



Getting Started with WiseFins

A quick-reference training guide covering onboarding, navigation, filters, account settings, and where to go for help.



What's Inside

Twelve short guides covering everything you need for your first weeks in WiseFins.

1 Your WiseFins Onboarding Journey

2 Accessing the Knowledge Center

3 Getting Help from the AI Bot

4 Account Setup & First Login

5 Platform Overview: The 5 Sections

6 Is WiseFins Replacing My Reports?

7 Using the Basic Filters

8 Using the Advanced Filters

9 Resetting Your Password

10 Updating Your Profile & Language

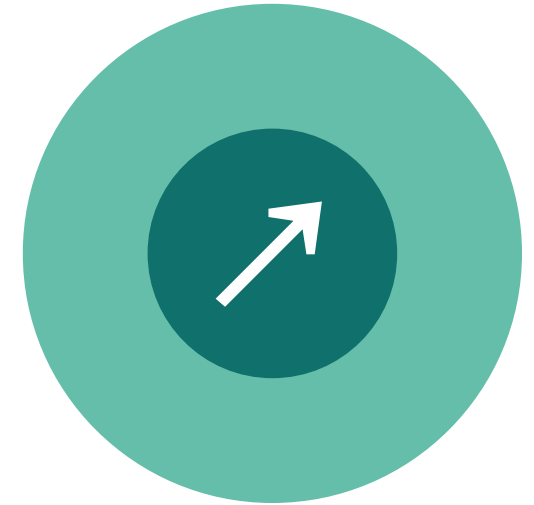
11 Exporting Data

12 Viewing Multiple Properties (HQ Leaderboard)



What Does My Onboarding Journey Look Like?

- Your onboarding runs through 4 phases: Enrollment & Agreement, Technical Integration, Rollout, and ongoing KPI Business Reviews.
- During Technical Integration, our team connects your POS, purchasing, and reservation systems, then monitors data for accuracy before confirming everything is ready.
- We recommend at least 2 months of gathered data before starting structured performance reviews.

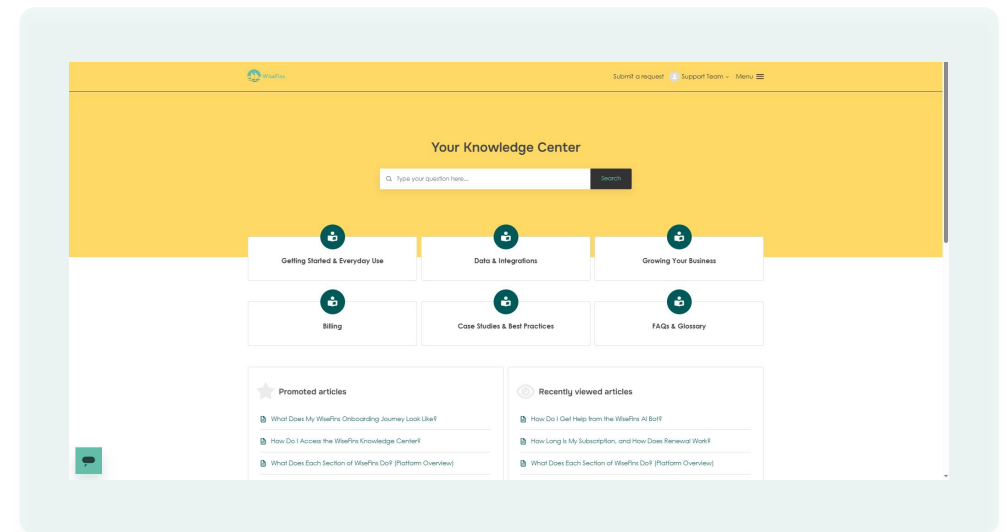




SELF-SERVICE

How Do I Access the Knowledge Center?

- Visit wisefins.zendesk.com/hc anytime.
- Browse by category: Getting Started, Data & Integrations, Billing, and Growing Your Business.
- Use the FAQs & Glossary section for fast answers, or the search bar for anything specific.

