Tally Pulse — Getting Started Guide

Build native Salesforce reports by asking. This guide walks through one complete build, from a plain-English question to a finished report in your Salesforce org — showing exactly what Pulse asks you, what you control, and what gets created.

> Pulse never changes Salesforce without your approval. Until you approve a blueprint, everything is read-only.

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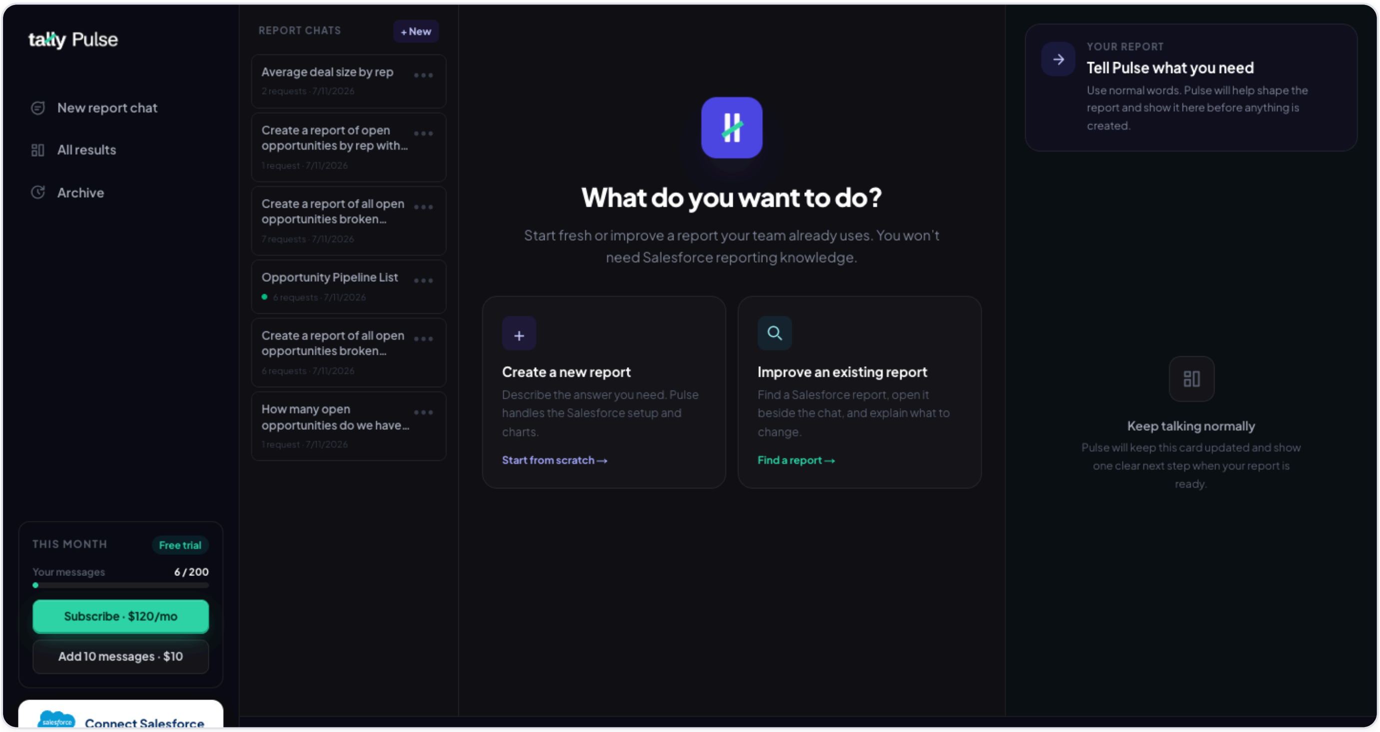
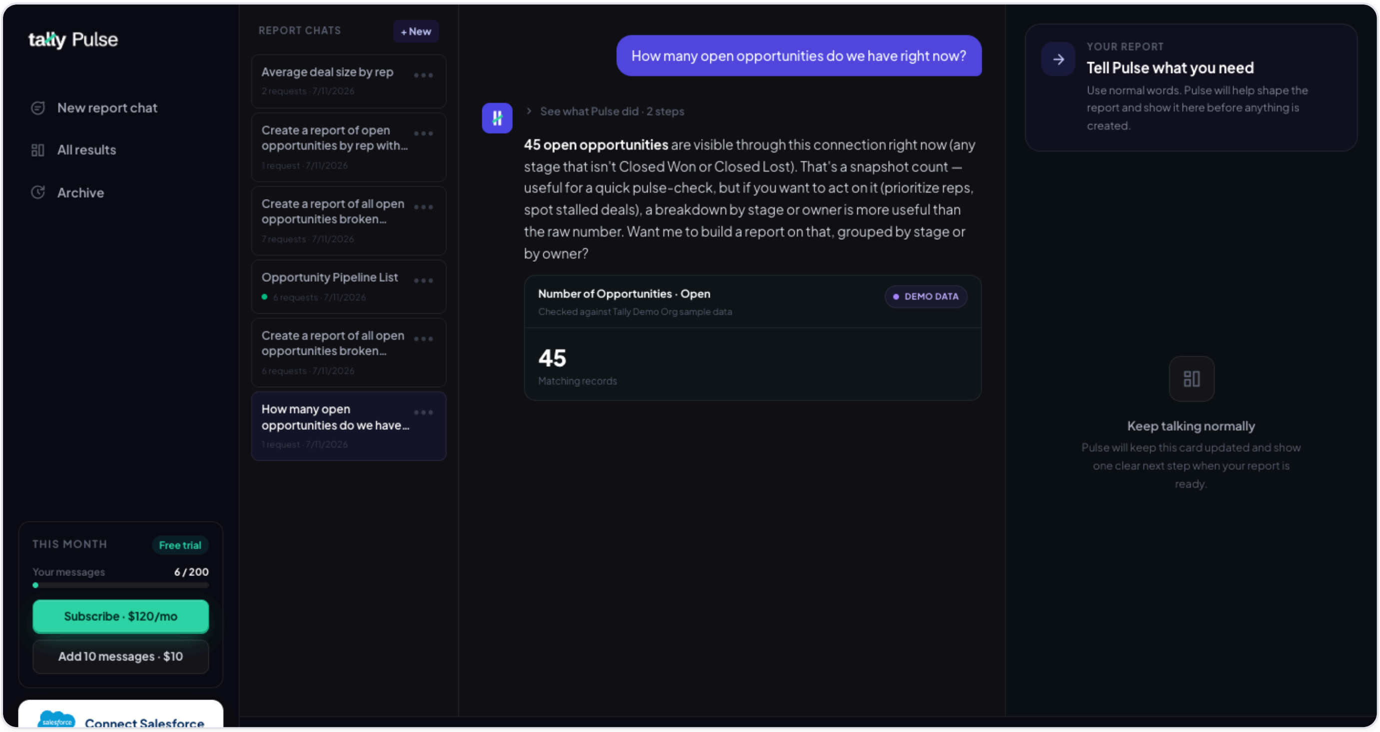
1. Start a report chat

