PULSE DASHBOARD™
REALTIME DATA MANAGEMENT SUITE

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. $	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

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.

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	

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.

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 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.

st	01	$899,638	$626,690	70 %	$11,095,013
Slspsn Terr: Midwest		$33,897	$17,407	51 %	$767,830
Executive ▶			0 %	$461,779
st	19				18
	43				6
	53				0

Accounts Receivable ▶
Customer Open Orders ▶ — View Overall
Booked Orders ▶ — View Available
Invoiced Orders ▶ — 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

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.

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

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.

Sales Analysis Budget Setup

Fiscal Year: 2008   Budget Scenario: DEFAULT   Manage Budget Scenarios

☐ Lock Periods

Period 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 %

● Distribute Proportionally
○ Distribute Equaly
○ Use Custom Distribution

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

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	$284,573
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

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. 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.

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