Chapter 14: Producing graphs

You can use the graphs facility in BankLink Practice to display monthly figures in a simple to understand picture. Graphs can tell you at a glance, important facts about your client's business.

You can produce graphs of:

- Sales
- Payments
- Trading results
- Total bank balances
- A one-page summary

Figures in the graphs include all coded cash transactions as well as all journals, except GST journals and opening balances.

BankLink Practice has a set of default graph titles and headings. You can change the narrative of the default graph titles and headings to suit individual clients, see Setting up graph titles and headings for more information. Once you've set up headings and titles for one client, you can copy them to others.

Sales graph

This graph summarises client sales for each month of coded data.

You can choose to:

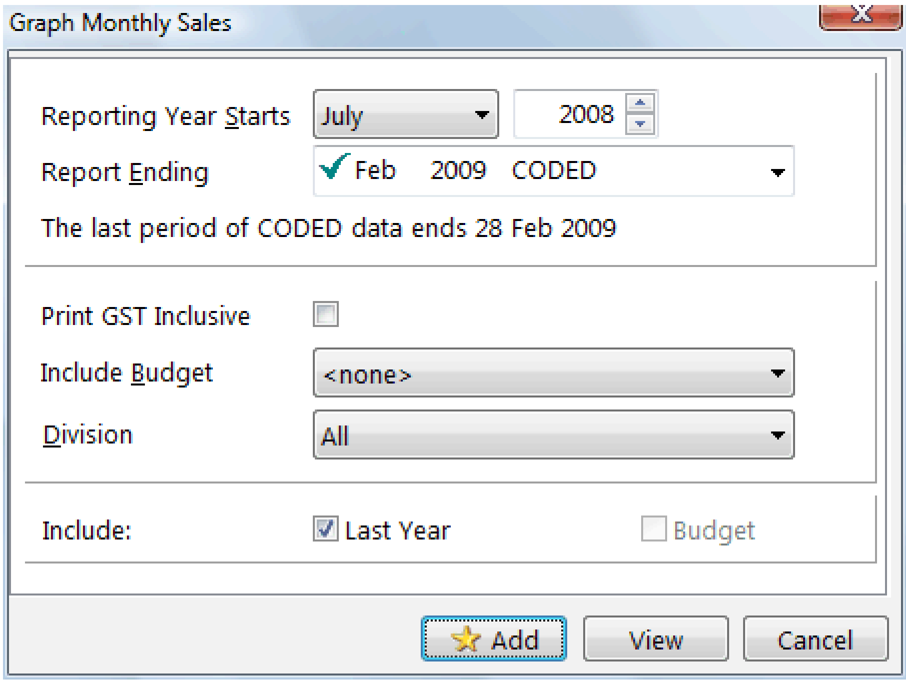
- include budgeted sales from a selected budget
- include sales from the last financial year
- produce the report GST inclusive or exclusive
- produce the graph for all divisions or for a single division

To produce a sales graph:

1 Open the client file for which you want to produce a sales graph

2 Click **Graphs, Sales**

BankLink Practice displays the **Graph Monthly Sales** window



3 Check the **Reporting Year Starts** field and alter if incorrect

4 Click in the **Report Ending** field and select a period - the default is the last period of coded data in the 12 months following the **Reporting Year Starts**

5 Enable the **Print GST Inclusive** check box if you want the graph to include GST

6 Click in the **Include Budget** field if you want to include a budget in the graph, and select the budget you want - BankLink Practice only lists those budgets whose **Start Month** is the same as the month of the **Reporting Year Starts** field

7 Click in the **Division** field and select:

- **All** to report on all divisions
- **1 - Division One**, **2 - Division Two** etc. to report on a single division

8 Set the **Include** field to:

- **Last Year** to display last year's sales

- **Budget** to display the budgeted sales - if you selected a budget to include

9 Click **Add** to save the graph as a Favourite Report with the setup shown, or

10 Click **View**

BankLink Practice displays the **Graph Output** window

11 Select from:

- **Preview** to view the graph on the screen prior to printing it
- **File** to save the graph in a PDF file
- **Print** to send the graph directly to your default printer
- **Cancel** to exit

Payments graph

This graph summarises trading payments for each month of coded data for the financial year.

