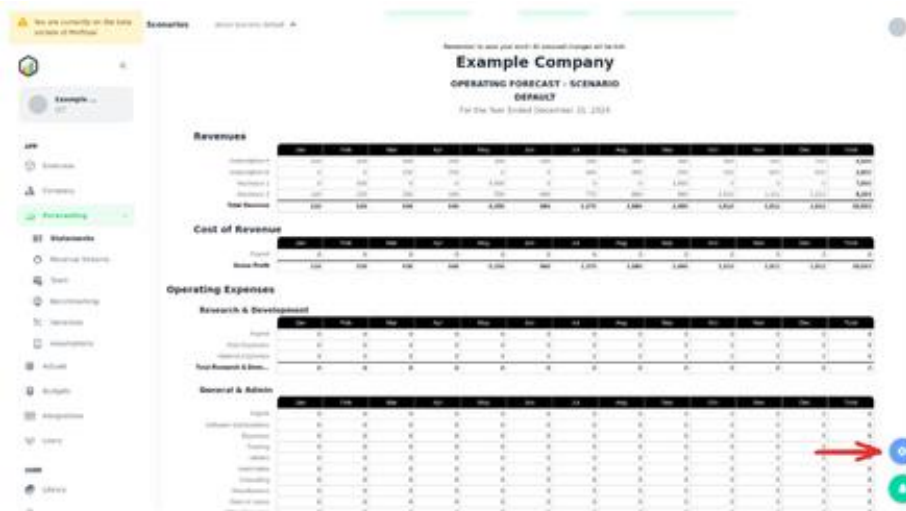


How-To Guide: Edit the Structure of Your Income Statements in Profitual

Welcome to your step-by-step guide on how to customize the structure of your Income Statements using Profitual's Edit Statement Structure form. This guide will help you add, delete, rename, and reorganize rows in your Income Statements with ease. Let's get started!

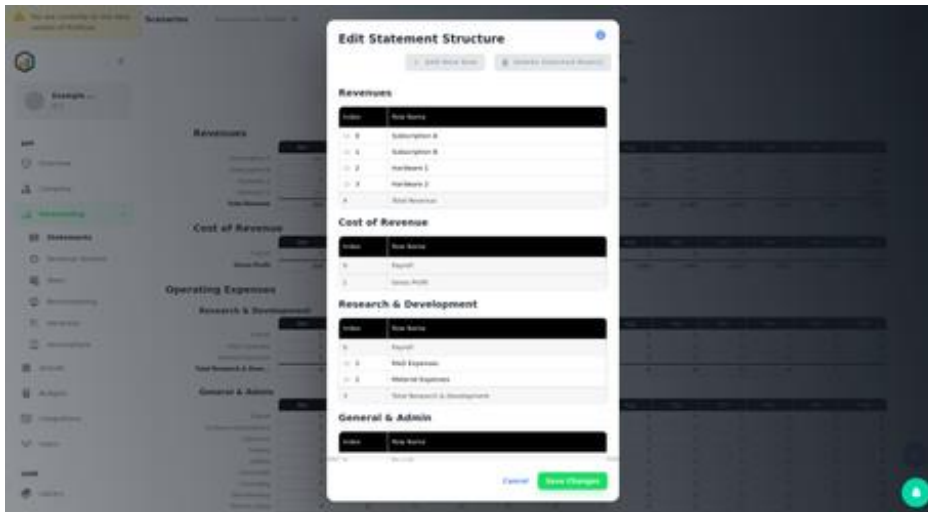
Instructions

1. You can access the Edit Statement Structure form by clicking on the gear icon that appears in the bottom right of your screen when viewing one of your Income Statements.

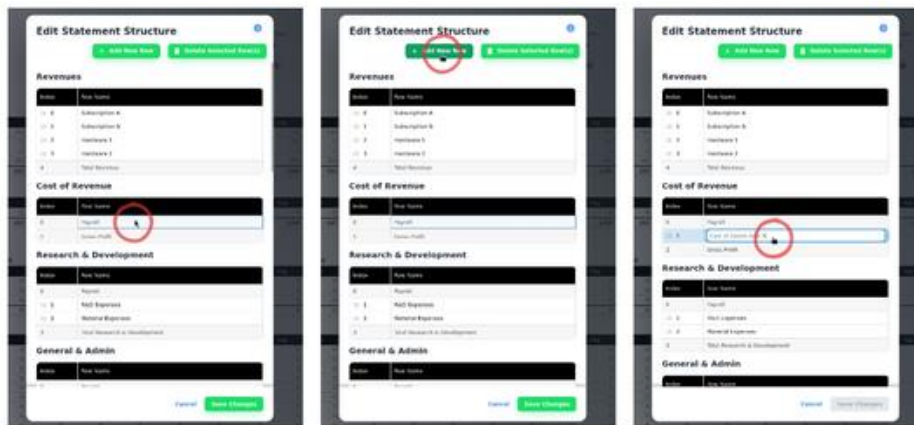


The screenshot shows the Profitual interface for 'Example Company'. The main area displays the 'Example Company' income statement for the year ended December 31, 2024. The statement is divided into sections: Revenues, Cost of Revenue, Operating Expenses, Research & Development, and General & Admin. Each section contains a table with columns for various financial metrics. A red arrow points to a gear icon in the bottom right corner of the table, indicating the 'Edit Statement Structure' form.

