

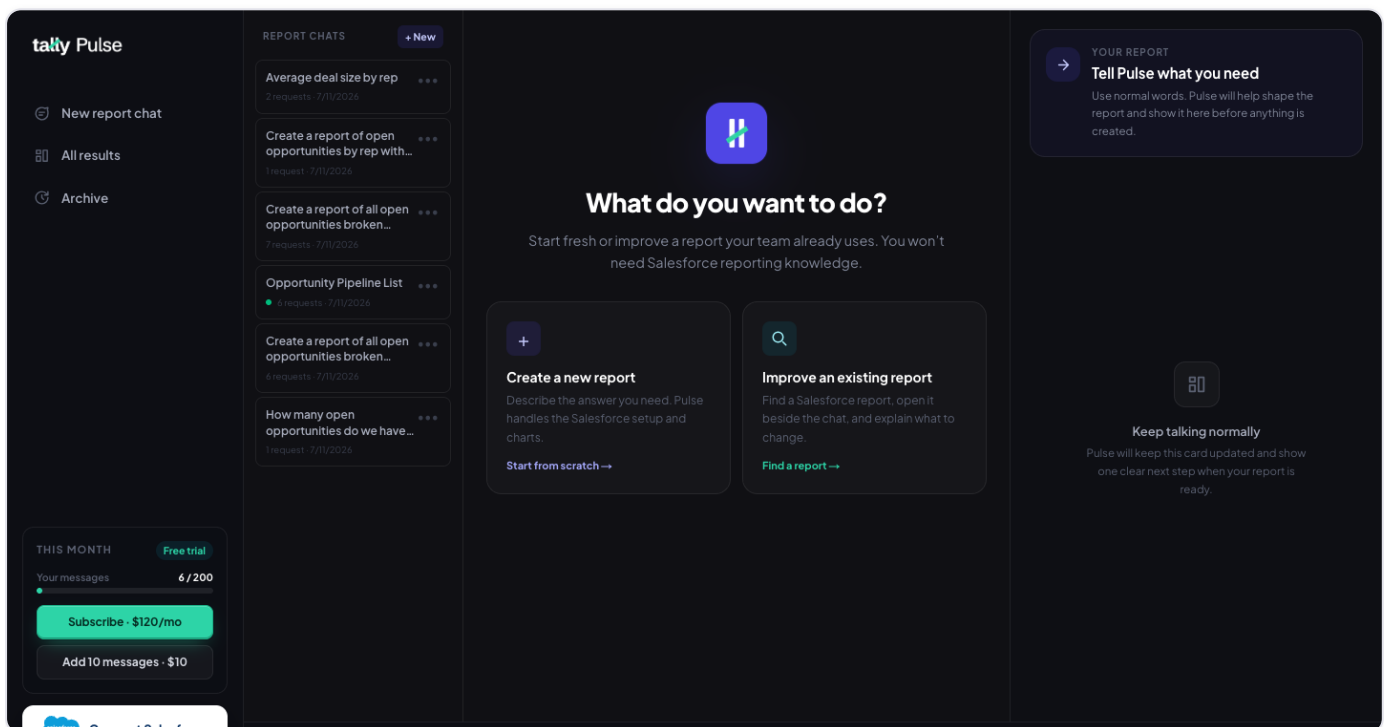
Tally Pulse — Getting Started Guide

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.

