

## Forecast 5: One Touch Reporting

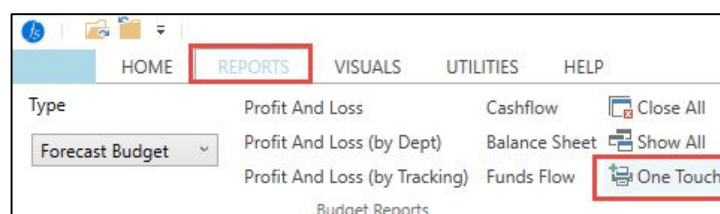
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### Overview

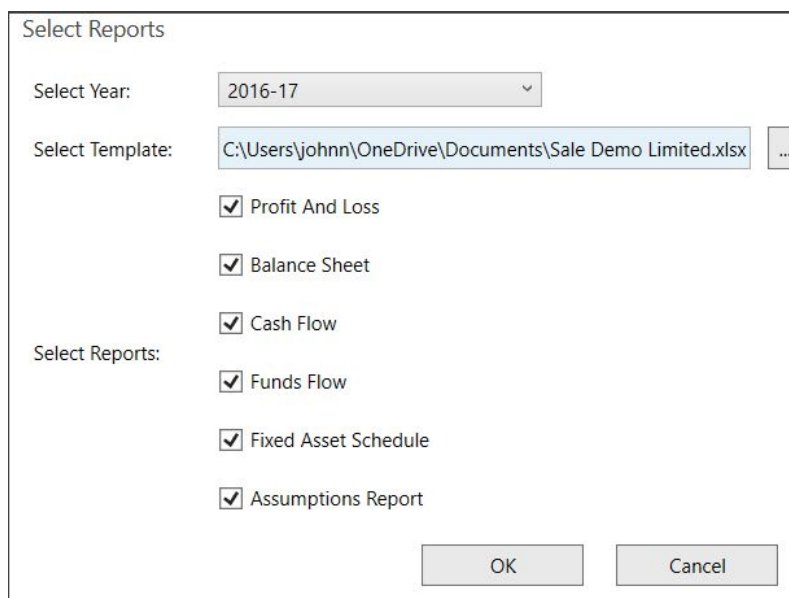
The One Touch Reporting (OTR) feature is designed to reduce the amount of time taken to produce final, quality reporting.

### Step by Step Guide

1. Select the one touch icon from the reports menu

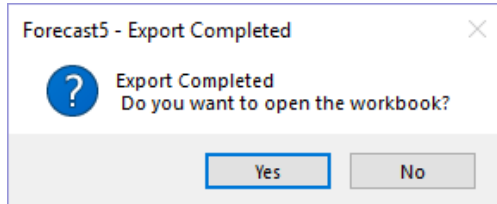


2. At the "Select Reports" screen, choose the year, select your preformatted Excel template and the reports you want printed. The Excel template can contain your company logo, disclaimer and any other information you want in the report, formatted entirely as you wish.

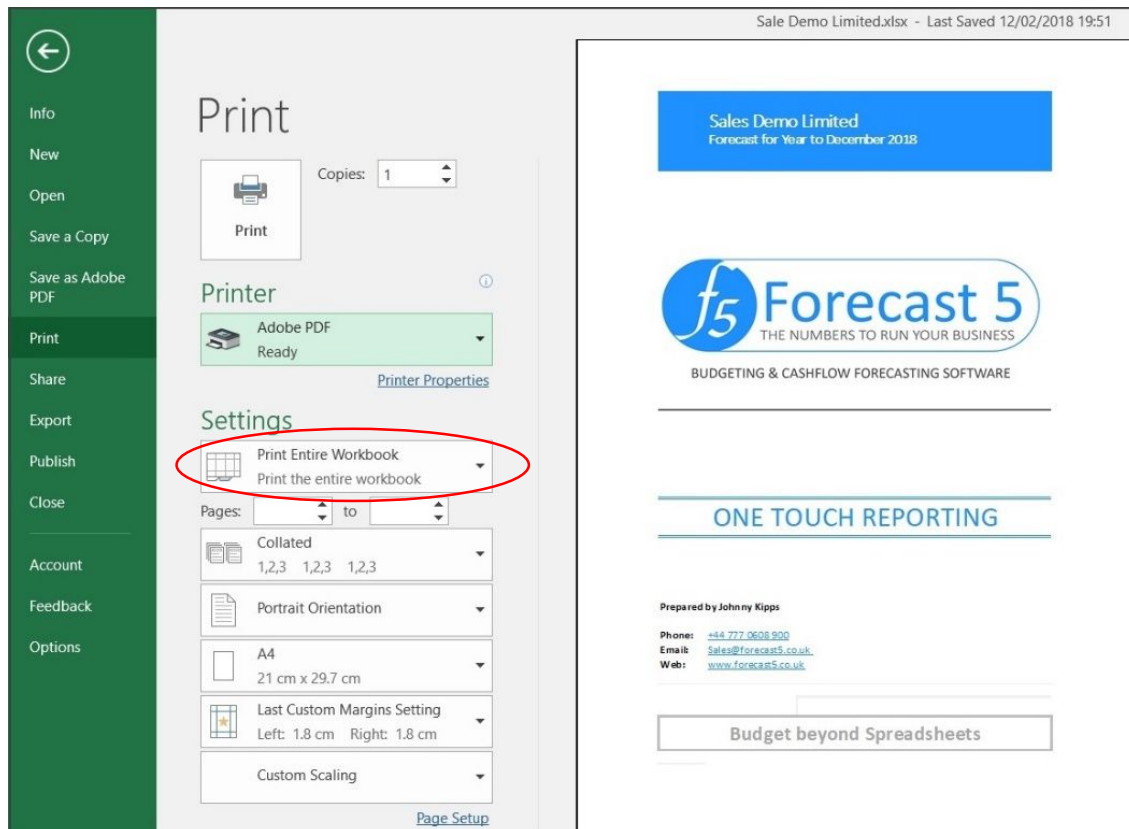


3. Once the export has completed, click Yes to automatically open the report. Once open, you will see each of the selected reports and preformatted pages are all their own tabs.

4.



5. By default, the report is renamed with your forecast name and is saved to the “Documents” folder on disk. And as you re-run the OTR for the particular forecast, the reports will continue to be re-saved to the “Documents” folder.
6. For a report with multiple years, return to Forecast 5 and rerun OTR, selecting the additional years, e.g. 2019, 2020, choosing the newly saved template and the subsequent year reports will be added as new sheets to the work book.
7. Finally, use Excel’s “Print the Entire Workbook” command and you have a professional quality suite of reports, completed in minutes.



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*accurate, trustworthy forecasts, Cashflows and Budgets for you and your clients.*

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