



## Frequently Asked Questions

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- **What is my initial username and password?**

USERNAME: admin

PASSWORD:

Leave the password field blank as there is no password.

- **Can I integrate my financial software to Forecast 5?**

Forecast 5 currently has an auto-connect option with SAP-B1, but is undergoing continued development in order to increase its auto-connections with other mid-space ERP systems. For example, development for successful auto-connection with Sybiz and Sage300 is currently in progress.

- **How many years can I budget?**

Forecast 5 allows up to 15 years of forecasted data in one forecast.

- **How many bank accounts can I have?**

There is no limit to the number of bank accounts or the currencies they can be in. To create a new foreign currency bank account, simply:

- Add a new bank account in the bank area and enter the currency it is in.
- Use a Separately Invoiced Sales record to specify into which bank account the funds are received.

- **Can I budget in currencies?**

Budgeting in currencies is easy – set up the currency and rates you want in the currencies tabs, and then in the applicable records select the correct currency and enter your data.

- **How do I import from Excel?**

To import from Excel, do the following:

1. Create the forecast in Forecast 5.
2. Export the forecast and paste it next to your Microsoft Excel budget.
3. Move the budget records inside the sections of your forecast.
4. Select and copy the spreadsheet.
5. Return to Forecast 5 and click on Import Record List.

- **How do I import my existing Sage WinForecast budgets?**

To import budgets from Sage WinForecast, do the following:

1. Set up the correct parameters in the target forecast within Forecast 5.
2. Create identical sections to your Sage WinForecast budgets.
3. Within Sage WinForecast, right-click the mouse and export the record list to the clipboard.
4. Change to Forecast 5 and click on the Import Record List button.
5. Amend the records to be the right type and terms.

For a demonstration on how to do this, a useful video is provided on forecast5.com under the FAQs subheading.

- **What are the minimum system requirements to run Forecast 5?**

- System Memory (RAM): 4 GB
- Processor (CPU): 1.6 Ghz Dual Core
- Free Hard Drive Space: 1 GB
- Operating Systems: Windows XP SP3 / 7/8, Windows Server 2003 / 2008 / 2012.
- Prerequisites: .NET Framework 4.0, Microsoft SQL 2008 or greater.

