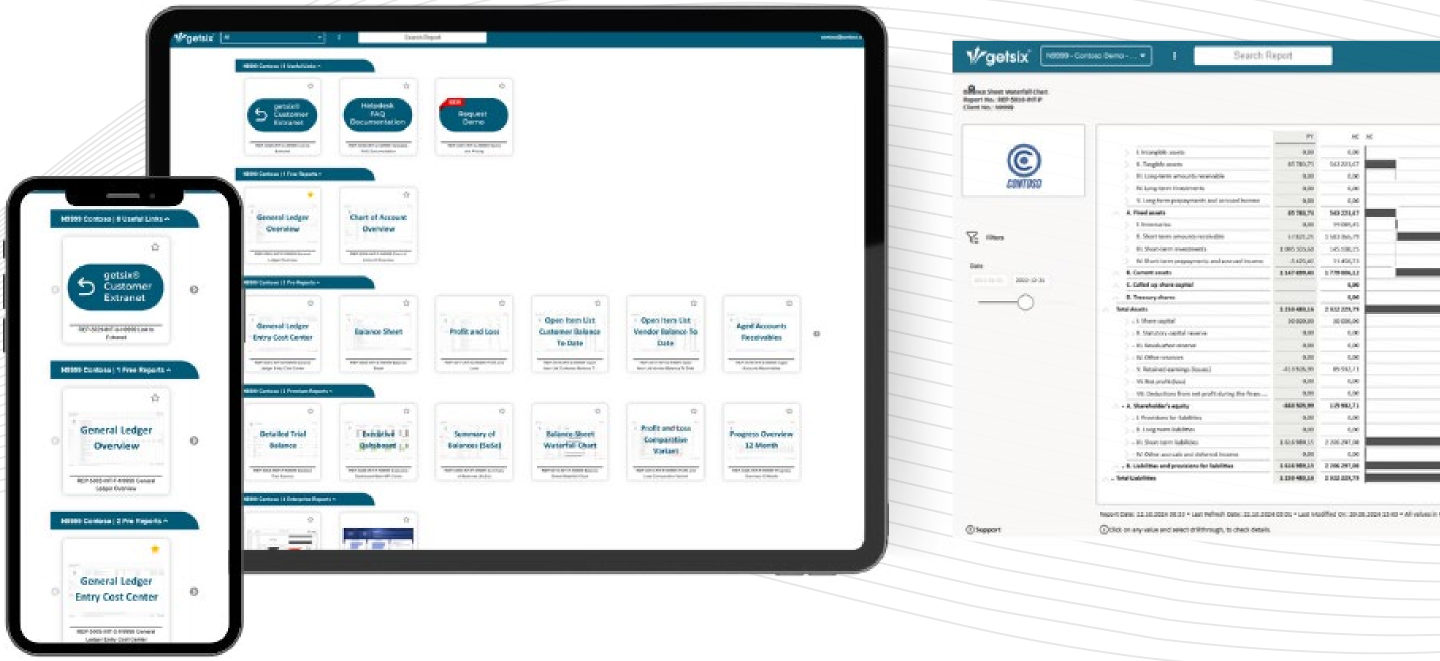
getsix®

USER MANUAL
E-SERVICES

USER MANUAL
CUSTOMER BI AND REPORTING PORTAL



DATA-DRIVEN BUSINESS INSIGHTS

INTERACTIVE • RELIABLE • SECURE

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1. INTRODUCTION

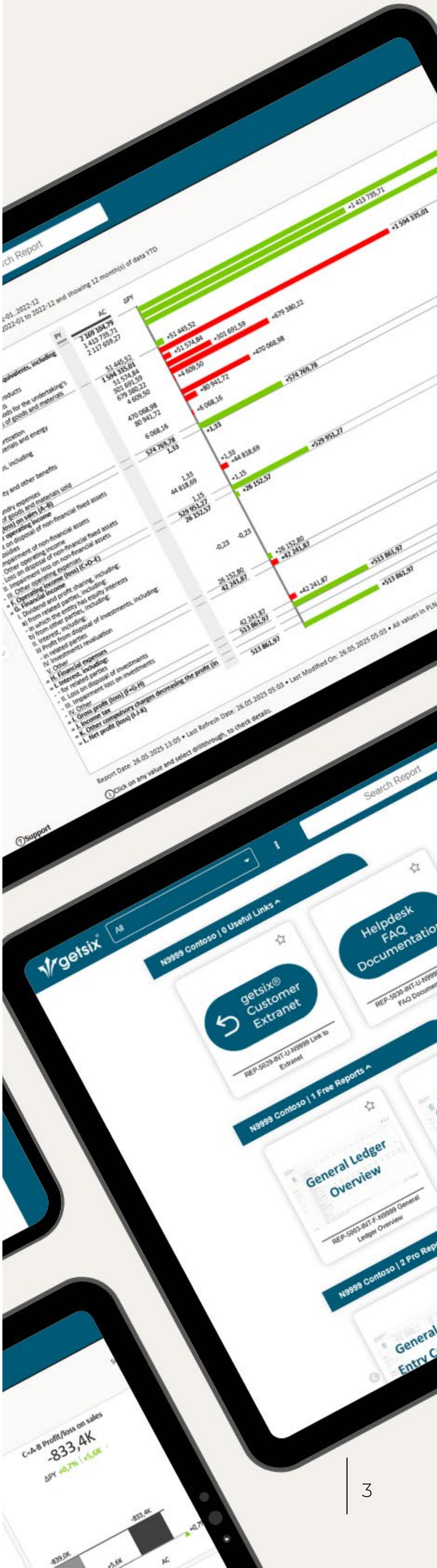
ABOUT THE SERVICE

Customer BI and Reporting Portal is an advanced analytical tool that enables companies to analyze detailed reports.

Using Power BI technology, it supports informed decision-making by providing clear and up-to-date insights.

ADVANTAGES OF THE PORTAL

- **Fast implementation** – access to reports within 1 business day after payment in the subscription model.
- **Limited costs** – clients using our solution do not need to invest in Power BI licenses or engage specialists for its implementation – everything is provided as part of our service.
- **Start with ready-made reports and visualizations** – you get a ready set of useful, proven, intuitive, and clear reports that are available immediately after system launch. This allows you to immediately start analyzing data and making better business decisions.
- **Simplicity without compromise** – our solution is intuitive and user-friendly. Even people without technical background will quickly find their way in the reporting environment and will be able to work effectively with data.
- **Scalability and development** – you can add or remove new reports, modules, or data sources over time, without having to build everything from scratch
- **Data governance** – our solution ensures compliance with data governance principles – data is organized, secure, and accessible only to authorized users.



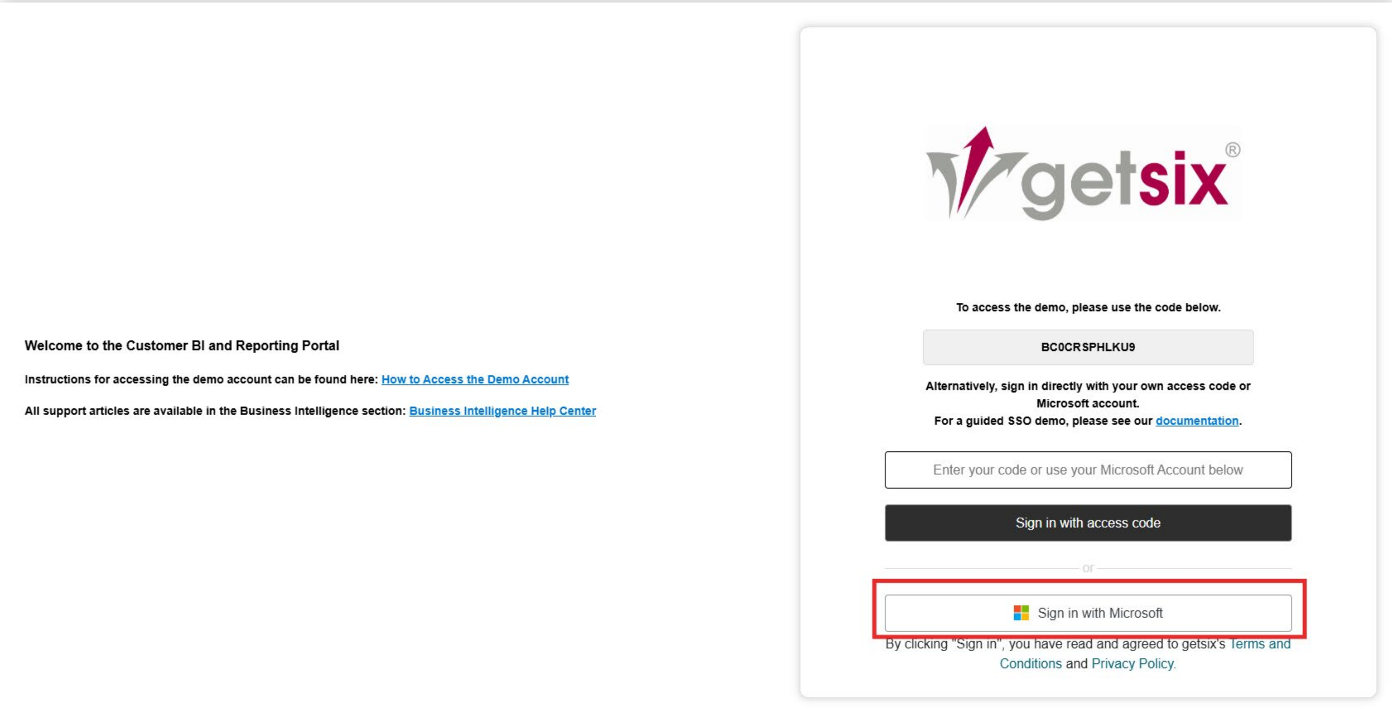
2. ACCESS AND LOGIN TO THE PORTAL

ACCESS TO THE PORTAL VIA INTERNET BROWSER

To log in to the getsix® Customer BI and Reporting Portal, use the following link:
getsix.support/bir/portal

The portal will open in a new browser tab.

Please make sure you log in with your **Microsoft account**.



If you were previously logged in as a demo user, please sign out first before logging in again with your Microsoft account.

You can also log in to the portal using a mobile device. The login process looks the same as on a computer – simply open the link in your mobile browser and sign in with your Microsoft account. The portal is fully responsive, so you can access your reports conveniently from your phone or tablet.

3. PORTAL STRUCTURE

After logging in to the **getsix® Customer BI and Reporting Portal**, the user is directed to the home screen, where reports and resources are organized into clear sections. The layout of the portal is always the same, while the scope of available reports depends on the selected subscription plan (Free, Pro, Premium, Enterprise).

MAIN MENU

At the very top of the portal, users will find the main navigation bar, which provides quick access to key functions and reports. It includes a search bar as well as a dropdown menu for navigation.

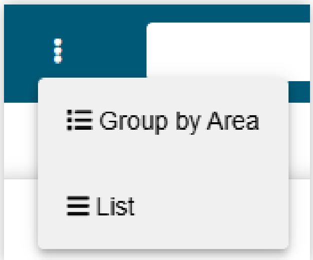
SEARCH BAR (SEARCH REPORT)

Allows you to quickly find a report by name. Simply type a few letters or numbers, and the system will automatically suggest matching reports.

ADDITIONAL OPTIONS MENU (THREE DOTS)

Allows you to change the display mode of reports. You can choose between

- Group by Area (reports shown in sections) or
- List (all reports displayed in a simple list view).

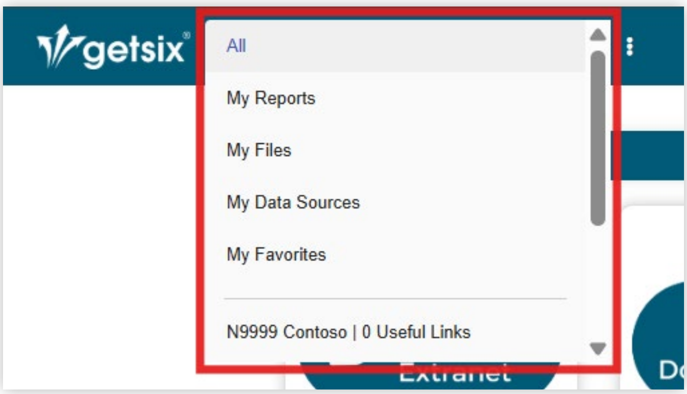


DROPDOWN MENU OPTIONS

By default, the dropdown menu displays “All”, which shows all reports available to the user.

The following options are also accessible:

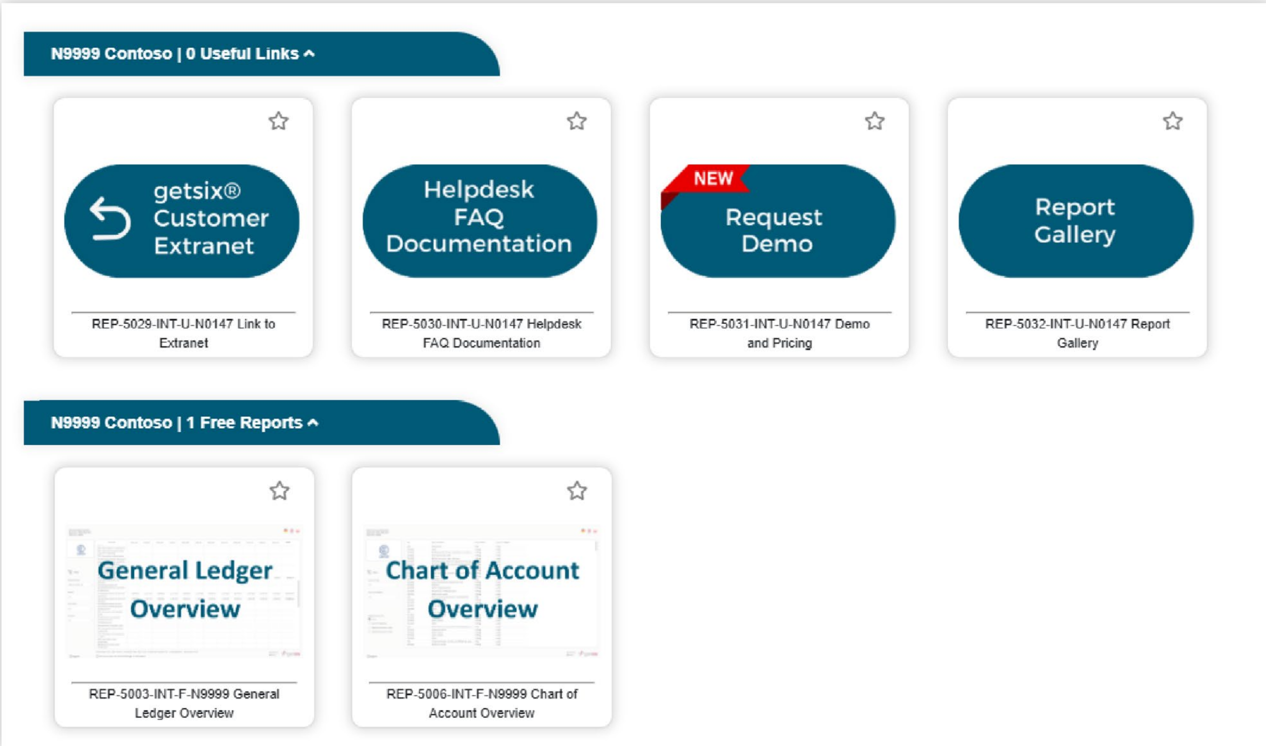
- My Reports
- My Files
- My Data Sources
- My Favorites
- Area-specific sections



REPORT SECTIONS

The home screen is divided into expandable sections with clear headers, for example:

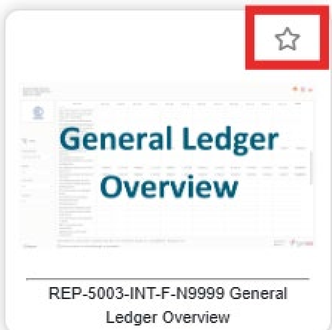
- **Useful Links** – useful resources:
  - » **getsix® Customer Extranet** – direct link to the client extranet.
  - » **Helpdesk an FAQ documentation** – access to support materials.
  - » **Report gallery** – preview of available report types.
  - » **Demo request**– option to request a demo of additional reports.
- **Free Reports** – section with reports available to getsix® accounting clients using Business Central.
- **Pro Reports, Premium Reports, Enterprise Reports** – sections corresponding to the selected subscription plans.
- **Scheduled PDF Reports** – a section where users can access scheduled reports in PDF format, delivered automatically to the designated e-mail addresses.



REPORT CARDS

Each report in the portal is presented in the form of a card, which contains:

- the report name,
- a preview thumbnail,
- a reference number (e.g. REP-5003),
- a star icon in the top right corner – to add the report to the **My Favorites** section.



4. BASIC FUNCTIONALITIES

INTERACTIVE NAVIGATION

The portal provides a set of interactive tools that allow users to explore and analyze data efficiently.

1. FILTERS

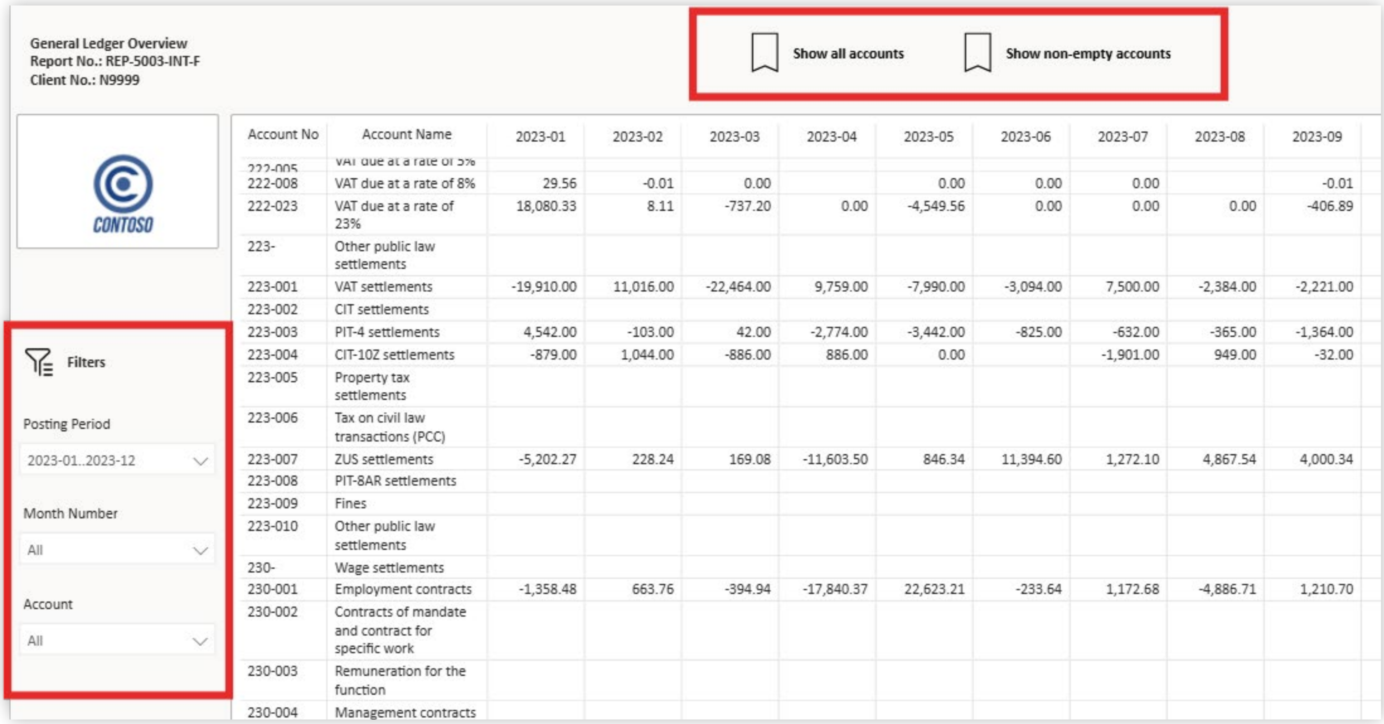
Most reports in the getsix® Customer BI and Reporting Portal include a filter panel located on the left-hand side of the screen.

Filters allow users to narrow down the displayed dataset, for example by:

- period,
- account,
- vendor,
- document status,
- or other report-specific criteria.

Multiple filters can be combined to create a tailored view of the data.

In some reports, however, filters may be placed in a different part of the screen (e.g. above the report). Regardless of their location, filters work in the same way.



General Ledger Overview
Report No.: REP-5003-INT-F
Client No.: N9999

Show all accounts
Show non-empty accounts

CONTOSO

Filters

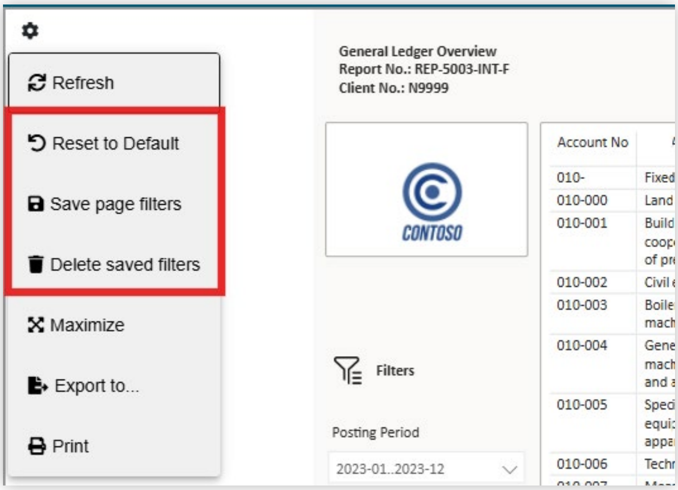
Posting Period
2023-01..2023-12

Month Number
All

Account
All

Account No	Account Name	2023-01	2023-02	2023-03	2023-04	2023-05	2023-06	2023-07	2023-08	2023-09
222-005	VAT due at a rate of 5%									
222-008	VAT due at a rate of 8%	29.56	-0.01	0.00		0.00	0.00	0.00		-0.01
222-023	VAT due at a rate of 23%	18,080.33	8.11	-737.20	0.00	-4,549.56	0.00	0.00	0.00	-406.89
223-	Other public law settlements									
223-001	VAT settlements	-19,910.00	11,016.00	-22,464.00	9,759.00	-7,990.00	-3,094.00	7,500.00	-2,384.00	-2,221.00
223-002	CIT settlements									
223-003	PIT-4 settlements	4,542.00	-103.00	42.00	-2,774.00	-3,442.00	-825.00	-632.00	-365.00	-1,364.00
223-004	CIT-10Z settlements	-879.00	1,044.00	-886.00	886.00	0.00		-1,901.00	949.00	-32.00
223-005	Property tax settlements									
223-006	Tax on civil law transactions (PCC)									
223-007	ZUS settlements	-5,202.27	228.24	169.08	-11,603.50	846.34	11,394.60	1,272.10	4,867.54	4,000.34
223-008	PIT-8AR settlements									
223-009	Fines									
223-010	Other public law settlements									
230-	Wage settlements									
230-001	Employment contracts	-1,358.48	663.76	-394.94	-17,840.37	22,623.21	-233.64	1,172.68	-4,886.71	1,210.70
230-002	Contracts of mandate and contract for specific work									
230-003	Remuneration for the function									
230-004	Management contracts									

To improve daily work, the portal also offers options for managing filters, available from the gear icon in the top left corner of the report view:



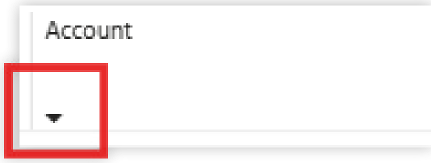
- **Save page filters** – save filter settings so that the report opens with the same configuration in future sessions.
- **Delete saved filters** – remove previously saved filter settings.
- **Reset to default** – return to the default report view.

2. SORTING

Sorting allows users to reorder data in tables or visualizations in **ascending or descending order**, depending on the selected column or value. This makes it easier to analyze trends, compare figures, or highlight the highest/lowest values.

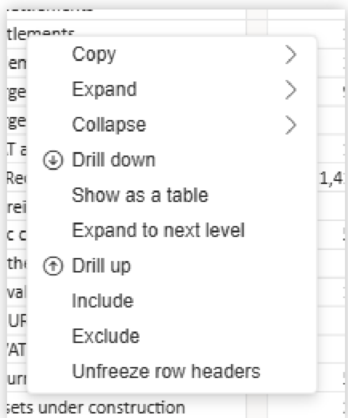
The sorting option is not available in all reports – its availability depends on the report design and data structure.

When sorting is applied, a small arrow icon appears next to the column header, indicating the current sorting order.

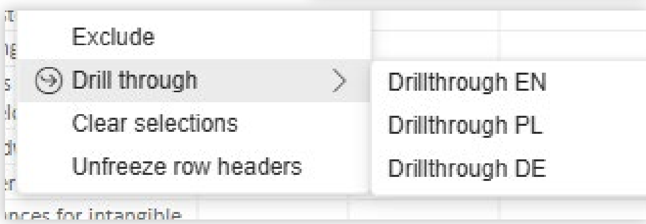


3. DRILL-THROUGH AND DRILL UP/DOWN

The portal allows users to move between different levels of data aggregation, which makes it possible to analyze both summary values and detailed records.



- **Drill down** – lets users navigate into a more detailed view of the data, for example from account groups to individual accounts or from months to individual posting days.
- **Drill up** – returns the user to a higher aggregation level (e.g. from detailed accounts back to account categories, or from days back to months).
- **Drill through** – opens a new, detailed report dedicated to the selected record. For example, clicking on an account balance may redirect the user to a separate report showing individual transactions. Drill-through reports may be available in different languages (EN/PL/DE), depending on system configuration.



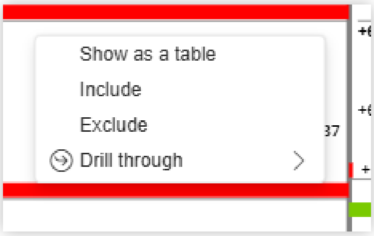
Drill options are usually available via the right-click menu on a data point or table row. Depending on the dataset, users may also see additional options such as **Expand** or **Collapse**, which allow for quick switching between different hierarchy levels without leaving the current report view.

4. SHOW AS TABLE

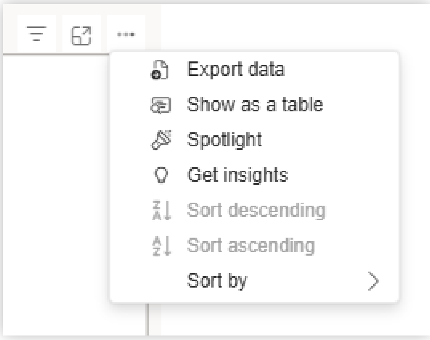
The Show as table option allows users to display the raw data and measures used to build the visualization in a standard tabular format. This view presents the values and calculations behind charts, KPIs, or aggregated tables in a clear, structured layout.

The option can be accessed in two ways:

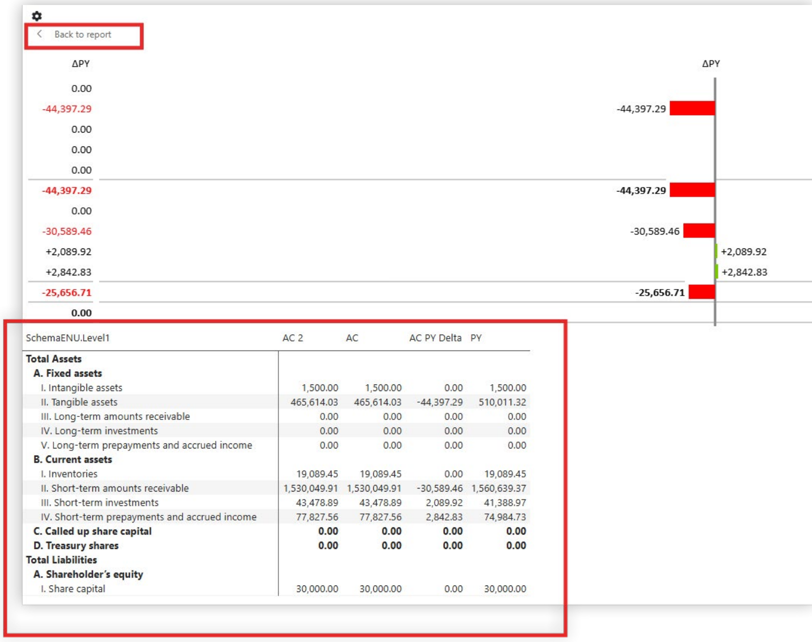
- by right-clicking on a data point within a visualization,



- from the three-dot menu located in the top-right corner of the visualization.



After selecting Show as table, the screen will display the visualization on top and the detailed dataset in a table format below. To return to the original report view, click Back to report in the upper-left corner above the visualization.



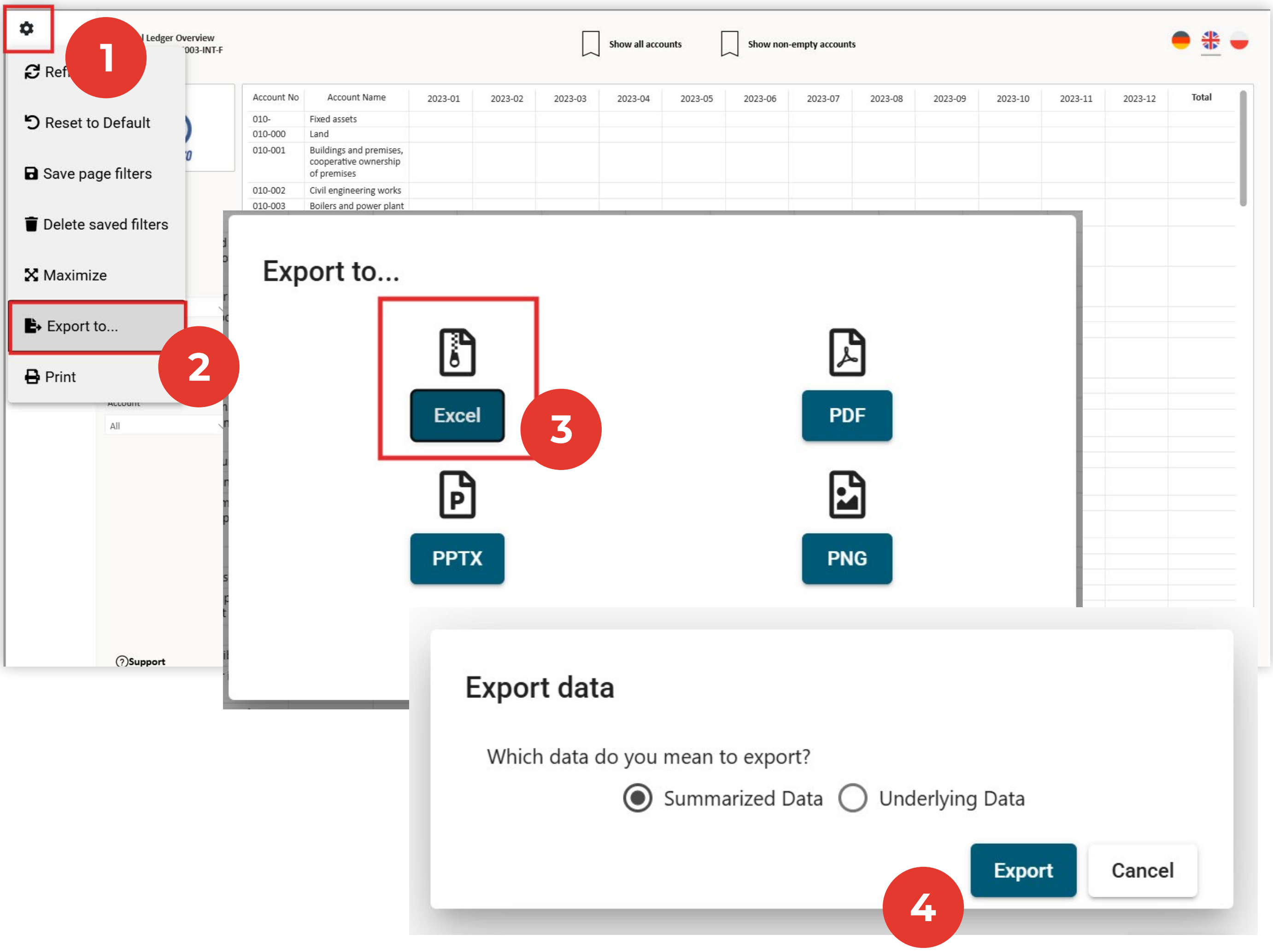
EXPORTING DATA

The portal provides several options for exporting report data, depending on the user's needs. Exports can be used for further analysis, presentations, or archiving.

METHOD 1

In the top-left corner of the report view, click the **gear icon** and select Export to.... A dialog window will appear, allowing you to choose the desired file format:

- **Excel** – two modes are available:
  - » **Summarized data** – exports data exactly as shown in the visualization (totals, averages, aggregates).
  - » **Underlying data** – exports detailed, raw records behind the visualization, allowing full insight into the source data.
- **PDF, PPTX, PNG** – the report is exported as a static file. After confirming the export, you will receive a notification, and the file will be delivered automatically to your e-mail address once ready.



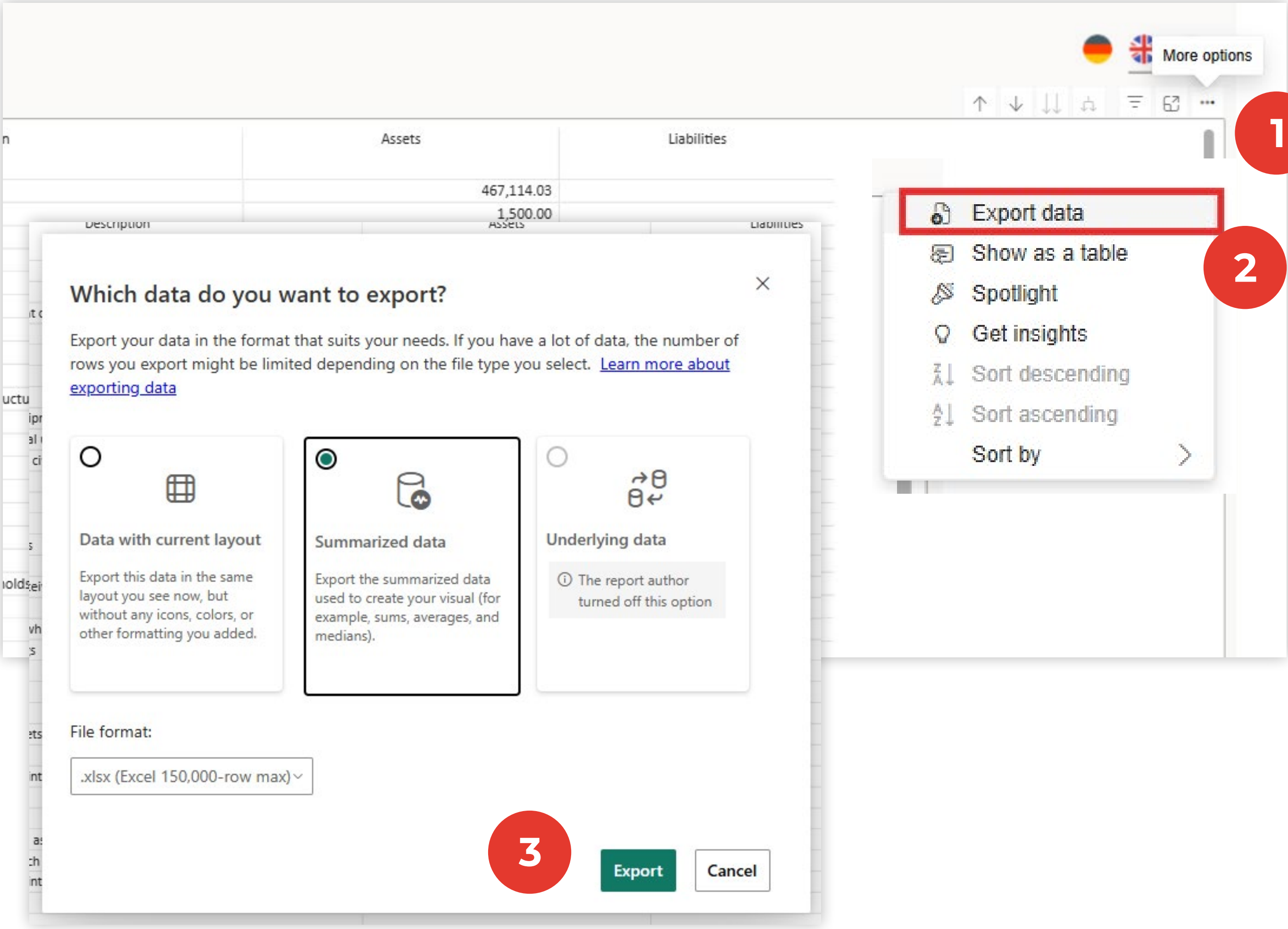
METHOD 2

By hovering over the top-right corner of a visualization, additional options appear. Select More options → Export data.

