



Snapshot Getting Started Training

Although this training refers to Snapshot for Accounting, this manual can also be used if upskilling for the Snapshot for Payroll version.

Plus Software has been shortened to Plus within this training manual

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Introduction

Snapshot is a Dashboard and analytics reporting platform made specifically for mid-market ERP accounting and payroll solutions.

Its purpose is simple - to give customers the right **real time information about any area of their business to help make informed decisions.**

This Getting Started Snapshot training manual will give you all the tools need to understand and confidently use Snapshot from Plus Software.

A Getting Started Customising Dashboards training manual is also available should you wish to change the layout, appearance, or add in more Dashboard items like charts etc. See the Plus Software Solutions website (below) for more information.

IMPORTANT

Please review the Frequently Asked Questions (FAQ) either on www.snapshotbi.com

Initial Administration

This training assumes that the Snapshot has been installed, **and linked** to the Accounting and/or Payroll business system.

As a reminder, you will have clicked on Check for new dashboards (under Settings) immediately after your installation and connection to your database, to ensure the latest Dashboards are available.



Oh, and if you have not installed Snapshot at this time, then download here:
www.snapshotbi.com

Logging on

When logging onto Snapshot for the first time you will need to enter your Username and Password:



The Username and Password shipped with the install file is:

Username admin
Password reportingadmin

We recommend you change your password as soon as possible.

IMPORTANT:

Please also save your Customer Name and Serial Number as this will be needed in the future.

See under "Setting/General" within this manual for how to unlock the software. This will display the Customer Name and Serial Number.

Adding Roles, Users and Permissions

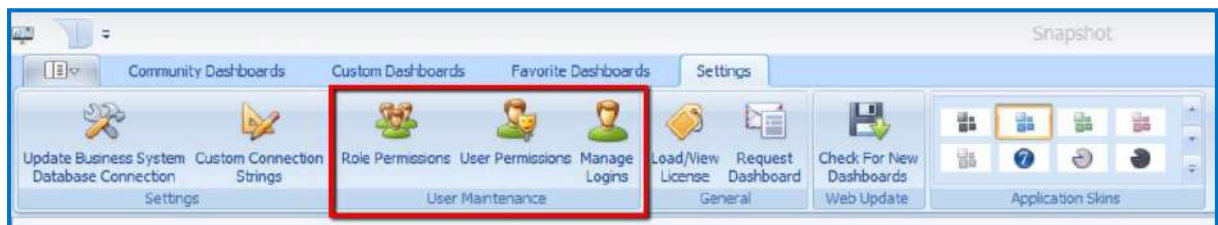
To start using Snapshot, start with adding a Role and a User (or users depending on the number of licenses purchased).

You will need to decide on Permissions for those Roles and Users too.

Note:

You don't always have to add Roles – you can simply add Users and Permissions, depending on your business needs.

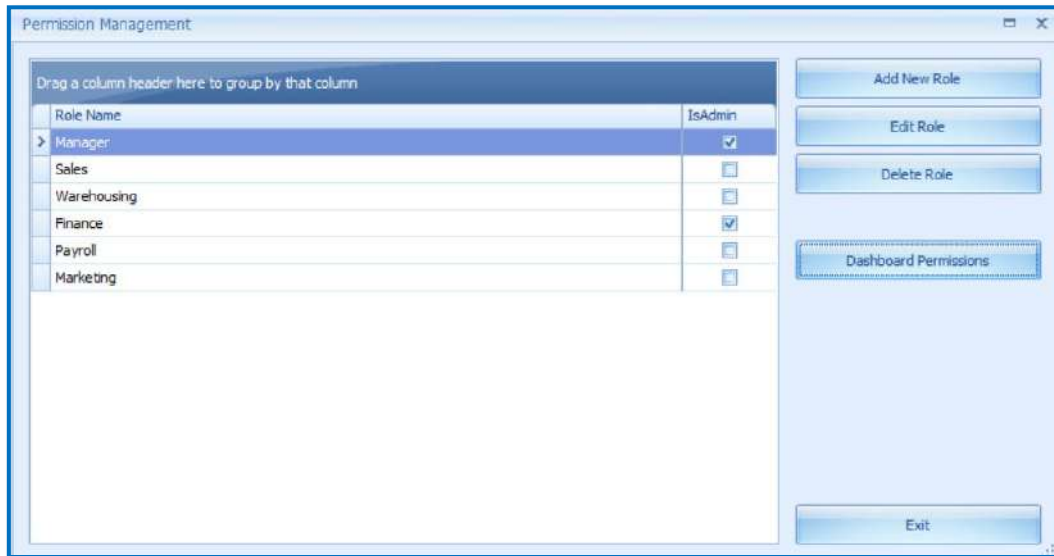
To add roles, users and permissions, click one of the options under User Maintenance, under Settings.



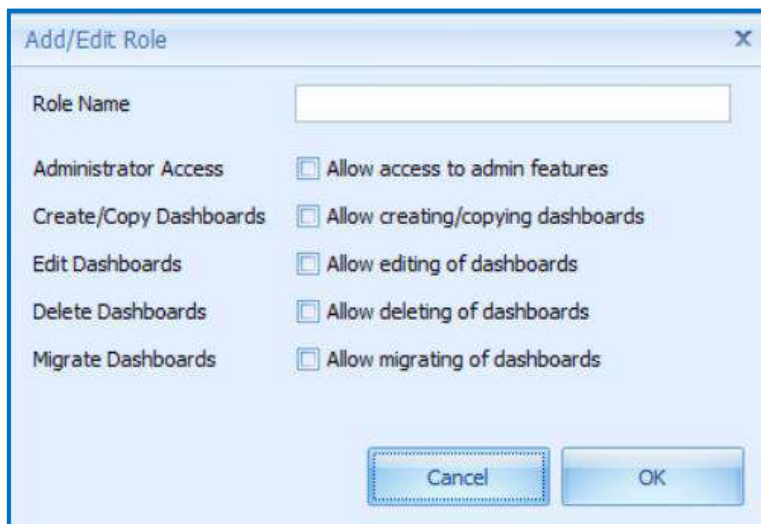
Let's look at each one individually.

Adding Roles

To add a Role, decide on the different functions within your business and what access you want to give that particular Role. Here are some examples of some roles below:



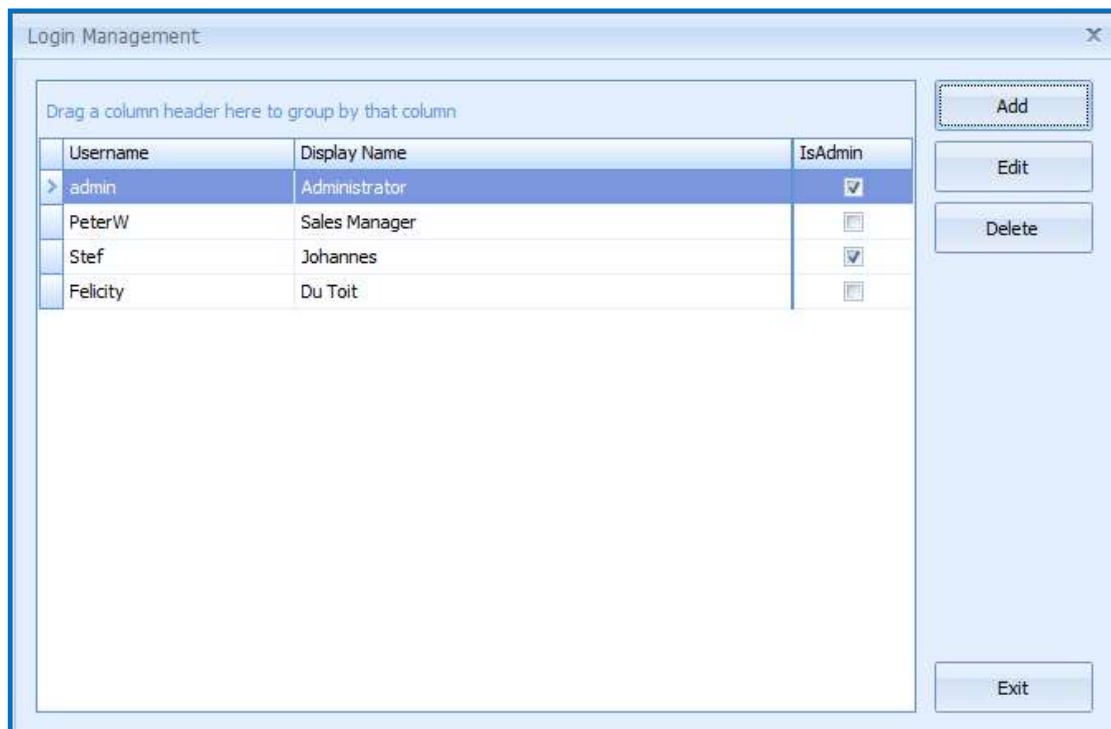
To add a role, click on Add New Role. Tick the permissions you wish to associate with that Role:



Adding Users (Manage Logins)

Once the Role are set up, you can now add Users.

Clicking on the **Manage Logins**, will allow you to add individual users and passwords, depending on their licence:



To add users, simply click on Add and the following screen will be displayed:

Parameter Name	Parameter Value
----------------	-----------------

Enter in the relevant **Username** and **Password**.

Note:

You can use the same username and password the user has for the Accounting and or Payroll System.

Add in the role (See previous section for an explanation of Roles) and tick any of the functionality for that User and Role. You can allow them to create and copy dashboards, edit and even migrate.

IMPORTANT:

Ticking the box to provide Administrator Access will give the user access to all Dashboards.

Further, the user will be able to change the Business System Settings, access the **Manage Logins** and **Manage Permissions** screens as well as check for new Dashboards.

Once a user has been added, no Dashboards will be visible to the new user.

This can be configured under the **Manage Permissions** area.

This screen also has the option to add **Custom Parameters**.

