

Executive module – sample screens

Take charge of your business with PULSE Dashboard & Analytics Software for GP

PULSE DASHBOARD is revolutionary software that lets you leverage your GP system in a new way - with real-time display of vital business metrics and detailed analysis with the click of a mouse. You will track critical factors for your business on your screen in real-time. Other modules include Customer Service/Shipping, Inventory Control, Purchasing, Financial Control, Production Control, and Material Requirements Planning.

PULSE Dashboard adds value to your Microsoft Dynamics GP investment

- Manage with real-time data, on-screen, company-wide, all the time
- Inconsistencies between reports from different departments are eliminated
- One-click drill-down to view details & One-click report writer generates custom reports
- All screen data exports to Excel/printer/PDF/e-mail
- No tedious set-up installation & training in an afternoon

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File Executive	Sales and Marketing	Inventory Settir	ngs Administration Hel	p									PULSE DASHBOARD
5/1/2017	C Refresh Current	Module Auto-refres	h 📃 🧐 Refresh All Mo	dules Auto-refresh	🔲 🗷 Ex	port to Excel Use	r Control					Login as U	er: MLEAHY
Executive F	Financial Custome	er Service Sales	and Marketing Inven	tory Purchasing	Producti	on Material R	equirements						
Summary Cust	tomer Analysis Product	Class Analysis Territ	ory Analysis Salesperson An	alysis A/R Aging A	A/P Aging G/	L Activity Analysis	New Tab New	w Tab (1) +	~)				
Current Bala	inces		Customer Orders St	immary						Top Invoiced Cu	istomers		<u>^</u>
	Acct Desc	Curren	MTD Actu Entered	al MTD Budget \$0 \$0	YTD Actual \$378,862	YTD Budget M	/E Prior Year YT \$0	D Prior Year To \$450,372	otal Prior Year \$457,894	Drag a column header	nere to group by that column		
Cash - Operatir	ng Account	\$163,130.49	Invoiced Open \$353,	\$0 \$0 12 \$0	\$460,785		\$0	\$372,852	\$377,854	Cust #	Cust Name	Inv \$ ∇	
		\$103,130.49								CENTRALC0001	Central Communications LTD	\$89,889	
Open Purcha	ase Orders		AR Aging			AP Aging				CONTOSOL0001	Contoso, Ltd.	\$72,470	
	Amount Order	s %	Current	\$263,642	12 %	Current		\$0	0 %	PLAZAONE0001	Plaza One Astor Suites	\$70,458 \$49,271	
Current	\$100.325	11 100 %	1-30 Days	(\$382)	0 %	1-30 Days		\$0	0 %	ASTORSUI0001 MAHLERST0001	Astor Suites Mahler State University	\$49,271 \$41,579	
Next 30 Days	\$28	1 0%	31-60 Days	\$0		30-60 Days		\$0	0 %	VANCOUVE0001	Vancouver Resort Hotels	\$32,289	-
Next 60 Days	\$0	0 0%		\$1,848,386	88 %	Over 60 Days		11,374	100 %	BREAKTHR0001	Breakthrough Telemarketing	\$22,819	
Over 60 D	\$0	0 0 %	Total	\$2,111,646		Tot	tal \$1,3	11,374		LAWRENCE0001	Lawrence Telemarketing	\$17,110	
Total	\$100,354	12				Recvd Not Inv		\$0		AARONFIT0001	Aaron Fitz Electrical	\$17,034	
Customer Or	pen Orders									AAA001	Acme Equipment	\$13,620	
		\$ Overall	\$ Avail to Ship	\$ Not Alloc	\$ On Ho	ld \$No	t Posted	Orders	%			\$426,539	
Thru Today		\$217,381	\$174,546	\$42,835		\$930	\$27,033	28					
Tomorrow thru		\$2,910	\$1,910	\$1,000		\$0	\$1,110	3		Top Invoiced Ite	ms Past 12 months		
Next 30 Days Next 60 Days	Subtotal M/E	\$220,291 \$0 \$0	\$176,455 \$0 \$0	\$43,835 \$0 \$0		\$930 \$0 \$0	\$28,143 \$0 \$0	31 0 0	0 %	Drag a column header	nere to group by that column		_
Over 60 Days	Subtotal Future	\$132,821 \$132,821	\$2,623 \$2,623	\$130,198 \$130,198 \$130,198		\$0 \$0 \$0	\$132,941 \$132,941	44	38 %	Item #	Item Desc	Inv \$ 🗸	
	Grand Total	\$353,112	\$179,078	\$174,033		\$930	\$161,084	75		FAXX-CAN-9800	Cantata FaxPhone 9800	\$109,758 🔦	
Avg / Order		\$4,708								HDWR-CAB-0001	Central Cabinet	\$96,950	
Quotes										HDWR-ACC-0100	Acclaimed Call Center System 100	\$70,010	
Advertised in the				1. M.						SOFT-PHM-0001	Phone Mail System	\$69,110	
Monthly Invo			Mont	hly Margin						FAXX-SLK-2100	Sleek UX-2100 fax	\$15,880	
\$500,000.0	0 -			-						1-A3483A	SIMM EDO 72	\$13,000	
\$400,000.0			200 %	1						HDWR-RNG-0001	Ring Generator	\$12,060	
										HDWR-PRO-4862	Pro processor 4S	\$12,000	
\$300,000.0	0		150 %							HDWR-LDS-0001 128 SDRAM	Network LDS/Card	\$10,820 \$8,518 ¥	
\$200,000.0			100 %							120 SURAM		\$418,104	
												\$910,109	
\$100,000.0	0		50 %										
\$0.0	0	- 2017 - 2016	- Projection 0 %			2	017 2016						
\$0.0		tay Jun Jul Aug S		Jan Feb Mar A	ipr May Jun	Jul Aug Sep (Oct Nov Dec						~

