



Pulse Report — User guide

Reports from your Excel — how the program works, step by step.

Version 0.1.0 · <https://adatpulzus.hu/pulse-report.html> · info@adatpulzus.hu

Your first report in five minutes

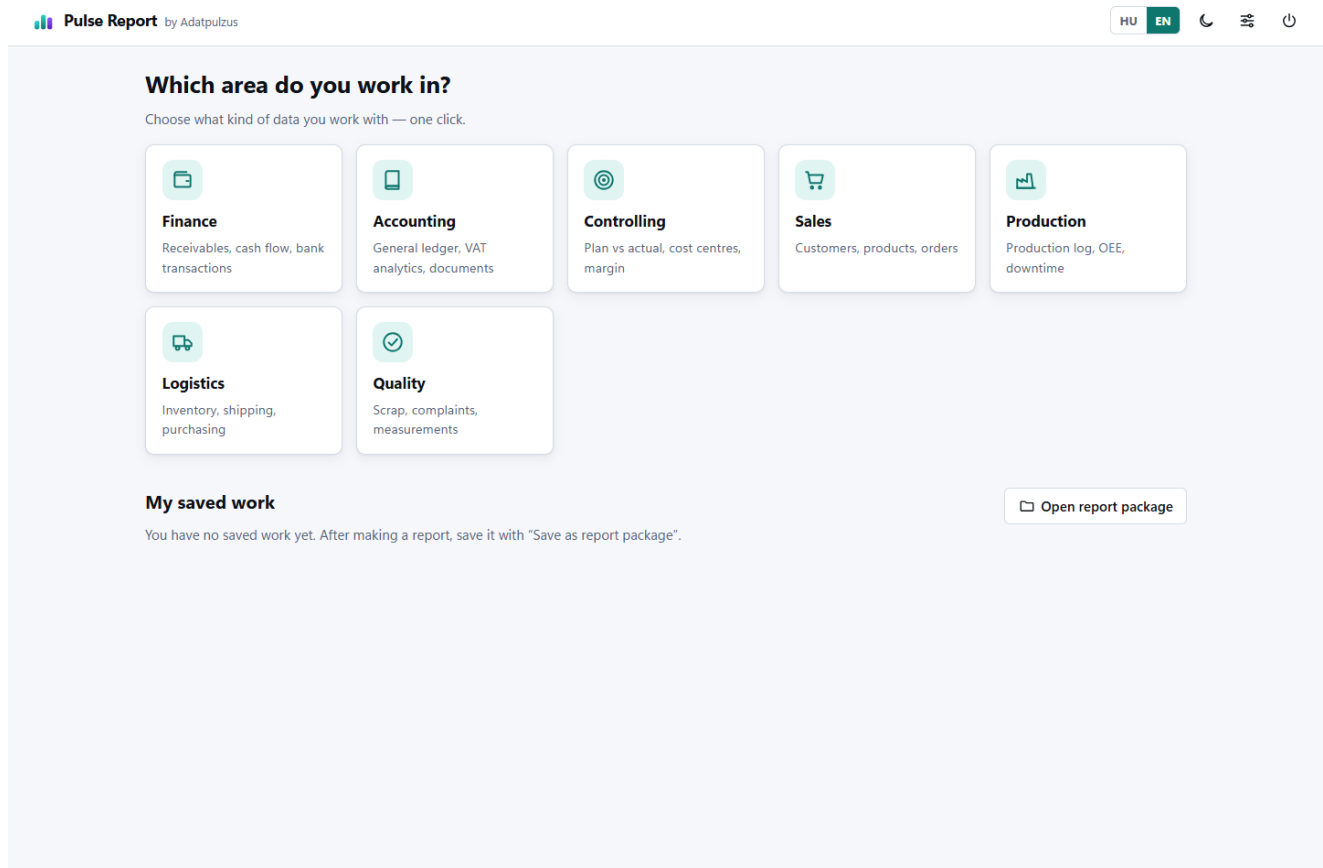
Pulse Report exists so that an Excel file turns into a finished report with a few clicks — without you having to know what a dashboard, a data model or a measure is. The program works on your own PC: your files go nowhere.

1. Start the program — it opens in your browser.
2. Pick the area your data belongs to (finance, accounting, sales...).
3. Drop in the Excel file or a whole folder.
4. Look at what the program offers and click what you need.
5. Export to PDF, Excel or an image — or put the reports on one page.

1. Home: which area do you work in?

After start-up the program asks what kind of data you work with. The area only decides which words and reports it looks for in the file — choose Finance for an invoice list, Production for a production log. If you chose wrong, the program says so at the overview and switches with one click.

Your **saved work** is here too: an earlier report package opens with one click and loads its data by itself if the file is still in the same place on your PC.

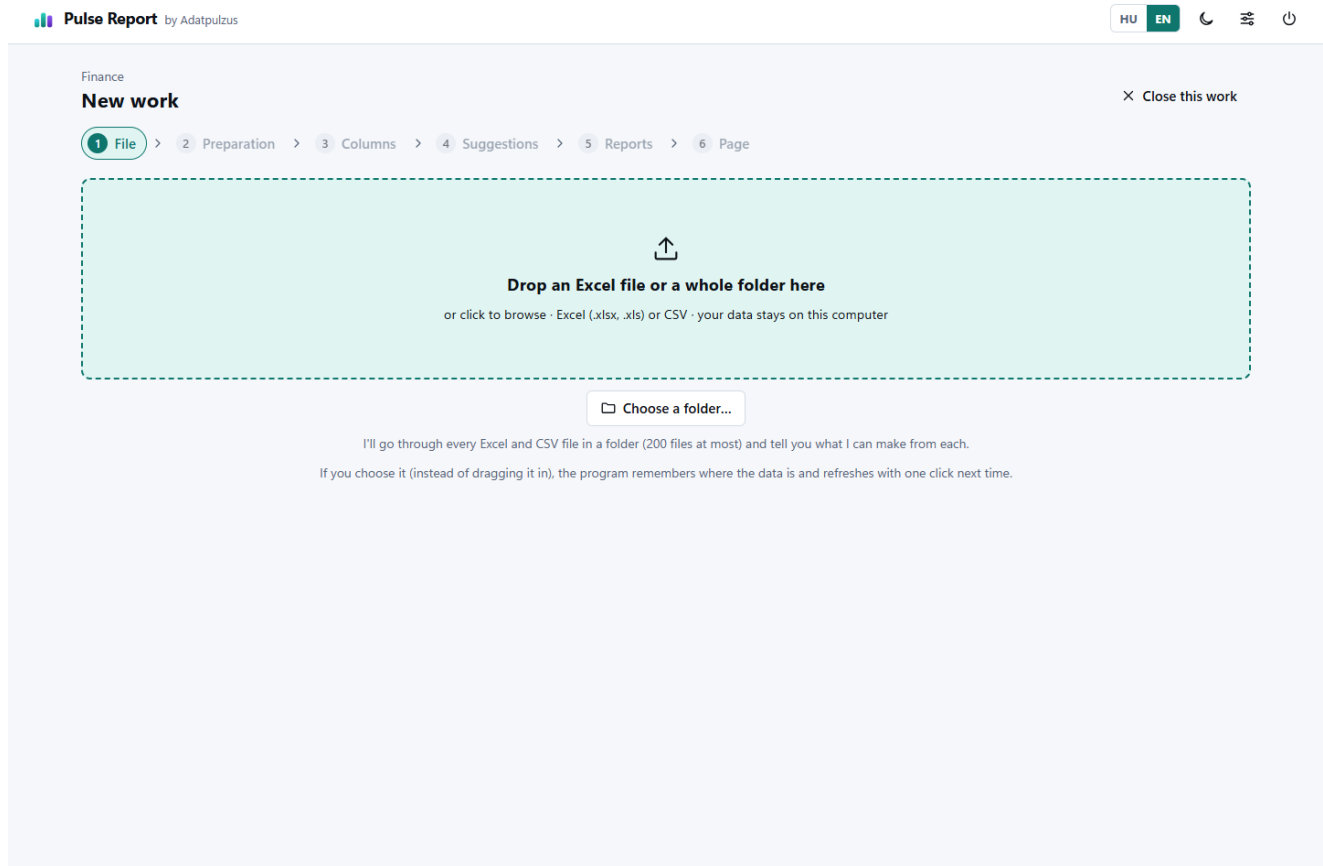


Home: the areas and your saved work

2. File: drop it in, or choose it

Drop the Excel (.xlsx, .xls) or CSV file into the box, or click it and browse. You can drop a **whole folder** too: the program looks through every file (up to 200) and tells you what can be made from each. If you **choose** the file (instead of dragging it), the program remembers where it is and refreshes from there with one click next time.

