Pulse Dashboard & Reporting Software Definitions
Sales & Marketing Field Selection Guide

The Sales and Marketing Module of Pulse Dashboard as a default contains several Reports and Tabs for Budget Booking Invoicing and Credit Memo tracking. The strength of the Module is the ability to analyze Sales History in ways not usually found in a standard ERP application. As an example, the Sales Analysis Report that is added from this module has over 1,200 predefined Columns to select from when creating reports to analyze Sales information. Many of these Columns listed in the Column Chooser are from the ERP system in use while the other available Columns are only available in Pulse Dashboard.

Sometimes the abbreviations used on reports can be confusing so we have created this guide as an explanation of abbreviations used in Pulse Dashboard.

Date Range Naming Conventions

Columns that display summarized data based on date ranges such as Year To Date or Month To Date are available to add to reports in the Column Chooser. The column headings that appear on the report are abbreviated to appear on the report but sometimes the abbreviations are confusing at first. Here is a list of these Date range acronyms and know that these can be combined as demonstrated in the examples bellow:

PY-YTD: Prior Year-Year to Date
PM-ME: Prior Month-Month End

Acronym	Definition
YTD	Year To Date
YE	Year End
QTD	Quarter To Date
QE	Quarter End
MTD	Month To Date
ME	Month End
PY	Prior Year
PQ	Prior Quarter
PM	Prior Month

Sales Budget Columns

Column Caption	Full Column Caption
Inv Bud $	Invoiced Budget $
Inv Qty	Invoiced Quantity
Book $	Booked $
Book Qty	Booked Quantity
Margin Bud $	Margin Budget $
Avg Unit Price Bud $	Average Unit Price Budget $

O/E History and Open Columns

Column Caption	Full Caption
Inv $	Invoiced $
Inv Qty	Invoiced Quantity
Book $	Booked $
Book Qty	Booked Quantity
CM $	Credit Memo $
CM Qty	Credit Memo Quantity
Margin $	Margin $
Open Ordered Qty	Open Ordered Quantity
(MTD Inv)+(ME Open) $	(MTD Invoiced) + (ME Open Ordered) $
(MTD Qty)+(ME Open) Qty	(MTD Invoiced) + (ME Open Ordered) Quantity

Other Calculated Columns

Column	Calculation
Booked $ Already Invoiced Booked Qty Already Invoiced	Booked data that is in the history file. It consists primarily of orders that are closed, but it also includes the partially invoiced data from open orders that have been partially shipped.
Invoiced $ (using order date) Invoiced Qty (using order date)	Invoiced data for orders where order date falls within the chosen date range. This differs from the normal Invoiced $/Qty where the date range is applied to the invoice date.
Lost Booked $ Lost Booked Qty	(Booked Already Invoiced) – (Invoiced (using order date))

Sales and Marketing Budgets

Pulse automatically identifies which entry type to retrieve data based on what fields are used in each report. Each report will also calculate totals based on any combination of fields that are compatible with budget reporting. Any fields from the following Macola tables are compatible with budget reporting:

Entry Type	Customer Master	Salesperson Master	Item Master	Product Category	Customer Alternate Address Master
Customer	X	X*			
Salesperson		X			
Item			X	X	
Customer/Item	X	X*	X	X	
Customer/Alt Add/Item	X	X*	X	X	X

*The sales person budget will be defined by the default sales person for each customer.

Customer Entry Report Examples

PULSE Dashboard & Reporting Software Definitions

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