

Take charge of your business with PULSE Dashboard & Analytics Software

Customer Service & Shipping Module

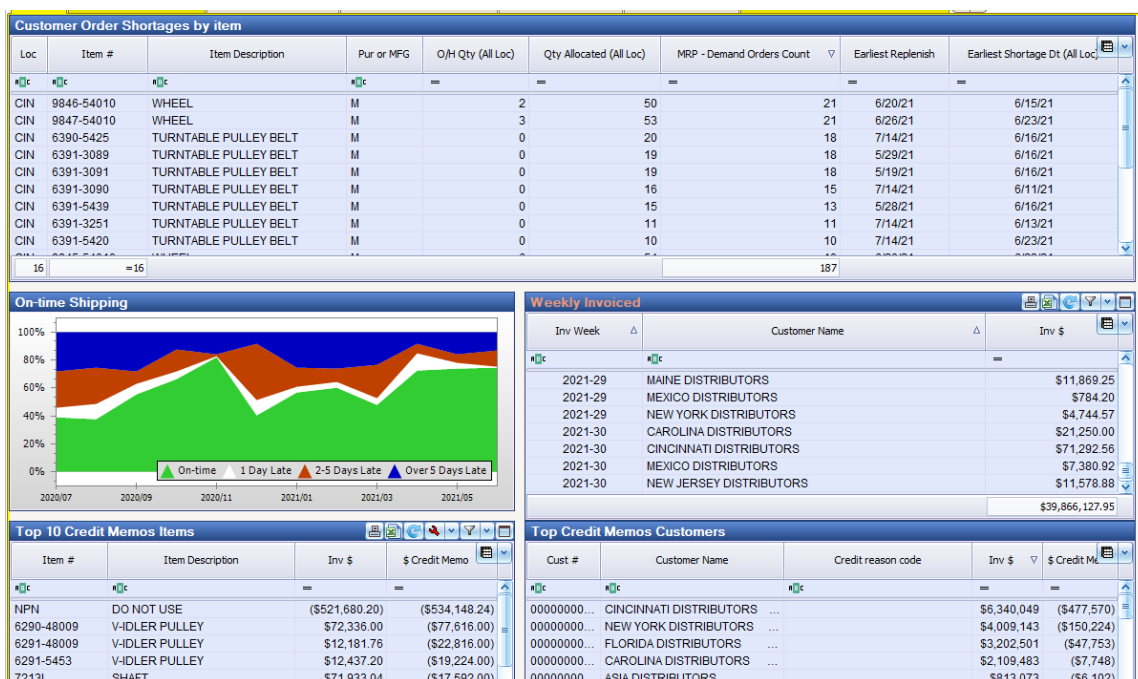
PULSE DASHBOARD is revolutionary software that lets you leverage your Macola® investment in a new way —with a real-time display of vital business metrics and detailed analysis with the click of a mouse. You can track critical factors for your business on-screen and in real time. Other PULSE Dashboard modules include Executive, Financial, Sales and Marketing, Inventory, Purchasing, Production, and MRP.

