PRESENTED BY:

AccountingWare

WELCOME TO

# Dashboard and Analytics

Marvin Crossnoe

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# SESSION INFO

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## RESOURCES

The slides and a recording will be sent via email.

## QUESTIONS

Use the “Questions” panel to chat with the presenters and AccountingWare team.

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## ABOUT THE PRESENTER

**Marvin Crossnoe**

# Dashboards and Analytics

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# Agenda

## Dashboards

- Classic
- New
- Version 2.0

## Analytics

- Graphical Presentation of Financial Data

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# Goals of Today's Presentation

1) Understand the Basic Structure of a Dashboard
2) Discover things to populate a Dashboard
3) Introduce a new look for Dashboards – Version 2.0
4) Introduce Graphical Presentation using Dashboards (Analytics)

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Dashboard

- Gadgets
  - Macros

Dashboard is One or More Gadgets

- Gadgets are comprised of One or More Macros
  - Macros are tools to Interface to ActivityHD

# DASHBOARD

**click here to access Dashboard**

ActivityHD Explorer - Dashboard for MRCCompany - Marvin

Disconnect

ACTiVITYHD

- Activity System (cnx00-
- CoNetrix
- Demo Casa Blanca JPJ
- Demo CNX
- DemoMRC-JF
- DemoMRC-JF1
- MRCCompany
  - Administration
  - General Ledger
  - Bank Reconciliation
  - Accounts Payable
  - Accounts Receivable
  - CRM
  - Fixed Assets
  - Payroll / Human Resource
  - Purchasing

backstage: print cop → close

MRCCo

Marvin Crossnoe
Thursday, August 22, 2024 9:37:00 AM

**Action Lists**

- AP Manager Audit
- AP Manager Information and Links
- AP Manager Maintenance
- AP Manager Reports
- AP Manager Workflow
- AP Payments Workflow
- AP User Dashboard
- AP User Dashboard with Counts
- AP User Dashboard with Counts and Dollars
- Action Macros
- Count Macros
- Financial Chart:EOY Quick Ratio
- Financial Chart:Electrical Expense
- Payments Workflow
- Process Payroll
- Report Macros
- Report Macros 1
- Report Macros 2
- Report Macros 3
- Report Macros 4
- Reports
- Review
- Vendor and Invoice Workflow
- Visual Financial Explorer
- W-9 Audit

**External Links**

- AccountingWare

## AP User Dashboard

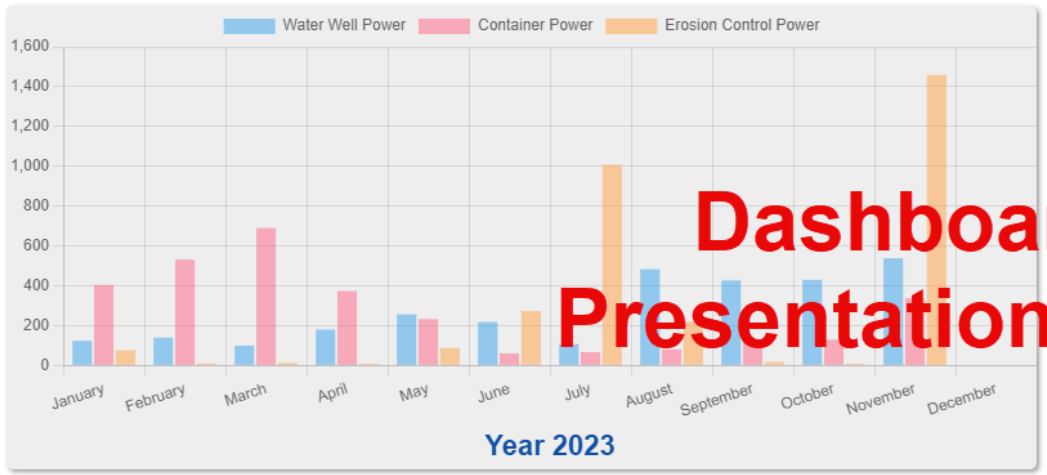
close close others edit

Vendors by Creation Date
Filing Status of Individual or Partnership
Vendors with no Invoices for prior 2 Years

## Electrical Expense

Financial Chart

close close others edit




**Dashboard Presentation Area**

## Vendor and Invoice Workflow

close close others edit

### Vendors

- Create New Vendor
- Vendor Table (132)
- Missing Contacts (44)
- Missing W-9 Form (13)

