



USER GUIDE

# ForesightXL

YOUR FORECASTING ASSISTANT

A complete step-by-step walkthrough for generating AI-powered, context-driven forecasts directly inside Microsoft Excel.

Getting Started

Building Inputs

Generating Forecasts

Understanding Outputs

Billing & Account

# 01

SECTION ONE

## Getting Started

Everything you need to launch ForesightXL for the first time - from finding the add-in in Excel's ribbon to signing in with your Microsoft account.

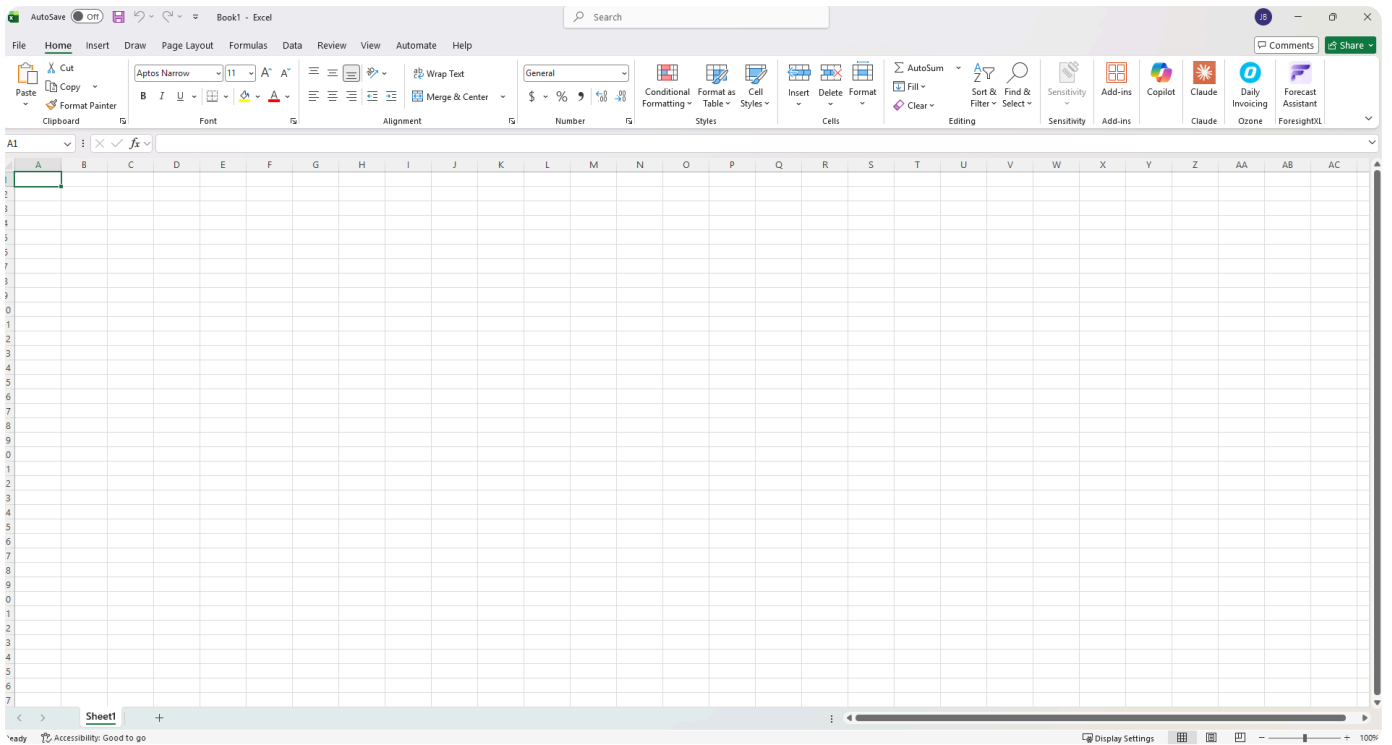
- Locating ForesightXL in the Excel ribbon
- Opening the Forecast Assistant panel
- Signing in with Microsoft

## 1

## GETTING STARTED

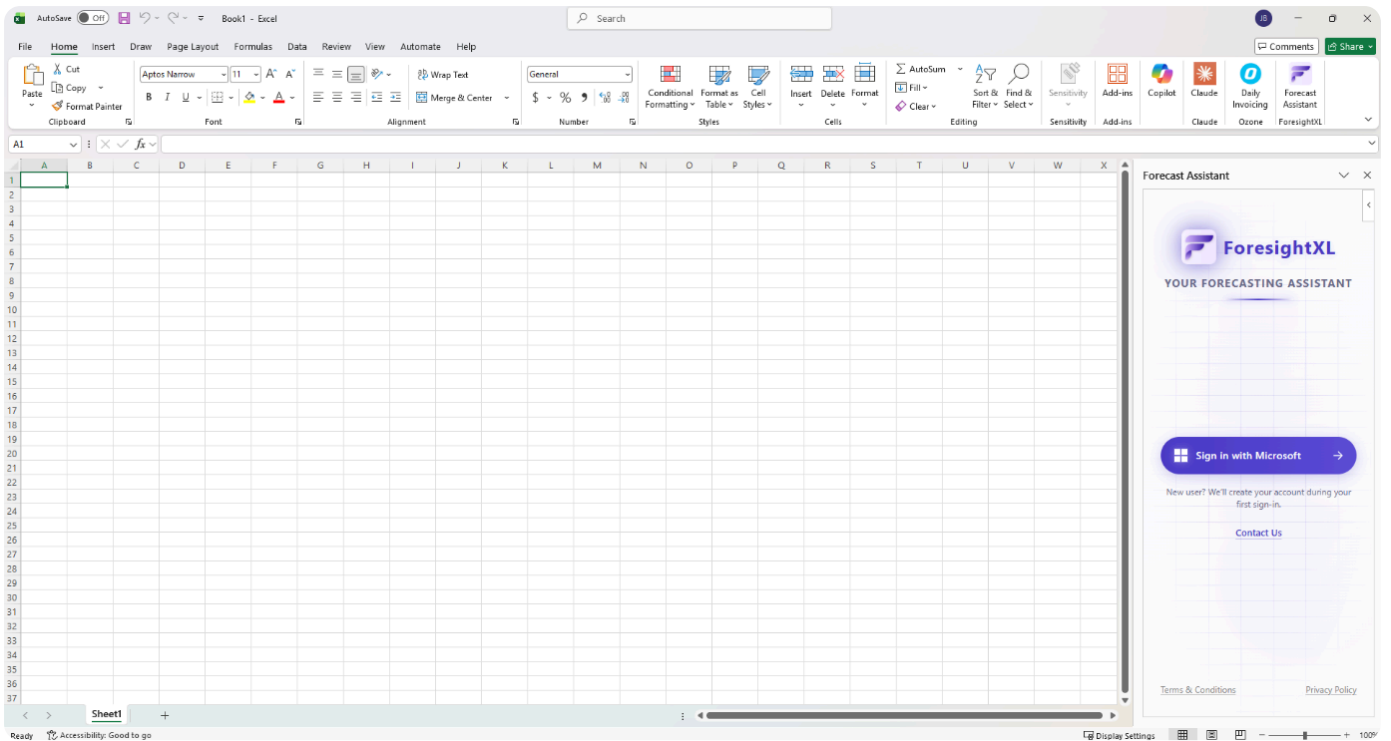
## Open Excel &amp; Find ForesightXL in the Ribbon

After installing the ForesightXL add-in from the Microsoft Store, open any Excel workbook. You will find the **ForesightXL** button in the far-right section of the Excel ribbon under the **Home** tab. Click it to open the Forecast Assistant panel.



