

PULSE Dashboard & Reporting Software Enhancements list for versions 5.16 to 5.19

(Updated 7/15/16)

PULSE DASHBOARD for Macola Progression/ES/10 is revolutionary software that lets you leverage your Macola system in a new way—with real-time display of vital business metrics, and detailed analysis with the click of your mouse. You will be able to track critical factors for your business, on-screen and real-time. The modules include:

- Executive
- Sales & Marketing
- Inventory Control
- Material Requirements Planning
- Purchasing
- Production Control
- Customer Service/Shipping Module
- Financial Control
- Designer Module

PULSE Dashboard version 5.19.6 is the newest and was released on 7/1/16. This is a major release, so you need to update your software. If you have questions about any of the software features mentioned in this document or need assistance implementing them, feel free to call our support desk at (513) 723-8095.

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- Details of the major enhancements
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- How to upgrade

SUMMARY OF WHAT'S NEW

- Maintain accounts receivable collection notes and follow-up dates
- Create Macola customer orders, purchase orders and POP production orders
- Modify released POP order due dates and report production
- Create custom formula data fields
- Faster processing for large companies and those with slow servers
- View A/R, A/P & P/O aging reports in either detail or summary mode
- Cash flow A/R forecast calculates using customer average days to pay; multi-currency support; include cash demand for payroll, loan payments, etc. in forecasts.
- View kit components
- Restore User settings to a previous day
- PULSE administrators can track usage by user
- 64-bit Windows compatibility
- PULSE Archive Database Records by Year report is now included
- Numerous new report data fields

LIST OF ENHANCEMENTS BY MODULE

Executive module

- A/R Collections notes can be maintained by customer and/or individual invoices.
- The Open Orders Aging report supports user defined time periods.
- The activity log allows managers to track user usage.
- Prevent selected users from making report changes.
- By right-clicking on a customer, or item, you can add a new Macola order.
- A/R, A/P and P/O Aging reports can be viewed in detail or summary
- We added multi-currency support for Macola ES/10 users.
- You can create and display custom formula data fields.
- You can now control the number of decimals and format date and currency fields.
- You can control which users can publish tabs to other users.
- User settings are saved every day if you need to restore them.
- 64-bit compatibility allows power users to retain more reports in memory.

Inventory

- The new Serial/Lot/Bin Status report can optionally display zero on-hand lots/bins.
- The Item Details View report:
 - o View BOM/Kits.
 - o Monthly buckets have been redefined as four-week periods.
 - o You can add buttons on the screen to call other reports.

Purchasing

- Receipts for purged P/O's can now be displayed.
- MRP reports will link purchase orders to the original O/E order, when possible.
- A new Vendor List report has been added.

Financial Control

- The Cash Flow Forecast now includes multi-currency support for ES/10 users.

Sales & Marketing

- The budget/forecast screen now can now import your forecast from Forecast Pro.

Customer Service/Shipping

- A new Customer List report has been added.

Production Control

- The Shop Floor View has an option to display order details for all orders.
- A new field has been added to the Reported Production report to shows the accumulated totals reported for each order.
- Shop Floor Details – the drill-down now runs faster

Designer module

- We updated the Crystal runtime for version 13.

DETAILS OF MAJOR ENHANCEMENTS

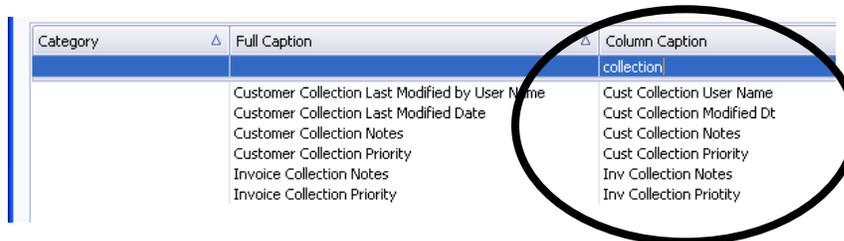
Accounts Receivable Collection Notes

For the first time, you can now maintain accounts receivable collection notes and follow-up dates for both Macola customers and unpaid invoices. Eliminate manual logs!

- Collection notes – Key in unlimited free-form notes. Modify or delete at any time.
- Follow-up dates – Sort by date to speed-up collections.
- Collection Priority code – You can establish priority codes to meet unique needs.