PULSE Dashboard & Analytics adds value to your Macola® investment

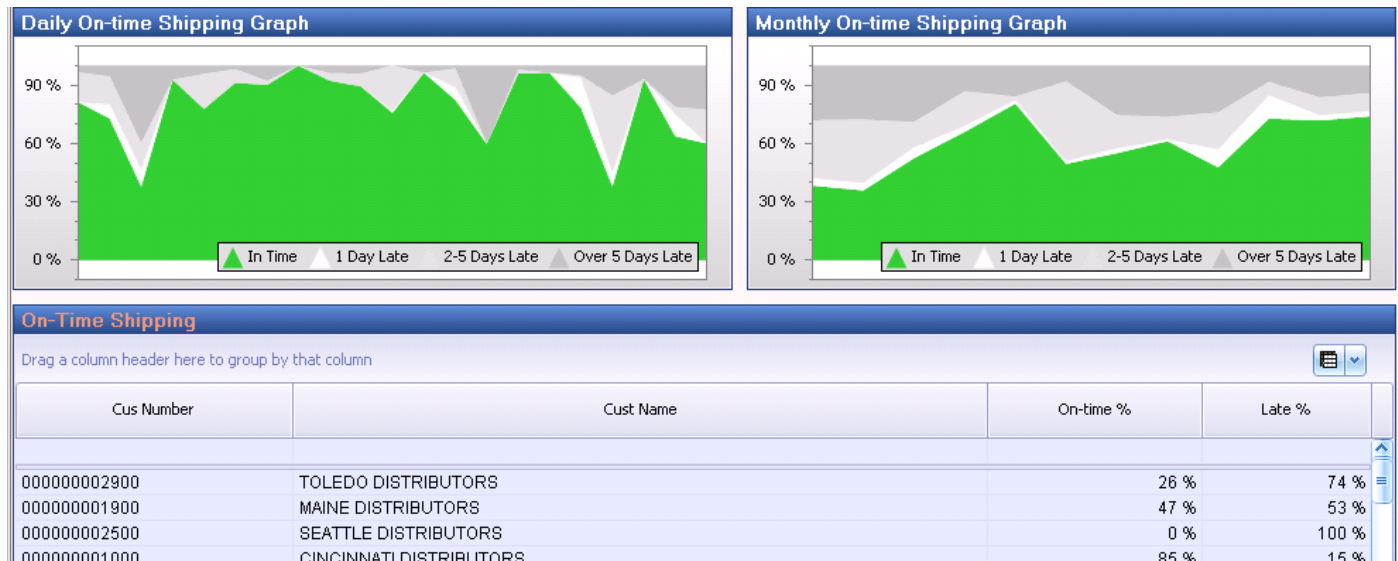
- Manage with real-time data, on-screen, company-wide, all the time
- Important metrics not found in standard Macola® software
- One-click drill-down to view the underlying details
- One-click report writer to select the report columns you need
- Export all data to Excel/printer/PDF/e-mail
- Installation & training in an afternoon

PULSE Customer Service gives you capabilities not available elsewhere

- On-time Shipping Graph
- Finished Good Items Causing Shortages –Pinpoint customer orders that cannot be shipped on time based on due dates for customer orders, production orders, and purchase orders.
- Top Credit Memo Customers and Items



PULSE Customer Service Measures On-time Shipping



PULSE Customer Service Summarizes by Customer by Period

Using the Customer Order Dynamic View, detailed reports can be created to show many levels of detail for unshipped or invoiced orders. This can be by Item, Customer, Product Category, Salesperson, Period, etc.

Customer Orders Dynamic View										
Inv Year	OE Order #	Ord Dt	Request Date	Cust #	Customer Name	Customer State	Item #	Item Description	Ord Qty	Order Total \$
2019	00122134	3/22/19	2019-06	000000001900	MAINE DISTRIBUTORS	PA	8001...	MOTOR	58	\$3,248.00
2019	00122134	3/22/19	2019-06	000000001900	MAINE DISTRIBUTORS	PA	8001...	MOTOR	11	\$616.00
2019	00122134	3/22/19	2019-06	000000001900	MAINE DISTRIBUTORS	PA	8001...	MOTOR	24	\$1,344.00
2019	00123038	3/29/19	2019-07	000000001100	NEW YORK DISTRIBUTORS	OH	9638...	MOTOR	100	\$2,456.00
2019	00124509	4/6/19	2019-06	000000001400	MEXICO DISTRIBUTORS	OH	9727...	BELT	70	\$1,221.50
2019	00127581	4/20/19	2019-06	000000001000	CINCINNATI DISTRIBUTORS	CA	6211...	PRODUCT LINE TRUCK	18	\$1,422.00
2019	00127579	4/20/19	2019-06	000000001000	CINCINNATI DISTRIBUTORS	CA	6219...	PRODUCT LINE TRUCK	8	\$1,696.00

PULSE Tracks Credit Memos by Customer and Item

Credit memos can indicate if your customer is ordering the wrong product, if you are shipping the wrong product, if the product is damaged in shipping, if your customer is damaging the product, etc. You can drill down to view or print the details.

