

TRENT BELL & MASON EDWARDS

Illuminating your Data With Dashboard 2.0





Trent Bell

Application Developer



Mason Edwards

Implementation Specialist

1

Dashboards Today

2

How to visualize your data in Dashboard 2.0

3

Gain key insights into your company's data

4

Learn to create your own dashboard layouts

5

What are some key takeaways?

Dashboards Today

AATest



> Action Lists

> External Links

Process AP

Maintenance

Enter Invoices

Payments

Activity

Reporting

Add New:

Vendor Details

- Vendor
- Class
- Contact
- Location
- Note

AP Setup

- APCode
- Terms
- Distribution Template

Process Leave Plans

- Process Seniority & Leave Plans
- 23 Seniority & Leave Entries
 - 5 Service Months Entries
 - 15 Annual Leave Entries
 - 0 Vacation Entries
 - 0 Sick Entries
- 13 Leave Ledger Balances
 - 5 Service Months Balances
 - 5 Annual Leave Balances totaling 198.50
 - 0 Vacation Balances totaling 0.00
 - 0 Sick Balances totaling 0.00

AP - Invoicing

- Enter New Invoice
- Process Recurring Invoices
- Proof New Invoices
- Merge Invoices - \$16,498.20 (25 Invoices)

Dashboards Today

AATest
📄 + ✎
➤ Action Lists
➤ External Links

Process AP
Maintenance | Enter Invoices | Payments | Activity | Reporting
Add New:
Vendor Details

- Vendor
- Class
- Contact
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AP Setup

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AP - Invoicing

- Enter New Invoice
- Process Recurring Invoices
- Proof New Invoices
- Merge Invoices - \$16,498.20 (25 invoices)

Dashboard 2.0

InterActiv 2026 Good morning, Trent!
🏠 CEO | **Controller** | Payroll Manager

AP Outstanding
\$53,274.89
[View →](#)

AP Past Due
\$69,085.82
[View →](#)

AR Outstanding
\$8,737.24
[View →](#)

AR Over 90 Days
14
[View →](#)

Balance Sheet Explorer
Legend: Cash, Accounts Receivable, Accounts Payable, Accrued Liabilities, Long Term Debt
Balance Sheet: Cash + Accounts Receivable + Inventory + Accounts Payable + Accrued Liabilities + Long Term Debt
Fiscal Year 2011

Open Balance of Outstanding Invoic...
93%

Month-End Close
0 of 1 done
☐ Proof and merge all journal entries
893 / 0 Journal Entries
☐ Clear unbalanced journal entries
20 / 0 Journal Entries
☐ Fix AP invoices with invalid GL accounts
23 / 0 Invoices
☐ Fix AR invoices with invalid GL accounts

AP Invoices with Invalid GL Accounts
23
[View →](#)

AR Invoices Invalid GL Accounts
16
[View →](#)

Unbalanced Entries
20
[View →](#)

Unmerged Entries
893
[View →](#)

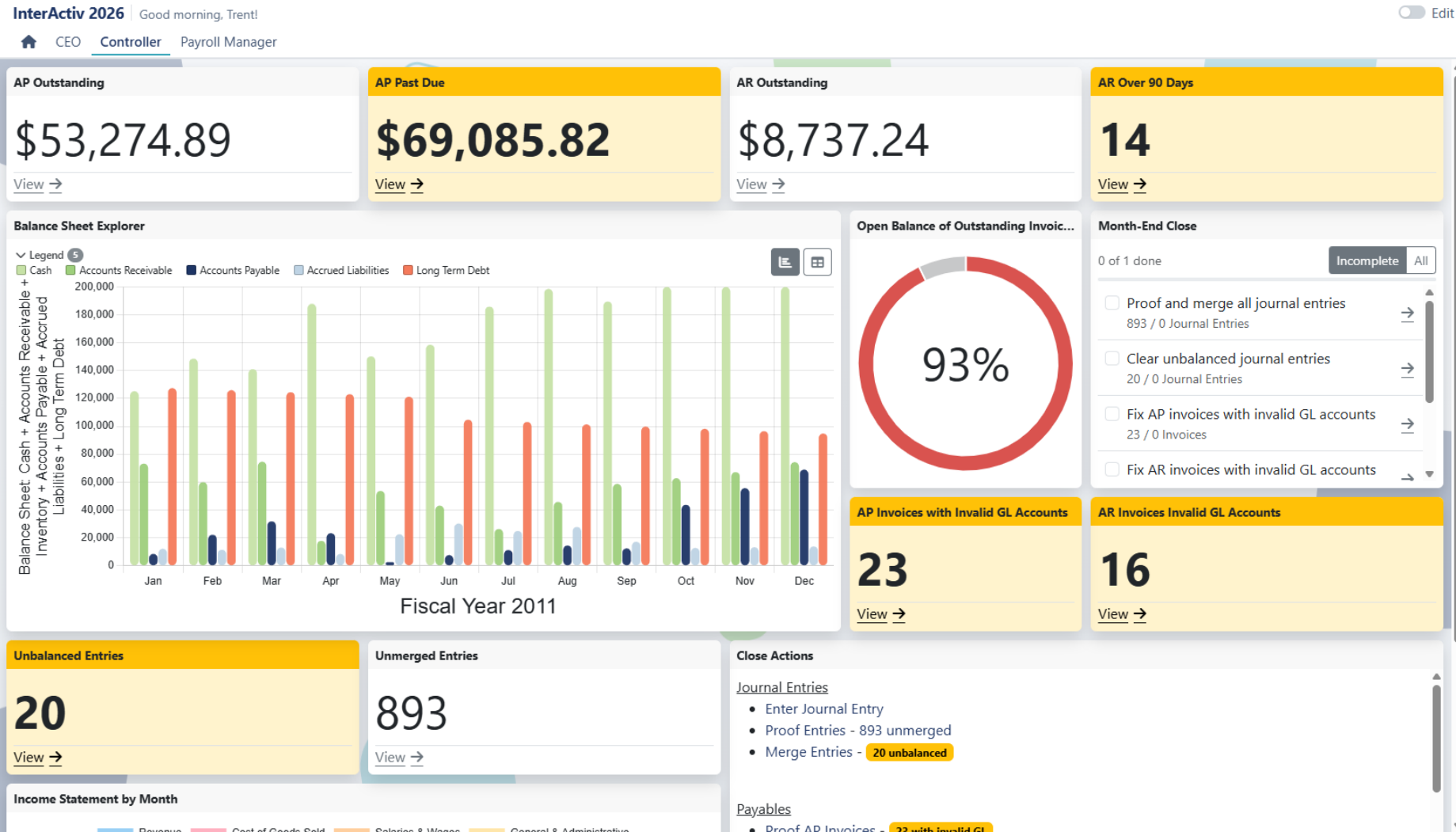
Close Actions
Journal Entries

- Enter Journal Entry
- Proof Entries - 893 unmerged
- Merge Entries - 20 unbalanced

Payables

- Proof AP Invoices - 23 with invalid GL

Dashboard 2.0



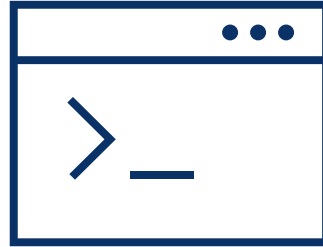
A large, stylized arrow graphic on the left side of the slide, pointing right. It has a dark blue body and a light blue outline, with a yellow-to-green gradient bar along its top edge.

When will Dashboard 2.0 be available?

Dashboard 2.0 will be released as part of
ActivityHD/ActivReporter version 9.28



Gadget



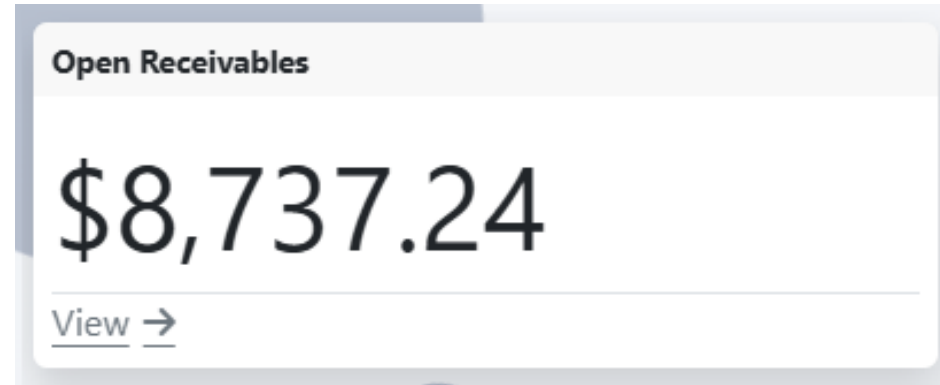
Layout



Dashboard

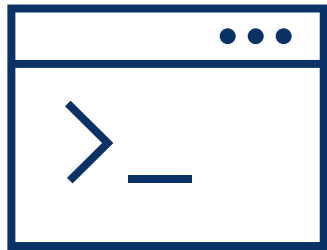


Gadget

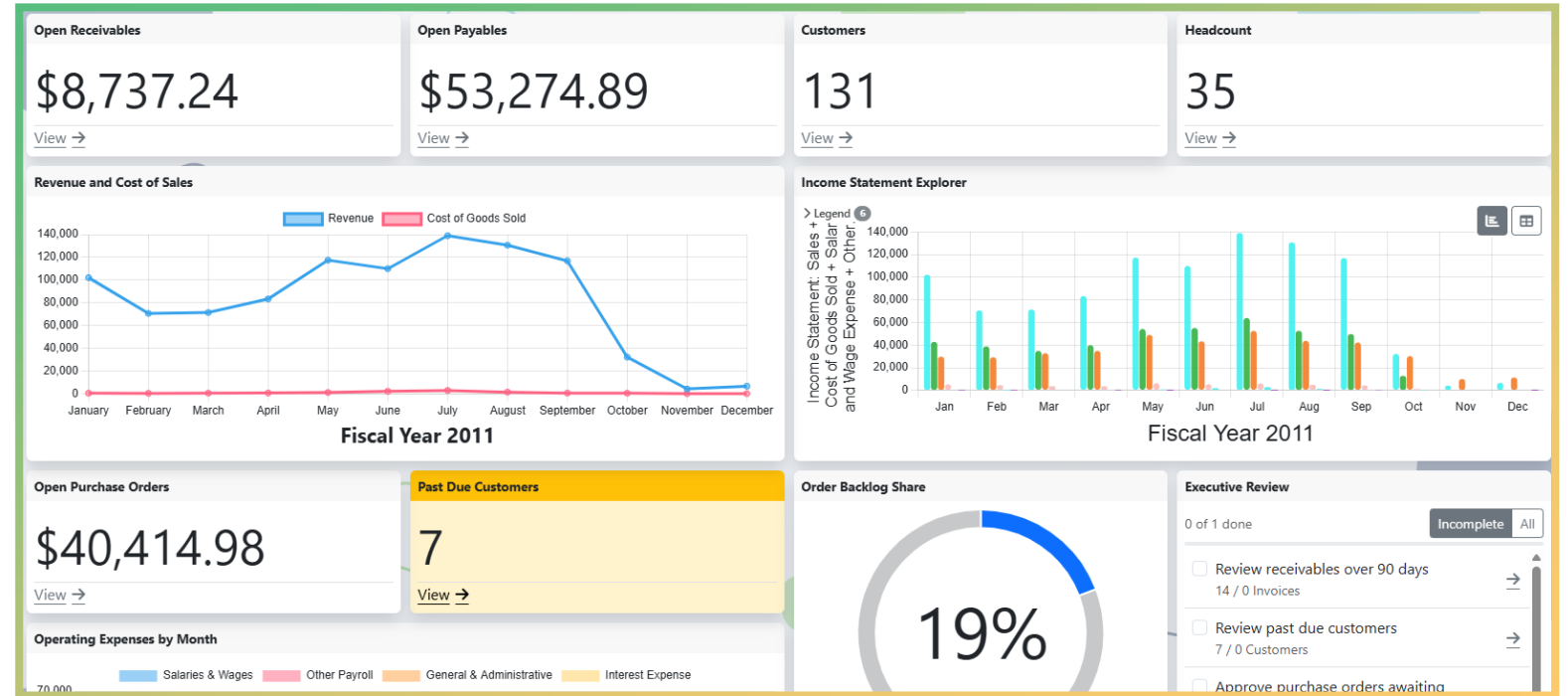


Gadget - An item that can be placed onto a Layout.

