

Valuatum Excel model QuickStart guide

Valuatum Excel model is the main tool for inputting and editing financial information. The model is connected to Valuatum's database, meaning that company models can be downloaded and uploaded easily by clicking a button. Information uploaded from the excel model is immediately available on the [Company Views](#) pages. An empty excel model can be downloaded from the [Analyst section](#).

Usage of Excel model

The most important part of the Excel model is the 'Main' sheet, and this guide will focus solely on this sheet. For a more complete guide, see the full user manual.

Basic information & functionality

The first seven rows of the model contain basic information, but critical, company information such as *Company name*, *Business ID*, *Industry code*, and *Currency*. The functionality buttons next to company information include:

1. **Download & upload buttons:** these buttons are used to move model data to and from our database by using your Valuatum credentials. Once the model has been uploaded, it can be viewed on the [Company Views](#) pages in the web platform. Notice that downloading information overwrites any existing information. User has the option to enter their email address when uploading a model if they wish to receive an email notification with a link to the company views pages after a successful upload.
2. **Clearing buttons:** Used to clear either everything, estimate values, or login information. Notice that once data has been cleared using these buttons, it cannot be restored unless it's saved to the database before clearing.
3. **Language & display precision selectors:** Used to select the language (Finnish or English) and display precision for all absolute values (millions, thousands, or units).

Income statement & Balance sheet

The rest of the Main sheet is divided into four sections: Year settings, Income statement, and Balance sheet for assets and liabilities.

1. Fiscal year settings: here you can define start and end dates for fiscal periods.
2. Income statement: here you can insert/edit a company's income statement data.
3. Balance sheet: here you can insert/edit a company's assets and liabilities data.

In the estimate periods, the latter two sections have several usability-enhancing features built into them, such as automatic balance sheet balancing. For more detailed information, refer to the full user manual.

Working with a company model

New company: Before starting with a new company, always click the *Clear all* button to clear any background data. Adding a new company begins with entering the *Company name*, *Business ID*, and *Industry code* (NACE standard is used, input 0000 if no industry is assigned) to the corresponding fields, as well as the start and end dates for at least one fiscal period. Note that the business ID is an 8-digit number and it must be unique for each individual company. After this, the rest of the desired financial data can be added. The minimum requirements for uploading a model are a balanced balance sheet and that net profit is reported equally in the financial statement and the balance sheet.

Existing model: Use the download from database button to fetch desired model into excel. After that you may edit any information. After you are done editing, click upload to database button to update the company model in our database. The updated model is visible on the company views pages immediately.

Customer Support

If you require assistance with the Excel model or the Valuatum system, please reach out to us via email at support@valuatum.com or via phone +358 45 123 0308.