Top Credit Memos Customers					
	Cus Number	Cust Name	Ord \$	Inv \$	\$ Credit Memo
1	000000001900	MAINE DISTRIBUTORS	\$318,327.90	\$318,183.93	(\$5,127.70)
2	000000001500	ASIA DISTRIBUTORS	\$813,293.46	\$813,073.10	(\$6,101.52)
3	000000001700	CANADA DISTRIBUTORS	\$519,683.37	\$519,683.37	(\$6,160.00)
4	000000002300	CHICAGO DISTRIBUTORS	\$194,026.21	\$194,026.21	(\$6,807.23)
5	000000001200	CAROLINA DISTRIBUTORS	\$2,109,580.47	\$2,109,482.70	(\$7,747.62)
6	000000001600	CALIFORNIA DISTRIBUTORS	\$243,624.10	\$241,849.46	(\$40,675.21)
7	000000001800	NEW JERSEY DISTRIBUTORS	\$426,102.40	\$425,657.40	(\$41,545.52)
8	000000001300	FLORIDA DISTRIBUTORS	\$3,265,868.34	\$3,221,328.94	(\$47,753.16)
9	000000001100	NEW YORK DISTRIBUTORS	\$4,010,699.06	\$4,009,143.18	(\$150,223.62)
10	000000001000	CINCINNATI DISTRIBUTORS	\$6,666,076.56	\$6,606,966.00	(\$481,571.21)
			\$18,567,281.87	\$18,459,394.29	(\$793,712.79)

Top Credit Memos Items					
	Item #	Item Description 1	Ord \$	Inv \$	\$ Credit Memo
1	8010-C544	MOTOR	\$3,937.20	\$3,937.20	(\$9,257.82)
2	8058-3235	MOTOR	\$9,612.00	\$9,167.00	(\$9,612.00)
3	72171	SHAFT	\$86,949.60	\$86,949.60	(\$10,184.28)
4	2360-C885	WHEEL PROTECTOR	\$104,864.00	\$98,423.00	(\$12,678.60)
5	6786-F802	HOUSING	\$13,427.50	\$13,427.50	(\$13,755.00)
6	72131	SHAFT	\$71,933.04	\$71,933.04	(\$17,592.00)
7	6291-5453	V-IDLER PULLEY	\$16,405.20	\$12,437.20	(\$19,224.00)
8	6291-48009	V-IDLER PULLEY	\$21,357.76	\$12,181.76	(\$22,816.00)
9	6290-48009	V-IDLER PULLEY	\$103,488.00	\$72,336.00	(\$77,616.00)
10	NPN	DO NOT USE	(\$521,680.20)	(\$521,680.20)	(\$534,148.24)
			(\$89,705.90)	(\$140,887.90)	(\$726,883.94)

PULSE Customer Service Pinpoints Shipping Shortages

This unique screen is an 'MRP system' just for shipping customer orders. For example, you may want to pinpoint items scheduled to ship over the next 14 days for which you do not have a sufficient quantity. This is based on the due dates of supporting production orders, purchase orders, or your forecast that will meet the customer's promised delivery date.

Customer Order Shortages							
Drag a column header here to group by that column							
Loc	Item #	Item Description	Earliest Replenish	O/H Qty (All Loc)	Qty Allocate...	MRP - Demand Orders Count ▾	Earliest Shortage Dt (All Loc)
A C	A C	A C	=	=	=	=	=
CIN	984...	WHEEL	6/26/21	3	53	21	6/23/21
CIN	984...	WHEEL	6/20/21	2	50	21	6/15/21
CIN	639...	TURNTABLE PULLEY B...	5/19/21	0	19	18	6/16/21
CIN	639...	TURNTABLE PULLEY B...	5/29/21	0	19	18	6/16/21
CIN	639...	TURNTABLE PULLEY B...	7/14/21	0	20	18	6/16/21
CIN	639...	TURNTABLE PULLEY B...	7/14/21	0	16	15	6/11/21

By drilling down on an item, you will see a time-phased list of customer orders and associated replenishment production/purchase orders or forecast. The result is an effective way to manage customer order shortages.