In this method, you can choose the type of export:

- **Data with current layout** – exports data in the same structure currently displayed, without icons, colors, or formatting.
- **Summarized data** – exports aggregated values used in the visualization (totals, averages, medians).
- **Underlying data** – not available in all reports.

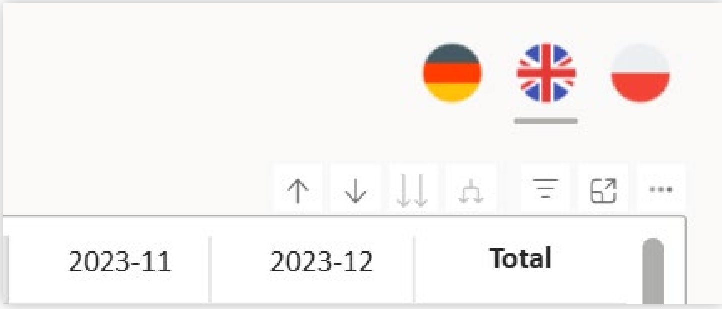
Exported files can be generated in **Excel** or **CSV** format.



5. HELPFUL FEATURES

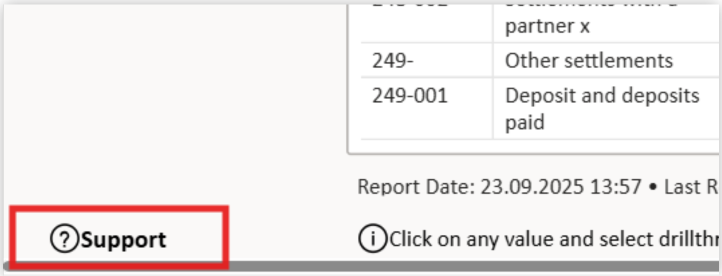
LANGUAGE SUPPORT

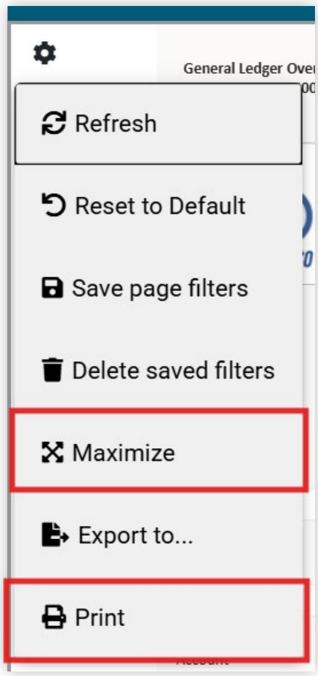
Reports in the getsix® Customer BI and Reporting Portal are available in multiple languages. In the top-right corner of each report, users can select their preferred language (Polish, English, German). The chosen language setting applies instantly, allowing international teams to work with the same data in their native language.



REPORT DOCUMENTATION SUPPORT

In the bottom left-hand corner of each report, you will find the "Support" button. Clicking it will redirect you to the HelpDesk page, where you will find detailed documentation for the report. After logging in, you can also submit a query to our IT team from there.





MAXIMIZE REPORT VIEW

From the gear icon menu in the top-left corner of the report, users can select the Maximize option.

This enlarges the report view, making it easier to focus on the content without other interface elements.

PRINT OPTION

In the gear icon menu located in the top-left corner of the report, you can select the Print option. This allows you to generate a printer-friendly version of the current report view.

Printed reports maintain the layout and structure of the on-screen report, which makes them suitable for meetings, reviews, or archiving in paper form.

BEST PRACTICES

To make the most of the reporting portal, we recommend the following practices:

- Use filters to focus only on the data relevant to your current analysis.
- Save frequently used filter configurations for quicker daily work.
- Add most important reports to My Favorites for faster access.
- For recurring analysis, consider combining the portal view with scheduled PDF reports delivered by e-mail.

USING THE PORTAL ON MOBILE DEVICES

The portal is optimized for desktop use, where navigation and analysis are most convenient.

- You can also log in from a mobile device – reports work in the same way as on a computer, but for extended work we recommend using a desktop or laptop.
- When using a phone, the best experience is achieved in landscape mode with the desktop site view enabled.
- We recommend using Google Chrome for the smoothest performance, although other modern browsers are also supported.

7. TECHNICAL SUPPORT

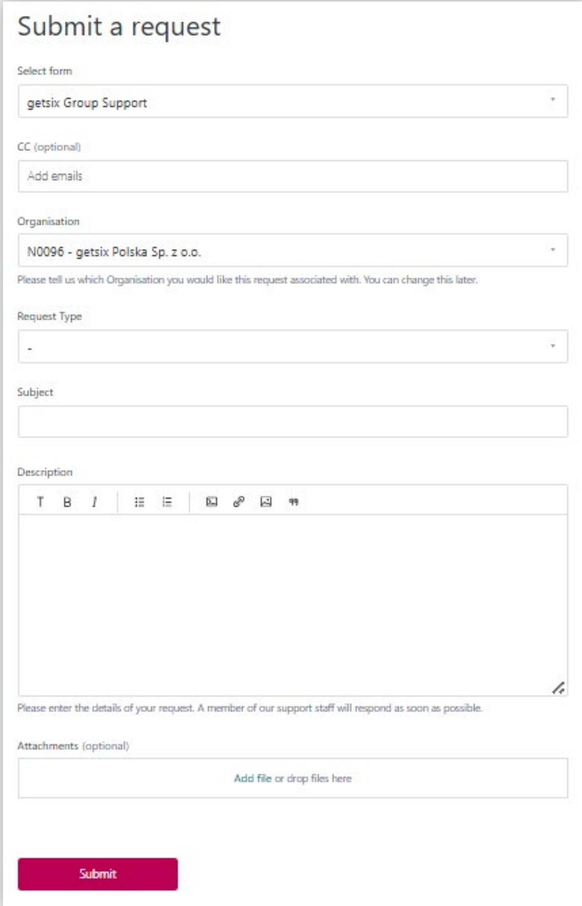
HELPDESK

We have created a **Helpdesk** for you, which can be accessed at: support.getsix.pl

There you will find:

- answers to frequently asked questions (FAQ) about the BI and Reporting Portal,
- a form to submit a ticket in case of additional questions or issues,
- and documentation related to the portal.

