

# Game-changing insights for your clients



INSIGHT

# What is Pulse?

Pulse helps your clients find the **best solutions** for their business and avoid potential pitfalls, keeping them ahead of the curve at all times.

Get **x-ray vision** for your clients and stand out from the competition with Pulse by your side!

With Pulse, your clients can see things clearly and understand what your expert number-crunching **really means** for their business.

After a simple **30 second journey**, you and your clients can access our AI-driven dashboard - **on any device, anywhere, any time.**



## OVERVIEW

# Benefits of using Pulse



Pulse integrates with all leading accounting platforms in seconds for a **super-fast journey**.



We spot trends, flag issues, and **create management accounts** so that you don't have to.



You can drive engagement with our first-class tool and **boost client retention** like never before.



Saves you **time and money** by automating time-consuming tasks.

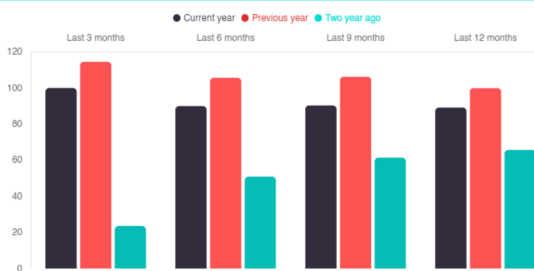


Empower your clients to make **smart financial decisions** with your expert advice.

## METRICS

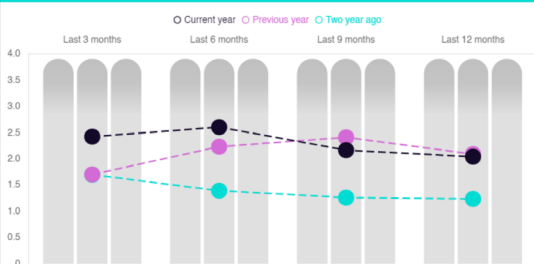
# Data visualisation like never before

### Gross Margin



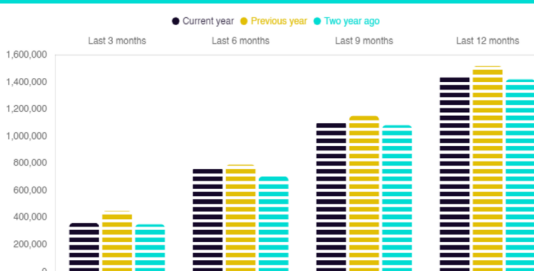
Over the last 12 months, the Gross Margin is consistently below the previous year. This will impact the P&L negatively. We suggest early conversations with customers to address this

### Debtors/Creditors Ratio



The Ratio has returned to the long term average over the last 6 months

### Turnover Trend



Over the last 12 months, the business turnover is consistently below the previous year

### Profit & Loss



While the business profitability returned to the long term average in the last quarter, the recent quarter has seen a dip

### Gross Margin

Real-time analysis of gross margin data means that a persistent decline can be spotted, its causes identified and a correction strategy implemented.

### Debtors / Creditors Ratio

Check outstanding payments and receivables to enhance cash flow and prepare for short-term obstacles. Effectively handling debtor/creditor ratios strengthens business resilience.

### Turnover Trend

Truly understanding the trends within your turnover data will help spotlight growth opportunities for your clients.

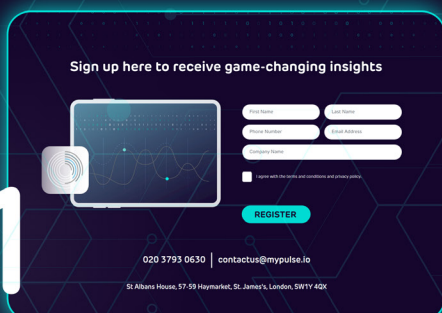
### Profit and Loss

An accurate and timely understanding of P&L is a key tool to managing a business, but it can hugely time consuming. Pulse solves that issue.

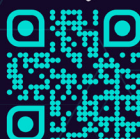
PROCESS

# How it works

1

A registration form titled "Sign up here to receive game-changing insights". It includes a "REGISTER" button, contact information (020 3793 0630, contactus@mypulse.io), and a physical address (St Albans House, 57-59 Haymarket, St. James's, London, SW1Y 4QX). There are also input fields for Name, Email, and Password, and a checkbox for terms and conditions.

