

## 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.

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 %
FRT	\$5	\$5	\$1,931	\$1,931	100 %	\$15	\$15	100 %
CSE	\$0	\$0	\$0	\$0	100 %	\$0	\$0	100 %
PWW	\$0	\$0	\$0	\$0		\$7,536	\$2,917	39 %
	\$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									
Slpsn Terr	Slpsn #	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.

Executive	Accounts Receivable	View Overall
Customer Open Orders	Booked Orders	View Available
Invoiced Orders		View B/Os
		View Shortages
		View On Hold
		View Shipped Not Posted
		View Quotes

↓

Cust #	Cust Name	Margin \$	Ord Count	Margin %	Total \$
00000001000	CINCINNATI DISTRIBUTORS	\$666,373.95	1,067	58.26 %	\$1,143,758.07
00000001100	NEW YORK DISTRIBUTORS	\$81,592.19	42	28.40 %	\$287,308.90
00000001300	FLORIDA DISTRIBUTORS	\$200,741.46	16	56.14 %	\$357,543.00
00000001400	MEXICO DISTRIBUTORS	\$4,229.27	163	26.05 %	\$16,232.54
00000001500	ASIA DISTRIBUTORS	\$23,728.30	10	68.74 %	\$34,517.89
00000001600	CALIFORNIA DISTRIBUTORS	\$3,696.01	3	52.93 %	\$6,982.76
00000001800	NEW JERSEY DISTRIBUTORS	\$840.07	4	25.52 %	\$3,291.90
00000002100	ARKANSAS DISTRIBUTORS	\$371.69	2	15.51 %	\$2,397.00
00000002200	OMAHA DISTRIBUTORS	\$489.79	79	10.42 %	\$4,700.16
00000002400	LOS ANGELES DISTRIBUTORS	\$22.07	1	36.23 %	\$60.92
00000002800	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**

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**

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	\$27,081
	\$12,518,235	\$10,636,384		\$8,664,071	\$12,856,361

**Sales by Product Category**

Prod Cat	YTD Sales \$	YTD Margin \$	YTD Margin %	YE Sales Bud. \$	YE Margin Bud. \$
----------	--------------	---------------	--------------	------------------	-------------------

Refresh completed - 6/2/2010 9:25:09 PM - Duration: 00:14 | Srv: (local) | DB: data | User: MLEAHY\Mike

## 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.

**Sales Analysis Budget Setup**

Fiscal Year: 2008 Budget Scenario: DEFAULT Manage Budget Scenarios

Lock Periods

Current Adjustments Budget Adjustments Historical Adjustments

Increase/Decrease Sales Budget \$: \$0 0% Target Sales Budget \$: \$18,875,790 Change Visible

Increase/Decrease Margin Budget \$: \$0 0% Target Margin Budget \$: \$12,720,641 Change Visible

Period Distribution %

Distribute Proportionally

Distribute Equally

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 Sales Person Entry Item Entry Create Custom Entry

