

# PULSE

## Sales, in focus.

An Excel reporting project built  
from 240 fictional orders.

240

SAMPLE ORDERS

|   | A | B                                                 | C | D | E | F | G            | H | I | J | K | L      | M | N | O | P | Q            | R | S | T | U |
|---|---|---------------------------------------------------|---|---|---|---|--------------|---|---|---|---|--------|---|---|---|---|--------------|---|---|---|---|
| 1 |   |                                                   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |
| 2 |   | Sales performance                                 |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |
| 3 |   | Fictional sales data. January–December 2026. USD. |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |
| 4 |   |                                                   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |
| 5 |   |                                                   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |
| 6 |   | NET SALES                                         |   |   |   |   | GROSS PROFIT |   |   |   |   | ORDERS |   |   |   |   | GROSS MARGIN |   |   |   |   |
| 7 |   | \$147,590                                         |   |   |   |   | \$62,328     |   |   |   |   | 240    |   |   |   |   | 42.2%        |   |   |   |   |
| 8 |   |                                                   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |
| 9 |   |                                                   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |

|   | A                                                 | B | C | D | E | F | G            | H | I | J | K | L      | M | N | O | P | Q            | R | S | T | U |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
|---|---------------------------------------------------|---|---|---|---|---|--------------|---|---|---|---|--------|---|---|---|---|--------------|---|---|---|---|--|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| 1 |                                                   |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 2 | Sales performance                                 |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 3 | Fictional sales data. January–December 2026. USD. |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 4 |                                                   |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 5 |                                                   |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 6 | NET SALES                                         |   |   |   |   |   | GROSS PROFIT |   |   |   |   | ORDERS |   |   |   |   | GROSS MARGIN |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 7 | \$147,590                                         |   |   |   |   |   | \$62,328     |   |   |   |   | 240    |   |   |   |   | 42.2%        |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 8 |                                                   |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| 9 |                                                   |   |   |   |   |   |              |   |   |   |   |        |   |   |   |   |              |   |   |   |   |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

Four KPIs. Two charts. One reporting view.

# Change an input. Explore the result.

1

## Prepare

Consistent orders, regions, products, prices and discounts.

2

## Calculate

Native Excel formulas, KPI summaries and charts.

3

## Explore

A separate browser scenario with filters and CSV export.

[Explore the working demonstration](#)

# Ledger

Know what each project earns.

Project fees, delivery costs, profit margins and collections in a connected Excel workbook.

Synthetic project and invoice records

12

projects

24

invoices

|    |                                                                    |   |                |   |            |   |             |   |
|----|--------------------------------------------------------------------|---|----------------|---|------------|---|-------------|---|
|    | A                                                                  | B | C              | D | E          | F | G           | H |
| 1  |                                                                    |   |                |   |            |   |             |   |
| 2  | Project profitability & collections                                |   |                |   |            |   |             |   |
| 3  |                                                                    |   |                |   |            |   |             |   |
| 4  | Fictional studio project portfolio. EUR excluding tax. As-of date: |   |                |   |            |   | 30-Sep-2026 |   |
| 5  |                                                                    |   |                |   |            |   |             |   |
| 6  | Metric                                                             |   | EUR / count    |   |            |   |             |   |
| 7  | Contracted fees                                                    |   | 30,700.00      |   |            |   |             |   |
| 8  | Estimated cost                                                     |   | 17,004.00      |   |            |   |             |   |
| 9  | Estimated profit                                                   |   | 13,696.00      |   |            |   |             |   |
| 10 | Invoices issued                                                    |   | 30,700.00      |   |            |   |             |   |
| 11 | Cash collected                                                     |   | 14,925.00      |   |            |   |             |   |
| 12 | Outstanding                                                        |   | 15,775.00      |   |            |   |             |   |
| 13 | Overdue invoices                                                   |   | 6              |   |            |   |             |   |
| 14 |                                                                    |   |                |   |            |   |             |   |
| 15 |                                                                    |   |                |   |            |   |             |   |
| 16 | Project                                                            |   | Fee EUR        |   | Profit EUR |   | Margin      |   |
| 17 | Alder website                                                      |   | 2,400.00       |   | 1,542.00   |   | 64.3%       |   |
| 18 | Juniper deck                                                       |   | 1,800.00       |   | 599.00     |   | 33.3%       |   |
| 19 | Cedar reporting                                                    |   | 3,200.00       |   | 1,656.00   |   | 51.7%       |   |
| 20 | Birch workflow                                                     |   | 2,800.00       |   | 1,078.00   |   | 38.5%       |   |
| 21 | Willow launch                                                      |   | 2,200.00       |   | 135.00     |   | 6.1%        |   |
| 22 | Maple dashboard                                                    |   | 3,600.00       |   | 2,632.00   |   | 73.1%       |   |
| 23 | Hazel proposal                                                     |   | 1,600.00       |   | 454.00     |   | 28.4%       |   |
| 24 | Elm scheduling                                                     |   | 2,900.00       |   | 1,411.00   |   | 48.7%       |   |
| 25 | Ash website                                                        |   | 2,600.00       |   | 768.00     |   | 29.5%       |   |
| 26 | Oak reporting                                                      |   | 3,100.00       |   | 1,090.00   |   | 35.2%       |   |
| 27 | Pine workflow                                                      |   | 2,500.00       |   | 1,587.00   |   | 63.5%       |   |
| 28 | Rowan slides                                                       |   | 2,000.00       |   | 744.00     |   | 37.2%       |   |
| 29 |                                                                    |   |                |   |            |   |             |   |
| 30 |                                                                    |   |                |   |            |   |             |   |
| 31 | Reconciliation                                                     |   | Difference EUR |   |            |   |             |   |
| 32 | Fees less cost less profit                                         |   | 0.00           |   |            |   |             |   |
| 33 | Issued less collected less outstanding                             |   | 0.00           |   |            |   |             |   |
| 34 | Invoice input issues                                               |   | 0              |   |            |   |             |   |

