

Pulse Dashboard & Reporting Software Training

Pinpointing Finished Goods & Component Shortages That are Preventing On-time Customer Shipping

(Updated 12/18)

New to the PULSE Dashboard & Reporting software?

- You may initially feel overwhelmed with (your) data
- You will quickly see miscoded data that will need to be corrected.
- Set realistic goals for cleaning up your data or implementing a better workflow.

How to increase your proficiency with the PULSE Dashboard software

- Organize teams of co-workers to discuss/share critical screens.
- Pinpoint 10 screens you want to start using to streamline your job function.
- Contact us at any time with questions or enhancement suggestions.

Any questions? Call our support desk at (513) 723-8095 or Support@PulseDashboard.com.

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The Big Picture (tips for a successful supply chain)

The Macola ERP software and our PULSE Dashboard software are very powerful tools to help better manage your operation. To take full advantage of the software, you also need to establish a goal of 100% accuracy. Why is this important? Without having this goal, you will constantly be ordering or manufacturing too much or too little; too early or too late; maintaining incorrect on-hand levels; and/or stocking out of needed inventory.

ERP software calculates demand and replenishment quantities based your open customer, purchase and production orders. Having accurate due dates on each order is the basis for giving you real-time information from which to make faster and better decision.

This is what we recommend:

- Dates – You Macola ordering screens display many date fields and it may be confusing. Your organization needs to agree on what Macola data field will be used for when determining when a customer orders really needs to be shipped and when a purchase order is really due to be delivered.
- Old customer, purchase & production orders – Old orders are easily overlooked, but demand, replenishment and allocated quantities are calculated based on reading all open orders. You need to continuously be closing or purging old orders.
- Accurate on-order and allocated quantities – these need to be 100% accurate or your Macola and PULSE Dashboard will not properly function.

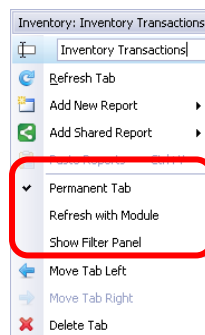
Review of PULSE Dashboard software important features:

1. Obtaining Technical Support

- You have unlimited phone/e-mail support and training with PULSE Dashboard.
- For phone support, call (513) 723-8095.
- For e-mail support, Go to > Help menu > About > Support@PulseDashboard.com.

2. Refreshing Data

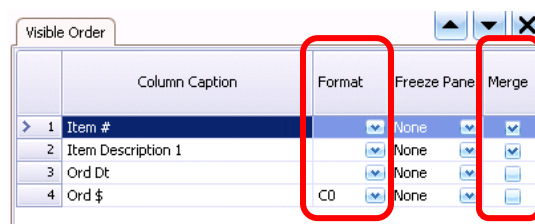
- Refreshing a Report – double-click on the blue bar at the top of the Report.
- Refreshing a Tab – double-click on the Tab name.
- Refreshing Current or All modules - click on the Refresh button at the top of the screen.
- Refreshing every X minutes - click on one of the 'Auto-refresh' buttons at the top of the screen and select the desired number of minutes. It starts once you click 'OK'.
- Recommendation – Turn OFF the auto refreshing option for all tabs that are not used every day or if your refresh times are long. Right-click on the tab name and un-check the 'Refresh with Module' check-box.



3. Column Chooser Formatting Options (All Modules)

- When viewing a listing of data (dates, items, customers, etc.) the Merge or Format option reduces "clutter" on the screen and is easier to see where a value starts and ends or controls the number of decimal places.
- To use this option, change the Format selection or check the Merge checkbox in the Column Chooser.

Example:



Before Formatting:

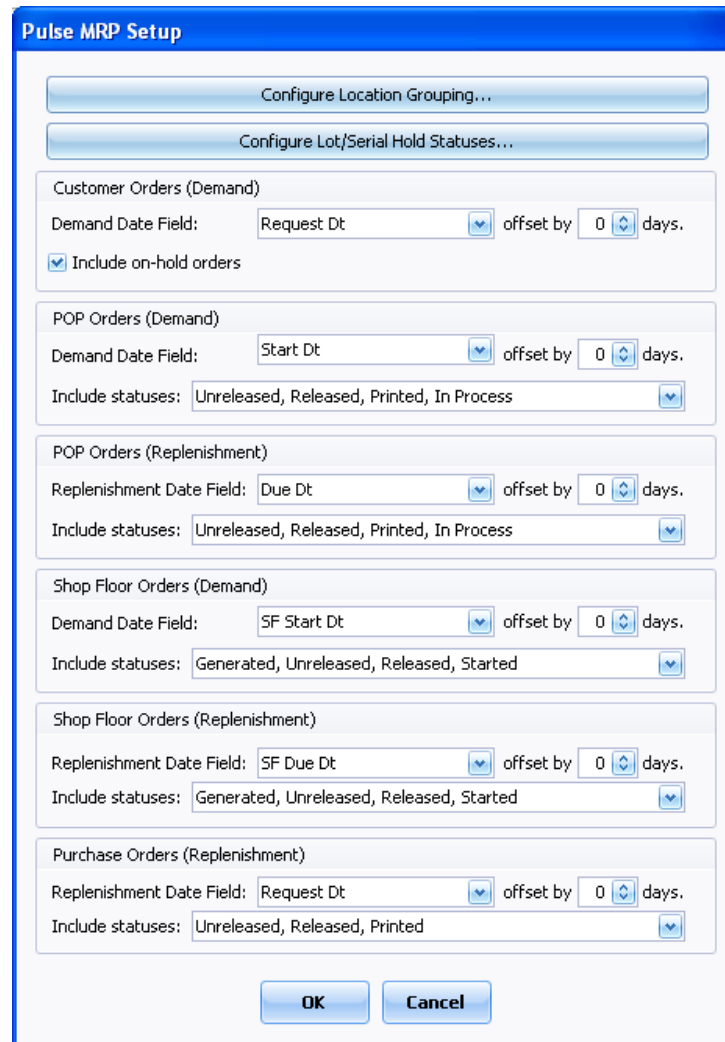
Item #	Item Description 1	Ord Dt	Ord \$
261-E5413	BELT	1/10/13	\$851.84
261-E5413	BELT	3/5/13	\$53.24
261-E5413	BELT	8/8/12	\$54.94
261-E5413	BELT	1/11/13	\$1,756.92
261-E5413	BELT	1/31/13	\$106.48
261-E5446	BELT	4/16/13	\$106.48
261-E5446	BELT	4/24/14	\$108.08
261-E5452	BELT	3/24/14	\$54.04
262-E3409	BELT	10/19/12	\$109.66
262-E3409	BELT	5/4/13	\$562.00
263-E5431	BELT	5/27/14	\$61.54
264-E3409	BELT	8/30/12	\$275.96
264-E3409	BELT	7/7/12	\$137.98
264-E3409	BELT	7/27/12	\$137.98
264-E3695-0054	BELT	1/2/13	\$270.84
265-E3409	BELT	7/27/12	\$160.07
265-E3409	BELT	7/7/12	\$160.07
265-E3695-0054	BELT	1/2/13	\$313.06

After Formatting:

Item #	Item Description 1	Ord Dt	Ord \$
261-E5413	BELT	1/10/13	\$852
		3/5/13	\$53
		8/8/12	\$55
		1/11/13	\$1,757
		1/31/13	\$106
261-E5446	BELT	4/16/13	\$106
		4/24/14	\$108
261-E5452	BELT	3/24/14	\$54
262-E3409	BELT	10/19/12	\$110
		5/4/13	\$562
263-E5431	BELT	5/27/14	\$62
264-E3409	BELT	8/30/12	\$276
		7/7/12	\$138
		7/27/12	\$138
264-E3695-0054	BELT	1/2/13	\$271
265-E3409	BELT	7/27/12	\$160
		7/7/12	\$160
265-E3695-0054	BELT	1/2/13	\$313

4. Setup screens that affect all modules:

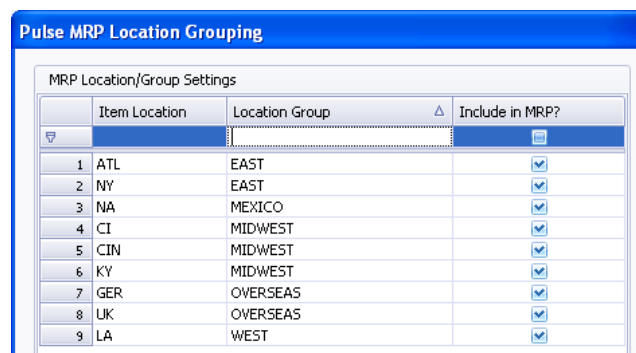
- a. From the main menu, go to > Administration > Tools > MRP (must be a PULSE Administrator). This screen controls critical dates used in PULSE.



The Pulse MRP Setup dialog box contains several sections for configuring MRP parameters:

- Configure Location Grouping...** (button)
- Configure Lot/Serial Hold Statuses...** (button)
- Customer Orders (Demand)**
 - Demand Date Field: Request Dt (dropdown) offset by 0 (spin) days.
 - ☒ Include on-hold orders
- POP Orders (Demand)**
 - Demand Date Field: Start Dt (dropdown) offset by 0 (spin) days.
 - Include statuses: Unreleased, Released, Printed, In Process (dropdown)
- POP Orders (Replenishment)**
 - Replenishment Date Field: Due Dt (dropdown) offset by 0 (spin) days.
 - Include statuses: Unreleased, Released, Printed, In Process (dropdown)
- Shop Floor Orders (Demand)**
 - Demand Date Field: SF Start Dt (dropdown) offset by 0 (spin) days.
 - Include statuses: Generated, Unreleased, Released, Started (dropdown)
- Shop Floor Orders (Replenishment)**
 - Replenishment Date Field: SF Due Dt (dropdown) offset by 0 (spin) days.
 - Include statuses: Generated, Unreleased, Released, Started (dropdown)
- Purchase Orders (Replenishment)**
 - Replenishment Date Field: Request Dt (dropdown) offset by 0 (spin) days.
 - Include statuses: Unreleased, Released, Printed (dropdown)
- OK** and **Cancel** buttons at the bottom.

- b. Location Grouping – this screen allows organizing of Macola Locations. For example, the main Location is Cincinnati, another is in Kentucky, plus a nearby outside storage warehouse. When reviewing quantities, Grouping the Locations will show the combined On-Hand and Allocated quantities across all of these three locations. The screen below is used to group them. The Column Chooser screen will also allow you to select the On-Hand Quantity for the Location, Group or All Locations.



The Pulse MRP Location Grouping dialog box displays a table for MRP Location/Group Settings:

	Item Location	Location Group	Include in MRP?
1	ATL	EAST	☒
2	NY	EAST	☒
3	NA	MEXICO	☒
4	CI	MIDWEST	☒
5	CIN	MIDWEST	☒
6	KY	MIDWEST	☒
7	GER	OVERSEAS	☒
8	UK	OVERSEAS	☒
9	LA	WEST	☒

5. Customizing existing screens

- Using 'Save & Share' to create multiple drill-down screens
- Publishing (sending) your screens to others

6. Creating custom tabs

- You can copy any screen from one module or tab to another
- You can optionally create multiple filters to the same tab.

