

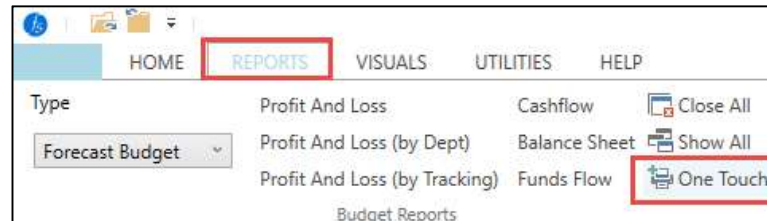
Forecast 5: One Touch Reporting

Overview

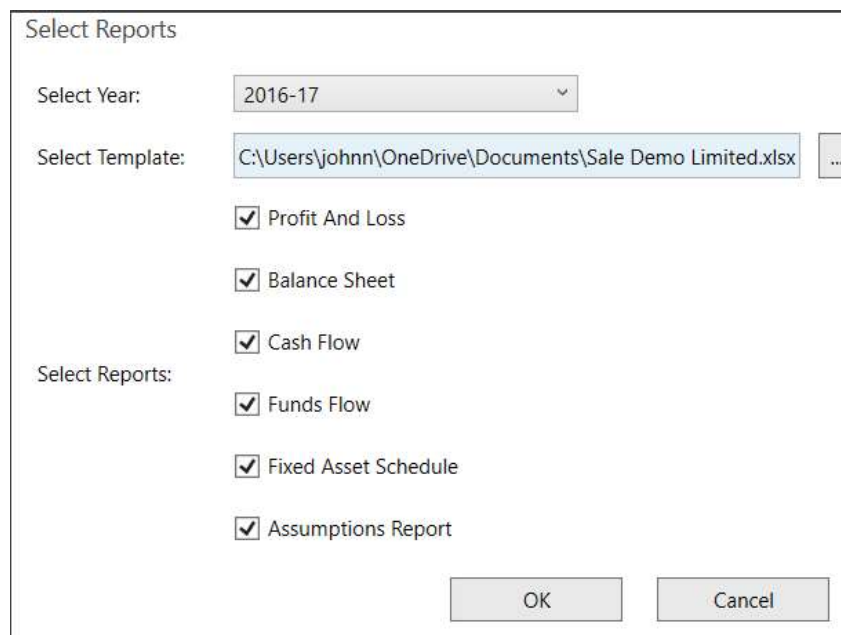
The One Touch Reporting (OTR) feature is designed to reduce the amount of time taken to produce final and quality reporting.

Step by Step Guide

1. Select the one touch icon from the reports menu

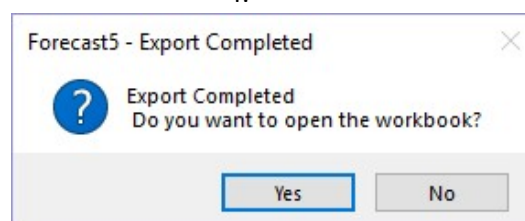


2. Choose the year, select your preformatted excel template and select the reports you want included. This excel template can contain your company logo, disclaimer and any sheets of information you want included in the report – Contact us to assist in with formatting your template.

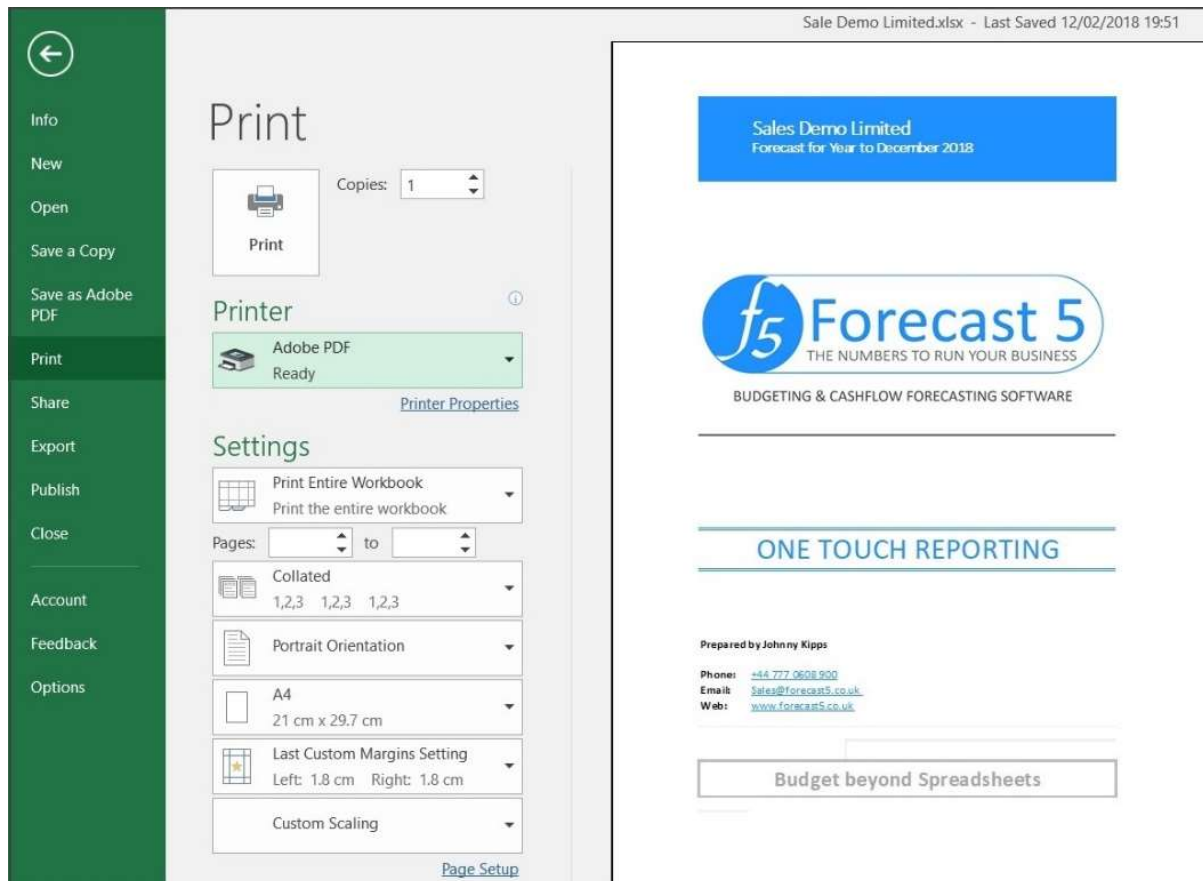


3. Once the report has exports, click Yes to automatically open the report. Once open, you will see each of the selected reports are in their own tab and your predefined pages are included.

4.



5. Save the worksheet (by default, it is renamed with your forecast name) to disk.
6. For a report with multiple years, return to Forecast 5 and rerun OTR, selecting the next year, e.g. 2019, choosing the newly saved template and the reports will be added as new sheets to the work book.
7. Finally, print the entire workbook and you have a professional quality output completed in minutes.



We understand your business and how vital it is for you to produce reliable, accurate, trustworthy forecasts, Cashflows and Budgets for you and your clients.

Forecast 5 is the expert's budget solution.

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