# Economics and collections, together.

|    | A                                                                                            | B               | C        | D     | E           | F        | G          | H        | I      | J        | K         | L        | M           |
|----|----------------------------------------------------------------------------------------------|-----------------|----------|-------|-------------|----------|------------|----------|--------|----------|-----------|----------|-------------|
| 1  |                                                                                              |                 |          |       |             |          |            |          |        |          |           |          |             |
| 2  | Projects                                                                                     |                 |          |       |             |          |            |          |        |          |           |          |             |
| 3  |                                                                                              |                 |          |       |             |          |            |          |        |          |           |          |             |
| 4  | Source: fictional project records created for this demonstration. Yellow cells are editable. |                 |          |       |             |          |            |          |        |          |           |          |             |
| 5  |                                                                                              |                 |          |       |             |          |            |          |        |          |           |          |             |
| 6  | Project ID                                                                                   | Project         | Fee EUR  | Hours | Cost / hour | Expenses | Total cost | Profit   | Margin | Invoiced | Collected | Unbilled | Balance due |
| 7  | PR-001                                                                                       | Alder website   | 2,400.00 | 24    | 32.00       | 90.00    | 858.00     | 1,542.00 | 64.3%  | 2,400.00 | 2,400.00  | -        | -           |
| 8  | PR-002                                                                                       | Juniper deck    | 1,800.00 | 33    | 32.00       | 145.00   | 1,201.00   | 599.00   | 33.3%  | 1,800.00 | 1,800.00  | -        | -           |
| 9  | PR-003                                                                                       | Cedar reporting | 3,200.00 | 42    | 32.00       | 200.00   | 1,544.00   | 1,656.00 | 51.7%  | 3,200.00 | 3,200.00  | -        | -           |
| 10 | PR-004                                                                                       | Birch workflow  | 2,800.00 | 51    | 32.00       | 90.00    | 1,722.00   | 1,078.00 | 38.5%  | 2,800.00 | 2,800.00  | -        | -           |
| 11 | PR-005                                                                                       | Willow launch   | 2,200.00 | 60    | 32.00       | 145.00   | 2,065.00   | 135.00   | 6.1%   | 2,200.00 | 2,200.00  | -        | -           |
| 12 | PR-006                                                                                       | Maple dashboard | 3,600.00 | 24    | 32.00       | 200.00   | 968.00     | 2,632.00 | 73.1%  | 3,600.00 | -         | -        | 3,600.00    |
| 13 | PR-007                                                                                       | Hazel proposal  | 1,600.00 | 33    | 32.00       | 90.00    | 1,146.00   | 454.00   | 28.4%  | 1,600.00 | 400.00    | -        | 1,200.00    |
| 14 | PR-008                                                                                       | Elm scheduling  | 2,900.00 | 42    | 32.00       | 145.00   | 1,489.00   | 1,411.00 | 48.7%  | 2,900.00 | 725.00    | -        | 2,175.00    |
| 15 | PR-009                                                                                       | Ash website     | 2,600.00 | 51    | 32.00       | 200.00   | 1,832.00   | 768.00   | 29.5%  | 2,600.00 | -         | -        | 2,600.00    |
| 16 | PR-010                                                                                       | Oak reporting   | 3,100.00 | 60    | 32.00       | 90.00    | 2,010.00   | 1,090.00 | 35.2%  | 3,100.00 | 775.00    | -        | 2,325.00    |
| 17 | PR-011                                                                                       | Pine workflow   | 2,500.00 | 24    | 32.00       | 145.00   | 913.00     | 1,587.00 | 63.5%  | 2,500.00 | 625.00    | -        | 1,875.00    |
| 18 | PR-012                                                                                       | Rowan slides    | 2,000.00 | 33    | 32.00       | 200.00   | 1,256.00   | 744.00   | 37.2%  | 2,000.00 | -         | -        | 2,000.00    |
| 19 |                                                                                              |                 |          |       |             |          |            |          |        |          |           |          |             |

