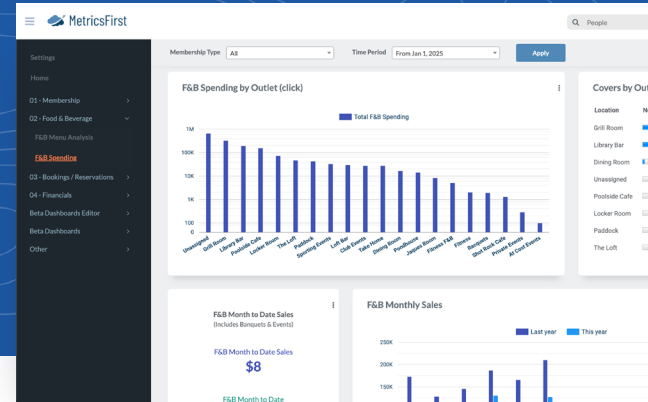


# See More. Know More. Do More.

An upgraded reporting experience,  
built on Jonas Club Software.

We've rebuilt your reporting experience. Whether you want ready-to-use insights or the freedom to explore data your way, everything financial is now at your fingertips, updated daily and built around how club leaders actually work.



## The Enhanced Reporting Experience

### New Controller Report

Financial insight, ready to go.

- Income Statement, Balance Sheet & Cash Flow
- Trial balance summary
- Key financial performance indicators
- Easy to navigate — and updated daily

### Custom Reports

Your data, your way.

- Build your own charts and visuals on the dashboard
- Choose metrics, timeframes, and filters
- Drag-and-drop dashboard editing
- Tailored views that fit your workflow

### AI-Powered Insights BETA

Just ask, get answers instantly.

- Ask questions in plain language
- Get insights and charts in seconds
- Explore trends without building reports
- Designed to be intuitive and fast

### Built for Decisions

Everything, now in one place.

- Track trends across periods at a glance
- Review performance with budget variance
- Inform stakeholders with clear visuals
- Each section easy to navigate, updated daily

## Everything Club Leaders Need. One Connected View.

Income Statement

Balance Sheet

Cash Flow

Trial Balance

Financial KPIs

Custom Charts

AI Assistant

Budget Variance

Filters & Timeframes

Daily Updates

# Reporting that works the way clubs do.

Clubs run on dues cycles, house accounts, and financial reviews that generic dashboards don't understand. Enhanced Reporting is the financial expression of Jonas, ready-to-use insight for leaders, and an open canvas for the people who live in the numbers.



## For Club Leaders

Open the Controller Report for income, balance and cash flow

Review trial balance and key financial KPIs at a glance

Compare actuals to budget with built-in variance

Trust figures that refresh daily, automatically

Share clear, consistent insight with your board

The screenshot shows a detailed income statement summary for March 2025. The table is organized by department and includes columns for Budget, Actual, Variance, and Budget Variance. Key departments listed include Administration, Billing, and House Department. The total revenue is \$1,125,000, and the total expenses are \$1,000,000, resulting in a net income of \$125,000.