### Invoices

- Enter New Invoice
- Review New Invoices (3) - $385.38
  Proof And Merge
- Aged Invoice Analysis

# DASHBOARD ORGANIZATION

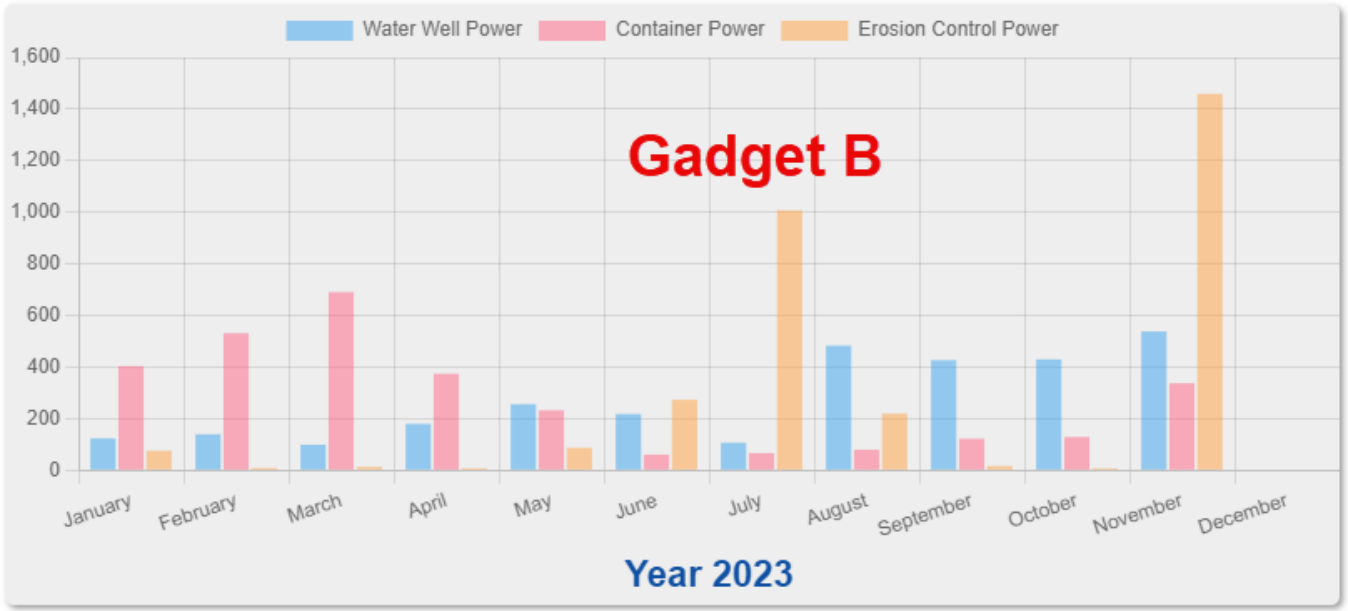
## AP User Dashboard

Vendors by Creation Date
Filing Status of Individual or Partnership
Vendors with no Invoices for prior 2 Years

**Gadget A**

## Electrical Expense

Financial Chart




## Vendor and Invoice Workflow

### Vendors

- Create New Vendor
- Vendor Table (132)
- Missing Contacts (44)
- Missing W-9 Form (13)