The Executive module offers:

- Track customer orders received and shipped for this year vs. last year vs. budget
- Sales margin tracking and analysis
- Orders to be shipped by the end of the month to maximize revenue
- Aging of A/R, A/P, and purchase orders
- Critical balance sheet accounts monitoring
- General ledger expense monitoring
- Custom Tabs allow you to view the performance of key customers, customer types, items, product classifications, shipping locations, salespersons, sales territories, etc.

PULSE Executive tracks sales & bookings by day/month vs. last year vs. budget



PULSE Executive focuses your attention on on-time shipping

To maximize your monthly sales, it is essential to know the status of each unshipped customer order. PULSE allows you to concentrate on unshipped orders. Staff can be assigned to research why some orders were not shipped on time.

	\$ Overall	\$ Avail to Ship	\$ Backorders	\$ Shortages	\$ On Hold	\$ Not Posted	Orders	%
Thru Today	\$97,193	\$37,597	\$28,566	\$13,540	\$0	\$17,490	36	59
Tomorrow thru M/E	\$21,082	\$2,090	\$5,274	\$13,717	\$0	\$0	53	19
Subtotal M/E	\$118,274	\$39,687	\$33,840	\$27,257	\$0	\$17,490	114	
Next 30 Days	\$431,421	\$98,369	\$24,371	\$211,433	\$0	\$97,248	660	21 %
Next 60 Days	\$825,517	\$314,982	\$0	\$509,440	\$0	\$1,094	985	39 %
Over 60 Days	\$729,245	\$209,443	\$0	\$519,802	\$0	\$0	28	35 %
Subtotal Future	\$1,986,183	\$622,795	\$24,371	\$1,240,675	\$0	\$98,342	1,652	
Grand Total	\$2,104,457	\$662,482	\$58,211	\$1,267,932	\$0	\$115,832	1,760	
Avg \$ / order	\$1,196			. ,			,	
Quotes	\$0							

PULSE Executive offers custom tabs

In addition to the company-wide summary screens, you can create custom tabs to display the performance of selected customers, customer types, product classifications, locations, salespersons, sales territories, etc.