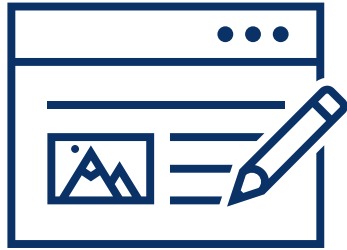
DASHBOARD TERMS



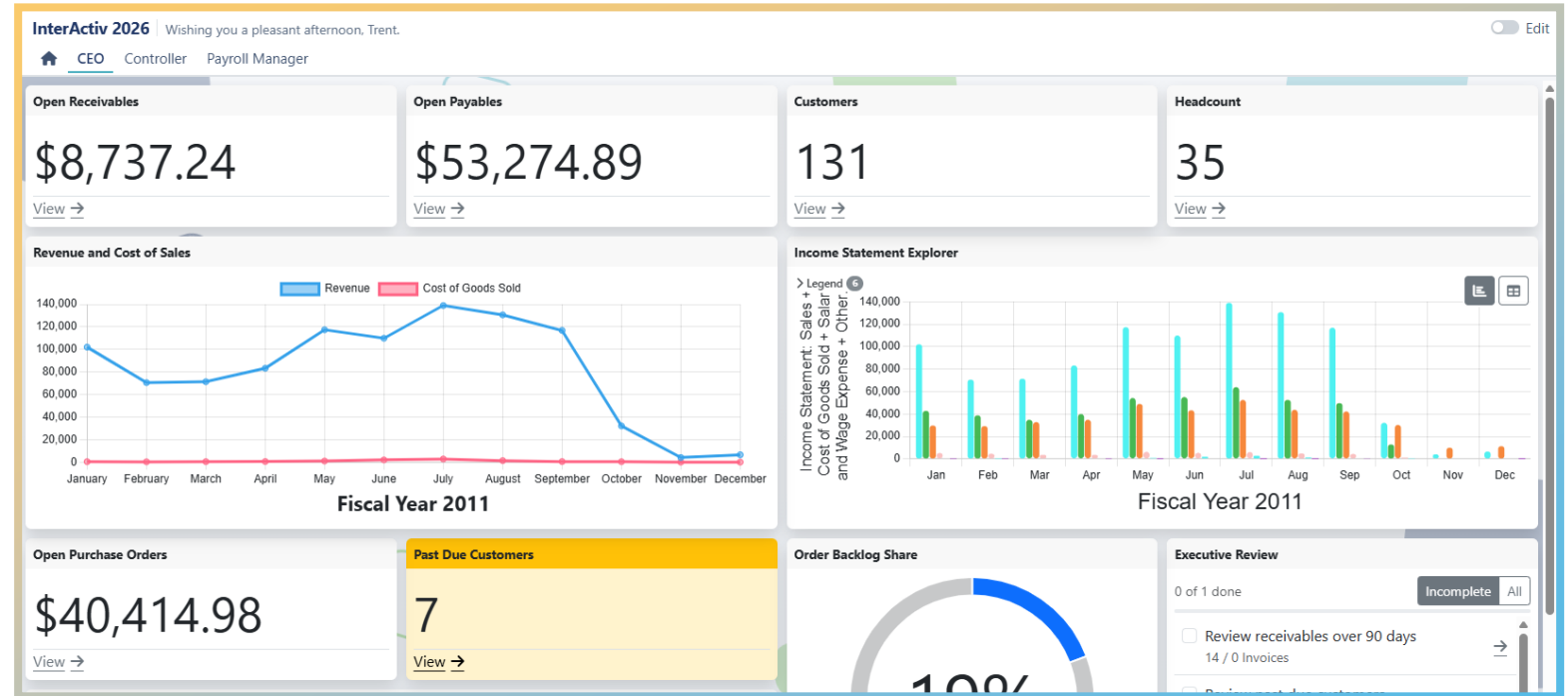
Layout



Layout – A collection of gadgets arranged in a grid.



Dashboard



Dashboard – View containing Layouts and Gadgets.

How to Visualize Your Data

“The goal with Dashboard 2.0 was to create an intuitive Dashboard experience that users could set up without having to learn any syntax, or code.”

Process Leave Plans

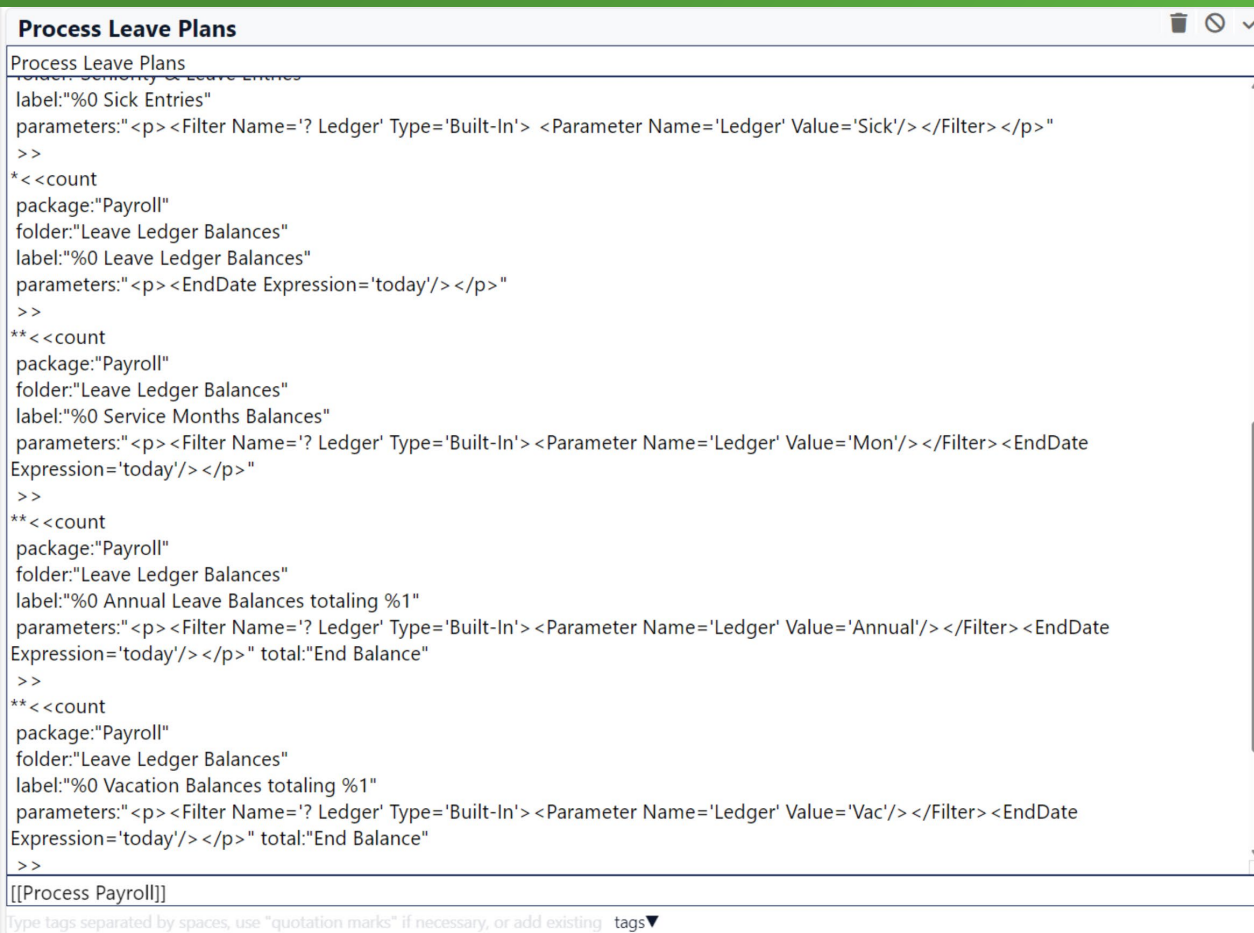
Process Leave Plans

```
label:"%0 Sick Entries"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Sick'> </Filter> </p>"
>>
*<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Leave Ledger Balances"
parameters:"<p><EndDate Expression='today'> </p>"
>>
**<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Service Months Balances"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Mon'> </Filter> <EndDate
Expression='today'> </p>"
>>
**<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Annual Leave Balances totaling %1"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Annual'> </Filter> <EndDate
Expression='today'> </p>" total:"End Balance"
>>
**<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Vacation Balances totaling %1"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Vac'> </Filter> <EndDate
Expression='today'> </p>" total:"End Balance"
>>
```

[[Process Payroll]]

Type tags separated by spaces, use "quotation marks" if necessary, or add existing tags▼

Before



```
Process Leave Plans
Process Leave Plans
label:"%0 Sick Entries"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Sick'> </Filter> </p>"
>>
*<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Leave Ledger Balances"
parameters:"<p><EndDate Expression='today'> </p>"
>>
**<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Service Months Balances"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Mon'> </Filter> <EndDate
Expression='today'> </p>"
>>
**<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Annual Leave Balances totaling %1"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Annual'> </Filter> <EndDate
Expression='today'> </p>" total:"End Balance"
>>
**<<count
package:"Payroll"
folder:"Leave Ledger Balances"
label:"%0 Vacation Balances totaling %1"
parameters:"<p><Filter Name='? Ledger' Type='Built-In'> <Parameter Name='Ledger' Value='Vac'> </Filter> <EndDate
Expression='today'> </p>" total:"End Balance"
>>
[[Process Payroll]]
Type tags separated by spaces, use "quotation marks" if necessary, or add existing tags▼
```

- Limited Formatting Options
- Harder to understand and build as a User
- Limited Error Handling
- Required Assistance



Action Link Properties

Package

Payroll



Folder

Seniority & Leave Plans

Action

Process

Parameters (XML)

Apply

Sans Serif Normal B I U    x_2 x^2 " " < />    

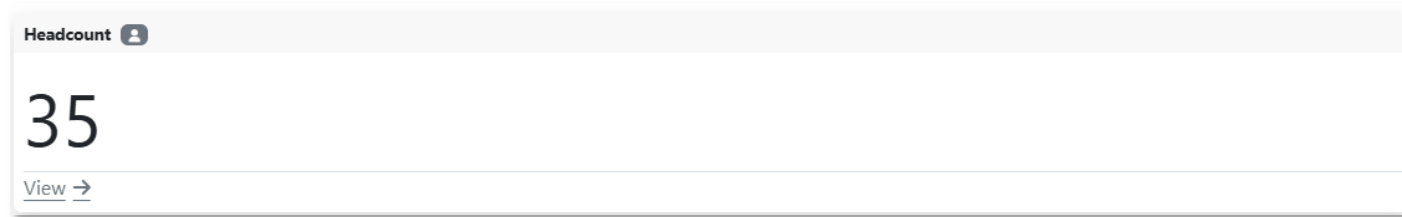
      

- Process Seniority & Leave Plans
- 23 Seniority & Leave Entries
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After

- WYSIWYG (What you see is what you get) editing.
- All new gadget configuration
- Live editor updates/error handling
- Still retain previous editing options

- **Count** – Shows a numeric value based on records from a view.



HOW TO VISUALIZE YOUR DATA - COUNT

- **Count** – Shows a numeric value based on records from a view.

Headcount

Tags: CEO x +

Package

Payroll

Folder

Employees

Total Column

of records

Filters ⓘ

Current Employees

[Advanced Options](#)

Preview

Headcount ⓘ

35

[View →](#)

HOW TO VISUALIZE YOUR DATA - COUNT

- **Count** – Shows a numeric value based on records from a view.

The screenshot displays a data visualization interface. At the top, a search bar contains the text "Current Employees Missing I-9". To its right, a "Tags" section shows "CEO" with a close button and a plus sign to add more tags. Below the search bar, there are three dropdown menus: "Package" set to "Payroll", "Folder" set to "Employees", and "Total Column" set to "# of records". A "Filters" section is expanded, showing a list of filter options: "? Social Insurance ...", "? Social Security ...", "? Terminated Between ...", "Current Employees" (checked), "Has Missing Location", "Missing I-9 Record" (checked), "Ready to Prenote", and "Terminated". On the right side, a "Preview" box displays the title "Current Employees Missing I-9" and a large numeric value "33". Below the value is a "View" link with a right-pointing arrow. The interface is clean and modern, with a light gray background and white panels for the filters and preview.

HOW TO VISUALIZE YOUR DATA - COUNT

- **Count** – Shows a numeric value based on records from a view.

