Dashboard

WHAT IT DOES FOR YOU

The **AccuFund Dashboard** provides users with graphical views of the current status of their financial data in the ***AccuFund Accounting Suite***. Users can view data in either graph or grid mode and display multiple graphs simultaneously. Most modules are available to the **Dashboard**, allowing users to focus on the areas of the financial system that are most important to them. For example, if a user wants to see cash balances and the top five accounts receivable customers, they can choose to have that information displayed in the Dashboard by defining datasets and then inserting them into the desired graphical presentation. The dashboard can be refreshed as frequently as desired so the data is always current.

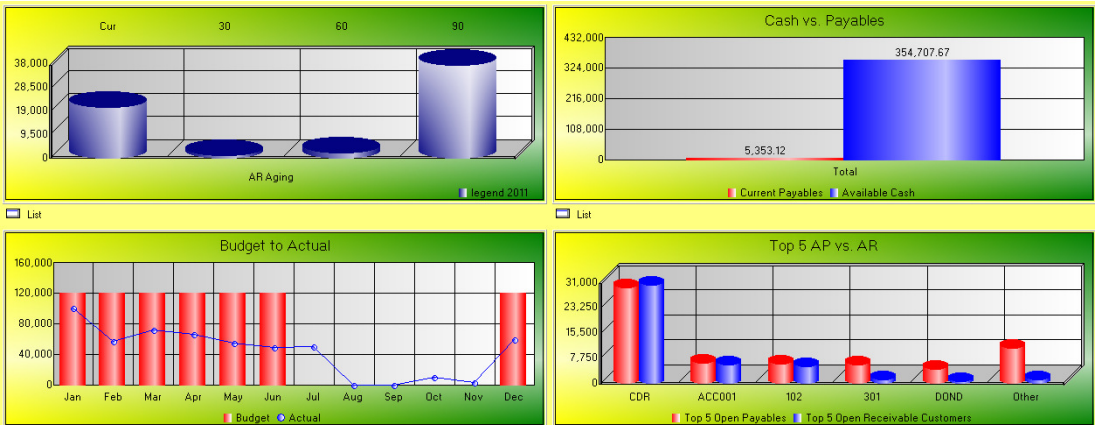
HOW IT WORKS

Each user's **Dashboard** can be configured according to their unique needs and is based on simple, flexible building blocks. With a three-step process, users can generate highly usable dashboards. First, the user defines a dataset to be displayed and the type of graphical presentation desired. The dataset specifies the module from which to pull the data, the grouping of the data by period, cost center or organization and selects the period to display. As part of the dataset the user selects the type of graphic display such as bar, pie, line or scatter. Next, the user inserts one or more datasets into a graph, showing combined sets of similar information. For instance a graph might include a budget to actual comparison. Each would be a dataset and would be combined into a graph. Finally, a user's "view" or actual dashboard is defined in which the graph becomes available to the user.

OTHER FEATURES

The **Dashboard** uses a set of tabs to prompt users as they define the datasets and walk them through the steps of defining the graphs, in which one or more datasets can be inserted.

To define a dataset, the tabs prompt the user to decide which component (module) to use, which information should be displayed, how the data should be grouped, what time periods should be viewed, and how the data should be displayed, choosing from five different chart options. The final tab allows the user to see what the final data chart will look like.



Each user can have the information most important to them displayed on their desktop.

The options available with each tab/prompt are specific to the module and type of information required to define the dataset. For example, the data grouping options may include:

- Aging (not financial)
- Monthly for the year
- Monthly for 12 months
- Quarterly for the year
- Quarterly for 12 months
- Total (of all groups)
- Type (not financial)
- Organization (not financial or fixed assets)

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· Classification (financial only)
· Cost Center (financial only - elements based)

