



Import-Export Company

Trade international with us

Business Plan [YEAR]



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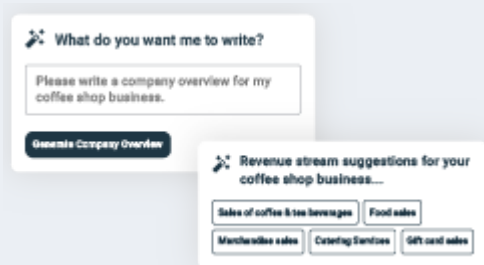
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1.

Executive Summary

Business Overview

Products And Services

The Market

Financial Considerations

Objectives

Mission

Keys to Success



REMEMBER

Before you think about how to start an Import/Export services, you must create a detailed Import Export business plan. It will not only guide you in the initial phases of your startup but will also help you l

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Ex :: Walter

Walter Import/Export is a start-up with a mission to provide complete import/export brokerage solutions. This import/export business will be run by owner Ramon Walter as a Limited Liability Company. Its services include purchase contracts, shipping, warehouse

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Business Overview

Ex :: Walter

Walter Imports will be a limited liability partnership registered in the state of Delaware for tax purposes. Its founder is Mr. Ramon Walter, a former master distributor with Fisher-Mills. Mr. Walter has brought together a highly respected group of individuals w

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Products And Services

Ex :: Walter

Walter offers complete import/export brokerage services plus inventory consulting services. As mentioned previously, this includes the following:

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The Market

Ex :: Walter

Walter will be concentrating on servicing just two types of clients, the gift shops of Leavenworth, Washington, and the farmers of the Puget Consumers Co-op (PCC). For both market segments, we have secured exclusive contracts or endorsements.

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Financial Considerations

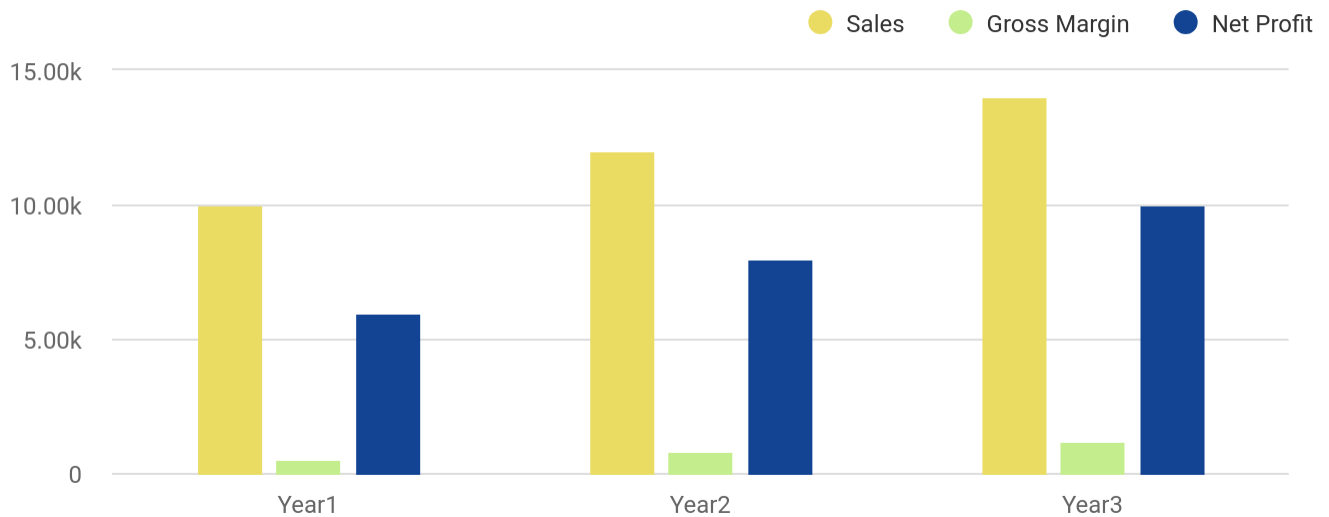
Ex :: Walter

Start-up assets required include expenses and cash needed to support operations until revenues reach an acceptable level. Most of the company's liabilities will come from outside private investors and management investment, however, we have obtained

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3 Year profit forecast



Financial Year	Sales	Gross Margin	Net Profit
Year1	10,000	500	6,000
Year2	12,000	800	8,000
Year3	14,000	1,200	10,000

Objectives

Ex :: Walter

The three-year goals for Walter Imports are the following:

- Achieve break-even by year 2.