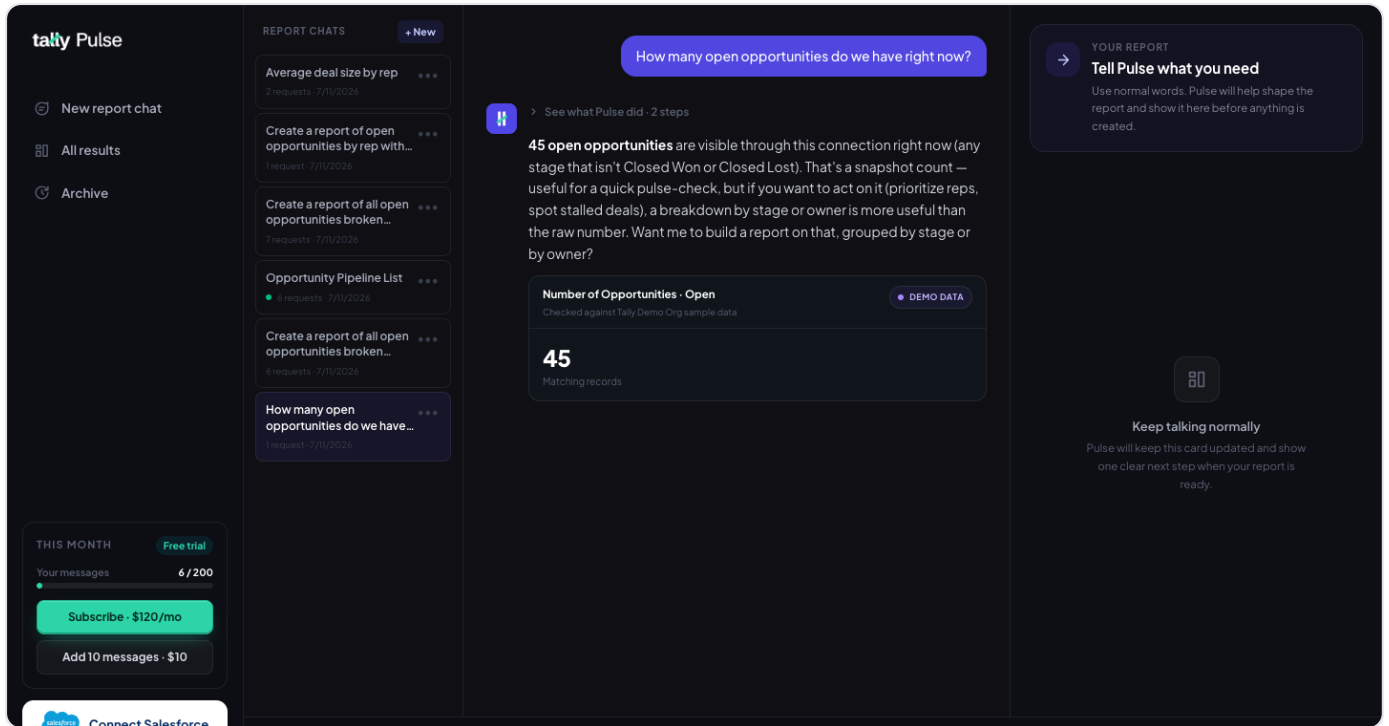
1. Start a report chat

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.



