PULSE DASHBOARD™
REALTIME DATA MANAGEMENT SUITE

Take charge of your business with PULSE Dashboard Software

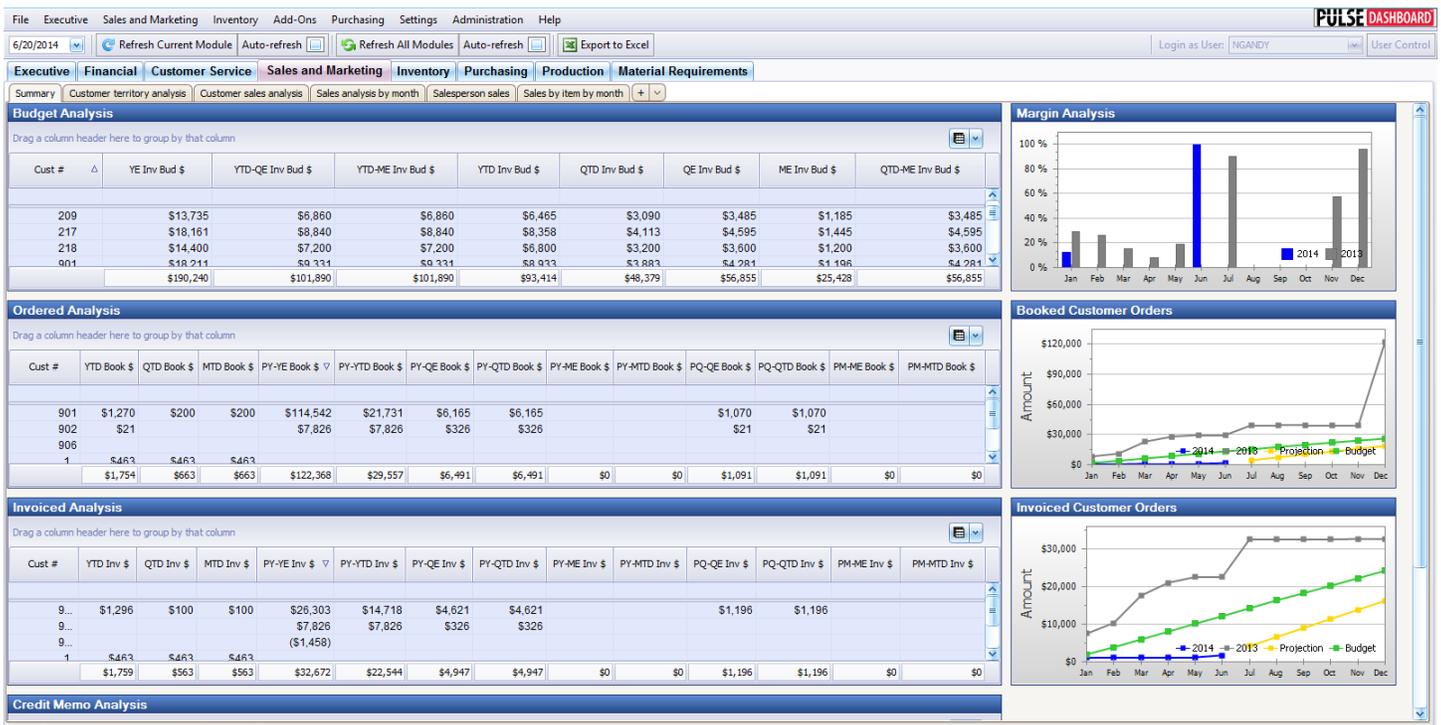# <u>Sales & Marketing Module</u>

PULSE DASHBOARD is revolutionary software that lets you leverage your Macola® investment in a new way —with real-time display of vital business metrics, and detailed analysis with the click of a mouse. You will be able to track critical factors for your business, on-screen and real-time. Other PULSE modules include Executive, Financial, Customer Service, Inventory, Purchasing, Production and Material Requirements.

PULSE Dashboard adds value to your Macola® investment

- Manage with real-time data, on-screen, company-wide, all the time
- Inconsistencies between reports from different departments are eliminated
- Important metrics not found in standard Macola® software
- One-click drill-down to view details & One-click report writer generates custom reports
- Export all charts and reports to Excel/printer/PDF/e-mail
- Installation & training in an afternoon

PULSE Sales & Marketing gives you capabilities not available elsewhere

- The ability to track sales by any metric (ex. customer, customer type, item number, product category, product line, salesperson, outside distributors, territories, user defined)
- The ability to assign a forecast/budget to any of the sales metrics you are tracking
- Easily and quickly create sales budgets or adjust existing budgets at any time
- Track sales versus forecast for MTD, QTD, YTD and Prior Year
- Track sales versus forecast based on dollars or percentages
- Drill-down into any metric to view open customer orders, booked orders or invoiced orders
- The PULSE Column Chooser allows you to select just the columns you want to display
- Sort and/or filter on any column
- Anything you see on the screen can be exported to Excel or PDF, printed or e-mailed

The PULSE Sales & Marketing module lets you track sales performance

As an example, several categories of products are sold and the need is to know which product categories contribute the highest gross margin. Use PULSE for analysis to view this information by sorting the report based on YTD sales dollars by Product Category.