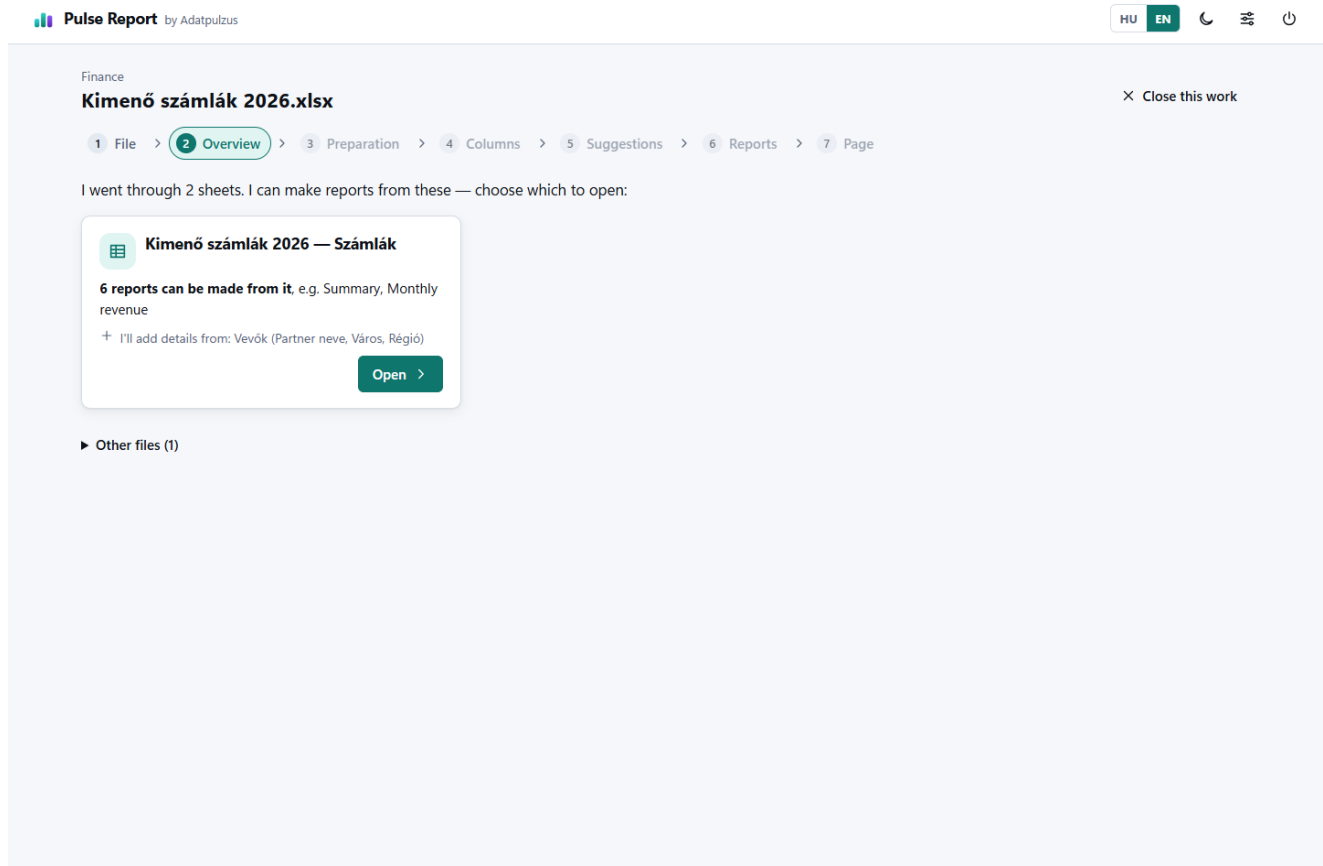
Your data stays on your PC. The program makes a working copy of the file in its own folder and deletes it when it quits.



Dropping in the file

3. Overview: what did the program find?

The program looks through every sheet and file and lists how many reports each can give — with examples. Files with the same structure (say, twelve monthly invoice lists) are stacked into one table so that a report shows the whole period. Lookup tables (customers, items, machines) are linked automatically: “Completed with: Customers”. Click **Open** on the one you want to work with.

