# A - Z Features & Functionality


spotlight
reporting

**R** = Reporting  **D** = Dashboards  **F** = Forecasting  **M** = Multi

👆 Click on the feature name to find out more about it

| Features | Benefits | R | D | F | M |
|---|---|:-:|:-:|:-:|:-:|
| 24/7 Online Support | Support team in multiple territories covering all time zones. Weekend cover too. | ● | ● | ● | ● |
| Action Plans | Help your clients set, monitor and achieve goals - right within Spotlight! | ● | | ● | ● |
| Account groupings | Show accounts grouped as you want them - easy drag and drop functionality. | ● | | ● | ● |
| Benchmarking | Highlight over/under achievers with benchmarking and exception reporting. | | | | ● |
| Budget creation | Create a budget from imported data, prior year actuals or manual entry. | | | ● | |
| Cashflow Forecast | Create a profit & loss, balance sheet and cashflow forecast for up to 5 years. | | | ● | |
| Cashflow Statement | Traditional report to show where money was received and spent. | ● | | | |
| Cashflow Waterfall | Use our cash waterfall to visualise your cash ins & outs, and monitor liquidity. | ● | | ● | ● |
| Chart Gallery | 100+ charts pre-built for financials, non-financials, KPIs and industry metrics. | ● | ● | ● | ● |
| Categories/Segmentation reporting | Compare and contrast your Groups with category tags in Spotlight. | ● | | | ● |
| Consolidation | Consolidated P&L and Balance Sheet for multiple entities with multi-currency. | ● | | | ● |
| Customer Success Specialist | One on one assistance for easier onboarding and maximising returns. | ● | ● | ● | |
| Customisation | Flexible and scaleable - save time, effort and stress with reporrts & charts. | ● | ● | ● | ● |
| Dashboards | One page dashboards with three customisable layout options for clear focus. | | ● | | |
| Data edit capability | Editable data grid for quick data entry and adjustments. | ● | ● | ● | ● |
| Dynamic rules | Automatically calculate account values using formulas. | | | ● | |
| Entity reporting | Consolidate, compare and contrast different entities. | ● | | | ● |
| Excel Export/Import | Import from Excel. Export to Excel for additional customisation or manipulation. | ● | | ● | ● |
| Executive Summary | Editable text page with pre-built topics, auto text, image upload and custom text. | ● | | ● | ● |
| External Content (add) | Insert custom PDF or images into the Spotlight Report for board pack reporting. | ● | | | ● |
| Formula Gallery | Use formulas for bespoke charting - share/re-use these across your practice. | ● | ● | ● | ● |
| Franchise reporting | Fast, effective and beautiful reports for Head office and franchisee levels. | | | | ● |
| Google Analytics | Google Anayltics integration for website traffic and monitoring metrics. | ● | ● | | ● |
| Hospitality Industry Template | Pre-built template with charts and KPIs for hospitality businesses. | ● | | | ● |
| KPI Scorecard | Track, monitor, and then present visuals to manage KPIs for better outcomes. | ● | ● | | ● |
| Loan Amortisation Rules | Record interest and principal payments for new and existing loans in your forecast. | | | ● | |
| Multi-currency | Easy consolidation with auto foreign exchange calculations or user defined rates. | ● | | | ● |
| MYOB AccountsRight Live | Import actual and budget data from MYOB AccountsRight Live in one click. | ● | ● | | ● |
| MYOB AccountsRight (Desktop) | Import actual and budget data from MYOB AccountsRight Desktop in one click. | ● | ● | | ● |
| MyProsperity | Import personal wealth actual and budget data from MyProsperity in one click. | ● | | ● | |
| Not for Profit reporting | Build reports for non-profits. From single entity through to 500+ entity groups. | ● | ● | | ● |
| Non-financial reporting | Track, monitor, & then present non-financial business drivers for better outcomes. | ● | ● | | ● |
| Partner Success Centre | Best practice, with helpful tips to run the ultimate cloud advisory Practice. | ● | ● | | ● |
| PDF reports | Electronic or printed PDF reports for presentation to clients for maximum effect. | ● | ● | ● | ● |
| Professional Services Template | Pre-built template including metrics specific to the Professional Services industry. | ● | | | ● |
| Personal Wealth Reporting | Report on personal wealth and cash flow for couples and large family groups. | ● | | ● | |
| QBD (Desktop) | Import actual and budget data from Quickbooks Desktop at the click of a button. | ● | ● | ● | ● |

| Features | Benefits | R | F | D | M |
|---|---|---|---|---|---|
| QBO integration (incl. classes) | Import actual and budget data from Quickbooks Online at the click of a button. | ● | ● | ● | ● |
| Ranking Pages | Prepare consolidated reports that include a ranking of all entities in the group. | | | | ● |
| Retail Industry Template | Pre-built template including metrics specific to businesses in the Retail industry. | ● | | | ● |
| Report code mapping | Auto assigned report codes are used to map your chart of accounts into reports. | ● | ● | ● | ● |
| SaaS Industry Template | Pre-built template that includes metrics specific to the SaaS industry. | ● | | | ● |
| Sage50 | Import actual, budget and department data from Sage50 desktop in one click. | ● | | ● | |
| Sheep & Beef Industry Template | Pre-built template loaded with charts and KPIs for sheep and beef farmers. | ● | | | ● |
| Scenarios | Evaluate "what-if" scenarios - project feasibility, CAPEX, process changes. | | | ● | |
| Tax Schedules | Improved accuracy when forecasting the payment of different tax types. | | | ● | |
| Templates - Customisable | Work at scale by creating & saving your own templates to apply to other clients. | ● | ● | | ● |
| Tracking/Classes/Job imports | Import & filter reports based on category data from Xero, Quickbooks, MYOB. | ● | ● | | |
| US/UK Balance Sheet | Specific Balance Sheet layouts for US and UK users. | ● | | ● | ● |
| Visual Scorecard | Highlight & compare the performance of entities in your consolidated Multi group. | | | | ● |
| White-labelling | Build your own reports and present with your own branding, logos & colours. | ● | ● | ● | ● |
| WorkflowMax | WorkflowMax integration for practice management metrics. | ● | ● | | ● |
| Xero | Import actual and budget data from Xero at the click of a button. | ● | ● | ● | ● |
| Xero HQ | Set up alerts and more with our Xero HQ integration. | ● | ● | ● | ● |