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Mission

Ex :: Walter

It is the mission of Walter Imports to provide complete import/export consultation and brokerage services including purchase contracts, shipping, warehousing, and delivery. The company will concentrate on special and cultural imports from Germany.

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Keys to Success

Ex :: Walter

Walter Imports keys to long-term and profitability are as follows:

- Differentiate our services to our niche clients so that they realize that we are better able

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2.

Business Summary

Overview

Start-up Summary

Funding Required

Company Ownership

Overview

Ex :: Walter

Walter Imports will be a limited liability partnership registered in the state of Delaware for tax purposes. Its founder is Mr. Ramon Walter, a former master distributor with Fisher-Mills. Mr. Walter has brought together a highly respected group of individuals w

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Start-up Summary

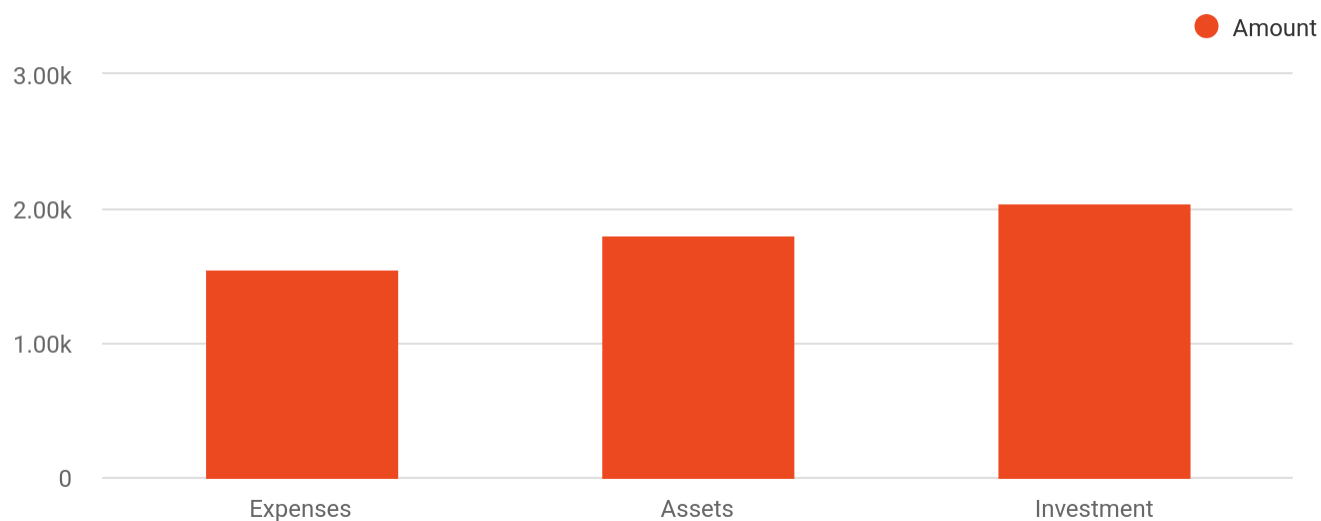
Ex :: Walter

Start-up assets required include expenses and cash needed to support operations until revenues reach an acceptable level. Most of the company's liabilities will come from outside private investors and management investment, however, we have obt

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Startup cost



Cost distribution	Amount
Expenses	1,550
Assets	1,800
Investment	2,050

Funding Required


START-UP FUNDING	AMOUNT
Start-up Expenses to Fund	\$21,200
Start-up Assets to Fund	\$63,550
TOTAL FUNDING REQUIRED	\$84,750
Assets	
Non-cash Assets from Start-up	\$25,000
Cash Requirements from Start-up	\$38,550
Additional Cash Raised	\$0
Cash Balance on Starting Date	\$38,550
TOTAL ASSETS	\$63,550
Liabilities and Capital	
Liabilities	