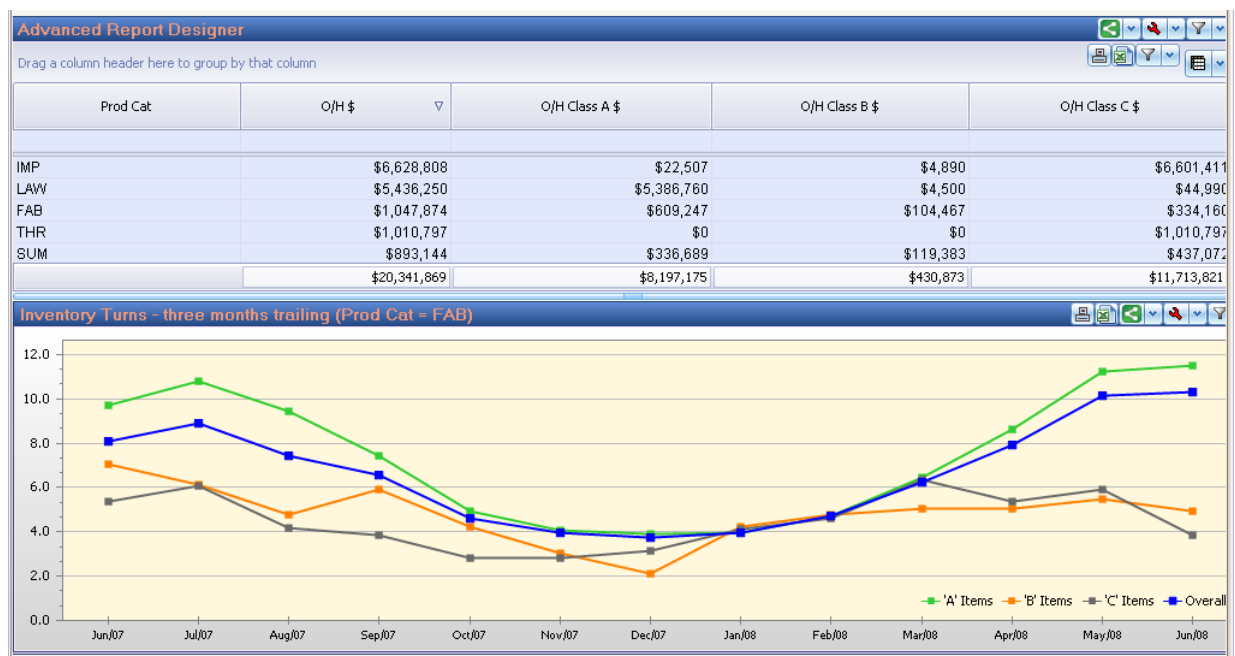
7. Quick links

- Right-click on a customer number, item number, vendor number, purchase order number, production order number, etc.
- Right-click on a production order number to change the due date, change the captured bill or material, report scrap and/or report production.

8. Advanced Report Designer (this requires licensing the PULSE Designer module)

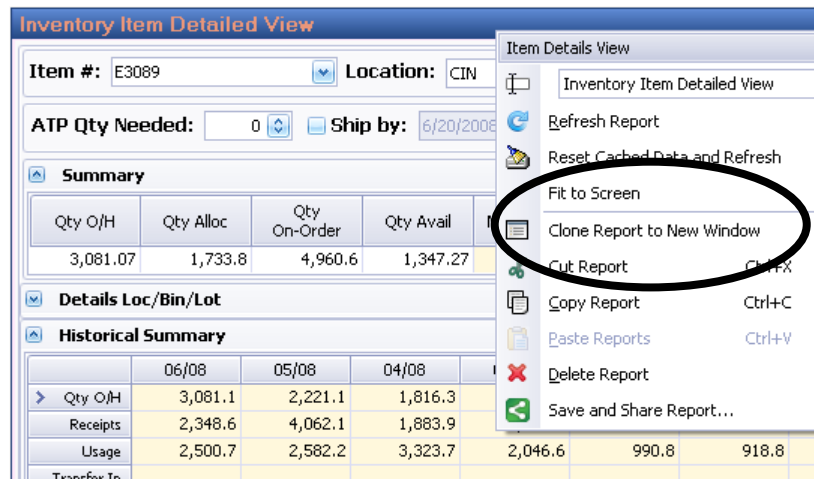
- Without this new feature, when you drill-down on a field, a new screen appears. The Advanced Report Designer allows you to link any two screens together. When you drill-down, the main screen and the drill-down screen both remain visible.

In this example, the inventory turns graph is linked to the stock status screen:



9. **Copy Screens to a New Window**

- This new feature allows you to take any screen and create a new screen that runs totally outside of and independent of Pulse. Simple right-click on the top blue border on any screen and specify 'Clone to New Window'.



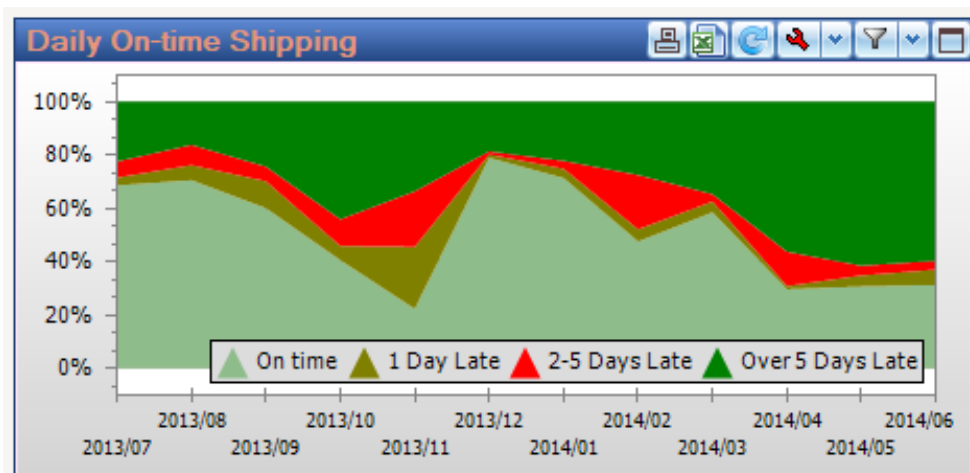
Pinpointing finished goods and manufacturing component shortages that are preventing on-time customer shipping

