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REVIEWS

2018 Review of PlanGuru

Mary Girsch-Bock • Feb. 19, 2018



PlanGuru

www.planguru.com

From the 2018 reviews of Cash Management systems.

PlanGuru is a cloud-based budgeting and forecasting software. PlanGuru is a good fit for businesses, nonprofits, and accounting professionals. Along with budget and forecasting, PlanGuru also offers excellent business and financial analytics.

During setup, users can choose the correct structure for their business or organization, with the ability to further customize system reports and analytics to reflect the chosen business type. PlanGuru will also be introducing a number of significant product enhancements that are due to hit the market at the end of January.

PlanGuru offers excellent cash management and forecasting, including the ability to create an unlimited number of analyses for each company or client. To make setup even easier, users can import up to five years of data directly into PlanGuru from a variety of third-party applications including QuickBooks, QuickBooks Online, and Xero. Users can also easily import Microsoft Excel spreadsheets directly into the product as well. PlanGuru offers more than 20 cash forecasting methods, along with the ability to create custom forecasting methods if desired. Users can also choose to use non-financial data when creating a forecast if desired.

Along with cash forecasting, PlanGuru also offers flexibly budgeting capability, with users able to create a single company budget or a complex operating budget that spans multiple departments and locations. Like forecasts, budgets can be created for up to ten years, if desired. PlanGuru posts all transactions in real time, so dashboards, analytics and reports will always reflect the most current data available.

For those interested in advance analytics, PlanGuru Analytics is a web based dashboard that is designed to integrate seamlessly with PlanGuru. PlanGuru Analytics offers easy access to key performance indicators, and provides users with detailed financial performance for their business or their clients. Security levels are set separately for PlanGuru Analytics, so access can be provided to clients, co-workers and outside associates if desired. PlanGuru also contains a Business Valuation module that allows users to create business valuation using a variety of accepted valuation methods.

PlanGuru offers a security option, which admins can activate and set access levels for each system user, with users provided or denied access to options such as Allow Access, Historical Data, Update Budget, Import Data, and Print and Export, along with several other options. Security in PlanGuru Analytics can be set for three varying levels; Subscription Administrative User, Company Administrative User, and Company Regular User.

Along with forecasting and budgeting, PlanGuru also offers two add-on options; PlanGuru Launch, which assists new users with product implementation and PlanGuru Analyst, which acts as an ongoing service, providing business owners with budget building, maintaining, and forecasting, along with ongoing reporting.

PlanGuru offers an excellent selection of reports, including financial statements and ratios, balance sheets, breakeven analysis, assumptions, and revenue and expense reports. All PlanGuru reports offer drill down capability for both totals and report categories. PlanGuru also offers an advanced reporting add-in that provides users

with the ability to create advanced reports in Excel using data in PlanGuru. All PlanGuru reports can be exported to both Microsoft Word and Excel, as well as saved as a PDF if desired.

PlanGuru offers easy integration with a variety of third-party accounting applications including QuickBooks, QuickBooks Online, Xero, and Microsoft Word and Excel, with the ability to share information between applications via import and export functionality.

Designed for businesses that want to be proactive about cash management, budgeting and analytics, PlanGuru is suitable for businesses, nonprofits and accounting professionals alike. A free-30-day trial of the program is available for those interested. Currently, PlanGuru is \$99.00 per month, with each additional user running \$29.00.

Overall Rating – 5 Stars

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