Department	Category	Budget	Actual	Variance	Budget Variance %	Actual P/E	Budget P/E	Actual P/E Variance %	Actual YTD	Budget YTD	Budget Variance YTD	Budget Variance YTD %
Administration	Revenue	\$22,254	\$22,254	\$0	0%	\$22,254	\$22,254	0%	\$22,254	\$22,254	\$0	0%
Administration	Expense	\$85,000	\$85,000	\$0	0%	\$85,000	\$85,000	0%	\$85,000	\$85,000	\$0	0%
Billing	Revenue	\$1,100,000	\$1,100,000	\$0	0%	\$1,100,000	\$1,100,000	0%	\$1,100,000	\$1,100,000	\$0	0%
Billing	Expense	\$100,000	\$100,000	\$0	0%	\$100,000	\$100,000	0%	\$100,000	\$100,000	\$0	0%
House Department	Revenue	\$1,000,000	\$1,000,000	\$0	0%	\$1,000,000	\$1,000,000	0%	\$1,000,000	\$1,000,000	\$0	0%
House Department	Expense	\$900,000	\$875,000	\$25,000	2.78%	\$875,000	\$900,000	-3.06%	\$875,000	\$900,000	\$25,000	2.78%
<b>Total</b>	<b>Revenue</b>	<b>\$1,125,000</b>	<b>\$1,125,000</b>	<b>\$0</b>	<b>0%</b>	<b>\$1,125,000</b>	<b>\$1,125,000</b>	<b>0%</b>	<b>\$1,125,000</b>	<b>\$1,125,000</b>	<b>\$0</b>	<b>0%</b>
<b>Total</b>	<b>Expense</b>	<b>\$1,000,000</b>	<b>\$875,000</b>	<b>\$125,000</b>	<b>12.5%</b>	<b>\$875,000</b>	<b>\$1,000,000</b>	<b>-12.5%</b>	<b>\$875,000</b>	<b>\$1,000,000</b>	<b>\$125,000</b>	<b>12.5%</b>
<b>Total</b>	<b>Net Income</b>	<b>\$125,000</b>	<b>\$250,000</b>	<b>\$125,000</b>	<b>100%</b>	<b>\$250,000</b>	<b>\$125,000</b>	<b>100%</b>	<b>\$250,000</b>	<b>\$125,000</b>	<b>\$125,000</b>	<b>100%</b>

Controller Report - income statement summary



## For Analysts & Controllers

Build your own charts and visuals on the dashboard

Choose the metrics, timeframes and filters that matter

Edit existing dashboards with drag-and-drop ease

Ask the AI assistant a question, get a chart back

Tailor a workspace that fits your exact workflow

The screenshot shows a dashboard interface with a sidebar for navigation, a main area for data visualization, and a table of data. The table displays financial metrics for various departments, including Revenue, Actual, Budget, Variance, and Variance %.

Department	Category	Actual	Budget	Variance	Variance %	YTD Actual	YTD Budget	YTD Variance	YTD Variance %
Administration	Revenue	\$22,254	\$22,254	\$0	0%	\$22,254	\$22,254	\$0	0%
Administration	Expense	\$85,000	\$85,000	\$0	0%	\$85,000	\$85,000	\$0	0%
Billing	Revenue	\$1,100,000	\$1,100,000	\$0	0%	\$1,100,000	\$1,100,000	\$0	0%
Billing	Expense	\$100,000	\$100,000	\$0	0%	\$100,000	\$100,000	\$0	0%
House Department	Revenue	\$1,000,000	\$1,000,000	\$0	0%	\$1,000,000	\$1,000,000	\$0	0%
House Department	Expense	\$875,000	\$900,000	\$25,000	2.78%	\$875,000	\$900,000	\$25,000	2.78%
<b>Total</b>	<b>Revenue</b>	<b>\$1,125,000</b>	<b>\$1,125,000</b>	<b>\$0</b>	<b>0%</b>	<b>\$1,125,000</b>	<b>\$1,125,000</b>	<b>\$0</b>	<b>0%</b>
<b>Total</b>	<b>Expense</b>	<b>\$875,000</b>	<b>\$900,000</b>	<b>\$25,000</b>	<b>2.78%</b>	<b>\$875,000</b>	<b>\$900,000</b>	<b>\$25,000</b>	<b>2.78%</b>
<b>Total</b>	<b>Net Income</b>	<b>\$250,000</b>	<b>\$225,000</b>	<b>\$25,000</b>	<b>11.1%</b>	<b>\$250,000</b>	<b>\$225,000</b>	<b>\$25,000</b>	<b>11.1%</b>

Build custom reports and visuals, your way



## Use AI to Ask, Discover & Build

BETA

Type a question. Get the insight or chart you need.

"What were my total expenses in April 2025?"

"Show me the breakdown of my assets."

"Bar chart of my income distribution in May 2025."

### Tips to get the most out of it

Be specific — include timeframes in your question

Try things like "net PPE ratio in Feb over years"

Don't hesitate to explore — it's designed to be intuitive

Share feedback — we're constantly improving

## Ready to See More?

Everything is live now - explore your reports, build your view, and just ask.

ACCESS YOUR DATA