

## Sales & Marketing 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 software 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 Executive, Sales & Marketing, Inventory Control, Purchasing, Financial Control, and Production Control.

#### **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
- Drill-down to view details & One-click report writer generates custom reports
- All data exports to Excel/printer/PDF/e-mail
- No tedious set-up installation & training in an afternoon

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. \$	YND 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

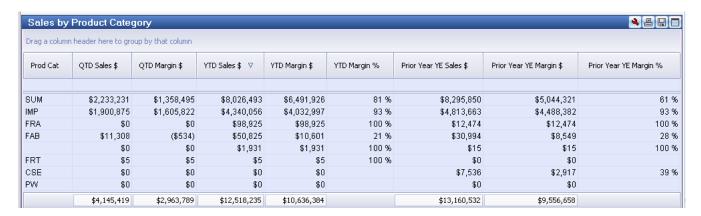
In the sample screen above, we have established both a sales and a margin budget for each customer. You can quickly see how each customer performs versus their budget. For example, customer #1000, your top customer, is 3% under budget.

#### **PULSE Sales & Marketing offers unique capabilities**

- Track sales by any metric (ex. customer, item number, product line, etc.)
- Create a forecast/budget for any of the metrics you are tracking
- Easily create new budgets or adjust existing budgets at any time.
- Track sales versus forecast for MTD, QTD, YTD, and prior year (dollars or percentage)
- Drill-down to view details
- The Column Chooser allows you to select the columns you want to display
- Sort and filter on any column.
- Screens can be maximized for easier viewing.
- Everything can be exported to Excel or PDF, printed, or e-mailed.

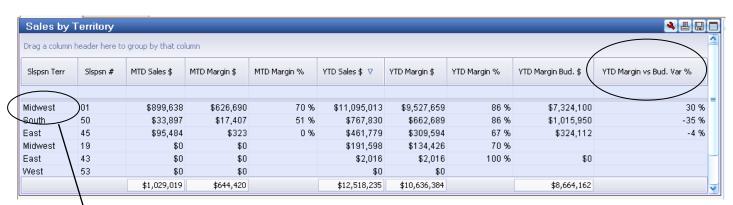
#### **PULSE Sales & Marketing module lets you track margins**

Example: Your company sells products in several categories. Your president wants to know which product categories contribute the highest gross margin. Use PULSE for this analysis to consider dropping products that are poor contributors.

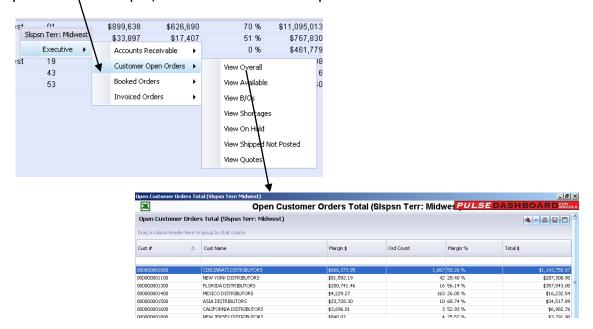


#### **PULSE Sales & Marketing module offers drill-down**

Example: Your sales manager is pleased with overall sales results but notices that margin percentages are dropping. She uses PULSE to quickly determine which sales personnel are not meeting their margin goal. As a result, she establishes a bonus for each salesperson who can meet her goals. The far-right column pinpoints which sales personnel are meeting their margin goals.

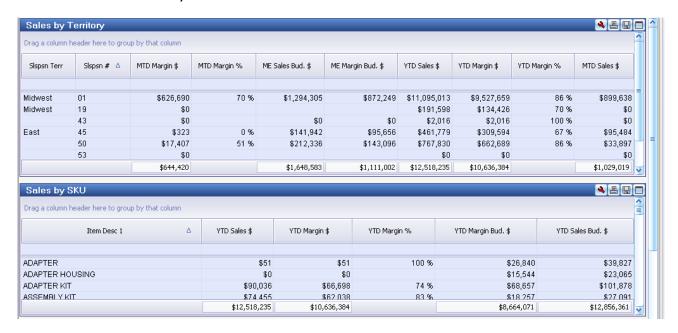


A unique feature of PULSE allows you to right-click on a field and choose from various instant reports. For example, we want to view all open orders within the Midwest territory.



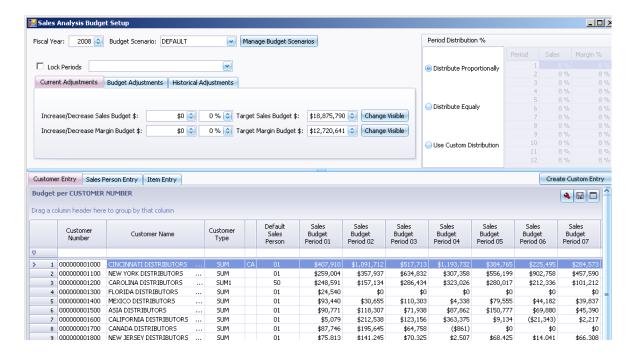
#### PULSE Sales & Marketing lets you create an unlimited number of sales charts

Example: You are the new sales vice president and need to track sales by Product Line, Item number, Salesperson, Customer, and Territory. PULSE allows you to display an unlimited number of sales charts on your screen.



#### PULSE Sales & Marketing lets you create sales budgets.

PULSE includes an easy-to-use but powerful budgeting screen. You can prepare your budget in Excel and import it into PULSE, or you can let PULSE create a preliminary budget which you can then refine. You can adjust your budget based on a dollar amount or percentage during the year. 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 the previous year. Additionally, we want to spread our new budget equally each month or distribute it to match our seasonality. We offer budgeting by item, salesperson, customer, and item.



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

We can have PULSE installed and running at your office with your data in one afternoon. Ongoing 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.

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