

Forecast 5: One Touch Reporting

Overview

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

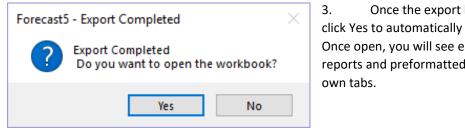
Step by Step Guide

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.

Select Year:	2016-17 ~			
Select Template:	C:\Users\johnn\OneDrive\Documents\Sale Demo Limited.xlsx			
Select Reports:	✓ Profit And Loss			
	✓ Balance Sheet			
	Cash Flow			
	✓ Funds Flow			
	✓ Fixed Asset Schedule			
	✓ Assumptions Report			



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



By default, the report is renamed with your forecast name and is saved to Windows 10 "Documents" folder as a security copy. And as you re-run the OTR for the particular forecast, the reports will continue to be re-saved to the "Documents" folder.

- 4. If you don't need the security copy you've saved your template somewhere else delete the security copy before re-running OTR to avoid conflicts. And remember to close any OTR workbook that might be open before running another with the same name normal Excel skills apply.
- 5. 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.

	Sale Demo Limited.xlsx - Last Saved 12/02/					
$(\boldsymbol{\epsilon})$						
Info	Print	Sales Demo Limited				
New		Forecast for Year to December 2018				
Open	Copies: 1					
Save a Copy	Print					
Save as Adobe PDF	Printer	Forecast 5				
Print	Adobe PDF Ready	THE NUMBERS TO RUN YOUR BUSINESS				
Share	Printer Properties	BUDGETING & CASHFLOW FORECASTING SOFTWARE				
Export	Settings	·				
Publish	Print Entire Workbook					
Close	Pages:	ONE TOUCH REPORTING				
Account	Collated					
Feedback	Portrait Orientation -	Prepared by John ny Kipps				
Options	A4 21 cm x 29.7 cm	Phones <u>+14 777 0608 900</u> Emails <u>Safes@Forecast5.co.uk</u> Webs <u>www.forecast5.co.uk</u>				
	Last Custom Margins Setting Left: 1.8 cm Right: 1.8 cm	Budget beyond Spreadsheets				
	Custom Scaling -					
	Page Setup					

- 6. Use Excel's "Print the Entire Workbook" command and you have a professional quality suite of reports, completed in minutes.
- 7. Finally, if you print to a pdf and the reports divide into multiple pdfs, go back and ensure that each page is formatted in Excel with Page Setup\Page set to "Page size" = A4, "Print Quality" = 600dpi



Page Setup			?	×
Page Margins Header/Footer Sheet				
Orientation				
A O Landscape				
Scaling				
● <u>A</u> djust to: 88 🔷 % normal size				
◯ <u>Fit</u> to: 1 → page(s) wide by 1 → ta	ili -			
Paper size: A4				~
Print <u>q</u> uality: 600 dpi				\sim
Fi <u>r</u> st page number: Auto				
1	Print	Print Preview	<u>O</u> ptions.	
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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.

Contact us at <u>sales@forecast5.co.uk</u> or visit us at <u>www.forecast5.co.uk</u> to download a trial, watch a demo and sign up for a live webinar.

Click Here To Download Our 21- Day Trial