



DATA SHEET

360° SALES VIEW (formerly Customer Launchpad)









MAKE IT EASY FOR YOUR SALES TEAM TO SELL WITH ALL INFORMATION IN ONE PLACE

Sales, item, and customer analysis all in one place, instead of jumping from screen to screen.

VIEW COMPLETE SALES ORDER HISTORY

- Complete customer view with easy drill-down in the details.

Customer Launch Pad ★

Customer ID: ABARTENDE - USA  Order Nbr.:  From Date: 1/1/2018 
☐ Show All Customers Shipment Nbr.:  To Date: 12/6/2018 
 Customer Class: KEY - Key Customers Inventory ID:  
 Contact ID: 

Customer Information

Last Order Date: 10/30/2018 Last Pmt Date: 12/5/2018 YTD Sales: 1,728,229.18
 Last Inv Date: 10/30/2018 Balance: 176,823.56 Last YR Sales: 2,048,578.45

VIEW SOURCE	DUPLICATE ORDER	Customer	Order Nbr.	Inventory ID	Description	Item Class ID	Order Date	Unit Price	Quantity	Unit	Disc%	Perc
USA BARTENDING SCHOOL ORDE												
Ord: SO004136 - Completed		ABARTEN...	SO004135	AACOMPUT01	Acer Laptop Computer	ELECC...	6/6/2018	500.00	1.00	EA	0.0000	
Ord: SO004139 - Completed		ABARTEN...	SO004416	AALGO0500	Lego 500 piece set	CONSU...	8/21/2018	110.00	1.00	EA	0.0000	
Ord: SO004170 - Completed		ABARTEN...	SO004417	AALGO0500	Lego 500 piece set	CONSU...	8/21/2018	110.00	2.00	EA	0.0000	
Ord: SO004173 - Completed		ABARTEN...	SO004136	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	1/15/2018	4.39	3,200.00	EA	0.0000	
Ord: SO004204 - Completed		ABARTEN...	SO004170	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	2/15/2018	4.39	3,900.00	EA	0.0000	
Ord: SO004207 - Completed		ABARTEN...	SO004204	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	3/15/2018	4.39	3,400.00	EA	0.0000	
Ord: SO004238 - Completed		ABARTEN...	SO004238	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	4/15/2018	4.39	4,400.00	EA	0.0000	
Ord: SO004241 - Completed		ABARTEN...	SO004271	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	5/15/2018	4.39	3,300.00	EA	0.0000	
Ord: SO004274 - Completed		ABARTEN...	SO004304	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	6/5/2018	4.39	4,600.00	EA	0.0000	
Ord: SO004304 - Completed		ABARTEN...	SO004335	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	7/15/2018	4.39	5,700.00	EA	0.0000	
Ord: SO004307 - Completed		ABARTEN...	SO004383	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	8/15/2018	4.39	3,400.00	EA	0.0000	
Ord: SO004319 - Completed		ABARTEN...	SO004437	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	9/15/2018	4.39	5,300.00	EA	0.0000	
Ord: SO004339 - Completed		ABARTEN...	SO004488	FOODCOLA12	Coca-Cola Cans 12 Co...	FOOD...	10/15/2018	4.39	5,500.00	EA	0.0000	
Ord: SO004342 - Completed		ABARTEN...	SO004135	SPECIALORD	Special or custom order	ALLOTH...	1/30/2018	8,000.00	20.00	EA	0.0000	
Ord: SO004383 - Completed												
Ord: SO004386 - Completed												

FIND ANY SALES ORDER FAST

- Find any Sales Orders by Customer, Customer Class, Order Number, Shipment Number, