

Business Performance Report EAP

Frequently Asked Questions

Answers to common questions from EAP participants. This document will be updated regularly during the programme.

About the Business Performance Report

Q What is the Business Performance Report?

The Business Performance Report (BPR) is a new AI-powered feature within BrightAP that analyses up to six years of your historical nominal ledger data and generates a professional financial performance report. It includes charts, tables and AI-generated commentary, all designed to help you move from compliance to advisory conversations with your clients.

Q What data does the report use?

The report uses up to six years of historical nominal ledger data already held within BrightAP. No external data sources are used. This means the analysis is based entirely on your own client data, giving you insights that no publicly available source can provide.

Q What metrics does the report cover?

The report includes 12 predefined financial metrics. Six core metrics are pre-populated by default: Revenue Trend, Gross Profit Margin, Operating Overheads, Operating Profit Margin, Revenue vs Cost of Goods Sold, and Revenue vs Overheads. A further six metrics are available from the sidebar, including Cash and Bank Balances, Debtor and Creditor analysis, Working Capital, and Break-Even Point.

Q How accurate is the AI-generated commentary?

The AI commentary is generated based on the financial data available and has been reviewed by accountancy professionals. However, as with any AI-generated content, it should be treated as a starting point rather than a definitive analysis. We strongly recommend reviewing all commentary before using it in any client-facing context and applying your own professional judgement.

Q Is the Business Performance Report available for all businesses in my practice?

Yes. Once the feature is enabled for your practice, you can generate a Business Performance Report for any business within your BrightAP account, provided there's sufficient historical data available.

Q Can the report do forecasting or projections?

Not in this version. The report is currently historical and rear-looking, analysing data from previous financial periods. Forecasting and projections are on the product roadmap for a future phase.

Setting Up and Using the Report

Q How do I access the Business Performance Report?

You can access the BPR from within any business in BrightAP. Simply open the business and click the Trends button in the sidebar menu. The report is generated automatically using the financial data already held in the system. There's nothing additional to set up.

Q Do my staff need any special permissions to access the report?

Yes. Access to the BPR is controlled by a user-level permission. Your practice administrator will need to enable this permission for each user who should have access. Without it, the Trends button won't appear in the sidebar menu. If you or a member of your team can't see the Trends button, please check that the permission has been enabled in your practice administration settings.

Q Can I customise which metrics appear in the report?

Yes. The report is pre-populated with six core metrics by default, but you can add or remove metrics and reorder sections to suit the needs of each individual client.

Q Can I edit the AI-generated commentary?

Yes, you can edit the AI-generated commentary directly within the report. However, the ability to save your edit is not available in this initial release. If you navigate away from the report, any changes you've made will be lost. The ability to save edits is planned for an upcoming release.

Q Can I export the report to Word or PDF?

Export functionality is not available in this initial release. We're working on a copy-to-clipboard feature that will allow you to paste report content directly into Word for further editing. This is planned for an upcoming release. PDF export is also being considered for a future phase.

Q Can I save a report and come back to it later?

Saved report history is not available in this version. Each time you access the report, it's generated fresh from the current data. The ability to save reports is planned for a future release. In the meantime, once export functionality becomes available, we recommend saving any report you wish to keep externally.

Q Why does the report take some time to generate?

The report analyses up to six years of nominal ledger data across multiple metrics, with each metric processed through an individual AI workflow. This means generation can take 20 to 30 seconds. We're aware of this and are actively working on performance improvements. Thank you for your patience as we optimise this.

Data, Security & Compliance**Q Is the Business Performance Report GDPR compliant?**

Yes. The Business Performance Report processes data in accordance with GDPR and Bright's existing data protection policies. The data used is the same nominal ledger data already held within BrightAP.

Q Where is the data stored?

The financial data is sent securely to Bright's AI platform for analysis. The data used is the same nominal ledger data already held within BrightAP. Trace data is stored within Bright's AI platform infrastructure for audit purposes, in accordance with Bright's existing data protection policies.

Bright SG Ltd, 3 Shortlands, Hammersmith, London, W6 8DA is the registered data controller.

Q Who can see the report within my practice?

The report is accessed from within a business in BrightAP and inherits the existing permissions model. In addition, access to the Business Performance Report is controlled by a user-level permission, meaning your practice administrator can choose to limit which users within the practice can generate and view reports. If you're unable to see the report, please check with your practice administrator.

Q What happens to my data if I stop using the feature?

If you stop using the BPR, no further data will be sent to the AI platform for analysis. Your historical nominal ledger data remains within BrightAP as it always has. No data is retained by the AI platform beyond the generation of each individual report.

The EAP Programme

Q What is the purpose of the Early Adopter Programme?

The EAP gives a select group of practices early access to the BPR before general release. In return, we ask for active use and honest feedback. Your experience during this phase will directly inform the development and refinement of the report before it launches more widely.

Q How long does the EAP run?

The EAP duration will be confirmed by your contact. We'll give you advance notice before any transition to general availability.

Q How do I submit feedback?

There are feedback buttons on every AI-generated output within the report. Please use these to flag anything that's helpful, unhelpful, inaccurate, or could be improved. You can also reach out to us directly with any broader feedback or suggestions. Structured feedback is most useful, but we're equally interested in informal observations, questions that come up with staff, and anything that surprises you about how the report works.

Q What happens at the end of the EAP?

At the end of the EAP, the BPR will move to general availability for BrightAP customers. EAP participants will be given advance notice and details will be communicated by your EAP contact.

Q Who do I contact if I have a problem?

Please contact Jonathan Kiernan at brightap.eap@brightsg.com.

Q How much does the Business Performance Report cost?

Nothing, for now — and that's deliberate. Your use of the BPR throughout the early adopter programme is completely free of charge.

We haven't set a pricing model yet because we want to understand the real value it delivers to your practice before we do. Your feedback during this programme will directly shape how we price it. We'll be transparent with you before anything changes.

Still have a question?

This FAQ will be updated throughout the EAP as new questions arise. If your question isn't answered here, please reach out to your EAP contact directly.

EAP Contact: Contact Jonathan at brightap.eap@brightsg.com