Current Employees Missing I-9

Tags: CEO x +

of records

Filters ⓘ

Current Employees, Missing I-9 Record

[Advanced Options](#)

Format string ⓘ

%0

Parameters (XML) ⓘ

<View><Filters><Filter ID="{F13025A6-914B-420A-B870-29AE8661A408}" Name="Current Employees" Type="Built-In"/><Filter ID="{6D89954D-0ABF-4088-B440-1E7B63654CD8}" Name="Missing I-9 Record" Type="Built-In"/></Filters></View>

Highlight ⓘ

> 1

Bold ⓘ

> 10

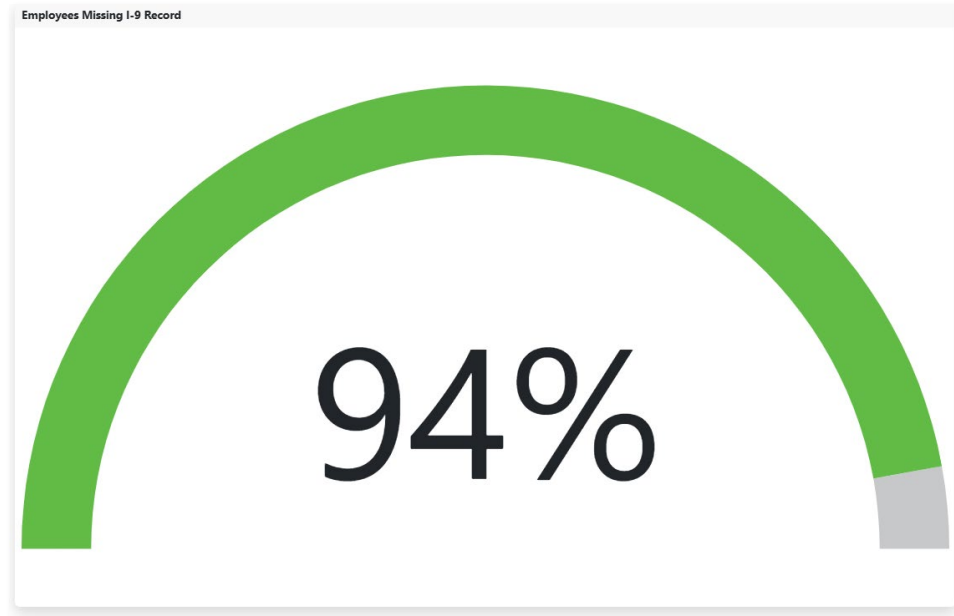
Preview

Current Employees Missing I-9

33

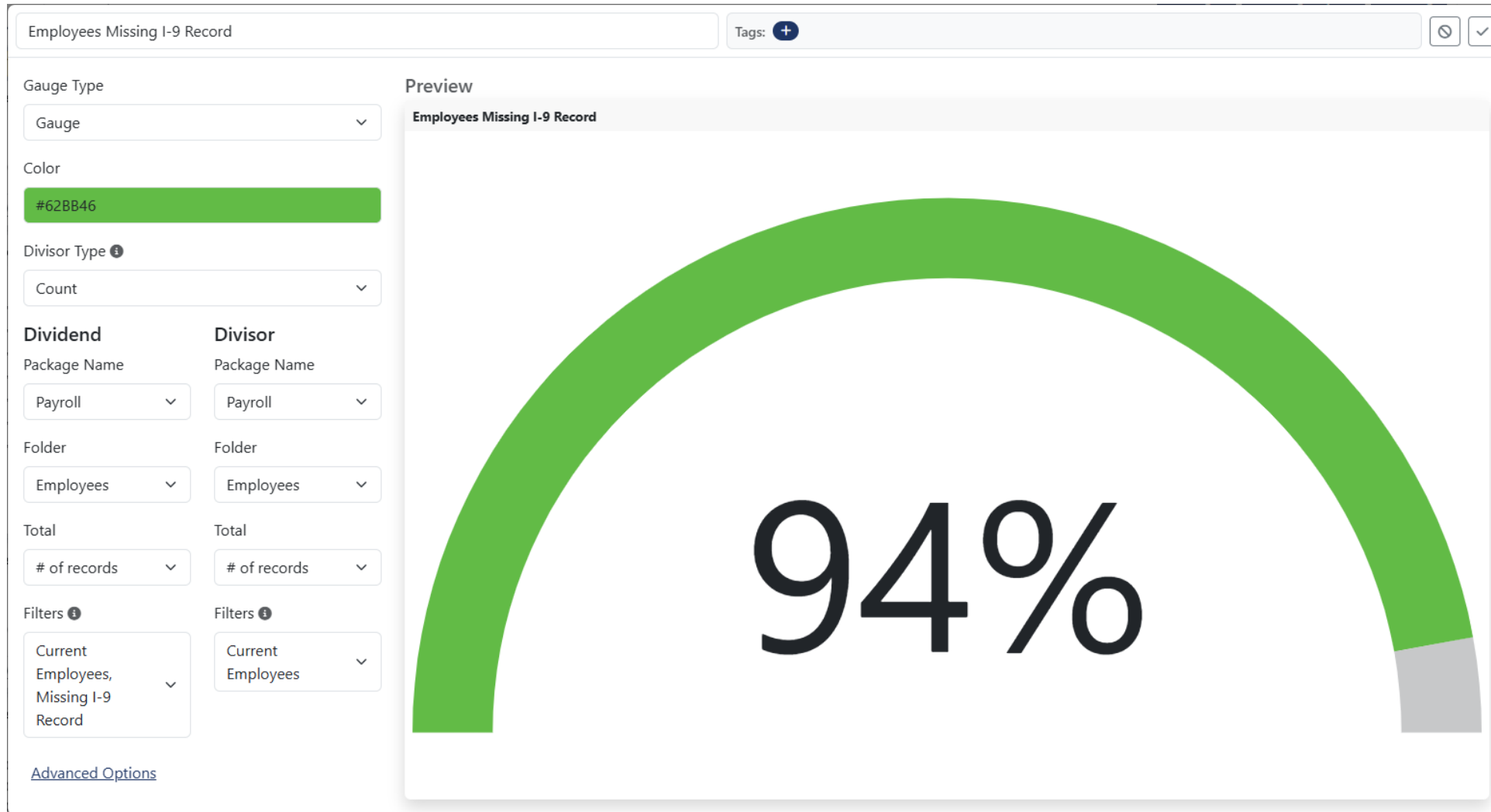
[View →](#)

- **Gauge** – Compares two numbers displaying a percentage.



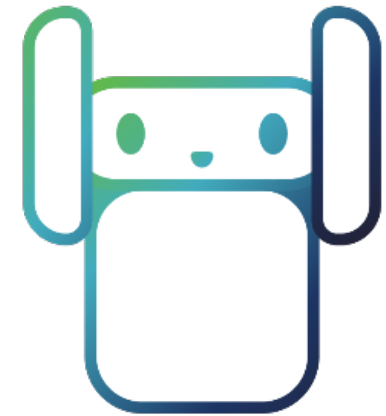
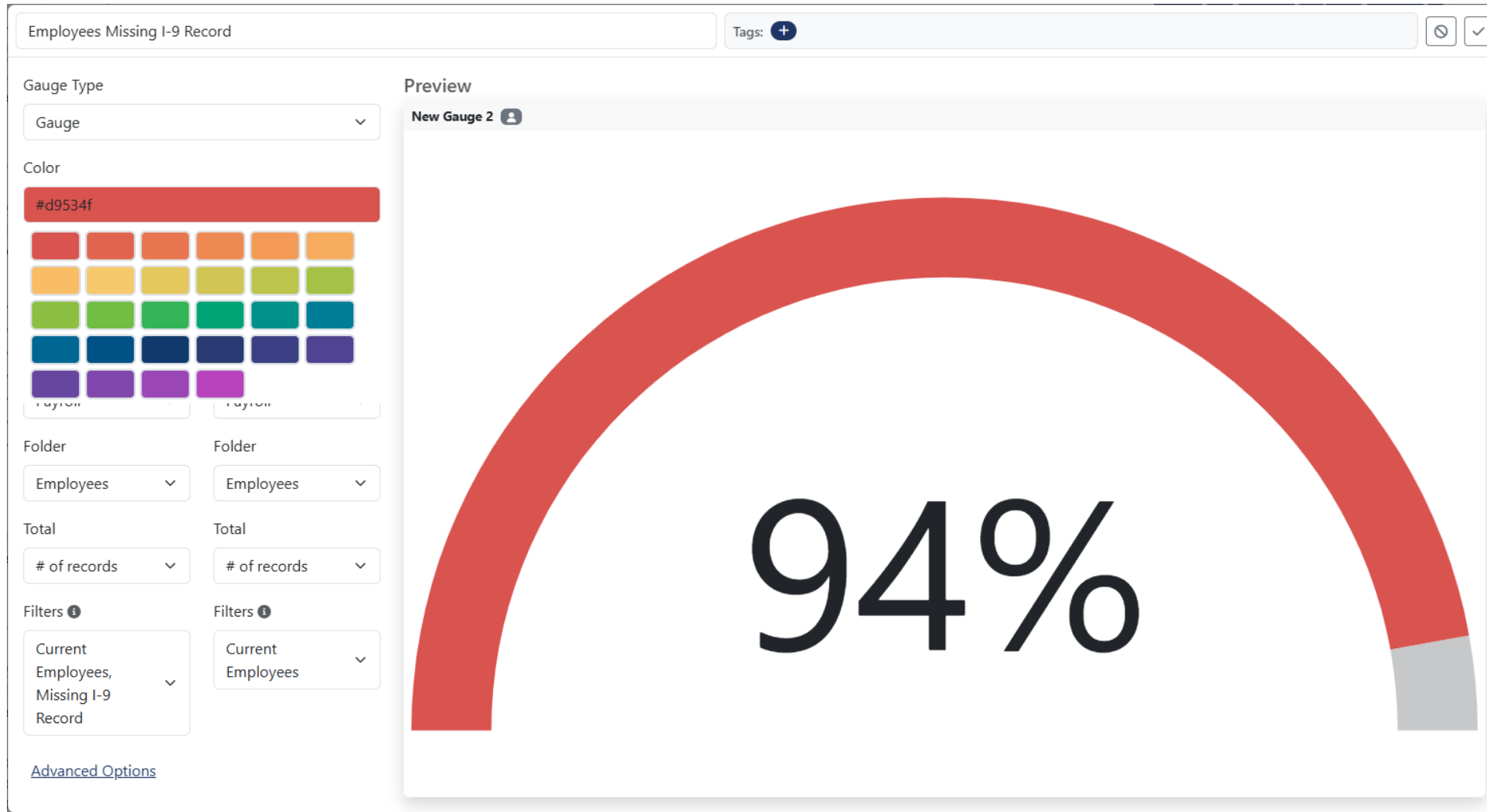
HOW TO VISUALIZE YOUR DATA - GAUGE

- **Gauge** – Compares two numbers displaying a percentage.



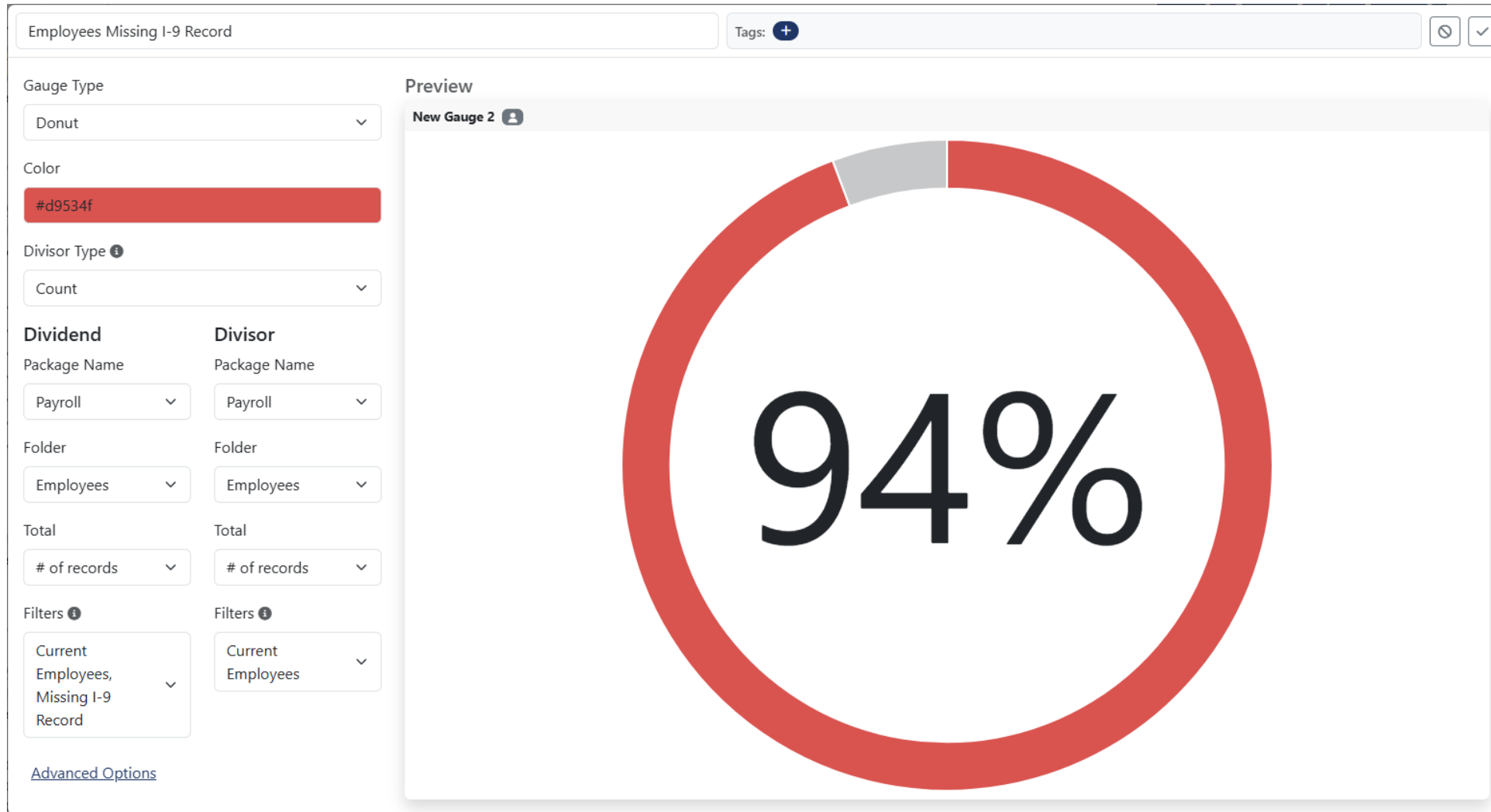
HOW TO VISUALIZE YOUR DATA - GAUGE

- **Gauge** – Compares two numbers displaying a percentage.



HOW TO VISUALIZE YOUR DATA - GAUGE

- **Gauge** – Compares two numbers displaying a percentage.



- **To-Do List** – A dynamic list of tasks that need to be completed based on certain conditions (time, date, record status, etc.)