Sign in at pulse.gettally.io and click **New report chat**. You can start from scratch or improve a report your team already uses — Pulse finds existing reports by name and opens them beside the chat.



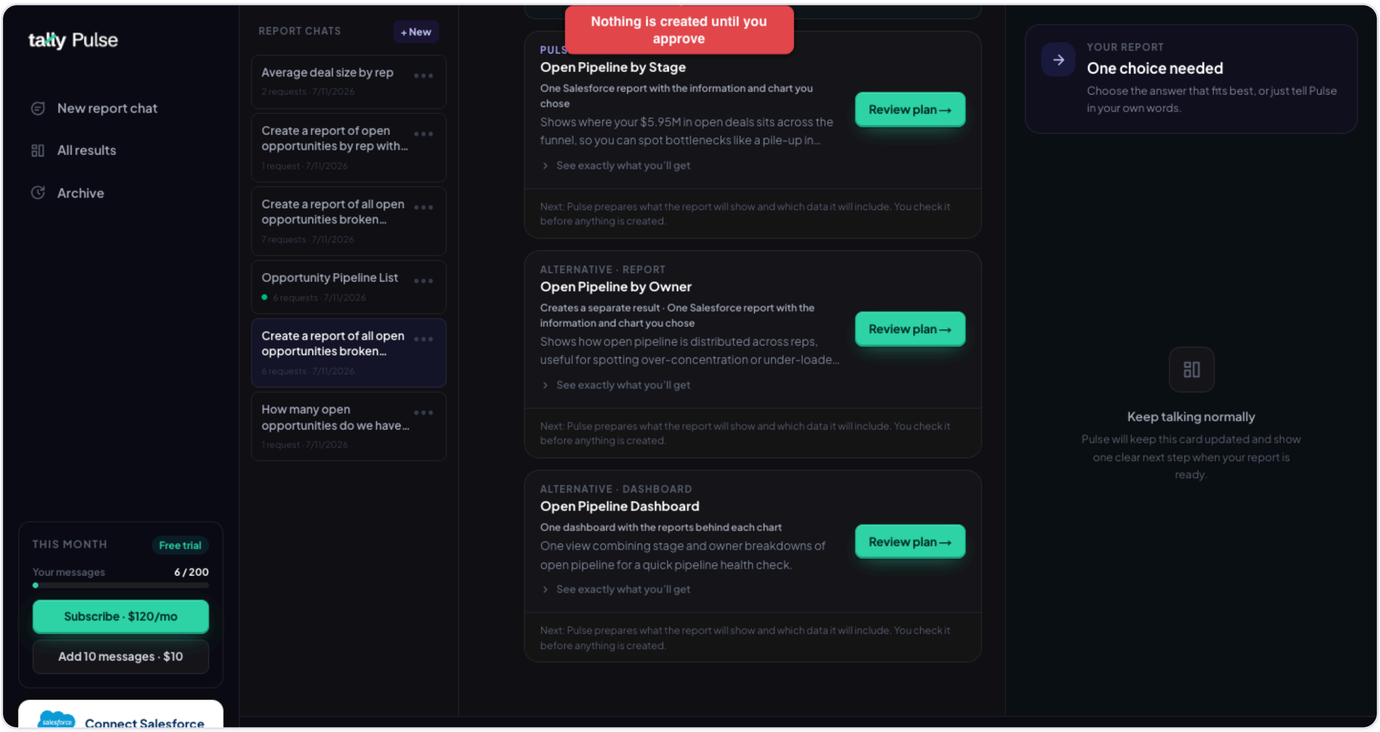
2. Ask in plain English

Type your question the way you'd ask a coworker — *"How many open opportunities do we have right now?"* Before proposing anything, Pulse checks your actual data and answers with the real number, so you know any report it builds will match reality. Expand **See what Pulse did** under any answer to see the exact checks it ran.