Mike Leahy tips?

- On a weekly basis, review past-due customer orders, purchase orders and manufacturing orders
 - Assign a revised due date to each one
 - If it is a purchase order where you did not receive the entire quantity, either change the quantity ordered or close the order
- Remember that closing a purchase order to a 'C' status does not close it – it needs to be changed to an 'H' status
- Our PULSE Shortages screens will help your if you are using the Macola MRP software and/or the PULSE MRP software.

Are you shipping on-time to your customers?

- On-time shipping can be tracked for the entire company, by customer, by product category, by salesperson, by territory, etc.



Start by looking at the Open Customer Orders screen in the Executive module to see if your 'Avail to Ship' number is less than the '\$Overall' that you have committed to your customer

	\$ Overall	\$ Avail to Ship	\$ Backorders	\$ Shortages	\$ On Hold	\$ Not Posted	Orders	%
Thru Today	\$97,233	\$37,597	\$28,566	\$13,581	\$0	\$17,490	37	5%
Tomorrow thru M/E	\$21,082	\$2,090	\$5,274	\$13,717	\$0	\$0	53	1%
Subtotal M/E	\$118,315	\$39,687	\$33,840	\$27,298	\$0	\$17,490	90	6%
Next 30 Days	\$431,421	\$98,369	\$24,371	\$211,433	\$0	\$97,248	660	20%
Next 60 Days	\$825,557	\$314,982	\$0	\$509,481	\$0	\$1,094	986	39%
Over 60 Days	\$729,245	\$209,443	\$0	\$519,802	\$0	\$0	28	35%
Subtotal Future	\$1,986,224	\$622,795	\$24,371	\$1,240,716	\$0	\$98,342	1,673	94%
Grand Total	\$2,104,539	\$662,482	\$58,211	\$1,268,014	\$0	\$115,832	1,762	
Avg / Order	\$1,194							
Quotes	\$0							

Pinpointing shortages for finished goods being shipped to customers

- Imagine that you are the customer service manager and your goal is to ship 100% on-time to all customers
- Make believe it is Monday. Set the number of days in the set-up screen to 5 days (Do I have any shortages this week?)
- Drill-down to each item and see what can be done.
- Later in the week, run the report looking 10 or 15 days into the future.

Items Causing Shortages

Box Caption: Customer Order Shortages by item

General Settings

Items causing shortage in the next days.

☒ Include Items ☐ Include Kits

Include MRP Regeneration Mode

☒ Per Item (All Locations)
☐ Per Item/Location
☐ Per Item/Location Grouping

Item/Location Minimum Quantity

☒ Default MRP Settings ☐ Safety Stock
☐ Zero ☐ Reorder Level

OK Cancel Save and Share...

Customer Order Shortages by item									
Drag a column header here to group by that column									
Loc	Item Pur or MFG	Item #	Item Description	O/H Qty (All Loc)	Qty Allocated (All Loc)	MRP - Demand Orders Count	Earliest Replenish	Earliest Shortage Dt (All Loc)	
CIN	M	9847-54010	WHEEL	3	53	21	06/26/15	06/23/14	
CIN	M	9846-54010	WHEEL	2	50	21	06/20/15	06/15/14	
CIN	M	6391-3091	TURNABLE PULLEY BELT	0	19	18	05/19/15	06/12/14	
CIN	M	6391-3089	TURNABLE PULLEY BELT	0	19	18	05/29/15	06/10/14	
CIN	M	6390-5425	TURNABLE PULLEY BELT	0	20	18	07/14/15	06/16/14	
CIN	M	6391-3090	TURNABLE PULLEY BELT	0	16	15	07/14/15	06/11/14	
CIN	M	6391-5430	TURNABLE PULLEY BELT	0	15	13	06/20/15	06/16/14	

