PULSE Dashboard & Reporting Software
Fundamentals Training

(Updated June 2023)

Getting Started with the PULSE Dashboard Software

Here are some suggestions to get started:

- Spend 10 minutes/day for a few weeks getting comfortable with Dashboard reports.
- Pinpoint the top 10 reports you want to start using every day.
- Note that you cannot accidentally change someone else's reports.

Obtaining technical support

- You have unlimited phone/e-mail support and training with PULSE Dashboard.
- Contact us are (513)723-8095 or Support@PULSEDashboard.com

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Top ways that PULSE brings you the correct information

The following contains the most popular reports based on customer feedback:

1. Top-level overview of pending and invoiced customer orders
2. Pinpointing production component shortages
3. Customer sales vs. your forecast analysis
4. Inventory status (trends, months on-hand, activity, etc.)
5. Product costing and margin analysis
6. Past due purchase orders and pinpointing orders to be closed

As a new user, where should you focus?

If you can master these five items, you can create or modify almost any report:

- Sorting
- Filtering
- Grouping
- Using the Column Chooser
- Right-mouse button options

Refreshing data

When starting PULSE Dashboard, your reports will need to be refreshed with your Macola data:

- Click on the buttons at the top of the screen called 'Refresh Current Module' OR 'Refresh All Modules.'
- Manually refresh each report – Use the  icon in the report header or double-click on the blue report header bar at the top of each report.
- Manual refreshing each tab – Right-click on the tab name and select 'Refresh Tab' or double-click on the tab header.
- Recommendation – To reduce refresh times and improve performance, turn **OFF** the auto-refresh option for tabs you will use infrequently. Right-click on the tab name and uncheck the 'Refresh with Module' checkbox to make that a manually refreshed tab.

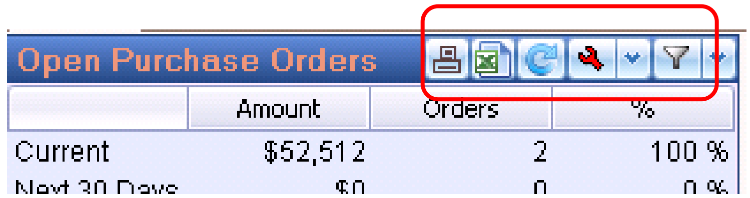
Customizing existing screens

Becoming proficient with the PULSE Dashboard is not tricky. The more time you spend using it, the more comfortable you will become. By mastering these functions, you can quickly change existing reports and create new reports for yourself and others. A full explanation of all of these functions is provided below.

- Use the Column Chooser to change which columns are displayed on the report from a list of available columns.
- Sort your data either ascending or descending.
- Create filters to reduce the amount of data on a report.
- Publish your tabs to share your reports with others.

Report Icons

On each PULSE Dashboard screen, you will see several icons in the upper right corner of the report. These icons will be seen throughout the system. They are used to control the information in this specific report.



 The Print icon allows you to print, export, or email the report.

 The Excel icon will allow you to export the data on the report to Excel precisely as it appears on the report, along with all report and column headers. Further manipulation of the data can occur in Excel.

The Excel icon at the top of the screen near the 'Refresh All Modules' button exports all reports on the current tab.

 The Setup (or Red Wrench) icon allows you to control various report settings, such as dates used as a basis for calculations, number of months to see, accounts to use, and many others.

 The Filter icon allows you to narrow the information retrieved from the database based on one or more columns and their contents. For example, two filters might be created to only view a specific value or range of values for a salesperson and their customers by state. (i.e., Joe Smith and Texas).

Creating a New Tab and Adding New Reports

New report tabs may be easily added by clicking on the "+" icon at the end of the row of existing tabs in each module. The new tab will be empty to allow you to add or copy new reports as needed.