START-UP FUNDING	AMOUNT
Current Borrowing	\$9,000
Long-term Liabilities	\$12,000
Accounts Payable (Outstanding Bills)	\$2,000
Other Current Liabilities (interest-free)	\$8,000
TOTAL LIABILITIES	\$31,000
Capital	
Planned Investment	
Mr. Ramon Walter	\$15,000
Ms. Hannah Mills	\$13,000
Mr. Steve Iltheus	\$13,000
Mr. Pierce Bolm	\$5,000
Others	\$7,750
Additional Investment Requirement	\$0
TOTAL PLANNED INVESTMENT	\$53,750
The loss at Start-up (Start-up Expenses)	(\$21,200)
TOTAL CAPITAL	\$32,550
TOTAL CAPITAL AND LIABILITIES	\$63,550
Total Funding	\$84,750

Company Ownership

Ex :: Walter

The company will have a number of outside private investors who will own 27% of the company's shares. The rest will be owned by the senior management including Mr. Ramon Walter, (25%), Ms. Hannah Mills (20%), Mr. Steve Iltheus (20%), and Mr.

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3.

Products and Services

Services



REMEMBER

Before starting an Import Export Business, you must take many things into consideration such as you must consider what types of import/export services will you be providing to your customers. De

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Ex :: Walter

Walter offers complete import/export brokerage services plus inventory consulting services. As mentioned previously, this includes the following:

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Services



Supplier/buyer identification



Purchasing process contracting and consulting



Shipping setup



Warehousing arrangements



Delivery

Ex :: Walter

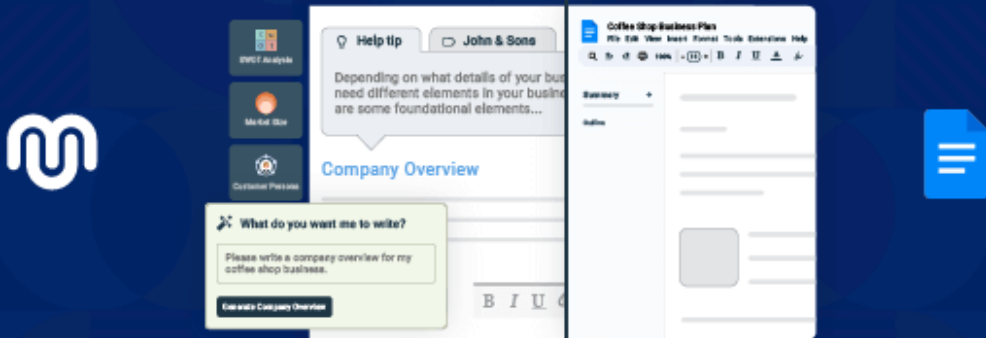
It must be noted that Walter does not possess any warehousing facilities and intends to outsource this particular service. This means that we will have virtually no variable costs associated with unit sales.

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4.

Market Analysis

Service Business Analysis

Market Segmentation

Competition and Buying Patterns



REMEMBER

The most important component of an effective import-export business plan is its accurate marketing analysis. If you are starting on a smaller scale, you can do the market analysis yourself by taking help f

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Ex :: Walter

Walter will be concentrating on servicing just two types of clients, the gift shops of Leavenworth, Washington, and the farmers of the Puget Consumers Co-op. For both market segments, we have secured exclusive contracts or endorsements that

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Service Business Analysis

Ex :: Walter

Leavenworth sits in one of the most beautiful areas of Washington State. The area was settled in the 1860s, but it wasn't until the end of the century that the town began to blossom with the arrival of the rail line. The Great Northern Railway Company's tracks th

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Imports

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Ex :: Walter

Walter has made arrangements to export produce from member farms established by the Puget Consumers Co-op Farmland Fund. The Fund works to secure and preserve threatened farmland in Washington State and move it into organic production. Th

