



Take charge of your business with PULSE Dashboard Reporting Software

Customer Service Module

PULSE DASHBOARD is revolutionary software that lets you leverage your Macola® investment in a new way —with real-time display of 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 Financial, Customer Service, Sales and Marketing, Inventory, Purchasing, Production and Material Requirements.

PULSE Dashboard adds value to your Macola® investment

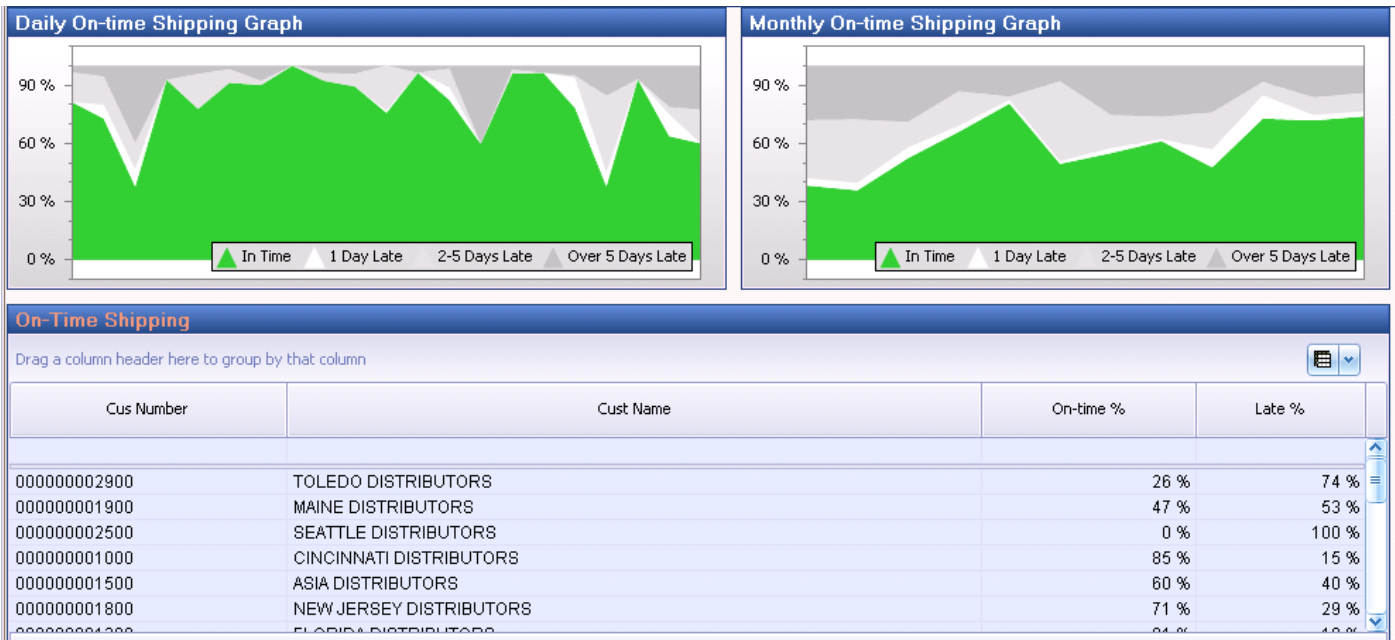
- Manage with real-time data, on-screen, company-wide, all the time
- Inconsistencies between reports from different departments are eliminated
- Important metrics not found in standard Macola® software
- One-click drill-down to view details & One-click report writer generates custom reports
- Export all data to Excel/printer/PDF/e-mail
- Installation & training in an afternoon

PULSE Customer Service gives you capabilities not available elsewhere

- On-time Shipping – A graph in addition to a detailed chart with drill-down
- Items Causing Shortages – This screen time-phases your customer orders versus pending replenishment production or purchase orders. It displays customer orders that cannot be shipped by the customer's requested ship date.
- Top Credit Memo Customers and Items – See those customers and inventory items that generate the most credit memos.
- All of the screens and charts from the Executive module for that track bookings, shipments and gross margin with comparisons to the prior year and budget.
- Create Customer Orders in Macola from PULSE Dashboard.
- Drill-down into any metric to view the underlying details.
- The PULSE Column Chooser allows you to select just the columns you want to display.
- Sort and/or filter on any column.
- Screens can be maximized for easier viewing.
- Anything you see on the screen can be exported to Excel or PDF, printed or e-mailed from PULSE Dashboard.