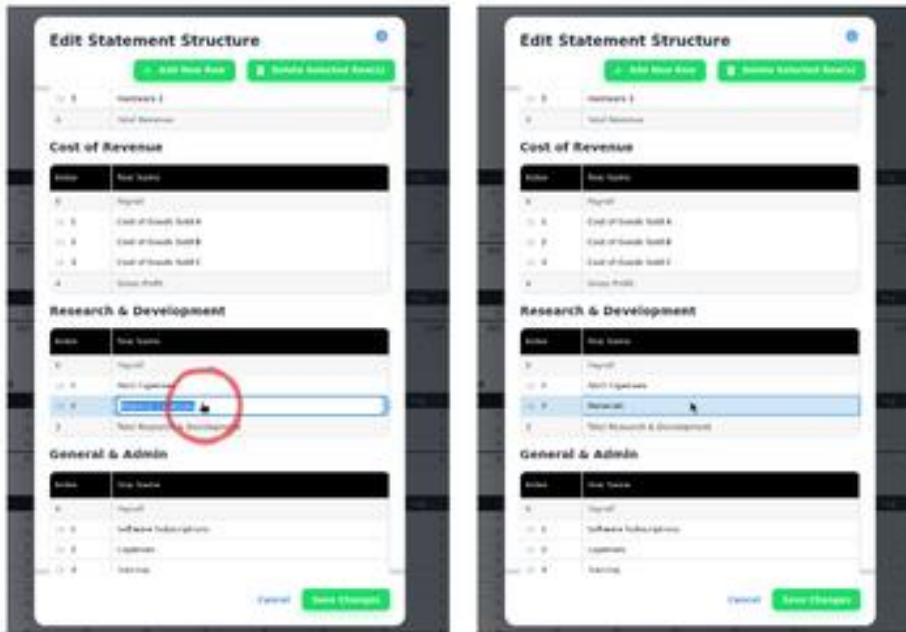
This will open the form which will display all the tables and lines from the Income Statement you are currently viewing:



- To add a new row to a table, first click on the table you want to add to, then click on the “Add New Row” at the top. This will add a new row to your selected table, and you can name it whatever you like!

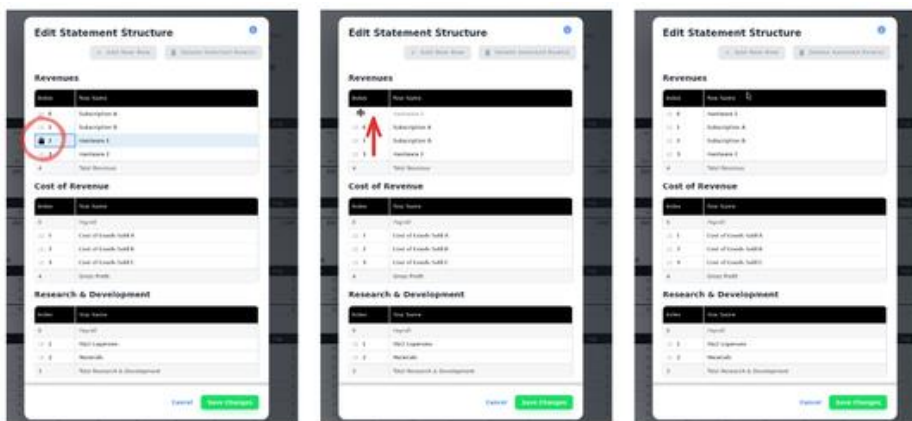


- Some things to note:**
 - You cannot add new rows to the Revenues table from this form. That must be done from the Revenue Streams page.
 - All new rows are required to have a unique name, and the name can’t be left blank! As such we only allow you to add one new row to a table at a time, and all rows must be named before you can save your changes.
- To rename a row you can simply double click on the row you want to rename, give it a new name, and hit enter.