Parameter Name	Parameter Value

This is used when there is a need to customise (for example) a sales Dashboard where the same Dashboard is used by both the Sales Manager and the individual Sales Rep.

You may want the Sales Rep to see **only** his/her own sales information like customers and revenue.

Custom Parameters are used here to hide certain information.

Your Partner or Plus Software offers this customisation. If you need Plus Software to assist, email support@plussoftsolutions.com with the Dashboard name and your requirements.

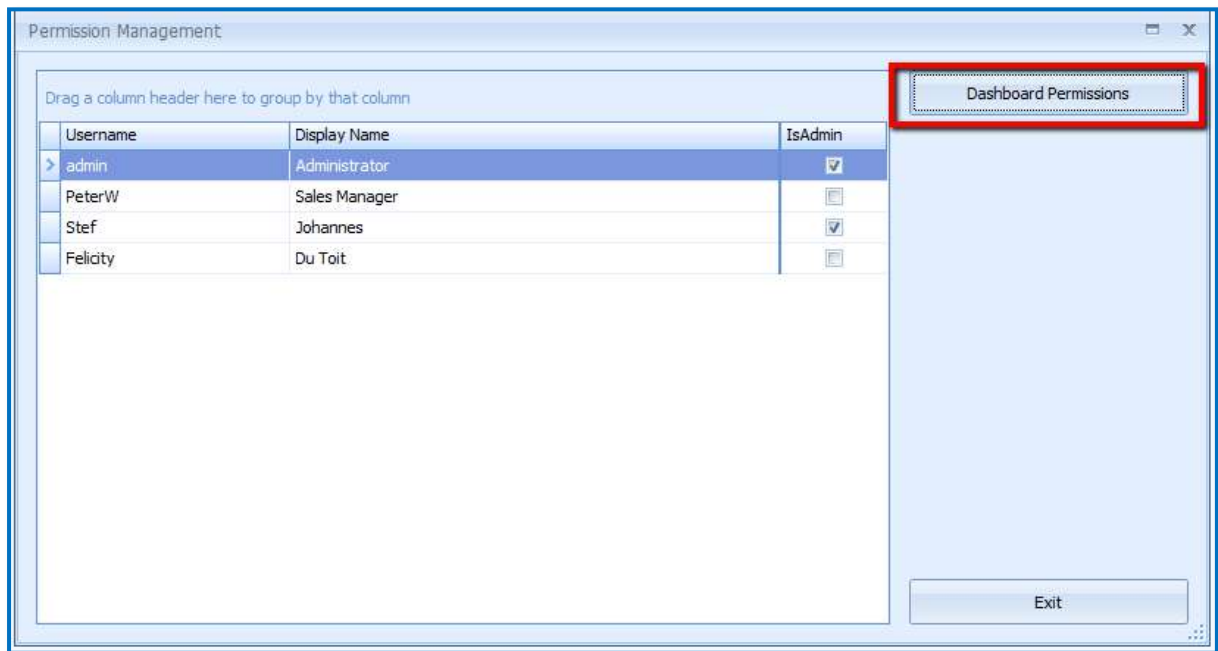
Note:

Not all Dashboards can be use Custom Parameters.

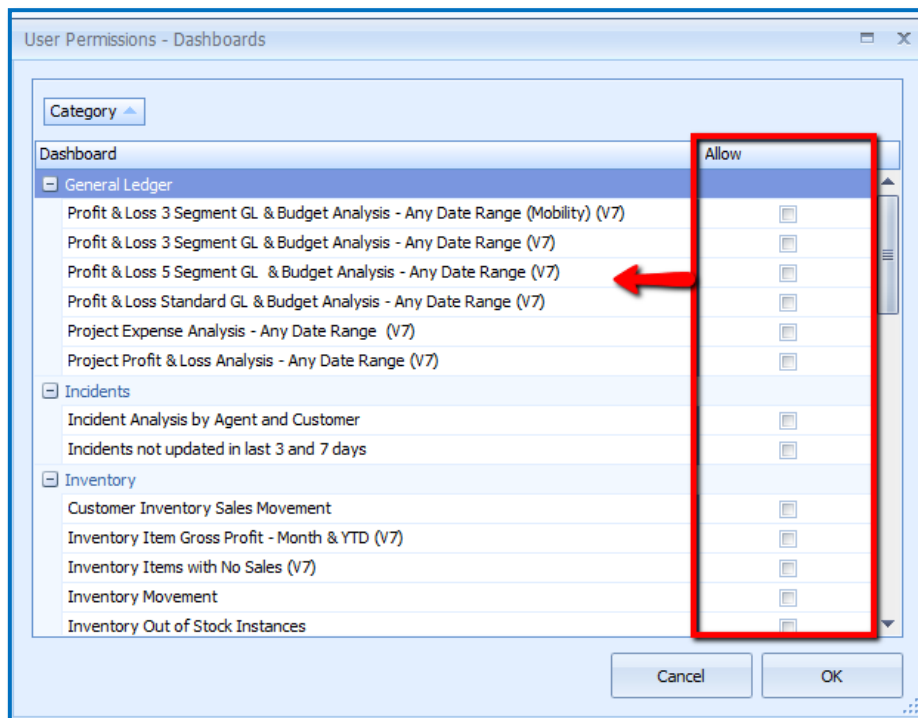
In some cases, a Custom Dashboard is required. See Customer Dashboards section for more information.

Adding Permissions

Click on the individual's name and then **Dashboard Permissions**.

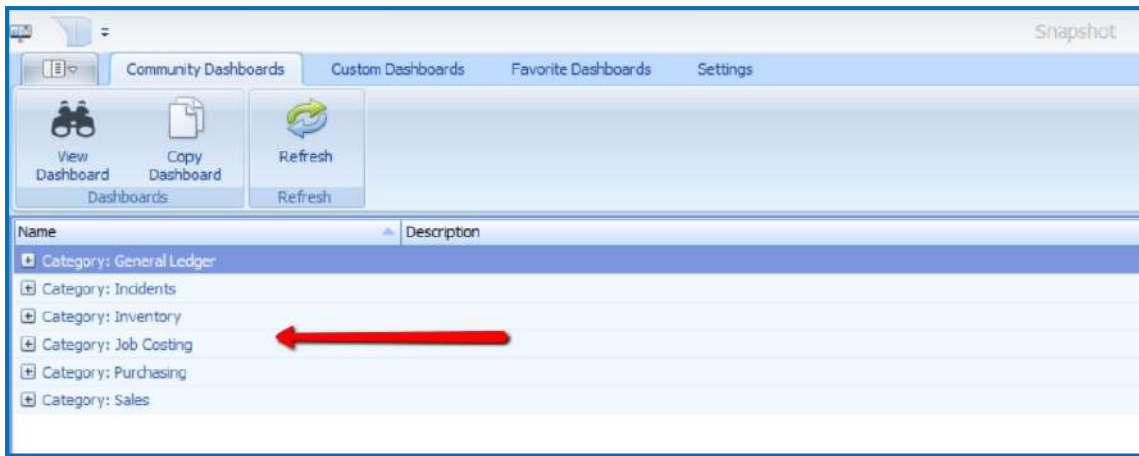


Tick the Dashboards under the **Allow** column that you want that user to view:

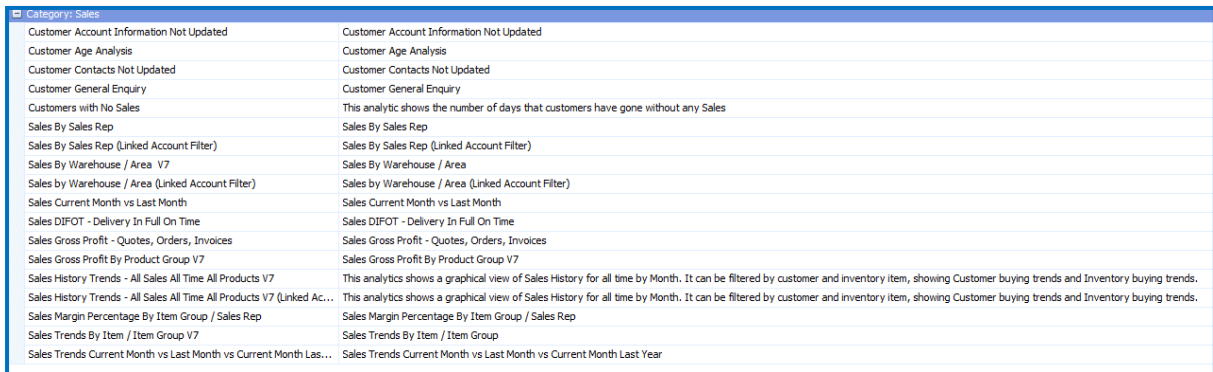


Viewing and Opening your first Dashboard

The quickest way to see the power of Snapshot is to view a Dashboard from a preferred category:



For most companies a sales Dashboard is the best and quickest way to understand Snapshot from the many options available, under the Sales category:

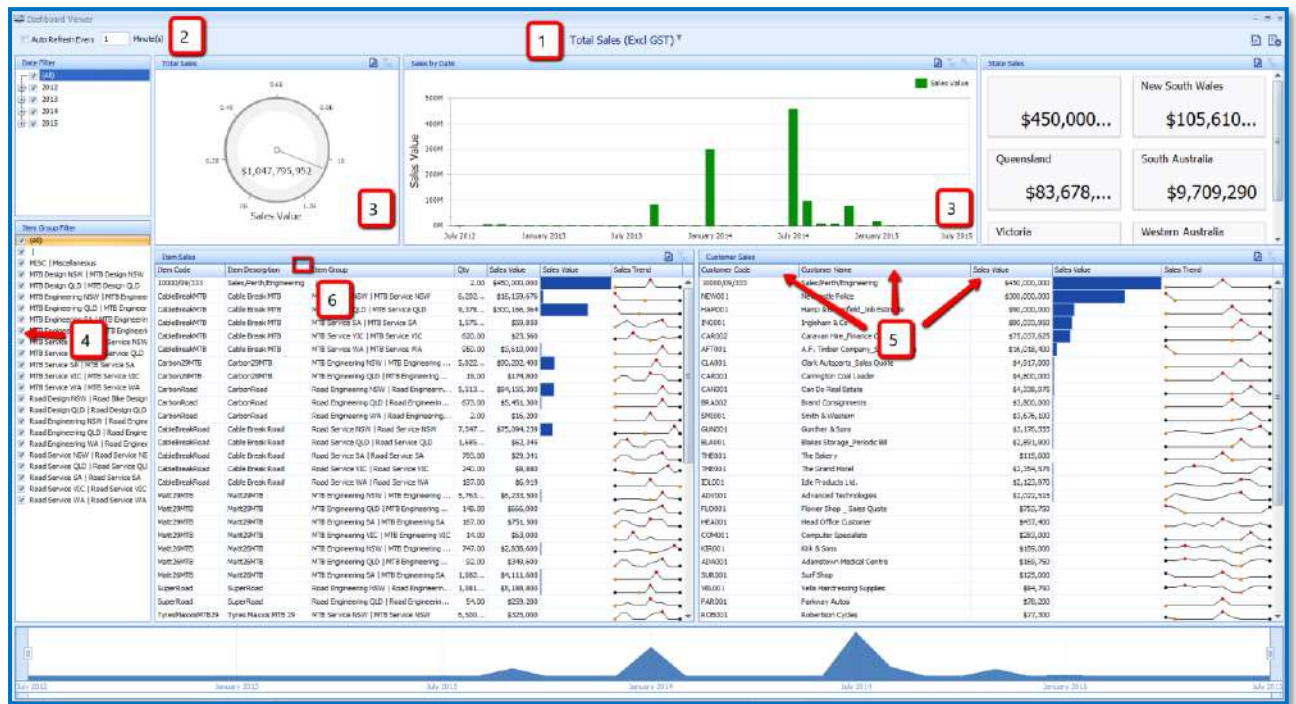


Common aspects of every Dashboard

Let's look at the common aspects of every Dashboard.

One particular Dashboard customers love is **Total Sales, All Time**, a Dashboard included with most accounting vendors.

Your Dashboard will look like this, or be similar:

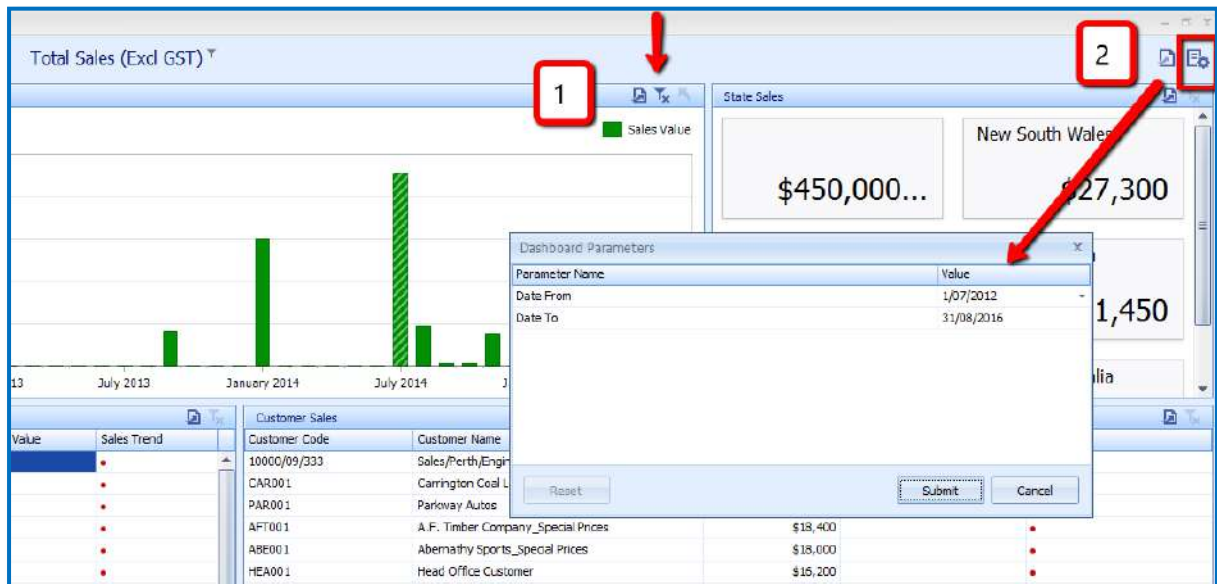


There are some common components to any Dashboard, numbered from 1 to 6 in the image above:

1. Dashboard name;
2. How often the customer wants this Dashboard to “call” data from the financial system;
3. Dashboard components – different Dashboards offer different views;
4. Dynamic – clicking on line items or removing tick boxes allows the Dashboard to change views;
5. Column Sort – clicking here will sort the individual column;
6. Column Customisation – further filtering options.

Common aspects of every Dashboard (continued)

1. Drill back up;
2. Changing Parameters.



When changing a Dashboard view, you can revert to the **original** Dashboard by clicking on the icon, # 1 in the image above.

Some Dashboards allow you to change parameters on the fly by clicking on this icon at the top right, #2 in the image above.

The 'Dashboard Parameters' dialog box is shown with the following data:

Parameter Name	Value
Date From	1/01/2009
Date To	31/08/2016

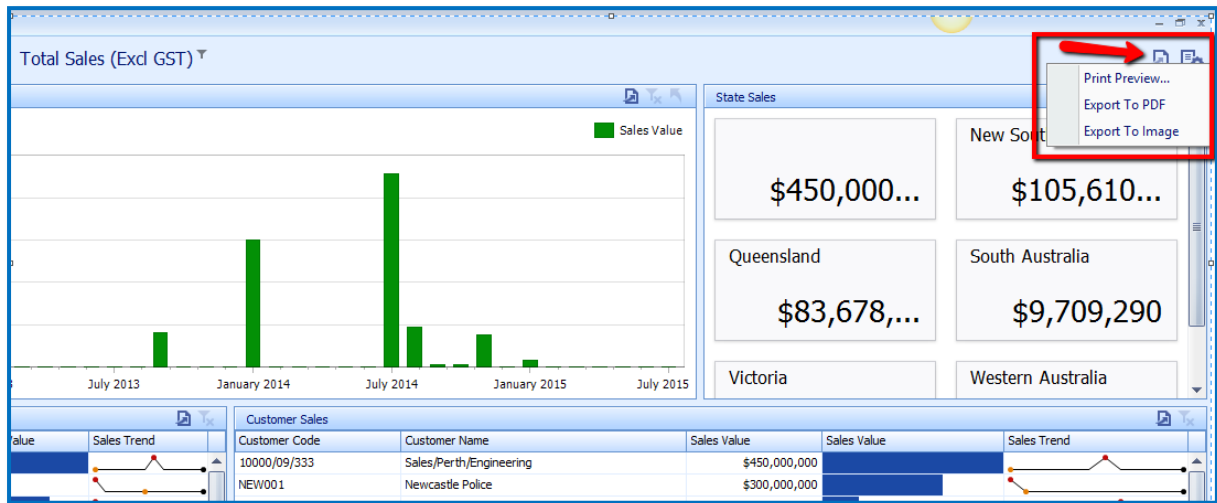
Note

Parameter options vary from Dashboard to Dashboard so a Parameter option may not always be available. You can add a Parameter to any Dashboard -see the Getting Started Customising Dashboards manual.

Common aspects of every Dashboard (continued)

Printing and Sharing

To print or share the entire Dashboard, click icon on top right:



To print or share individual tables, click on the icon above the table component:

The screenshot shows a table titled 'Customer Sales' with columns for Customer Code, Customer Name, Sales Value, and Sales Trend. A red arrow points to a menu above the table with the following options:

- Print Preview...
- Export To PDF
- Export To Image
- Export To Excel

Customer Code	Customer Name	Sales Value	Sales Trend
10000/09/333	Sales/Perth/Engineering	\$450,000,000	
NEW001	Newcastle Police	\$300,000,000	
HAM001	Hamp & Bloomfield_Job Estimate	\$90,000,000	
ING001	Ingleham & Co	\$80,033,950	
CAR002	Caravan Hire_Finance Charges	\$75,037,625	
AFT001	A.F. Timber Company_Special Prices	\$16,018,400	
CLA001	Clark Autoparts_Sales Quote	\$4,917,000	
CAR001	Carrington Coal Loader	\$4,800,000	
CAN001	Can Do Real Estate	\$4,338,075	
BRA002	Brand Consignments	\$3,800,000	
SMI001	Smith & Western	\$3,676,100	
GUN001	Gunther & Sons	\$3,176,555	
BLA001	Blakes Storage_Periodic Bill	\$2,891,900	
THE001	The Bakery	\$115,600	

Options for Print Preview

Export to:

The screenshot shows a 'Preview' window with a toolbar. The 'Export To' button is highlighted, and its dropdown menu is open. The menu options are:

- PDF File (Adobe Portable Document Format)
- XLS File (Microsoft Excel 2000-2003 Workbook)
- XLSX File (Microsoft Excel 2007 Workbook)
- Image File (BMP, GIF, JPEG, PNG, TIFF, EMF, WMF)

The background shows a table titled 'Item Sales' with columns for Item Code, Item Description, Item Group, Qty, Sales Va..., and Sales Value. A red arrow points from the 'Export To' button to the menu.