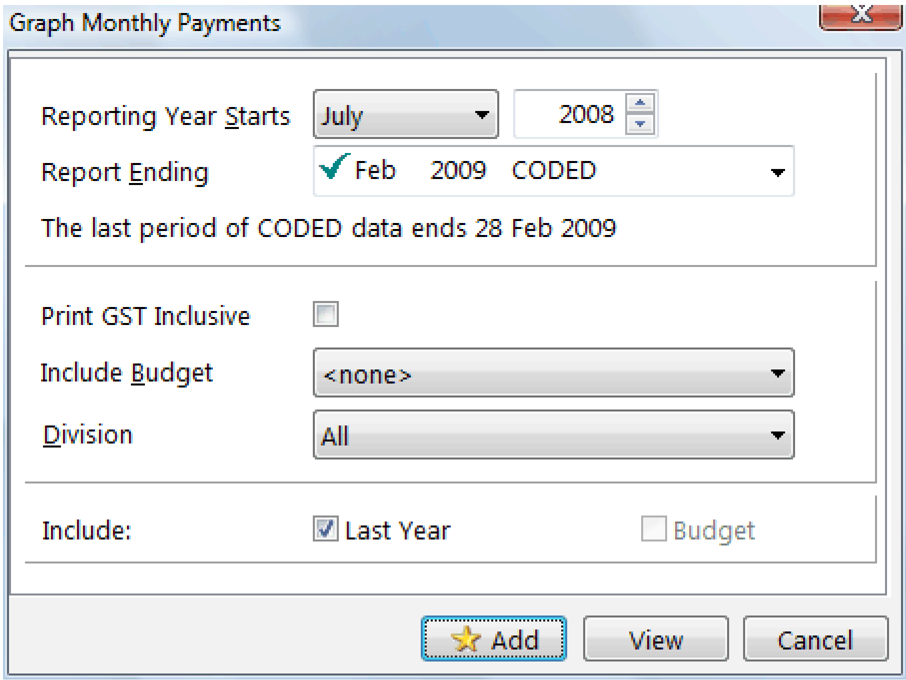
You can choose to:

- include budgeted payments from a selected budget
- include trading payments from the last financial year
- produce the report GST inclusive or exclusive
- produce the graph for all divisions or for a single division

To produce a payments graph:

1. Open the client file for which you want to set up a payments graph
2. Click **Graphs, Payments**

   BankLink Practice displays the **Graph Monthly Payments** window



3. Check the **Reporting Year Starts** field and alter if incorrect
4. Click in the **Report Ending** field and select a period - the default is the last period of coded data in the 12 months following the **Reporting Year Starts**
5. Enable the **Print GST Inclusive** check box if you want the graph to include GST
6. Click in the **Include Budget** field if you want to include a budget in the graph, and select the budget you want - BankLink Practice only lists those budgets whose **Start Month** is the same as the month of the **Reporting Year Starts** field
7. Click in the **Division** field and select:
   - **All** to report on all divisions
   - **1 - Division One**, **2 - Division Two** etc. to report on a single division
8. Set the **Include** field to:
   - **Last Year** to display last year's payments

- **Budget** to display the budgeted payments - if you selected a budget to include

9 Click **Add** to save the graph as a Favourite Report with the setup shown, or

10 Click **View**

BankLink Practice displays the **Graph Output** window

11 Select from:

- **Preview** to view the graph on the screen prior to printing it
- **File** to save the graph in a PDF file
- **Print** to send the graph directly to your default printer
- **Cancel** to exit

Trading results graph

This graph summarises trading results for each month of coded data for the financial year.