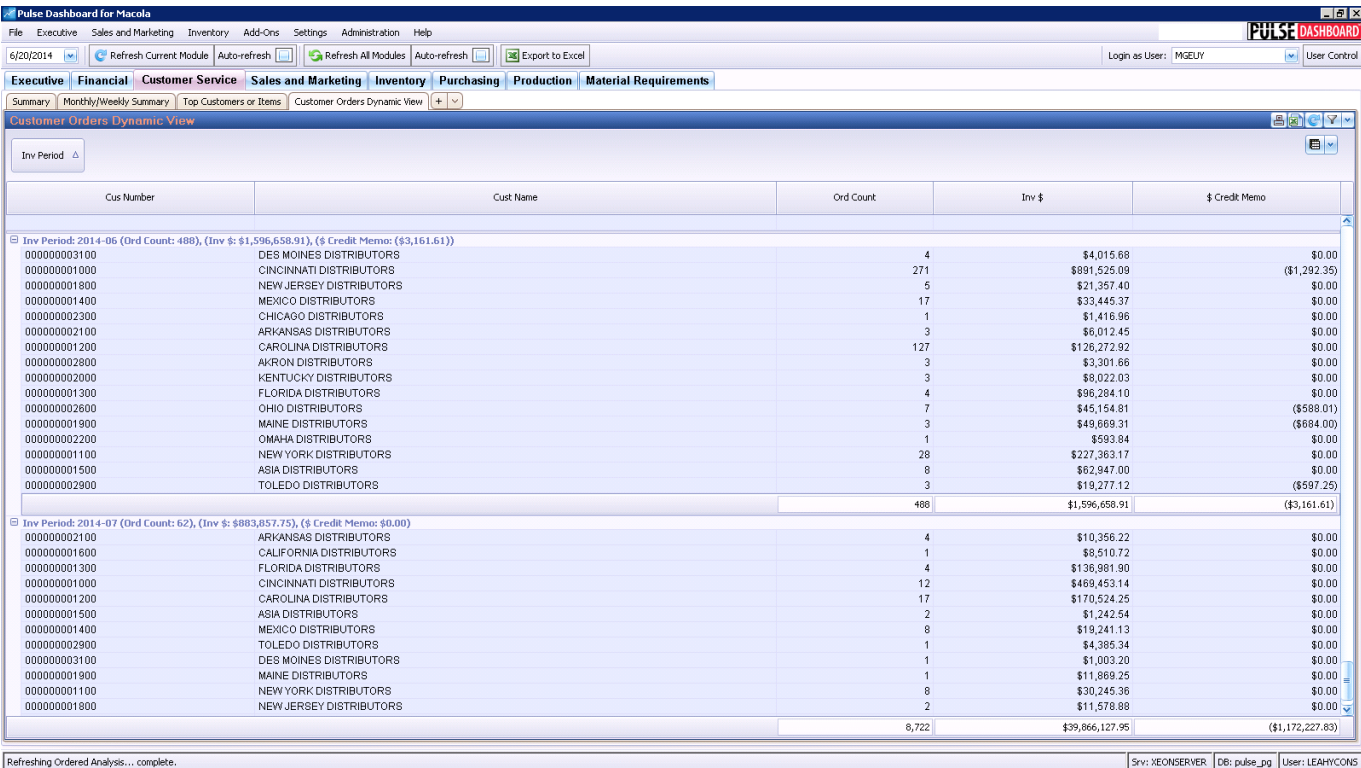
PULSE measures On-time Shipping

All graphs and charts offer full drill-down for further analysis, printing, exporting to excel or e-mailing.



PULSE can easily Summarize Order Information by Customer by Period

Using the Customer Order Dynamic View detailed reports can be created to show many levels of detail for new orders entered or invoiced orders. This can be by Item, Customer, Product Category, Salesperson or Period.



PULSE pinpoints Inventory Items Causing Shipping Shortages

This unique screen is an 'MRP system' just for customer orders that need to be shipped. For example, you may want to review items scheduled to ship over the next 14 days for which you do not have sufficient on-hand quantities or a production order or purchase order that will replenish your inventory to meet the customer's requested delivery date.