**Sign up** to join the Pulse revolution using our super easy registration form



2



**Get a call** from our friendly team to securely complete your journey

3



**Get access** to your AI-powered Pulse dashboard!

4



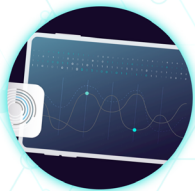
**Use our financial trend analysis** to start making stronger, better and more successful decisions for your clients

INTERFACE

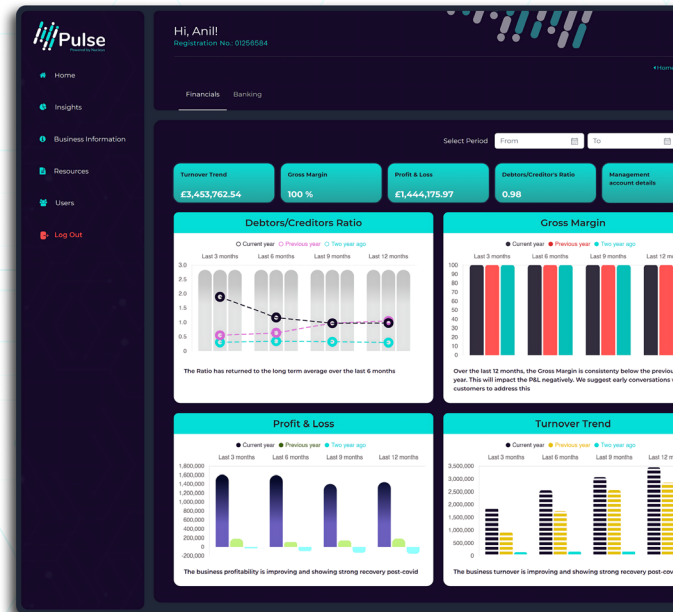
# Your very own AI-driven Pulse dashboard



Access trend analysis and management accounts on our dynamic dashboard, available on any device.

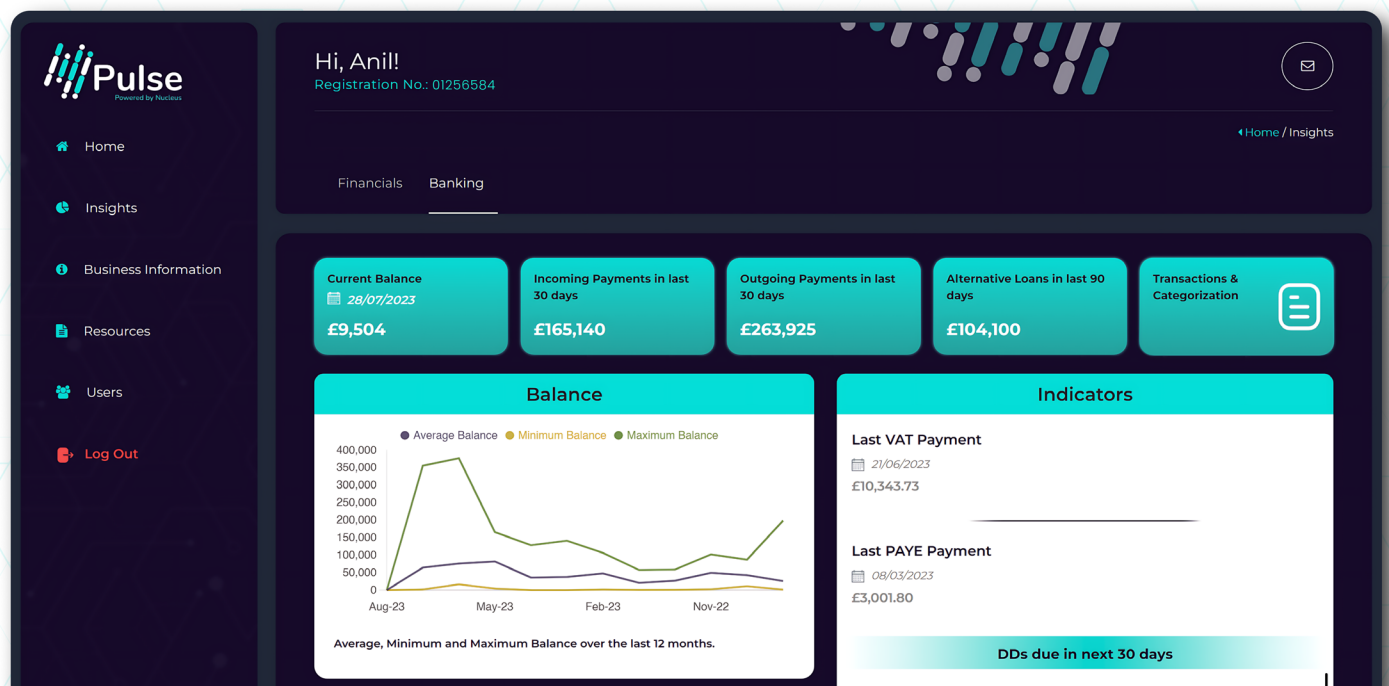


Advanced data analysis made easy thanks to our intuitive dashboard **built just for you.**