**i** If you don't see ForesightXL in the ribbon, ensure the add-in has been installed via the Microsoft Store and is enabled under **Insert** → **Add-ins** → **My Add-ins**.

When you first open ForesightXL, the Forecast Assistant panel launches with the sign-in screen. Click **Sign in with Microsoft** to authenticate using your existing Microsoft 365 account. **New users:** your ForesightXL account is created automatically on first sign-in - no separate registration required.



**i** Links to **Terms & Conditions** and **Privacy Policy** are available at the bottom of the login screen. You can also reach the support team via the **Contact Us** link.

## The Forecast Assistant - Main Interface

Once signed in, the main Forecast Assistant panel is displayed. This is your control centre for every forecast. It contains three key sections: **Set Scope** (how many periods to analyse and forecast), **Add Context** (optional company URL and file uploads), and **Create Forecast** (the Generate button).

The screenshot displays the Microsoft Excel application window. The main interface is the Forecast Assistant panel, which is docked on the right side of the Excel window. The panel is titled "Forecast Assistant" and "ForesightXL". It contains three main sections: "SET SCOPE", "ADD CONTEXT", and "CREATE FORECAST".

- SET SCOPE:** This section allows users to define the time range for the forecast. It includes a "Past periods" dropdown menu set to 3 and a "Forecast periods" dropdown menu set to 5.
- ADD CONTEXT:** This section allows users to provide additional information for the forecast. It includes a "Company URL (optional)" text input field and a "Browse Files" button to upload data files.
- CREATE FORECAST:** This section contains a "Generate" button to initiate the forecast process.

The background shows the Excel spreadsheet with columns A through X and rows 1 through 17. The ribbon at the top includes tabs for File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, and Help. The ribbon is currently set to the "Home" tab, showing options for Clipboard, Font, Alignment, Number, Styles, Cells, Editing, Sensitivity, Add-ins, Capilot, Claude, Daily Invoicing, and Forecast Assistant.

# 02

## SECTION TWO

# Building Your Input

ForesightXL works from a structured Excel input sheet.

This section walks you through generating the template, entering your data, setting the forecast scope, and adding business context to improve forecast accuracy.

- Generate the input template with one click
- Rename rows and columns to match your data
- Set past and forecast period counts
- Add your company URL and supporting files
- Write free-text business context

# Generate the Input Template

If no input sheet exists yet, the panel will show *"No input template detected"* with a **Create** → button. Click **Create** and ForesightXL will instantly generate a structured **FSXL\_Input** sheet in your workbook - pre-formatted with rows for your forecast item, supporting drivers, and a context section.

The screenshot displays the Microsoft Excel interface with the ForesightXL Assistant panel open on the right. The main worksheet, titled "ForesightXL Input", is divided into two sections: "DATA INPUT" and "CONTEXT".

**DATA INPUT**

Line item	Period / Month 1 (rename)	Period / Month 2 (rename)	Period / Month 3 (rename)
Forecast item (rename, e.g. Total Revenue)	-	-	-
Supporting driver 1 (optional, e.g. Total Clients)	-	-	-
Supporting driver 2 (optional)	-	-	-
Supporting driver 3 (optional)	-	-	-

**CONTEXT** (input anywhere below this row)

The Foresight Assistant panel on the right includes a "Template loaded" indicator with a green checkmark, a "SET SCOPE" section with "Past periods" and "Forecast periods" dropdowns, an "ADD CONTEXT" section with a "Company URL (optional)" field, a "Choose files or drag them here" section with a "Browse files" button, and a "CREATE FORECAST" section with a "Generate" button.



An **FSXL\_Output** tab is also created at this stage, ready to receive your results once the forecast is generated.

The **FSXL\_Input** sheet contains the following rows - all of which can be renamed to match your business:

**Forecast item** - The primary metric you want to forecast (e.g. Monthly Recurring Revenue).

**Supporting drivers 1-3 (optional)** - Related metrics that help the AI model understand trends (e.g. Total Customers, Churn Rate).

**Period columns** - Rename each column header to the relevant time period (e.g. Jan 2025, Feb 2025). Enter your actual historical values in each cell.

The screenshot displays the Microsoft Excel interface with the 'ForesightXL Input' sheet. The sheet contains a table for data input and a context section. The table has four columns: 'Line Item', 'Period / Month 1 (rename)', 'Period / Month 2 (rename)', and 'Period / Month 3 (rename)'. The rows are: 'Forecast item (rename, e.g. Total Revenue)', 'Supporting driver 1 (optional, e.g. Total Clients)', 'Supporting driver 2 (optional)', and 'Supporting driver 3 (optional)'. The context section is currently empty.

The 'Foresight Assistant' sidebar is visible on the right, showing the following settings:

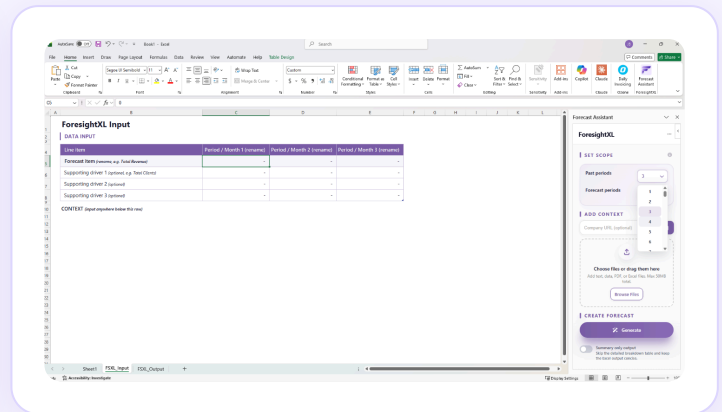
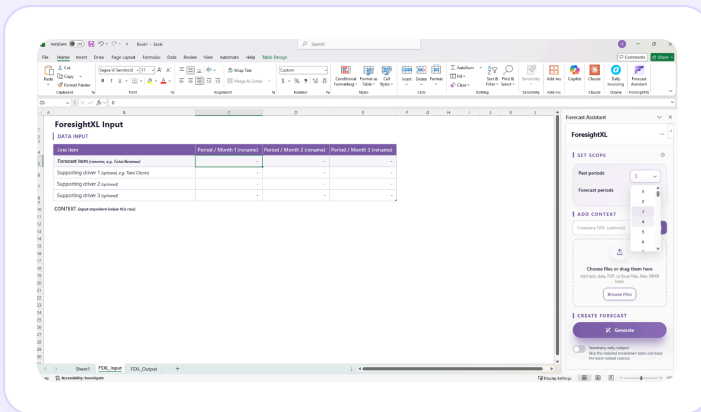
- SET SCOPE:** Past periods: 3, Forecast periods: 5
- ADD CONTEXT:** Company URL (optional): [Empty field]
- CREATE FORECAST:** Generate button
- Summary only output:** [Unchecked toggle]