Executive Review 

0 of 1 done

IncompleteAll

☐ Review receivables over 90 days
14 / 0 Invoices

→

☐ Review past due customers
7 / 0 Customers

→

☐ Approve purchase orders awaiting approval
2 / 0 Orders

→

☐ Review cash position and forecast

HOW TO VISUALIZE YOUR DATA - To-Do List

- **To-Do List** – A dynamic list of tasks that need to be completed based on certain conditions (time, date, record status, etc.)

Executive Review

Tags: CEO x +

+ Add Item

Review month-end financial statements

Review receivables over 90 days

Review past due customers

Approve purchase orders awaiting approval

Review cash position and forecast

Prepare quarterly board package

Preview

Executive Review

0 of 1 done

Incomplete All

☐ Review receivables over 90 days

14 / 0 Invoices

→

☐ Review past due customers

7 / 0 Customers

→

☐ Approve purchase orders awaiting approval

2 / 0 Orders

→

☐ Review cash position and forecast

HOW TO VISUALIZE YOUR DATA - To-Do List

- **To-Do List** – A dynamic list of tasks that need to be completed based on certain conditions (time, date, record status, etc.)

Executive Review

Tags: CEO x +

🗖️ ✓

+ Add Item

Review month-end financial statements ^

Task Description

Review month-end financial statements

Condition

Date/Time (schedule) v

Schedule Type

Monthly v

Time

--:-- -- ⌚

Day of Month

6

^ v

Delete

Review receivables over 90 days v

Review past due customers v

Approve purchase orders awaiting approval v

Preview

Executive Review 👤

0 of 1 done

Incomplete All

☐ Review receivables over 90 days
14 / 0 Invoices

→

☐ Review past due customers
7 / 0 Customers

→

☐ Approve purchase orders awaiting approval
2 / 0 Orders

→

☐ Review cash position and forecast

HOW TO VISUALIZE YOUR DATA - ARTICLE

- **Article** – A simple text based gadget to explain a process or present common information, can contain macros to show live numbers, perform actions, run reports, etc.

Article 2.0 Demo

Articles in Dashboard 2.0 are super easy to use! You can easily **format text** to look exactly how you want!

1. Create Lists
2. to define procedures

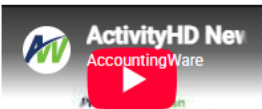
- Bullet points
- to organize your thoughts

Insert Links to webpages

Add Pictures:



Even Videos:



You can also use macros to perform different actions in Activity and see live data:

Number of employees: 75

Run timesheet import bot

Process Leave Plans

- Process Seniority & Leave Plans
- 23 Seniority & Leave Entries
 - 5 Service Months Entries
 - 15 Annual Leave Entries
 - 0 Vacation Entries
 - 0 Sick Entries
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HOW TO VISUALIZE YOUR DATA - ARTICLE

- **Article** – A simple text based gadget to explain a process or present common information, can contain macros to show live numbers, perform actions, run reports, etc.

Article 2.0 Demo

Tags: +

Article Gadget Editor

Write and format content using the toolbar. You can insert links, images, videos, live counts, and other elements from the toolbar. You can edit the properties of an element (count, link, image, etc.) by clicking on it.

Sans Serif Normal B I U S A x₂ x² ” ‘>

Articles in Dashboard 2.0 are super easy to use! You can easily **format** text to look exactly how you want!

1. Create Lists

2. to define procedures

• Bullet points

• to organize your thoughts

Insert **Links** to webpages

Add Pictures:



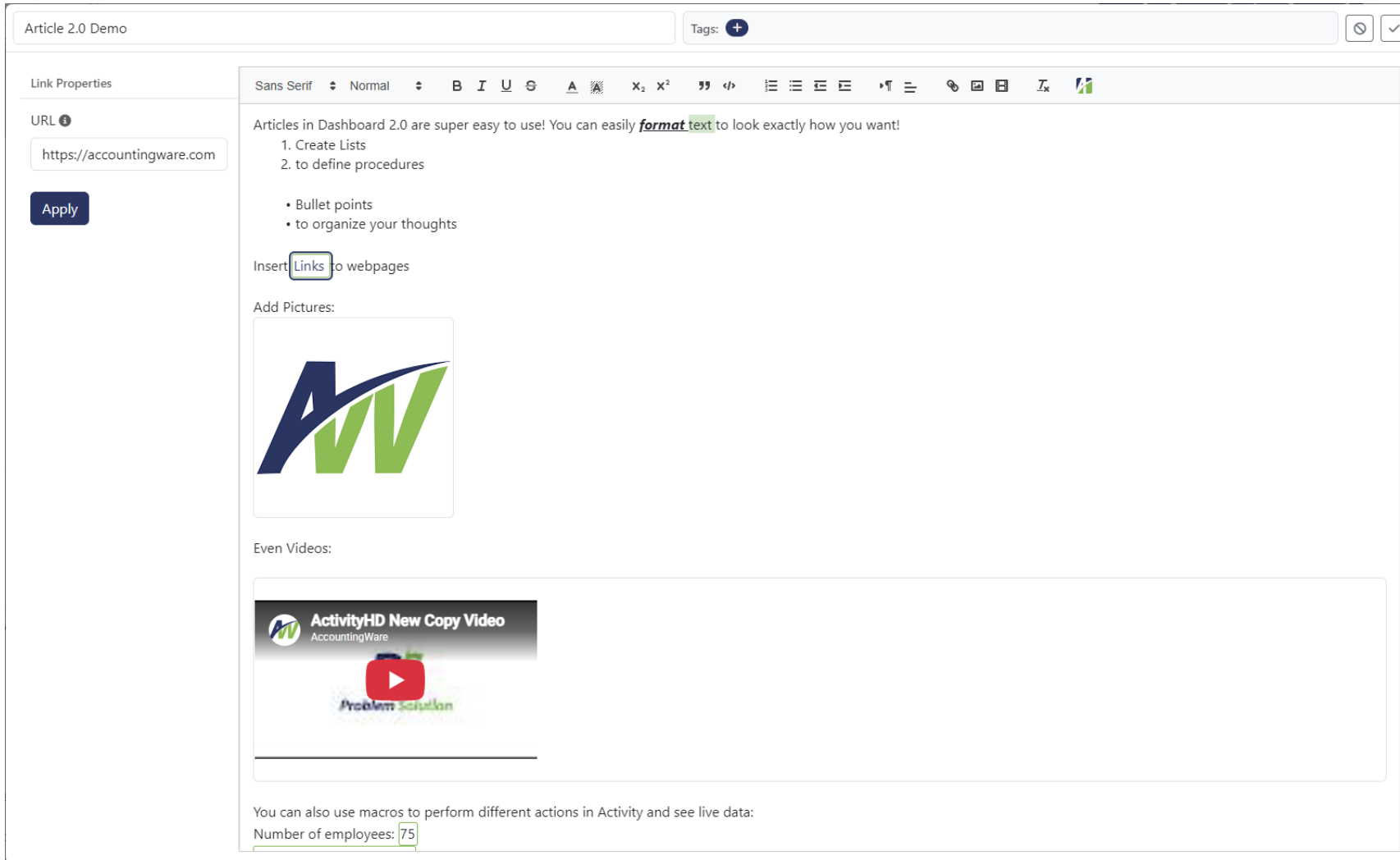
Even Videos:

 **ActivityHD New Copy Video**
AccountingWare


Problem Solution

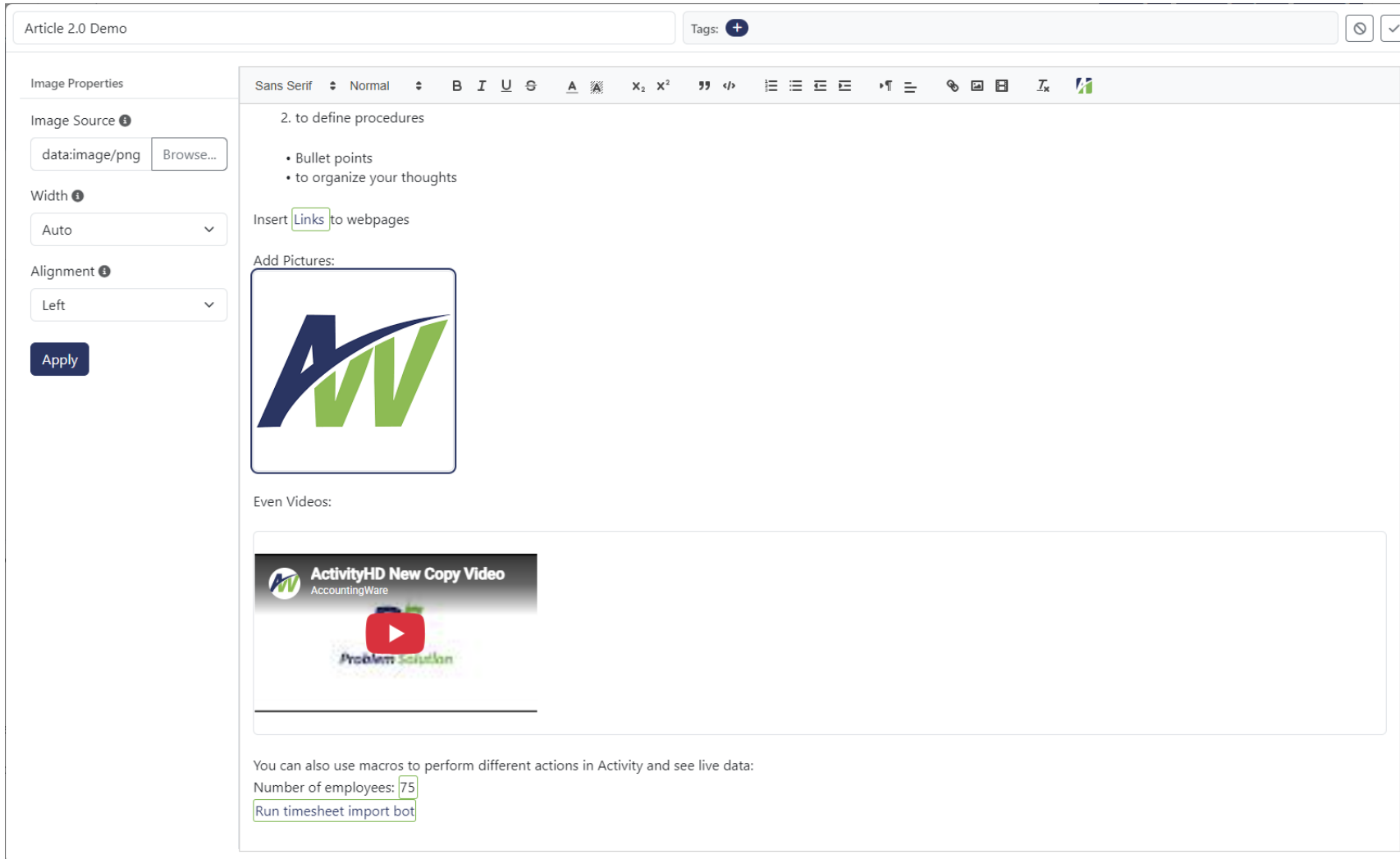
HOW TO VISUALIZE YOUR DATA - ARTICLE

- **Article** – A simple text based gadget to explain a process or present common information, can **CONTAIN** macros to show live numbers, perform actions, run reports, etc.



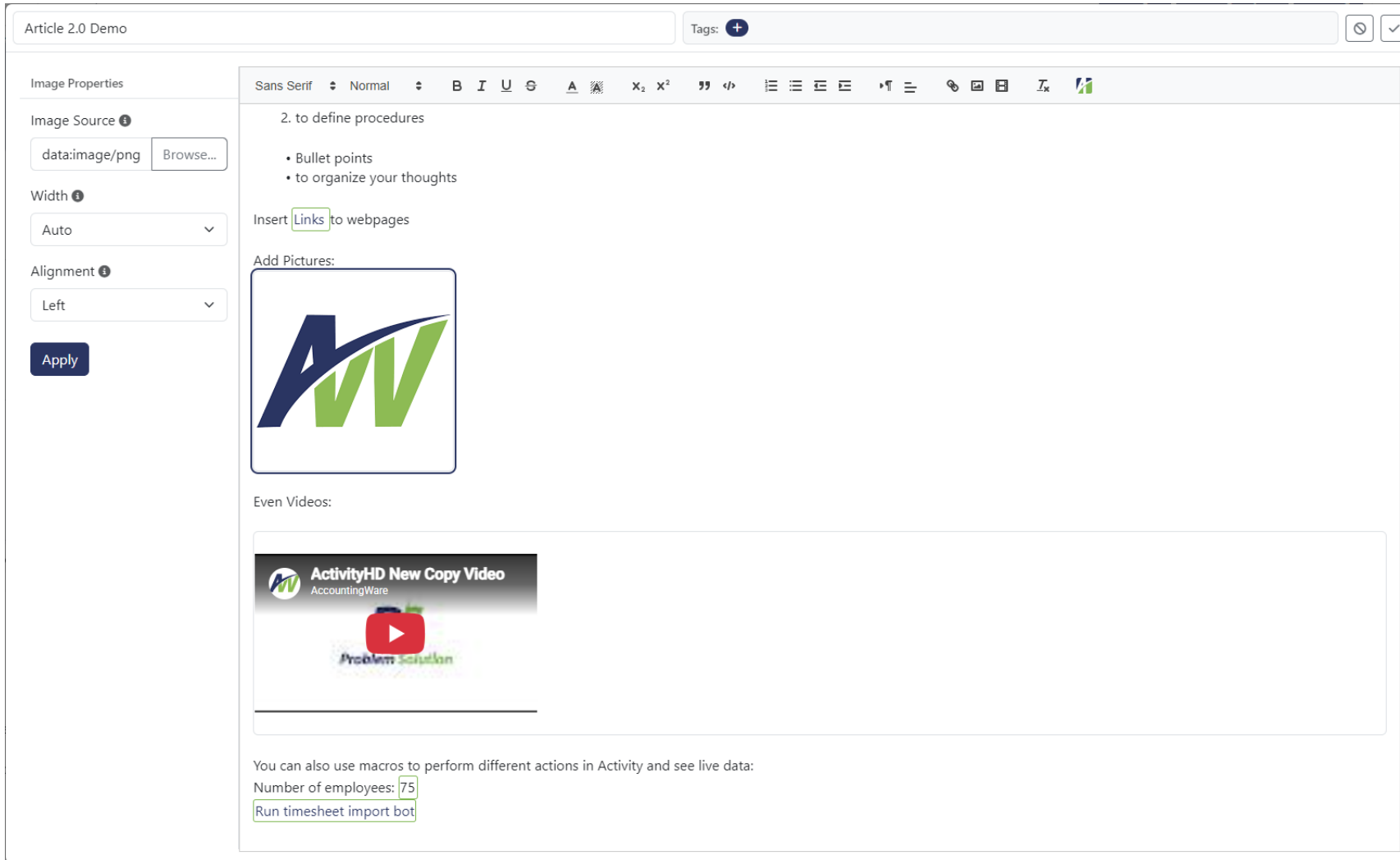
HOW TO VISUALIZE YOUR DATA - ARTICLE

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HOW TO VISUALIZE YOUR DATA - ARTICLE

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HOW TO VISUALIZE YOUR DATA - ARTICLE

- **Article** – A simple text based gadget to explain a process or present common information, can contain macros to show live numbers, perform actions, run reports, etc.