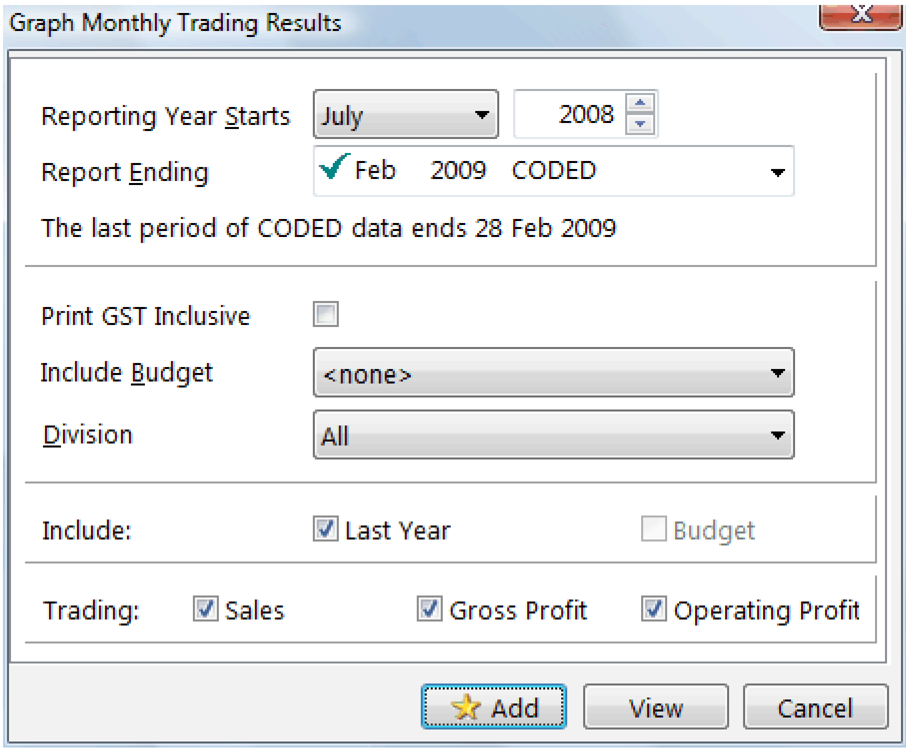
You can choose to:

- produce the report GST inclusive or exclusive
- include Last Year and/or Budget figures from a selected budget
- produce the graph for all divisions or for a single division
- show any or all of the following - sales, gross profit and operating profit

To produce a trading results graph:

1. Open the client file for which you want to set up a trading results graph
2. Click **Graphs, Trading Results**

   BankLink Practice displays the **Graph Trading Results** window



3. Check the **Reporting Year Starts** field and alter if incorrect
4. Click in the **Report Ending** field and select a period - the default is the last period of coded data in the 12 months following the **Reporting Year Starts**
5. Enable the **Print GST Inclusive** check box if you want the graph to include GST
6. Click in the **Include Budget** field if you want to include a budget in the graph, and select the budget you want - BankLink Practice only lists those budgets whose **Start Month** is the same as the month of the **Reporting Year Starts** field
7. Click in the **Division** field and select:
   - **All** to report on all divisions
   - **1 - Division One**, **2 - Division Two** etc. to report on a single division
8. Set the **Include** field to:

- **Last Year** to display last year's results
- **Budget** to display the budgeted amounts - if you selected a budget to include

9 In the **Trading** section, choose which of the following to include:

- **Sales**
- **Gross Profit**
- **Operating Profit**

10 Click **Add** to save the graph as a Favourite Report with the setup shown, or

11 Click **View**

BankLink Practice displays the **Graph Output** window

12 Select from:

- **Preview** to view the graph on the screen prior to printing it
- **File** to save the graph in a PDF file
- **Print** to send the graph directly to your default printer
- **Cancel** to exit

Total bank balances graph

This graph shows the total closing bank balance for all bank accounts attached to the client file for each month of coded data for the financial year.