Sales by Product Category

Drag a column header here to group by that column

Prod Cat	QTD Sales $	QTD Margin $	YTD Sales $ ▽	YTD Margin $	YTD Margin %	Prior Year YE Sales $	Prior Year YE Margin $	Prior Year YE Margin %
SUM	$2,233,231	$1,358,495	$8,026,493	$6,491,926	81 %	$8,295,850	$5,044,321	61 %
IMP	$1,900,875	$1,605,822	$4,340,056	$4,032,997	93 %	$4,813,663	$4,488,382	93 %
FRA	$0	$0	$98,925	$98,925	100 %	$12,474	$12,474	100 %
FAB	$11,308	($534)	$50,825	$10,601	21 %	$30,994	$8,549	28 %
	$0	$0	$1,931	$1,931	100 %	$15	$15	100 %
FRT	$5	$5	$5	$5	100 %	$0	$0	
CSE	$0	$0	$0	$0		$7,536	$2,917	39 %
PW	$0	$0	$0	$0		$0	$0	
	$4,145,419	$2,963,789	$12,518,235	$10,636,384		$13,160,532	$9,556,658	

PULSE Dashboard tracks sales data by quantity, by revenue, by month, for this year and last year. Then it is just a matter of deciding how to view the information. Pulse Dashboard allows you to quickly and easily change or copy the report listing the information by Customer, Salesperson, Territory or many other parameters by simply changing the columns shown on the report.

In addition to over 600 possible columns from Macola®, over 600 additional calculated columns are available to add to the Sales Analysis Report to track variances by quantity or value for the current year and last year month/quarter/year to date and month/quarter/year end.

Adding a filter to a tab allows the User to create lookups to show multiple reports for Customers, Items, Salespeople, Product Categories or even User Defined Fields quickly and easily.

The PULSE Sales & Marketing module lets you create sales budgets.

Many ERP systems do not have the ability to add sales budget information to be used in sales analysis reporting to show variances between actual sales and what was forecast/budgeted for the year. PULSE Dashboard has included an easy to use, but very powerful forecast or budgeting screen. Multiple budgets may be entered per year if needed. Budgets may be created by using the actual values from a previous year as a basis and copying that in to the screen and then adjusting that by a percentage up or down. As many companies prepare sales budgets in Excel, have PULSE Dashboard create an template to import the budget. The budget may also be manually entered. During the year or in subsequent years, you can adjust your budget based on a dollar amount or percentage.

Each annual budget is entered by month created for Customer, Salesperson, Item, Customer and Item, Customer and Item and Alt Address, Item and Location or Salesperson and Item. Each month may use Sales Dollars, Sales Units, Average Selling Price or Margin. Up to 2 of these budgets may then be assigned to each Sales Analysis report as a comparative to actuals for the year.

Sales Analysis Budget Setup

Fiscal Year: 2014   Budget Scenario: Default   Manage Budget Scenarios

☐ Lock Periods   01, 02, 03, 04, 05

Create from History | Import From Excel | Make Adjustments | View Exceptions

Update Budget

Adjust Sales Budget $: $0   0 %   Target Sales Budget $: $190,240
Adjust Sales Budget Units: 0   0 %   Target Sales Budget Units: 0
Adjust Margin Budget $: $0   0 %   Target Margin Budget $: $0

Period Distribution %

◉ Distribute Proportionally
○ Distribute Equaly
○ Use Custom Distribution

Period	Sales %	Margin %
1	8 %	8 %
2	8 %	8 %
3	8 %	8 %
4	8 %	8 %
5	8 %	8 %
6	8 %	8 %
7	8 %	8 %
8	8 %	8 %
9	8 %	8 %
10	8 %	8 %
11	8 %	8 %
12	8 %	8 %

Customer Entry | Salesperson Entry | Item Entry | Customer and Item Entry | Customer, Alt Addr, Item # Entry | Item and Loc Entry | Salesperson and Item Entry

Budget by Customer

	Cust #	Sales Budget 2014-Jan	Sales Budget 2014-Feb	Sales Budget 2014-Mar	Sales Budget 2014-Apr	Sales Budget 2014-May	Sales Budget 2014-Jun	Sales Budget 2014-Jul	Sales Budget 2014-Aug	Sales Budget 2014-Sep	Sales Budget 2014-Oct	Sales Budget 2014-Nov	Sales Budget 2014-Dec	Sales Budget Total $	Sales Units 2014-Jan	Sales Units 2014-Feb
1	1	$1,000.00	$1,100.00	$1,225.00	$1,175.00	$1,200.00	$1,250.00	$1,190.00	$1,152.00	$1,075.00	$1,050.00	$1,135.00	$1,200.00	$13,752.00	0.00	0.00
2	2	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
3	3	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
4	4	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
5	209	$1,200.00	$1,125.00	$1,050.00	$1,075.00	$1,225.00	$1,185.00	$1,250.00	$1,200.00	$1,225.00	$1,075.00	$1,125.00	$1,000.00	$13,735.00	0.00	0.00
6	210	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
7	211	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
8	212	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
9	213	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
10	214	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0.00	0.00
11	217	$1,400.00	$1,450.00	$1,395.00	$1,500.00	$1,650.00	$1,445.00	$1,196.00	$1,520.00	$1,575.00	$1,650.00	$1,600.00	$1,780.00	$18,161.00	0.00	0.00
12	218	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$1,200.00	$14,400.00	0.00	0.00
13	901	$1,800.00	$1,600.00	$1,650.00	$1,575.00	$1,510.00	$1,196.40	$1,435.00	$1,700.00	$1,500.00	$1,395.00	$1,450.00	$1,400.00	$18,211.40	0.00	0.00
14	902	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$1,300.00	$15,600.00	0.00	0.00
15	903	$1,400.00	$1,450.00	$1,395.00	$1,500.00	$1,650.00	$1,445.00	$1,196.00	$1,520.00	$1,575.00	$1,650.00	$1,600.00	$1,780.00	$18,161.00	0.00	0.00