Article 2.0 Demo

Tags: +

Video Properties

Source URL ⓘ

Size ⓘ
Small (25%)

Alignment ⓘ
Left

Apply

Sans Serif Normal B I U x₂ x² “ ” < >

2. to define procedures

- Bullet points
- to organize your thoughts

Insert to webpages

Add Pictures:


Even Videos:

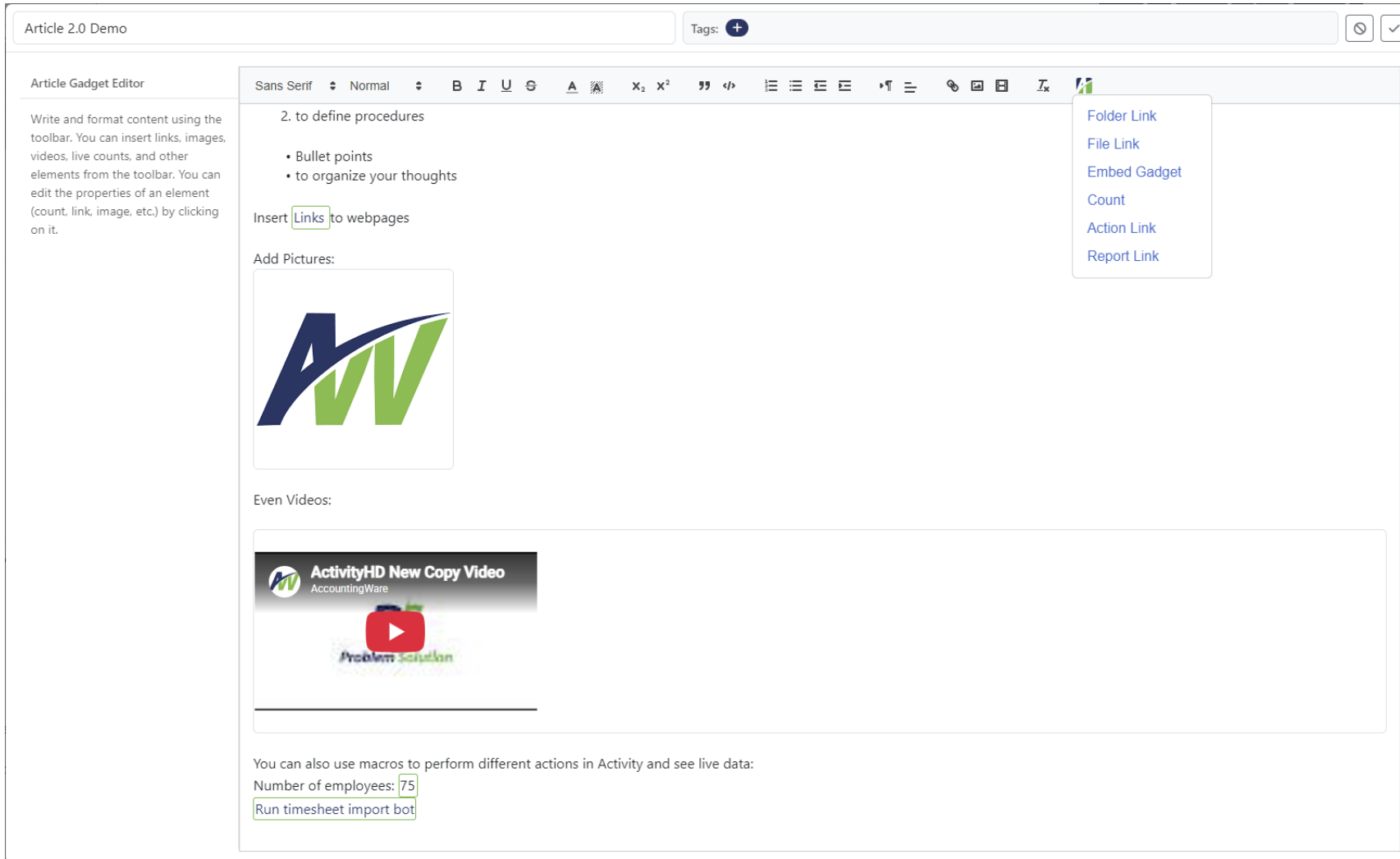
 **ActivityHD New Copy Video**
AccountingWare


Problem Solution

You can also use macros to perform different actions in Activity and see live data:
Number of employees:

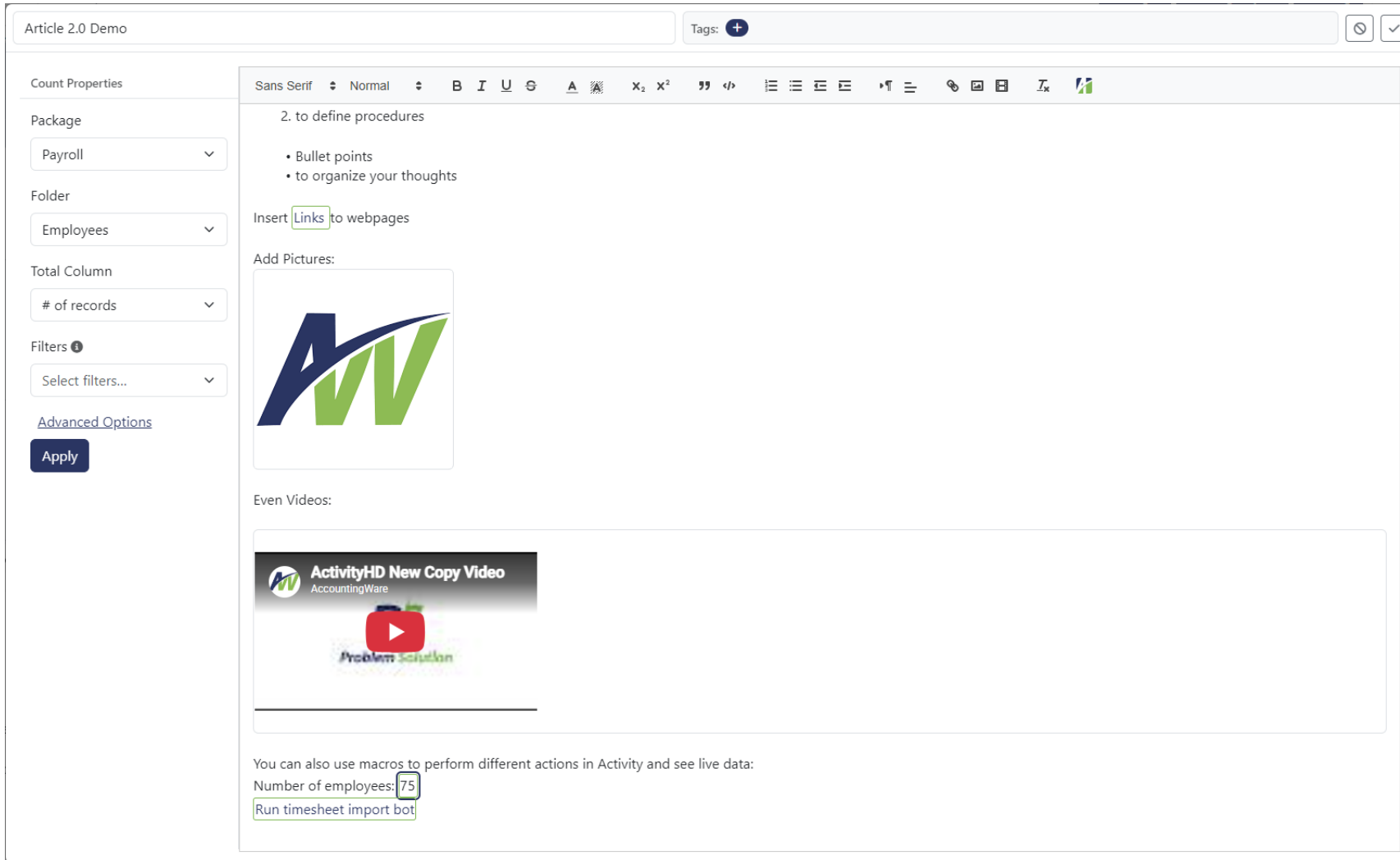
HOW TO VISUALIZE YOUR DATA - ARTICLE

- **Article** – A simple text based gadget to explain a process or present common information, can **CONTain** macros to show live numbers, perform actions, run reports, etc.



HOW TO VISUALIZE YOUR DATA - ARTICLE

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HOW TO VISUALIZE YOUR DATA - ARTICLE

- **Article** – A simple text based gadget to explain a process or present common information, can contain macros to show live numbers, perform actions, run reports, etc.

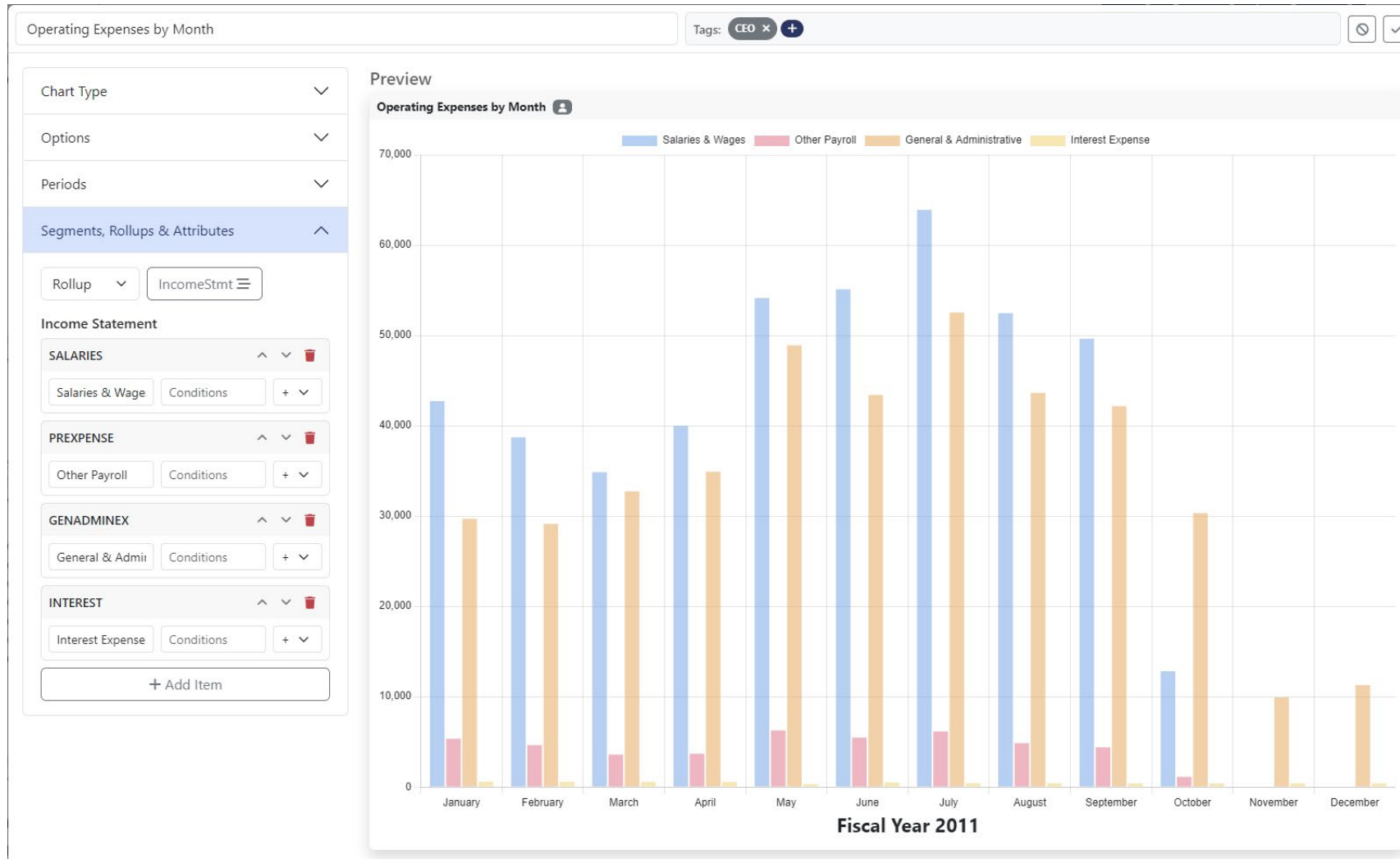
The screenshot displays the 'Article 2.0 Demo' interface. On the left, a sidebar titled 'Action Link Properties' contains configuration options: 'Package' (Activity Company), 'Folder' (Bots), 'Action' (Bot - TSheets), and 'Parameters (XML)'. An 'Apply' button is at the bottom of the sidebar. The main area features a rich text editor with a toolbar including options for font face (Sans Serif), size (Normal), bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, indent, outdent, and image. The editor content includes the heading '2. to define procedures', a bulleted list ('• Bullet points', '• to organize your thoughts'), a text line 'Insert [Links](#) to webpages', an 'Add Pictures:' section with a placeholder for the Activity logo, an 'Even Videos:' section with a placeholder for a video titled 'ActivityHD New Copy Video' by AccountingWare, and a final paragraph: 'You can also use macros to perform different actions in Activity and see live data:'. Below this paragraph are two macro placeholders: 'Number of employees: 75' and 'Run timesheet import bot'.