Item Code	Item Description	Item Group	Qty	Sales Va...	Sales Value
10000/09/333	Sales/Perth/Engin...		2.00	\$450,00...	
CableBreakMTB	Cable Break MTB	MTB Service NSW MTB Service...	6,20...	\$16,159...	
CableBreakMTB	Cable Break MTB	MTB Service QLD MTB Service Q...	9,37...	\$300,16...	
CableBreakMTB	Cable Break MTB	MTB Service SA MTB Service SA	1,57...	\$59,850	
CableBreakMTB	Cable Break MTB	MTB Service VIC MTB Service VIC	620...	\$23,560	
CableBreakMTB	Cable Break MTB	MTB Service WA MTB Service WA	950...	\$3,610,...	
Carbon29MTB	Carbon29MTB	MTB Engineering NSW MTB Engi...	5,02...	\$90,202...	
Carbon29MTB	Carbon29MTB	MTB Engineering QLD MTB Engi...	19.00	\$174,800	
CarbonRoad	CarbonRoad	Road Engineering NSW Road En...	5,51...	\$84,155...	
CarbonRoad	CarbonRoad	Road Engineering QLD Road En...	673...	\$5,451,...	
CarbonRoad	CarbonRoad	Road Engineering WA Road Engi...	2.00	\$16,200	

Email As:

The screenshot shows the same 'Preview' window as above, but with the 'E-Mail As' button highlighted in the toolbar. The 'E-Mail As' dropdown menu is open, showing the same options as the 'Export To' menu:

- PDF File (Adobe Portable Document Format)
- XLS File (Microsoft Excel 2000-2003 Workbook)
- XLSX File (Microsoft Excel 2007 Workbook)
- Image File (BMP, GIF, JPEG, PNG, TIFF, EMF, WMF)

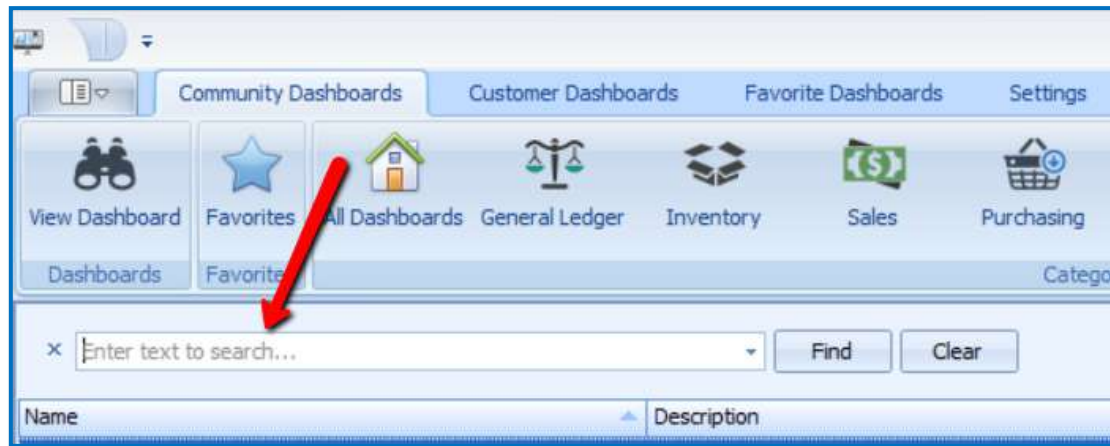
The background shows the same 'Item Sales' table as in the previous screenshot.

Item Code	Item Description	Item Group	Qty	Sales Va...	Sales Value
10000/09/333	Sales/Perth/Engin...		2.00	\$450,00...	
CableBreakMTB	Cable Break MTB	MTB Service NSW MTB Service...	6,20...	\$16,159...	
CableBreakMTB	Cable Break MTB	MTB Service QLD MTB Service Q...	9,37...	\$300,16...	
CableBreakMTB	Cable Break MTB	MTB Service SA MTB Service SA	1,57...	\$59,850	
CableBreakMTB	Cable Break MTB	MTB Service VIC MTB Service VIC	620...	\$23,560	
CableBreakMTB	Cable Break MTB	MTB Service WA MTB Service WA	950...	\$3,610,...	
Carbon29MTB	Carbon29MTB	MTB Engineering NSW MTB Engi...	5,02...	\$90,202...	
Carbon29MTB	Carbon29MTB	MTB Engineering QLD MTB Engi...	19.00	\$174,800	
CarbonRoad	CarbonRoad	Road Engineering NSW Road En...	5,51...	\$84,155...	
CarbonRoad	CarbonRoad	Road Engineering QLD Road En...	673...	\$5,451,...	
CarbonRoad	CarbonRoad	Road Engineering WA Road Engi...	2.00	\$16,200	
CableBreakRoad	Cable Break Road	Road Service NSW Road Service...	7,54...	\$75,094...	
CableBreakRoad	Cable Break Road	Road Service QLD Road Service...	1,68...	\$62,345	

Searching for Dashboards

To find a dashboard, hit CTRL + F

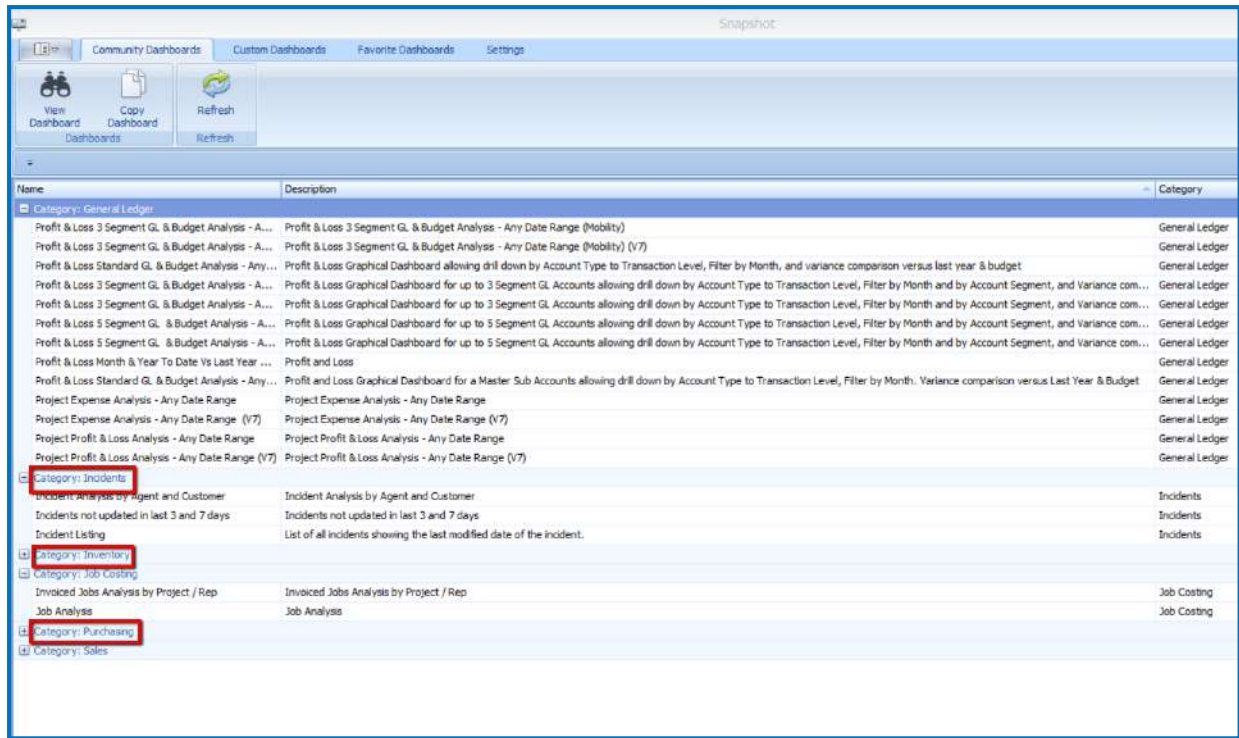
Enter the name of a Dashboard. Easy!



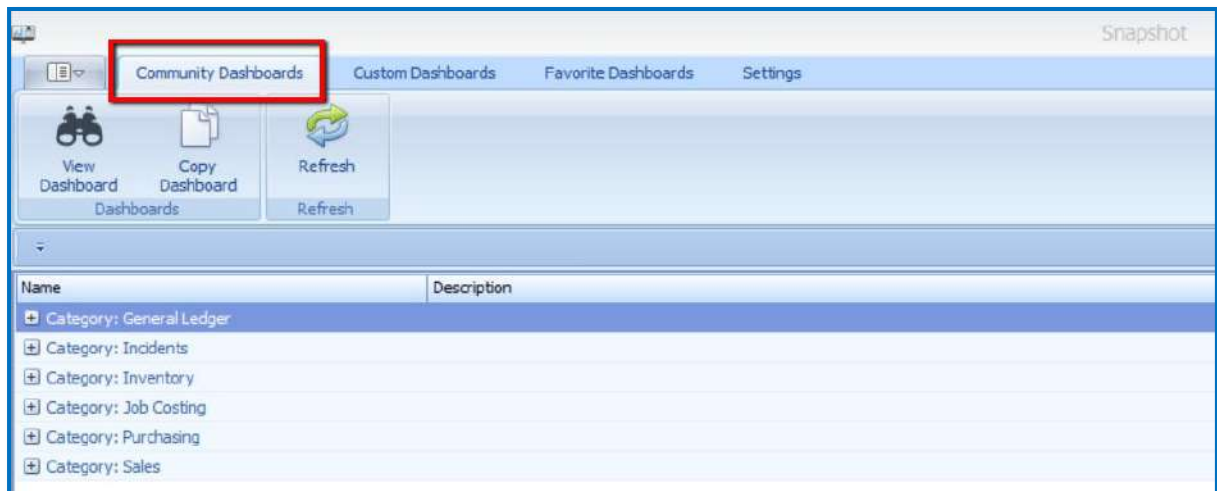
Dashboards in other categories

After viewing your first Dashboard, you can view as many Dashboards as you like to see which are **the most useful** for your business.

