**Getting Started - First Things First**

Before you start entering projects you need to:

1. Set up the information on your company in 'My Company Information'
2. Select in 'Report Preferences' the font, Project Information, date and 'My Company Information' required in the printed reports.

Purpose: To enable the reports to print the text data and the 'Disclaimer Statement' which will appear as labels in headers and footers in your reports.

**Process: 1. Setting up the information on 'My Company'**

1. Click on 'My Company Information' button on the Investit Pro panel, which appears before selecting a Template.
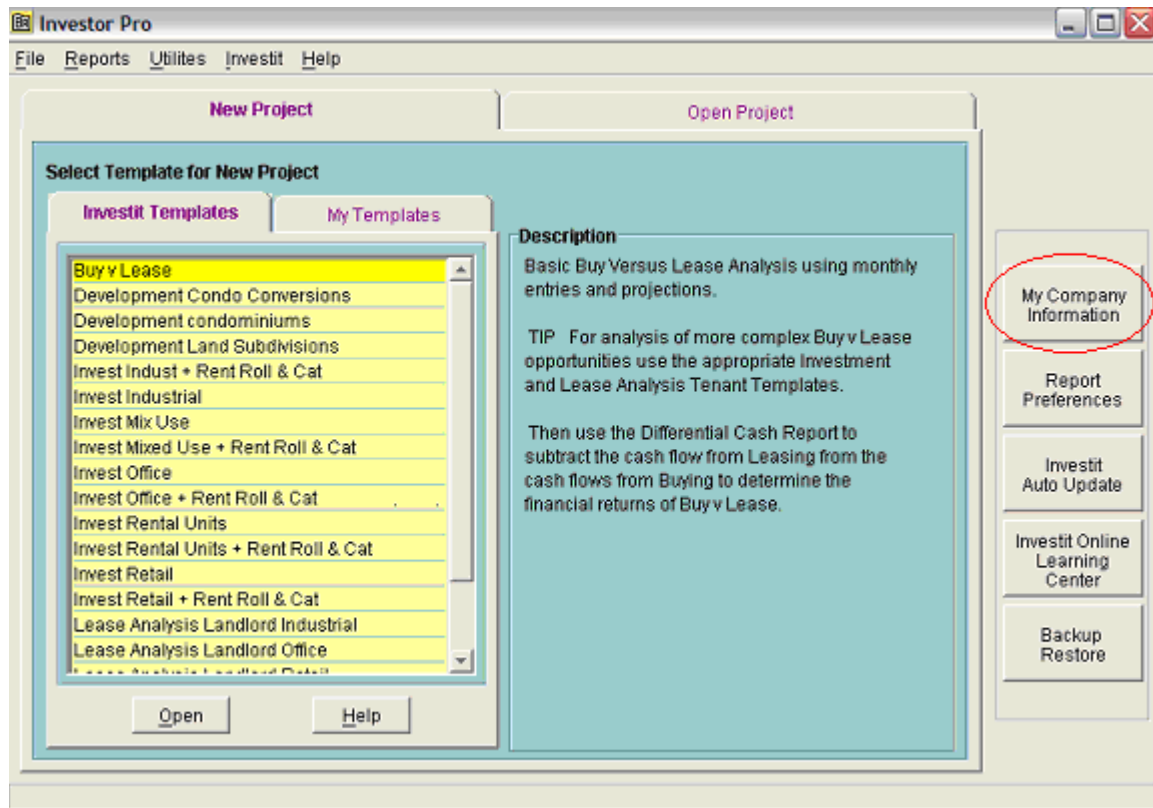
2. Enter your company and personal information

Alternatively, access My Company Information by clicking on the 'My Company Info.' button on the menu bar after selecting and opening a Template.

Note: See section on 'Which Template Should I Use' to choose a template appropriate for your project.
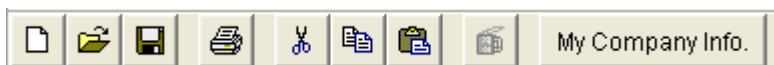
1. Enter your company, personal information and the disclaimer statement

My Company, Personal Information and Disclaimer Statement for Reports

Company Name	Omega Investments
Personal Name	Peter Manning
Address	1323 Green Ave.
City	Stanwood
State/Province	WA
Zip/Postal	98271
Country	USA
Phone Number	360-651-7241
Mobile Number	360-651-1234
Fax Number	360-651-1236
E-Mail	pmanning@earthlink.net
Website	omegainvest.com
Additional info	

Enter your Company Personal Information and:

1) Footnotes that you want printed at the bottom of each page such as brief Disclaimer Statement. The limit is 130 characters.