## Introducing Open Banking graphs

By fusing together Open Banking and machine learning, **Pulse now provides visibility** into potential upcoming payments, enabling you to identify and address cash flow issues before they escalate. Embrace the future with our **forward-thinking solutions**, designed to empower you in your financial journey.



## PROTECTION

# Safe and secure, as it should be

Pulse has been designed with security at its heart as it works by utilising **Open Banking and Open Accounting technology**. Both have been built on the secure systems we're already familiar with, which are used by traditional banks, with security and counter-fraud controls that you can trust.

You choose when, with whom and for how long you provide access to your clients' data, so **you're in charge of who can access it**, and Pulse is no exception!

### ***Remember!***

With Open Banking and Open Accounting, you or your client will **never be asked to share security details**. It's third-party, read-only access, so you'll still remain totally **GDPR compliant!**



## TRANSFORMATION

# We're moving fast, don't get left behind

We're serious when we say we're starting a revolution... At Pulse HQ, we're empowering businesses across the UK with their own financial data and we've got exciting updates **coming soon...**

### Cash Flow Analysis

- With Open Banking access from your clients, you'll get real time alerts on any irregular transactions - we'll let you know if they get too low
- Get the lowdown on your new borrowings and repayments from us

### Business Loan Offers

- Receive daily updates on how much your clients can borrow
- Get pre-approved loans with details on amount, term and rate

### Dynamic Forecasting Capability

- Generate forecasts instantly with a single tap
- Sleek UI with clever tips for forecasts based on historical trends, and the power to override them

### Customer and Supplier Analysis

- Check your clients' credit risk in a flash
- Keep an eye on financial movements effortlessly



KNOWLEDGE

# Extras to enhance your experience

With the Pulse dashboard, you'll unlock a rich variety of resources to help you excel in the fast-changing world of accounting. You'll enjoy:



**Management accounts** that help you forecast and prepare for your financial obligations



Join us every month for **engaging webinars** designed to boost your financial wisdom

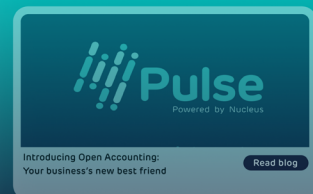


**Fresh blogs** that bring you the latest news and insights from the world of finance and technology



Alternative Lenders' No More - How Fintech Players Are Challenging the Dominance of Incumbent Banks

[Read blog](#)



Introducing Open Accounting: Your business's new best friend

[Read blog](#)



Engaging videos featuring our CEO **Chirag Shah** and our brilliant team, showing you how to make the most of the dashboard's features



Harness the full potential of Pulse with **ongoing support** from our skilled partnerships team



In addition, we'll also send you **monthly newsletters** packed with bite-sized information that you can easily digest

COLLABORATE

# Explore our partners

We're all about teamwork at Pulse, especially when it's for a good cause like **helping SMEs**. That's why we've joined forces with a range of businesses and services that have the **same goal as us**. Explore our current list of partners and keep an eye out for more alliances in the near future.



AJ Chambers provides specialist recruitment, mergers & acquisitions and expert market intelligence across the public and legal practice sectors.



The 6FB Club is a community of bookkeepers and accountants that provides a shared space for members to collaborate and brainstorm for business growth.



Perfect Balance provides comprehensive bookkeeping and accounting services tailored for SMEs across various industries, including accounts, tax and payroll.



Clarendon Square Advisory provides specialist services to UK SMEs, including mergers & acquisitions, business development, executive recruitment, and non-executive support.

# INCORPORATE Integrations



Thursday 8 September

20:22

Pulse seamlessly connects  
with all of the following  
banking and accounting  
providers.



 Starling  
Bank

Sage

 NatWest

xero

 Microsoft  
Dynamics® 365

 wave

 pingit

 Capital One®

And plenty more!



Game-changing insights  
for your clients

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