Open up each category (General Ledger, Incidents, Inventory etc.) to see which Dashboards are available for your Business System, upon install:



Community Dashboards



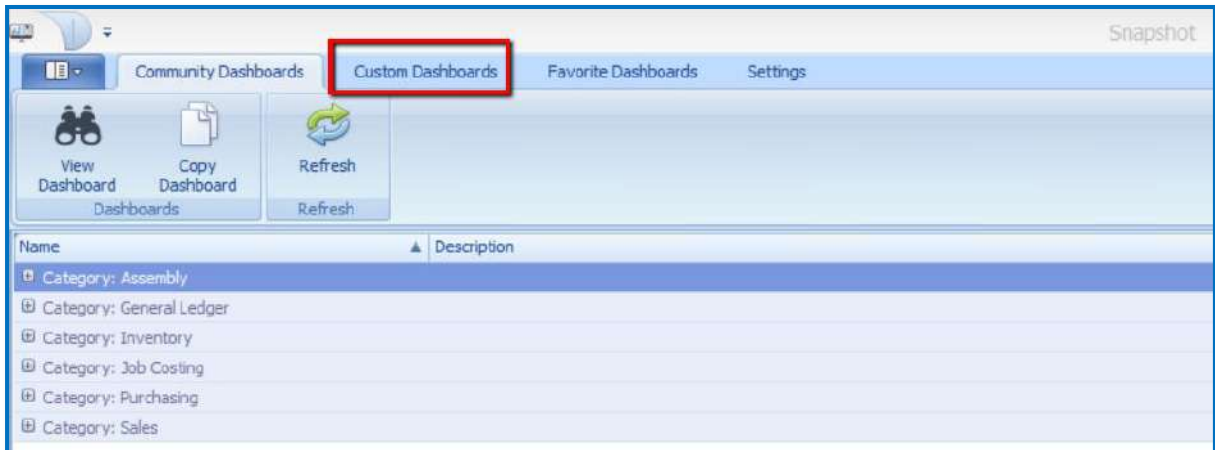
The Community Dashboard menu item is where all new Dashboards are available (and updated) for the Community of Snapshot users, worldwide.

To explain further, every user of Snapshot has access to these Dashboards (depending on permissions), as opposed to the Dashboards under the Custom Dashboard menu item. These Dashboards are only available to that particular business.

When Dashboard requests are sent through by Partners and or Customers (or when Plus Software designs a new Dashboard) a decision is made as to whether the requested Dashboard could be designed **for the Community** or whether this would be a Custom Dashboard.

Our general preference at Plus is to develop Dashboards **for the Community** so everyone benefits.

Custom Dashboards

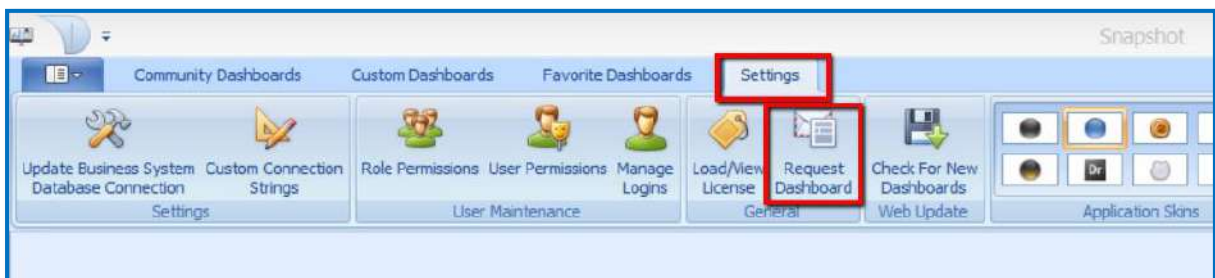


There are occasions when a very specific Dashboard is required that suits a particular customer.

This is called a Custom Dashboard.

With Snapshot version 1, Customers had to ask Plus Software to create a specific Dashboard.

With Snapshot version 2, Customers are now able to ask their Partner or if the Partner is unable, then click Settings, General, and Request Dashboard:



Once the requirements are understood, there may be an additional cost for a Custom Dashboard.

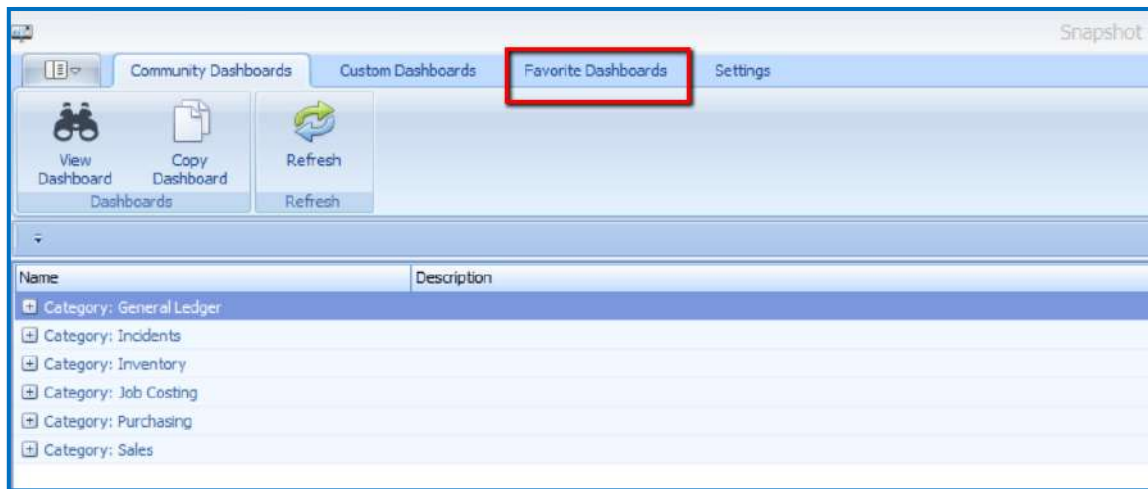
When Custom Dashboards are complete, the customer is notified and to install, they would click on **Settings**, then **Check for New Dashboards**, and the Dashboard will be displayed within the Customer Dashboard section, within a few minutes.

Note:

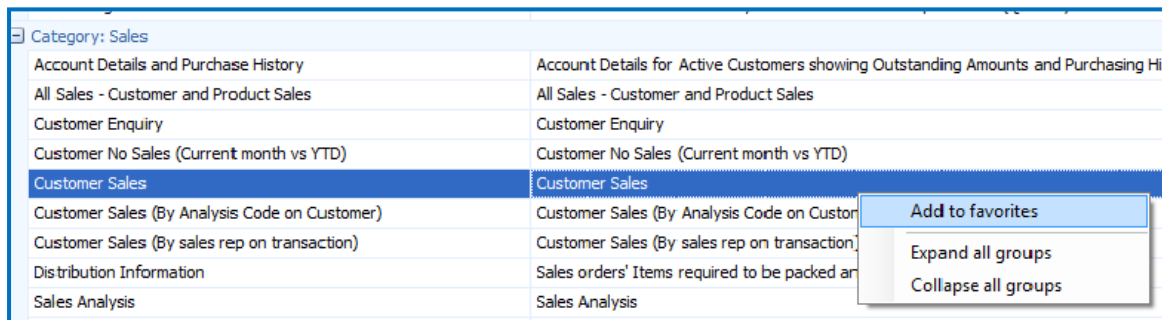
The Dashboard, once downloaded, will automatically analyse and collect the information from the Business System and populate the new Customer Dashboard instantly.

Favourite Dashboards

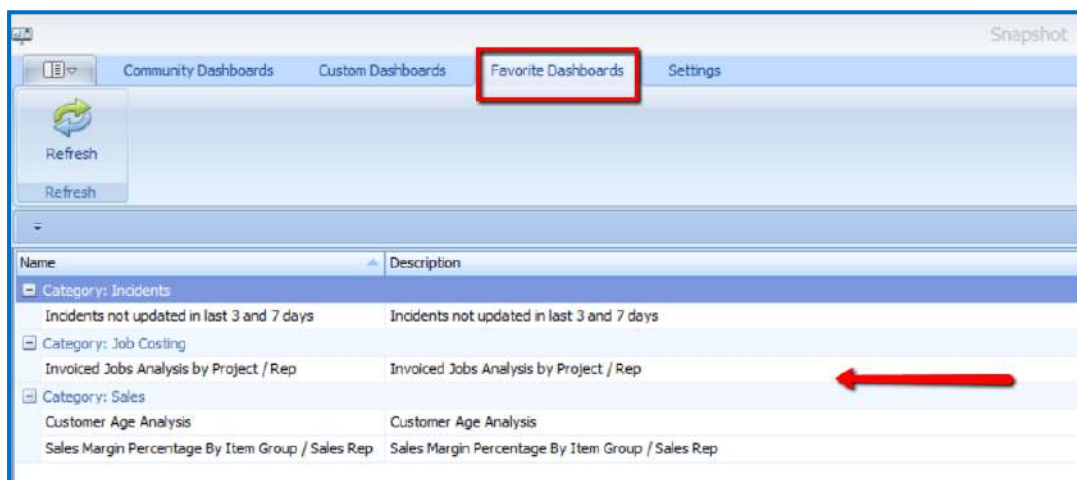
You can save any Dashboard to your own list, called Favourite Dashboards.



