

FP&A Student Test Plan Checklist

Preset & Budgets

- Create a QSR preset (2027:Base) via /preset/qsr (12 months generated).
- Auto-generate budget from actuals with growth; verify uplift applied.

Headcount & Payroll (single-file build)

- Add 2 hires with different start months and raises.
- Bake to budget; confirm Opex:Labor/Taxes/Benefits rows appear correctly.

Goal Seek Solver (single-file build)

- Run solver with target EBITDA; review suggested % changes.
- Apply changes; verify scenario EBITDA moves toward target.

Budget vs Actuals (BvA)

- Run /bva/analyze for 2024 vs 2024 budget.
- Check Favorable/Unfavorable flags and AI narrative.

AI Forecasting

- Forecast Revenue:Food with ARIMA; confirm 12-month predictions returned.
- Compare with ML regression; verify results are plausible.

Reports

- Generate a board pack PPT; open file and confirm KPI slide present.

Excel/Integrations

- Retrieve rows via /excel/retrieve; confirm filters work.
- Submit edited rows via /excel/submit; verify changes saved.

Migrations (full UI build)

- Use Migration UI to dry run DataRails CSV; confirm counts.
- Import to 2027:Imported; verify scenario rows appear.
- Test dept_map/account_map overrides; confirm mapping applied.
- Re-import same CSV; verify no duplicates.

Students: Check off each box after testing. Focus only on implemented features.