

## Sales Order Web Portal with Real-Time Coordination

### Improve customer, sales representative, and distributor collaboration with a robust web portal system:

- Manage customer sales orders faster
- Monitor real-time sales order status
- Communicate shipping tracking numbers
- Share price lists and inventory availability
- Eliminate endless email chains and voicemails

The **PULSE Sales Order Web Portal** provides real-time collaboration with your customers, sales reps, and distributors using notes, documents, emails, and reports. The system is web-based, so it will work from any location and is always up-to-date. The portal is fully integrated with your Macola® ERP software, so you can start using it immediately. Traditionally, customers, outside sales reps, and distributors have to contact your internal team to obtain updated order status, pricing, inventory availability, shipping tracking numbers, etc.

### The PULSE Sales Order Web Portal puts your customers, sales personnel, independent reps, and distributors to work for you.

- Customers, sales reps, and distributors can enter their own sales orders.
- Instant notification when an order ship or a ship date is changed.
- Tracking numbers are available online to reduce phone calls.
- New sales orders can be put on hold pending internal review and approval.

### Dashboard and reports

Create custom dashboard reports using your unique user-defined searches or use existing reports. Design the display of fields, add or remove columns, filter, sort, and group by any data field.

#### Sales Order Report Menu:

Status Group	
Name	Count
Open Sales Orders	145
Invoiced Sales Orders	216
Lost Sales Quotes	6
Converted Quotes	2
Open Quotes	3

## List of open orders:

### Open Sales Orders

Drag a column header and drop it here to group by that column

Compare Columns Relative Dates Save This Search Open Sales Orders Export to Excel

Order #	OrderType	OrderStatus	Order Date	Customer #	Bill To Name	Entered Date	Email Address	Grand Total	View Date
	Order	Booked	03/17/2016	428	DAIMLRICA LLC	03/17/2016		\$0.00	
2	Blanket	32	09/06/2018	908	Island Bike Trail	09/06/2018	sales@ibt.com	\$20,554.00	
6	Order	Booked	12/08/2016	907	Family Bike Shop	12/08/2016	Jhuston@familybike.c...	\$799.50	
13	Quote	Booked	04/18/2017	901	Outdoor Adventure Outlet	04/18/2017	CSchenk@outdoorou...	\$216.84	
14	Quote	Booked	04/27/2017	908	Island Bike Trail	04/27/2017	sales@ibt.com	\$824.25	
16	Quote	Booked	01/23/2018	902	Agency Name	01/23/2018	SGeorge@BOR.com	\$420.00	
81	Order	PickTicketPrinted	06/16/2008	901	Outdoor Adventure Outlet	06/16/2008	CSchenk@outdoorou...	\$1,491.31	
97	Order	32	01/24/2012	901	Outdoor Adventure Outlet	01/24/2012	CSchenk@outdoorou...	\$0.00	

## Screen for keying in orders:

### Open Sales Order Create

**Company**  
Test Company  
asdfsadf  
Cincinnati OH 45202  
US

**Customer**  
Outdoor Adventure Outlet  
Customer # 901

**Bill To**  
Outdoor Adventure Outlet  
786 Vendevue Blvd.  
PO Box 786 dodada  
Phoenix AZ  
US

Order Number

**Ship To**  
Outdoor Adventure Outlet  
593 Clark Drive  
Building 1  
Phoenix AZ  
US





Line #	Item #	Item Descripti...	Item Descripti...	Request Date	Promise Date	Qty Ordered	Unit Price	Unit Cost	Line Total
2	BOLT	BOLT 2 1/2" Stainl	Used on Sport Bik	1/7/2022	1/7/2022	100.00	\$0.50	\$0.25	\$25.0000
1	BRACKETS	BRACKETS FOR		1/7/2022	1/7/2022	10.00	\$10.50	\$0.50	\$5.0000

## Collaborate and Communicate

Sales orders are all in one place. You can share documents, review and accept changes, correspond with customers/salespersons/distributors. All sales order changes are tracked and can be viewed by all. Receive an automated text or email for important events such as date or price changes, approvals, new notes, etc.