- **Financial Chart** – Live bar/line charts that display Financial information from the Financial Calculator

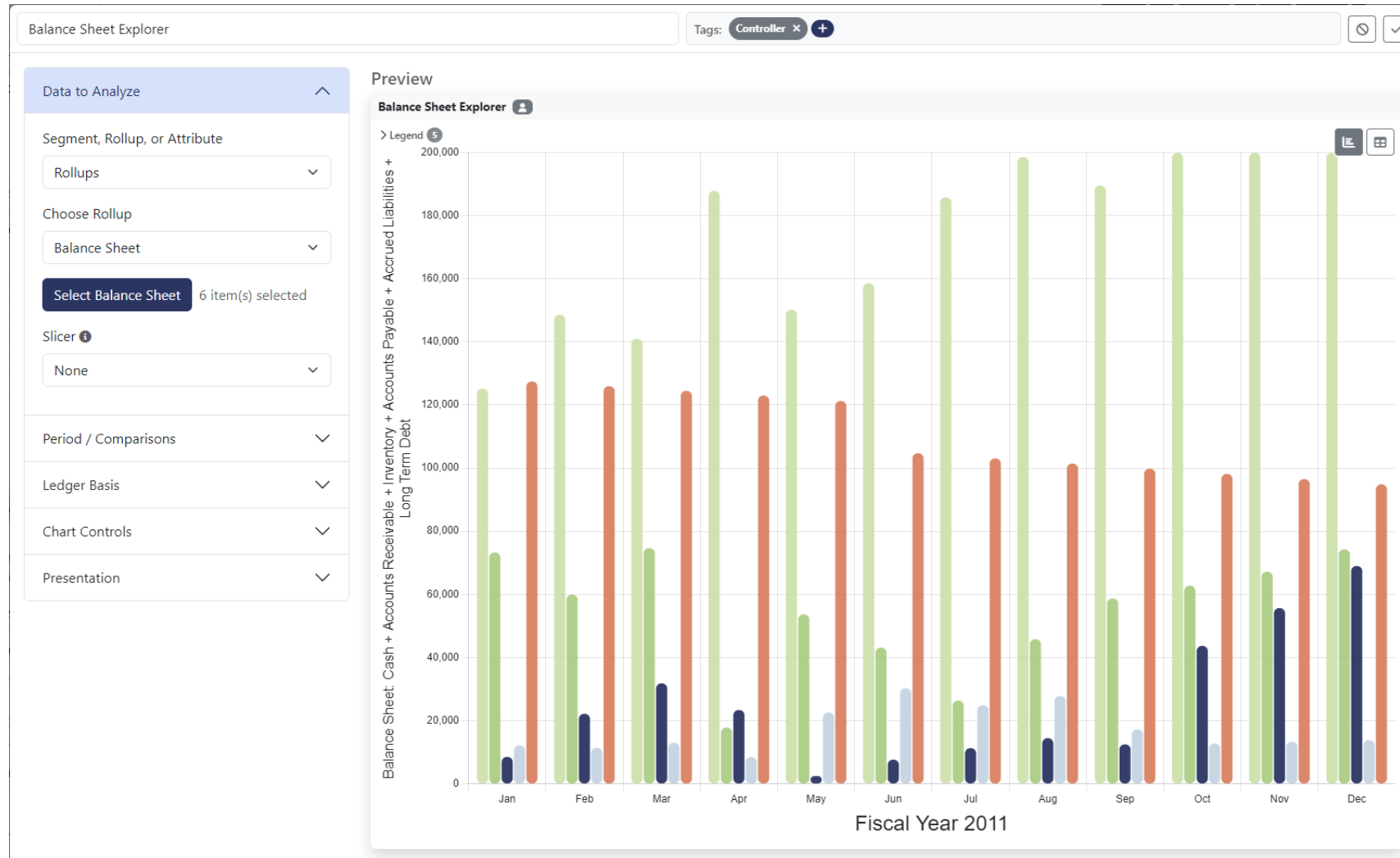


HOW TO VISUALIZE YOUR DATA – FINANCIAL CHART

- **Financial Chart** – Live bar/line charts that display Financial information from the Financial Calculator



- **Financial Chart** – Live bar/line charts that display Financial information from the Financial Calculator

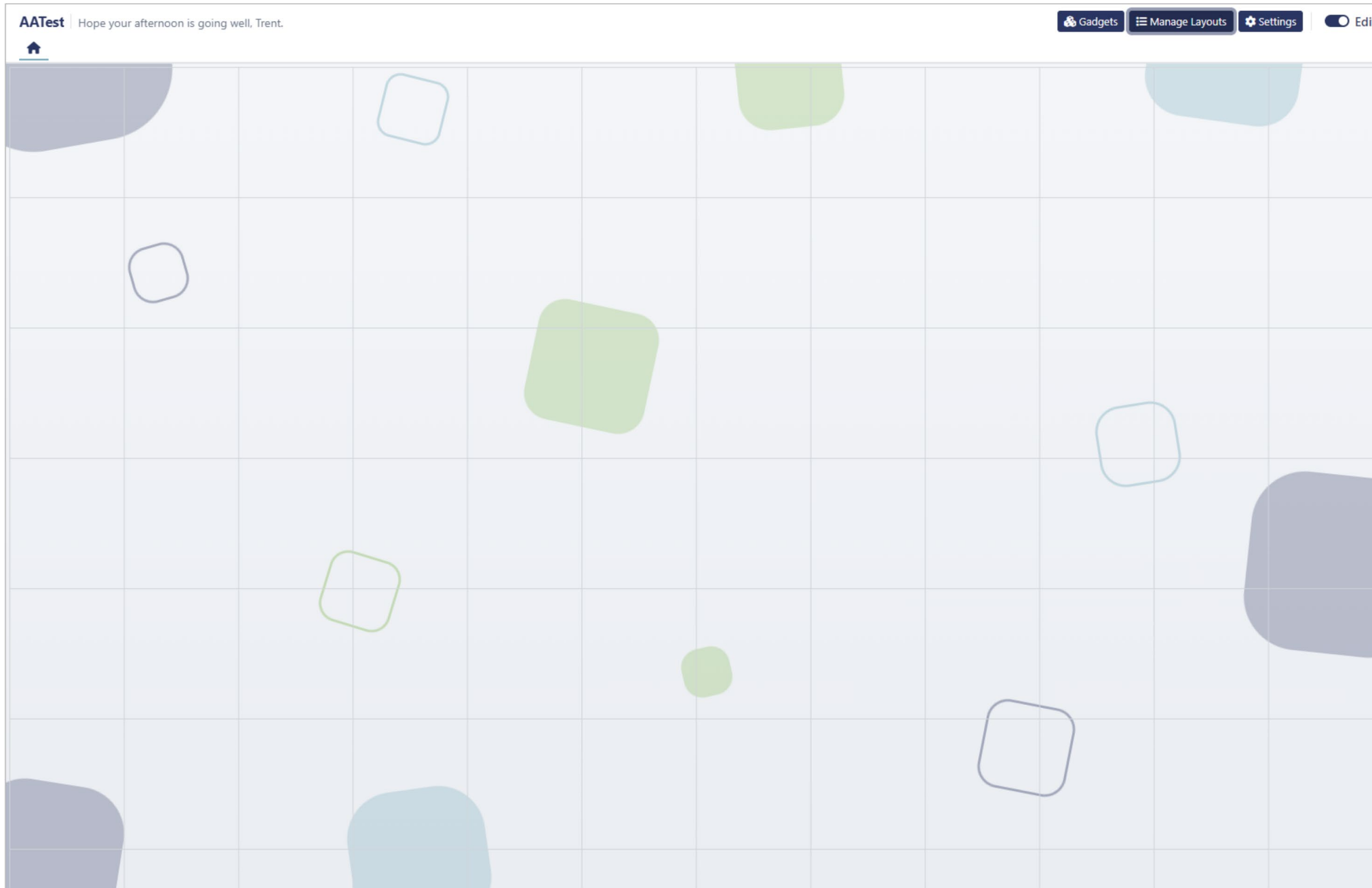


- Template
- Article (advanced)
 - Uses old syntax



Learn to Create Your Own Dashboard Layouts

HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT



HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

AATest

Good afternoon to you, Trent.

Gadgets

Manage Layouts

Settings

Edit

Layouts

✓

Your Layouts

Layouts visible on your dashboard.

Default

Create New Layout +

Shared Layouts

Layouts visible to others that can be added to your dashboard.

AATest Layout

+

CEO

+

Controller

+

Payroll Manager

+

HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

AATest

Good afternoon to you, Trent.

InterActiv 2026

Gadgets

Manage Layouts

Settings

Edit

Layouts

✓

Your Layouts

Layouts visible on your dashboard.

Default

InterActiv 2026

Share

Create New Layout +

Shared Layouts

Layouts visible to others that can be added to your dashboard.

AATest Layout

+

CEO

+

Controller

+

Payroll Manager

+

HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

AATest | Good afternoon to you, Trent.

Gadgets | Manage Layouts | Settings | Edit

InterActiv 2026



HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

Q Search Gadgets...

New Gadget

Gadget	Type	Tags	Access Control	
AP - Activity	Article (Advanced)		All	 
AP - Activity ARLAN	Article (Advanced)		All	 
AP - Invoicing	Article (Advanced)		All	 
AP - Maintenance	Article (Advanced)		All	 
AP - Payments	Article (Advanced)		All	 
AP - Reports	Article (Advanced)		All	 
AP Invoices with Invalid GL Accounts	Count	Controller	Personal	 Share   
AP Outstanding	Count	Controller	Personal	 Share   
AP Past Due	Count	Controller	Personal	 Share   

HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

AATest

Good afternoon to you, Trent.

Gadgets

Manage Layouts

Settings

Edit

InterActiv 2026

Search Gadgets...

New Gadget

Gadget	Type	Tags	Access Control	
AR - Finance Charges	Article (Advanced)		All	
AR - Invoice Activity	Article (Advanced)		All	
AR - Invoicing	Article (Advanced)		All	
AR - Maintenance	Article (Advanced)		All	
AR - Month End	Article (Advanced)	Action List	All	
AR - Receipt Activity	Article (Advanced)		All	
AR - Receive Payments	Article (Advanced)		All	
AR - Recent Activity	Article (Advanced)	Action List	All	
AR - Reports	Article (Advanced)		All	

HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

AATest

Good afternoon to you, Trent.

Gadgets

Manage Layouts

Settings

Edit

InterActiv 2026

AR - Month End

1. ☐ Process Recurring Invoices - \$530.00 (1 recurring invoices)

2. ☐ Analyze/Reconcile Aged Receivables

3. ☐ Assess Finance Charges

4. ☐ Generate & Print Statements

5. ☐ Tax Liability Report

HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

AATest

Good afternoon to you, Trent.

