PULSE DASHBOARD™
REALTIME DATA MANAGEMENT SUITE

Sales & Marketing Module – sample screens
Take charge of your business with PULSE Dashboard Software

PULSE is revolutionary software that lets you leverage your Macola® investment a new way—with a real-time display of your 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, Customer Service/Shipping, Inventory and Purchasing and Financial Control.

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®
- One-click drill-down to view details & One-click report writer generates custom reports
- Export all graphs, 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).
- The ability to assign a forecast/budget to any of the sales metrics you are tracking.
- Easily and quickly create 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.
- All screens can be maximized for easier viewing.
- Anything you see on the screen can be exported to Excel or PDF, printed or e-mailed.

The following sample screen displays Sales by Customer. In this example, we have established both a sales and a margin budget for each customer. By adding the column called "YTD Sales vs. Budget Variance %" we can very quickly see how each customer is performing versus their budget. For example, customer #1000, your top customer, is 3% under budget.

Sales by customer

Drag a column header here to group by that column

Cus #	Cus Name	MTD Sales $	MTD Margin %	YTD Sales $ ▽	YTD Sales Bud. $	YTD Sales vs Bud. Var %	YTD Margin $	YTD Margin Bud. $
000000001000	CINCINNATI DISTRIBUTORS	$523,009	85 %	$3,725,246	$3,821,326	-3 %	$3,329,016	$2,575,242
000000001300	FLORIDA DISTRIBUTORS	$92,659	87 %	$2,990,769	$24,540	12,087 %	$2,892,695	$16,538
000000001100	NEW YORK DISTRIBUTORS	$177,982	30 %	$2,456,342	$3,018,088	-19 %	$1,798,648	$2,033,929
000000001200	CAROLINA DISTRIBUTORS	$33,897	51 %	$769,087	$1,507,539	-49 %	$663,628	$1,015,950
000000001500	ASIA DISTRIBUTORS	$53,566	70 %	$661,951	$589,535	12 %	$597,636	$397,295
000000001900	MAINE DISTRIBUTORS	$49,741	0 %	$283,052	$390,772	-28 %	$216,079	$263,347
000000001600	CALIFORNIA DISTRIBUTORS	$0		$238,515	$691,939	-66 %	$231,214	$466,307
000000001400	MEXICO DISTRIBUTORS	$6,098	21 %	$235,653	$362,473	-35 %	$170,082	$244,275
000000002300	CHICAGO DISTRIBUTORS	$1,417	53 %	$193,015	$199,481	-3 %	$135,174	$134,433
000000002100	ARKANSAS DISTRIBUTORS	$4,047	8 %	$180,532	$241,424	-25 %	$90,563	$162,699
000000002600	OHIO DISTRIBUTORS	$45,743	0 %	$178,727	$90,168	98 %	$93,515	$60,765

The PULSE Sales & Marketing module lets you track sales

Application example: Your company sells products in several categories and your president want to know which product categories contribute the highest gross margin. She/he wants to use PULSE for this analysis because she/he is considering dropping the products that are poor contributors. In the sample screen below, we have sorted the list based on YTD sales dollars.

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	

The PULSE Sales & Marketing module lets you track performance versus budget with drill-down

Application example: Your sales manager is pleased with overall sales results but she notices that margin percentages are dropping. As a result, she established bonus for each salesperson who can meet her margin goals. She wants to use PULSE to give her the ability to very quickly determine which salespeople are not meeting their margin goal. In the sample screen below, the far right column allows her to see instantly who is meeting their margin goals.

Sales by Territory

Drag a column header here to group by that column

Slspsn Terr	Slspsn #	MTD Sales $	MTD Margin $	MTD Margin %	YTD Sales $ ▽	YTD Margin $	YTD Margin %	YTD Margin Bud. $	YTD Margin vs Bud. Var %
Midwest	01	$899,638	$626,690	70 %	$11,095,013	$9,527,659	86 %	$7,324,100	30 %
South	50	$33,897	$17,407	51 %	$767,830	$662,689	86 %	$1,015,950	-35 %
East	45	$95,484	$323	0 %	$461,779	$309,594	67 %	$324,112	-4 %
Midwest	19	$0	$0		$191,598	$134,426	70 %		
East	43	$0	$0		$2,016	$2,016	100 %	$0	
West	53	$0	$0		$0	$0			
		$1,029,019	$644,420		$12,518,235	$10,636,384		$8,664,162	

A new feature of the Sales & marketing modules allows you to right-click on a field and choose from a variety of instant reports. In our example, we want to view all open orders within the Midwest territory.

