

PULSE Dashboard & Reporting Software Fundamentals Training

(Updated May 2020)

Note that we offer unlimited group or one-on-one training and unlimited phone support.

Getting started with PULSE Dashboard

PULSE Dashboard allows you to create custom reports from your ERP data without the need for technical knowledge. We give you many 'out of the box' content reports and allow you to customize them to meet your unique needs. We even offer a 'Designer' module where individuals with SQL programming skills can develop their own reports.

Here are some suggestions to get started:

- You may feel overwhelmed with your data that needs to be corrected.
- Spend 15 minutes a day for a few weeks getting comfortable with the screens.
- Pinpoint the top 10 screens you want to start using in your job.
- You cannot accidently change someone else's screens.

Obtaining technical support

- You have unlimited phone/e-mail support and training with PULSE Dashboard.
- Contact us are (513)723-8095 or Support@PULSEDashboard.com

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Top 10 ways that PULSE bring you the right information

This list pinpoints the top ten areas within our PULSE Dashboard software, based on customer feedback.

- 1. Top level overview of pending and invoiced customer orders
- 2. Cash flow forecasting
- 3. On-time customer shipments analysis
- 4. Pinpointing finished goods shortages and pinpointing production shortages
- 5. Customer sales vs. your forecast (ability to analyze anything)
- 6. Inventory status (trends, months on-hand, activity, etc.)
- 7. Product costing analysis by month
- 8. Eliminate manual keying of purchase orders
- 9. Past Due Purchase Orders and pinpointing orders to be closed

10. Customize any report with no technical knowledge & without assistance from your IT staff

As a new user, where should I focus?

- Sorting
- Filtering
- Grouping
- Using the Column Chooser
- Right-mouse button options

If you can master the above five items, you can create or modify most any report.

Refreshing data

After starting PULSE Dashboard, the reports will need to be populated with values from your ERP software. This is done by refreshing the data.

- Refresh Current Module or Refresh All Modules click on the button at the top of the screen. This reads the data from the database and populates the reports in PULSE Dashboard for either the current module that you are in or for all modules that appear on the menu.
- Refreshing every X minutes click on one of the 'Auto-refresh' buttons next to Refresh Current Module or Refresh All Modules at the top of the screen and select the desired number of minutes. This may be set to a value between 60 and 1 minute. If the amount of time is set to a value less than the time that it takes to refresh, the system will never stop refreshing. Do a test refresh prior to setting this. It starts once you click 'OK'.
- Manual refreshing each report Use the Sel icon in the report header or double-click on the blue report header bar at the top of each report.
- Manual refreshing each tab Use the right-click and select Refresh Tab or double-click on the tab header.
- Recommendation Turn OFF the auto refresh option for all tabs that are not used every day or if your refresh times are long. Right-click on the tab name and un-check the 'Refresh with Module' check-box to make that a manually refreshed tab. This will improve overall performance when refreshing the Current Module or All Modules.

Customizing existing screens

Becoming proficient in PULSE Dashboard is not difficult. The more time spent using it the more comfortable the User will become with it. By mastering these functions the User will be able to change existing and create new reports for themselves and others quickly. A full explanation of all of these functions is provided below.

- Use the Column Chooser to change which columns are displayed on the report from a list of columns pertaining to that report
- Sort data retrieved from A to Z, Z to A, highest to lowest or lowest to highest
- Create filters to narrow the amount of data on a report to specific values retrieved from the total amount of data available
- Use Save & Share to share your screen layouts with others
- Publish tabs with multiple reports to "push" your screens to others

Report Icons

On each PULSE Dashboard screen, you will see several icons in the upper right corner of the report. These are used to control the information on this specific report. These icons will be seen throughout the system.

Open Purch	ase Orders	8		4 • 7 •	
	Amount	Ord	ers	%	
Current	\$52,512		2	100 %	
Nevt 20 Dave	0.2		0	0.%	

8

The Print icon will allow you to print the report, export the information to several different formats (including PDF, CSV and others) and to email information directly from the report.



The Excel icon will allow you to export the data on the report to Excel exactly as it appears on the report. All Report headers and column headers will also be exported. This is the easiest method to get information to Excel. Further manipulation of the data can occur in Excel by adding additional User defined columns to the spreadsheet, formulas and additional Excel functions as needed. Results from the spreadsheet do not post back to your ERP database or PULSE Dashboard. When you press the 'Export to Excel' button, PULSE Dashboard allows you to specify the file location and name. It then asks if you would like to open the file. If you answer 'yes', Excel is launched and your data is displayed.