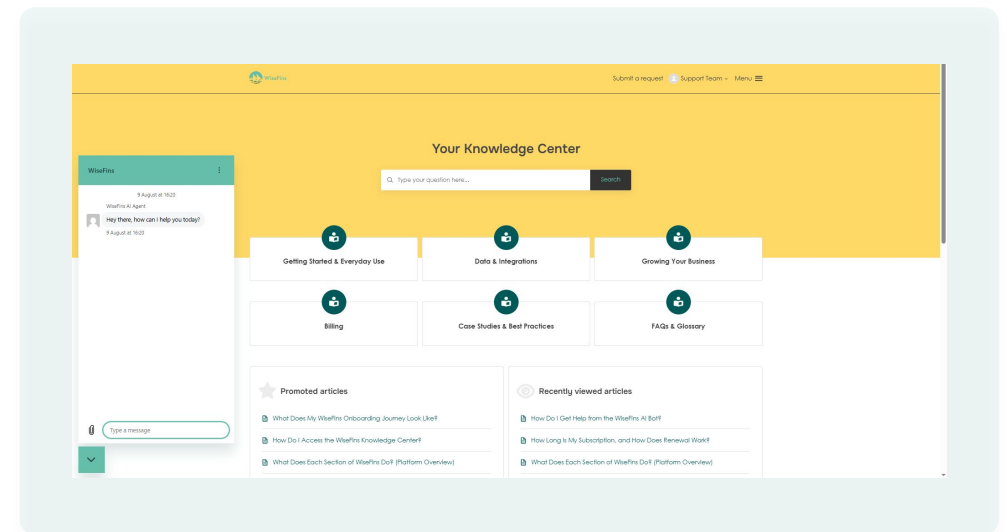




AI SUPPORT

How Do I Get Help from the WiseFins AI Bot?

- Available 24/7 in the chat widget, on the WiseFins platform and on wisefins.com.
- Can answer questions on getting started, dashboards, KPIs, margin strategy, case studies, and billing.
- For account-specific changes (like resetting a user), it will connect you with a human.





How Do I Set Up My Account and Log In?

- You'll receive an Account Activation Email once your account is created.
- Follow the link to create a secure password (12+ characters, meeting our security requirements).
- A confirmation email follows, then you're ready to log in at software.wisefins.com/web.

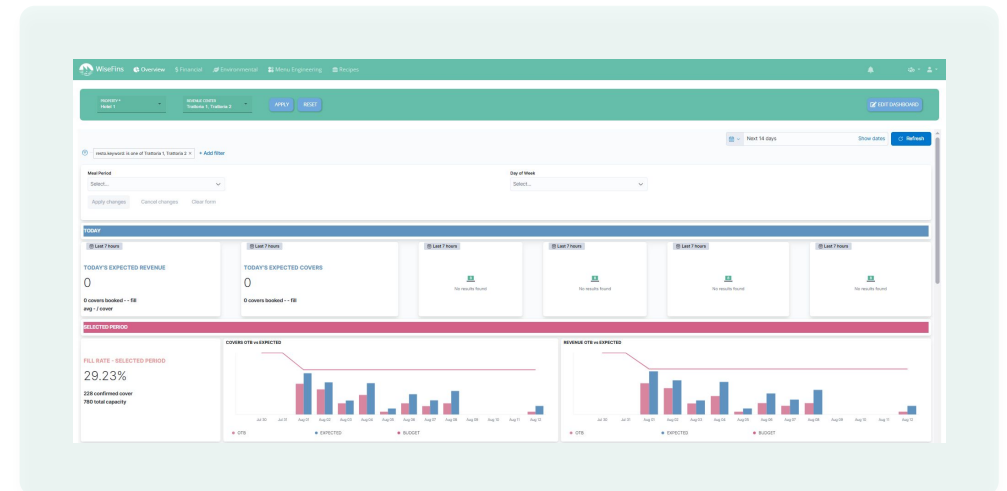




NAVIGATION

What Does Each Section of WiseFins Do?

- Overview: predictive dashboard combining reservation and POS data.
- Financial: your historical analytics, revenue, cost, covers, and more.
- Environmental, Menu Engineering & Recipes round out the platform, from footprint tracking to per-dish detail.





Is WiseFins Replacing My Reporting Tools?