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Exports

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Market Segmentation

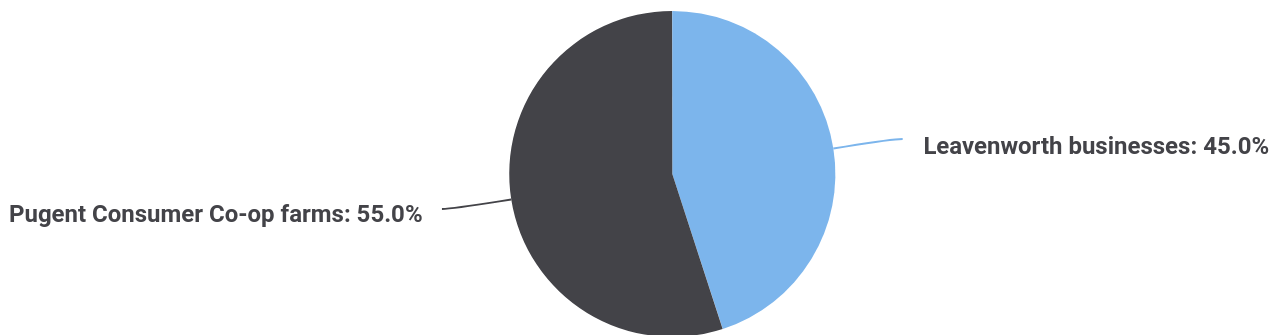
Ex :: Walter

Walter intends to be a small import/export company focused on clients serving a niche market. Having secured a very advantageous contract with PCC and gained the endorsement of the Leavenworth city council, we plan to focus exclusively on these markets.

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Market Analysis



Segments

Market share

Leavenworth businesses	45
Pugent Consumer Co-op farms	55

Potential Customers	Growth	Year 1	Year 2	Year 3	Year 4	Year 5	CAGR
Leavenworth businesses	1%	34	34	34	34	34	0.00%
Pugent Consumer Co-op farms	5%	72	76	80	84	88	5.14%
Total	3.58%	106	110	114	118	122	3.58%

Competition and Buying Patterns

Ex :: Walter

The competition includes all potential importing firms that serve small enterprises such as farms and specialty gift shops. Practically speaking, this means the largest import/export firms such as Fisher-Mills, Eagle Distributing, and other large, nationwide co

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Competition

Start writing here..

Ex :: Walter

Companies usually enter into contracts with import/export firms based on a firm's reputation for professionalism and service. With no proven track record, a star-up import/export company obtains a "good reputation" through its personnel, people who have ex

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Buying patterns and needs

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5.

Strategy and Implementation Summary

Sales Strategy

Marketing Strategy



REMEMBER

After identifying the market demand, market trends, and the potential customers of the startup, the next step is to define an effective strategy for attracting those customers. Like marketing analysis

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Ex :: Walter

Our firm's business strategy is to enter into a focused or niche market where it can offer a higher standard of service to its specialized clients. This will allow us to charge slightly higher fees to our clients for these differentiated services.

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Sales Strategy

Ex :: Walter

Walter intends to develop sales by establishing close contact with potential clients. We will begin by offering a free consultation in terms of overall cost, service, and delivery. In addition, we intend to promote our management team's extensive experience b

