

Dashboards

Document #: 3399 Product: CenterPoint[®]

The Dashboard allows you to view performance and financial information upon CenterPoint start up or with the Reporting Tools > Dashboard menu. The Dashboard provides a quick overview of your business and allows you to access the report that generated the information. The default Dashboard can be customized for your specific needs.

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Set the Dashboard Preference (One-time Setup)

- 1. Select File > Preferences > General > Dashboard.
- 2. Select the **Application** tab.
- 3. If you want to display the Dashboard when CenterPoint is opened, in the **Display on Startup** box, select **Yes**.
- 4. If you want your Dashboard information saved to a location other than the default

"<Documents>\CenterPoint\Dashboard\", in the Location of saved dashboard tiles box, select an alternate location.

5. Click Save.

View the Default Dashboard

1. If you have not set the Dashboard to display each time CenterPoint is opened, select **Reporting Tools > Dashboard**.

🕐 Dashboard		- 🗆 X
Cash	Accounts Receivable	Accounts Payable
\$268,659	\$118,529	\$45,838
	Total	Total
Net Income (Accrual Method)	Current Ratio	Net Income (Cash Method)
\$515,310	10.43	\$522,697
Year-To-Date	Accrual Method	Year-To-Date
Debt to Asset Ratio		
0.13		
Accrual Method		
		Open with database

If you did not set the Dashboard to display upon CenterPoint start up, you can choose to open the Dashboard with this database and set the Display on Startup in File > Preferences > General > Dashboard by selecting the Open with Database check box.

Create a New Dashboard Tile

Example 1: Add Dashboard Tile using Report Selection Filters

1. On the Dashboard screen, right-click and select Add/Remove Tiles.

Add/Remove Tiles to Dashboard	_		×
Tile	Source		^
🗹 Cash Flow Detail	Custom		
Customer Deposits	Custom		
Payments Journal (Summary)	Custom		
Account Receivable (From Accounts Receivable Aging)	System		
Accounts Receivable Aging (Over 30 Days)	System		
Accounts Receivable Aging (Over 60 Days)	System		
Accounts Receivable Aging (Over 90 Days)	System		
Balance Sheet (Current Liabilities)	System		
🗹 Cash (From Bank Register)	System		
Eamings (Total Overtime Paid)	System		
Earnings (Total Wages Paid)	System		
Employee Average Hours Worked Per Week (Avg Hours)	System		
Employee Average Hours Worked Per Week (Total Hours)	System		~
New 🔽	ж	Cancel	Î

- 2. Click the drop-down arrow on the New button and then select **Report Tile**.
- 3. The Reports screen will open behind the Dashboard. Select the report you want to add a Dashboard tile from. For example, from the Reports screen, select Transaction Reports > General Ledger > General Ledger Activity.
- 4. Define your Report Selection Filters and then click **Preview**. The report selections will be used to filter the dashboard tile you create. For example, if you filter the date to This Month, the tile will always display data for the current month or in this example, the report should be filtered to include only Account 700000 Utilities Expense.



5. From the Preview toolbar, click the **Add to Dashboard** icon to display the Add Dashboard Tile screen.

Name	General Ledger Account Activity		
Top Label	Top Label	Left	~
Bottom Label	Bottom Label	Right	>
Display		 ✓ Format 	Value
	Additional Filters		
	Top Label		
	Bottom Label		

- 6. The **Name** box will display the report you selected in step 3. You can change this name to be more specific if you have more than one tile generated from this report.
- 7. In the **Top Label** box, enter the text you want to display in the upper portion of the Dashboard tile. For example, Utilities Expense. Then, select if you want the text to display from the left, in the center, or from the right side of the tile.
- 8. In the **Bottom Label** box, enter the text you want to display in the lower right corner of the Dashboard tile. For example, From Account 700000. Then, select if you want the text to display from the **Left**, in the **Center**, or from the **Right** side of the Dashboard tile.
- 9. In the **Display** box, specific information about the data the report displays will need to be defined so the Dashboard tile can display the information you want to view. For example, for the General Ledger Activity report the selections are Debits or Credits. In this example, the information viewed will be what has been spent in an Expense account, so Debits were selected.
- 10. Click the **Format Value** button to display the Set Number Format screen.

Q Set Number Form	nat	<u>_</u> 3		×
Decimal Places Use currency symbol	2 🔹			
Negative Numbers	(99.99)		~	
Example:				
(\$	999,999.12	2)		
	ОК		Cancel	

11. In the **Decimal Places** box, select the number of decimal places you want to view, select the **Use currency symbol** check box to add a \$ sign to totals, determine if **Negative Numbers** should display with a negative sign or in parenthesis, and then click **OK**.