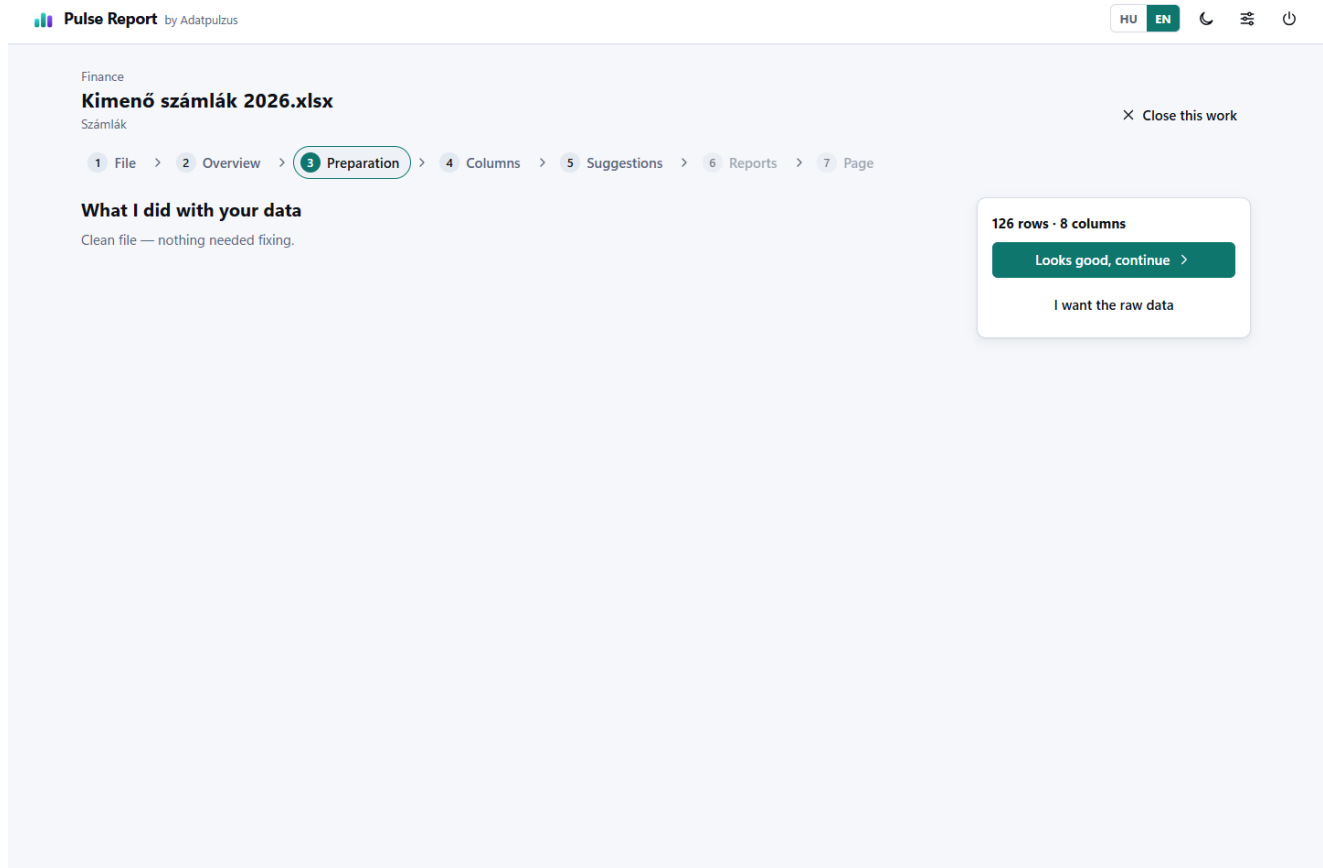


The overview: what can be made from which file

4. Preparation: what it did with your data

Excel is rarely a “clean table”: there are title rows, blank rows, merged cells, “Total” rows, local date and number formats. The program tidies these by itself and lists here what it did. Every step can be undone, the dropped rows can be inspected and taken back (“I need them after all”). If nothing had to be adjusted, it says so.

If you'd rather have the raw data as it is: **I want the raw data**. The program remembers the preparation and applies the same to next month's file by itself.



The preparation steps

5. Columns: what does each column mean?

The program recognises what each column means: "Invoice date" is a document date, "Net value" is a net amount. What it is sure about is marked green; where it isn't, it asks: "check whether the suggestion is right". You can accept the suggestions with one click, or pick the right concept from the list — the program remembers your decision and won't ask again for next month's file.

If an earlier decision is no longer right, **Back to the program's suggestions** drops it, and the program looks at the columns again with what it knows now.


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Finance
Kimenő számlák 2026.xlsx
Számlák

× Close this work

1 File > 2 Overview > 3 Preparation > **4 Columns** > 5 Suggestions > 6 Reports > 7 Page

I recognised 8 of 8 columns
Every column is recognised — no questions.

🔄 Back to the program's suggestions
On to the reports >

Column	Examples	Meaning	Status
Számlaszám	KSZ-2026-0001 · KSZ-2026-0002 · KSZ-2026-0003	Invoice number >	sure
Kelt	2 Jan 2026 · 13 Jan 2026 · 3 Jan 2026	Document date >	sure
Fizetési határidő	10 Jan 2026 · 21 Jan 2026 · 18 Jan 2026	Due date >	sure
Adószám	45678901-2-06 · 34567890-2-05 · 67890123-2-07	Tax number >	sure
Termékcsoport	Irodaszer · Szolgáltatás · Csomagolóanyag	Item group >	sure
Nettó összeg	235000 · 397000 · 406000	Net amount >	sure
ÁFA	63450 · 107190 · 109620	VAT amount >	sure
Bruttó összeg	298450 · 504190 · 515620	Gross amount >	sure

The columns and the recognised concepts

6. Reports: what the program offers

This is the heart of it. The program lists the reports it can make from the file and says why for each: "Suggested because the file has a date and a net amount." Click what you need — the report is made at once. For what is **nearly ready** it says what is still missing ("This still needs: customer name").