Items On Customer Orders That Are Causing Shortages											
Drag a column header here to group by that column											
Location	Byr Plnr	Item #	Item Description 1	Earliest Demand	Earliest Replenish	O/H Qty (Loc)	MRP - Calc Demand Qty	MRP - Calc Replenish Qty	MRP - Demand Orders Count	MRP - Replenish Orders Count	MRP - Net Qty O/H (Loc)
CIN		9845-54010	WHEEL	6/6/14	6/20/15	6	54	60	10	3	12
CIN		6391-3251	TURNABLE PULLEY BE...	6/13/14	7/14/15	0	11	8	11	3	-3
CIN		6391-5439	TURNABLE PULLEY BE...	6/16/14	5/28/15	0	15	16	13	3	1
CIN		6391-3090	TURNABLE PULLEY BE...	6/11/14	7/14/15	0	16	17	15	3	1
CIN		6390-5425	TURNABLE PULLEY BE...	6/16/14	7/14/15	0	20	17	18	3	-3
CIN		6391-3089	TURNABLE PULLEY BE...	6/10/14	5/29/15	0	19	17	18	4	-2
CIN		6391-3091	TURNABLE PULLEY BE...	6/12/14	5/19/15	0	19	20	18	4	1
CIN		9846-54010	WHEEL	6/6/14	6/20/15	2	50	66	21	4	18
CIN		9847-54010	WHEEL	5/6/14	6/26/15	3	53	61	21	3	11
29							545	567	219	63	

By drilling-down on an item, you will see a time-phased list of customer orders along with associated replenishment production orders or purchase orders. The result is an effective way to manage customer order shortages.

Items On Customer Orders That Are Causing Shortages									
Item # = 6391-3251 AND Location = CIN									
Drag a column header here to group by that column									
Location	Item Description 1	MRP - Ord Type	Cus Number	Vend #	MRP - Ord #	MRP - Ord Dt	MRP - Demand/Replenish Date	MRP - Qty Demand/Replenish	MRP - New Qty On-Hand (Loc)
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00222360	5/30/14	6/13/14	-1	-1
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00225232	6/11/14	6/25/14	-1	-2
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00225912	6/16/14	6/30/14	-1	-3
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00226286	6/17/14	7/1/14	-1	-4
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00229130	6/30/14	7/15/14	-1	-5
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00229376	7/1/14	7/16/14	-1	-6
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00229427	7/1/14	7/16/14	-1	-7
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00230245	7/7/14	7/21/14	-1	-8
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00232009	7/16/14	7/30/14	-1	-9
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00232275	7/17/14	7/31/14	-1	-10
CIN	TURNABLE PULLEY BELT	Customer (Demand)	000000001000		00232761	7/21/14	8/4/14	-1	-11
CIN	TURNABLE PULLEY BELT	Production (Replenishment)			00214428	6/12/14	7/14/15	2	-9
CIN	TURNABLE PULLEY BELT	Production (Replenishment)			00216600	6/27/14	8/4/15	4	-5
CIN	TURNABLE PULLEY BELT	Production (Replenishment)			00218877	7/15/14	8/5/15	2	-3

PULSE tracks credit memos by Customer and Item

Credit memos can indicate if your customer is ordering the wrong product, if you shipping them the wrong product, if the product is damaged in shipping, if your customer is damaging the product, etc. You can drilldown to view or print the details.

Top Credit Memos Customers					
Drag a column header here to group by that column					
	Cus Number	Cust Name	Ord \$	Inv \$	\$ Credit Memo
>	1 000000001900	MAINE DISTRIBUTORS	\$318,327.90	\$318,183.93	(\$5,127.70)
2	000000001500	ASIA DISTRIBUTORS	\$813,293.46	\$813,073.10	(\$6,101.52)
3	000000001700	CANADA DISTRIBUTORS	\$519,683.37	\$519,683.37	(\$6,160.00)
4	000000002300	CHICAGO DISTRIBUTORS	\$194,026.21	\$194,026.21	(\$6,807.23)
5	000000001200	CAROLINA DISTRIBUTORS	\$2,109,580.47	\$2,109,482.70	(\$7,747.62)
6	000000001800	CALIFORNIA DISTRIBUTORS	\$243,624.10	\$241,849.46	(\$40,675.21)
7	000000001800	NEW JERSEY DISTRIBUTORS	\$426,102.40	\$425,657.40	(\$41,545.52)
8	000000001300	FLORIDA DISTRIBUTORS	\$3,265,868.34	\$3,221,328.94	(\$47,753.16)
9	000000001100	NEW YORK DISTRIBUTORS	\$4,010,699.06	\$4,009,143.18	(\$150,223.62)
10	000000001000	CINCINNATI DISTRIBUTORS	\$6,666,076.56	\$6,606,966.00	(\$481,571.21)
			\$18,567,281.87	\$18,459,394.29	(\$793,712.79)

