

Take charge of your business with PULSE Dashboard Reporting Software

Purchasing 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

The screenshot displays the PULSE Dashboard interface for the Purchasing Module. The top navigation bar includes menus for File, Executive, Sales and Marketing, Inventory, Add-Ons, Purchasing, Settings, Administration, and Help. Below this, there are tabs for Executive, Financial, Customer Service, Sales and Marketing, Inventory, Purchasing (selected), Production, and Material Requirements. The main content area is divided into several sections:

- Open Purchase Orders:** A summary table showing current orders (\$13,115, 49 orders, 3%), next 30 days (\$0, 0 orders, 0%), next 60 days (\$0, 0 orders, 0%), and over 60 days (\$406,840, 53 orders, 97%). Total orders are 102.
- Purchasing Exception Items:** A table listing categories such as 'Purchase items with no cost' (10), 'Purchase items with no buyer/planner code' (83), 'Purchase items with no primary vendor' (150), and 'Purchase items with no P/O lead time' (149).
- Purchasing Exception Orders:** A table listing categories like 'P/O's fully received, but not closed' (24), 'Open P/O's lines with no unit price' (2), and 'P/O's not printed' (25).
- Purchase Orders Scheduled to be Received:** A detailed table with columns for PO Ord #, Vend #, Vend Name, Ord Dt, Promise Dt, Request Dt, Item #, PO Item Desc 1, Qty Ordered, Received Qty, Total \$, and PO Remaining Qty. It lists items from various vendors like Shimani Corporation and Compagnolo Manufacturer.
- Top Vendors:** A table listing vendors and their total receipts, such as Shimani Corporation (\$33,509), Trendy Products Co. (\$5,638), and Heritage Leasing (\$1,112).
- Purchase Order Receipts - Past 10 Days:** A table showing receipts for items like COM3, BPADES, LANDED, COM-LOT, COM-LOT, COM1, BELL, and BELL from vendors like Shimani Corporation.
- Vendor List:** A table listing vendors with their names, cities, states, and zip codes, including Shimani Corporation (Irvine, CA), Spinerly Manufacturing (Wilton, CT), and JO JO Industries (Las Vegas, NV).

PULSE Purchasing gives you information probably not seen before:

- Vendor Performance is measured for on-time delivery and inspection statistics
- Reorder Advice Reports may be customized to suit specific needs
- Scheduled to be Received will provide a concise view of all items due to be received
- Age Open Purchase Orders to help with an overall cash flow analysis
- Purchase Order Exceptions will show important exceptions such as missing costs and but not closed orders
- Receipts over the past X days will list all items that have been received in the past period of time
- Top Vendors displays a list for various time periods for payments to vendors

PULSE offers Optional functionality to extend the value to your Macola® and PULSE Dashboard investment

- Purchase Order Generator Module allows the User to define detailed, specific rules to create Purchase Orders in Macola. Include variables such as Lead Time, Min/Max, EOQ and other parameters used to generate Purchase Orders.
- The most tedious, labor intensive and error-prone area of Macola has been totally eliminated.
- P/O Generator suggests what items need to be purchased based on your unique business rules.
- Click on the items you want to order and it automatically creates the Macola purchase order.
- Use Event Manager to automatically e-mail or fax purchase orders to your vendors.

Pulse Dashboard Purchasing answers all of the questions

Information such as “Who are our Top Vendors?”, or “What are our Top Purchased Items?”, “Has it been received yet?”, “When is it due in?”, “What will be the Cash Demand Next Month” and many more can now be quickly answered.

PULSE offers a Purchasing Reorder Advice Report

This report is easily customizable to create a Reorder Advice Report to meet your unique needs. Choose the columns of data to display as well as the selection criteria. Sort or filter on each column and re-arrange the columns as needed.