|    | A          | B           | C                                                            | D           | E           | F        | G           | H            | I          | J             |
|----|------------|-------------|--------------------------------------------------------------|-------------|-------------|----------|-------------|--------------|------------|---------------|
| 1  |            |             |                                                              |             |             |          |             |              |            |               |
| 2  | Invoices   |             |                                                              |             |             |          |             |              |            |               |
| 3  |            |             |                                                              |             |             |          |             |              |            |               |
| 4  | As-of date | 30-Sep-2026 | Amounts exclude tax. Paid input cannot exceed invoice total. |             |             |          |             |              |            |               |
| 5  |            |             |                                                              |             |             |          |             |              |            |               |
| 6  | Invoice ID | Project ID  | Issued                                                       | Due         | Amount EUR  | Paid EUR | Outstanding | Days overdue | Status     | Project match |
| 7  | INV-001    | PR-001      | ▼                                                            | 01-Jul-2026 | 31-Jul-2026 | 1,200.00 | 1,200.00    | -            | 0 Paid     | Matched       |
| 8  | INV-002    | PR-001      | ▼                                                            | 04-Jul-2026 | 03-Aug-2026 | 1,200.00 | 1,200.00    | -            | 0 Paid     | Matched       |
| 9  | INV-003    | PR-002      | ▼                                                            | 07-Jul-2026 | 06-Aug-2026 | 900.00   | 900.00      | -            | 0 Paid     | Matched       |
| 10 | INV-004    | PR-002      | ▼                                                            | 10-Jul-2026 | 09-Aug-2026 | 900.00   | 900.00      | -            | 0 Paid     | Matched       |
| 11 | INV-005    | PR-003      | ▼                                                            | 13-Jul-2026 | 12-Aug-2026 | 1,600.00 | 1,600.00    | -            | 0 Paid     | Matched       |
| 12 | INV-006    | PR-003      | ▼                                                            | 16-Jul-2026 | 15-Aug-2026 | 1,600.00 | 1,600.00    | -            | 0 Paid     | Matched       |
| 13 | INV-007    | PR-004      | ▼                                                            | 19-Jul-2026 | 18-Aug-2026 | 1,400.00 | 1,400.00    | -            | 0 Paid     | Matched       |
| 14 | INV-008    | PR-004      | ▼                                                            | 22-Jul-2026 | 21-Aug-2026 | 1,400.00 | 1,400.00    | -            | 0 Paid     | Matched       |
| 15 | INV-009    | PR-005      | ▼                                                            | 01-Aug-2026 | 31-Aug-2026 | 1,100.00 | 1,100.00    | -            | 0 Paid     | Matched       |
| 16 | INV-010    | PR-005      | ▼                                                            | 04-Aug-2026 | 03-Sep-2026 | 1,100.00 | 1,100.00    | -            | 0 Paid     | Matched       |
| 17 | INV-011    | PR-006      | ▼                                                            | 07-Aug-2026 | 06-Sep-2026 | 1,800.00 | -           | 1,800.00     | 24 Overdue | Matched       |
| 18 | INV-012    | PR-006      | ▼                                                            | 10-Aug-2026 | 09-Sep-2026 | 1,800.00 | -           | 1,800.00     | 21 Overdue | Matched       |
| 19 | INV-013    | PR-007      | ▼                                                            | 13-Aug-2026 | 12-Sep-2026 | 800.00   | 400.00      | 400.00       | 18 Overdue | Matched       |
| 20 | INV-014    | PR-007      | ▼                                                            | 16-Aug-2026 | 15-Sep-2026 | 800.00   | -           | 800.00       | 15 Overdue | Matched       |

01 **Project assumptions**  
Fees, hours, costs and margins.

02 **Invoice tracking**  
Issued, collected and outstanding.

03 **Interactive scenario**  
Change fees, costs or payments.

Explore the working demonstration