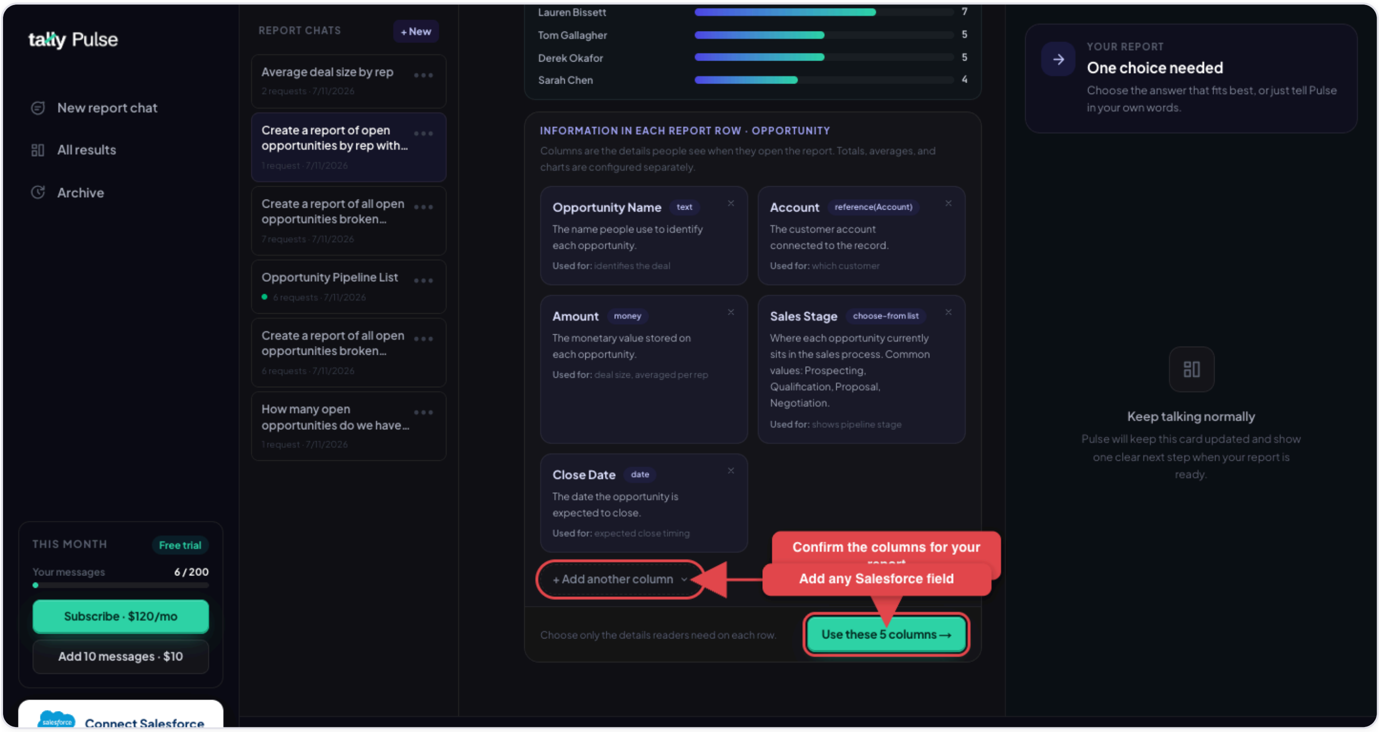
3. Pick from recommended reports

For broader asks, Pulse proposes two or three concrete reports as cards, each naming exactly what it will contain. One card is the **Pulse Pick** — its honest recommendation for your goal. Clicking **Review plan** moves to an exact preview; nothing is created yet.