Item #	Item Description 1	Location	O/H Qty (Loc)	On-Ord Qty (Loc)	Qty Allocated (Loc)	Net Qty (Loc)	Reorder Lvl	Safety Stk	Months O/H (Loc)	PO Lead Tm	Usage Qty - 12 Month Total (Loc)
63498-5410	FLAT IDLER PULLEY	CIN	0	0	0	0	0	0.0000	0.0	14	202.0
63498-5425	FLAT IDLER PULLEY	CIN	7	0	7	0	0	0.0000	9,999.0	14	0.0
6350-3089	FLAT IDLER PULLEY	CIN	7	12	8	11	0	0.0000	0.3	14	262.0
6350-3090	FLAT IDLER PULLEY	CIN	35	30	12	53	0	0.0000	0.8	14	498.0
6350-3091	FLAT IDLER PULLEY	CIN	19	0	1	18	0	0.0000	1.5	14	148.0
6350-3251	FLAT IDLER PULLEY	CIN	21	16	16	21	0	0.0000	1.7	14	150.0
6350-3693	FLAT IDLER PULLEY	CIN	5	12	4	13	0	0.0000	0.3	14	176.0
6350-3995	FLAT IDLER PULLEY	CIN	0	0	0	0	0	0.0000	0.0	14	0.0
6350-48009	FLAT IDLER PULLEY	CIN	0	0	0	0	0	0.0000	0.0	14	195.0
6350-5410	FLAT IDLER PULLEY	CIN	22	0	1	21	0	0.0000	1.3	14	200.0
6350-5413	FLAT IDLER PULLEY	CIN	0	0	0	0	0	0.0000	0.0	14	95.0
6350-5420	FLAT IDLER PULLEY	CIN	6	0	0	6	0	0.0000	0.9	14	84.0
6350-5425	FLAT IDLER PULLEY	CIN	0	0	0	0	0	0.0000	0.0	14	221.0

PULSE Dashboard Purchasing measures Vendor Performance

View on-time delivery and inspection statistics by vendor and compare to all vendors.

Vend #	Vend Name	Late Receipts Count	Rejected Receipts Count	Total Receipts Count	% Receipts Late	% Promise Dt > Request Dt
000000003000	CHICAGO UNION SUPPLY	2,495	0	4,399	57 %	1 %
000000003100	CHAMPION SUPPLY	12	0	13	92 %	0 %
000000003200	STAPLES	3	0	5	60 %	0 %
000000003300	HOME DEPOT	1	0	1	100 %	0 %
000000003500	CINCINNATI BEST COMPANY	11	0	13	85 %	0 %
000000003700	CINCINNATI SHIPPING	1	0	1	100 %	0 %
000000004300	DELTA PACKAGING	3	0	4	75 %	100 %
000000004500	CINCINNATI BOX COMPANY	1	0	2	50 %	0 %
000000004600	CINCINNATI SHIPPING	8	0	8	100 %	100 %
000000004700	CINCINNATI CLEANING	12	0	13	92 %	8 %
000000004800	CHICAGO BOX COMPANY	74	0	108	69 %	59 %
000000004900	ATLANTA BOX COMPANY	11	0	11	100 %	0 %
000000005300	ABC FASTENERS - YORBA LINDA	6	0	9	67 %	22 %
		7,561	0	13,734		

Drilldown on a specific Vendor to further analyze the receipt transactions for individual receipt transactions and compare the Vendor to the performance of All Vendors for a Period.

Vendor Summary

Refresh Data From: 6/1/2007 To: 6/20/2008

Summary Receipt Details Receipt Details (All Vendors)

CHICAGO UNION SUPPLY Receipts Breakdown

Period	Total Receipts	Late Receipts	Rejected Receipts	% Late	% Rejected
06/2007	30	0	0	0 %	0 %
07/2007	25	0	0	0 %	0 %
08/2007	20	0	0	0 %	0 %
09/2007	8	0	0	0 %	0 %
10/2007	34	0	0	0 %	0 %
11/2007	107	0	0	0 %	0 %
12/2007	41	0	0	0 %	0 %
01/2008	75	0	0	0 %	0 %
02/2008	70	0	0	0 %	0 %
03/2008	215	0	0	0 %	0 %
04/2008	138	0	0	0 %	0 %
05/2008	255	0	0	0 %	0 %
06/2008	139	0	0	0 %	0 %
Totals	1,157	0	0	0 %	0 %

All Vendors Receipts Breakdown

Period	Total Receipts	Late Receipts	Rejected Receipts	% Late	% Rejected
06/2007	132	0	0	0 %	0 %
07/2007	98	0	0	0 %	0 %
08/2007	61	0	0	0 %	0 %
09/2007	65	0	0	0 %	0 %
10/2007	149	0	0	0 %	0 %
11/2007	236	0	0	0 %	0 %
12/2007	203	0	0	0 %	0 %
01/2008	329	0	0	0 %	0 %
02/2008	287	0	0	0 %	0 %
03/2008	480	0	0	0 %	0 %
04/2008	528	0	0	0 %	0 %
05/2008	606	0	0	0 %	0 %
06/2008	429	0	0	0 %	0 %
Totals	3,603	0	0	0 %	0 %