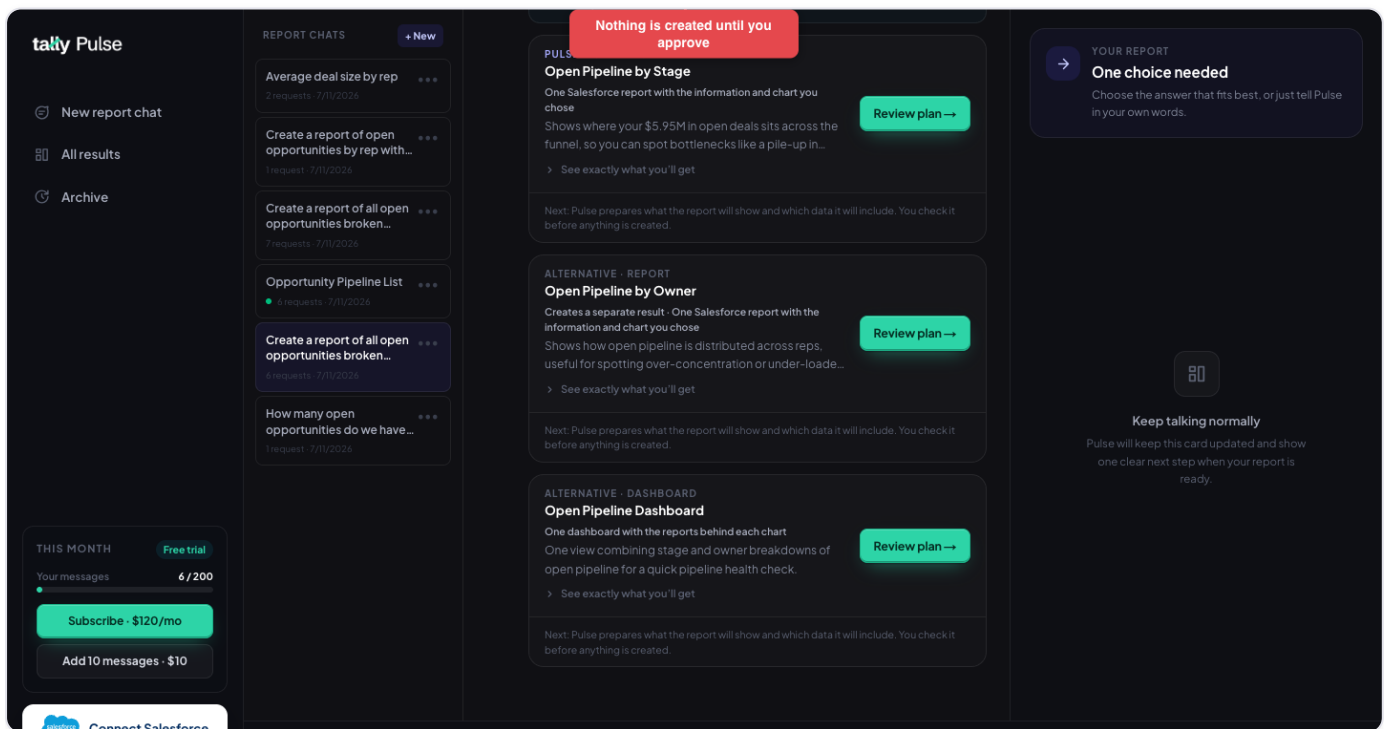
2. Ask in plain English

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.

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REPORT CHATS **+ New**

- Average deal size by rep **...**
2 requests · 7/11/2024
- Create a report of open opportunities by rep with... **...**
1 request · 7/11/2024
- Create a report of all open opportunities broken... **...**
7 requests · 7/11/2024
- Opportunity Pipeline List **...**
6 requests · 7/11/2024
- Create a report of all open opportunities broken... **...**
6 requests · 7/11/2024
- How many open opportunities do we have... **...**
1 request · 7/11/2024

THIS MONTH **Free trial**

Your messages **6 / 200**

Subscribe - \$120/mo

Add 10 messages - \$10

Connect Salesforce

Lauren Bissett **7**

Tom Gallagher **5**

Derek Okafor **5**

Sarah Chen **4**

INFORMATION IN EACH REPORT ROW - OPPORTUNITY
Columns are the details people see when they open the report. Totals, averages, and charts are configured separately.

Opportunity Name **text** **x**
The name people use to identify each opportunity.
Used for: identifies the deal

Account **reference(Account)** **x**
The customer account connected to the record.
Used for: which customer

Amount **money** **x**
The monetary value stored on each opportunity.
Used for: deal size, averaged per rep

Sales Stage **choose-from list** **x**
Where each opportunity currently sits in the sales process. Common values: Prospecting, Qualification, Proposal, Negotiation.
Used for: shows pipeline stage

Close Date **date** **x**
The date the opportunity is expected to close.
Used for: expected close timing

+ Add another column

Confirm the columns for your report
Add any Salesforce field

Use these 5 columns

YOUR REPORT
One choice needed
Choose the answer that fits best, or just tell Pulse in your own words.

Keep talking normally
Pulse will keep this card updated and show one clear next step when your report is ready.

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.

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REPORT CHATS **+ New**

- Average deal size by rep **...**
2 requests · 7/11/2024
- Create a report of open opportunities by rep with... **...**
1 request · 7/11/2024
- Create a report of all open opportunities broken... **...**
7 requests · 7/11/2024
- Opportunity Pipeline List **...**
6 requests · 7/11/2024
- Create a report of all open opportunities broken... **...**
6 requests · 7/11/2024
- How many open opportunities do we have... **...**
1 request · 7/11/2024

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Columns locked in. Last choice — want a chart above the report rows?
These are the chart types Salesforce supports for a report grouped by Sales Rep:

SALESFORCE REPORT CHART **Native report UI**

Would you like a visual chart above the report breakdown, or just the table?
Appears above the report rows - grouped by Sales Rep

Horizontal bar
Best for comparing categories with longer names.
Use this chart →

Vertical column **PULSE PICK**
Compares category totals in Salesforce's upright column layout.
Use this chart →

Pie
Shows how each group contributes to the whole.
Use this chart →

Donut
Shows share of total with the overall total in the center.
Use this chart →

No chart
Keeps the grouped report table without a chart above it.
Use this chart →

Pulse recommends a chart for your grouping

Rows-only is always available

YOUR REPORT
One choice needed
Choose the answer that fits best, or just tell Pulse in your own words.

Keep talking normally
Pulse will keep this card updated and show one clear next step when your report is ready.

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.

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New report chat

All results

Archive

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REPORT CHATS

+ New

Average deal size by rep

2 requests · 7/11/2026

Create a report of open opportunities by rep with...

1 request · 7/11/2026

Create a report of all open opportunities broken...

7 requests · 7/11/2026

Opportunity Pipeline List

8 requests · 7/11/2026

Create a report of all open opportunities broken...

6 requests · 7/11/2026

How many open opportunities do we have...