Example of a simple Budget Report

Budget Analysis

Drag a column header here to group by that column

Cust # △	YE Inv Bud $	YTD-QE Inv Bud $	YTD-ME Inv Bud $	YTD Inv Bud $	QTD Inv Bud $	QE Inv Bud $	ME Inv Bud $	QTD-ME Inv Bud $
1	$13,752	$6,950	$6,950	$6,533	$3,208	$3,625	$1,250	$3,625
209	$13,735	$6,860	$6,860	$6,465	$3,090	$3,485	$1,185	$3,485
901	$18,211	$9,331	$9,331	$8,933	$3,883	$4,281	$1,196	$4,281
902	$15,600	$7,800	$7,800	$7,367	$3,467	$3,900	$1,300	$3,900
903	$18,161	$8,840	$8,840	$8,358	$4,113	$4,595	$1,445	$4,595
904	$25,055	$18,280	$18,280	$14,087	$10,762	$14,955	$12,580	$14,955
905	$18,211	$9,331	$9,331	$8,933	$3,883	$4,281	$1,196	$4,281
906	$2,757	$2,757	$2,757	$2,757	$1,457	$1,457	$0	$1,457
907	$14,035	$6,860	$6,860	$6,465	$3,090	$3,485	$1,185	$3,485
908	$18,161	$8,840	$8,840	$8,358	$4,113	$4,595	$1,445	$4,595
	$157,679	$85,850	$85,850	$78,256	$41,066	$48,660	$22,783	$48,660

The PULSE Sales & Marketing module tracks performance versus budget with drill-down

Information on many PULSE Dashboard reports may show a summarized value to allow the User to see the "big picture" but the detailed information may need to be seen as well. By clicking on a value to drilldown on it additional detail may be seen and the drilldown reports may be tailored to see the information needed.

YTD Margin Analysis by Customer

Drag a column header here to group by that column

Cust # △	Cust Name	MTD Inv $	MTD Margin $	MTD Margin %	YTD Inv $	YTD Margin $	YTD Margin %	YTD Inv Bud $	(YTD Inv $) vs (YTD Bud $) Var %	YE Inv Bud $
1	Foreign	$463	$462	100 %	$463	$462	100 %	$6,533	-93 %	$13,752
209	Bike O'Rama							$6,465	-100 %	$13,735
901	Outdoor Adventure Outlet	$100	$98	98 %	$1,296	$247	19 %	$8,933	-85 %	$18,211
902	Bike O'Rama							$7,367	-100 %	$15,600
903	Dirtworld.com Online Bike Store							$8,358	-100 %	$18,161
904	Cycle Scene							$14,087	-100 %	$25,055
905	Village Bike Shop							$8,933	-100 %	$18,211
906	Bicycle Stop							$2,757	-100 %	$2,757
907	Family Bike Shop							$6,465	-100 %	$14,035
908	Island Bike Trail							$8,358	-100 %	$18,161
		$563	$560		$1,759	$709		$78,256		$157,679

YTD Margin Analysis by Customer

Cust # = 901 AND Cust Name = Outdoor Adventure Outlet ☒

Cust # = 901 AND Cust Name = Outdoor Adventure Outlet

Drag a column header here to group by that column

Cust #	Cust Name	MTD Inv $	MTD Margin $	MTD Margin %	YTD Inv $	YTD Margin $	YTD Mar
901	Outdoor Adventure Outlet	$100	$98	98 %	$1,296	$247	
		$100	$98		$1,296	$247	

(Cust # = 901 AND Cust Name = Outdoor Adventure Outlet) AND Cust # = 901 AND Cust Name = Outdoor Adventure Outlet

Drag a column header here to group by that column

Inv #	Item #	Item Desc 1	MTD Inv Qty	MTD Inv $	MTD Margin %	PY-MTD Inv $	PY-YE Margin %
223	BCABLE	CABLE FOR BRAKES 1	2	$100	98 %		

Please call our PULSE support desk us with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

We encourage your phone calls with suggestions for making our software work better for your organization. We also offer custom modifications, but if your suggestions will be applicable to other users, they are made at no charge.

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