- No. Your PnL and DRR remain your official financial records.
- WiseFins mirrors your POS in real time, showing you why the numbers move, not replacing them.
- Think of it as the analysis layer that sits on top of your existing reports.





NAVIGATION

How Do I Use the Basic Filters?

- Set Property and Revenue Center first, then Timeline last, for the most accurate analysis.
- Timeline supports quick presets, common ranges, or a precise custom date & time window.
- These filters appear across Overview, Financial, and Environmental dashboards.

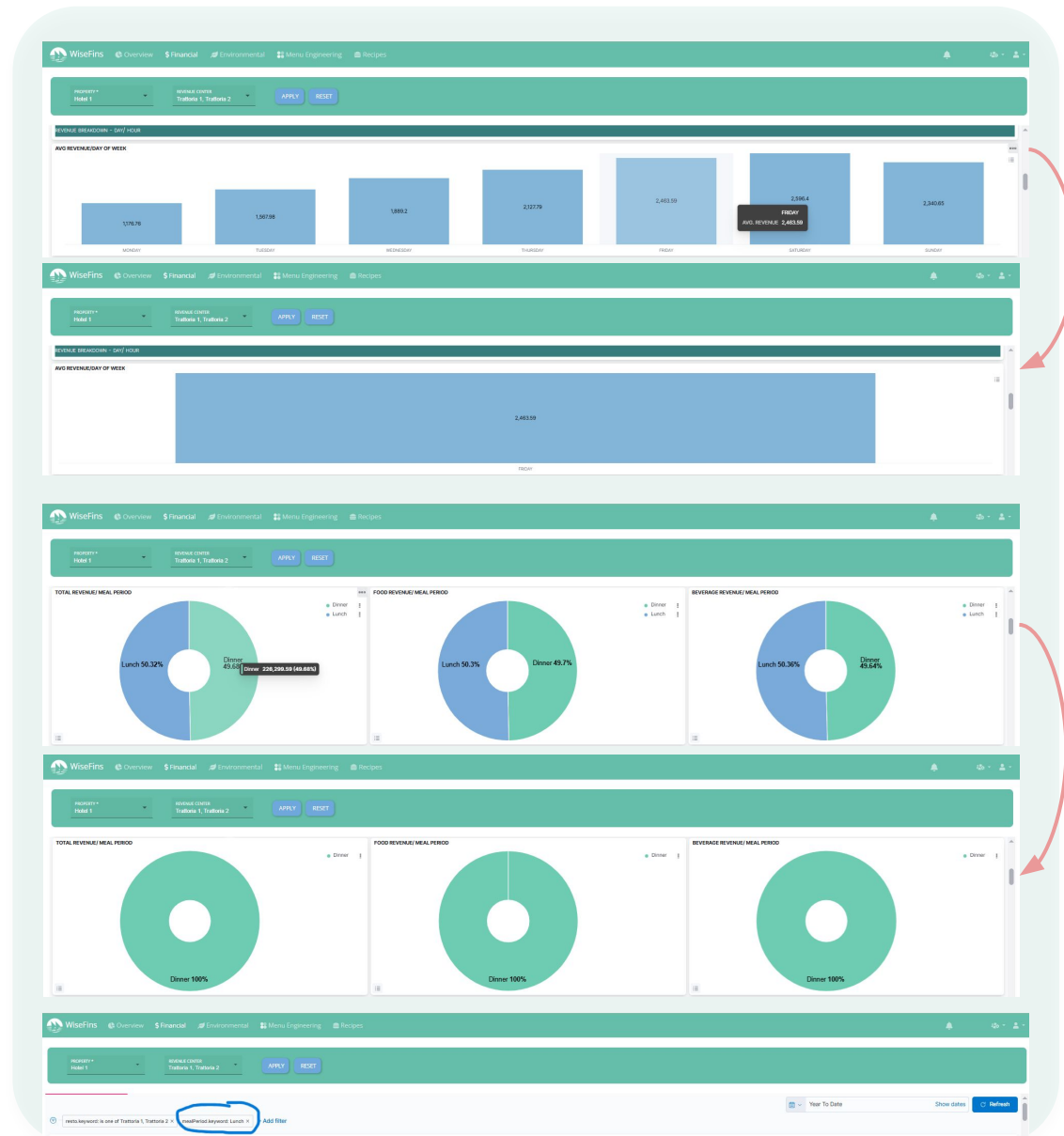
The screenshot displays the WiserFins dashboard interface. At the top, there's a navigation bar with tabs for Overview, Financial, Environmental, Menu Engineering, and Recipes. Below this, a filter bar allows users to select a Property (e.g., Hotel 1) and a Revenue Center (e.g., Restaurant 1, Restaurant 2). A dropdown menu for 'Timeline' is open, showing options like 'Next 14 days', 'Today', 'Yesterday', 'This week', 'Month To Date', and 'Year To Date'. The main dashboard area shows various metrics: 'TODAY'S EXPECTED REVENUE' (2944.50), 'TODAY'S EXPECTED COVERS' (144.5), '7.73% Noshow rate', '14.68% CXL rate', and '35 Same'. A 'Quick select' dropdown is also visible, showing 'Next 14 days' as the selected option. The bottom section of the dashboard shows a calendar view for August 2026, with dates 1 through 31 displayed.