4/10/2019	000682	Expense	All Area Telephone	
4/10/2019	000694	Expense	Advanced Connect	
4/23/2019	000700	Expense	Small Energy Corp Ga	IS
4/23/2019	000702	Expense	CenterPoint Water & S	Sewer
4/23/2019	000704	Ex 🔎 Add Dashboard Tile		– 🗆 X
4/25/2019 4/25/2019	000706 000708	Ex Ex	Ledger Account Activity	
5/16/2019 5/16/2019	000717 000727	Ex Bottom Label From Acc Ex Display Debta	count 700000	Right ~
5/16/2019 5/17/2019	000728	Ex Addition	onal Fiters	
5/22/2019 5/22/2019 5/22/2019	000737 000741	Ex Utiliti Ex	\$8,882.52	
6/4/2019 6/26/2019	000746 000756	Ex	From Account 700000	
6/26/2019 6/26/2019	000757 000760	Expense	Sinail Energy Corp Ga	e Cancel 🕜
6/26/2019	000762	Expense	CenterPoint Water & S	Sewer
6/26/2019	000763	Expense	Advanced Connect	
			700000 Utilities Expe	ense Totals

12. Click Save. The new Dashboard tile will now appear on the Dashboard screen.

Example 2: Add Dashboard Tile using Additional Filters

1. On the Dashboard screen, right-click and select Add/Remove Tiles.

Add/Remove Tiles to Dashboard	- 0	×
Tile	Source	^
☑ Cash Flow Detail	Custom	
Customer Deposits	Custom	
Payments Journal (Summary)	Custom	
Account Receivable (From Accounts Receivable Aging)	System	
Accounts Receivable Aging (Over 30 Days)	System	
Accounts Receivable Aging (Over 60 Days)	System	
Accounts Receivable Aging (Over 90 Days)	System	
🗹 Balance Sheet (Current Liabilities)	System	
🗹 Cash (From Bank Register)	System	
Earnings (Total Overtime Paid)	System	
Earnings (Total Wages Paid)	System	
Employee Average Hours Worked Per Week (Avg Hours)) System	
Employee Average Hours Worked Per Week (Total Hours	s) System	~

- 2. Click the drop-down arrow on the New button and then select **Report Tile**.
- 3. The Reports screen will open behind the Dashboard. Select the report you want to add a Dashboard tile from. For example, from the Reports screen, select Financial Statements > Income Statement.
- 4. Define your Report Selection Filters and then click **Preview**. The report selections will be used to filter the dashboard tile you create. For example, if you filter the date to This Month, the tile will always display data for the current month.
- 5. From the Preview toolbar, click the **Add to Dashboard** icon to display the Add Dashboard Tile screen.

Name	Income Statement			
Top Label	Revenue		Left	`
Bottom Label	Total This Month	Right	`	
Display	Oct 2019 Oct 2019 Actual	~	Format	Value
	Additional Filters			
	Revenue			
	\$643,617.90			
	Total This Month			

- 6. The **Name** box will display the report you selected in step 3. You can change this name to be more specific if you have more than one tile generated from this report.
- 7. In the **Top Label** box, enter the text you want to display in the upper portion of the Dashboard tile. For example, Revenue. Then, select if you want the text to display from the left, in the center, or from the right side of the tile.
- 8. In the **Bottom Label** box, enter the text you want to display in the lower right corner of the Dashboard tile. For example, Total This Month. Then, select if you want the text to display from the **Left**, in the **Center**, or from the **Right** side of the Dashboard tile.
- 9. In the **Display** box, specific information about the data the report displays will need to be defined so the Dashboard tile can display the information you want to view. For example, for the Income Statement report the selection period was selected to display This Month. In this example, the information viewed will be for October 2019 Actual.
- 10. Click the **Format Value** button to display the Set Number Format screen.

Set Number Form	nat	84 <u>—</u> 88		\times
Decimal Places Use currency symbol	2 🔹			
Negative Numbers	(99.99)		~	
Example:				
(9	999,999.1	2)		
	OK		Cancel	

- 11. In the **Decimal Places** box, select the number of decimal places you want to view, select the **Use currency symbol** check box to add a \$ sign to totals, determine if **Negative Numbers** should display with a negative sign or in parenthesis, and then click **OK**.
- 12. Click **Additional Filters** to select the specifics that you want to appear on the Report Tile. In this example, the total of the Revenue subset of accounts should be displayed.