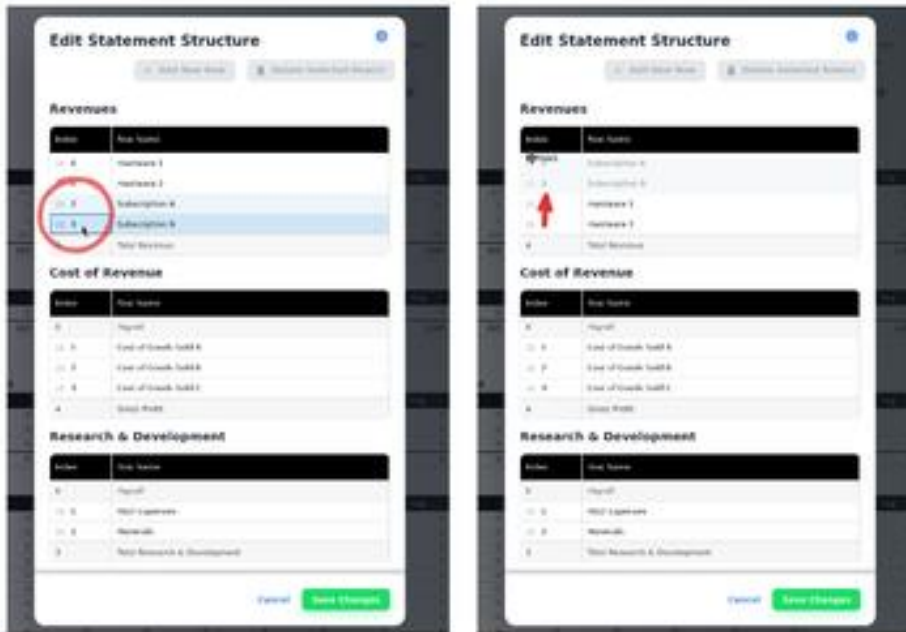


Note that there are certain rows that can not be renamed, such as Revenue Streams, Total rows, Payroll rows, and the Earnings row in the EBITDA tables.

- To change the order that rows appear in a table you can use the drag handles located on the left side of each row. Simply click and drag the row to the desired spot in the table.

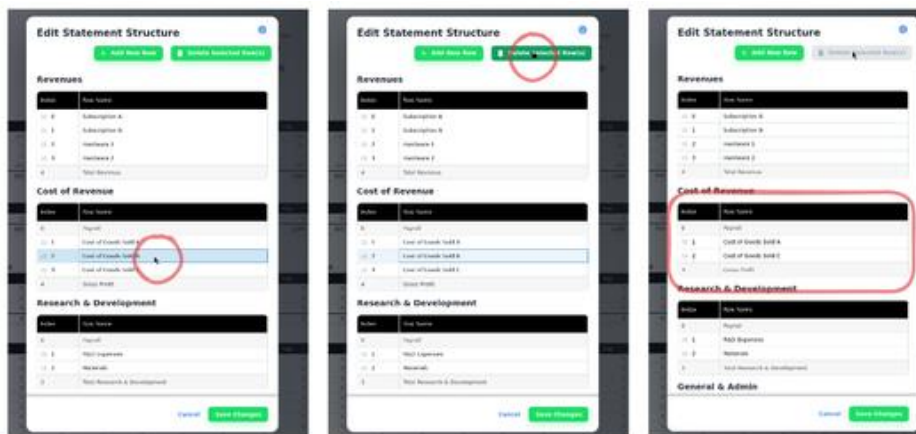


You can even reorder multiple rows at a time! Do this by selecting multiple rows using ctrl+click, then using the drag handles to move multiple rows at once.



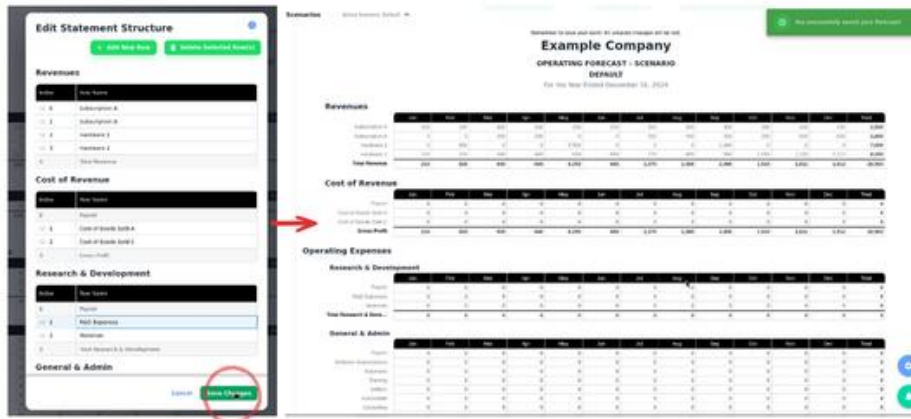
Note that certain rows need to always appear at the top or bottom of certain tables. These tables don't have drag handles and so they can't be reordered.

- To delete a row, first select the desired rows then click the “Delete Selected Row(s)” button.



Again, note that some rows can not be deleted. You can also only delete rows from one table at a time, so if you try and select multiple rows from two tables at once, the rows from the prior table will be deselected.

- Once you've finished reorganizing your Tables, click on the “Save Changes” button in the bottom right. You will be returned to your Income Statement which has been updated to reflect the changes you've made.



General Notes:

- When you add a new row to a table, **that row will also be added to that table for every future year's Income Statement.** New rows will not be added to previous years. If you only want a line to appear in a few specific years you can also delete it from any future years where you don't want it to appear.
- When you delete a row from a table, **that row will only be deleted for the year that you deleted it from.** This way you can't accidentally lose data in future years by deleting rows in prior years. If you want to completely delete a row from your entire financial model, then ensure you delete the row from every year's statement. Otherwise, these rows may still appear in other pages, like Integrations, Variance, or even exported Excel spreadsheets.