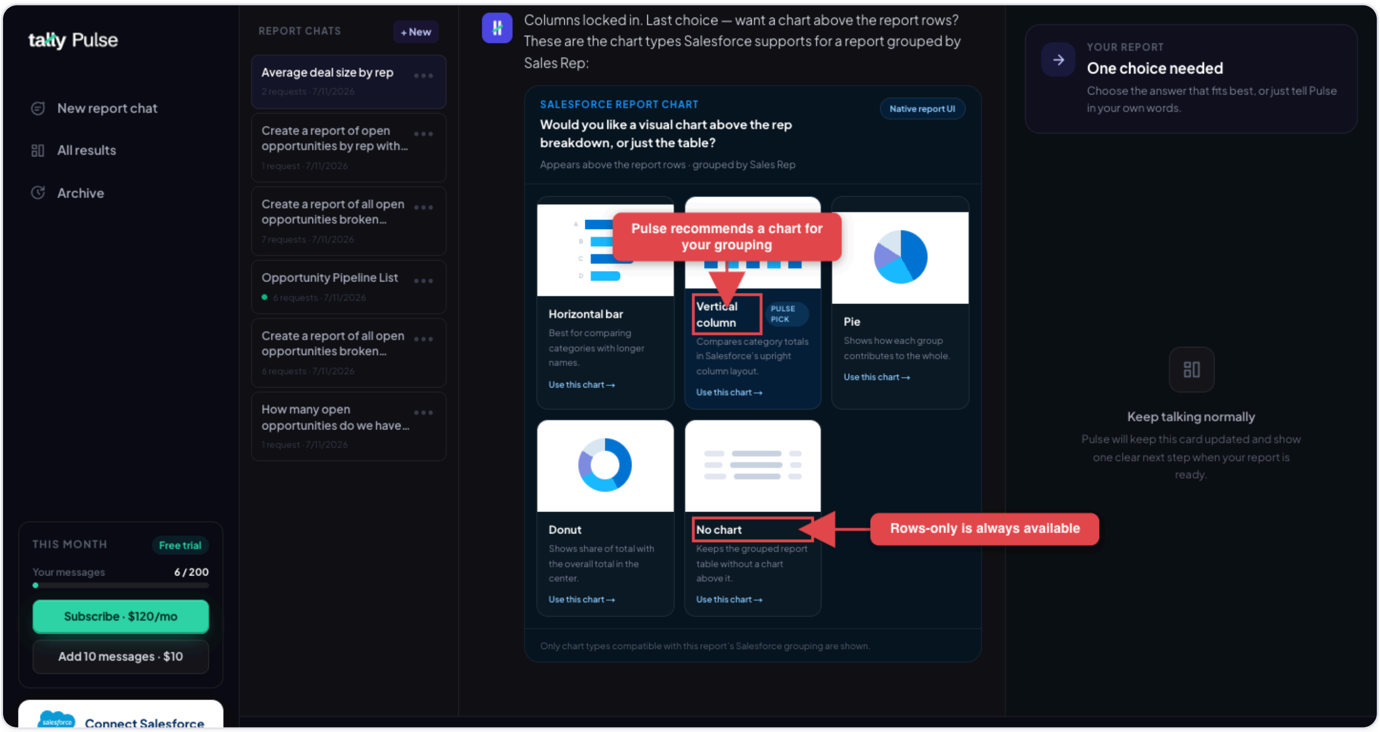
4. Confirm your columns

Pulse proposes the row-level columns and explains what each field means in your org — in business language, not API names. Remove any column with one click, or open **Add another column** to pick from every reportable field on the object.