You can choose to:

- include figures from the last financial year

To produce a bank balances graph:

1. Open the client file for which you want to set up a bank balance graph
2. Click **Graphs, Total Bank Balance**

   BankLink Practice displays the **Graph Total Monthly Bank Balance** window
3. Check the **Reporting Year Starts** field and alter if incorrect
4. Click in the **Report Ending** field and select a period - the default is the last period of coded data in the 12 months following the **Reporting Year Starts**
5. Set the **Include** field to **Last Year** if you want to display last year's bank balances
6. Click **Add** to save the graph as a Favourite Report with the setup shown, or
7. Click **View**

   BankLink Practice displays the **Graph Output** window
8. Select from:
   - **Preview** to view the graph on the screen prior to printing it
   - **File** to save the graph in a PDF file
   - **Print** to send the graph directly to your default printer
   - **Cancel** to exit

One-page summary

This graph summarises sales, trading payments, trading results and bank balances on one graph.

You can choose to:

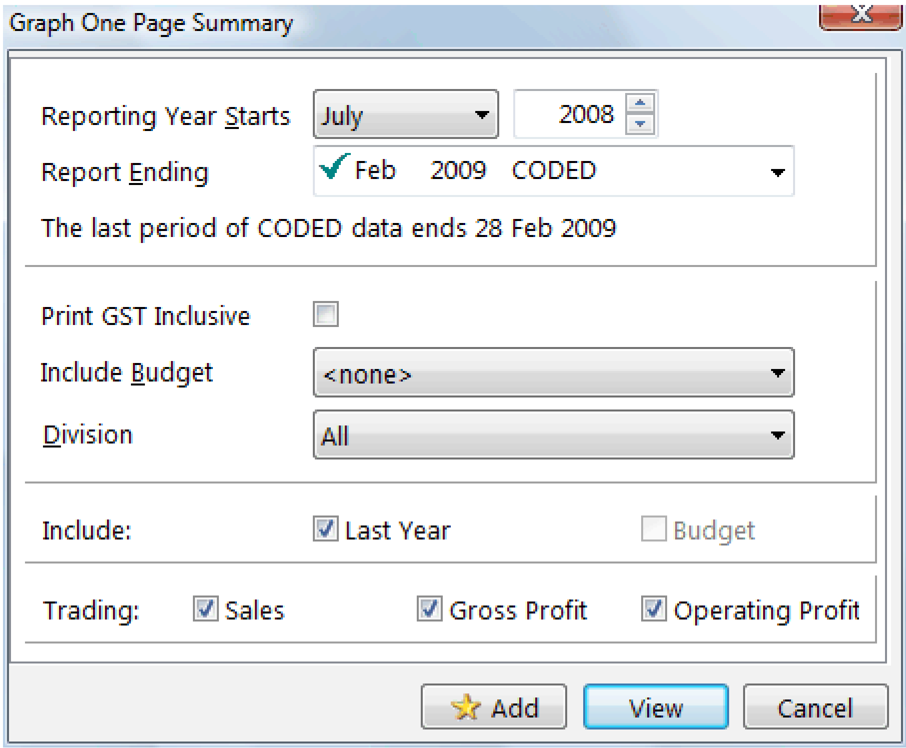
- include budget figures from a selected budget
- include figures from the last financial year
- produce the graph inclusive or exclusive of GST
- produce the graph for all divisions or for a single division

To produce a one-page summary graph:

1 Open the client file for which you want to produce a one-page summary

2 Click **Graphs, One Page Summary**

BankLink Practice displays the **Graph One Page Summary** window



3 Check the **Reporting Year Starts** field and alter if incorrect

4 Click in the **Report Ending** field and select a period - the default is the last period of coded data in the 12 months following the **Reporting Year Starts**

5 Enable the **Print GST Inclusive** check box if you want the graph to include GST

6 Click in the **Include Budget** field if you want to include a budget in the graph, and select the budget you want - BankLink Practice only lists those budgets whose **Start Month** is the same as the month of the **Reporting Year Starts** field

7 Click in the **Division** field and select:

- **All** to report on all divisions
- **1 - Division One**, **2 - Division Two** etc. to report on a single division