Customer Order Shortages										
Item # = 9847-54010 AND Loc = CIN										
Drag a column header here to group by that column										
Loc	Cust #	Customer Name	MRP - Ord Type	Item #	MRP - New Qty On-Hand (Loc)	MRP Ord #	MRP - Ord Dt	MRP - Demand/Replenish Date	MRP - Qty Demand/Replenish	Mfg Ord #
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	2 00215954		5/2/21	5/6/21	-1	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	1 00223507		6/4/21	6/6/21	-1	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	0 00224031		6/6/21	6/10/21	-1	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-4 00226897		6/19/21	6/23/21	-4	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-5 00227366		6/20/21	6/24/21	-2	
CIN	000000003100	DES MOINES DISTRIBUTORS	Production (Replenishment)	9847...	5 00215056		6/17/21	6/26/21	11	00215056
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	2 00227736		6/24/21	6/26/21	-3	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	1 00227764		6/24/21	6/26/21	-1	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-1 00227726		6/24/21	6/26/21	-2	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-3 00228161		6/25/21	6/27/21	-2	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-4 00228181		6/25/21	6/27/21	-3	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-13 00228458		6/26/21	6/30/21	-5	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-15 00228459		6/26/21	6/30/21	-4	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-17 00228455		6/26/21	6/30/21	-2	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-19 00229189		6/30/21	7/3/21	-2	
CIN	000000003100	DES MOINES DISTRIBUTORS	Production (Replenishment)	9847...	1 00216327		6/26/21	7/7/21	20	00216327
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-1 00229422		7/1/21	7/7/21	-2	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-5 00229456		7/3/21	7/9/21	-4	
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847...	-7 00230629		7/8/21	7/11/21	-2	

Creating Macola Customer Orders PULSE Dashboard

Adding a Purchase Order, POP Production Order, or a Customer Order from PULSE Dashboard to Macola is available. On any Item or Customer Number listed on any report, simply right-click to display the menu listing Macola Processes. This will allow selected users to enter a Customer Order for that item. Additional items may also be added to the customer order as needed. This process is available from any report that displays Item Numbers or Customer Numbers.

Create / Edit Sales Order

Order Number

Customer: 000000001700 User Name: mgeuy Order Date: 7/6/2017 Shipping Date:

Billing Address **Shipping Address** **Options**

CANADA DISTRIBUTORS CANADA DISTRIBUTORS Sales Person: 01 House Account

1250 TECHNY ROAD 621 LINCOLN COUNTY PARKWAY EXT Payment Terms: TT WIRE TRANSFER

ATTN: IMPORT DEPARTMENT LINCOLN NC 28092-0000 USA

NORTHBROOK IL 60062 USA

USA

Line Items

Drag a column header here to group by that column

Line #	Item #	Customer Item #	Location	Description 1	Description 2	Quantity	Unit Price	Unit Of Measure	Total
1	003-E3000-0054		CIN	WHEEL ...		1	\$39.15	EA	\$39.15

Record 1 of 1

Salestax **Shipping** **Order Totals**

☐ Taxable Order Ship Via: IMP DIRECT IMPORT Sub Total: \$39.15

Tax Code: NA None Freight Charges: \$0.00 Shipping: \$0.00

0.0000 Instructions 1: Sales tax: \$0.00 Grand Total: \$39.15

Instructions 2:

Delete Order View Header Comments Settings Save

When the User selects the option to Create OE Order, a screen is displayed to enter the Customer, Item Number, quantity, and price to Order. When finished, select Save, and the Order is added to your Macola® software, where it is processed like any other order.

For more information on any of our PULSE family of Macola® add-on software products, call (513) 723-8091

Leahy Consulting is an independent ERP consulting company with over 30 years of experience supporting and optimizing the Macola® ERP software. Leahy Consulting is not associated with ECi® Software.

Visit www.PULSEDashboard.com

Copyright © 2023 by Leahy Consulting, Inc. Cincinnati, Ohio 45208 USA

LEAHY
ERP SOLUTIONS

Independent ERP and Macola® Specialists
Expert Support/Optimization for 25 years
Developer of Pulse Dashboard software