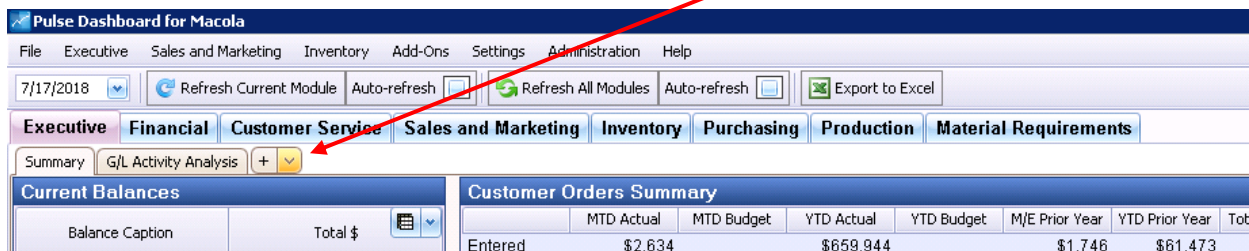


PULSE Dashboard & Reporting Software How to Add Default Pulse Dashboard Tabs to Existing Users

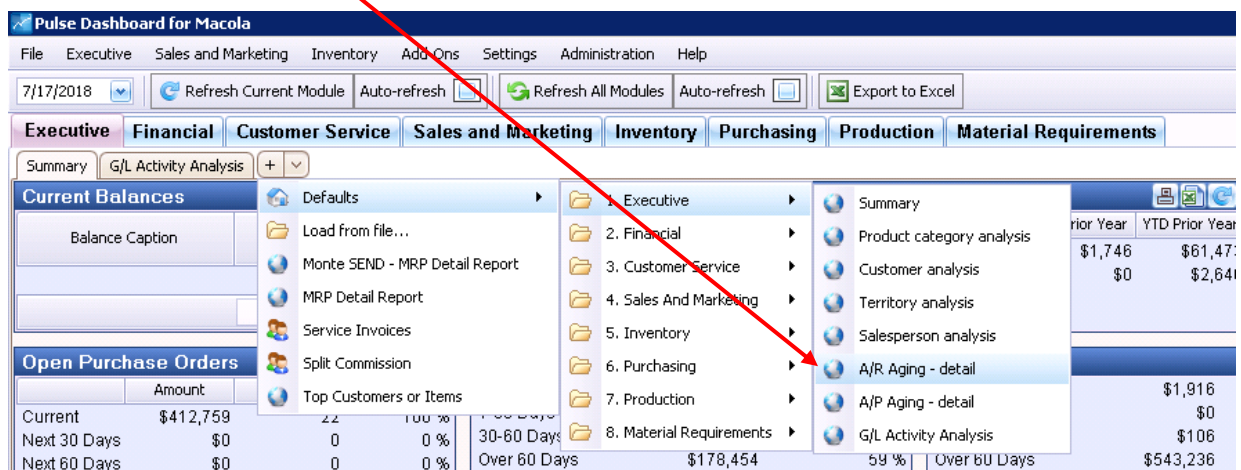
Over time as Pulse Dashboard is updated there are new features added to the software. At times we add additional report Tabs to the Default Settings. As we do this those Tabs are not automatically added to the screens of existing Users, but as new Users are added the new Tabs appear on the New User's screens. As existing Users see the new Tabs they would like to add these Tabs to their screens as well. There are a couple of ways that this can occur such as using the Save and Share or Publish method to move the Tabs from the New User to the Existing User screens but there is an additional way to do this also.

To add a new Default Tab to the screen of an Existing User there has been a new function added when adding a Share Tab to the screen. An option to add Defaults has been made available when adding a Shared Tab.

At the end of the existing Tabs in the module for the User select the Add Shared Tabs icon.



In this example, we will add the Executive Module A/R Aging – detail Tab to the screen of an Existing User by selecting the Defaults>1. Executive>A/R Aging – detail option.



New Tab as it appears on the screen.



(02/20)

Please call our PULSE support desk us with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

We encourage phone calls with suggestions for making our software function better for your organization. We also offer custom modifications, and if your suggestion is applicable to other users, it may be made at no charge.

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