Gadgets

Manage Layouts

Settings

Edit

InterActiv 2026

AR - Month End

1. ☐ Process Recurring Invoices - \$530.00 (1 recurring invoices)

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HOW TO VISUALIZE YOUR DATA – CREATING YOUR FIRST LAYOUT

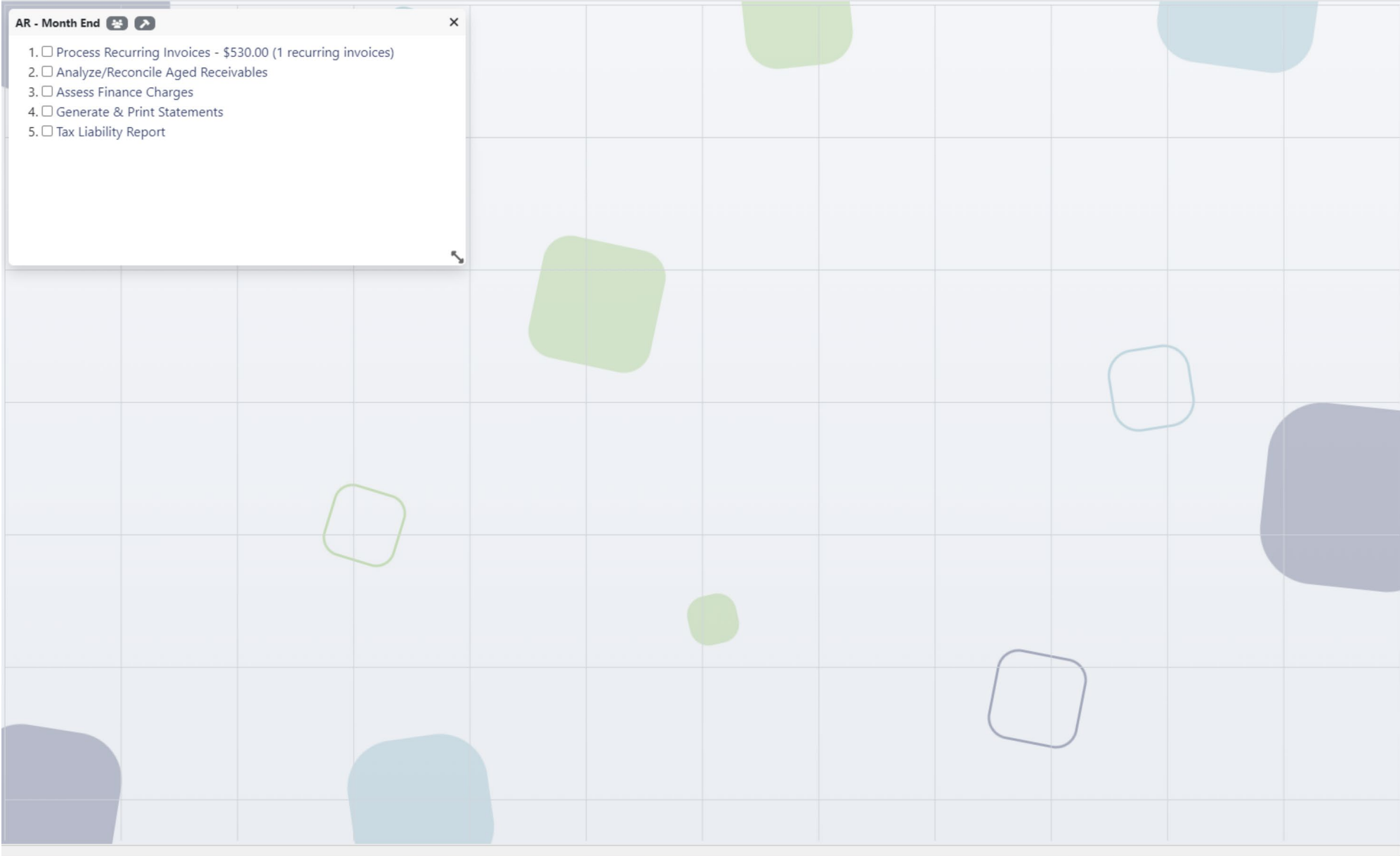
AATest | Good afternoon to you, Trent.

[Gadgets](#) | [Manage Layouts](#) | [Settings](#) | [Edit](#)

[InterActiv 2026](#)

AR - Month End  

- 1. ☐ Process Recurring Invoices - \$530.00 (1 recurring invoices)
- 2. ☐ Analyze/Reconcile Aged Receivables
- 3. ☐ Assess Finance Charges
- 4. ☐ Generate & Print Statements
- 5. ☐ Tax Liability Report



ACCESS CONTROL TYPES FOR GADGETS & LAYOUTS



Personal



Permitted



All



None

ACCESS CONTROL TYPES FOR GADGETS & LAYOUTS

Dashboard Gadget - "Process AR" for AATest - tbell (2)

New Read Save Report Previous Next

Dashboard Gadget for AATest

Name: Process AR Description: Process AR with Tabs Access Control: Permitted Owner: >

Access Control

☐ All - Available to all Users, independent of Permissions ☐ Personal - Available only to the Owner

☒ Permitted - Availability is determined by Permissions ☐ None - Unavailable to all Users, independent of Permissions

Available Permissions	Assigned Permissions
AATest Accts Payable Clerk Accts Payable Manager Accts Receivable Clerk (Invoicing) Accts Receivable Clerk (Receipts) Activate / Deactivate Change Logs Activate Indexes Activate or Deactivate Rollups Administrative Officer All - Master User AP Approval Entry AP Manager AP Payment Info For Invoice Approval AP Read Only AP Review AR Read Only AuthUsers Bank Reconciliations Change Authorized Users Change Security Permissions Collections Combine Segment Items Corporate Documents Data Access Bootstrap Delete Authorized Users Delete Calendars Delete Custom Data Delete Dashboard Gadgets Delete Dashboards Delete Rollup Items Delete Rollups Delete Security Delete Security Permissions Delete Segment Items Delete Units of Measure Edit or Change Authorized Users Edit or Change Calendars Edit or Change Custom Data Edit or Change Dashboard Gadgets	Accounting Supervisor Accts Receivable Manager

Gadget Advanced Permissions Layouts Change Logs Other Developer

Edit

Gain Key Insights Into Your Company's Data

GAIN KEY INSIGHTS - CEO

InterActiv 2026 | Good morning, Trent!

 Edit

 [CEO](#) [Controller](#) [Payroll Manager](#)

Open Receivables

\$8,737.24

[View](#) 

Open Payables

\$53,274.89

[View](#) 

Customers

131

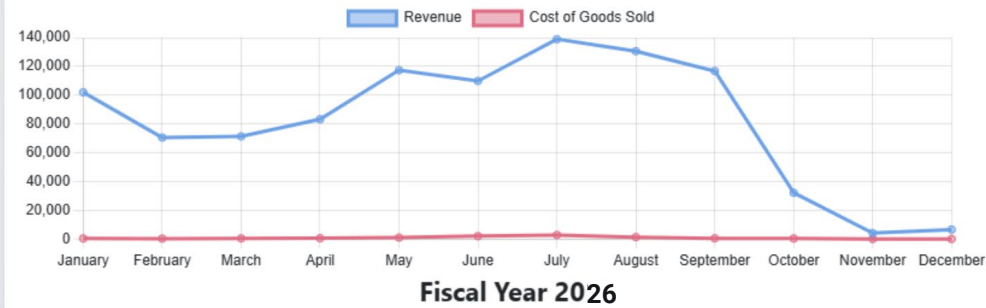
[View](#) 

Headcount

35

[View](#) 

Revenue and Cost of Sales



Open Purchase Orders

\$40,414.98

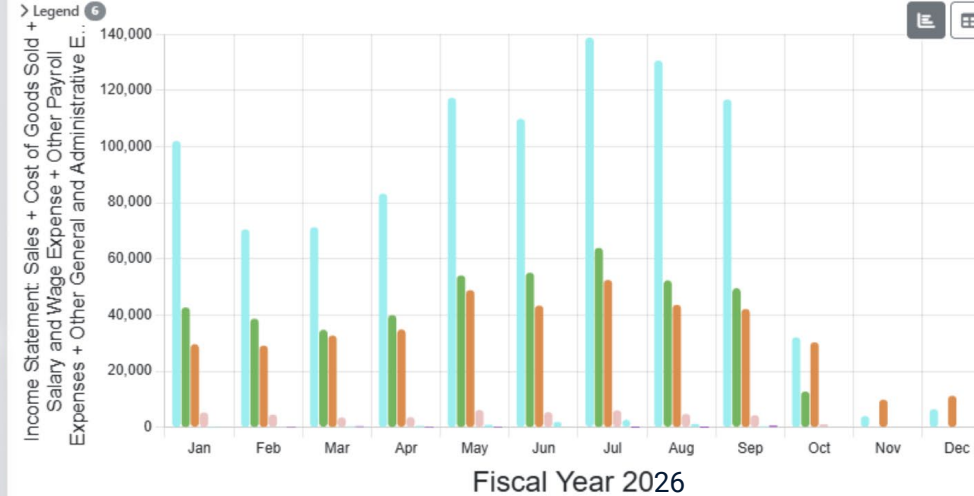
[View](#) 

Past Due Customers

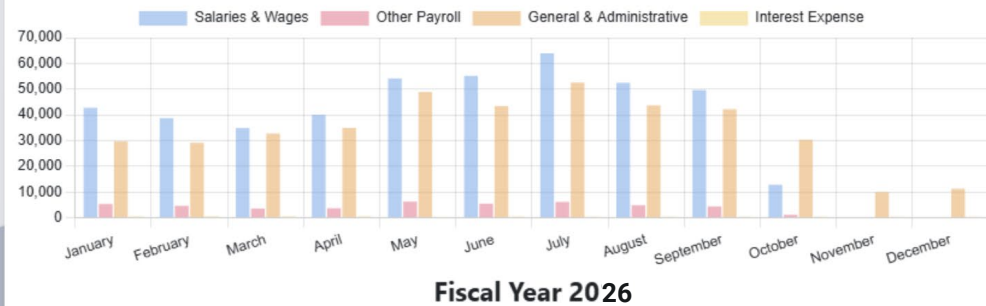
7

[View](#) 

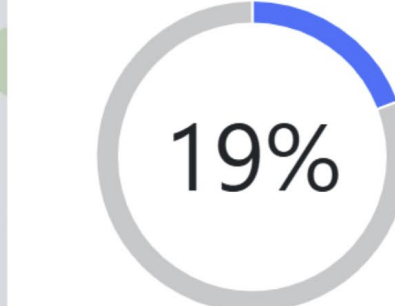
Income Statement Explorer



Operating Expenses by Month



Order Backlog Share



Executive Review

- 0 of 1 done Incomplete All
- ☐ Review receivables over 90 days
14 / 0 Invoices 
 - ☐ Review past due customers
7 / 0 Customers 
 - ☐ Approve purchase orders awaiting approval
2 / 0 Orders 
 - ☐ Review cash position and forecast

[Company Overview](#)

GAIN KEY INSIGHTS - CONTROLLER

InterActiv 2026 | Good morning, Trent!

Edit

CEO Controller Payroll Manager

AP Outstanding

\$53,274.89

[View →](#)

AP Past Due

\$69,085.82

[View →](#)

AR Outstanding

\$8,737.24

[View →](#)

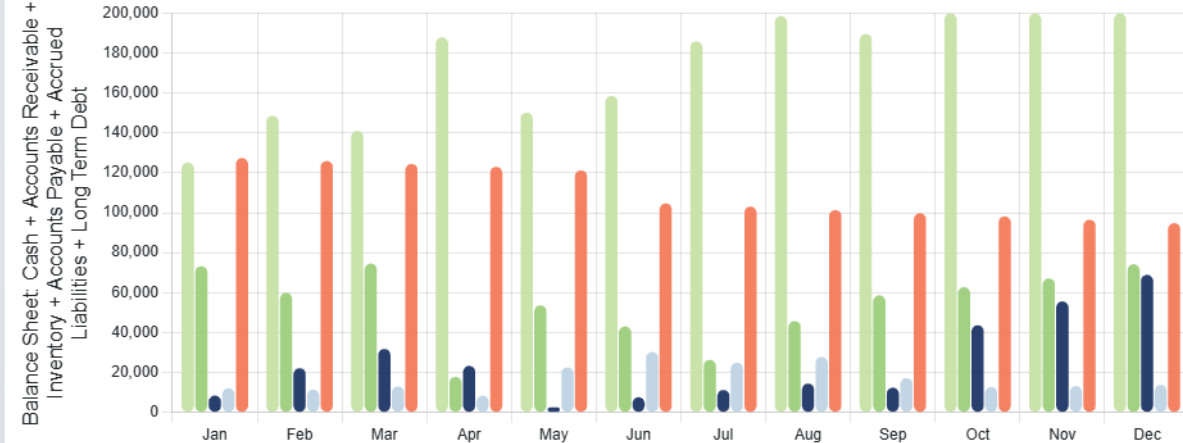
AR Over 90 Days

14

[View →](#)

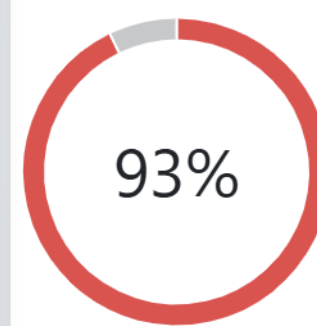
Balance Sheet Explorer

Legend 5
Cash Accounts Receivable Accounts Payable Accrued Liabilities Long Term Debt



Fiscal Year 2026

Open Balance of Outstanding Invoic...