CHICAGO UNION SUPPLY Rejection Breakdown

Vendor #	Rejection Description	Rejection Code	Occurrences

All Vendors Rejection Breakdown

Rejection Description	Rejection Code	Occurrences

Create Purchase 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 in standard Pulse Dashboard. On any Item Number listed on any report simply rt-click to display the menu listing Macola Processes and the User has a choice of entering an Unreleased or Released Purchase 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 column.

Pulse Dashboard for Macola

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

1/19/2016 Refresh Current Module Auto-refresh Refresh All Modules Auto-refresh Export to Excel

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

Summary Inventory Status Item Details View Physical Inventory Inventory Transactions

Inventory Status

Drag a column header here to group by that column

Loc	Item #	Cat - Prod Cat Cd	Item Pur or MFG	O/H \$	O/H Qty (Loc)	On-Ord Qty (Loc)	Qty Allocated (Loc)	Months O/H (Loc)	Usage Qty -
MA	CLAMP	SP	P	\$2,449	2,449	0	15	29,388.1	
MA	Item #: COM1	A	M	(\$5)	-1	0	0	-12.0	
MA			P	\$30,130	3,013	10	142	-11.4	
MA		SP	P	\$1,878	939	10	2	5,634.0	
MA		AB	M	\$1,071,660	1,011	69	51	12,132.0	
CA		SP	P	\$6	618	0	2	741.6	
MA				\$39,072	4,884	0	12	58,608.2	
MA				\$304	304	0	72	608.0	
MA				\$15,904	994	0	14	11,928.0	
MA				(\$180)	-4	1,300	1,258	-12.0	
MA	FORK	SP	P	\$43,500	435	0	140	2,610.0	
MA	PSEATASSY	ASM	M	\$70,910	1,013	15	38	6,078.0	
MA	HBASSY	ASM	M	\$0	0	17	123	0.0	
MA	BCABASSY	ASM	M	\$76,224	794	0	117	4,764.0	
MA	PFRAMEASSY	ASM	M	\$236,500	946	0	38	5,676.0	
MA	BOLT	SP	P	\$41	10,220	20	1,260	9,990.0	

Context menu for Item #: COM1:

- Shared Tabs
- Permanent Tabs
- Apply to Report
- Macola Processes
 - Create POP Order
 - Create Purchase Order
 - Create OE Order
- Copy Value
- Enable Cell Selection

When the User selects the option to add a Purchase Order, a screen is displayed enter the Vendor, Item Number, quantity and price to order. When finished, select Save and the Order is added to Macola where it is released or printed as any other PO would be.

Order Number 131

Vendor: 100 Shimani Corporation Buyer/Planner: 0 Hour planning Order Date: 1/19/2016

Options: Payment Terms: 30 Net 30 Status: Unreleased Tax Code: Collect/Prepaid: Add Landed Cost:

Address: West Bend Corporate Park, 2, Holland Drive, Irvine, CA, 92618

Main Contact: Peggy Schoen, Manager, Peggy@shimani.com, Tel 909-567-9494

Line Items

Line #	Item #	Δ	Vend Item #	Desc 1	Desc 2	Job Number	Stk Loc	Δ	Move-To	Request Dt	Promise Date	UOM	Unit Cost	Unit Weight	Quantity	Notify	Cmt Cd 1	Cmt Cd 2	Comments
1	COM1	...	STUFF	...	COMPONENT ITEM 1	...	MA		MA	1/29/16	1/19/16	EA	\$10.00	0.00	⊗				

Record 1 of 1

Shipping: Ship Via: Ship-To: MFG Mfg Plant FDB: CA California

Totals: Total Cost: \$0.00 Total Weight: 0.00 Total CBM: 0.00

Save

Please call our PULSE support desk us with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

We encourage your phone calls with suggestions for making our software work better for your organization. We also offer custom modifications, but if your suggestions will be applicable to other users, they are made at no charge.

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