*The Excel icon at the top of the screen near the Refresh All Modules button is not specific to a single report and has a different function. Using this button will take a screen image of all reports on the current tab and paste this as an object onto a new Excel worksheet. The values may not be manipulated nor used in formulas. This function is designed to capture a static "snapshot" of information at a given point in time and to be saved for future reference or sent via email.

The Setup (or Red Wrench) icon allows the User to control various settings on the report such as dates used as a basis for calculations, number of months to see, accounts to use and many others. The settings available on is icon will vary greatly by report as all reports differ in use and will have different parameters.

The Filter icon will allow the User to narrow the amount of information retrieved from the database based on one or more columns and their contents. For example, two filters might be created to only view a specific value or range of values for (1) a Salesperson and (2) their Customers by State. (i.e. Joe Smith and Texas)

Adding New Tabs

Custom Tabs may be added within each module with reports added which allows the User the ability to group standard or custom reports in a way that works best for them. Tabs can then be Shared with or Published to other Users as needed.

New Tabs may be added by using the "+" icon near the end of the row of existing tabs in a module. The New Tab will have no reports on it and the User can copy existing reports or add new reports as needed.

📶 Pulse Dashboard for Macola				
File Executive Sales and Marketing Inven	ntory Add-Ons Settings Administi	ration Help		
7/23/2015 💽 🥑 Refresh Current Module	e 🛛 Auto-refresh 🔲 🔄 Refresh All	Modules Auto-refresh 🔲 🛛	Export to Excel	
Executive Financial Customer Se	ervice Sales and Marketing	Inventory Purchasing	Production	Material Requirements
Summary GL Control + V				

By using the right mouse button in an area outside of a report on the tab, the User can rename or otherwise control the actions of the new tab.



If another User has shared a Tab from their PULSE Dashboard screens it may be added by using the "V" icon to select the Tab(s) that has been shared to the User (two example tabs are shown).

🜌 Pulse Dashboard for Macola				
File Executive Sales and Marketing Inventory	Add-Ons	Administration Help		
7/23/2015 💽 🧭 Refresh Current Module Auto-	refresh [Refresh All Modules Auto-refresh	n 🔲 🛛 🗷 Export to Excel	
Executive Financial Customer Service	Sale	rketing Inventory Pur	chasing Production	Material Requirements
Summary GL Control + V				
Current Balances 🤱 Service Invoices		mer Orders Summary		
Relance Caption 🤱 Split Commission		MTD Actual MTD B	Judget YTD Actual Y	TD Budget M/E Prior Year YTD
balance caption	9	ł		

Adding New Reports

A new report may be added to a Tab in multiple ways:

- Use the right mouse button on the Tab and select Add New Report
- Use the right mouse button on the Tab and select Add Shared Report
- Copy an existing report from another any Tab or Module in Dashboard

Modifying Reports

In addition to the report icons described earlier, the Column Chooser is also available on many reports or sub-reports.

a column header here to group by that column								
Cust #	Current	1-30 Days	31-60 Days	Over 60 Days	Inv \$			

The Column Chooser will allow the User to change the columns that appear on the report based on a list of columns associated with that report. Columns selected for the report may be added, deleted or re-arranged on the report. Custom Formula columns may also be defined and added to the report. Depending on the report this icon may be available on the main screen of the report or <u>on the drill-down screen</u>.

Create Custom Form	nula Edit Formula Delete	Formula	Add to Visible	Vi	sible Order		Ľ		
Category	△ Full Caption	△ Column Caption			Column Caption	Format	Free Par	eze ne	Merg
	Batch ID	Batch ID		>	Cust #		None		
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	Document Number	Doc #		-	AD Devied 2		None		
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	Invoice Year	Inv Year		5	AR Period 4		None	•	
	Invoiced \$	Inv \$		6	Inv \$		None		
	Order Date	Ord Dt							
	Order Fiscal Period	Ord Fiscal Period							
	Order Period	Ord Period							
	Order Quarter	Ord Quarter							
	Order Week	Ord Week							
	Order Year	Ord Year							
	Total \$	Total \$							
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'AR Aging	Period 1	AR Period 1							
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The Column Chooser screen is divided into two main sections. On the left side of the screen is a list of all of the columns available to appear on the report. The three columns that make up this section of the Column Chooser begin with the table in your ERP software or the calculated table from PULSE Dashboard that the column is from. The second column is the full name of the data column that may be selected to appear on the report and the third column is the abbreviated name of the data column. By highlighting the column to be added to the report and either selecting the Add-To button at the top or double-click on the data column name the data column will be added to the report.