# Set Your Forecast Scope

In the **Set Scope** section of the panel, configure how many periods ForesightXL should analyse and project:

**Past periods** - The number of historical periods from your input data for the model to learn from (e.g. 3 months).

**Forecast periods** - The number of future periods to generate forecasts for (e.g. 5 months ahead).



More past periods gives the model more data to detect trends. More forecast periods extends your outlook further - but forecasts naturally become less precise over longer horizons.

In the **Add Context** section, you can optionally enter your **Company URL**. ForesightXL will use your website to gather additional background about your business - industry, product, market positioning - which helps produce more relevant and accurate forecasts without requiring you to type it all manually.

The screenshot displays the Microsoft Excel interface with the 'ForesightXL Input' worksheet. The worksheet is divided into two main sections: 'DATA INPUT' and 'CONTEXT'. The 'DATA INPUT' section contains a table with the following structure:

Line item	Period / Month 1 (rename)	Period / Month 2 (rename)	Period / Month 3 (rename)
Forecast item (rename, e.g. Total Revenue)	-	-	-
Supporting driver 1 (optional, e.g. Total Clients)	-	-	-
Supporting driver 2 (optional)	-	-	-
Supporting driver 3 (optional)	-	-	-

The 'CONTEXT' section is currently empty, with a note: '(input anywhere below this row)'. On the right side of the Excel window, the 'Forecast Assistant' sidebar is visible. It includes the following controls:

- SET SCOPE:** 'Past periods' set to 3, 'Forecast periods' set to 5.
- ADD CONTEXT:** A text input field containing 'https://www.foresightxl.com/' with a file icon to its right.
- Choose files or drag them here:** A dashed box containing a 'Browse Files' button.
- CREATE FORECAST:** A large purple 'Generate' button.
- Summary only output:** A toggle switch that is currently turned off, with the text 'Skip the detailed breakdown table and keep the Excel output concise.'

**i** This field is optional but recommended. A publicly accessible website gives the model useful context about your business model and growth drivers.

# Upload Supporting Documents

Use the **file upload area** to attach any relevant documents that provide additional context for your forecast. Supported formats include **text files, PDFs, and Excel spreadsheets** up to a maximum of **50MB total**. Useful uploads include annual reports, financial statements, board packs, or market research.

The screenshot displays the Microsoft Excel interface with the 'ForesightXL Input' spreadsheet open. The spreadsheet is divided into two main sections: 'DATA INPUT' and 'CONTEXT'. The 'DATA INPUT' section contains a table with the following structure:

Line Item	Period / Month 1 (rename)	Period / Month 2 (rename)	Period / Month 3 (rename)
Forecast Item (rename, e.g. Total Revenue)	-	-	-
Supporting driver 1 (optional, e.g. Total Clients)	-	-	-
Supporting driver 2 (optional)	-	-	-
Supporting driver 3 (optional)	-	-	-

The 'CONTEXT' section is currently empty, with a note: '(input anywhere below this row)'. To the right of the spreadsheet is the 'Forecast Assistant' sidebar, which includes the following elements:

- SET SCOPE:** 'Past periods' set to 3, 'Forecast periods' set to 5.
- ADD CONTEXT:** A text input field containing 'https://www.foresightxl.com/' with a file icon.
- Choose files or drag them here:** A dashed box containing an upload icon, the text 'Add text, data, PDF, or Excel files. Max 50MB total.', and a 'Browse Files' button.
- Attached (1, 0MB):** A list showing 'CompanyFinancials.xlsx' with a close icon.
- CREATE FORECAST:** A 'Generate' button.

**i** Uploaded files are processed securely and are **not stored** in ForesightXL's databases. Forecast data is transmitted for processing only and discarded after your results are generated.

# Complete the Context Section in the Sheet

Before generating, review your **FSXL\_Input** table. The table does not need to be completely filled in - you only need a forecast item and at least one period of historical data to get started:

**Forecast item** - Rename and enter values for the primary metric you want to forecast (e.g. Monthly Recurring Revenue, Total Sales).

**Supporting drivers (optional)** - Rename and fill in related metrics that help the model understand what drives your forecast item. You can leave these rows empty or **insert additional rows** if you need more drivers.

**Period columns** - Rename each column to the relevant time period (e.g. Jan 2025) and enter your actual historical values. You can also insert additional columns for more periods.

Below the table is a **CONTEXT** row. Enter any free-text business context in the cells below it. The more context you provide, the more accurate your forecast will be. Consider including:

**Company overview · Product & pricing · Growth drivers · Seasonality · Competitive landscape · Upcoming events or constraints**

The screenshot displays the Microsoft Excel interface with the 'ForesightXL Input' table and the 'Forecast Assistant' sidebar. The table contains the following data:

Line item	Jan 2025	Feb 2025	Mar 2025
Monthly Recurring Revenue (\$)	485,000	512,000	538,000
Total Paying Customers	1,820	1,905	1,980
Average Revenue Per Account (\$)	267	269	272
Monthly Churn Rate (%)	3	3	3

Below the table, the 'CONTEXT' section contains the following text:

**CONTEXT (input anywhere below this row)**  
 Company: ExampleCompany — a mid-market B2B SaaS  
 Founded 2019, Series B funded (\$28M raised), Headquarters in  
 Product: Subscription tiers at \$199/mo (Starter), \$349/mo (Pro),  
 Growth drivers: Launched partner referral program in Feb 2025  
 Seasonality: Q1 is historically weakest (post-holiday budget)  
 Churn context: Churn declining due to improved onboarding  
 Competitive landscape: Main competitors are ServiceFlow  
 Near-term outlook: Expecting acceleration in Q2 from partner channel ramp, annual conference in May driving pipeline, and upcoming SOC 2 Type II certification opening regulated industry verticals.  
 Constraints: CAC payback is ~11 months. Gross margin is 78%. Net revenue retention is 112%. Sales team capacity limits new Enterprise deals to ~15-20 per month.

