

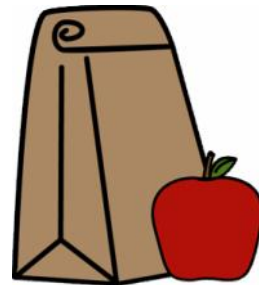


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SIMPLIFYING COMPLEXITY

# Lunch 'n Learn

## Maximize the Compass Add-In for Excel



Presented by: Jenny Mello & Lana Starchuk

# This Session is Designed For:



All versions of Compass

# Why the Add-In?

FINANCIAL COMPASS<sup>®</sup>  
DATA

- Combine Compass Reports
- Compare Compass Plans



FORMAT

- Specific Audience
- Certain View
- Export to Excel

# Maximize the Compass Add-In

## 1. Build a report from scratch

- Mix balance types
- Compare “what-if” scenarios

## 2. Layer into an existing excel report

- Compass exports
- Reports already built in Excel

## 3. Cash Flow Model Workbook

- Automate stress events

# Maximize the Compass Add-In

## Category/Account Data

*\*Data from the Account Projections*

What type of **DATA** is going to be in this report?

•i.e. volume, rates, maturities, repricings

What **DATE** do you want this data for?

What **Category and/or Accounts** from the Chart of Accounts will this data represent?

What **Compass Plan** should the data come from?

# Maximize the Compass Add-In

## *Computed Data*

*\*Data from Reports*

*What type of **DATA** is going to be in this report?*

- i.e. ratios, taxes, calculated totals*

*What **DATE** do you want this data for?*

*Will the data represent **Projections/Actuals or Budget**?*

*What **Compass Plan** should the data come from?*



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# Upcoming Events

*Compass Roundtable* - Friday, August 25<sup>th</sup> 2017

*Compass Advanced Coaching* - Friday, September 15<sup>th</sup> 2017

*Compass Roundtable* - Friday, December 15<sup>th</sup> 2017

## *Upcoming Lunch 'n Learns*

August – Model Housekeeping

October – Annual Webinar: Budgeting Best Practices

Check out [www1.plansmith.com/events](http://www1.plansmith.com/events) for more event info,  
or contact Jenny Mello at 800-323-3281 or [jenny@plansmith.com](mailto:jenny@plansmith.com)



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# Thanks for Attending!

If you have any questions,  
please contact us at **800-323-3281**  
or **support@plansmith.com**