

Instructions for use of FinAssistant

How to start using the program ?

- If you use FinAssistant for the first time and would like to try it out, first you have to [register](#) in order to get your account on FinAssistant.
- If you have already registered then you need to [sign in](#) to access your data.
- As a registered user you will be able to save all data you enter and to return back to change-delete-supplement, but a business plan cannot be printed and there is no access to financial projections. The right to print is gained by [paying the membership fee](#).

Registration

- By clicking on [Registration](#) link the text will appear containing all details on terms and conditions of use of FinAssistant.
- After accepting the Terms and Conditions, the registration form will appear. Required data are marked with an asterisk (*). However, if an item is not entered or not entered correctly program will warn you.
- After successful registration, you will receive an e-mail with activation link.
- By clicking on the link in the email, the user activates their account. You can then [log in](#) the application by clicking the link [Sign in](#).

Login

- The application form is on the bottom-right corner. If you don't see it (your web browser has remembered something else from the previous visit), click on [Login](#). You need to enter your user name and password you have entered when registering and click Login.
- After successful login you will have access to your data. On the right are [Quick Launch](#) which store up to 5 links to business plans where you last made some changes
- If you are signed in for the first time, we recommend you first read [Your first business plan](#) section
- If you have forgotten your password or user name, click on [I forgot my password](#) and we'll send an e-mail to the address you specified with detailed instruction on how to reset your password.


Your first business plan

- If you are just starting your business you need Business plan for a Startup - click on [Business plan startup](#).
- If you wish to expand an existing business or start a new activity then you need to [enter basic information about Your company](#) . After entering the company, click on [Business Plan](#), and then on [New business plan](#)


You will get the questionnaire (form) and you can start [entering](#) Your first business plan

- There are some simple business plans that can be used to as a guideline for writing your own. Just go to [\(Startup\) Business plan](#) and click on the button „Use Sample“ to copy one of them.


Entering a start up business plan

- Business plan data are grouped by logical units, you can navigate between these units using the navigation on the right (menu) or by using arrows (Previous or Next Page) . When you enter a new business plan it is best to follow these units as defined.
- Pay attention - the top row is a help in which, as you move through the form, useful text, messages and explanations will appear. If there is more text than can fit in 2 lines, the arrow  will show up and by clicking on that arrow the full text will appear .
- Data on firms are not mandatory, enter data you already know. Indicate data about your previous experience and personal financial statement. If there are more owners you need enter data on each of them (use [New Owner](#) link to add new).
- Entered data can be printed in the form of financial projection or a complete business plan upon payment of the fee.
- If you want to [pay a fee](#) click on the Subscription fee.


Data entry of the company-investor

- Click on the link [Company](#) (top menu), then [New company](#) – you'll get the forms for data entry about the firm. You don't have to enter all your data at the beginning, you can complete them at any time. However, data marked with asterisk are obligatory. Pay attention to HELPS in the top row, they may be of great help especially when you enter data the first time.
- After you have completed the form, click the Save icon to save your data 


Entering a business plan

- Business plan data are grouped by logical units, you can navigate between these units using the navigation on the right (menu) or by using arrows (Previous or Next Page). When you enter a new business plan it is best to follow these units as defined.
- Pay attention - the top row is a help in which, as you move through the form, useful text, messages and explanations will appear. If there is more text than can fit in 2 lines, the arrow  will show up and by clicking on that arrow the full text will appear .
- Data on firms that you have previously entered are automatically transferred. Diagrams are drawn based on the data you entered in the balance.
- Special attention should be paid to Sources of funding, and recommendations in the top Help. This will help you evaluate your free available resources, credit standing, etc.
- Entered data can be printed in the form of financial projection or a complete business plan upon payment of the fee.
- If you want to [pay a fee](#) click on the [Subscription fee](#).

Do not know to answer some of the items of the questionnaire?

- Save what you have entered until now and exit the program. Then, collect data, return to FinAssistant and enter those data. FinAssistant remembers how far you came (on the right side of [Quick Launch](#)).
- By clicking on [Business plan](#) a list of Business Plans will open. Find the business plan and click on the icon  to open it and continue with your work.

Want to change some items of finished business plan?

- A click on the link [Business plan](#) will open a List of Business plans. Select your preferred business plan and click on the icon  . The questionnaire (form) will appear, so you can make the desired changes. Don't forget to save the changes.
- If you changed the amount of investment, you must return to the sources of funding and re-close the financial construction funding sources.
- If you changed the amount of planned income, you must also return to the sources of funding,

because changes in income cause changes in the value of investments, as income affects the amount of the required working assets.

Want to do a new business plan for an existing business?

- Click on a [business plan](#) and a list of business plans will open, then click on the link to a [New business plan](#) for creating a new business plan.
- If you entered more than one company, you can choose for which company you want to create a new business plan. Data on selected company will be transferred and if necessary you can update and refresh them.
- A new questionnaire (form) will open and you can start [entering a business plan](#)

Want to do a business plan for a new business?

- Enter [a new company](#)
- Enter [a new business plan](#) for the company that you entered.

Fees payments

- By clicking on the link [Subscription fees](#) the form will appear to choose whether to pay the fee using personal account (personal) or company account.
- If you haven't completed all the necessary information (personal or company), it's time to do so.
- Select the desired type of a membership fee.
- An invoice will be designed, which you can see by clicking on the link [Show invoice](#).
- Your membership will be activated upon payment, after which you will be able to print a business plan and all financial projections without any restrictions.