The "blank line" below Category/Full Caption/Column Caption header line allows the User to type in the value of the Category/Full Caption/Column Caption as a search mechanism when adding columns.

The right side of the Column Chooser screen lists the data columns that have been selected for the report. The columns may be reorganized by highlighting the field to be moved up or down in the display order by using the up/down arrow buttons above the selected fields. Highlighting the data column and selecting the "X" button will remove the data column from the report.

When the User is finished making data column selections for the report, select the "OK" button to save the layout and return to the report screen.

Sorting Reports

Information may be displayed on the report by sorting data retrieved from A to Z, Z to A, highest to lowest or lowest to highest. This is possible by either double-clicking the report column header to sort on or right-click on the report column header and select Sort Ascending or Sort Descending. The sort may also be cleared if no sort is required.

Filtering Reports

Reports may have more information than is required and the User may decide to focus on information for a single or group of customers, vendors, items, product categories, etc. This is accomplished on the report by adding a filter. There are several methods of applying filters to reports:

• Use the filter icon at the top right of the report information being defined and retrieved at the server (usually more efficient)

ilter Editor			
Filter Name:			
Field Name		Values	
Field Name	Mode	Value Start	Value End
> [Select a Field]	Include Selection 🛛 💌	> [Enter a value]	💌 [Enter a value]
+ Data Type 1 of 1		+ - Value Range 1 of 1	>
	OK Save and Share	Reset Cance	Copy Paste

- Use the filter line on a report column by typing in the information needed in the "blank" line below the report column name (contains).
- This filter may be edited by using the *Edit Filter* button at the bottom right of the report.
- The filter may be temporarily disabled by unselecting the filter at the lower left checkbox.
- The filter may be permanently removed by clicking on the red ¹²⁰ icon at the lower left of the report.

Cust #	Current	1-30 Days	31-60 Days	Over 60 Days	Inv \$
901	(\$9,155.42)	\$0.00	\$0.00	\$32,462.50	\$23,307.08
902	(\$530.00)	\$0.00	\$0.00	\$38,318.58	\$37,788.58
903	(\$6,581.70)	\$0.00	\$0.00	\$64,731.80	\$58,150.10
904	\$0.00	\$0.00	\$0.00	\$19,963.52	\$19,963.52
905	\$0.00	\$0.00	\$0.00	\$110,564.84	\$110,564.84
906	\$0.00	\$0.00	\$0.00	\$2,251.30	\$2,251.30
907	\$0.00	\$0.00	\$0.00	\$1,660.30	\$1,660.30
908	\$0.00	\$0.00	\$0.00	\$5,254.00	\$5,254.00

• Right-click on the report column and select Filter Editor to create a more complex filter than

Cu i i i i i i i i i i i i i i i i i i i	1-30 Days	31-60 Days	Over 60 Days	Inv \$
2↓ Sort Ascending	10000,0	01 00 00,0	0.0.0004,5	
Z↓ Sort Descending				
Clear Sorting	\$0.00	\$0.00	\$677.04	\$677.0
	\$0.00	\$0.00	\$32,462.50	\$23,307.0
😑 Group By This Column	\$0.00	\$0.00	\$38,318.58	\$37,788.5
Hide Group By Box	\$0.00	\$0.00	\$64,731.80	\$58,150.1
	\$0.00	\$0.00	\$19,963.52	\$19,963.5
Remove This Column	\$0.00	\$0.00	\$110,564.84	\$110,564.8
Column Chooser	\$0.00	\$0.00	\$2,251.30	\$2,251.3
Best Fit	\$0.00	\$0.00	\$1,660.30	\$1,660.3
Best Fit (all columns)	\$0.00	\$0.00	\$5,254.00	\$5,254.0
🕈 Filter Editor				
Show Find Panel	t0.00	#0.00	#27E 002 00	4250 616 7

created by typing in the data in the "blank line".

 This filter allows the User to add additional columns to filter on or change the original column, then change the operator (and, or, <, >, between, etc.) and enter the value(s) to filter on.

🐺 Filter Editor	×
And O	
[Cast #] pegins with center a value> @	
OK Cancel Apply	

Save and Share Reports

The User may create a report that would be helpful to other Users in the company and would like to share this report with them. This is possible using the Save and Share function. Most anything may be shared in PULSE Dashboard such as reports, tabs, filters, etc.