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Ex :: Walter

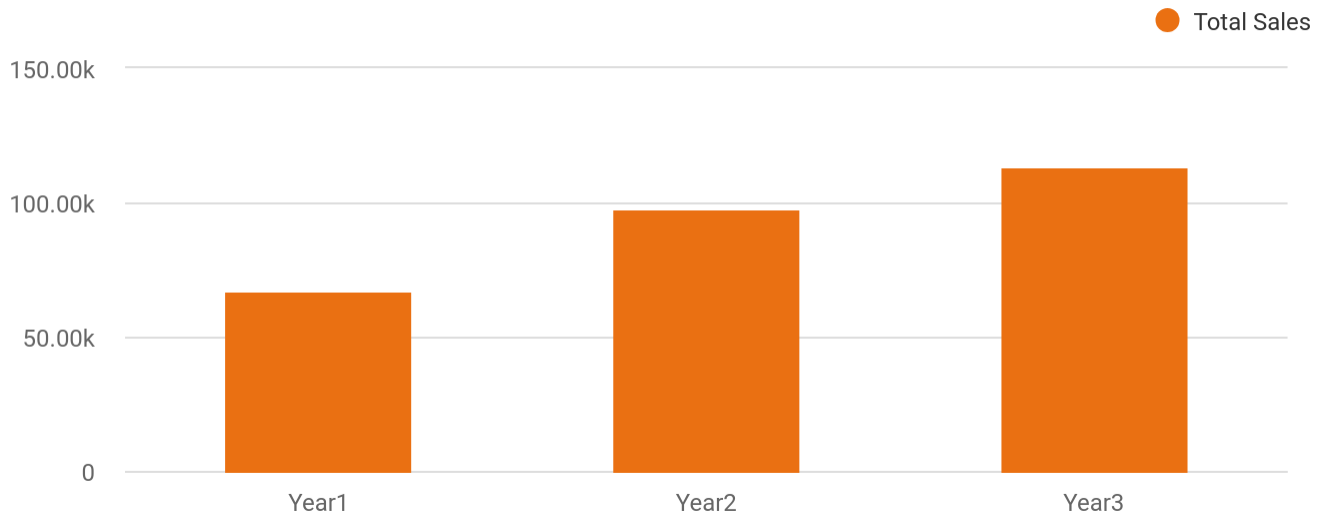
Sales are based on the various contracts we anticipate acquiring in the two market segments. Revenues consist of a commission rate charged to our clients based on the dollar amount of goods moved and include projected average costs plus an undisclosed

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Sales Forecast

Start writing here..

Sales Yearly



Financial Year	Total Sales
Year1	66,840
Year2	97,760
Year3	113,402

Marketing Strategy

Ex :: Walter

Walter intends to leverage its contacts with the Leavenworth city council and the Puget Consumers Co-op in order to draw in new clients. The city council works very closely with local businesses in facilitating all aspects of business management in order to...

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6.

Management Summary

Personnel

Ex :: Walter

Company officers include our President, Mr. Ramon Walter, our head of exports Ms. Hannah Mills, and our head of imports, Mr. Steve Iltheus.


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Personnel

Ex :: Walter

Walter's management brings to the company strong capabilities in all aspects of trade relations, logistics, contracting, and selling.

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PERSONNEL PLAN	YEAR 1	YEAR 2	YEAR 3
Mr. Ramon Walter - President	\$36,000	\$36,000	\$45,000
Mrs. Hannah Mills	\$36,000	\$36,000	\$45,000
Mr. Steve Iltheus	\$24,000	\$36,000	\$36,000
Other	\$0	\$0	\$0
TOTAL PEOPLE	3	3	3
Total Payroll	\$96,000	\$108,000	\$126,000

7.

Financial Plan

Important Assumptions

Break-even Analysis

Projected Profit and Loss

Projected Cash Flow

Projected Balance Sheet

Business Ratios



REMEMBER

The last component of an Import Export business plan is an in-depth financial plan. The financial plan crafts a detailed map of all the expenses needed for the startup and how these expenses will

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Ex :: Walter

Our financial plan anticipates one year of negative profits as we gain sales volume. We have enough investment to cover these losses and have an additional credit line available if sales do not match predictions.

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Important Assumptions

We are assuming approximately 50% sales on credit and average interest rates of 10%. These are considered to be conservative in case our predictions are erroneous. Since Walter is an import/export broker, the firm has no variable costs associated with it.