Top Credit Memos Items					
Drag a column header here to group by that column					
	Item #	Item Description 1	Ord \$	Inv \$	\$ Credit Memo
>	1 8010-C544	MOTOR	\$3,937.20	\$3,937.20	(\$9,257.82)
2	8058-3235	MOTOR	\$9,612.00	\$9,167.00	(\$9,612.00)
3	7217I	SHAFT	\$86,949.60	\$86,949.60	(\$10,184.28)
4	2360-C885	WHEEL PROTECTOR	\$104,864.00	\$98,423.00	(\$12,678.60)
5	6786-F802	HOUSING	\$13,427.50	\$13,427.50	(\$13,755.00)
6	7213I	SHAFT	\$71,933.04	\$71,933.04	(\$17,592.00)
7	6291-5453	V-IDLER PULLEY	\$16,405.20	\$12,437.20	(\$19,224.00)
8	6291-48009	V-IDLER PULLEY	\$21,357.76	\$12,181.76	(\$22,816.00)
9	6290-48009	V-IDLER PULLEY	\$103,488.00	\$72,336.00	(\$77,616.00)
10	NPN	DO NOT USE	(\$521,680.20)	(\$521,680.20)	(\$534,148.24)
			(\$89,705.90)	(\$140,887.90)	(\$726,883.94)

Create Customer Orders in Macola from Pulse Dashboard

The ability to add a Purchase Order, POP Production Order or a Customer Order from PULSE Dashboard to Macola is available. On any Item Number or Customer Number listed on any report simply rt-click to display the menu listing Macola Processes and the User has the ability to enter a Customer Order for the item. Additional items may also be added to the order as needed. This process is available from any report in any module that displays the Item Number or Customer Number column.

Pulse Dashboard for Macola

File Executive Sales and Marketing Inventory Add-Ons Settings Administration Help

6/20/2014 Refresh Current Module Auto-refresh Refresh All Modules Auto-refresh Export to Excel

Executive Financial **Customer Service** Sales and Marketing Inventory Purchasing Production

Summary Monthly/Weekly Summary Top Customers or Items Customer Orders Dynamic View

Top Invoiced Customers

Drag a column header here to group by that column

	Cus	Cus Number: 000000001000	Cust Name	Ord \$	Inv \$	\$ Credit Memo
1	000000	Shared Tabs	TRIBUTORS	\$6,666,076.56	\$6,606,966.00	(\$481,571.21)
2	000000	Permanent Tabs	TRIBUTORS	\$4,010,699.06	\$4,009,143.18	(\$150,223.62)
3	000000	Apply to Report	TRIBUTORS	\$3,265,868.34	\$3,221,328.94	(\$47,753.16)
4	000000	Macola Processes	TRIBUTORS	\$2,109,580.47	\$2,109,482.70	(\$7,747.62)
5	000000	Copy Value	TRIBUTORS	\$813,293.46	\$813,073.10	(\$6,101.52)
6	000000	Enable Cell Selection	TRIBUTORS	\$519,683.37	\$519,683.37	(\$6,160.00)
7	000000		TRIBUTORS	\$426,102.40	\$425,657.40	(\$41,545.52)
8	000000		TRIBUTORS	\$322,133.21	\$322,133.21	(\$2,000.20)
9	000000001900	MAINE DISTRIBUTORS		\$318,327.90	\$318,183.93	(\$5,127.70)
10	000000002500	SEATTLE DISTRIBUTORS		\$255,412.50	\$255,412.50	\$0.00

When the User selects the option to Create OE Order, a screen is displayed to enter the Customer, Item Number, quantity and price to order. When finished, select Save and the Order is added to Macola where it is processed as any other order would be.

Create / Edit Sales Order

Order Number

Customer: 000000001700 User Name: mgeuy Order Date: 7/6/2017 Shipping Date:

Billing Address
CANADA DISTRIBUTORS
1250 TECHNY ROAD
ATTN: IMPORT DEPARTMENT
NORTHBROOK IL 60062
USA

Shipping Address
CANADA DISTRIBUTORS
621 LINCOLN COUNTY PARKWAY EXT
LINCOLNTON NC 28052-0000
USA

Options
Sales Person: 01 House Account
Payment Terms: TT WIRE TRANSFER

Line Items

Line #	Item #	Customer Item #	Location	Description 1	Description 2	Quantity	Unit Price	Unit Of Measure	Total
1	003-E3000-0054		CIN	WHEEL		1	\$39.15	EA	\$39.15

Record 1 of 1

Salestax
Taxable Order: ☐ Tax Code: NA None 0.0000

Shipping
Ship Via: IMP DIRECT IMPORT
Freight Charges: \$0.00
Instructions 1:
Instructions 2:

Order Totals
Sub Total: \$39.15
Shipping: \$0.00
Sales tax: \$0.00
Grand Total: \$39.15

Delete Order View Header Comments Settings Save

**For questions or to schedule a demonstration,
call Terry Lanham in Cincinnati at (513) 723-8091**

Visit www.PulseDashboard.com

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