The 'Forecast Assistant' sidebar on the right shows the 'ADD CONTEXT' section with a URL input field containing 'https://www.foresightxl.com/'. Below this, there is a 'Choose files or drag them here' section with a 'Browse Files' button and an attached file 'CompanyFinancials.xlsx' (0MB). The 'CREATE FORECAST' section features a 'Generate' button and a 'Summary only output' toggle.

# 03

SECTION THREE

## Generating Your Forecast

With your inputs complete, ForesightXL does the heavy lifting - running its forecasting model against your data and context to produce a detailed, explained output.

- Choose between full or summary output
- Click Generate and monitor progress
- Review your completed forecast
- Copy the Executive Summary

Before generating, decide on your output preference using the **Summary only output** toggle:

**Toggle OFF (default)** - Full output generates a detailed forecast across a dedicated Output sheet and a Log sheet, including Forecast Components breakdown, explanations, and version tracking.

**Toggle ON** - Summary only output writes the forecast directly to the main Output page only. No separate log or output version sheets are created.

When ready, click the **Generate** button.

## CREATE FORECAST



Generate



**Summary only output**

Skip the detailed breakdown table and keep the Excel output concise.

Once you click Generate, ForesightXL begins processing. The panel displays a **live progress bar** along with a preview of the **Executive Summary** as it is being written. You can continue working in Excel while the forecast runs - there is no need to wait on the panel.

The screenshot shows the Microsoft Excel interface with the ForesightXL add-in. The main window displays the 'ForesightXL Input' section, which includes a 'DATA INPUT' table and a 'CONTEXT' section. The 'DATA INPUT' table has the following data:

Line item	Jan 2025	Feb 2025	Mar 2025
Monthly Recurring Revenue (\$)	485,000	512,000	538,000
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Constraints: CAC payback is ~11 months. Gross margin is 78%. Net revenue retention is 112%. Sales team capacity limits new Enterprise deals to ~15-20 per month.

The 'Forecast Assistant' panel on the right shows the 'ForesightXL Results' section. It includes a 'Written to:' field, a 'Last update:' field, and a preview of the 'EXECUTIVE SUMMARY'. Below the preview is a 'Generating forecast...' button and a progress bar showing 34% completion.

**i** Generation typically completes in under a minute depending on the amount of context and the number of forecast periods requested.

When complete, ForesightXL writes the full results to the **FSXL\_Output** sheet. The output includes five key components:

**Executive Summary** - A written narrative explaining the forecast rationale, key drivers, and risks.

**Actuals vs Forecast Chart** - A line graph comparing historical data to projected values.

**Forecast Result Table** - Period-by-period forecast values with plain-English explanations for each period's movement.

**Forecast Components Table** - A detailed breakdown of every component contributing to each forecast figure.

**Three Suggestions** - The AI model provides three tailored suggestions to improve your business context, helping you maximise the quality of your next forecast output.

The screenshot displays the Microsoft Excel interface with the 'ForesightXL Output' sheet selected. The sheet contains the following components:

### Forecast Result

Forecast Period	Forecast Result	Forecast Explanation
Apr-25	515,667	Baseline lifted by mild Q2 timing and demand gains, partly offset by enterprise. Strongest uplift month.
May-25	520,167	recurring and event boosts outweigh capacity drag. Core demand remains strong; constraints absorb part of upside from timed catalysts.
Jun-25	518,667	Growth continues with moderating timing/event effects and a larger capacity headwind. Net positive month led by durable drivers, though constrained by sales capacity.
Jul-25	516,667	
Aug-25	515,167	

### Forecast Components

Forecast Period	Mathematical Baseline	Baseline Adjustment	Baseline Adjustment (Explanation)	Recurring Effects	Recurring Effects (Explanation)	Business Drivers
Apr 2025	511,667	-		2,000	Q2 demand seasonality expected stronger than baseline, so a mild positive Q2 timing tailwind peaks	4,500
May 2025	511,667	-		3,000	around May, above the flat baseline seasonal profile. Q2-Q3 transition keeps a positive timing delta, but less than May peak.	5,500
Jun 2025	511,667	-		2,500	Positive seasonal timing delta persists into Q3 but normalizes from Q2 highs.	6,000
Jul 2025	511,667	-		1,500	Timing benefit remains mildly positive versus baseline, with further normalization.	6,500
Aug 2025	511,667	-		1,000		7,000

The Forecast Assistant sidebar on the right shows the following information:

- ForesightXL Results**
- Written to: FSXL\_Output + FSXL\_Output\_001
- Last update: 10/04/2026, 2:13:57 pm
- EXECUTIVE SUMMARY**
- Revenue is expected to trend upward from the current run-rate, supported by partner referrals, improving churn, and stronger Q2 demand conditions. With a flat statistical baseline of 511666.67 per month, we apply modest positive judgement in Apr-Aug, with the strongest uplift around May-June due to conference and certification timing, while preserving caution given the very short history.
- Forecast complete! (Copy button)
- Progress: 100%

## Copy the Executive Summary

Once the forecast is complete, the full **Executive Summary** is displayed directly in the side panel alongside your output sheet. Click the **Copy** button to copy the narrative text to your clipboard - ready to paste into a board report, email, or presentation. The panel also shows the output sheet names and the timestamp of the last update.

The screenshot displays the Microsoft Excel interface with the ForesightXL forecast output and the Forecast Assistant side panel. The main window shows the 'ForesightXL Output' sheet with an 'Executive Summary' and a 'Forecast Result' table. The Forecast Assistant side panel is open, showing the 'ForesightXL' results and a 'Summary only output' toggle.

**Executive Summary**

Revenue is expected to trend upward from the current run-rate, supported by partner referrals, improving churn, and stronger Q2 demand conditions. With a flat statistical baseline of 511666.67 per month, we apply modest positive judgement in Apr-Aug, with the strongest uplift around May-June due to conference and certification timing, while preserving caution given the very short history.

The main upside drivers are partner channel momentum, upgrade mix improvement, and seasonal Q2-Q3 demand strength. The key risk is enterprise sales capacity, which may cap conversion of higher-value opportunities and temper upside in peak months. Overall, the outlook is positive but constrained, with growth expected to be steady rather than unconstrained.

**Forecast Result**

Forecast Period	Forecast Result	Forecast Explanation
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**Forecast Components**

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Aug 2025	511,667	-		1,000	Timing benefit remains mildly positive versus baseline, with further normalization.	7,000

**Forecast Assistant**

**ForesightXL**

Summary only output  
Skip the detailed breakdown table and keep the Excel output concise.