8 Set the **Include** field to:

- **Last Year** to display last year's sales, payments and bank balances
- **Budget** to display the budgeted sales - if you selected a budget to include

9 Choose which of the following to include on the **Trading** graph:

- **Sales**
- **Gross Profit**
- **Operating Profit**

10 Click **Add** to save the graph as a Favourite Report with the setup shown, or

11 Click **View**

BankLink Practice displays the **Graph Output** window

12 Select from:

- **Preview** to view the graph on the screen prior to printing it
- **File** to save the graph in a PDF file
- **Print** to send the graph directly to your default printer
- **Cancel** to exit

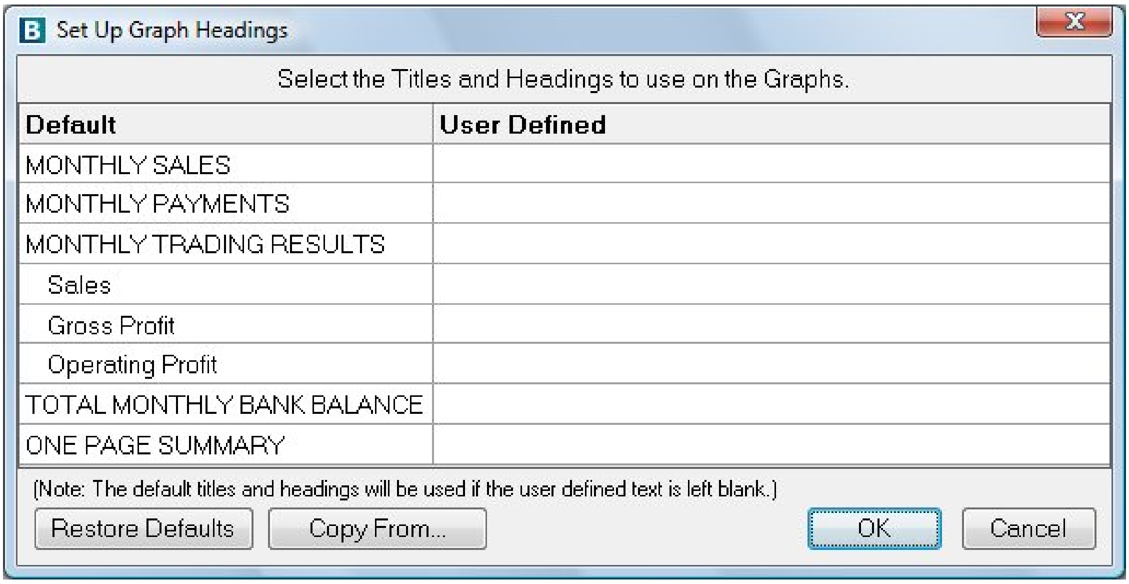
Setting up graph titles and headings

BankLink Practice has a set of default graph titles and headings. You can change the narrative of the default graph titles and headings to suit individual clients.

To change the graph titles and headings:

1 Click **Graphs, Set Up Titles and Headings**

BankLink Practice displays the **Set Up Graph Headings** window



2 Click in the **User Defined** column next to the heading you want to change

3 Enter your required Graph Title or Heading

4 Repeat the above for all headings that you want to change

5 Click **OK**

Leave the **User Defined** column blank if you want BankLink Practice to use the default report heading.

You can restore the default settings by clicking **Restore Defaults**

Once you have set up user-defined graph titles and headings for one client, you can copy from this client to another client.

To copy graph titles and headings from another client:

1 Click **Graphs**, **Set Up Titles and Headings**

BankLink Practice displays the **Set Up Titles and Headings** window

2 Click **Copy From**

BankLink Practice displays a list of available clients in the **Copy Headings from** window

3 Click on the client file from which you want to copy the report headings

4 Click **OK**

BankLink Practice re-displays the **Set Up Titles and Headings** window, showing the copied graph headings

5 Click **OK**