	Year 1	Year 2	Year 3
Plan Month	1	2	3
Current Interest Rate	10,00%	11,00%	12,00%
Long-term Interest Rate	10,00%	10,00%	10,00%
Tax Rate	26,42%	27,76%	28,12%
Other	0	0	0

Brake-even Analysis

Monthly Units Break-even	5530
Monthly Revenue Break-even	\$159 740
Assumptions:	
Average Per-Unit Revenue	\$260,87
Average Per-Unit Variable Cost	\$0,89
Estimated Monthly Fixed Cost	\$196 410

Projected Profit and Loss

	2024	2025	2026
Revenue	\$1,098,000.25	\$1,888,312.63	\$3,296,448.22
Import Services for Small Shops	\$955,040	\$1,715,140	\$3,080,200
Unit Sales	478	858	1,540
Unit Price	\$2,000	\$2,000	\$2,000
Export Services for Start-Up Farms	\$70,960.25	\$101,172.63	\$144,248.22
Consulting for Trade Processes	\$72,000	\$72,000	\$72,000
Total Hours	480	480	480
Hourly Price	\$150	\$150	\$150
Cost Of Sales	\$76,749.22	\$123,243.31	\$202,976.57
General Costs	\$76,749.22	\$123,243.31	\$202,976.57
Import-Related Costs	\$69,653.26	\$113,126.17	\$188,551.99
Shipping and Handling Costs	\$13,412.03	\$17,009.57	\$21,572.33
Custom Duties	\$54,900.01	\$94,415.63	\$164,822.42
Transportation Fees	\$1,341.22	\$1,700.97	\$2,157.24
Export-Related Costs	\$7,095.96	\$10,117.14	\$14,424.58
Packaging Costs	\$7,095.96	\$10,117.14	\$14,424.58
Revenue Specific Costs	\$0	\$0	\$0
Personnel Costs (Direct Labor)	\$0	\$0	\$0
Gross Margin	\$1,021,251.03	\$1,765,069.32	\$3,093,471.65

	2024	2025	2026
Gross Margin (%)	93.01%	93.47%	93.84%
Operating Expense	\$1,209,600.01	\$1,295,310.23	\$1,405,601.98
Payroll Expense (Indirect Labor)	\$1,088,700	\$1,133,466.60	\$1,171,866.56
Management Team	\$271,200	\$283,608	\$296,590.32
CEO	\$156,000	\$163,800	\$171,990
Operations Manager	\$115,200	\$119,808	\$124,600.32
Sales and Marketing Team	\$577,500	\$594,825	\$612,669.96
Sales Executive	\$375,000	\$386,250	\$397,837.80
Marketing Specialist	\$202,500	\$208,575	\$214,832.16
Operations and Support Team	\$240,000	\$255,033.60	\$262,606.28
Logistics	\$240,000	\$247,200	\$254,616
Administrative Staff	\$0	\$7,833.60	\$7,990.28
General Expense	\$120,900.01	\$161,843.63	\$233,735.42
Office and Administration	\$42,000	\$42,900	\$43,819.80
Office Rent	\$36,000	\$36,720	\$37,454.40
Utilities	\$6,000	\$6,180	\$6,365.40
Marketing and Advertising	\$66,900.01	\$106,655.63	\$177,307.22
Digital Marketing	\$54,900.01	\$94,415.63	\$164,822.42
Print Advertising	\$12,000	\$12,240	\$12,484.80
Miscellaneous and Operational	\$12,000	\$12,288	\$12,608.40
Office Supplies	\$3,600	\$3,636	\$3,696.84
Legal and Compliance	\$8,400	\$8,652	\$8,911.56
Bad Debt	\$0	\$0	\$0

	2024	2025	2026
Amortization of Current Assets	\$0	\$0	\$0
EBITDA	(\$188,348.98)	\$469,759.09	\$1,687,869.67
Additional Expense	\$19,953.86	\$16,085.51	\$11,978.57
Long Term Depreciation	\$9,660	\$9,660	\$9,660
Gain or loss from Sale of Assets	\$0	\$0	\$0
EBIT	(\$198,008.98)	\$460,099.09	\$1,678,209.67
Interest Expense	\$10,293.87	\$6,425.51	\$2,318.56
EBT	(\$208,302.84)	\$453,673.58	\$1,675,891.10
Income Tax Expense / Benefit	\$0	\$0	\$0
Total Expense	\$1,306,303.09	\$1,434,639.05	\$1,620,557.12
Net Income	(\$208,302.84)	\$453,673.58	\$1,675,891.10
Net Income (%)	(18.97%)	24.03%	50.84%
Retained Earning Opening	\$0	(\$278,302.84)	\$155,370.74
Owner's Distribution	\$70,000	\$20,000	\$20,000
Retained Earning Closing	(\$278,302.84)	\$155,370.74	\$1,811,261.84