NAVIGATION

How Do I Use the Advanced (Detailed) Filters?

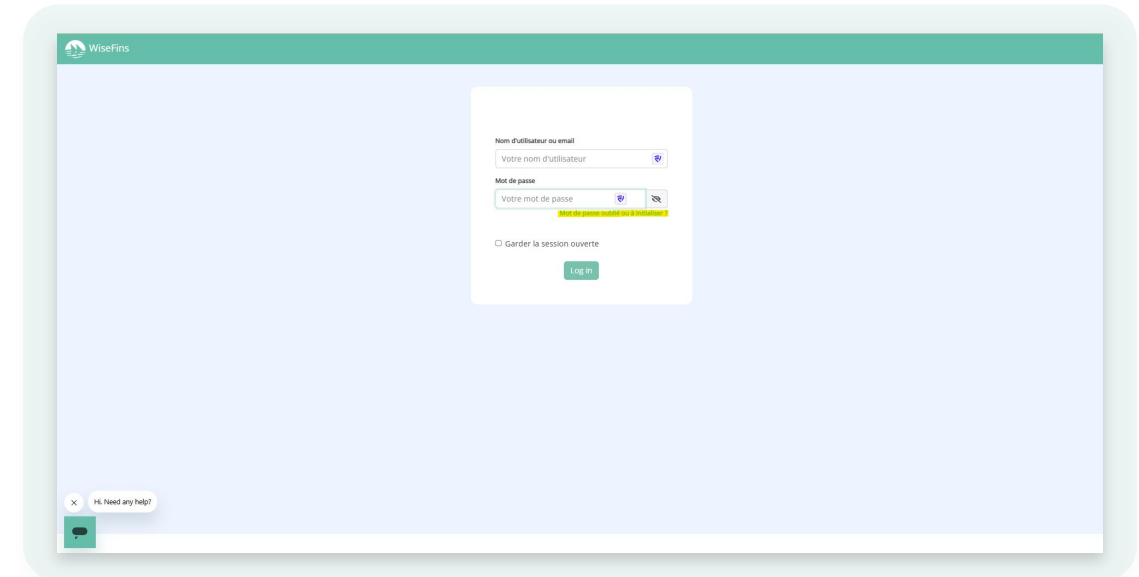
- Most donuts and charts are clickable, click any segment to filter the entire dashboard.
- Stack filters to drill into very specific questions, down to a single hour, day, and item.
- Remove a filter anytime by clicking the X on its tag near the top of the page.