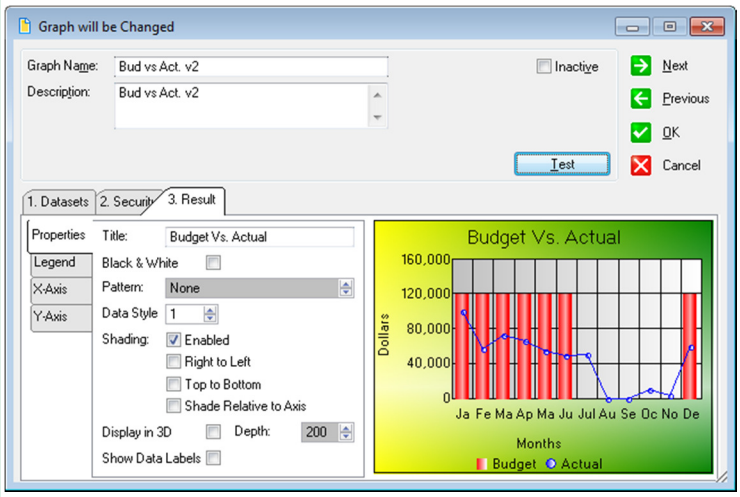
When defining the graph, the tabs prompt the user to select the datasets to include, descriptors for the graph (e.g. Y axis descriptor, X axis descriptor), shading, and user access (Professional edition). The result tab shows the designer what the end result will look like on the dashboard.

The final step is the user View. The View is a specific user's actual dashboard. It includes the configuration of graphs, i.e. 2 x 2 or 2 x 4, the specific graphs for this user and the order in which to present them. The final result is a dashboard that is customized for the user, and automatically populated with the graphs according to the setup configured in the dashboard's views function.

All AccuFund Accounting Suite users can have a dashboard, including AccuFund Access users, which permits users and departments outside of accounting to limited access to the accounting system.

Graphs can be copied from the **Dashboard** into other documents for presentation purposes or printed directly.

When units of service are stored these can be compared to financial data, so that service versus revenue and/or cost can be compared.

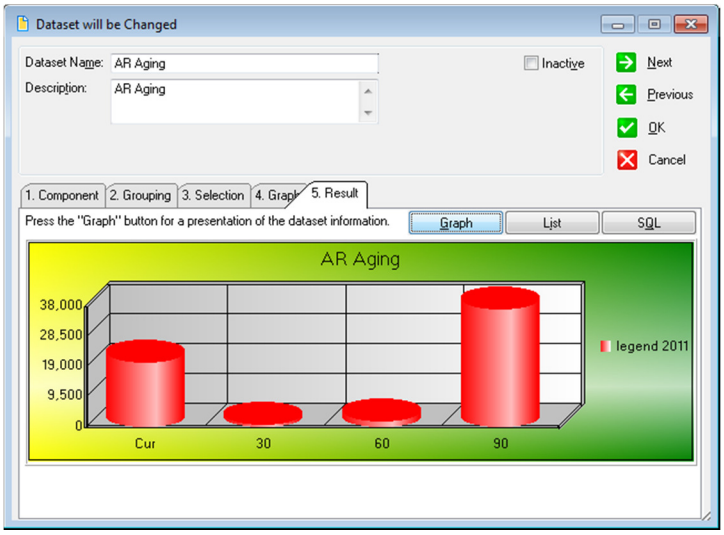


The Graph Screen lets you select the data sets to include and add titles and legends to the dashboard presentation.

COMPONENT INTEGRATION

Dashboard is integrated with:

- ✓ **General Ledger** for financial graphing
- ✓ Accounts Receivable
- ✓ Accounts Payable
- ✓ Cash Receipts
- ✓ Client Accounting
- ✓ Fees, Taxes and Licenses
- ✓ Purchasing
- ✓ Requisitions
- ✓ Fixed Assets
- ✓ Loan Tracking
- ✓ Utility Billing



The dataset defines the component to be reported, the grouping of the data and the selection of which data.

COMPONENT AVAILABILITY

DashBoard is available with both the Standard and Professional editions of the ***AccuFund Accounting Suite***.

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