## Integrated Notes Engine

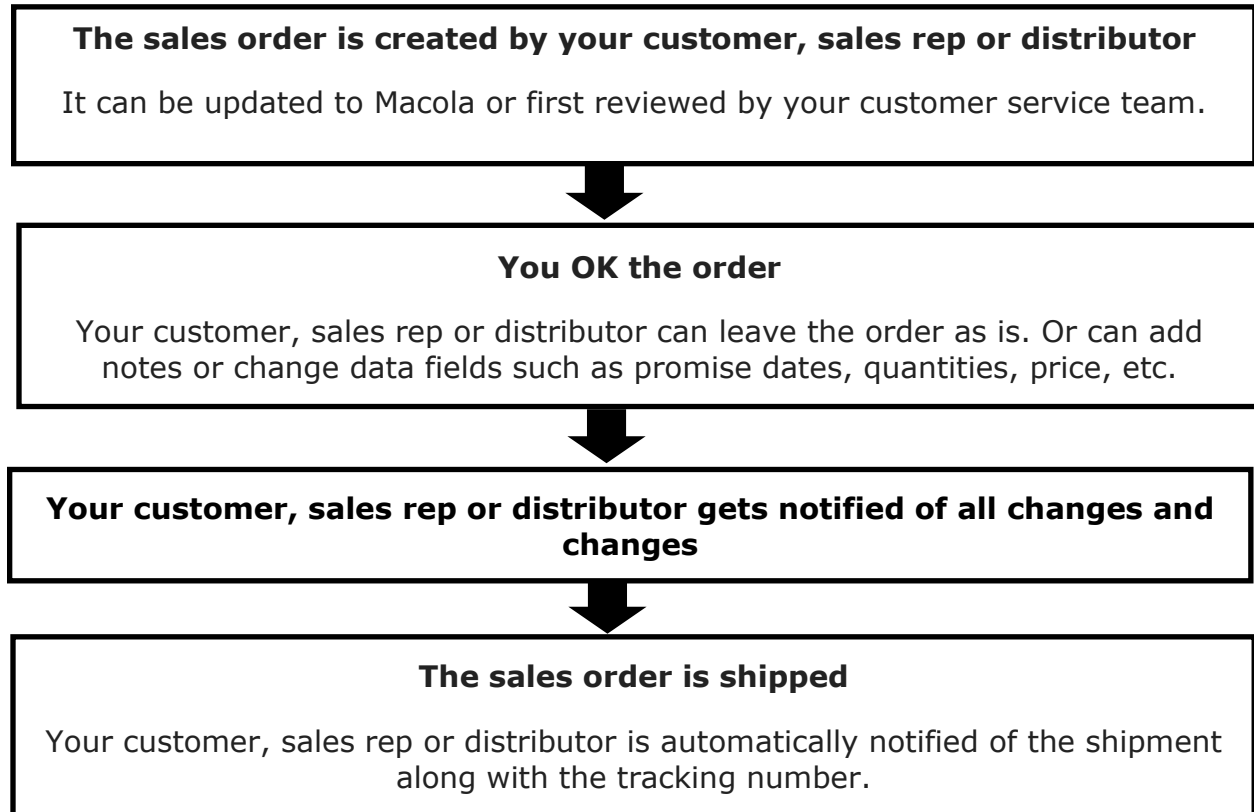
Provides a convenient space for sharing notes regarding a specific order.

	<b>Suzie Supplier (Supplier) 08/16/2017 06:52 PM</b> I changed back the original date
	<b>Johnny Customer (Customer) 08/16/2017 06:48 PM</b> I have confirmed delivery dates with my customers - you cant delay this order!
	<b>Suzie Supplier (Supplier) 08/16/2017 06:42 PM</b> Yes, we had to push back the deliver date due to a shortage of warehouse staff.
	<b>Johnny Customer (Customer) 08/16/2017 06:39 PM</b> I noticed that you changed the promise date 2 weeks later- this is not acceptable.

## Security and Control

By user, you can control read/write permissions for any sales order data field and how each field is displayed. Add restrictions to processes for regulated industries, like chemical and food manufacturers. You can also control which data fields are viewable and which can be modified (promise date, price, quantity, etc.). Modified data fields are optionally real-time updated to your Macola® database.

## Sales Order System Flow



## What does it cost, and what is included?

Please refer to our price list. The first four hours of customizations are included in the price of the software. Additional customizations to meet your unique needs, testing, training, and implementation assistance are invoiced separately. Our annual maintenance and support fee includes unlimited training, support calls, and software updates.

**For more information or a demonstration, call (513) 723-8091 or [Sales@LeahyConsulting.com](mailto:Sales@LeahyConsulting.com) or visit [www.PulseDashboard.com](http://www.PulseDashboard.com)**

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