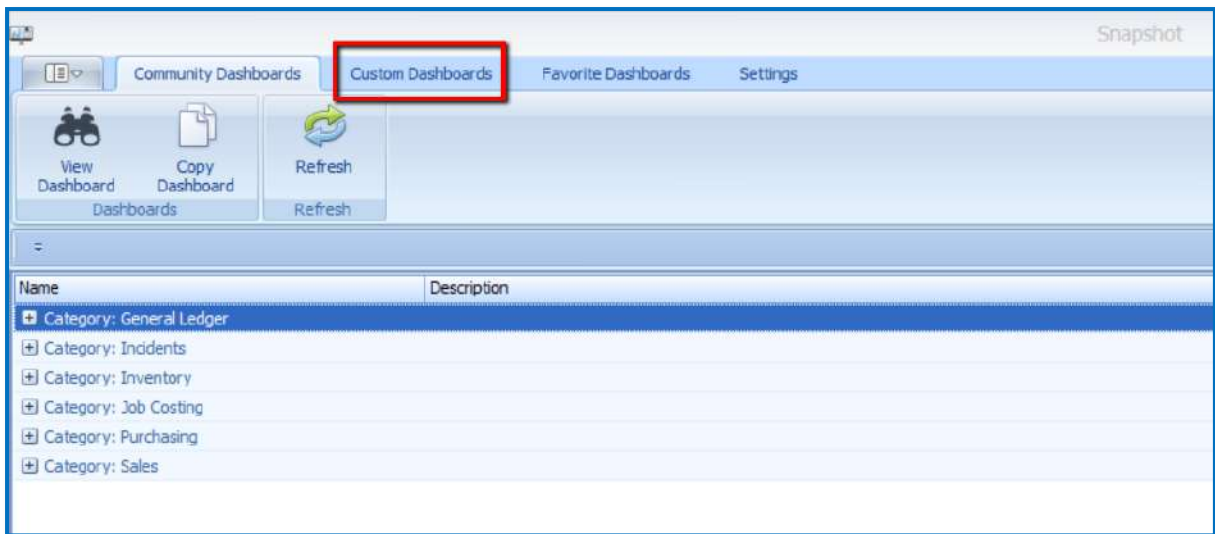
To save to Favourites, click on the Dashboard name, and then right click:



These will now be displayed thereafter under **Customer Favourites**. To remove, simply right click again.



Customising a Dashboard's Layout and Appearance

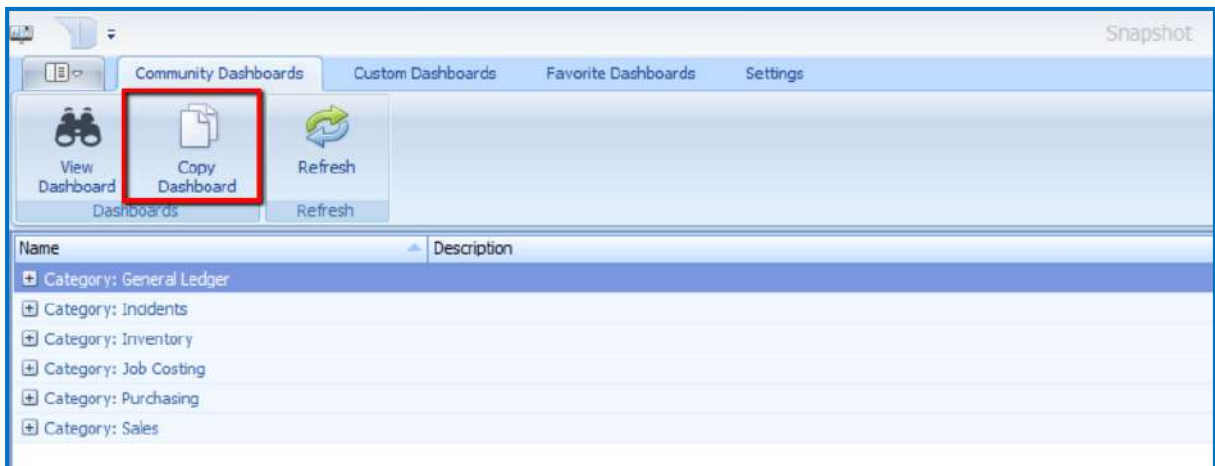


There are occasions when you may want to customise your Dashboard further.

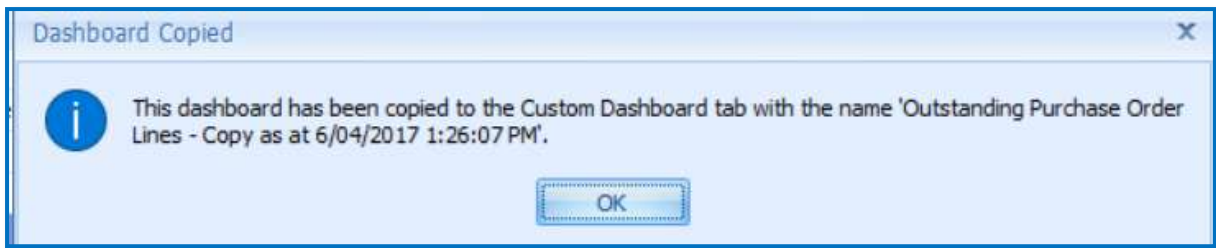
You may want to change the layout, or add in a different pie chart or graph, change existing grids etc.– there are a number of options available to you.

This is easy to do – simply choose a Dashboard you wish to customise from the Community Section

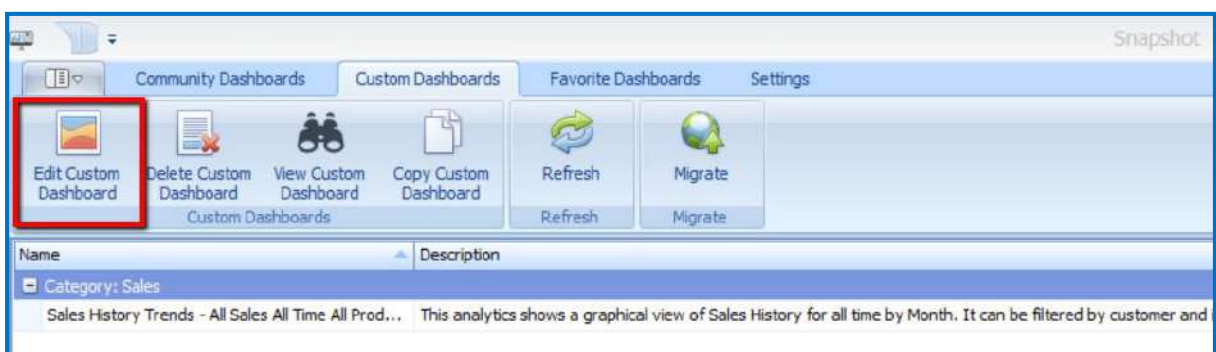
Then hit Copy



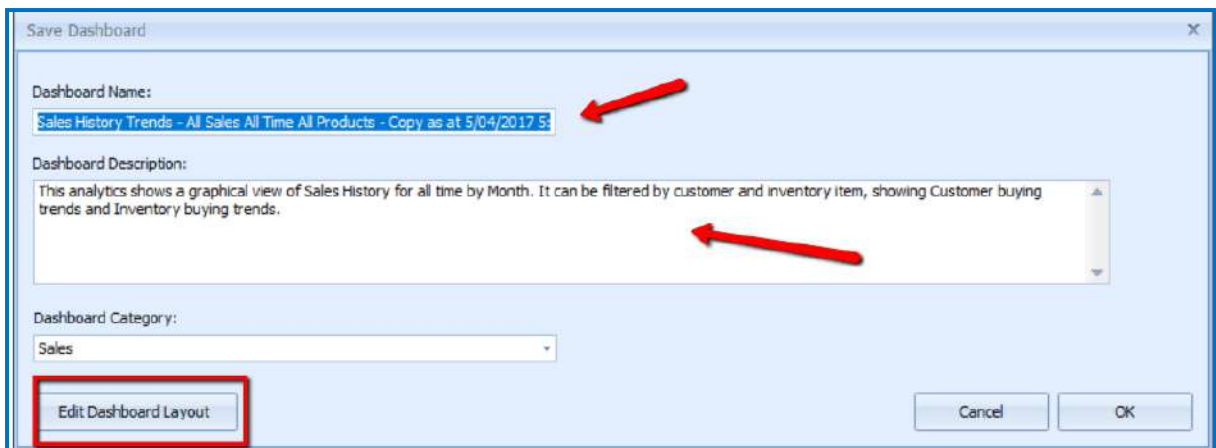
This brings up the following text box:



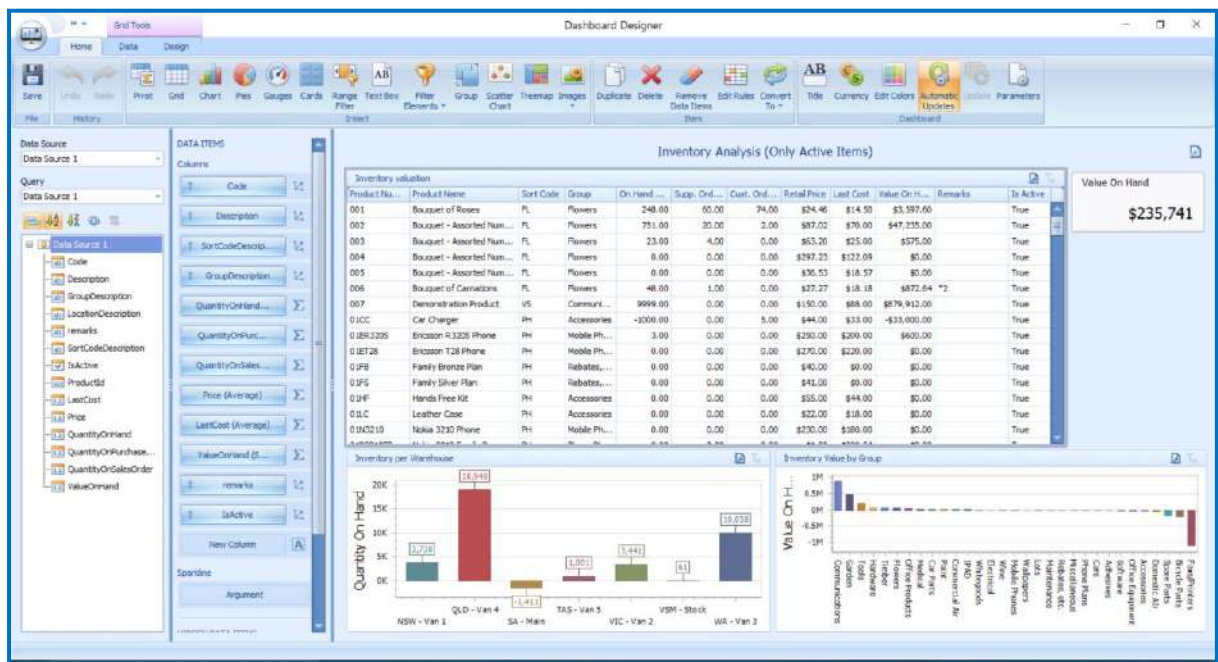
Navigate to the Dashboard you copied under Custom Dashboards and click on Edit Custom Dashboard:



Now change the name of the Snapshot, add a description and click on Edit Dashboard Layout:



This opens up the Snapshot Dashboard Designer.



