

Auto-Reporting Guide

Last updated: 15th December 2023




This guide will show how to set up the Auto-Reporting feature so that your clients Business Overview Report will be automatically generated for you on a monthly basis.

Note: this feature is currently only available for clients using Xero or QuickBooks.

SETTING UP AUTO-REPORTING

Auto-Reporting can be enabled when creating/editing a client. The below process details how to enable Auto-Reporting when editing an existing client.

- 1) Go to the client 'Edit' page for the client either by clicking on 'Edit' next to the client in the client list.

Name	Type	Last Updated	Reporting Date	Progress	Operations
A Fictional Software Company	Grow & Exit	16/06/2021	May-2020		 
A Fictional Soft Play Centre	Grow & Exit	23/06/2022	Apr-2022	100.0%	Data Synced view edit 

or click 'Edit' from the client page



Client | A Fictional Soft Play Centre

Client Details **Edit** Client Settings

Name: A Fictional Soft Play Centre

Company Number: 123456789

Financial Year End: December

Connection Type: Grow & Exit

- 2) Tick the small box to select 'Auto-Reporting'.



Client | A Fictional Soft Play Centre | Edit

Auto-Reporting

- 3) Enter the delay, in days, from the month end to when you would like the report to be generated. This gives you some time to ensure the accounts are up to date on Xero/QuickBooks before the report is generated. If you typically have the accounts up to date within a week of month end, you may choose to enter a delay of 7 days. In which case, on the 8th of each month the reporting date will be updated to the previous month and the Business Overview Report generated.
e.g. if a delay of 7 were entered, then on the 8th of March the reporting date would be amended to February and new reports generated for you.