Additional Filt	ers							
Report Data								
(Group) Type Name	(Group) Category	Account	Oct 2019 Oct 2019 Actual					
Revenue	Resale of Other Purchased Items	Sale of Bushel Basket	1698.00					
evenue	Resale of Other Purchased Items	Sale of Honey	148.00	-				
evenue	Sales of Baised Crops	Sales of Sovbeans	134559.20	-				
evenue	Change in Baised Crop Inventory	Change in Raised Apples	-185568 30	-				
avanua	Change in Raised Crop Inventory	Change in Raised Cop Invent	339900.00	-				
evenue	Change in Naised Crop Inventory	Criange in Haised Crop invenit.	43543.00	-				
avanua	Spice of Lither Raised Iteme	Salae of Lontiand Anniae	143547101					
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Remove	Clear					C	K	
Remove	Clear d 1 II II 2 2 Heren 会界会得合·Page	width - Find Not Core				С	К	
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13. Click Save. The new Dashboard tile will now appear on the Dashboard screen.

Example 3: Add a Dashboard Tile as a Chart from a Report

1. Select Reports > Reports, select a report that you want to view as a chart on the Dashboard. Define your report selection filters, and then click **Preview**.

2. Click the Add to Dashboard as Chart icon 💭. The Add Dashboard Tile screen displays.

Add Da	hboard Tile	-	U	×
Name	General Ledger			
X Axis				~
Y Axis	Debits Credits			
Series	<none></none>			~
up Dates	None			~
General L	edger Comparison			Chart
				Table
Reverse	X-Axis Qave		ancel	

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This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant.

- 3. The **Name** box will display the report you selected in step 3. You can change this name to be more specific if you have more than one tile generated from this report.
- 4. Select the information you want to display on the **X Axis** of the chart (horizontal rows axis). The information varies by report, for example the General Ledger report X Axis options are Group (Account Number), Group (Account), Group Row Type Name, Transaction Date, Transaction Number, or Name/ Description.
- 5. Select the information you want to display on the **Y Axis** of the chart (vertical column axis). The information varies by report, for example the General Ledger report Y Axis options are Debits and/or Credits.
- 6. The Series box assigns titles for the row and column grouping combinations. When a selection is made in the Series box, one color and series title is assigned to each row group (x axis) and column (y axis) combination. For rows, the Series box is limited to text/integer columns for grouping the rows. It is recommended to only include CenterPoint reports with Product Year (Tracking Number 1), Production Series or other Year columns in a Series title for all other reports, select None. Charts always display a column label in the series titles for columns. Colors are always assigned to each row grouping on the x-axis. However, when None is selected, the series titles are only the column (y-axis titles).
- 7. In the **Group Date** box, select from Month, Quarter, Year or None.
- 8. Click Additional Filters to select the specifics that you want to appear on the Report Tile.
- 9. Select a **Graph Type**, the options are:

Line 🗸
Line
Line (3D)
Step Line
Step Line (3D)
Spline
Spline (3D)
Point
Bar
Bar (3D)
Stacked Bar
Stacked Bar (3D)
Full Stacked Bar
Full Stacked Bar (3D)
Pia
Doughput
Doughnut (3D)
Area
Area (3D)
Stacked Area
Stacked Area (3D)
Full Stacked Area
Full Stacked Area (3D)
Spline Area
Spline Area (3D)
Stacked Spline Area
Stacked Spline Area(3D)
Full Stacked Spline Area
Full Stacked Spline Area (3D)

- 10. Select the **Reverse X Axis** checkbox to reverse the order of the X-Axis.
- 11. Click Save.
- 12. The Dashboard Tile will be added to the Dashboard, for example:



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6. To Expand the Chart/Table, click 2 . In the examples below, the Add Dashboard Tile screen was defined from the General Ledger report, X Axis set to (Group) Account, Y Axis set to both Debits and Credits, Series set to None, Group Dates set to



Month, and Graph Type set to Bar. To collapse the Chart/Table , click

Example 4: Add a Dashboard Tile from a Ratio

- 1. Select **Reports > Reporting Tools > Ratios**.
- 2. On the left side of the screen, select the top-level of the tree, sub-level, or account cateogory of the tree (not the individual ratios), in the example below the top level is Debt to Asset, the sub-levels are Liabilities and Assets, and the account category level is Accounts Receivable..

ess ~						0	Debt to	o Asse	t				
Current Ratio	0.55												
- @a Current Liabilities Top I	evel												
Debt to Asset	0.50												
⊇-92g Liabilities													
Long Term Debt	0.45												
Other Current Liabilities	level	c											
Accounts Pavable	0.40												
-Qa Assets	0,10												
Other Assets	0.25												
D Investments	0.35												
🕅 Accumulated Depreciation	0.00												
Land	0.50 -												
Buildings & Improvements	_												
Furniture, Fixtures & Equiph	0.25	ount	atogon										
- D Inventory	1 ~~	Joune	Jategory										
Accounts Receivable	0.20												
Cash													
Debt to Equity	0.15												
Equity to Asset													
Gross Profit Margin	0.10												
Inventory Tumover													
Culck Ratio	0.05												
Return on Assets													
Return on Equity	0.00												
Working Capital			Feb 19		Jun 19		Oct 19		Feb 20		Jun 20		Oct 20
		Dec 18		Apr 19		Aug 19		Dec 19		Apr 20		Aug 20	
							Formula/E	Description					