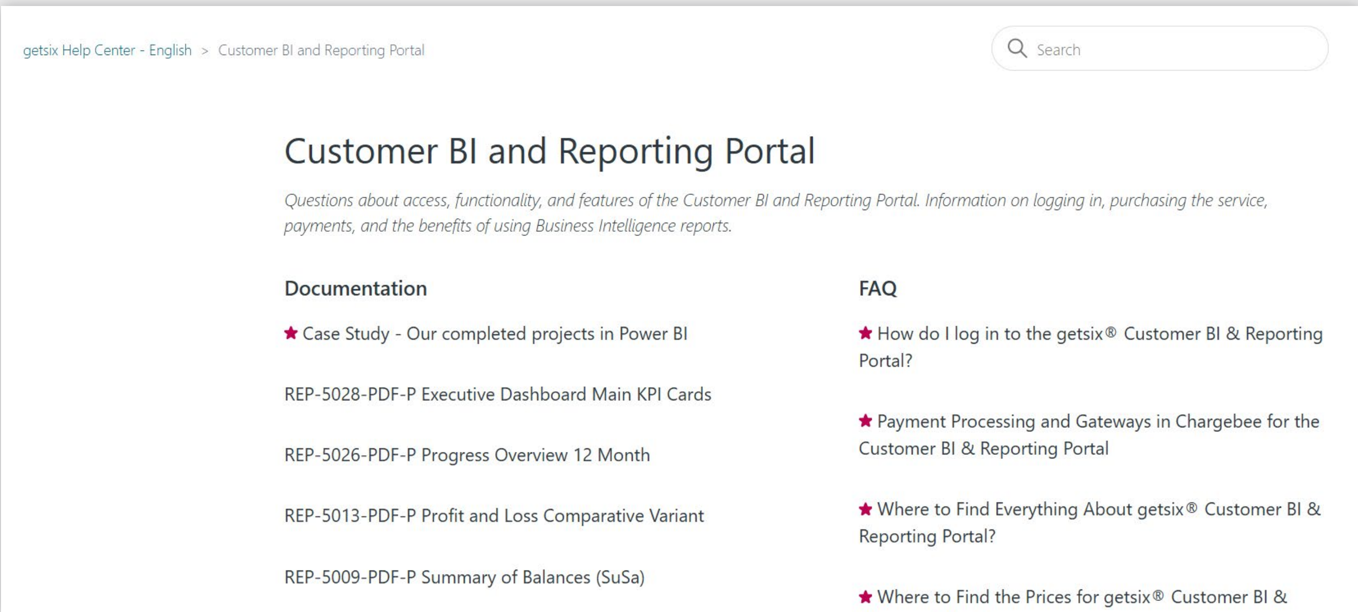
A ticket submitted via the “Submit a request” form is sent directly to our IT department. We will do our best to respond within 48 hours.



FREQUENTLY ASKED QUESTIONS

Before submitting a ticket, please check whether the answer is already available in the **FAQ section**. The search function will help you locate relevant information.

The FAQ (Frequently Asked Questions) section will be continuously updated with new explanations of the most frequently reported topics.



DOCUMENTATION

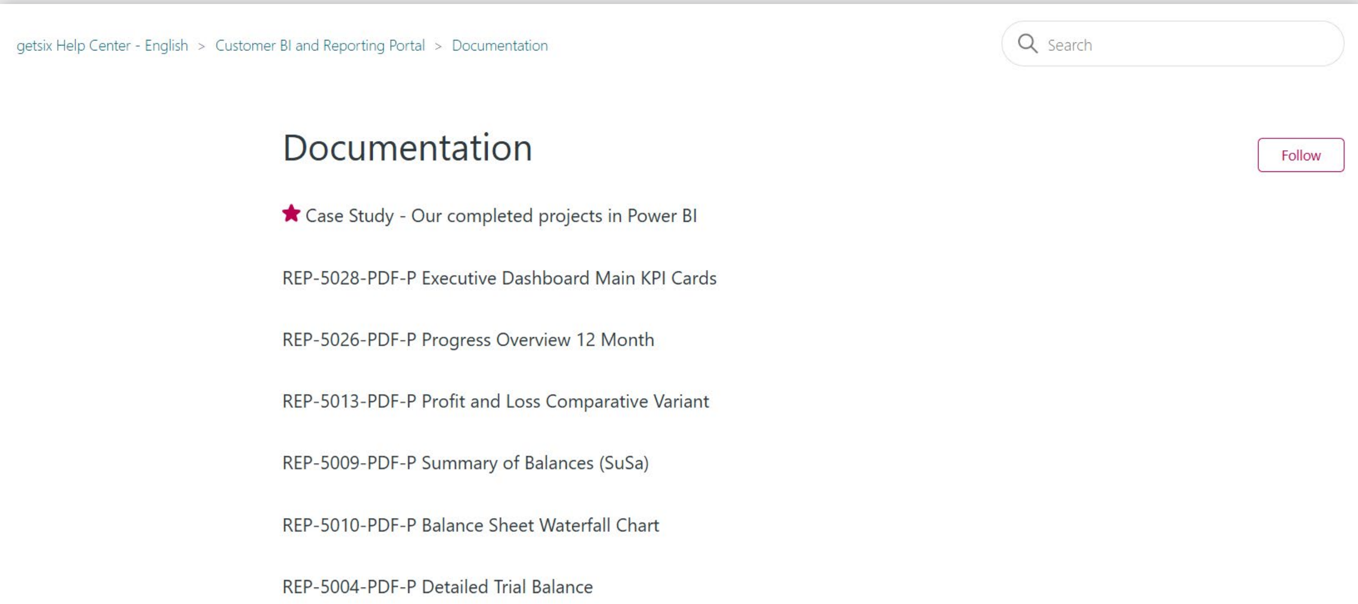
In the HelpDesk section, you will also find the "Documentation". The documentation contains a detailed description of all reports available in the getsix® Customer BI and Reporting Portal.

On the site, you will find thematically organised articles presenting:

- the purpose of a given report,
- data sources used for its generation,
- interpretation of the results,
- instructions for using the report in the system,
- additional technical or functional notes.

This documentation is helpful for both end users and those responsible for implementation, configuration or data analysis. It facilitates understanding of the structure and logic of the reports and supports daily work with the system.

It is recommended to visit this site regularly to keep up with updates or newly added reports.



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- getsix-services.com
- hlb.pl

Memberships

Certificates

NCAGE 2152H

Competencies

Partnerships

Item Code: E-00-18-02 (Oct.25 Ext v.001)