For more detailed information on Customising the Layout and Appearance of a Snapshot Dashboard, please see our Getting Started Customising Dashboards manual. Either download from the Plus Software website or send an email to info@plussoftsolutions.com to receive a copy.

We use Dev Express tools to help you customise your Dashboard.

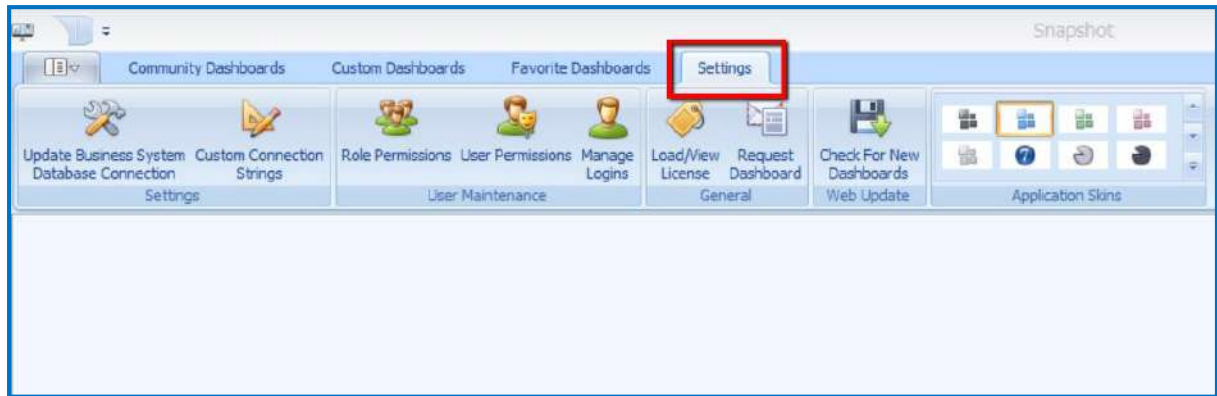
Note:

If you're not comfortable customising a particular Dashboard yourself, please ask your Partner or Plus Software to provide this functionality.

Partners also have the ability to write new Dashboards from the ground up and to add new data sources from other SQL solutions. Please enquire with your Partner.

Settings

There are a number options under Settings.



These options are grouped by:

Settings

- Update Business System Database Connection
- Custom Connection Strings

User Maintenance

- Role Permissions
- User Permissions
- Manage Logins

General

- Load/View Licence
- Request Dashboard

Web Update

- Check for New Dashboards

Application Skins

Settings

Update Business System Database Connection



By clicking on the Update Business System Database Connection, you're able to change the back end accounting or payroll system. Please see the installation guide for more information.

A screenshot of the 'Settings' dialog box. The dialog has a title bar with 'Settings' and a close button. It is divided into several sections. The first section is 'Business System Selection' with radio buttons for 'Sybiz Vision', 'Sage Pastel Partner', 'Sage Pastel Evolution' (selected), 'Ostendo', 'Sybiz Visipay', and 'Advanced Business Manager'. The second section is 'Sybiz Vision & Sage Pastel Evolution Database Settings (MSSQL Server)' with fields for 'SQL Server Address' (DELLWORKLAPTOP\SQLEXPRESS), 'SQL Username' (sa), 'SQL Password' (masked), and 'Database Name' (CashManEvo). It also has radio buttons for 'Windows Authentication' and 'SQL Authentication' (selected). The third section is 'Ostendo Database Settings (Firebird)' with fields for 'Firebird Server Address' (DELLWORKLAPTOP) and 'Firebird Database Path' (C:\Program Files (x86)\Ostendo\...). The fourth section is 'Sage Pastel Partner Database Settings (Pervasive)' with empty fields for 'Pervasive Server Address', 'Pervasive Username', 'Pervasive Password', and 'Database Name'. At the bottom, there is a note: 'Clicking 'Save and Close' will apply these settings to the database, and will apply to all users.' and two buttons: 'Cancel' and 'Save and Close'.

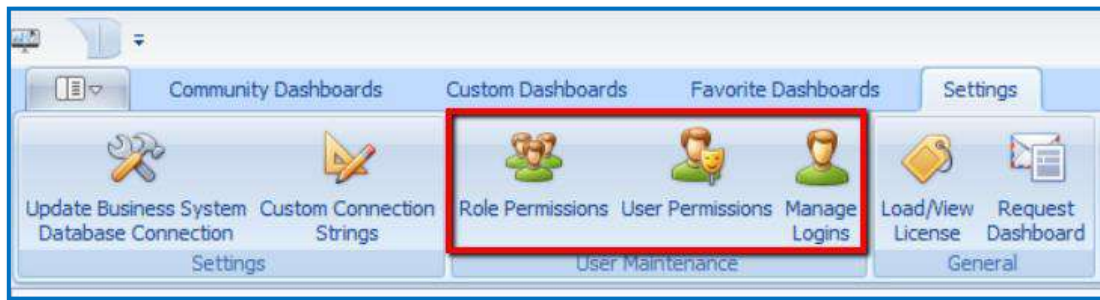
Custom Connection Strings



This is a back end function to allow Plus Software to connect different company databases on different SQL servers / instances, providing they are on the network and accessible.

If this is required, please contact Plus who will advise.

User Maintenance



Role Permissions

User Permissions

Manage Logins

This has been covered off in the **beginning** of this training manual as these are the first steps to using Snapshot.

General



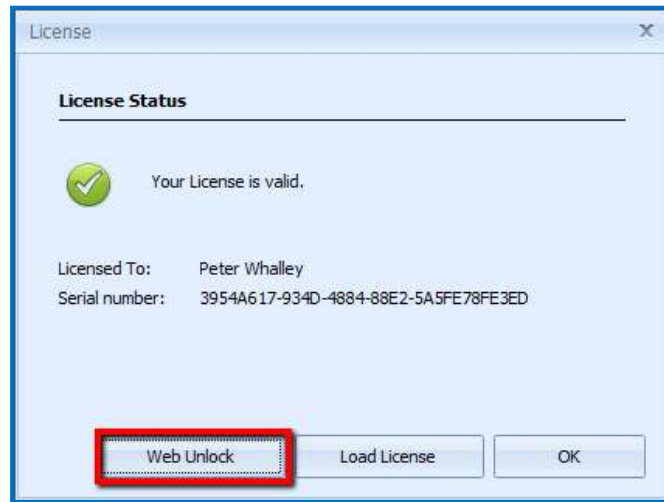
Load/View Licence

Users can load new licenses or request new Dashboards.

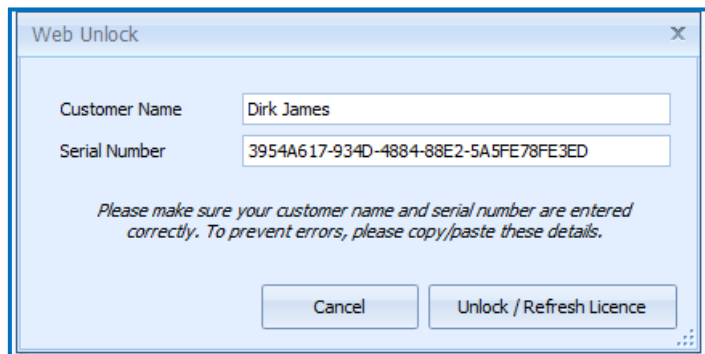
To Load/View Licence, when clicking on the icon you are given two options:

1. Web Unlock
2. Load Licence

1 Web Unlock

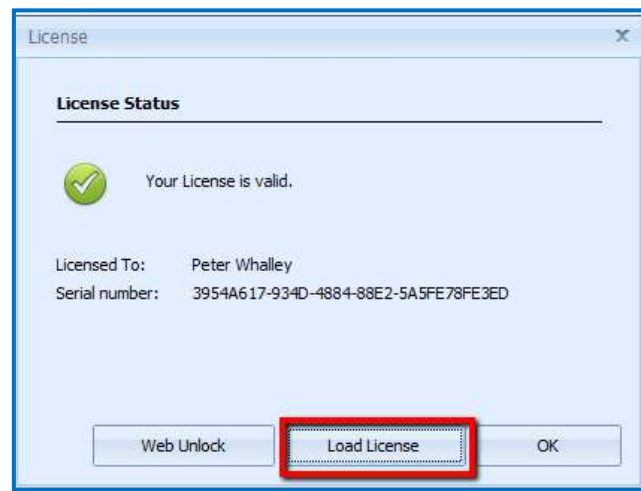


When clicking on Web Unlock, a new screen will open

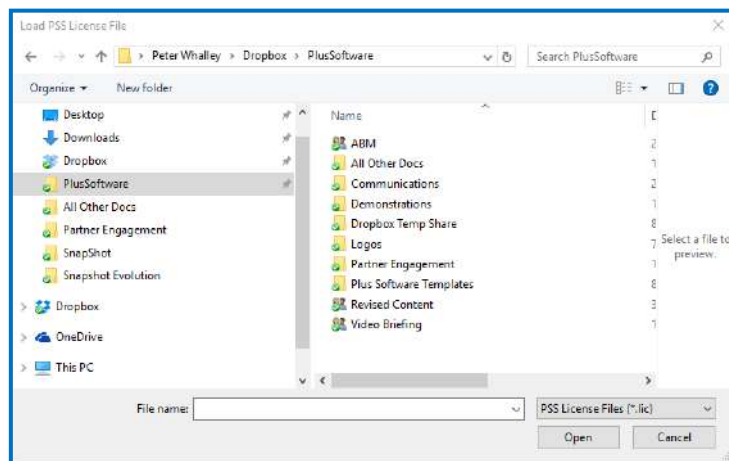


The customer name and Serial number should be automatically loaded. However, if this is not the case, then copy this information EXACTLY as it appears in the email or website to Web Unlock as directed.