Budget per CUSTOMER NUMBER

Drag a column header here to group by that column

	Customer Number	Customer Name	Customer Type	Default Sales Person	Sales Budget Period 01	Sales Budget Period 02	Sales Budget Period 03	Sales Budget Period 04	Sales Budget Period 05	Sales Budget Period 06	Sales Budget Period 07	
>	1	000000001000 CINCINNATI DISTRIBUTORS ...	SUM	CA	01	\$407,910	\$1,091,712	\$517,713	\$1,193,732	\$384,765	\$225,495	\$264,573
	2	000000001100 NEW YORK DISTRIBUTORS ...	SUM	01		\$259,004	\$357,937	\$634,832	\$307,358	\$556,199	\$902,758	\$457,590
	3	000000001200 CAROLINA DISTRIBUTORS ...	SUM1	50		\$248,591	\$157,134	\$286,434	\$323,026	\$280,017	\$212,336	\$101,212
	4	000000001300 FLORIDA DISTRIBUTORS ...	SUM	01		\$24,540	\$0	\$0	\$0	\$0	\$0	\$0
	5	000000001400 MEXICO DISTRIBUTORS ...	SUM	01		\$93,440	\$30,655	\$110,303	\$4,338	\$79,555	\$44,182	\$39,837
	6	000000001500 ASIA DISTRIBUTORS ...	SUM	01		\$90,771	\$118,307	\$71,938	\$87,862	\$150,777	\$69,880	\$45,390
	7	000000001600 CALIFORNIA DISTRIBUTORS ...	SUM	01		\$5,079	\$212,538	\$123,156	\$363,375	\$9,134	(\$21,343)	\$2,217
	8	000000001700 CANADA DISTRIBUTORS ...	SUM	01		\$87,746	\$195,645	\$64,758	(\$861)	\$0	\$0	\$0
	9	000000001800 NEW JERSEY DISTRIBUTORS ...	SUM	01		\$75,813	\$141,245	\$70,325	\$2,507	\$68,425	\$14,041	\$66,308
	10	000000001900 MAINE DISTRIBUTORS ...	SUM4	VA	45	\$0	\$99,000	\$151,374	\$1,309	\$68,703	\$70,385	\$32,387
	11	000000002000 KENTUCKY DISTRIBUTORS ...	SUM	01		\$0	\$225,641	\$55,122	\$151,331	\$3,439	(\$1,502)	\$25,047
	12	000000002100 ARKANSAS DISTRIBUTORS ...	SUM	VT	01	\$41,942	\$20,279	\$68,784	\$25,291	\$62,593	\$22,534	\$25,425
	13	000000002200 OMAHA DISTRIBUTORS ...	SUM	01		\$0	\$0	\$12,074	\$503	\$4,200	\$4,638	\$3,703
	14	000000002300 CHICAGO DISTRIBUTORS ...	SUM	...	01	\$62,988	\$33,790	\$8,618	\$34,948	\$59,137	\$0	\$3,280
	15	000000002400 LOS ANGELES DISTRIBUTORS ...	SUM	01		\$22,590	\$175,770	\$40,935	\$3,900	\$20,256	\$17,124	\$39,916
	16	000000002500 SEATTLE DISTRIBUTORS ...	SUM	ME	01	\$0	\$96,077	\$0	\$0	\$0	\$0	\$0
	17	000000002600 OHIO DISTRIBUTORS ...	SUM5	45		\$0	\$0	\$18,611	\$0	\$0	\$71,557	\$0
	18	000000002700 SAN DIEGO DISTRIBUTORS ...	SUM	CA	01	\$0	\$0	\$0	\$0	\$190,761	\$0	\$0
	19	000000002800 AKRON DISTRIBUTORS	SUM	01		\$61,428	\$55,721	\$595	\$0	\$498	\$0	\$0

## 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.

**Sales Summary Boxes Setup**

Show?	Box Caption	Budget Scenario	Custom Budget Entry
<input checked="" type="checkbox"/>	Sales by Product Category	DEFAULT	[DEFAULT]
<input checked="" type="checkbox"/>	Sales by SKU	DEFAULT	[DEFAULT]
<input checked="" type="checkbox"/>	Sales by sales person	DEFAULT	[DEFAULT]
<input checked="" type="checkbox"/>	Sales by customer	DEFAULT	[DEFAULT]
<input checked="" type="checkbox"/>	Sales by Territory	DEFAULT	[DEFAULT]

Sales Box 1 of 5

dit Layout for Sales by Product Category

OK Cancel

**For questions or a demonstration of the PULSE software,  
call Terry Lanham in Cincinnati at (513) 723-8091**

In one afternoon, we can have PULSE installed and running at your office with your data. On-going enhancements as well as unlimited set-up, training and phone support are all included as part of our annual maintenance. We encourage your phone calls with suggestions for making PULSE 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.

Visit [www.PulseDashboard.com](http://www.PulseDashboard.com)

©Copyright 2014 Esta Group/Leahy Consulting, Inc. 441 Vine Street – suite 4100 Cincinnati, Ohio 45202  
Founded in 1981, Leahy Consulting helps manufacturers and distributors significantly improve their accounting information systems and workflow.  
The Esta Group is a consortium of authorized Macola resellers in Ohio, Michigan, Iowa, California and Australia