st	01	$899,638	$626,690	70 %	$11,095,013

Slspsn Terr: Midwest $33,897 $17,407 51 % $767,830

| Executive ▶ | Accounts Receivable ▶ | 0 % | $461,779 |

st 19

43

53

Customer Open Orders ▶

Booked Orders ▶

Invoiced Orders ▶

View Overall

View Available

View B/Os

View Shortages

View On Hold

View Shipped Not Posted

View Quotes

Open Customer Orders Total (Slspsn Terr: Midwest) PULSE DASHBOARD FOR MACOLA

Open Customer Orders Total (Slspsn Terr: Midwest)

Drag a column header here to group by that column

Cust # △	Cust Name	Margin $	Ord Count	Margin %	Total $
000000001000	CINCINNATI DISTRIBUTORS	$666,373.95	1,067	58.26 %	$1,143,758.07
000000001100	NEW YORK DISTRIBUTORS	$81,592.19	42	28.40 %	$287,308.90
000000001300	FLORIDA DISTRIBUTORS	$200,741.46	16	56.14 %	$357,543.00
000000001400	MEXICO DISTRIBUTORS	$4,229.27	163	26.05 %	$16,232.54
000000001500	ASIA DISTRIBUTORS	$23,728.30	10	68.74 %	$34,517.89
000000001600	CALIFORNIA DISTRIBUTORS	$3,696.01	3	52.93 %	$6,982.76
000000001800	NEW JERSEY DISTRIBUTORS	$840.07	4	25.52 %	$3,291.90
000000002100	ARKANSAS DISTRIBUTORS	$371.69	2	15.51 %	$2,397.00
000000002200	OMAHA DISTRIBUTORS	$489.79	79	10.42 %	$4,700.16
000000002400	LOS ANGELES DISTRIBUTORS	$22.07	1	36.23 %	$60.92
000000002800	AKRON DISTRIBUTORS	$1,427.55	4	18.08 %	$7,896.80
		$989,723.02	1,436		$1,877,264.12

The PULSE Sales & Marketing module lets you create an unlimited number of sales charts

Application example: You are the new sales vice president and you need to track sales by Product Category, Item number, Salesperson, Customer, and Territory. Pulse will allow you to display an unlimited number of sales charts on our screen. If they will not all fit on one screen, PULSE provides a convenient slide bar to scroll down.

Sales by Territory

Drag a column header here to group by that column

Slspsn Terr	Slspsn # △	MTD Margin $	MTD Margin %	ME Sales Bud. $	ME Margin Bud. $	YTD Sales $	YTD Margin $	YTD Margin %	MTD Sales $
Midwest	01	$626,690	70 %	$1,294,305	$872,249	$11,095,013	$9,527,659	86 %	$899,638
Midwest	19	$0				$191,598	$134,426	70 %	$0
	43	$0		$0	$0	$2,016	$2,016	100 %	$0
East	45	$323	0 %	$141,942	$95,656	$461,779	$309,594	67 %	$95,484
	50	$17,407	51 %	$212,336	$143,096	$767,830	$662,689	86 %	$33,897
	53	$0				$0	$0		$0
		$644,420		$1,648,583	$1,111,002	$12,518,235	$10,636,384		$1,029,019

Sales by SKU

Drag a column header here to group by that column

Item Desc 1 △	YTD Sales $	YTD Margin $	YTD Margin %	YTD Margin Bud. $	YTD Sales Bud. $
ADAPTER	$51	$51	100 %	$26,840	$39,827
ADAPTER HOUSING	$0	$0		$15,544	$23,065
ADAPTER KIT	$90,036	$66,698	74 %	$68,657	$101,878
ASSEMBLY KIT	$74,455	$62,038	83 %	$18,257	$27,091
	$12,518,235	$10,636,384		$8,664,071	$12,856,361

Sales by Product Category

Drag a column header here to group by that column

Prod Cat	YTD Sales $ △	YTD Margin $	YTD Margin %	YE Sales Bud. $	YE Margin Bud. $

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

We have included an easy to use, but very powerful budgeting screen. You can prepare your budget in Excel and import it into PULSE, you can manually key it or you can let PULSE create a draft budget which you can then refine. During the year or in subsequent years, you can adjust your budget based on a dollar amount or percentage. For example, we want to create a budget based on last year's sales plus 5% and we want to distribute the new budget among all customers based on their sales from last year. Additionally, we want to distribute our new budget equally each month or distribute it to match our seasonality.

We now offer budgeting by item, sales person, by customer, by customer and item, and by customer and ship-to location.

PULSE Sales & Marketing set-up is quick and easy

It is easy to set up each sales chart. In our example below, we have set up five sales charts. You can set up an unlimited number of charts. For each chart, you select the specific columns to be included.

For more information or a demonstration, call (513) 723-8091

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