Month-End Close

- 0 of 1 done Incomplete All
- ☐ Proof and merge all journal entries
893 / 0 Journal Entries [→](#)
 - ☐ Clear unbalanced journal entries
20 / 0 Journal Entries [→](#)
 - ☐ Fix AP invoices with invalid GL accounts
23 / 0 Invoices [→](#)
 - ☐ Fix AR invoices with invalid GL accounts [→](#)

AP Invoices with Invalid GL Accounts

23

[View →](#)

AR Invoices Invalid GL Accounts

16

[View →](#)

Unbalanced Entries

20

[View →](#)

Unmerged Entries

893

[View →](#)

Income Statement by Month

Revenue Cost of Goods Sold Salary & Wages General & Administrative

Close Actions

Journal Entries

- Enter Journal Entry
- Proof Entries - 893 unmerged
- Merge Entries - 20 unbalanced

Payables

- Proof AP Invoices - 23 with invalid GL

GAIN KEY INSIGHTS - PAYROLL MANAGER

InterActiv 2026 | Good morning, Trent!

Edit

CEO Controller **Payroll Manager**

Current Employees

35

[View →](#)

Unprocessed Time Sheets

6

[View →](#)

New Checks

0

[View →](#)

Net Pay (Merged Checks)

\$1,553,505.98

[View →](#)

Process Payroll

Import Time Proof Time Process Time Proof Checks Merge Checks Process Leave Print Checks

Direct Deposit Post to AP

- [Import Time Sheets](#)
- 6 unprocessed Time Sheets**

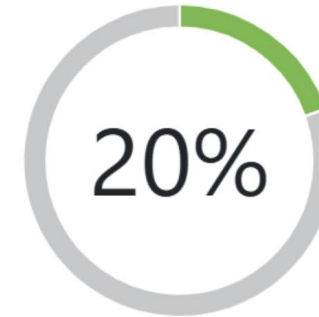
Payroll Cycle

0 of 2 done

Incomplete All

- ☐ Import time sheets
- ☐ Proof time sheets
6 / 0 Time Sheets [→](#)
- ☐ Fix checks with invalid GL accounts
1 / 0 Checks [→](#)
- ☐ Print payroll checks
276 / 0 Checks [→](#)

Direct Deposit Share of Net Pay



Ready to Print

276

[View →](#)

Ready for Direct Deposit

359

[View →](#)

Missing 1-9

33

[View →](#)

Zero or Negative Net Pay

0

[View →](#)

Payroll Expense by Month



Quick Actions

Time Sheets

- Enter Time Sheet
- Import Time Sheets
- Process Time Sheets - 6 unprocessed

Checks

- Proof Checks - 0 new
- Recalculate Checks
- Merge Checks
- Print Checks - 276 ready
- Generate Direct Deposit - 359 ready

All data on the dashboard is live,
and nearly all gadget types support
drilldown.

GAIN KEY INSIGHTS-DRILLDOWN

InterActiv 2026 | Good morning, Trent!

Edit

CEO Controller Payroll Manager

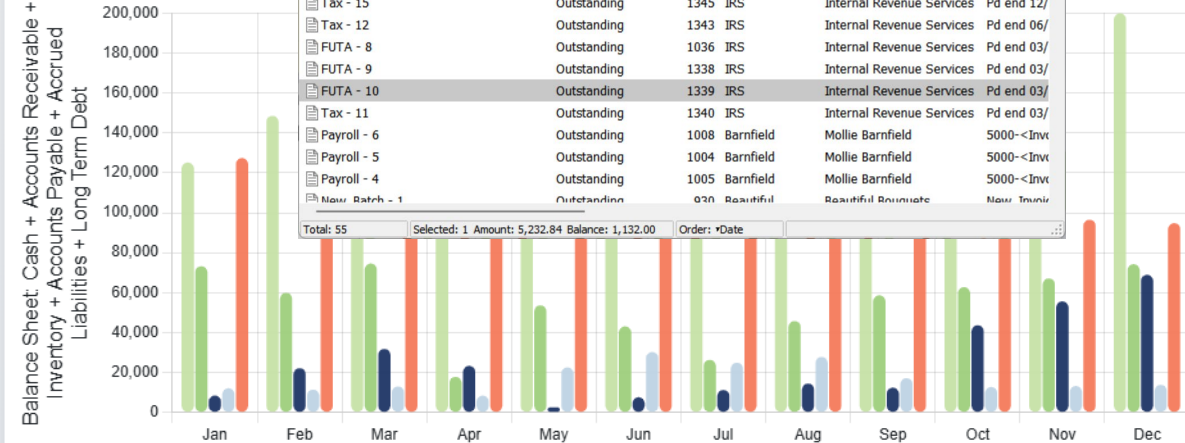
AP Outstanding

\$53,274.8

View

Balance Sheet Explorer

Legend
Cash Accounts Receivable Accounts Payable



Fiscal Year 2026

Unbalanced Entries

20

View

Income Statement by Month

Revenue Cost of Goods Sold Salary & Wages General & Administrative

AP Invoices for AATest - tbell (2)

Batch - #	Status	Merge #	Vendor	Vendor Description	Invoice #
pay - 362	Outstanding	2124	Retro	Retro Photography	21025
Tax - 13	Outstanding	1341	IRS	Internal Revenue Services	Pd end 06/
Tax - 14	Outstanding	1344	IRS	Internal Revenue Services	Pd end 09/
Tax - 15	Outstanding	1345	IRS	Internal Revenue Services	Pd end 12/
Tax - 12	Outstanding	1343	IRS	Internal Revenue Services	Pd end 06/
FUTA - 8	Outstanding	1036	IRS	Internal Revenue Services	Pd end 03/
FUTA - 9	Outstanding	1338	IRS	Internal Revenue Services	Pd end 03/
FUTA - 10	Outstanding	1339	IRS	Internal Revenue Services	Pd end 03/
Tax - 11	Outstanding	1340	IRS	Internal Revenue Services	Pd end 03/
Payroll - 6	Outstanding	1008	Barnfield	Mollie Barnfield	5000-<Inv
Payroll - 5	Outstanding	1004	Barnfield	Mollie Barnfield	5000-<Inv
Payroll - 4	Outstanding	1005	Barnfield	Mollie Barnfield	5000-<Inv
Now Batch - 1	Outstanding	020	Beautiful	Beautiful Brumate	Now Trunc

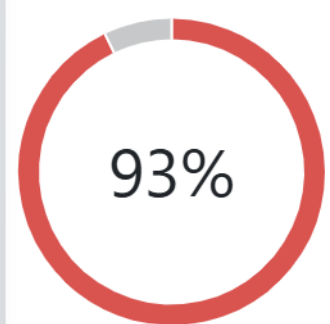
Total: 55 Selected: 1 Amount: 5,232.84 Balance: 1,132.00 Order: *Date

AR Outstanding

\$8,737.24

View

Open Balance of Outstanding Invo...



AP Invoices with Invalid GL Accounts

23

View

AR Over 90 Days

14

View

Month-End Close

0 of 1 done

Incomplete All

☐ Proof and merge all journal entries
893 / 0 Journal Entries

☐ Clear unbalanced journal entries
20 / 0 Journal Entries

☐ Fix AP invoices with invalid GL accounts
23 / 0 Invoices

☐ Fix AR invoices with invalid GL accounts

AR Invoices Invalid GL Accounts

16

View

Close Actions

Journal Entries

- Enter Journal Entry
- Proof Entries - 893 unmerged
- Merge Entries - 20 unbalanced

Payables

- Proof AP Invoices - 23 with invalid GL

GAIN KEY INSIGHTS-DRILLDOWN

Drilldown Explorer for AATest - tbell (2)

Function: Balance

Calendar Period: Month 2011 - 1 (1/1/2011 - 1/31/2011) As of: Include Unmerged

Items Expression: GL.Rollup.BalSheet='CASH' and Ledger=A

Calculate - 125,138.01 Missing AcctType assignments for the "A" Ledger

Journal Detail

Options: Personal

Filters: Lookup:

Journal Entry	Li...	Account	Account Description	Post Date	Debit
AR - 20	1	0-1000-01-00000...	Corporate Checking Account	2/22/2010	123.45
bonus - 3	1	0-1030-01-00000...	Payroll Checking Account	12/17/2010	
cash - 1	1	0-1000-01-00000...	Corporate Checking Account	3/8/2010	8,590.72
cash - 2	1	0-1000-01-00000...	Corporate Checking Account	6/26/2010	0.00
Cash - 4	1	0-1000-01-00000...	Corporate Checking Account	9/20/2010	
cash - 6	1	0-1000-01-00000...	Corporate Checking Account	1/25/2010	964.46
cash - 9	1	0-1000-01-00000...	Corporate Checking Account	10/1/2010	257.76
cc - 1	1	0-1000-01-00000...	Corporate Checking Account	9/10/2010	8,858.55
cc - 2	1	0-1000-01-00000...	Corporate Checking Account	9/20/2010	14,174.75
deposit - 1	1	0-1000-01-00000...	Corporate Checking Account	4/23/2010	2,895.69
deposit - 2	1	0-1000-01-00000...	Corporate Checking Account	8/12/2010	4,384.13

Journal Detail Subsidiary Detail

Total: 471 Selected: 1 Debit: 123.45 Credit: 0.00 Net: 123.45 Order: *Journal Entry, *Line

Balance Inven

Fiscal Year 2026

AR Outstanding

\$8,737.24

View →

AR Over 90 Days

14

View →

Open Balance of Outstanding Invoic...

93%

Month-End Close

0 of 1 done

Incomplete All

☐ Proof and merge all journal entries
893 / 0 Journal Entries

☐ Clear unbalanced journal entries
20 / 0 Journal Entries

☐ Fix AP invoices with invalid GL accounts
23 / 0 Invoices

☐ Fix AR invoices with invalid GL accounts

AP Invoices with Invalid GL Accounts

23

View →

AR Invoices Invalid GL Accounts

16

View →

Unbalanced Entries

20

View →

Unmerged Entries

893

View →

Close Actions

Journal Entries

- Enter Journal Entry
- Proof Entries - 893 unmerged
- Merge Entries - 20 unbalanced

Payables

- Proof AP Invoices - 23 with invalid GL

Income Statement by Month

Revenue Cost of Goods Sold Salary & Wages General & Administrative

GAIN KEY INSIGHTS-DRILLDOWN

Drilldown Explorer for AATest - tbell (2)

Function: Balance

Calendar Period: Month 2011 - 1 (1/1/2011 - 1/31/2011) As of: Include Unmerged

Items Expression: GL.Rollup.BalSheet='CASH' and Ledger=A

Calculate 125,138.01 Missing AcctType assignments for the "A" Ledger

Journal Detail

Options: Personal

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Journal Entry	Li...	Account	Account Description	Post Date	Debit
AR - 20	1	0-1000-01-00000...	Corporate Checking Account	2/22/2010	123.45
bonus - 3	1	0-1030-01-00000...	Payroll Checking Account	12/17/2010	

AP Invoices for AATest

Options: Personal

Filters: Outstanding Invoices Lookup:

Batch - #	Status	Merge #	Vendor	Vendor Description	Invoice #	
pay - 362	Outstanding	2124	Retro	Retro Photography	21025	8/1/2
Tax - 13	Outstanding	1341	IRS	Internal Revenue Services	Pd end 06/22...	9/13/
Tax - 14	Outstanding	1344	IRS	Internal Revenue Services	Pd end 09/21...	9/13/
Tax - 15	Outstanding	1345	IRS	Internal Revenue Services	Pd end 12/21...	9/13/
Tax - 12	Outstanding	1343	IRS	Internal Revenue Services	Pd end 06/29...	7/5/2
FUTA - 8	Outstanding	1036	IRS	Internal Revenue Services	Pd end 03/23...	3/31/
FUTA - 9	Outstanding	1338	IRS	Internal Revenue Services	Pd end 03/23...	3/29/
FUTA - 10	Outstanding	1339	IRS	Internal Revenue Services	Pd end 03/23...	3/29/
Tax - 11	Outstanding	1340	IRS	Internal Revenue Services	Pd end 03/23...	3/29/
Payroll - 6	Outstanding	1008	Barnfield	Mollie Barnfield	5000-<Invoic...	10/5/
Payroll - 5	Outstanding	1004	Barnfield	Mollie Barnfield	5000-<Invoic...	7/6/2
Payroll - 4	Outstanding	1005	Barnfield	Mollie Barnfield	5000-<Invoic...	4/6/2
New_Batch - 1	Outstanding	930	Beautiful	Beautiful Bouquets	New_InvoiceN...	6/16/

Total: 55 Selected: 1 Amount: 5,232.84 Balance: 1,132.00 Order: Date Hint: Enter a Lookup value to limit by Batch - Entry #, Merge #, Invoice #

AR Outstanding \$8,737.24

AR Over 90 Days 14 View →

Open Balance of Outstanding Invoice... 93%

Month-End Close 0 of 1 done Incomplete All

- ☐ Proof and merge all journal entries 893 / 0 Journal Entries →
- ☐ Clear unbalanced journal entries 20 / 0 Journal Entries →
- ☐ Fix AP invoices with invalid GL accounts 23 / 0 Invoices →
- ☐ Fix AR invoices with invalid GL accounts →

AP Invoices with Invalid GL Accounts 23 View →

AR Invoices Invalid GL Accounts 16 View →

Journal Entries

- Enter Journal Entry
- Proof Entries - 893 unmerged
- Merge Entries - 20 unbalanced

Payables

- Proof AP Invoices - 23 with invalid GL

GAIN KEY INSIGHTS-DRILLDOWN

Key Takeaways

Dashboards are evolving and better than ever!

- Data is easier to view than ever
- Dashboards are easier than ever to work with
- The Visual Financial Explorer is soon to be in your hands. More on this later with Marvin.



Thank You!

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