



AccountMate
SOFTWARE THAT FITS

AccountMate's Dashboard is a visual representation of the company's financial health. Developed in conjunction with Microsoft Power BI, this feature is a standard part of the AccountMate System Manager module. It uses interactive charts, graphs, and other visuals to highlight key aspects of the company's operations. Its role-based access controls ensure that only authorized users gain access to sensitive financial information. It seamlessly integrates with AccountMate's core modules to provide visibility into the company's financial health which helps you make faster decisions, streamline analysis, and collaborate securely with confidence.

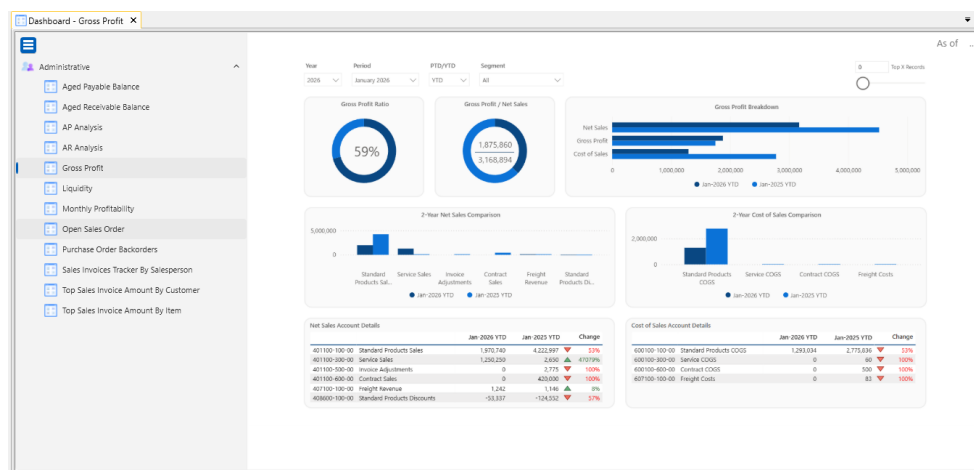
AccountMate Enterprise 2026

Dashboard

Easy Access to Financial Dashboards

With Enterprise Dashboard, authorized users now have easy and secure access to key financial indicators for evaluating business performance. The dashboard feature provides a visual overview of a company's financial health with data automatically updated on a user-defined schedule. Users can quickly access and view dashboards to which they are granted permission simply by selecting from the list on the left side of the dashboard page.

These visual panels are regularly updated and are available on demand. This allows for timely, informed decision-making and enables stakeholders to proactively address risks and respond to opportunities as they come.



Dashboard – Gross Profit

Role-Based Access Controls

Access to dashboards is restricted to users with the appropriate permissions. As such, administrators configure user access rights in the System Administrator module, based on the role or group to which the user belongs. In the Dashboards tab of the Roles function, select the metrics for which you want to grant user access rights by marking the appropriate checkbox. This built-in role-based access control simplifies the setup. Administrators do not need to separately set up the users and roles in Microsoft Power BI to assign access rights. Once the required permissions are granted, authorized users can click on the Dashboard icon on the System Bar anytime regardless of the module currently accessed.

Developed using Microsoft Power BI

Built on Microsoft Power BI, the dashboard delivers enterprise-grade analytics supported by cloud scalability and seamless integration with AccountMate Enterprise. Leveraging Power BI's secure and trusted infrastructure, it delivers fast data processing, reliable performance, and a flexible analytics platform that grows with your business. Users benefit from this intuitive interface and powerful analytical capabilities.



Powerful Data Visualizations and KPI Widgets

When the Dashboard feature is activated, it transforms raw financial data into clear, easy-to-understand visual insights through interactive charts, dynamic visualizations, structured financial reports, and drillable analytics. It also features built-in KPI widgets that provide instant visibility into the status of Key Performance Indicators (KPIs) using time comparisons or visual signals like arrows, color coding, and mini charts showing direction. These KPI widgets help users quickly assess whether performance is on track, improving, or falling behind without the need to open detailed reports.

Export or Print Reports

Users with the appropriate access rights can export or print reports. The export file format currently supported is PDF. Users can email the exported PDF to their desired recipients. In addition, users have the option to print the dashboard page. This opens a Print dialog box where you can select the printer, layout, number of pages, paper size, and copies to print among other settings.

Seamlessly Integrates with AccountMate Core Modules

Enterprise Dashboard is a feature of the System Manager module. It is fully integrated with AccountMate's other modules, allowing users direct access to it while accessing any module in the system. In its current iteration it leverages information drawn from General Ledger, Accounts Payable, Accounts Receivable, Purchase Order, and Sales Order modules to provide the data source that is used to generate the various graphs, charts and visuals that appear in each dashboard. This seamless integration allows the dashboard to access accurate, module-specific data ensuring KPIs are correctly populated for meaningful analysis.

Other Features

- Users have the option to toggle the dashboard into full screen mode by clicking the Toggle button on the top-left side of the screen. This will magnify the dashboard screen filling up the whole AccountMate Enterprise window. Also, users can launch the screen into a separate, independent window where they can maximize or minimize the view or drag the screen to display in a separate computer monitor. Just click on the upper-right corner of the dashboard screen and select Open in a new window option.
- New functions specifically for Dashboard activation and setup are available. Administrators and authorized users activate the feature and complete the set-up process in the Connection and Setup functions in the System Administrator module.
- The system allows users to add more dashboards to the ones that are standard with AccountMate Enterprise in a few ways. First, they can add a new dashboard using a PBIX file or one that is accessible via URL. Second, they can add a new dashboard by importing one that is in the Power BI Cloud Service. Whichever approach they choose, the result is the ability to view all dashboards, the ones from AccountMate and those that are home grown, in one place – inside AccountMate Enterprise. Users are not required to leave the AccountMate Enterprise application and log on to Microsoft Power BI to view the dashboards.