Drill-down screen:

Loc	Cust Number #	Cust Name	MRP - Ord Type	Item #	MRP - New Qty On-Hand (Loc)	MRP Ord #	MRP - Ord Dt	MRP - Demand/Replenish Date	MRP - Qty Demand/Replenish
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	2	00215954	05/02/14	06/06/14	-1
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	1	00223507	06/04/14	06/06/14	-1
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	0	00224031	06/06/14	06/10/14	-1
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-4	00226697	06/19/14	06/23/14	-4
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-6	00227086	06/20/14	06/24/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-8	00227726	06/24/14	06/26/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-9	00227764	06/24/14	06/26/14	-1
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-12	00227736	06/24/14	06/26/14	-3
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-14	00228161	06/25/14	06/27/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-17	00228181	06/25/14	06/27/14	-3
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-19	00228455	06/26/14	06/30/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-24	00228458	06/26/14	06/30/14	-5
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-28	00228459	06/26/14	06/30/14	-4
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-30	00229189	06/30/14	07/03/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-32	00229422	07/01/14	07/07/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-36	00229856	07/03/14	07/09/14	-4
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-38	00230629	07/08/14	07/11/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-40	00230633	07/08/14	07/11/14	-2
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-44	00230628	07/08/14	07/11/14	-4
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-49	00231539	07/14/14	07/16/14	-5
CIN	000000003100	DES MOINES DISTRIBUTORS	Customer (Demand)	9847-54010	-50	00231530	07/14/14	07/16/14	-1
CIN			Production (Replenishment)	9847-54010	-39	00215056	06/17/14	06/26/15	11
CIN			Production (Replenishment)	9847-54010	-19	00216327	06/26/14	07/07/15	20

Pinpointing shortages for manufacturing orders

- Imagine that you are the production manager and your goal is to complete each order on-time.
- Make believe it is Monday. Set the number of days in the set-up screen to 5 days (Do I have any shortages this week?)
- Drill-down to each item and see what can be done.
- Later in the week, run the report looking 10 or 15 days into the future.

Components Causing Shortages

Box Caption: Component Shortages for Production Orders

General Settings

Components causing shortage in the next days.

Include Shortage Types

☒ Per Item
☐ Per Item/Loc
☐ Per Item/Loc Grouping

Item/Location Minimum Quantity

☒ Default MRP Settings ☐ Safety Stock
☐ Zero ☐ Reorder Level

OK Cancel Save and Share...

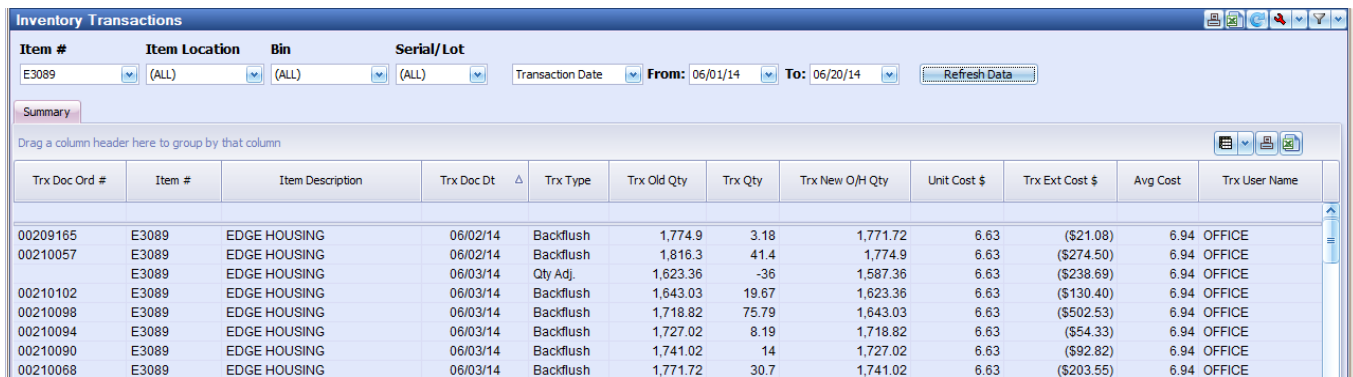
Item Description	Item #	Prod Cat	Item Pur or MFG	Vend #	Earliest Demand	O/H Qty (All Loc)	MRP - Replenish Orders Count	Net Qty (Loc)
BUSHING	POLY SH #308-CA	FAB	P	000000005800		0	3	-13
FRAMES	FRAME 6392	FRA	P	000000007000		0	2	341
FRAMES	FRAME 6391	FRA	P	0000000017900		0	2	303
FRAMES	FRAME 6390	FRA	P	0000000017900		0	2	131
BUSHING	POLY RH 6370	POL	P		04/11/14	6	0	-71
BUSHING	POLY RH 6315	POL	P		06/01/14	0	0	-2
BUSHING	POLY 20	POL	P		06/20/14	0	0	-196
VELCRO	VELCRO CUSTOMER	PAC	P		04/01/14	0	0	-1,558
VELCRO	VELCRO	PAC	P		06/18/14	0	0	-218
PACKAGING	SELF-TIES 2	PAC	M		04/11/14	0	0	-359
PACKAGING	SELF-TIES	PAC	M		06/20/14	0	0	-60
PACKAGING MATERIALS	SELF TIES/4	PAC	P		06/20/14	0	0	-66
SHIPPING CARTON INSERTS	INCHES 5X20 75X2	PAC	P		06/10/14	0	0	246
37								9