The concept of Save and Share is similar to a library or used bookstore in that you have something that was written and now would like to allow others have a copy of it by putting a copy of it into the "library/bookstore". Once the material is in the "library/bookstore" other users may "checkout/buy" a copy of this material to use on their PULSE Dashboard screens.

When adding your work to the "library/bookstore" you may also define who may "checkout/buy" the work. The work does not automatically appear on their screen when you Save and Share it but you may notify them that it is available to them and they may add it to their Dashboard. When adding the work to their PULSE Dashboard screen, just like a book, it is their personal copy and may be changed or modified as they see fit without changing the work for anyone else.

Save and Share may be found as an option on many screens in PULSE Dashboard or you may access it by doing a right-click on a report or tab header but the concept stays constant. It is a way to share your work with others easily.

File Executive	Sales and Ma	rketing Inventory	Add-Ons	Settings a	Administr	ation Help									
7/30/2015 💽	C Refresh	Current Module Aut	o-refresh	🗐 🧐 Rel	resh All	Modules Auto-	refresh 🔲	🗷 Export t	o Exce	1					
Executive Fi	nancial	Customer Servic	e Sale	s and Marl	ceting	Inventory	Purchasi	ing Produ	ction	Ma	teria	l Requ	irements	Point of	Sale Analytic
Summary GL Co	ntrol A/P b	y Account No for Tom	A/P by a	Acct for Tom	Blair	Service Invoic	es AP Trx	ROG - Kim	Jnitec	- Jim	Alkor	Goals	New Tab	Diamond Ma	chine + 🗸
Current Balan	ces			Custom	er Ord	ders Summ	ary							n an	
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Balance Cap	otion	Total \$		Booked		\$958	\$	0 \$52,3	39		Ť	Custo	mer Orders	Summary	
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			40100								-	Children Ca			
Open Purcha	se Orders	3		AP Agi	ng					AR /		FIC CO SC	reen		
	Amount	Orders	%	Current	-	\$1	126,111	37	ж і	Curre		Clone R	eport to Nev	w Window	
Current	\$52,612	3	100 %	1-30 Day	s		\$0	0	% ·	1-30 (ď	Cut Rep	ort		Ctrl+X
Next 30 Days	\$0	0	0 %	30-60 Da	iys		\$0	0	% :	31-60	B	Conv Re	enort		Ctrl+C
Next 60 Days	\$0	0	0%	Over 60 D	Days	\$2	219,165	63	% I	Over (-		curre
Over 60 Days	\$0	0	0%		Tot	al \$3	345,276					Paste R	eports		Ctrl+V
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				-					_				d Chave Der	t	

Publishing Tabs

Different from Save and Share, Publish is a feature that may be performed at the Tab level. To Publish a Tab is to allow the User to add an entire Tab of reports (one or more reports) to another User's screen. The other User does not have to add the tab to their screen. After it has been published to them, the recipient will see the new Tab when they log into PULSE Dashboard the next time. The Publish function is setup for each User if Publisher rights are needed by your PULSE Dashboard Administrator.

Publish Tab may be found as an option on all tabs in PULSE Dashboard by doing a right-click on a tab header. It is a way to share your work with others easily.

File Ex	ecutiv	e Sales and Marketing I	nventory Add-0	Ons Sett
7/30/201	5 [🚽 🦵 Refresh Current Mo	odule Auto-refre	sh 📃 📗
Execu	tive	Financial Custome	r Service S	ales and
Summar	Exer	utive: Summary]	
Currei	đ .	Summary		Ci
E	4-	Defined Tel	Total \$	~
		Kerresh Tab		BO
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Open	G	Paste Boxes Ctrl+V	-	A
	*	Permanent Tab	%	Cu
Current	*	Refresh with Module	3 100) % 1-3
Next 30		Show Filter Panel	0 ()%, 30- ∖a, Ov
Over 60	-	Move Tab Left	0 0	0 %
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Custo	×	Delete Tab		
	8	Clone Tab	verall	\$ Avail to 9
Thru To		Save and Share Tab	\$257,746	\$
Tomorr	5	Publish Tab	\$0	¢

Tips and Frequently Asked Questions

- Move all of your frequently used reports to tabs that will be used regularly and move seldom used reports to tabs that do not need to be refreshed daily.
- Recommendation Turn OFF the auto refresh option for all tabs that are not used every day or if your refresh times are long. Right-click on the tab name and uncheck the 'Refresh with Module' check-box to make that a manually refreshed tab. This will improve overall performance when refreshing the Current Module or All Modules.
- Remember that the right mouse button is a very useful tool. By using this on Tabs, the blue report header bar, report column header and many other places, a different menu of selections becomes available to provide tools used to customize PULSE Dashboard.
- When developing new reports, create a new tab and copy the report(s) that you want to use a basis for the new report to the new tab. This way you have a test area that will not change the original report. If it is "destroyed" the original is still available.