If there are lookup tables next to the file (the customers' city, the product group), the program also offers **completed variants**: the same report by city or by product group.

Pulse Report by Adatpulzus

Finance

Kimenő számlák 2026.xlsx

Számlák

Close this work

1 File > 2 Overview > 3 Preparation > 4 Columns > 5 Suggestions > 6 Reports > 7 Page

I can make 8 reports from this
I recognised 8 of 8 columns. [Check columns](#)

Summary quick view

Suggested because your file has an amount or quantity: "Nettó összeg".

Monthly revenue

Suggested because "Kelt" and "Nettó összeg" show how revenue develops month by month.

Receivables ageing

Suggested because the due date "Fizetési határidő" and the amount "Nettó összeg" show how much money is late and for how long.

Receivables by customer with extra details

Suggested because "Vevők > Partner neve" and "Nettó összeg" show who owes you the most. For this I added the Vevők data (matched by "Adószám").

Revenue by customer with extra details

Suggested because "Vevők > Partner neve" and "Nettó összeg" show which customers bring the revenue. For this I added the Vevők data (matched by "Adószám").

Top list

Suggested because your file has a name (e.g. customer or product) and an amount or quantity: "Termékcsoport", "Nettó összeg".

Breakdown

Suggested because your file has a name (e.g. customer or product) and an amount or quantity: "Termékcsoport", "Nettó összeg".

Quick view: over time quick view

Suggested because your file has a date and an amount or quantity: "Kelt", "Nettó összeg".

With details from the file's other sheets
I also took details from the file's other sheets (for example the product name), so I can show these too:

Top list — by Partner neve with extra details

I took "Partner neve" from the Vevők sheet, matched by "Adószám".

Breakdown — by Partner neve with extra details

I took "Partner neve" from the Vevők sheet, matched by "Adószám".

Top list — by Város with extra details

I took "Város" from the Vevők sheet, matched by "Adószám".

Breakdown — by Város with extra details

I took "Város" from the Vevők sheet, matched by "Adószám".

Top list — by Régió with extra details

I took "Régió" from the Vevők sheet, matched by "Adószám".

Breakdown — by Régió with extra details

I took "Régió" from the Vevők sheet, matched by "Adószám".

Almost possible

Balance over time To build this, you still need Running balance.

Overdue items by days late To build this, you still need Days overdue.

Cost structure To build this, you still need Expense category.