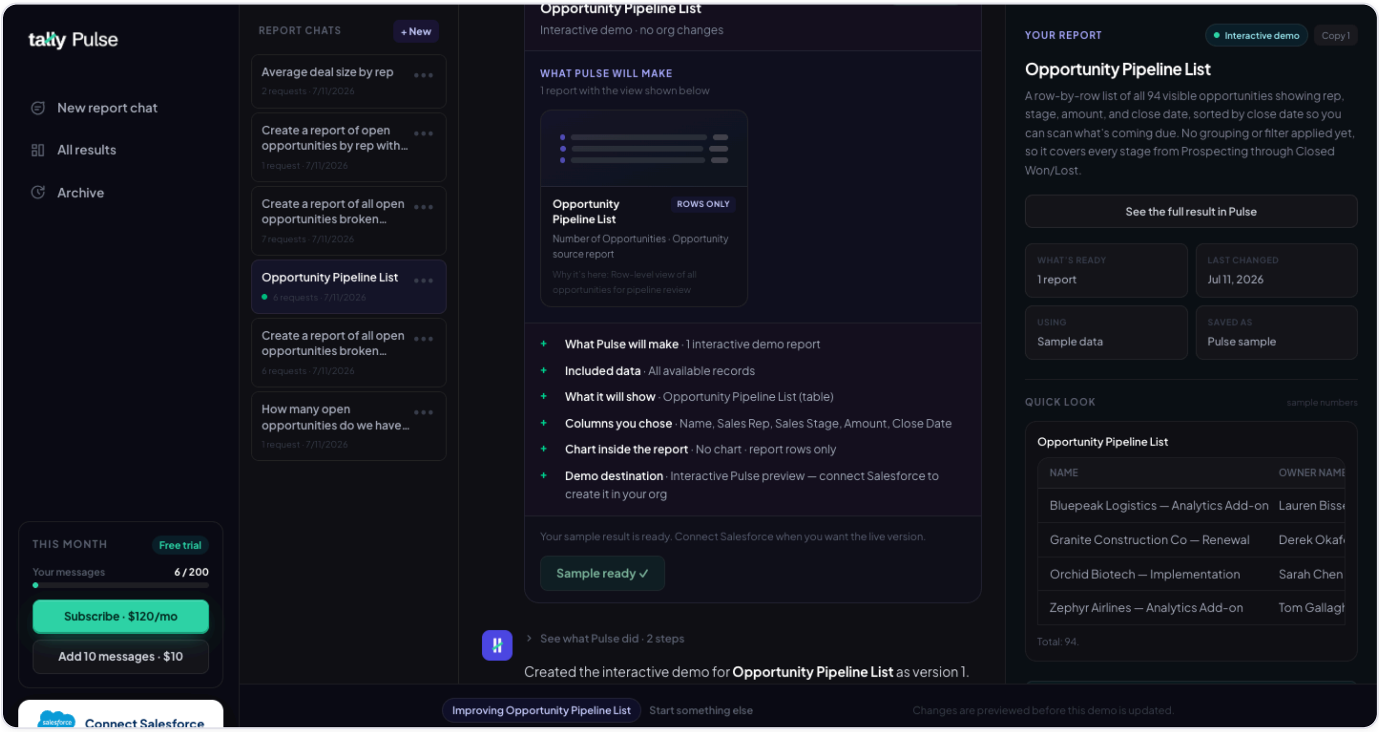
5. Choose the chart inside the report

For grouped reports, Pulse offers only the chart types your Salesforce grouping actually supports — horizontal bar, vertical column, pie, donut, line, or funnel — and recommends one for your data's shape. This chart is embedded in the native Salesforce report itself, right above the rows. "No chart" keeps just the grouped table.