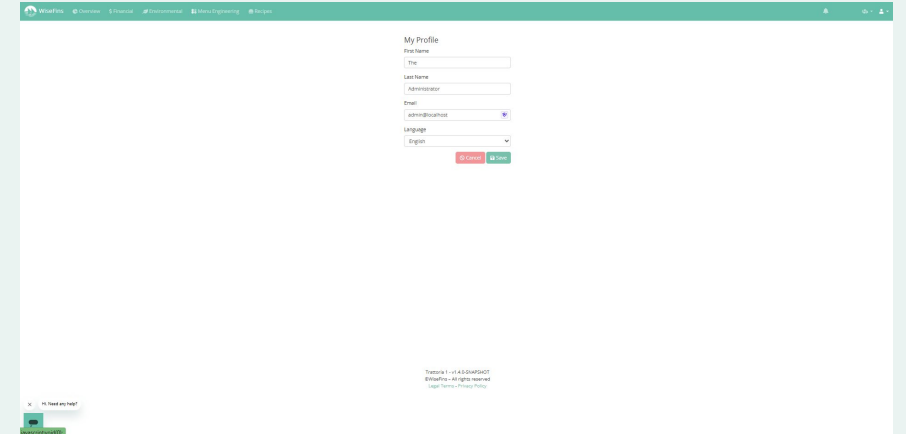


How Do I Reset My Password?

- Click Forgot password on the WiseFins login page.
- Enter your email, follow the link, and set a new password, no need to contact support.
- Didn't get the email? Check spam first, then reach out via chat if it's still missing.



- Click your profile icon (top right) and select Settings.
- Update your First Name, Last Name, Email, or preferred display Language.
- Password changes use a separate Password option in the same menu.





DATA

Can I Export Data from WiseFins?

- Yes, most charts and tables include an Export option.
- Choose Formatted for clean, ready-to-use data, or Raw for unprocessed figures.
- Export is available on most, but not all, charts and tables.

The screenshot displays two data tables from the WiseFins interface. The top table, 'REVENUE DISTRIBUTION/ EVENT SPACE', lists metrics for different event spaces. The bottom table, 'REVPAS PER REVENUE CENTER (tab)', lists metrics for different revenue centers. Both tables include an 'Export' button in the top right corner. A red arrow points from the 'Export' button in the bottom table to a dropdown menu that shows 'Download CSV' and 'Raw CSV' options.

Filters	SURFACE (M²)	REVENUE	COVERS	AVG. CHECK	AVG. FOOD CHECK	AVG. BEV. CHECK	REVENUE / M²
Grand Ballroom	515	469,153	4,981	94.19	68.76	25.43	910.98
Salon	90	75,461	417	180.96	132.1	48.86	838.46
Junior Ballroom	258	159,912	1,301	122.91	89.73	33.19	619.81
Public Space	349	0	0				0
	1,212	704,526	6,699	105.17	76.77	28.4	581.29

REVENUE CENTER	REVENUE	DAYS	SEATING	MEALS PER DAY	SURFACE (M²)	REVPAS	REVPAS	REV / M²
Trafalgar 2	349,335	228	30	2	150	23.91	639	2,812.82
Trafalgar 1	105,006	228	40	2	150	5.81	145	706.65



MULTI-PROPERTY

How Do I View Data Across Multiple Properties?

- On the Financial dashboard, select HQ Leaderboard in the Property filter.
- Benchmarks every property and outlet against a corporate average across Revenue, Volume, and Guest Spend.
- Each metric includes a Scoring column, so top and bottom performers stand out instantly.

The screenshot displays the 'HQ Leaderboard' dashboard. At the top, there are navigation tabs: 'Overview', 'Financial', 'Operational', 'Marketing', and 'Reports'. The 'Financial' tab is active. Below the navigation, there's a filter section with 'Property' set to 'All Properties' and 'Metric' set to 'Revenue'. The main content area shows two tables side-by-side, both titled 'HQ Leaderboard - Revenue'. Each table has columns for 'Property name', 'Revenue Center', 'Revenue', 'Normalized', 'Corp. Average', and 'Scoring'. The tables list various properties and their performance metrics, with scores ranging from 100 to 150.

Property name	Revenue Center	Revenue	Normalized	Corp. Average	Scoring
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100
Loft Hotel Hong Kong	Revenue	\$1,200,000	\$1,200,000	\$1,200,000	100

Still Have Questions?

The WiseFins AI Bot is available 24/7 in the chat widget, on the platform and on wisefins.com, and can answer most questions instantly using this Knowledge Center.

wisefins.zendesk.com/hc

support@wisefins.com