The footnote could be used to direct the reader to the Major Disclaimer Statement entered below.

2) Disclaimer Statement. Use this option if your Disclaimer Statement does not fit in 130 characters. The Disclaimer Statement is available as a separate report.

From the 'Reports Menu' - 'Report Prefrences' you can select certain entries from this screen that you wish to have printed on the reports.

Footnotes (Printed at the bottom of each page e.g, Brief Disclaimer or other footnote)

Enter disclaimer statement

Disclaimer Statement

☐ APPLY TO THIS PROJECT ONLY

Ok   Cancel   Help

APPLY TO THIS PROJECT ONLY: If checked applies the Report Preferences only to the project you are using.

Note: This box will be grayed out if you access the 'My Company Information' input dialog screen from the Investit Panel before a template is chosen and opened.

Setting up a Disclaimer Statement and Footnotes

There are two Disclaimer Statement options;

1. **Brief Disclaimer Statement or footnote** that is printed at the bottom of each page. Enter this type of Disclaimer Statement in the My Company Information dialog screen. The footnote Disclaimer Statement is limited to 130 characters. See below

2. **Expanded Disclaimer Statement** that is printed as a separate report. Use this if your Disclaimer Statement is longer than 130 characters. Click on the Disclaimer Statement button and enter your Disclaimer Statement in the Disclaimer Statement dialog screen. The Disclaimer Statement can then be printed from the **Report Menu** > General Information Reports > Disclaimer Statement.

A common approach with Disclaimer Statements is to use the brief Footnote Disclaimer Statement to direct the reader to the expanded Disclaimer Statement, which is separately attached to the presentation package.
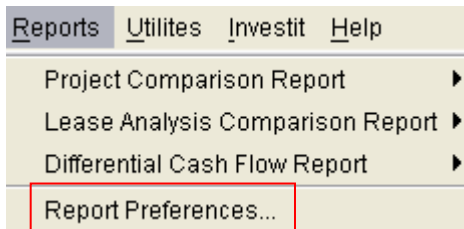
Footnotes (Printed at the bottom of each page e.g, Brief Disclaimer or other footnote)

Enter a brief Disclaimer statement or foonote here.
The limitation is 130 Characters

Disclaimer Statement

Process: 2. Setting up Report Preferences

1. Use Report Preferences to select what information you require to be printed on the reports and your preferred font. Report Preferences can be accessed from the Investit Panel or from the Report Menu after selecting and opening a Template.

Reports   Utilites   Investit   Help

   Project Comparison Report   ▶
   Lease Analysis Comparison Report ▶
   Differential Cash Flow Report   ▶
   Report Preferences...

Report Preferences allow you to select the company, personal and property information you require to be printed on:

   A) The Title Page
   B) All Reports

and allows you to select your preferred Font.

As an example you may elect to print your company's name, telephone number but not the address.

1. Click on 'Report Preferences' on the Investit Pro panel or after selecting and opening a template, click on the 'Reports' menu and then select 'Report Preferences'

2. Select the appropriate folder tab and check the information you wish to include in the 'Title Page' and 'All Reports'

3. Select the desired Fonts on the Fonts tab

Analyzer and Investor - Entry and Report Preferences

| Title Page | All Reports | Fonts |

☐ Show Today's Date

Show Property Information
☑ Property Name
☑ Property Description
☑ Property Address

☐ Additional Information

Show Company Information
☑ Company Name
☑ Personal Name
☑ Address
☐ Phone Number
☐ Mobile Number
☐ Fax Number
☑ E-Mail
☐ Web Site
☑ Additional Information

☐ Show Footnotes (e.g., Brief Disclaimer or other footnotes)

To change the 'Footnotes' go to 'Edit' menu and select 'My Company Information'

☐ APPLY TO THIS PROJECT ONLY

| OK | Cancel | Help |

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