Projected Cash Flow

	2024	2025	2026
Cash Received	\$1,098,000.25	\$1,888,312.63	\$3,296,448.22

	2024	2025	2026
Cash Paid	\$1,296,643.09	\$1,424,979.05	\$1,610,897.12
COS & General Expenses	\$197,649.23	\$285,086.94	\$436,711.99
Salary & Wages	\$1,088,700	\$1,133,466.60	\$1,171,866.56
Interest	\$10,293.87	\$6,425.51	\$2,318.56
Sales Tax	\$0	\$0	\$0
Income Tax	\$0	\$0	\$0
Net Cash From Operations	(\$198,642.84)	\$463,333.58	\$1,685,551.10
Assets Sell	\$0	\$0	\$0
Assets Purchase	\$70,000	\$0	\$0
Net Cash From Investments	(\$70,000)	\$0	\$0
Amount Received	\$350,000	\$0	\$0
Loan Received	\$200,000	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$150,000	\$0	\$0
Amount Paid	\$132,718.82	\$86,587.17	\$90,694.01
Loan Capital	\$62,718.81	\$66,587.17	\$70,694.02
Dividends & Distributions	\$70,000	\$20,000	\$20,000
Net Cash From Financing	\$217,281.18	(\$86,587.17)	(\$90,694.01)
Summary			
Starting Cash	\$0	(\$51,361.66)	\$325,384.75

	2024	2025	2026
Cash In	\$1,448,000.25	\$1,888,312.63	\$3,296,448.22
Cash Out	\$1,499,361.91	\$1,511,566.22	\$1,701,591.13
Change in Cash	(\$51,361.66)	\$376,746.41	\$1,594,857.09
Ending Cash	(\$51,361.66)	\$325,384.75	\$1,920,241.84

Projected Balance Sheet

	2024	2025	2026
Assets	\$8,978.34	\$376,064.75	\$1,961,261.84
Current Assets	(\$51,361.66)	\$325,384.75	\$1,920,241.84
Cash	(\$51,361.66)	\$325,384.75	\$1,920,241.84
Accounts Receivable	\$0	\$0	\$0
Inventory	\$0	\$0	\$0
Other Current Assets	\$0	\$0	\$0
Long Term Assets	\$60,340	\$50,680	\$41,020
Gross Long Term Assets	\$70,000	\$70,000	\$70,000
Accumulated Depreciation	(\$9,660)	(\$19,320)	(\$28,980)
Liabilities & Equity	\$8,978.35	\$376,064.76	\$1,961,261.84
Liabilities	\$137,281.19	\$70,694.02	\$0
Current Liabilities	\$66,587.17	\$70,694.02	\$0
Accounts Payable	\$0	\$0	\$0
Income Tax Payable	\$0	\$0	\$0
Sales Tax Payable	\$0	\$0	\$0
Short Term Debt	\$66,587.17	\$70,694.02	\$0
Long Term Liabilities	\$70,694.02	\$0	\$0

	2024	2025	2026
Long Term Debt	\$70,694.02	\$0	\$0
Equity	(\$128,302.84)	\$305,370.74	\$1,961,261.84
Paid-in Capital	\$0	\$0	\$0
Common Stock	\$0	\$0	\$0
Preferred Stock	\$0	\$0	\$0
Owner's Contribution	\$150,000	\$150,000	\$150,000
Retained Earnings	(\$278,302.84)	\$155,370.74	\$1,811,261.84
Check	\$0	\$0	\$0

