

How to Setup Aging Periods on select reports

Several Reports in Pulse Dashboard have the ability to show columns summarized into Aging periods. Using the Setup icon (red wrench at the right side of the report header bar). Aging periods may be controlled to summarize information different than the standard monthly or "30/60/90" periods.

Setup Options – Open Customer Order Report

- Change the Presentation Mode from Summary to Detail

Box Caption: Open Customer Orders Detail

Split orders for each salesperson

Presentation Mode

Summary Details

Age By: Request Date

	Period Description	Bold Font Style	Start Date Base Type	Start Date Base Value	Start Date Offset Days	Start Date Preview	End Date Base Type	End Date Base Value	End Date Offset Days	End Date Preview
>	Period 1 Thru Today	<input type="checkbox"/>	None	0	0		Day	0	0	11/15/2019
	Period 2 Tomorrow thru M/E	<input type="checkbox"/>	Day	1	0	11/16/2019	Period End	0	0	11/30/2019
	Period 3 Subtotal M/E	<input checked="" type="checkbox"/>	None	0	0		Period End	0	0	11/30/2019
	Period 4 Next 30 Days	<input type="checkbox"/>	Period End	0	1	12/1/2019	Period End	0	30	12/30/2019
	Period 5 Next 60 Days	<input type="checkbox"/>	Period End	0	31	12/31/2019	Period End	0	60	1/29/2020
	Period 6 Over 60 Days	<input type="checkbox"/>	Period End	0	61	1/30/2020	None	0	0	
	Period 7 Subtotal Future	<input checked="" type="checkbox"/>	Period End	1	1	12/1/2019	None	0	0	

Aging Period 1 of 7

Move Up Move Down

OK Cancel Save and Share...

- Re-order the lines
- Add additional periods
- Change the name of the Periods
- Determine and control the beginning and end of periods (hint – watch the Dates when changing the Offset Days)

Defining periods of time may take some experimentation to get the period to not overlap or to account for all days because of gaps left between periods. As a suggestion make a copy of the report that you want to change and use it as a test area to get the periods to be accurate. Another tip is to make sure that the Start Date Preview and End Date Preview dates above are what they should be.

If assistance is needed please contact Pulse Support.

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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Developer of Pulse Dashboard software