**Results**

Written to FSXL\_Output + FSXL\_Output\_001  
Last update: 10/04/2026, 2:13:57 pm

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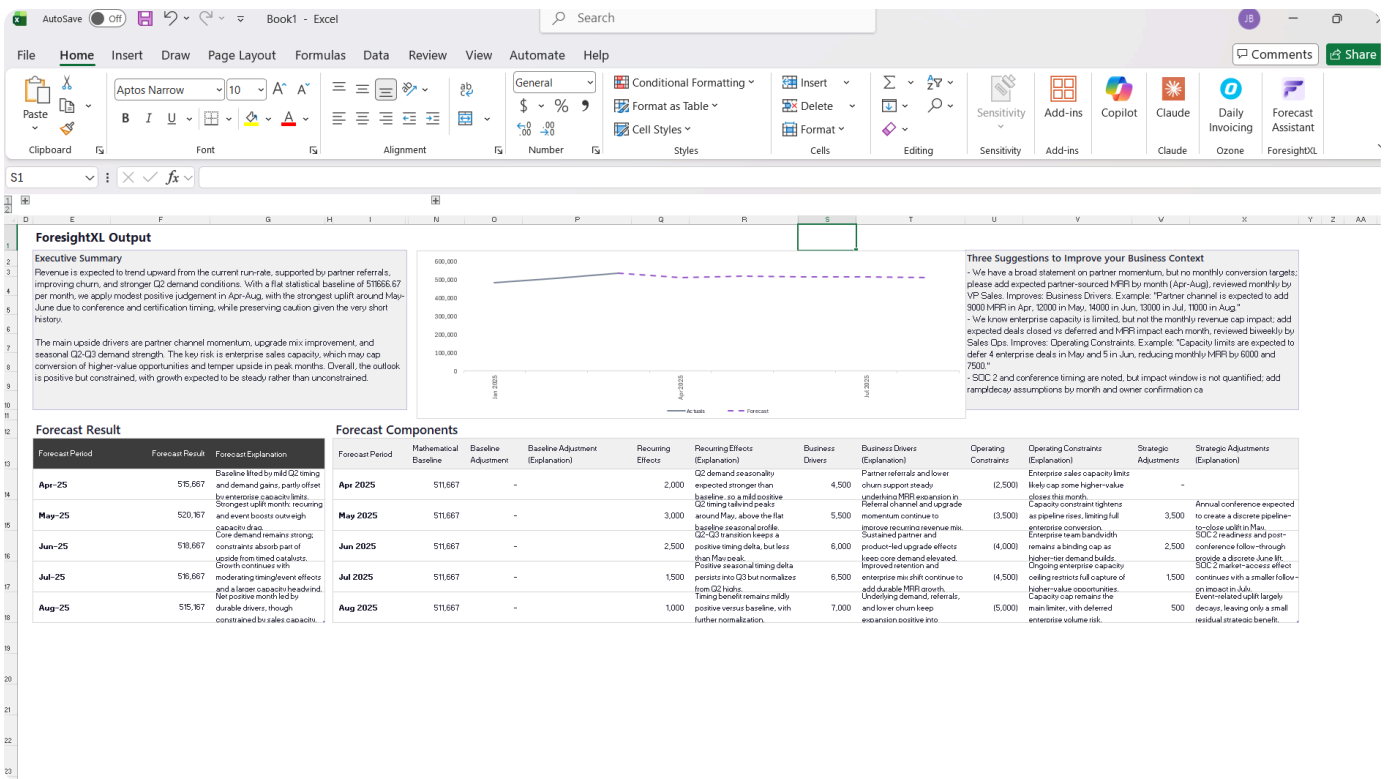
# 04

## SECTION FOUR

# Understanding Your Output

A guide to every section of the ForesightXL Output sheet and how version history is automatically maintained across multiple forecast runs.

- Executive Summary - the narrative
- Forecast Result - period values & explanations
- Forecast Components - the full breakdown
- Three Suggestions - improve your next forecast
- Automatic versioning with Log and Output tabs



**Executive Summary** - A written narrative explaining what is driving the forecast, key risks, and the overall outlook.

**Actuals vs Forecast Chart** - Visual comparison of historical and projected values on a single line chart.

**Three Suggestions** - AI-generated recommendations for improving your context inputs on the next run.

**Forecast Result** - The final projected value for each period with a plain-English explanation of what drove that number.

**Forecast Components** - A full audit trail: Mathematical Baseline → Recurring Effects → Business Drivers → Operating Constraints → Strategic Adjustments.

Every time you run a forecast, ForesightXL automatically creates two versioned sheets:

**FSXL\_Log\_001, \_002, ...** - A log record of each generation run, capturing the inputs and settings used.

**FSXL\_Output\_001, \_002, ...** - A snapshot of that run's full output, so previous forecasts are never overwritten.

This means you can always compare forecasts across different runs and see how your projections evolve as you refine your inputs and context.

**Note:** If the **Summary only output** toggle is on, these versioned sheets will not be created - the forecast is written directly to the main Output page only.

Sheet1

FSXL\_Input

FSXL\_Output

FSXL\_Log\_001

FSXL\_Output\_001

**Accessibility: Investigate**

**i** The **FSXL\_Output** tab always shows the most recent forecast. Versioned tabs (**\_001, \_002**, etc.) preserve every previous run for your records.

# 05

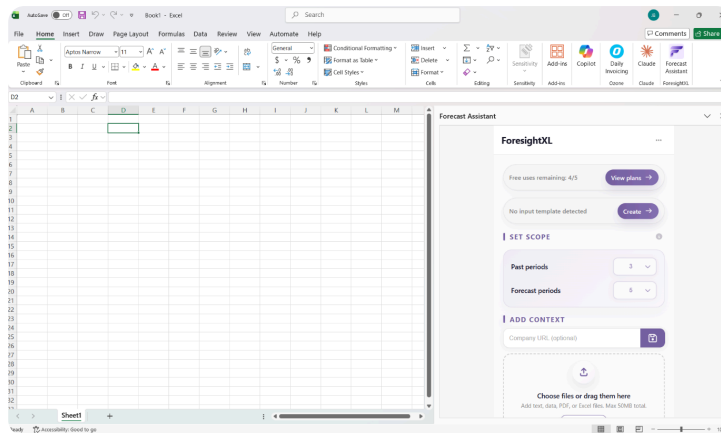
SECTION FIVE

## Account & Billing

Manage your subscription, upgrade to Pro, assign seats to team members, and access documentation, support, and legal resources - all from within the add-in.