2 Load Licence

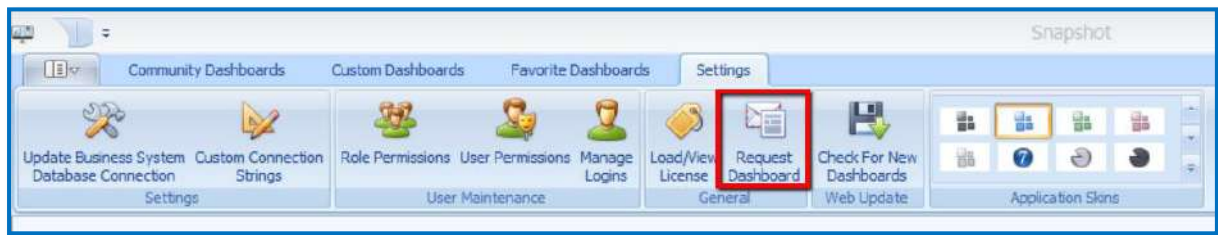


If you have been emailed a licence then save this licence file to a folder on your PC.



Then click on Load Licence and open the file name to unlock.

Request Dashboard



Customer and Partners are able to request Dashboard directly from within the software by clicking on the Request Dashboard icon. The following screen will open:

A dialog box titled 'Request Dashboard' with a close button (X) in the top right corner. The text inside reads: 'This form can be used to request a dashboard if it is not currently available. Your business partner will be notified of this request, and you will be contacted for further information'. Below the text are five input fields: 'Contact Name', 'Contact Phone Number', 'Contact Email', 'Suggested Dashboard Title', and 'Additional Details' (a larger text area). At the bottom right, there are two buttons: 'Cancel' and 'Send Request'.

Fill in the details, providing as much information as possible and click Send Request.

Plus will review and determine the requirements for either a Community or Customer Dashboard.

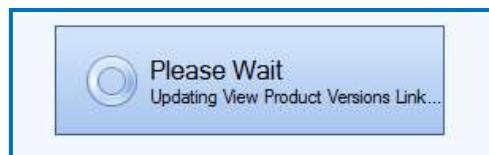
Web Update

Check for New Dashboards



To ascertain if there are any **new** Community or Customer or even **updated** Dashboards, click on Check for New Dashboards.

Snapshot will poll the cloud server and download any updates.



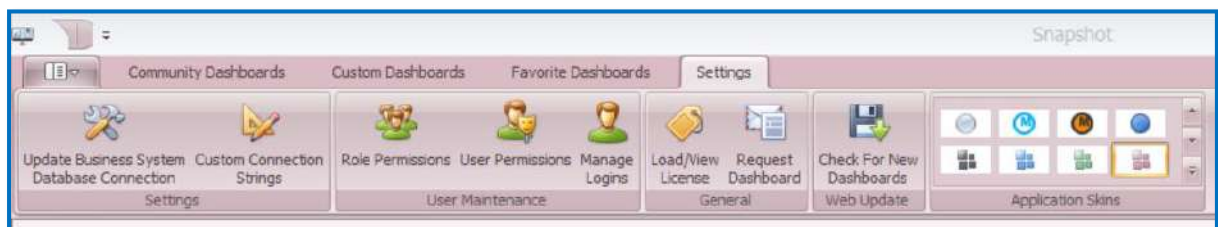
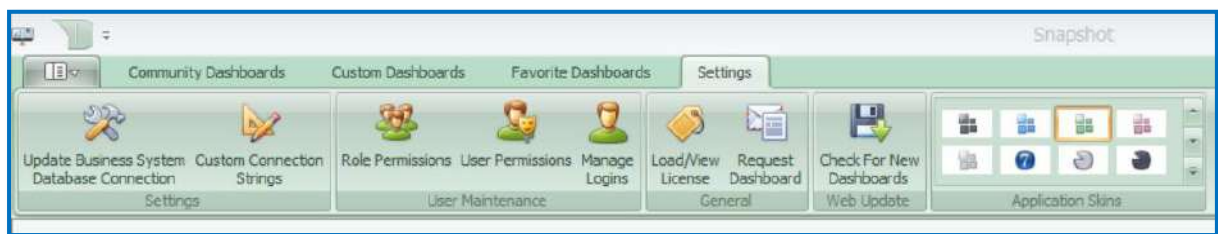
Note:

This update takes place automatically on log in, regardless.

Application Skins



You are able to change the Snapshot look and feel by choosing a new skin. The examples below will give you some idea of the options available.



Other useful stuff

Updating Snapshot

Snapshot is updated regularly by our development team. When the Update button on the front screen is NOT greyed out, click on Update and follow the step by step procedures to update your Snapshot.



Support

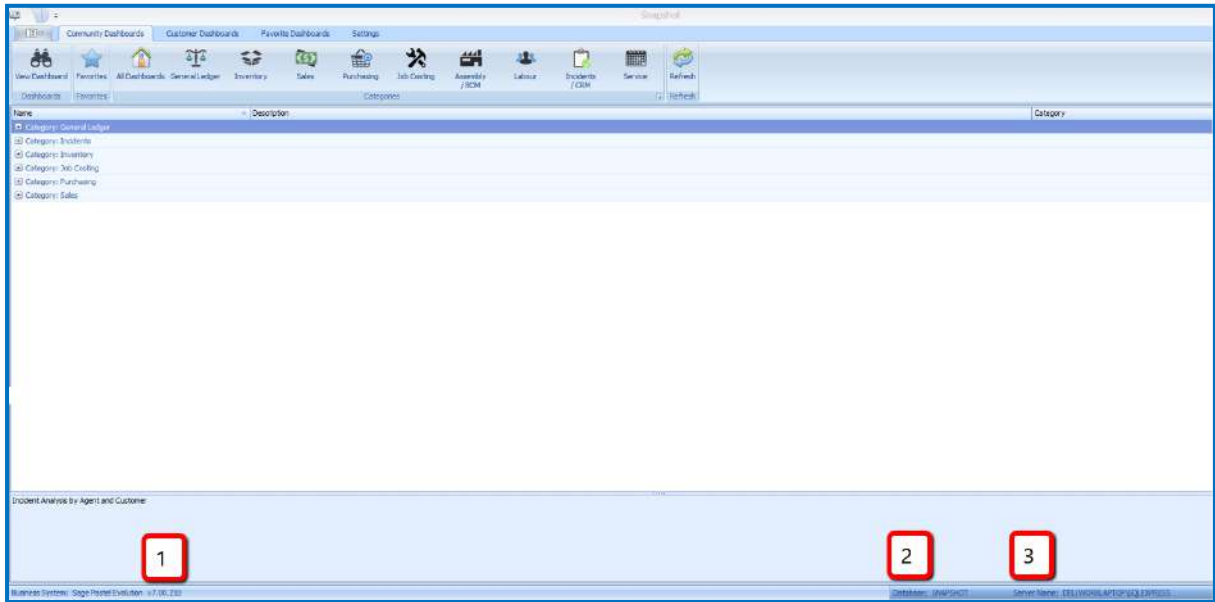
Generally speaking, there is very little support required for users of Snapshot.

That's because the software intelligently produces useful business views of data that exists within your Accounting and or Payroll solution and does not deal with transactional data.

However, if you do need assistance contact either your partner or email us on support@plussoftsolutions.com

Information on Home Screen

The front page of Snapshot will always display certain important information as indicated by 1, 2 and 3 below:

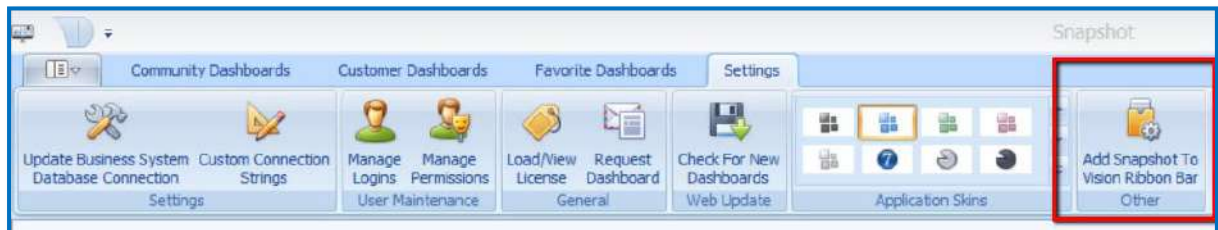


1. The name and version of Business System
2. The Database that Snapshot is connected to
3. The Server Name

The Snapshot version number is also shown on the bottom right too.

Adding Snapshot to Menu of Business System

Some Accounting or Payroll vendors allow Snapshot to be added to a menu bar, within the business application.



If this option is available on the menu bar within Snapshot, it may be useful to access Snapshot from within that business application.

Notes page

Scribble and doodle on this page if your trainer bores you. 😊

Thank you for using Snapshot.

To view other solutions from Plus Software please visit our website at www.snapshotbi.com