Drill-down screen.

MRP - Ord Type	MRP - Demand/Replenish...	MRP - Ord Dt	MRP Ord #	Vend #	MRP - Qty Demand/Replenish	MRP - New Qty On-Hand (All Loc)	Prod Cat
Purchase (Replenishment)	05/15/14	05/09/14	01632100	000000005800	1	1	FAB
Production (Demand)	05/22/14	04/28/14	00205524		-6	-5	FAB
Purchase (Replenishment)	07/22/14	07/16/14	01724000	000000005800	3	-2	FAB
Production (Demand)	07/24/14	07/15/14	00218862		-4	-6	FAB
Purchase (Replenishment)	07/25/14	07/21/14	01727300	000000005800	3	-3	FAB
Production (Demand)	08/08/14	07/14/14	00218639		-1	-4	FAB
Production (Demand)	08/09/14	07/14/14	00218669		-2	-6	FAB
Production (Demand)	08/10/14	07/15/14	00218697		-4	-10	FAB
Production (Demand)	08/14/14	07/21/14	00219390		-2	-12	FAB
Production (Demand)	08/16/14	07/21/14	00219412		-1	-13	FAB

Inventory Transaction screen

- This screen allows you to quickly determine the usage history of an item for a selected date range. Use the 'Transaction Date' option



Trx Doc #	Item #	Item Description	Trx Doc Dt	Trx Type	Trx Old Qty	Trx Qty	Trx New O/H Qty	Unit Cost \$	Trx Ext Cost \$	Avg Cost	Trx User Name
00209165	E3089	EDGE HOUSING	06/02/14	Backflush	1,774.9	3.18	1,771.72	6.63	(\$21.08)	6.94	OFFICE
00210057	E3089	EDGE HOUSING	06/02/14	Backflush	1,816.3	41.4	1,774.9	6.63	(\$274.50)	6.94	OFFICE
	E3089	EDGE HOUSING	06/03/14	Qty Adj.	1,623.36	-36	1,587.36	6.63	(\$238.69)	6.94	OFFICE
00210102	E3089	EDGE HOUSING	06/03/14	Backflush	1,643.03	19.67	1,623.36	6.63	(\$130.40)	6.94	OFFICE
00210098	E3089	EDGE HOUSING	06/03/14	Backflush	1,718.82	75.79	1,643.03	6.63	(\$502.53)	6.94	OFFICE
00210094	E3089	EDGE HOUSING	06/03/14	Backflush	1,727.02	8.19	1,718.82	6.63	(\$54.33)	6.94	OFFICE
00210090	E3089	EDGE HOUSING	06/03/14	Backflush	1,741.02	14	1,727.02	6.63	(\$92.82)	6.94	OFFICE
00210068	E3089	EDGE HOUSING	06/03/14	Backflush	1,771.72	30.7	1,741.02	6.63	(\$203.55)	6.94	OFFICE

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

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LEAHY
ERP SOLUTIONS

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