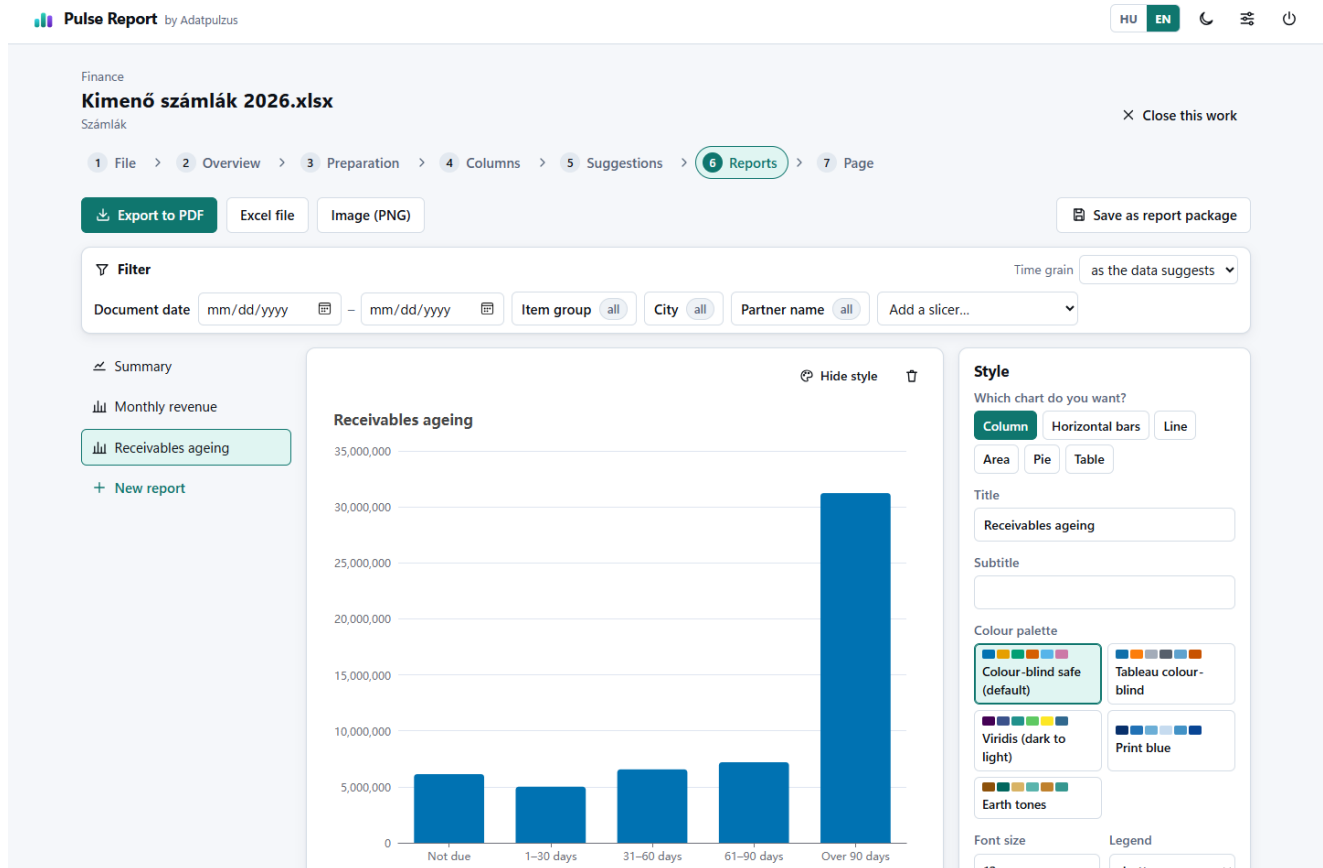
Exchange rate over time To build this, you still need Exchange rate.

The list of reports with the reasons

7. Reports: the finished report and its style

Your finished reports are in the list on the left, the selected one in the middle, the **Style** on the right. Switch the chart type with one click (column, bar, line, area, pie, table) — the program offers only what fits the data. Title, subtitle, colour palette, font size, scale (thousands, millions), decimals, number format; under **Colours and shape** gradient, rounding, background and your own colours. Save the settings as a **style profile** so every report looks the same.

Under every report there is a footnote: the source, what the preparation did, what it was completed with and which filter it was made with — this goes into the PDF too.



The report and the style panel

Export

- **PDF** — every report in one document, your company's logo and name in the header (Settings), with the footnotes. This is what you send on to the client.
- **Excel file** — the data and the chart as a native Excel chart, ready for further work.
- **Image (PNG)** — high resolution, for presentations.

Report package: save and refresh

Save as report package gives a .pulse file: the settings, the reports and the style — **no data in it**, you can send it by email. The work also appears under **My saved work**. When next month's file arrives, open the package and drop in the new file: every report refreshes by itself. If you loaded the file by choosing it, **Refresh from** takes the latest data with one click.

8. Page: several reports on one page

Put the finished reports on one page: the cards can be dragged, resized at their corner, and the program helps with alignment guides. **Arrange it for me** lays out everything by itself. The page becomes a single landscape A4 PDF page or an image — with the logo set in Settings.

Filtering: slicers and clicking

At the top of the page the program puts out the **slicers** by itself: the date (from-to) and the most important breakdowns (customer, product group, shift, machine...). Whatever you pick, every report is filtered to it, and the footnote says so ("Filtered: Customer = Alfa Ltd.; Jan – Sep 2026"). **Clicking** a bar, a slice or a table row filters the other reports to it — one more click undoes it. The