1 request · 7/11/2026

Opportunity Pipeline List

Interactive demo · no org changes

WHAT PULSE WILL MAKE

1 report with the view shown below

Opportunity Pipeline List

ROWS ONLY

Number of Opportunities · Opportunity source report

Why it's here: Row-level view of all opportunities for pipeline review

+ What Pulse will make

+ Included data

+ What it will show

+ Columns you chose

+ Chart inside the report

+ Demo destination

Your sample result is ready. Connect Salesforce when you want the live version.

Sample ready ✓

See what Pulse did · 2 steps

Created the interactive demo for Opportunity Pipeline List as version 1.

YOUR REPORT

Interactive demo

Copy 1

Opportunity Pipeline List

A row-by-row list of all 94 visible opportunities showing rep, stage, amount, and close date, sorted by close date so you can scan what's coming due. No grouping or filter applied yet, so it covers every stage from Prospecting through Closed Won/Lost.

See the full result in Pulse

WHAT'S READY

1 report

LAST CHANGED

Jul 11, 2026

USING

Sample data

SAVED AS

Pulse sample

QUICK LOOK

sample numbers

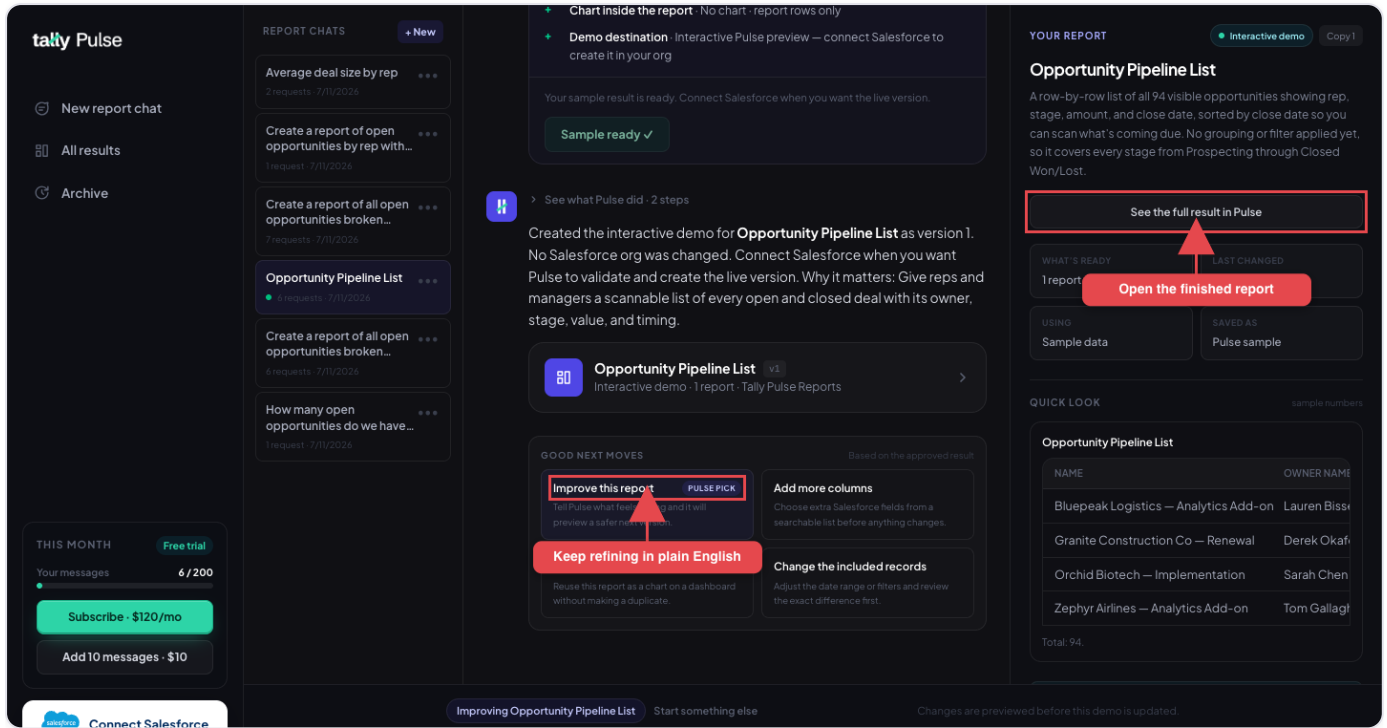
Opportunity Pipeline List

NAME	OWNER NAME
Bluepeak Logistics — Analytics Add-on	Lauren Biss...
Granite Construction Co — Renewal	Derek Okaf...
Orchid Biotech — Implementation	Sarah Chen
Zephyr Airlines — Analytics Add-on	Tom Gallag...

Total: 94.

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.