

Targetty Statement Getting Started Instructions

Welcome to Targetty Statement! This powerful tool is designed to be **easy to use** and **intuitive**, allowing you to define your own statements in one place. Whether you're preparing statutory reports, managerial reports, or KPI overviews, Targetty Statement makes it simple. You can even modify existing reports to suit your needs.

The process of getting started is straightforward: create an account, import your chart of accounts, create or import your statement structure, and export your hierarchy definition. You can then import this into your Power BI model and start creating financial reports.

And the best part? If you ever need help, our **support team** is just a call away. They're ready to assist you with any questions or issues you might have. So why wait? Dive in and discover the power of Targetty Statement today! 😊

Getting Started Instructions

1. Create an account using Microsoft account:

- Go to account.microsoft.com, select Sign in, and then choose Create one¹.
- If you'd rather create a new email address, choose Get a new email address, choose Next, and then follow the instructions¹.

2. Import your chart of accounts:

- In Targetty, you can import your chart of accounts which is a structured list of all accounts used by a business.
- The exact steps may vary depending on the specific version and settings of your Targetty software.

3. Create first statement or import your statement structure

- In Targetty Statement, you can define your own statements.
- You can prepare your own statutory or managerial reports and KPI overviews, or modify existing prepared reports according to your needs⁴.
- The exact steps may vary depending on the specific version and settings of your Targetty software⁴.

4. Export Targetty Statement hierarchy definition:

- The exact steps for exporting the hierarchy definition from Targetty Statement may vary depending on the specific version and settings of your Targetty software.

- Generally, you would navigate to the appropriate section of the software and select an option to export the hierarchy definition.

5. Import it to your Power BI model:

- In Power BI, you can create a hierarchy by selecting “Set up a hierarchy” from the New menu or “Manage hierarchies” from the All slicer.
- You can then map hierarchy levels to data by giving the hierarchy a name, building the levels, and mapping them to connected semantic models in your scorecard.

6. Create first financial reports:

- In Power BI, you can create financial reports by setting up your financial data in a compelling way⁶.
- You can create charts, graphs, tables, and other interactive visuals to present your financial data in a meaningful way.
- The exact steps may vary depending on the specific version and settings of your Power BI software.