

Leahy Consulting

PULSE 5 Webinar WEEK 3 Format – Accounting & Finance

June 23, 2011

1. Executive

- a. AP Aging
 - Received not Invoiced (Receiving Accrual)
- b. AR Aging
- c. Budgets
- d. Current Balances
- e. GL Control

2. Finance

- a. Financial Control

3. Sales Marketing

- a. Budgets
- b. Target Margins

4. Security

- a. User Control
 - PULSE module (box by box) by user
 - GL account security by user
 - Salesperson security by user
 - PULSE users do not need to be Macola users
 - User groups
 - New users / domain linkage
 - Manual entry new user / domain linkage
 - Admin option by user
 - No PULSE administrator password needed for any administrative function
 - Review user security by logging in as different users
 - Administrator may update PULSE version and license on demand without interruption to other PULSE users
 - Individual user settings saved at database level



5. Save & Share Repository

- a. Template repository concept
 - Tabs – boxes and filters attached
 - Boxes – settings, filters and grid layouts attached
 - Filters –for a tab or a box
 - Filing options
 - Folder naming conventions
 - New, overwrite existing and deleting existing
 - Sharing options
 - Just me
 - Everyone (Edit - allows overwrite/delete)

6. Help

- a. Help & Info
 - Live Help On-Line
 - Error messages received by PULSE 5 users sent to support automatically
 - e-mail address support@pulsedashboard.com
 - Web address <http://www.pulsedashboard.com/>