Training Exercises

This example will create a new Tab in the Executive Module with two new reports. One of the new reports will be for Customer Orders Booked, Invoiced and Open by Item for the current year. The second report will be for Open Purchase Orders by Item.

Create a New Tab

Click on the "+" tab at the end of the row of existing tabs

Pulse Dashboard for Mac	ola									
File Executive Sales and Ma	arketing Inventory	Add-Ons	Settings Administr	ation Help						
7/30/2015 🛛 🥑 Refrest	n Current Module Au	to-refresh [🖸 🧐 Refresh All f	Modules Auto	-refresh 📃	Export to Ex	cel			
Executive Financial	Customer Servi	ce Sales	and Marketing	Inventory	Purchasin	ng Productio	n Materia	l Requireme	nts	
Summary GL Contro +	-									
Current Balances			Customer Ord	lers Summ	ary					
Ne	w Tab		I	MTD Actual	MTD Budget	YTD Actual	YTD Budget	M/E Prior Year	YTD Prior Year	Total Prior Year
Balance Caption	i ocai \$		Booked	\$958		\$52,339		\$0	\$1,754	\$12,737
			Invoiced	\$0		\$30		\$0	\$1,759	\$1,992
		40.00	Open	\$257,746						
		\$0.00								
Open Purchase Order	S		AP Aging				AR Aging			
Amount	Orders	%	Current	\$	126,111	37 %	Current		(\$16,267)	-6 %
Current \$52.612	3	100 %	1-30 Days		\$0	0%	1-30 Days		\$0	0 %
Next 30 Days \$0	. 0	0%	30-60 Days		\$0	0%	31-60 Days		\$0	0%
Next 60 Days \$0	0	0 %	Over 60 Days	\$	219,165	63 %	Over 60 Day	s	\$275,884	106 %
Over 60 Days \$0	0	0 %	Tota	al \$	345,276			Total	\$259,617	

Change the Name of the new tab with a right-click and change the name field



Create a New Customer Order Report

In the "empty" tab, right-click and select Add New Report > Executive > Customer Order Summary



Change the Report Name to 'Customer Orders By Item' and select Details for the Presentation Mode and select OK.

Customer Or	ders Summary	
Box Caption:	Customer Orders I	By Item
🗔 calitari		
in tilde	ders for each sales	person
Present	ation Mode	
i Summ	nary	Details
OK	Cancel	Save and Share 👻

By selecting the Detail Presentation Mode notice that the Column Chooser icon has been added to the report. This allows the User to change the display columns on the report. Use your mouse to 'grab' the upper left or lower right of the report box and stretch it to make the report larger. Using the mouse, "grab" the report blue header bar to move the report on the tab.

e Executive Sales and Market	ing Inventory Add-Ons Settin	ngs Administration Help			
31/2015 🔜 🥂 📿 Refresh Cur	rent Module Auto-refresh 🔲 🥊	🕞 Refresh All Modules 🛛 Auto-refresh 🔲	Export to Excel		
xecutive Financial Cu	stomer Service Sales and	Marketing Inventory Purchas	sing Production	Material Requirem	ent
ummary GL Control Orders B	y Item + ~		-		
ustomer Orders By Item					
ag a column header here to group	by that column			E	
Ord Period	Inv Period	Ord \$	Inv \$	Open?	
2002-05	2013-11	(\$1,457.63)	(\$1,457.63) N	
2008-06	2013-11	\$1,495.00	\$1,495.0	D N	
2013-04	2014-01	\$1,196.40	\$1,196.4) N	
2013-11	2013-11	\$80.00	\$80.0) N	
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2010-12	0045.00	\$0.11	\$0.1	1 N	
2014-03	2010-03				
2013-12 2014-03 2014-06	2015-03	\$563.04	\$563.0	4 N	
2013-12 2014-03 2014-06 2014-06	2015-03 2014-06 2014-09	\$563.04 \$100.00	\$563.0 \$100.0	4 N D N	

