

Dear Partners and Employees,

Please do follow the guidelines to format our reports, as it takes a long time to format the reports sent by you, before we can print the reports in Office. If you are printing the reports yourself, then pay more attention to the following points.

1. Use Verdana font throughout the report and annexures, including the Header and Footer. Many times, the Header and Footer are all in different fonts. Do a quick Ctrl+A and check font for the entire document and sheet

2. Please maintain font size at 10 throughout the report and ALL annexures. Do a quick Ctrl+A and check font size for the entire document and sheet

3. Make the documents "print ready".

- For annexures, make the page in Landscape orientation, if necessary.

- In excel sheets the page scale should not be below 65%. Use "Wrap text" and alignment to decrease the width of the page and ensure you select "Width: 1 page" and "Height: Automatic" for all Landscape sheets.

- Please use "print titles" to ensure that the top row of the table is repeated in ALL pages of the particular worksheet.

- Ensure that the Header is placed after pressing an "enter" in the Custom Header / Customs Footer dialog box, because, it gets cut on the printed sheet otherwise.

- Please format after selecting "A4" in the Page Layout dialog box. Last few reports were sent in "Letter" format, which are unacceptable.

- Please ensure that tables inserted in Word documents also fit in the margin of the rest of the document. Use the feature of "indent" to format the same

- Use uniform numbering / bullet system throughout the report.

- Using "Justify" alignment is COMPULSORY; except for headings. Also "justify" the text written in tables - both in Word and Excel.

- When using the "Wrap Text" option, please make sure that the cell height and width are adjusted to show the whole text in the print

4. Please do run a spellcheck in all reports and annexures. F7 is the shortcut key in MS Word and Excel. This is very important.

5. Kindly convert the reports and annexures into PDF and check the file for yourselves before sending for printing / review.

6. Maintain uniform headers and footers for all reports and annexures

7. Remove colours in tables. Some tables are copied and pasted from elsewhere and they do not adhere to the formatting

8. Use "Bold" "Italics" and "Underline" only is necessary. All heading of tables must be BOLD. Main headings may be Underlined. Use Italics, as per your judgement, only if absolutely necessary (for example, to highlight any qualification in the reports or any deviations)

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Chartered Accountants

9. Wherever the number is Zero (0) in the Annexures or tables, please do substitute with Dash "-". Another important aspect being ignored is to convert Values into "Number" format. Commas and **no decimal** places, please. Decimals may be used in necessary situations only. Decimals maybe used to report numbers in a Word document (for example - debtors balance in lakhs, etc)

10. Check and recheck: Name of the addressee / client and address; Firm Name and FRN; Name of Sir / Ma'am and their Membership numbers; Date of signing. For financial statements and other company law matters, ensure DIN is placed in the signature of the Director.

11. Please do not use short forms for name of the month in the signature. Make sure it is 21st January 2018, instead of 21st Jan 2018.

11. Remove all highlights before sending / saving for printing. Only then the person given the task of printing can finish the job without any doubt

12. Annexures: Please cross check the annexure numbers in the Table appearing in the reports with the actual annexures attached. Name the sheets in the excel workbook accordingly.

13. *Read the report once, before clicking the send button*

14. Ensure your Top sheets and Covering Letters are ready (and same procedures are followed).

Use all the wonderful features of Microsoft, to ensure legible reports and annexures. If we are taking assistance of other CAs and Articles, please ensure the above and then send for review / printing.

Ensure uniformity, so that we can have standard reporting formats and procedures.

Please do follow the above points and make it a habit, to ensure efficiency and better quality reports. We will also waste less time printing and will also lead to reduction in paper wastage!! Let's try and save paper, more importantly, let's save "Letterheads"

If anyone else who has faced any other difficulty when given something to print when you have not done the report, please raise your concerns and give in your suggestions for improvement!

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