

Pulse Report

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Overview

The **Pulse Report** is designed to highlight **trends and progress**, rather than absolute numbers. It helps answer key questions like:

- How am I performing against my goals and forecast?
- How are my sales agents performing?

This report provides **leading indicators** of business health, giving owners a clear snapshot of performance.

To account for **seasonality**, we use both **Trailing 12 Months (T12)** and **Year-to-Date (YTD)** metrics. Some figures update in **real-time**, while others refresh overnight—so minor discrepancies should not distract from the bigger picture. The goal is to provide an overall sense of your business's **vital signs**.

Video Tutorial

An in-depth look at the Pulse Report is found in at section 25:00 - 34:28 in the below link to the Know Your Numbers Webinar.

[Watch it Now](#)

Contact Production

This is a **real-time** tally of total **contacts added** at the organizational level (**brand-level data updates overnight**).

- This includes **all new contacts**—not just **prospects or leads**. It accounts for contacts created manually, imported in bulk, or added via API.
 - **Month-to-Date (MTD)** and **Year-to-Date (YTD)** reflect standard time frames.
 - **Trailing 12 Months (T12)** represents the total leads created over the past **365 days**.
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Booking Production

This metric represents the **percentage of contacts who have booked an appointment**, regardless of service type or appointment date. **Cancelled appointments are excluded**.

Customer Production

This reflects the number of **new customers** within the report's timeframe.

- A customer is considered **new** when their **first invoice** is created.
- **Returning customers** with a new project are **not included**—this is based on the **Customer Since X-Date** metric.

Accepted Proposals

The definition of a **sale** varies by business model—it could be when:

- A contract is signed.
- A deposit is paid.
- A job is fully paid.

If your business defines a sale based on a **signed contract**, this metric reflects **new business value**, whether invoiced or not. The total increases when a **customer signs a proposal** or when an **internal acceptance** is recorded.

Revenue

This section includes:

- **Invoices created** during the selected time period.
- **Open balances** on any existing invoices.

Additionally, the percentages and dollar figures in the **bottom right corner** compare performance against the **previous month, year, and trailing 12 months**.

Contacts by Category

This section is where your contacts are grouped into "Buckets" - i.e. Prospects vs. Customers vs. Partners. As each organization determines its own Contact categories, this will be different for each organization.

If your organization permits contacts to be "owned" by users, that information will be tracked as well.

Acquisition and Retention

This section displays the **total number of contacts created** in the **trailing 12 months (T12)** and how many of them were **invoiced**.

- **Acquisition (New Customer Conversion)**: How many of these contacts became customers? The **invoiced data** reflects the number and percentage of contacts who received an invoice within the trailing 12 months.
 - **Retention (Returning Customer Business)**: This measures **repeat business** by showing how many contacts had invoices in the **previous** trailing 12 months and what percentage of them had invoices again in the **current** trailing 12 months.
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Reworks by Service

This section tracks what percentage of appointments required Rework appointments.

FAQs

Where's the best place to look for our month-to-date sales?

It depends on your definition of "sales." Thinking in terms of accepted proposals, the Accepted Proposals widget on Pulse is a good place to look. If you're in cash accounting mode, then the Payment Reconciliation Report is set to month to date.

What is the difference between Pulse and Pipeline Contact numbers based on sales?

Their numbers are calculated a little differently, so that's where the discrepancy is happening. Depending on which data you need, one might be better for you than the other.

- **Pulse:** the Customer Production number comes from any contacts invoiced for the first time (that's how we default classify "Customers")
 - **Pipeline:** this is proposal based, so it correlates to the won proposals you can see in the Proposals Summary section.
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