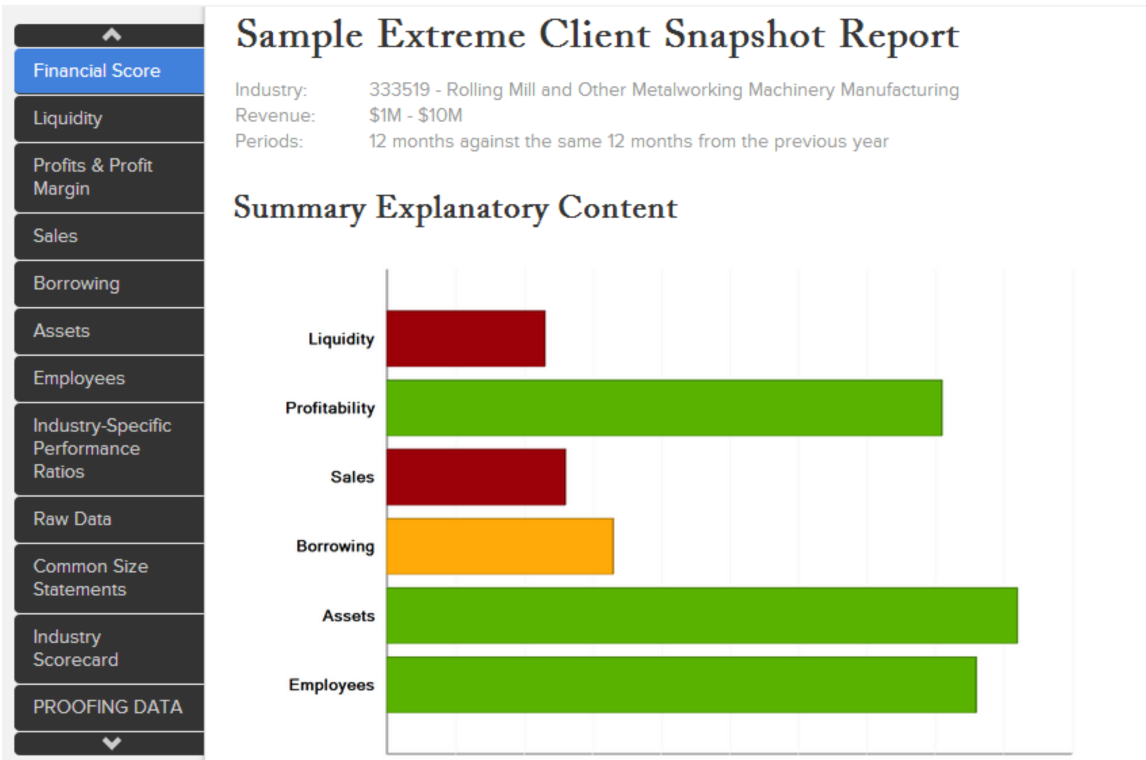
Have specific things that you always want to track and evaluate? ProfitCents has made settings available to you so that you can set defaults and have the software personalized to your needs.



TIP: Customize reports and save your settings as defaults for individual clients.

5. Get to the insights more quickly

ProfitCents reports also have been updated to allow you to find the exact data to provide your client with useful information.



In a quick glance, you can find the specific area that you want to discuss and easily drill down to the narrative and tips for improvement. The reports have also been professionally designed for the modern age and will help your firm stand out against other clients. Better yet, take a **tablet** with you and show your client their strengths and weaknesses in person.

TIP: Click on the plus and minus symbols to show or hide various sections of the report.

Learn More

- Check out our new Help Center page online to explore resources and find the answers to common questions.
- Looking for a detailed walkthrough? Access our user guide for existing ProfitCents users.
- As always, if you ever get stuck, you can reach us at consulting@sageworks.com or at 866-603-7029 option 1.

We hope you enjoy working in the new and enhanced

Sincerely,

The ProfitCents Team