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D 1 ... A

- 3. Click the Add to Dashboard icon
- 4. At the Tile Saved message, click **OK**.
- 5. The tile will be saved to the Dashboard, for example:

		Debt to Asse	t				
				Chart Table			
6. To Expand the Chart/Table	tabs, click 🖾.						
(🕐 Dashboard				-		×
	Debt to Asset						
	0.50	Deb	ot to Asset				Chart Table
	0.20 0.10 0.00 Feb 19 Dec 18 Apr 1	Jun 19 O 9 Aug 19	ct 19 Feb 20 Dec 19 A	Jun 20 pr 20	Oc Aug 20	t 20	
	Dashboard				Open	with database	; ☑ ×
	Debt to Asset	Jan 19 Feb 19 0 0.516551880183 0.51733183744	Mar 19 Apr 19 0.518586895973 0.518442542080.	May 19 . 0.518277406361	Jun 19 Ju 0.517002478272 0.	⊿l 19 .515526213850 >	Chart Table
						Open with databa	ase 🗹

6. To collapse the Chart/Table. click

Add a Dashboard Tile Similar to Another

- 1. On the Dashboard screen, right-click on the Dashboard tile you want to use to define another Dashboard tile, and then select **Copy**.
- 2. Edit the existing information and Save the new Dashboard tile.

Edit a Dashboard Tile

- 1. On the Dashboard screen, right-click on the Dashboard tile you want to change, and then select Edit.
- 2. On the Edit Dashboard Tile screen, change the necessary information.
- 3. Click Save.

Change which Dashboard Tiles Display

1. On the Dashboard screen, right-click in a blank space, and then select Add/Remove Tiles.

Add/Remove Tiles to Dashboard		×
Tile	Source	^
✓ Cash Flow Detail	Custom	
Customer Deposits	Custom	
Payments Journal (Summary)	Custom	
Account Receivable (From Accounts Receivable Aging)	System	
Accounts Receivable Aging (Over 30 Days)	System	
Accounts Receivable Aging (Over 60 Days)	System	
Accounts Receivable Aging (Over 90 Days)	System	
Balance Sheet (Current Liabilities)	System	
🛛 Cash (From Bank Register)	System	
Earnings (Total Overtime Paid)	System	
Earnings (Total Wages Paid)	System	
Employee Average Hours Worked Per Week (Avg Hours)	System	
Employee Average Hours Worked Per Week (Total Hours)	System	~

- 2. Select the Dashboard tiles you want to display on the Dashboard screen or unselect the Dashboard tiles you no longer wish to display on the Dashboard screen.
- 3. Click OK.

Display Report Properties for a Dashboard Tile

1. On the Dashboard screen, right-click on the Dashboard tile you want to display information for, and then select **Properties**.

Properties				×	
Name	General Ledger Account Activity				
Туре	Report Tile				
Creation Date File Name	10/04/2019 C:\Users\connies\Documents\CenterPoint\Dashboard\General Ledger Account Activity.cptile				
			0	К	

2. Click OK.

Display the Associated Report for a Dashboard Tile

>> On the Dashboard screen, right-click on the Dashboard tile you want to display the associated report for, and then select **Open Report**.

OR

³⁰ On the Dashboard screen, double-click on the Dashboard tile you want to display the associated report for.

Remove or Delete a Dashboard Tile

- >> To remove a dashboard tile from the Dashboard screen, on the Dashboard screen, right-click on the Dashboard tile you want to remove, and then select **Remove**.
- To delete a custom dashboard tile(s) from the Dashboard screen and from the Add/Remove Tiles to Dashboard screen, on the Dashboard screen, right-click, and then select Add/Remove Tiles. On the Add/Remove Tiles to Dashboard screen, select the tile(s) to delete, and then click Delete.

Ø

Note: Only custom dashboards tiles can be deleted. A confirmation message will display informing you about how many tiles will be deleted. If the number is less than the number you have selected, there are some system supplied dashboard tiles selected.

Refresh Dashboard Tile Information

Dashboard information auto-refreshes on a regular basis. If you enter transactions into CenterPoint and the auto-refresh does not occur immediately, right-click on the applicable Dashboard tile, and then select **Refresh**.