Using customer collection notes:

- When starting, use the column chooser to add three fields to your screen:
 - o Collection Notes
 - o Follow-up Date, and
 - o Collection Priority
- To add a collection note, right-click on the 'Cust Collection Notes' column.
- The notes screen will display, you can key in an unlimited number of notes and optionally timestamp each one. See the example below.



Customer collection notes:

AR Aging - detail												
Drag a column header here to group by that column												
Customer #	Customer Name	Terms Code	Avg Days to Pay YTD	Phone #	Collector Name	Contact Name	Cust Collection Notes	Follow-up Dt	Cust Collection	Total A/R	Current	1-30 Day
000000002...	AKRON DISTRIBUTORS ...	N30	69	2068...	JOHN ...	Called 6-1-16 - they say that we are using incor...	5/29/2016	High	\$6,208...	\$5,402...	\$806	
000000002...	ARKANSAS DISTRIBUTOR...	N30	32	8026...	LYNN ...	Called Mary - had to leave voice-mail	6/15/2016	High	\$1,640...	\$1,640...	\$0	
000000001...	ASIA DISTRIBUTORS ...	N45	54	...					\$64,735...	\$55,906...	(\$5,829)	
000000001...	CALIFORNIA DISTRIBUTO...	N30	112	5409...		Call after the holiday	7/8/2016		(\$1,509...	\$0.00	(\$26,000)	
000000001...	CAROLINA DISTRIBUTOR...	N07	33	4155...					(\$1,992...	\$1,838...	(\$154,000)	
000000002...	CHICAGO DISTRIBUTORS...	N30	44	4198...	DAVID ...				\$118.62	\$1,461...	\$0	
000000001	CINCINNATI DISTRIBUTO...	N30	54	8777	DAVID ...				\$1,497	\$1,265	\$132	

Unpaid invoice collection notes:

Doc #	Trx Doc Dt	Doc Type	Apply to #	Doc Due Dt	Reference	Inv Collection Notes	Follow-up Date	Total A/R	Current	1-30 Days
231498	5/8/13	I	231498	6/7/13	Po: 2234 Our Ord: ...		4/29/9994	\$305.86	\$0.00	\$305.86
231909	5/9/13	C	231909	6/8/13	Memo 225551 ApplyTo...			(\$50.72)	\$0.00	(\$50.72)
231910	5/9/13	I	231910	6/8/13	Po: 2236 Our Ord: ...	Never received - send another copy	6/24/2016	\$245.34	\$0.00	\$245.34
231910	5/8/13	I	231910	6/7/13	Po: 2235 Our Ord: ...			\$117.14	\$0.00	\$117.14
233666	5/19/13	I	233666	6/18/13	Po: 2236-RUSH Our Or...	Never recieved invoice		\$50.72	\$0.00	\$50.72
233709	5/19/13	I	233709	6/18/13	Po: 2240 Our Ord: ...	Waiting for approval		\$137.70	\$0.00	\$137.70
234806	5/21/13	I	234806	6/20/13	Po: 2241 Our Ord: ...			\$305.04	\$305.04	\$0.00
234807	5/21/13	I	234807	6/20/13	Po: 2243 Our Ord: ...	Waiting for approval		\$24.62	\$24.62	\$0.00
235630	5/27/13	I	235630	6/26/13	Po: 2247 Our Ord: ...			\$105.92	\$105.92	\$0.00
236506	5/29/13	I	236506	6/28/13	Po: 2248 Our Ord: ...	Waiting for approval		\$368.52	\$368.52	\$0.00
237077	6/2/13	I	237077	7/2/13	Po: 2245 Our Ord: ...	Waiting for approval		\$63.91	\$63.91	\$0.00
237311	6/3/13	I	237311	7/3/13	Po: 2250 Our Ord: ...			\$1,755.36	\$1,755.36	\$0.00
237733	6/4/13	I	237733	7/4/13	Po: 2244 Our Ord: ...	Never received invoice - send anothe copy.		\$174.24	\$174.24	\$0.00
238170	6/5/13	I	238170	7/5/13	Po: 2242 Our Ord: ...			\$111.96	\$111.96	\$0.00
238389	6/6/13	I	238389	7/6/13	Po: 2251 Our Ord: ...	Waiting for approval		\$258.84	\$258.84	\$0.00
239482	6/10/13	I	239482	7/10/13	Po: 2252 Our Ord: ...			\$749.38	\$749.38	\$0.00

Future enhancements include:

- Color-coding – You will be able to establish rules for color-coding individual cells.
- Place a customer on credit hold.
- Reprint a customer invoice or statement and e-mail it to the customer.