- Free trial - 5 forecasts included
- Accessing your account menu
- Viewing and managing your subscription
- Upgrading to Pro - billing period, seats & checkout
- Assigning seats to your team
- Documentation, support & legal links
- Terms of Service & Privacy Policy

All new users receive **5 free forecast generations** upon signing in with Microsoft - no credit card required. The remaining free uses are displayed at the top of the panel. Once your free uses are exhausted, you will be prompted to upgrade to a Pro subscription to continue generating forecasts.



**i** Click **View plans** → at any time to explore subscription options before your free uses run out.

Click the ⋮ (three-dot menu) in the top-right corner of the ForesightXL panel header to access your account options. The menu displays your name and email address, along with the following links:

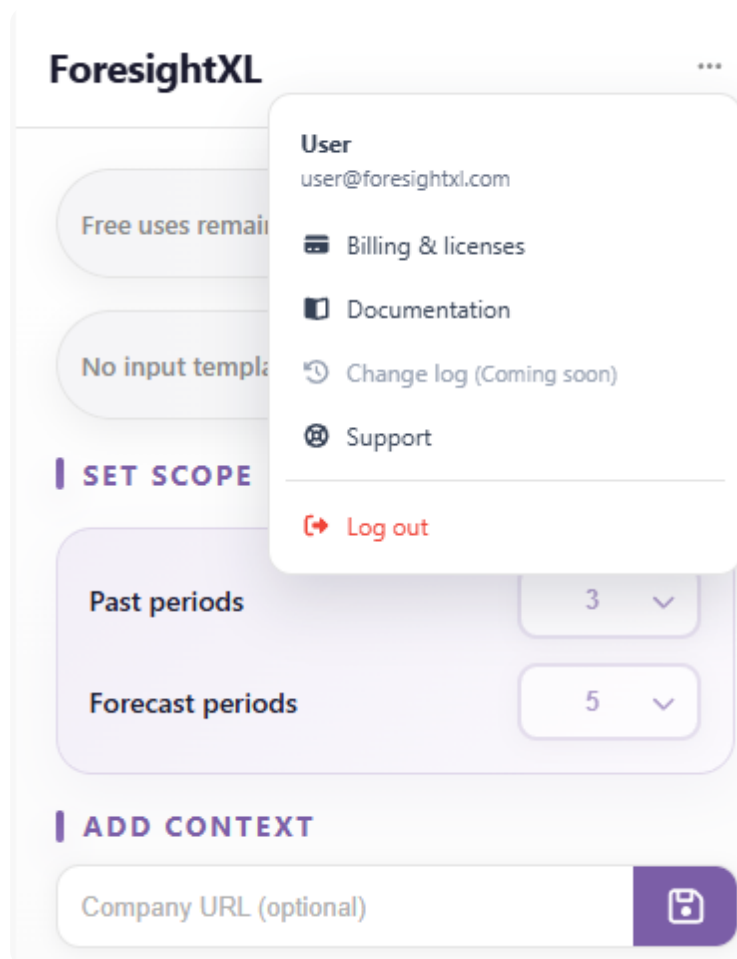
**Billing & licenses** - Manage your subscription, seats, and payment details.

**Documentation** - Opens the ForesightXL website with full product documentation.

**Change log** - View the latest product updates and release notes.

**Support** - Get help from the ForesightXL support team.

**Log out** - Sign out of your account.



The **Billing & licenses** screen shows your current subscription status at a glance, including your access level, free uses remaining, renewal date, cancellation status, and seat allocation. To upgrade, use the **Upgrade to Pro** section below the status card.

**Billing & licenses**

**CURRENT STATUS**

User:	user@foresightxl.com
Access:	Active
Free uses remaining:	4
Renews / ends:	-
Cancellation status:	Not scheduled
Seats:	0 / 0 assigned

**Upgrade to Pro**

Pro is \$19 USD / seat / month, or 1 month free if you pay yearly.

USD Monthly

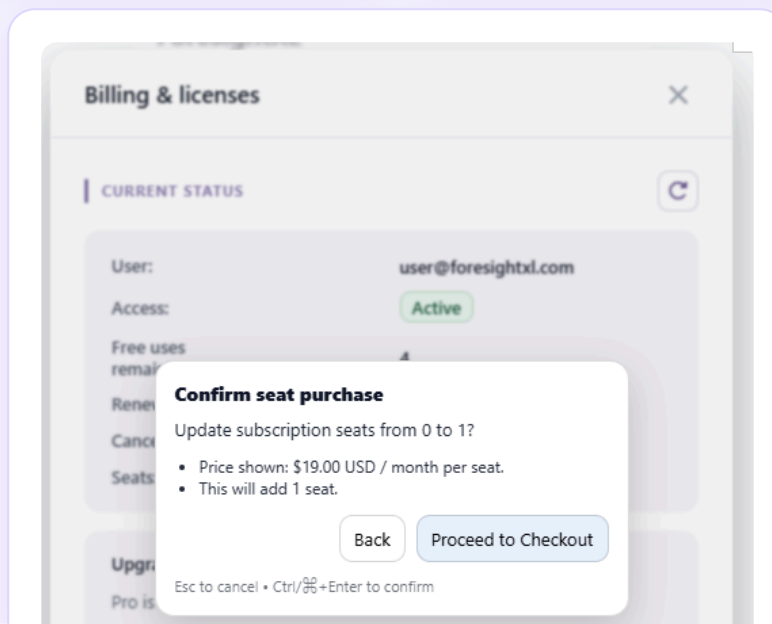
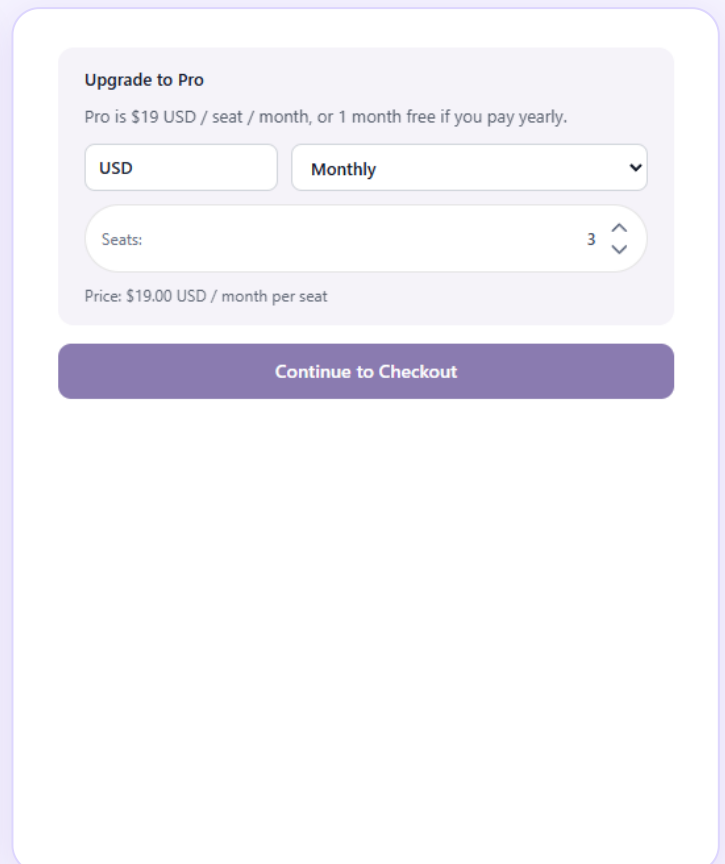
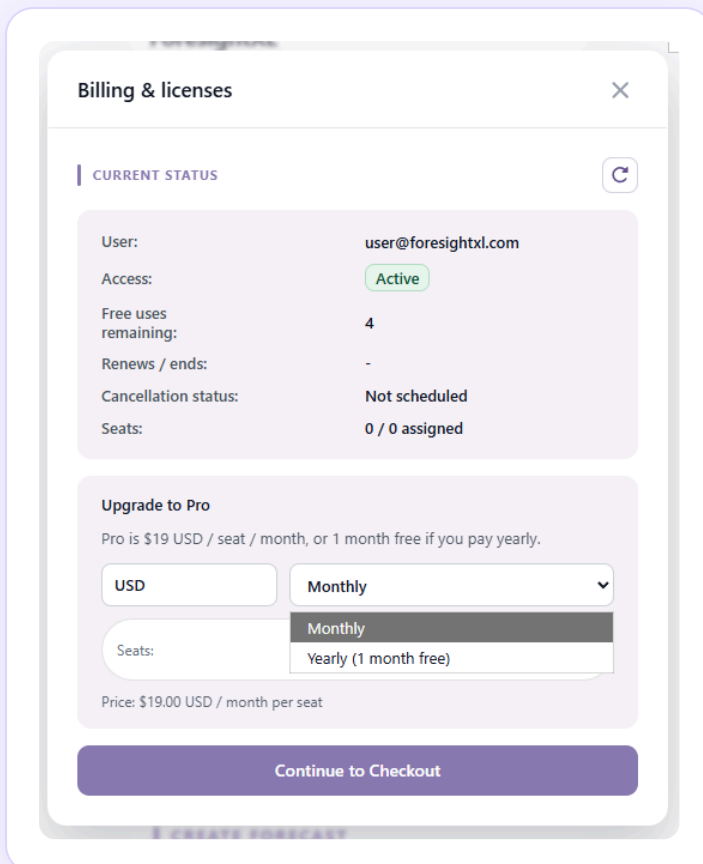
Seats: 1