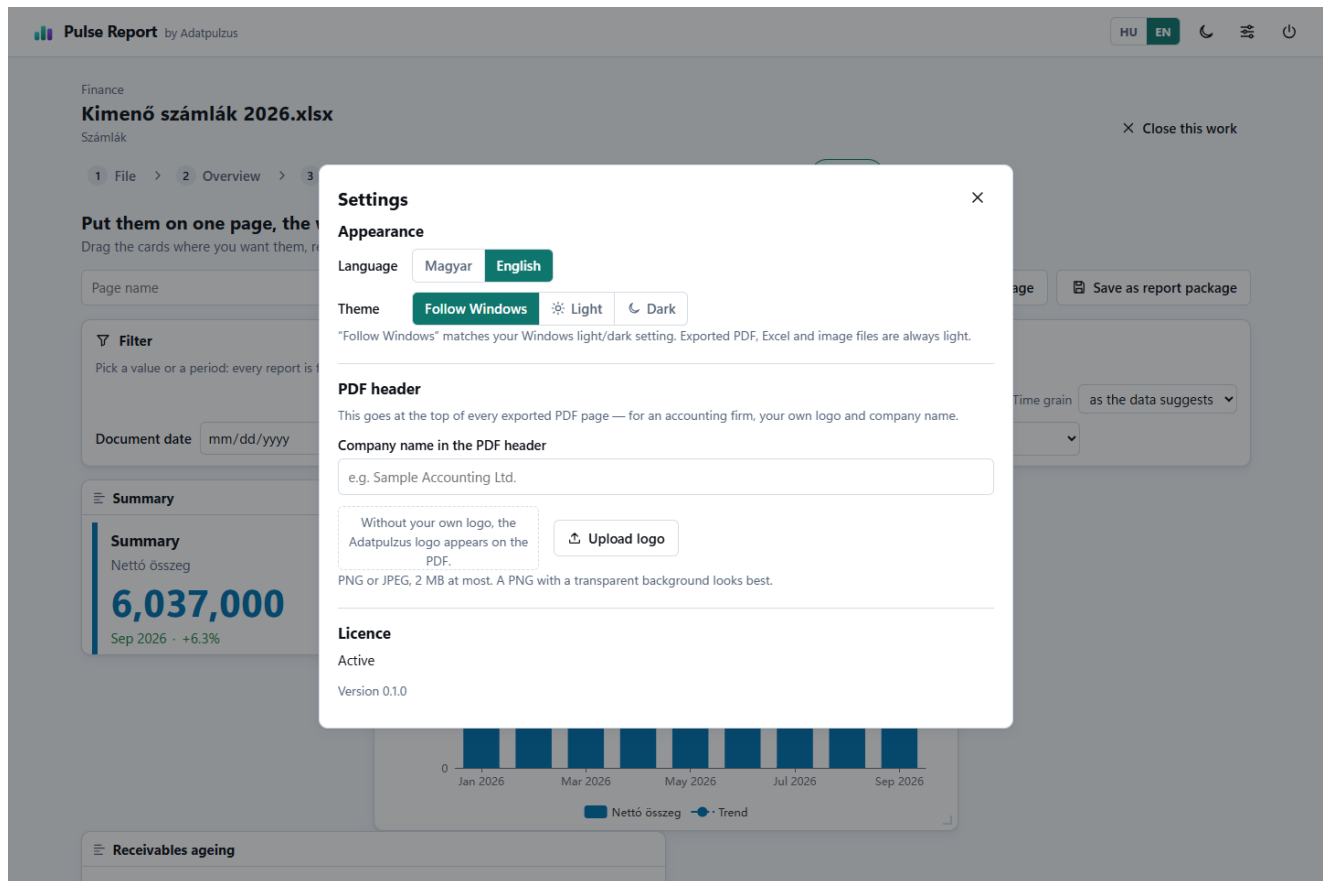
Time grain selector breaks the dated charts into days, weeks, months, quarters or years. The filters go into the report package too.

The screenshot shows the Pulse Report interface. At the top, there's a header with 'Pulse Report by Adatpulzus' and language/theme controls (HU, EN, dark mode, etc.). Below the header, the report title 'Kimenő számlák 2026.xlsx' is displayed. A navigation bar shows steps: 1 File, 2 Overview, 3 Preparation, 4 Columns, 5 Suggestions, 6 Reports, and 7 Page (active). Below this, a section titled 'Put them on one page, the way you like' provides instructions and buttons for 'Arrange it for me', 'Page to PDF', 'Page as an image', and 'Save as report package'. A 'Filter' section allows picking a value or period, with a 'Time grain' dropdown set to 'as the data suggests'. Below the filters, there are two main cards: 'Summary' showing 'Nettó összeg' of 6,037,000 for Sep 2026 (+6.3%) and 'Monthly revenue' showing a bar chart of monthly revenue from Jan 2026 to Sep 2026, with a trend line. A 'Receivables ageing' card is partially visible at the bottom.

The page with the slicers

9. Settings

- **The PDF header:** your company name and logo (PNG or JPEG, up to 2 MB) — it goes to the top of every exported page. Without your own logo, the Adatpulzus logo.
- **Language:** Hungarian or English — the interface switches at once, the reports and footnotes too.
- **Theme:** light, dark or as Windows. The exported PDF, Excel and image are always light.
- **Licence:** the licence status and expiry; here you can switch the licence off on this PC if you move it to another one.