View A/R, A/P and P/O aging details or summary

Any of the Dashboard aging screens can now be viewed in summary or detail mode (or both). Click on the set-up icon to select the option you want. Below is an example A/R Aging report set-up screen as well as examples of summary and detail modes.

AR Aging
Box Caption: AR Aging - summary

Presentation Mode

Summary Details

Retrieve Settings from Macola

Age By: Due Date

	Days	Description
> Period 1	0	Current
Period 2	30	1-30 Days
Period 3	60	31-60 Days
Period 4	9,999	Over 60 Days

Aging Period 1 of 4

OK Cancel Save and Share...

Sample screen showing a summary and detail A/R aging reports:

AR Aging - summary		
Current	\$1,895,423	84 %
1-30 Days	\$237,302	11 %
31-60 Days	\$101,147	4 %
Over 60 Days	\$25,106	1 %
Total	\$2,258,977	

AR Aging - detail												
Drag a column header here to group by that column												
Customer #	Customer Name	Terms Code	Avg Days to Pay YTD	Phone #	Collector Name	Contact Name	Cust Collection Notes	Follow-up Dt	Cust Collection	Total A/R	Current	1-30 Day
000000002...	AKRON DISTRIBUTORS ...	N30	69	2068...		JOHN ...	Called 6-1-16 - they say that we are using incor...	5/29/2016	High	\$6,208....	\$5,402....	\$806
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000000001...	ASIA DISTRIBUTORS ...	N45	54	...						\$64,735...	\$55,906...	(\$5,829)
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000000001...	CAROLINA DISTRIBUTOR...	N07	33	4155...						(\$1,992....	\$1,838....	(\$153,400)
000000002...	CHICAGO DISTRIBUTORS...	N30	44	4198...		DAVID ...				\$118.62	\$1,461....	\$0
000000001...	CINCINNATI DISTRIBUTO...	N30	54	8777...		CLIST				\$1,497	\$1,265	\$135

Modify due dates and report production for released POP production orders

If you right-click on a POP order number in any PULSE report to change the due date or report production for one or multiple POP orders. Yes, you can now change due dates for released POP orders.

Production Schedule - by order number

Drag a column header here to group by that column

POP Ord #	Production Ord Status	Item #	Customer #	Item Description 1
00207105	P	6690-5498 ...	CINMAR...	BELT
POP Ord #: 00214254		9846-54010...		WHEEL
		9845-54010...		WHEEL
		9837-54010...		WHEEL
		9671-5453 ...	TBAKER...	MOTOR
		9971-5439...	TBAKER...	MOTOR

Context Menu:

- Shared Tabs
- Permanent Tabs
- Apply to Report
- Macola Processes
 - Edit POP Order**
 - Report Production by Order
 - Report Production for Multiple Orders
- Copy Value
- Enable Cell Selection

On this sample screen, you can change the due date or report production:

Order Number 00207105 **Status: Released**

Item to Produce: 6690-5498
BAIN DE SOEIL CHAISE
VELLUM

Location: CIN

Quantity: 100
Unit Price: 73.53
Unit Cost: 57.148752

Release Date: 5/5/2013
Quantity Reported:
Due Date: 5/18/2013
Start Date: 5/19/2013
Job Number:
Reference: CINMAR

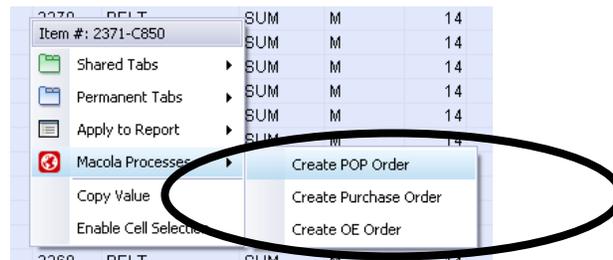
Bill of material to be used for this order