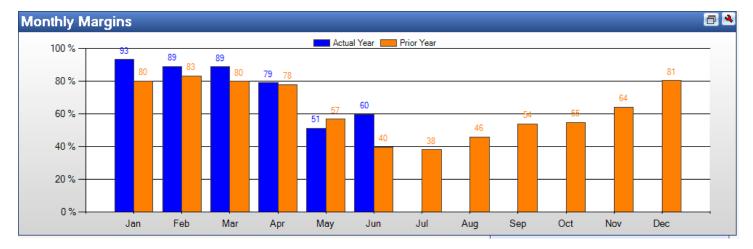


PULSE Executive offers expense analysis

You select the general ledger accounts you want to analyze. You can drill down into the details, choose the columns to be displayed, and print/export to Excel/e-mail the results.

Account Descr	iption 🛆							8
Expense control								
Account #	Account Description	(∆	lob # Date	\$ Amount	PKG	Customer/Vendor #	Customer/Vendor Name	
🗉 Employee s	upplies \$61,480							
∃ Roof repair	s \$8,322							
Truck repai	irs \$8,696							
30100-	Truck repairs		1/30/2008	\$548	AP			
30100-	Truck repairs		1/31/2008	\$840	AP			
30100-	Truck repairs		1/31/2008	\$1,244	AP			
30100-	Truck repairs		2/13/2008	\$222	AP			
30100-	Truck repairs		2/29/2008	\$420	AP			
30100-	Truck repairs		3/31/2008	\$373	AP			
30100-	Truck repairs		3/31/2008	\$194	AP			
30100-	Truck repairs		4/18/2008	\$289	AP			
30100-	Truck repairs		4/30/2008	(\$9)	AP			
30100-	Truck repairs		4/30/2008	\$441	AP			

PULSE Executive allows you to enlarge any graph for better viewing

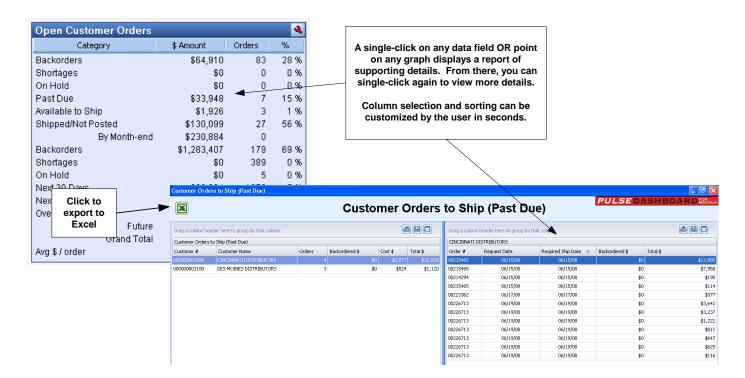


PULSE Executive provides real-time monitoring of orders received & shipped

Orders - J	une, 201	08		A 8 6
Booke	ed	Invoice		
\$ Amount	Orders	\$ Amount	Orders	Day
				1
\$38,176	53	\$84,425	35	2
\$22,561	25	\$11,235	12	3
\$79,804	35	\$19,498	24	4
\$8,617	13	\$135,216	34	5
\$120,573	22	\$57,804	36	6
				7
				8
\$34,680	46	\$97,172	27	9
\$35,136	28	\$211,405	37	10
\$23,405	31	\$58,585	25	11
\$80,100	14	\$64,355	35	12
\$38,538	23	\$58,355	27	13
				14
				15
\$34,063	48	\$85,358	29	16
\$10,154	16	\$102,113	16	17
\$6,423	10	\$24,017	34	18
\$55,217	23	\$48,792	21	19
\$45,768	32	\$158,940	19	20
\$633,213	419	\$1,217,269	411	Subtotals

PULSE Dashboard offers One-click drill-down and custom report writer

PULSE offers "One-click drill-down" on any screen or graph to view supporting details. The "Oneclick custom report writer" allows each user to quickly add or remove columns, change sorting and export the results to Excel/printer/PDF/e-mail in seconds. No database technical knowledge is needed.



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

We can have PULSE installed and running with your data in one afternoon. On-going enhancements and unlimited training and phone support are included in our annual maintenance.

Leahy Consulting is an independent ERP consulting company with over 30 years of experience supporting and optimizing ERP systems.

Visit <u>www.PulseGP.com</u>

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