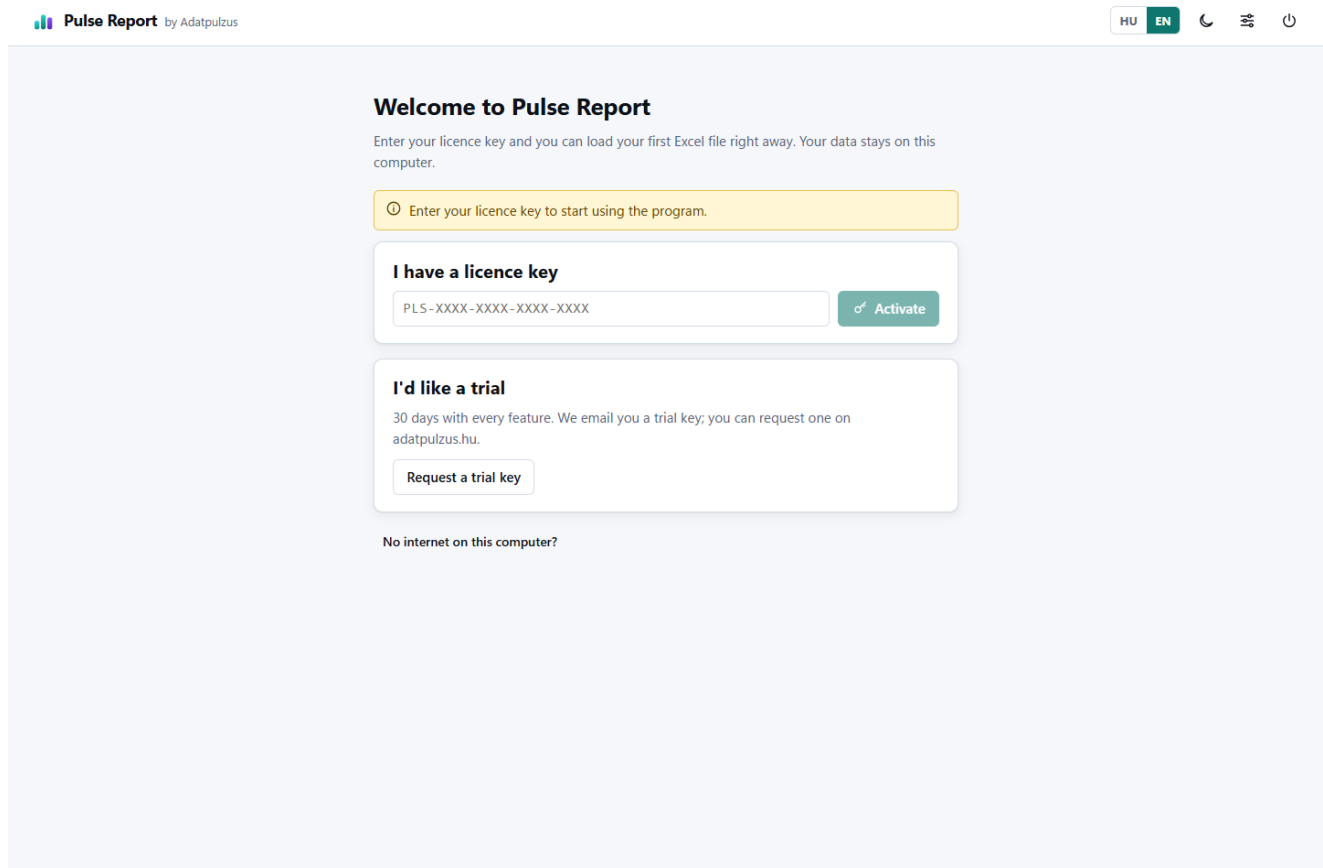


The settings

10. Licence, trial, read-only mode

The 30-day trial gives every feature and starts on first activation. The program warns before expiry. After expiry it switches to **read-only mode**: your saved work can be opened and exported, but no new report is made — after subscribing you continue with the same key. A licence runs on the allowed number of PCs; if you replace a PC, switch the licence off on the old one (Settings → Licence), or choose at activation which one the program should switch off.

The program talks to the server only about the licence: the machine identifier and the program version go across, nothing else. Without internet it works the same for 14 days (with an offline licence file, 90 days).



The activation screen

If you get stuck

- **"I can't make a report from this file yet."** Check the Columns step: if you say what each column means, the program offers more reports. Also check that you chose the right area.
- **The preparation dropped the wrong rows.** In the Preparation step look at the dropped rows and take them back, or switch that step off — the program remembers.
- **The browser tab closed.** Start the program again — your saved work is still there. The program stops by itself after 20 minutes of inactivity.
- **Got a question?** Write to us: info@adatpulzus.hu. The question is enough — you don't need to send your file.