Parent Item #	Component Item #	Location	Qty Per Parent	Total Qty
6690-5498	E5498	CIN	3.2200	322
6690-5498	SELF-TIES2 CUST	CIN	1.0000	100
6690-5498	POLY FG 6690	CIN	1.0000	100
6690-5498	CARTON VERA CHS	CIN	1.0000	100
6690-5498	POLY BAG CUST	CIN	10.0000	1000
6690-5498	EW8R	CIN	1.0000	100
6690-5498	LABOR	CIN	0.761904	76.1904
6690-5498	OVERHEAD	CIN	0.761904	76.1904
6690-5498	WFLCRD	CIN	1.0000	100

Buttons: Report Production, Release, Save

Create Macola customer orders, purchase orders or POP production orders in PULSE

If you right-click on an item number, vendor number or customer number, you can create a new Macola purchase order, production order or customer order.



The Accounts Receivable Cash Flow Forecast calculates based on each customer's average days to pay and does not use the invoice due date. You can also include non-Macola cash flow items such as loan payments or payroll.

In the example below, I have set up the software to calculate the A/R cash flow forecast to be based on each customer's average days to pay for the past three months:

Caption	\$ Totals	\$ Next 30 Days	\$ Next 60 Days	\$ Next 90 Days	\$ 6/22/2013	\$ 6/29/2013	\$ 7/6/2013	\$ 7/13/2013	\$ 7/20/2013	\$ Future
Current Cash Balance	\$828,732									
Accounts Receivable	\$2,258,977	\$2,021,048	\$237,928		\$523,079	\$113,239	\$446,850	\$631,984	\$305,896	\$237,928
Unshipped Customer Orders	\$2,104,539	\$127,911	\$338,081	\$914,051	\$486		\$757	\$38,269	\$88,399	\$1,976,628
Accounts Payable	(\$523,898)	\$188	(\$513,127)	(\$10,959)	\$188					(\$524,086)
Unreceived Purchase Orders	(\$1,145,945)	(\$336,170)	(\$238,467)	(\$528,452)	(\$59,385)	(\$9,354)	(\$250,150)	(\$17,281)		(\$809,775)
Received/Not Invoiced P/O's	(\$430,810)	(\$88,360)	(\$163,435)	(\$178,896)	(\$9,315)	(\$482)	(\$1,224)	(\$692)	(\$76,648)	(\$342,450)
Other - Payroll	(\$2,400,000)	(\$150,000)	(\$150,000)	(\$150,000)		(\$150,000)				(\$2,250,000)
Other - Loan Payments	(\$449,000)	(\$49,000)	(\$50,000)	(\$50,000)			(\$49,000)			(\$400,000)
Other - Shareholder profits	(\$600,000)	(\$100,000)	(\$100,000)	(\$100,000)			(\$100,000)			(\$500,000)
Projected Cash Balance		\$2,254,350	\$1,615,330	\$1,511,273	\$1,283,785	\$1,237,188	\$1,284,422	\$1,936,703	\$2,254,350	(\$357,406)

Cash Flow Balances

Source	Caption
GL - Cash Balance	Current Cash Balance
Accounts Receivable	Accounts Receivable
Customer Orders - Open	Unshipped Customer Orders
Accounts Payable	Accounts Payable
Purchase Orders - Open	Unreceived Purchase Orders
Purchase Orders - Received not I...	Received/Not Invoiced P/O's
Cashflow Expense	Other - Payroll
Cashflow Expense	Other - Loan Payments
Cashflow Expense	Other - Shareholder profits

AR Settings

Age by: Due Date

Calculate customer average days to pay based on rolling 3 months.

Calculation Rules:

1. If no payments have been made within the user defined date range, then the average days to pay will be based on rolling 12 months.
2. If the average days to pay cannot be calculated, then the invoice due date will be used as the cash flow due date.
3. If the calculated cash flow due date is less or equal to the discount days, then the terms discount will be applied automatically.

Reference fields available in drilldown:

Cash Flow Due Dt: The calculated date when cashflow expects an inflow/outflow of money.
 Cash Flow Amount \$: The calculated inflow/outflow amount (with discounts applied according to calculation rules).
 Avg Days to Pay - User Defined: The average days to pay based in rolling X months defined by the user.
 Avg Days to Pay - 12 Month: The average days to pay based on 12 rolling months.