Select the Column Chooser icon to change the report display columns to include the Item Number and Item Description 1. Use the Column Search line to type in the column from the list and either double-click or highlight the column name and click the Add to Visible button at the top of the screen. This will move the selected column to the right side of the screen listing the columns to display on the report. Columns may be moved up or down in the display order or deleted using the

⊚ All G Keys G E	Nates 😑 Numeric 😑 \$ 😑 % 🔤 T	able filter:		Show Group Pannel Show Auto-filter Row ✓ Aut	ow Row Indicator to-size columns		
Create Custom Formula	Edit Formula Delete Formula	Add to Visi	ble	Visible Order			
Category 4	Full Caption	Column Caption	7	Column Caption	Format	Freeze	Merc
		item				Pane	
Item	Extra 12	Item Extra 12		1 Rem #		None 💌	
Item	Extra 13	Item Extra 13		2 Item Desc 1		None 💌	
Item	Extra 14	Item Extra 14		Crid Daviad		Nono M	
Item	Extra 15	Item Extra 15					
Item	Feature Prc Opt	Item Feature Prc Opt		4 Inv Period		None 💌	
Item	Filler 0002	Item Filler 0002		5 Ord \$		None 💌	
Item	Fix Variable Lead Time Factor	Item Fix Var Ld Tm Fac		6 Inv \$		None 💌	
Item	Forced Demand	Item Forced Demand		7 Open?		None 💽	
Item	Group Tech Code	Item Group Tech Cd					
Item	Inspection Code	Item Inspection Cd					
Item	Item Description 1	Item Desc 1					
Item	Item Description 2	Item Desc 2					
Item	Item Number	Item #	=				
Item	Item Weight	Item Weight					
Item	Item Weight UOM	Item Weight UOM					
Item	Kit Cost Rollup	Item Kit Cst Rollup					
Item	Kit Feature Flag	Item Kit Feat Fg					
Item	Kit Price Rollup	Item Kit Prc Rollup					
Item	Landed Cost Code	Item Landed Cost Cd					
Item	Landed Cost Code 10	Item Landed Cost Cd 10					
Item	Landed Cost Code 2	Item Landed Cost Cd 2					
Item	Landed Cost Code 3	Item Landed Cost Cd 3					
Item	Landed Cost Code 4	Item Landed Cost Cd 4					
Item	Landed Cost Code 5	Item Landed Cost Cd 5					
Item	Landed Cost Code 6	Item Landed Cost Cd 6					
Item	Landed Cost Code 7	Item Landed Cost Cd 7					
Item	Landed Cost Code 8	Item Landed Cost Cd 8					
Item	Landed Cost Code 9	Item Landed Cost Cd 9					
Item	Last Item Revision	Item Last Item Revision					
These	Ler Date	Item Lec Dt					
Item							

When finished select the OK button to save it and return to the report.

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Executive Financial C	Customer Service Sales and Marketin	g Inventory	Purchasing	Production	Material Red	quiremen
Summary GL Control Orders	By Item + -					
Customer Orders By Iter	m					
Orag a column header here to gro	up by that column					
Item #	Item Desc 1	Ord Period	Inv Period	Ord \$	Inv \$	Open?
CABASSY	BRAKE AND CABLE ASSEMBLY	2014-09	2014-09	\$128.00	\$128.00	N
CABASSY CABLE	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1	2014-09 2014-06	2014-09 2014-06	\$128.00 \$100.00	\$128.00 \$100.00	N N
ICABASSY ICABLE ICABLE	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1 CABLE FOR BRAKES 1	2014-09 2014-06 2014-06	2014-09 2014-06 2014-09	\$128.00 \$100.00 \$100.00	\$128.00 \$100.00 \$100.00	N N N
ICABASSY ICABLE ICABLE ICABLE	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1	2014-09 2014-06 2014-06 2014-09	2014-09 2014-06 2014-09 2014-09	\$128.00 \$100.00 \$100.00 \$5.00	\$128.00 \$100.00 \$100.00 \$5.00	N N N
OCABASSY OCABLE OCABLE OCABLE OCABLE	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1	2014-09 2014-06 2014-06 2014-09 2015-03	2014-09 2014-06 2014-09 2014-09 2015-03	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00	N N N N
ICABASSY ICABLE ICABLE ICABLE ICABLE ICABLE	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1	2014-09 2014-06 2014-06 2014-09 2015-03 2013-09	2014-09 2014-06 2014-09 2014-09 2015-03	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00 \$4.00	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00 \$0.00	N N N N Y
ICABASSY ICABLE ICABLE ICABLE ICABLE ICABLE ICABLE ICABLE	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1 CABLE FOR BRAKES 1	2014-09 2014-06 2014-06 2014-09 2015-03 2013-09 2015-05	2014-09 2014-06 2014-09 2014-09 2015-03	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00 \$4.00 \$35.00	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00 \$0.00 \$0.00	N N N N Y Y
JCABASSY JCABLE JCABLE JCABLE JCABLE JCABLE JCABLE JCABLE JIKEAS	BRAKE AND CABLE ASSEMBLY CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK	2014-09 2014-06 2014-06 2014-09 2015-03 2013-09 2015-05 2002-05	2014-09 2014-06 2014-09 2014-09 2015-03 2013-11	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00 \$4.00 \$35.00 (\$1,457.63)	\$128.00 \$100.00 \$100.00 \$5.00 \$10.00 \$0.00 \$0.00 (\$1,457.63)	N N N N Y Y