**Gadget C**

### Invoices

- Enter New Invoice

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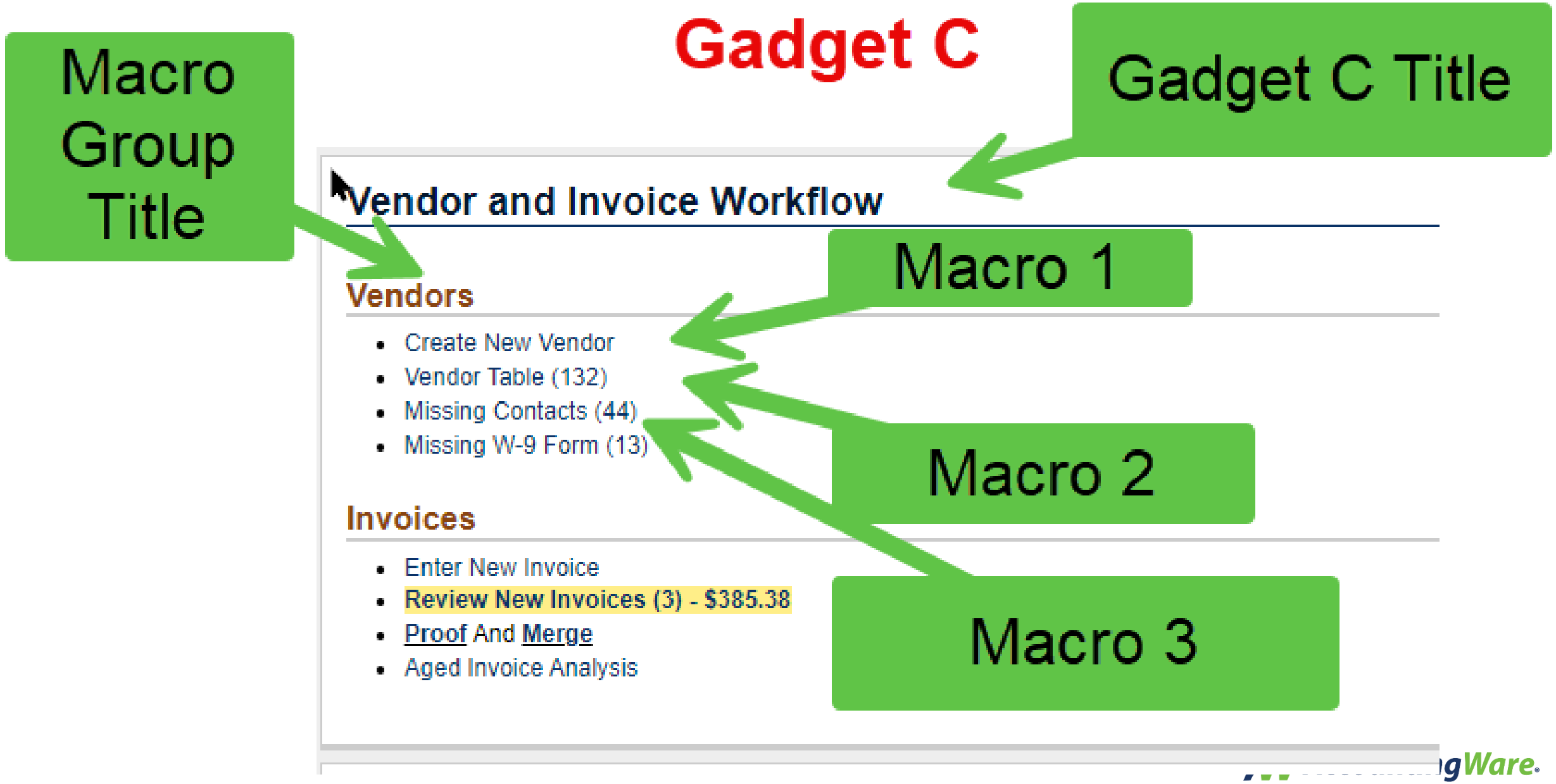
Macro Group Title
Gadget C
Gadget C Title
Vendor and Invoice Workflow
Macro 1
Vendors
Create New Vendor
Vendor Table (132)
Missing Contacts (44)
Missing W-9 Form (13)
Macro 2
Invoices
Enter New Invoice
Review New Invoices (3) - $385.38
Proof And Merge
Aged Invoice Analysis
Macro 3

Macros are the Interface mechanism to ActivityHD

To Understand the possibilities inherent in the Dashboard, we must understand the various Macro types

# Report

- Run ActivityHD reports

# Action

- Get a collection of ActivityHD data
- Do something (take an action)
  1. Merge
  2. Pay
  3. Display

# Count

- Adds record count and total of numeric column
- Counts and totals are “active”

# Conclusion

# SUBMIT YOUR QUESTIONS!

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# Next Session

## Learning to Streamline Your Payroll Processes

Thursday, August 22
12:30PM (CT)

Elizabeth Hudspeth & Chris Oden

## ALL SESSIONS

- Bruce and Grant's Excellent Unboxing Adventure
- Cybersecurity Essentials for Today's Internet Connected World
- Do More With Less: Publishing Financial Designs
- Back to Basics
- General Ledger: Controller Workshop
- The Right Tool for the Job: Automation
- Enhancing Purchasing: Boosting Visibility, Efficiency, and Commitments
- Attributes: Multi-Dimensional Accounting
- New Graphics Capabilities in ActivityHD
- Learning to Streamline Your Payroll Processes
- Mastering Contract Processing: Streamline, Optimize, Manage
- Payroll Problem-Solving: Become a Master of Troubleshooting

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*Remember to complete the survey!*

THANKS FOR JOINING

# Dashboard and Analytics

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