Price: \$19.00 USD / month per seat

**Continue to Checkout**

ForesightXL Pro is priced at **\$19 USD per seat per month**, with a **1-month discount if you pay yearly**. To upgrade:

1. Select your preferred billing period - **Monthly** or **Yearly (1 month free)**.
2. Set the number of seats required using the seat counter.
3. Review the total price, then click **Continue to Checkout**.
4. Confirm the seat purchase in the confirmation dialog.
5. Complete payment via the **Stripe** secure checkout (card or Pay with Link).



After confirming your seat purchase, you are taken to a **Stripe-powered checkout page** - fully embedded within the add-in panel. Enter your card details and complete the payment. Once successful, your **Billing & licenses** screen will update to show your active subscription, token usage, renewal date, and assigned seats.

The screenshot shows a checkout page for 'ForesightXL Pro' with a price of '\$19.00 per month'. It features a green 'Pay with link' button, an email field with 'user@foresightxl.com', and a 'Payment method' section for a card. The card information includes a masked number '1234 1234 1234 1234', MM / YY, CVC, and cardholder name. The country is set to 'Australia'. A checkbox at the bottom is checked for 'Save my information for faster checkout'.

The screenshot shows the 'Billing & licenses' screen with a 'CURRENT STATUS' section. The status is as follows:

User:	user@foresightxl.com
Access:	Active
Free uses remaining:	4
Renews / ends:	-
Cancellation status:	Not scheduled
Seats:	0 / 0 assigned

**i** Payments are processed securely by **Stripe**. ForesightXL does not store your payment card details.

ForesightXL supports multi-seat subscriptions. From the **Billing & licenses** screen:

**Add seats** - Increase the seat count and click **Update Seat Count**.

**Assign a seat** - Enter a team member's email and click **Assign Seat**. They can access Pro immediately.

**Remove a seat** - Click **Remove** next to any assigned user to free that seat.

**Manage Billing** - Opens the Stripe billing portal for payment methods and invoices.

## Forecast Assistant



### Billing & licenses



Update Seat Count

Manage Billing

#### SEATS YOU PURCHASED

teammate@company.com

Assign Seat

Assigned 2 of 4 seats in your subscription.