Business Ratios

	Year 1	Year 2	Year 3	Industry Profile
Sales Growth	4,35%	30,82%	63,29%	4,00%
Percent of Total Assets				
Accounts Receivable	5,61%	4,71%	3,81%	9,70%
Inventory	1,85%	1,82%	1,79%	9,80%
Other Current Assets	1,75%	2,02%	2,29%	27,40%
Total Current Assets	138,53%	150,99%	163,45%	54,60%
Long-term Assets	-9,47%	-21,01%	-32,55%	58,40%
TOTAL ASSETS	100,00%	100,00%	100,00%	100,00%
Current Liabilities	4,68%	3,04%	2,76%	27,30%
Long-term Liabilities	0,00%	0,00%	0,00%	25,80%
Total Liabilities	4,68%	3,04%	2,76%	54,10%
NET WORTH	99,32%	101,04%	102,76%	44,90%
Percent of Sales				
Sales	100,00%	100,00%	100,00%	100,00%

	Year 1	Year 2	Year 3	Industry Profile
Gross Margin	94,18%	93,85%	93,52%	0,00%
Selling, General & Administrative Expenses	74,29%	71,83%	69,37%	65,20%
Advertising Expenses	2,06%	1,11%	0,28%	1,40%
Profit Before Interest and Taxes	26,47%	29,30%	32,13%	2,86%
Main Ratios				
Current	25,86	29,39	32,92	1,63
Quick	25,4	28,88	32,36	0,84
Total Debt to Total Assets	2,68%	1,04%	0,76%	67,10%
Pre-tax Return on Net Worth	66,83%	71,26%	75,69%	4,40%
Pre-tax Return on Assets	64,88%	69,75%	74,62%	9,00%
Additional Ratios				
Net Profit Margin	19,20%	21,16%	23,12%	N.A.
Return on Equity	47,79%	50,53%	53,27%	N.A.
Activity Ratios				
Accounts Receivable Turnover	4,56	4,56	4,56	N.A.
Collection Days	92	99	106	N.A.
Inventory Turnover	19,7	22,55	25,4	N.A.
Accounts Payable Turnover	14,17	14,67	15,17	N.A.
Payment Days	27	27	27	N.A.
Total Asset Turnover	1,84	1,55	1,26	N.A.
Debt Ratios				
Debt to Net Worth	0	-0,02	-0,04	N.A.
Current Liab. to Liab.	1	1	1	N.A.
Liquidity Ratios				
Net Working Capital	\$120 943	\$140 664	\$160 385	N.A.
Interest Coverage	0	0	0	N.A.
Additional Ratios				
Assets to Sales	0,45	0,48	0,51	N.A.

	Year 1	Year 2	Year 3	Industry Profile
Current Debt/Total Assets	4%	3%	2%	N.A.
Acid Test	23,66	27,01	30,36	N.A.
Sales/Net Worth	1,68	1,29	0,9	N.A.
Dividend Payout	0	0	0	N.A.

Upmetrics vs Financial Spreadsheets

Spreadsheets can be a powerful tool for preparing complex financial reports and forecasts. However, using them can be quite time-consuming, intimidating, and frustrating.

The image shows two side-by-side screenshots. On the left is the Upmetrics interface, which is clean and user-friendly. It features a sidebar with icons for 'Profit & Loss', 'Balance Sheet', and 'Cash Flow'. The main area displays a 'Financial Plan' with a 'Profit & Loss' report for the year 2023-24. The report shows Revenue of \$248,391, Cost of Sales of \$18,608, and a Gross Margin of \$198,786. Below the report is a form titled 'What price will you charge for each unit?' with a 'Constant Amount' button and a 'Varying amounts over time' button. On the right is a traditional spreadsheet interface, which is cluttered with many empty cells and a complex formula in cell C4: '=PER(C2:B2)'. The spreadsheet has a menu bar with options like 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Extensions', and 'Help'.

Upmetrics could be your way out of boring & clumsy spreadsheets. Simply enter the numbers, and get accurate and easy-to-understand financial reports made in minutes - no more remembering complex formulas or fussing in the spreadsheet.

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Mariia Yevlash



Student, Sumy State University – Ukraine

The most helpful feature was to make a business plan out of a simple idea. Thankful for all the tools provided, **especially AI which did a great impact on my work.**

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