Add a Report Filter to only display orders entered in 2020 by selecting the Filter icon on the blue report header. Add the Filter Name of 2020 at the top of the screen. Using the Field Name column select the Order Date column and Value Start and End range to include the range of dates for 2020.

Pulse Dashboard for M File Executive Sales and	tacola d Marketing Toyentory Add-Ons Settings	Administration Help			
7/31/2015 Ref	resh Current Module Auto-refresh	fresh All Modules Auto-refre	ech 🔲 🞯 Export to Excel		
	L Customer Consist Color and Med		unch a sing a Desiduation Material D		
Executive Financia	Lustomer Service Sales and Mari	keting inventory Pi	urchasing Production Material Re	equirements	
Summary GL Control	Orders By Item +				
Customer Orders By	y Item ()				
Drag a column header here	to group by that column	Filter Editor			
Item #	Item Desc 1	Filter Name:	2015		
		Field Name		Values	
		Field Name	Mode	Value Start	Value End
	CABLE FOR BRAKES 1	🖉 Ord Dt	Include Selection	> 1/1/2015	12/31/2015
IKEAS	ADVENTURE BIKE, LW, BLACK	Category	△ Full Caption	Column Caption	4
IKEPS	SUSPENSION BIKE, LW, BLACK				1
OM1	COMPONENT ITEM 1	>	Order Date	Ord Dt	
OM1	COMPONENT ITEM 1		Requested Date	Request Dt	
OM2	COMPONENT ITEM 2		Batch ID	Batch ID	
RAMEXL	FRAME, XLR ALUMINUM		Offset Used Flag	Offset Lised En	
			Unit Cost \$	Unit Cost \$	
			Price Code Original Price	Prc Cd Orin Price	
			Promise Date	Promise Dt	
			Serial() of Code	Ser Lot Cd	
			Transaction Posted Flag	Try Posted Fo	
			Order Period	Ord Period	
			Order Week	Ord Week	
			Invoice Week	Inv Week	
			Requested Period	Request Period	
			Requested Week	Request Week	
			Promise Period	Promise Period	
			Promise Week	Promise Week	
		+	Customer Item Number	Cust Item #	8
			Invoice Quarter	Inv Ouarter	
			Invoice Year	Inv Year	Copy Paste
			Order Year	Ord Year	
			Order Fiscal Period	Ord Fiscal Period	
			Order Quarter	Ord Quarter	
			FOB Code	FOB Cd	
		*Pulse MRP	Include Flag	MRP - Include FG	
		AR Terms	AR Terms Code	AR Terms Cd	
		Customer	Customer Number	Cust #	
and a					×

When finished select OK to save and return to the report.