In the example below, I have created non-Macola cash flow entries for payroll, loan payments and profit distributions:

Cash Flow Entry

Cash Flow				Cash Flow Transactions			
Cash Flow Description	Currency Code	Cashflow ID		Cashflow ID	Trx Date	Trx Amount	Trx Description
Payroll	Default	1		1	6/28/2013	(\$150,000)	
Loan Payments	Default	2		1	7/28/2013	(\$150,000)	
Profit Distribution	Default	3		1	8/28/2013	(\$150,000)	
				1	9/28/2013	(\$150,000)	
				1	10/28/2013	(\$150,000)	
				1	11/28/2013	(\$150,000)	
				1	12/28/2013	(\$150,000)	
				1	1/28/2014	(\$150,000)	

Restore settings using a previous day's automatic backup (we watch your back)

This new feature allows you to restore your settings if you accidentally deleted or damaged a report. On the top menu, Go to > Settings > Restore Settings. Click on the date want you want to use and press the 'Restore Settings' button.

Restore User Settings

	Settings Date
1	7/13/2016
2	7/7/2016
3	7/6/2016
4	7/5/2016
5	7/1/2016
6	6/24/2016
7	6/11/2016

NEW SEPARATELY PRICED MODULES

Accurately Recalculate Reorder Levels, Order Up To Levels, Vendor Lead Times & Safety Stock levels (based on your unique rules)

Avoid ordering too early/too late/too much by having accurate reorder levels (min), order up to levels (max), safety stock levels & vendor lead times

- We customize the setup screen to follow your unique inventory rules.
- Many companies set these when the item was initially created and never go back later to be sure it is correct.
- Automate one of the most tedious and inaccurate areas of your supply chain.
- You can optionally override the recommends new levels.

In three easy steps, you can improve the accuracy of your inventory replenishments:

- Based on your unique rules, the program recommends a new reorder level, order up to level and safety stock level.
- You can optionally override the recommended reorder levels, order up to levels and safety stock levels as needed. The program updates your Macola database.
- Update your vendor lead times in your Macola database.

Row ID	Item #	Item Desc	Prod Cat	vend_no	PO Lead Tm	Qty Available	Avg Monthly	3Month Usage	6Month Usage	12Month Usage	Current Min	New Min	Min Difference	Current Max	New Max	Max Difference
595	1981 310016...	1 1/2" PL...	106 168	226	2	22.00	34.67	118.00	208.00	346.00	18	17	-1	36	35	-1
596	1982 310016...	2" PLATE...	106 168	226	3	38.00	55.67	183.00	334.00	1269.00	40	28	-12	60	56	-4
597	1983 310016...	2" BUNA...	106 082	226	4	8.00	13.83	13.00	83.00	89.00	6	7	1	12	14	2
598	1985 310016...	3" BUNA...	106 082	226	3	14.00	6.67	12.00	40.00	91.00	5	3	-2	10	7	-3
599	1994 310017...	2" ID GAT...	106 141	1610	4	41.00	16.00	59.00	96.00	175.00	20	8	-12	120	16	-104

Create purchase orders without tedious, labor intensive manual keying

The PULSE P/O Generator module totally eliminates tedious, labor intensive manual keying of purchase orders based on:

- Your reorder levels,
- MRP Computer Planned Orders (CP orders), or
- Shop floor outside operations

Items to be purchased are displayed based your unique business rules. Click on the items to be ordered. You can optionally override the recommended order quantities.

Order ?	Loc	Rec Ord Qty	O/H	Alloc	O/O	Min Qty	Max Qty	EOQ	P/O mult	Last P/O	Last sale	3-mon	6-mon	12-mon	Last Yr	Unit Cost
	CIN	41	41	0	0	74	111	0	0	5/20/13	263	3,398	3,439	3,307		\$0.00
	CIN	30	30	0	0	54	81	0	0		0	0	0	0	0	\$0.00
	CIN	35	35	0	0	63	94	0	0		0	0	0	0	0	\$0.00
	CIN	115	115	0	0	207	310	0	0		0	0	0	0	0	\$0.00
	CIN	35	35	0	0	63	94	0	0		0	0	0	0	0	\$0.00
	CIN	50	50	0	0	90	135	0	0		0	0	0	0	0	\$0.00

Click the 'Create PO' button to create the draft purchase order. Make any changes needed (you can even change the vendor number). Click the 'SAVE' button to create the Macola released or unreleased order. Purchase orders can now be printed and mailed to the vendor or e-mailed/e-faxed using the Event Manager software.

