

Business Performance Report EAP

Quick Start Guide

What is the Business Performance Report?

BrightAccountProduction's Business Performance Report (BPR) is an AI-powered feature that analyses up to six years of your historical nominal ledger data and generates a professional financial performance report with charts, tables and AI-generated commentary. This helps you move from compliance to advisory conversations with your clients.

Getting started

1 Enable Permissions Your practice administrator must enable the BPR permission for each user who needs access.	2 Open a Business Navigate to any business within BrightAccountsProduction as you normally would.	3 Click Trends Click the Trends button in the sidebar menu. The report generates automatically in 20-30 seconds.
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What you'll see

6 Core Metrics (pre-populated)	6 Additional Metrics (sidebar)
Revenue Trend, Gross Profit Margin, Operating Overheads, Operating Profit Margin, Revenue vs COGS, Revenue vs Overheads	Cash & Bank Balances, Debtor & Creditor Balances, Debtor & Creditor Days, Working Capital, Break-Even Point, Revenue vs COGS vs Overheads

Each metric includes a chart, a table and AI-generated commentary. Add, remove, and reorder metrics to suit each client.

💬 Don't see a metric you need? Let us know — your suggestions directly influence what we build next.

What you can do now vs what's coming

Available Now	Planned for Future Releases
✓ Generate reports for any business ✓ View charts, tables and AI commentary ✓ Add/remove/reorder metrics ✓ Edit commentary (not saved) ✓ Provide feedback on each section	○ Save edits and report history ○ Copy to clipboard / export to Word ○ Benchmarking ○ Forecasting and projections ○ Conversational AI queries

Important to know:**This is an early release.**

AI-generated commentary should be reviewed before use in any client-facing context. Please apply your own professional judgement.

Your feedback shapes this product

Use the feedback buttons on each section or contact us directly. Don't see a metric that you'd like to include? Let us know your suggestion.

Questions or feedback? brightap.eap@brightsg.com