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Executive Financia	al Customer Service Sales and Marke	eting Inventory	Purchasing	Production	Material Rec	luirement
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Drag a column beader bere	to group by that column					
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Item #	Item Desc 1	Ord Period	Inv Period	Ord \$	Inv \$	Open?
Item #	Item Desc 1	Ord Period	Inv Period	Ord \$	Inv \$	Open?
Item #	Item Desc 1	Ord Period	Inv Period	Ord \$	Inv \$	Open?
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Item # BCABLE BCABLE BIKEAS	Item Desc 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK	Ord Period 2015-03 2015-05 2015-03	2015-03	Ord \$ \$10.00 \$35.00 \$100.00	Inv \$ \$10.00 N \$0.00 Y \$100.00 N	Open?
Item # BCABLE BCABLE BIKEAS BIKEAS BIKEPS	Item Desc 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK SUSPENSION BIKE, LW, BLACK	Ord Period 2015-03 2015-05 2015-03 2015-06	Inv Period 2015-03 2015-03	Ord \$ \$10.00 \$35.00 \$100.00 \$1,196.00	Inv \$ \$10.00 N \$0.00 Y \$100.00 N \$0.00 Y	Open?
Item #	Item Desc 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK SUSPENSION BIKE, LW, BLACK COMPONENT ITEM 1	Ord Period 2015-03 2015-05 2015-03 2015-04	Inv Period 2015-03 2015-03	Ord \$ \$10.00 \$35.00 \$100.00 \$1,196.00 \$40.00	Inv \$ \$10.00 N \$0.00 Y \$100.00 N \$0.00 Y \$0.00 Y	Open?
Item # BCABLE BCABLE BIKEAS BIKEPS COM1 COM1	Item Desc 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK SUSPENSION BIKE, LW, BLACK COMPONENT ITEM 1	Ord Period 2015-03 2015-05 2015-03 2015-06 2015-04 2015-05	Inv Period 2015-03 2015-03	Ord \$ \$10.00 \$35.00 \$100.00 \$1,196.00 \$40.00 \$1,000.00 \$40	Inv \$ \$10.00 N \$0.00 Y \$100.00 N \$0.00 Y \$0.00 Y \$0.00 Y \$0.00 Y \$0.00 Y	Open?
Item # BCABLE BCABLE BIKEAS BIKEPS COM1 COM1 COM2	Item Desc 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK SUSPENSION BIKE, LW, BLACK COMPONENT ITEM 1 COMPONENT ITEM 1 COMPONENT ITEM 2	Cord Period 2015-03 2015-05 2015-03 2015-06 2015-04 2015-05	Inv Period 2015-03 2015-03	Ord \$ \$10.00 \$35.00 \$10.00 \$1,196.00 \$1,00.00 \$1,000.00 \$1,000.00 \$5,000 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000 \$5,000.00 \$5,000 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000.00 \$5,000 \$5	Inv \$ \$10.00 N \$0.00 Y \$100.00 N \$0.00 Y \$0.00	Open?
Item # BCABLE BCABLE BIKEPS COM1 COM1 COM2 FRAMEXL	Item Desc 1 CABLE FOR BRAKES 1 CABLE FOR BRAKES 1 ADVENTURE BIKE, LW, BLACK SUSPENSION BIKE, LW, BLACK COMPONENT ITEM 1 COMPONENT ITEM 1 COMPONENT ITEM 2 FRAME, XLR ALUMINUM	Ord Period 2015-03 2015-05 2015-03 2015-06 2015-04 2015-05 2015-07	Inv Period 2015-03 2015-03	Ord \$ \$10.00 \$35.00 \$100.00 \$1,196.00 \$40.00 \$1,000.00 \$1,000.00 \$5,000.00 \$5,000.00 \$797.70	Inv \$ \$10.00 N \$0.00 Y \$100.00 N \$0.00 Y \$0.00	Open?

If the report should be sorted by Order Period, right-click the Order Period report header and select the Sort method needed.

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Customer Orders E	By Item (2015)				88	@]4 •]7	Ī
Drag a column header here	e to group by that column						ŀ
Item #	Item Desc 1	Or	Sort Ascending	Ord \$	Inv \$	Open?	1
			Z Sort Descending				4
		2	Clear Sorting		\$0.00	Y	1
BCABLE	CABLE FOR BRAKES 1	2		\$10.00	\$10.00	N	
BCABLE	CABLE FOR BRAKES 1	2	😑 Group By This Column	\$35.00	\$0.00	Y	
BIKEAS	ADVENTURE BIKE, LW, BLACK	2	🟪 Hide Group By Box	\$100.00	\$100.00	N	
BIKEPS	SUSPENSION BIKE, LW, BLACK	2		\$1,196.00	\$0.00	Y	
COM1	COMPONENT ITEM 1	2	Remove This Column	\$40.00	\$0.00	Y	
COM1	COMPONENT ITEM 1	2	Column Chooser	\$1,000.00	\$0.00	Y	1
COM2	COMPONENT ITEM 2	2	🚍 Best Fit	\$5,000.00	\$0.00	Y	1
FRAMEXL	FRAME, XLR ALUMINUM	2	Best Fit (all columns)	\$797.70	\$0.00	Y	
			🔿 rikas ratus	\$52,338.70	\$110.00		
			γ Hiter Editor				
			Show Find Panel				
			Hide Auto Filter Row				
			Enable Cell Selection				

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