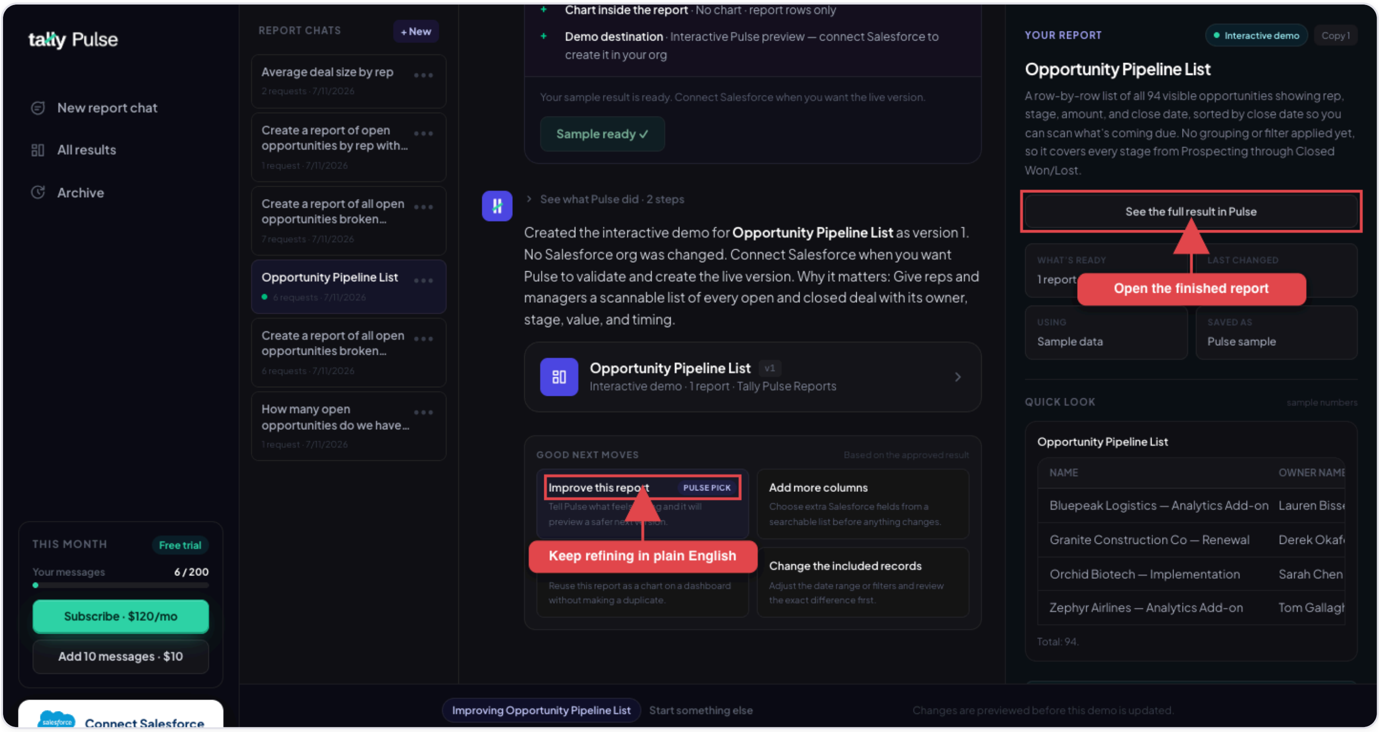
6. Review the blueprint

Before anything is created, Pulse lays out the complete plan: the data included, the columns you confirmed, the chart you chose, the calculations it will add, and the Salesforce folder it will be saved in. What you approve is exactly what gets created — Pulse verifies the saved report against this blueprint after the build.



7. Approve, then keep refining

One click creates the real report, with a direct link to open it in Salesforce. From there every follow-up is a refinement — *"change the date range to last quarter," "add a breakdown by rep," "swap the donut for a bar chart."* Each approved change is saved as a version you can return to, and Pulse suggests good next moves after every build.



Good to know

- **Grounded answers.** Pulse checks real records before recommending anything, and leads with the matched number.
- **Your columns, enforced.** The exact columns you confirm are the columns the report gets — the build is rejected server-side if anything drifts.
- **Native charts.** Report charts are Salesforce-native and live inside the report, so they work for everyone in your org, with or without Pulse.
- **Versioned changes.** Every approved refinement creates a restorable version. You can always go back.
- **Demo mode.** Not connected to Salesforce yet? Pulse builds fully interactive sample results from demo data, and recreates them in your org the moment you connect.

Questions? Open the FAQ at pulse.gettally.io/faq or write to the team from the app.