Create Purchase Order

Order Number 017431

Vendor: 9400 ABC FASTENERS - PURCHASE Buyer/Planner: PB PENNY BAER Order Date: 2/10/2016

Address
 2900 WESTCHESTER AVENUE
 PURCHASE
 NY
 10577

Main Contact
 DAWN RAFFAELI
 Tel 9142519100
 Fax 9142511656

Options
 Payment Terms: N60 NET 60 DAYS
 Status: Unreleased
 Tax Code:
 Ship Via: UPS UPS
 Collect/Prepaid:
 Add Landed Cost
 Confirmation Acknowledgement

Line Items
 Drag a column header here to group by that column

Line #	Item #	Vend Item #	Desc 1	Desc 2	Job Number	Stk Loc	Move-To	Request Dt	Promise Date	UOM	Unit Cost	Unit Weight	Quantity	Notify	Cmt Cd 1	Cmt Cd 2	Comments
1	C635	...	LABELS			CIN	CIN	2/10/16		YD	\$2.68	0.00	41				
2	F603	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	30				
3	F604	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	35				
4	F605	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	115				
5	F606	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	35				
6	F607	...	FRONT HOUSING			CIN	CIN	2/10/16		YD	\$6.25	0.00	50				

Record 1 of 6

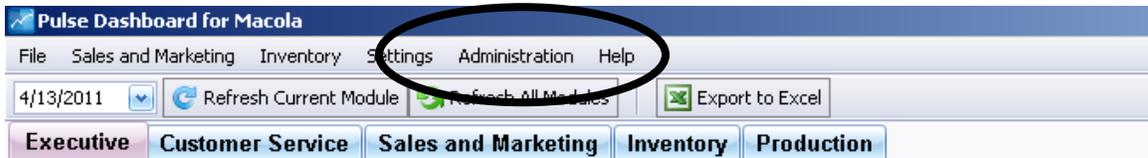
Shipping
 Ship-To: Ew EASY WAY
 FOB: Cl Cincinnati

Totals
 Currency: 0
 Total Cost: \$1,766.00
 Total Weight: 0.00
 Total CBM: 0.00

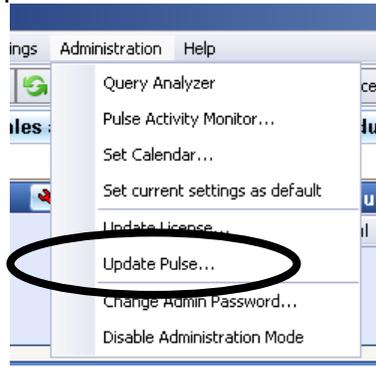
Save

HOW TO UPGRADE TO VERSION 5.19.6 (for PULSE administrators)

1. Upgrade using the admin version (.exe), not the client version (...client.exe)
2. From the PULSE menu bar, select the Administration option.



3. Select the "Update Pulse" option.



4. The Pulse Updater screen will now appear. At the top of the Updater screen, it will show you the version you are currently versus the newest version.
5. NOTE: All other PULSE users do NOT need to exit from the software to perform the update. Each user will be upgraded automatically the next time they restart the dashboard software.
6. Click on the "Update Pulse" button at the bottom of the Updater screen. The update will be automatically downloaded from the Internet and takes less than 30 seconds. Once the update is completed, your PULSE software will automatically restart.

ADDITIONAL INFORMATION

We offer unlimited phone and e-mail support for all of our family of PULSE software products to companies that have paid their annual software maintenance and support fee. Our support desk consultants are also Macola software experts. You can e-mail us at Support@PulseDashboard.com, Go to > Help > About or call (513) 723-8095.

All of our software products run using Macola Progression, ES or 10.

Visit us at www.PulseDashboard.com

If you would like information or a demonstration of any of our software products or services, please contact Terry Lanham at TLanham@LeahyConsulting.com or (513) 723-8091

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Since 1981, Leahy Consulting has been helping manufacturers and distributors to significantly improve their accounting information systems and workflow. We are part of the Esta Group, an authorized Exact Macola reseller with offices in Ohio, Michigan, Iowa, California and Australia.