Adding New Reports to the Blank Tab

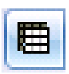
A new report may be added to a new or existing tab in multiple ways:

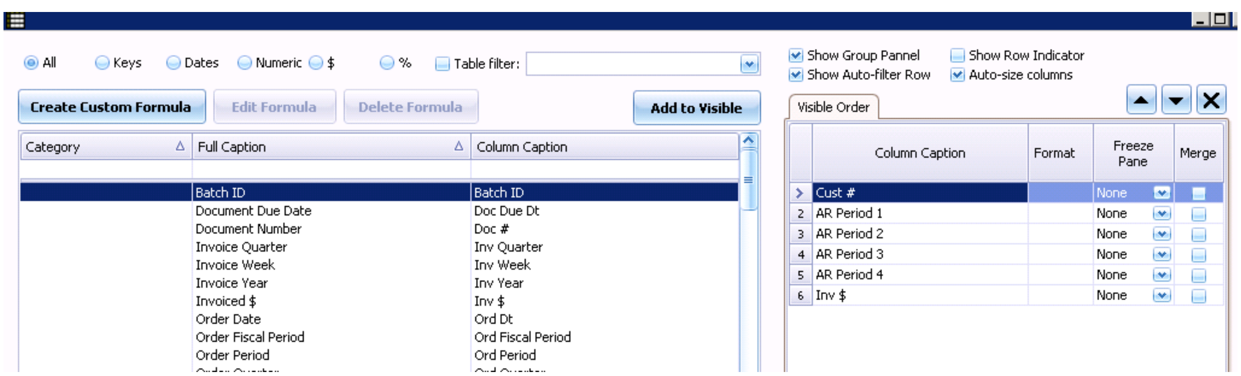
- Use the right mouse button on the tab and select 'Add New Report.'
- Copy an existing report from a tab or module.

You can select the 'Add new report' option to add a standard report using the right mouse button in an area inside the blank tab.

Modifying Reports

In addition to the report icons described earlier, the Column Chooser is also available on most reports or drill-down reports.

 The Column Chooser button allows you to change the columns that appear on your report. Columns selected for the report may be added, deleted, or re-arranged on the report. Custom Formula columns may also be defined and added to the report.



The Column Chooser screen is divided into two main sections.

- **The left side** of the screen lists the data fields available for your report. Add the column to the report by clicking on the 'Add-To' button or double-clicking on the data column name. The filter row is the "blank line" below the Category/Full Caption/Column Caption header line.
- **The right side** of the screen lists the data columns that have been selected for the report. The columns may be sequenced by highlighting the field and using the up/down arrow buttons. Highlighting a data column and selecting the "X" button will remove the data column from the report.

When you are finished making data column selections for the report, select the "OK" button to save the layout and return to the report screen.

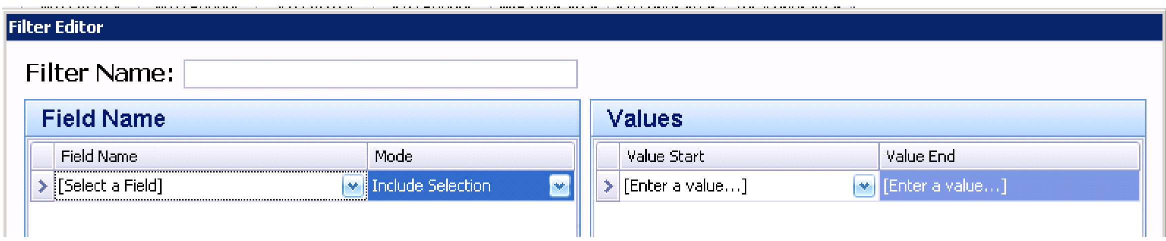
Sorting Data on a Report

Information on your reports can be sorted ascending or descending. This is possible by either double-clicking the column header on the report or right-clicking on the report column header. The sorting may also be cleared if no sort is required.

Filtering the Data on a Report

Reports may have more information than needed. You may decide to focus on details for a single or group of customers, vendors, items, product categories, etc. This is accomplished in the report by adding a filter. There are several methods of applying filters to reports:

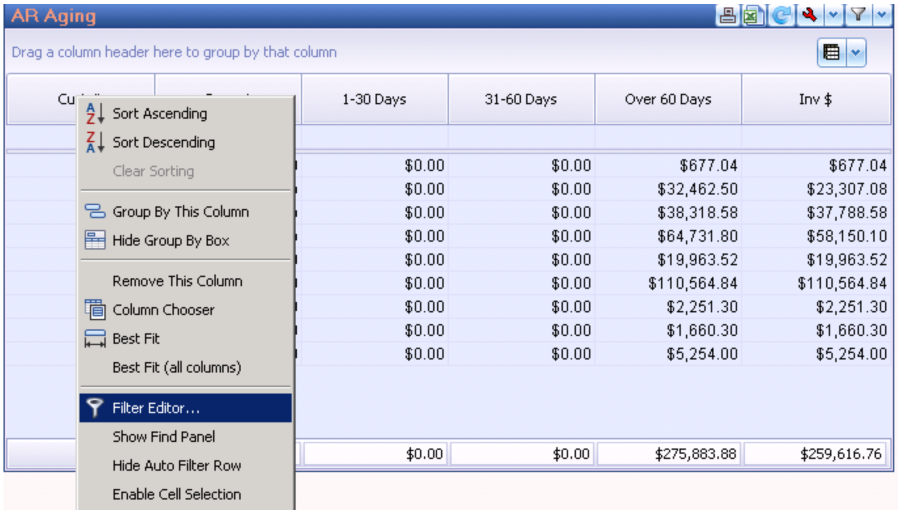
- Use the filter icon  to add a filter based on the information being defined and retrieved at the server (usually more efficient)



- Use the filter row on a report column by typing in the information needed in the "blank" line below the report column name (contains).
- Your filter may be edited using the  button at the bottom right of the report.
- The filter may be temporarily turned off by unselecting the filter at the lower-left checkbox.
- The filter may be permanently removed by clicking on the red  icon at the lower left of the report.

Cust #	Current	1-30 Days	31-60 Days	Over 60 Days	Inv $
901	($9,155.42)	$0.00	$0.00	$32,462.50	$23,307.08
902	($530.00)	$0.00	$0.00	$38,318.58	$37,788.58
903	($6,581.70)	$0.00	$0.00	$64,731.80	$58,150.10
904	$0.00	$0.00	$0.00	$19,963.52	$19,963.52
905	$0.00	$0.00	$0.00	$110,564.84	$110,564.84
906	$0.00	$0.00	$0.00	$2,251.30	$2,251.30
907	$0.00	$0.00	$0.00	$1,660.30	$1,660.30
908	$0.00	$0.00	$0.00	$5,254.00	$5,254.00
	($16,267.12)	$0.00	$0.00	$275,206.84	$258,939.72

- Right-click on the report column and select Filter Editor to create a more complex filter.

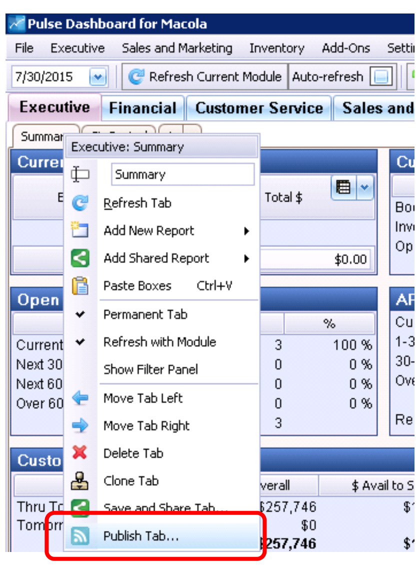


- The filter allows you to add additional columns to filter on or change the original column, then change the operator (and, or, <, >, between, etc.) and enter the value(s) on which to filter.

Publishing Tabs (Note that this feature may be turned off for some users.)

Publishing a tab is an option by right-clicking on a tab header. It is used to share your reports with other users.

The publishing feature is performed at the Tab level. It allows you to send an entire tab of reports to another user's dashboard. After it has been published, the recipient will see the new tab of reports when they next start their PULSE Dashboard.



Tips and Frequently Asked Questions

- Recommendation – Turn **OFF** the auto-refresh option for all tabs not used daily to reduce refresh times. Right-click on the tab name and uncheck the 'Refresh with Module' checkbox to make that a manually refreshed tab. This will improve overall performance when refreshing.
- Remember, the right mouse button is a handy tool. By using it on Tabs, the blue report header bar, the report column header, and many other places, a different menu of selections become available to provide tools used to customize your PULSE Dashboard.
- When developing new reports, create a new tab and copy any report(s) you want to change to the new tab. That way, you have a test area that will not change the original report. If your new report is not working correctly, your original copy will remain available.

Please call our PULSE support desk with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

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