user@foresightxl.com

assigned

Remove

admin@foresightxl.com

assigned

Remove

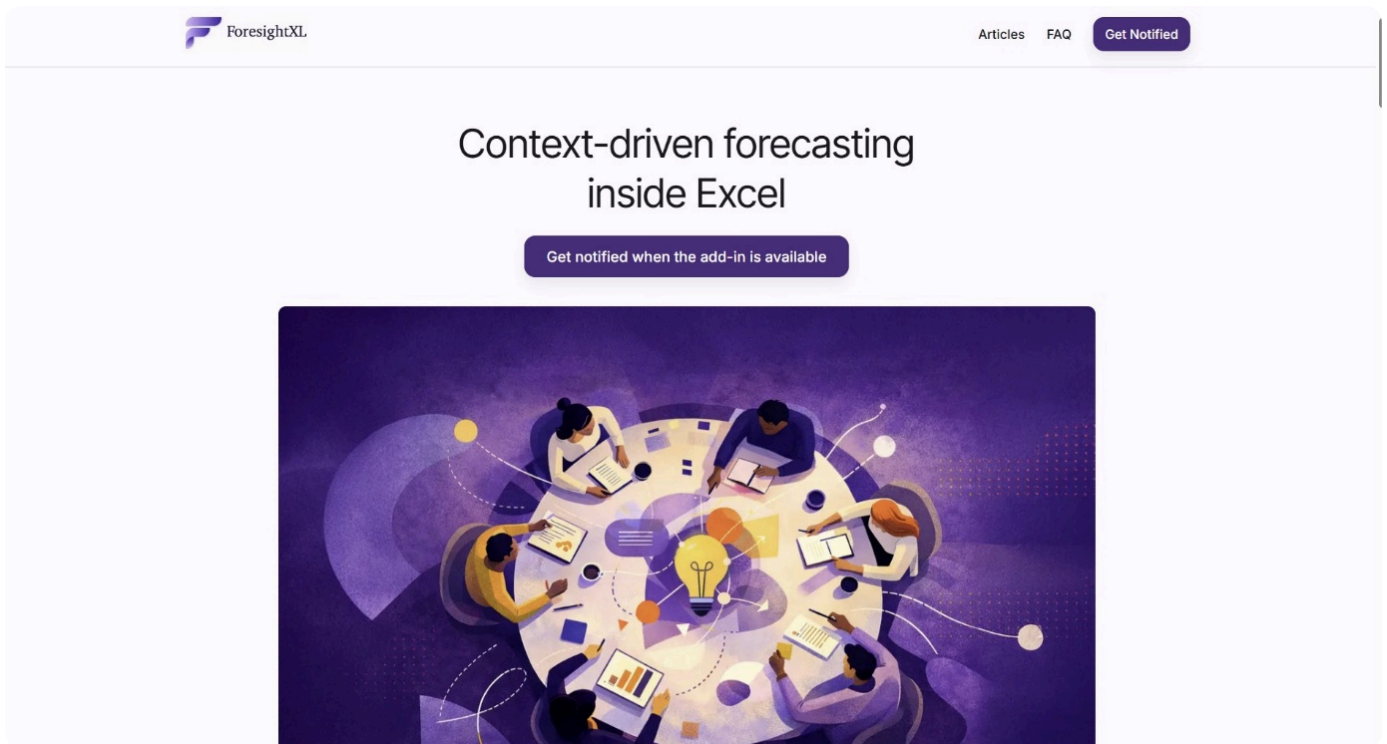
All resources are accessible directly from the ... account menu within the add-in:

**Documentation** - Opens *foresightxl.com* where you can find product articles, FAQs, and a forecasting framework guide.

**Change log** - Links to the latest release notes and feature updates on the ForesightXL website.

**Support** - Opens the support section of the website. You can also reach us at *foresightxl.com/contact-us*.

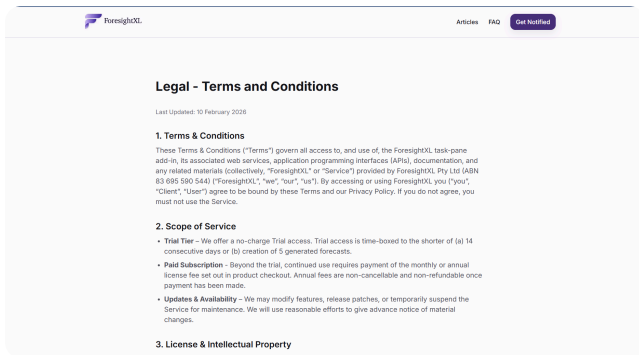
**Terms & Conditions** and **Privacy Policy** - Available via links at the bottom of the login screen and on the ForesightXL website.



ForesightXL's legal documents are accessible via links at the bottom of the login screen and on the website at [foresightxl.com](https://foresightxl.com).

**Terms & Conditions** - Governs your use of the ForesightXL add-in, APIs, and associated services. Key sections cover the free trial, paid subscriptions, data processing, and licence & intellectual property.

**Privacy Policy** - Details what information is collected during sign-in and usage (Microsoft identity, usage metadata), how it is stored, and your rights under applicable privacy law including the Australian Privacy Principles (APPs).



**Legal - Terms and Conditions**

Last Updated: 10 February 2028

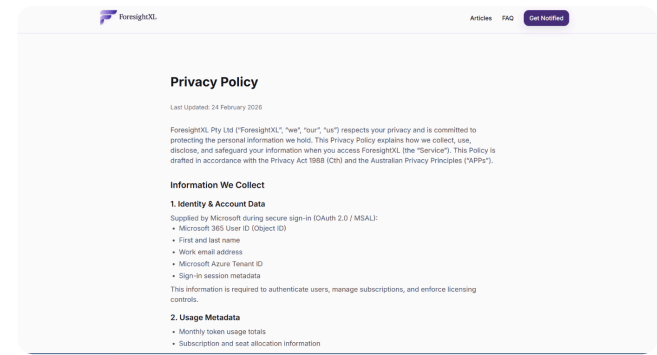
**1. Terms & Conditions**

These Terms & Conditions ("Terms") govern all access to, and use of, the ForesightXL task-pane add-in, its associated web services, application programming interfaces (APIs), documentation, and any related materials (collectively, "ForesightXL" or "Service") provided by ForesightXL Pty Ltd (ABN 83 695 500 544) ("ForesightXL", "we", "our", "us"). By accessing or using ForesightXL, you ("you", "Client", "User") agree to be bound by these Terms and our Privacy Policy. If you do not agree, you must not use the Service.

**2. Scope of Service**

- Trial Tier** - We offer a no-charge Trial access. Trial access is time-boxed to the shorter of (a) 14 consecutive days or (b) creation of 5 generated forecasts.
- Paid Subscriptions** - Beyond the trial, continued use requires payment of the monthly or annual license fee set out in product checkout. Annual fees are non-cancellable and non-refundable once payment has been made.
- Updates & Availability** - We may modify features, release patches, or temporarily suspend the Service for maintenance. We will use reasonable efforts to give advance notice of material changes.

**3. License & Intellectual Property**



**Privacy Policy**

Last Updated: 24 February 2028

ForesightXL, Pty Ltd ("ForesightXL", "we", "our", "us") respects your privacy and is committed to protecting the personal information we hold. This Privacy Policy explains how we collect, use, disclose, and safeguard your information when you access ForesightXL (the "Service"). This Policy is drafted in accordance with the Privacy Act 1988 (Cth) and the Australian Privacy Principles ("APPs").

**Information We Collect**

**1. Identity & Account Data**

Supplied by Microsoft during secure sign-in (OAuth 2.0 / MSAL):

- Microsoft 365 User ID (Object ID)
- First and last name
- Work email address
- Microsoft Azure Tenant ID
- Sign-in session metadata

This information is required to authenticate users, manage subscriptions, and enforce licensing controls.

**2. Usage Metadata**

- Monthly token usage totals
- Subscription and seat allocation information



# You're Ready to Forecast

You've completed the ForesightXL walkthrough.  
Start generating context-driven forecasts directly  
inside Excel - in minutes.



## Website & Documentation

[foresightxl.com/user-guide](https://foresightxl.com/user-guide)



## Support

[foresightxl.com/contact-us](https://foresightxl.com/contact-us)



## Terms & Conditions

[foresightxl.com/legal](https://foresightxl.com/legal)



## Privacy Policy

[foresightxl.com/privacy](https://foresightxl.com/privacy)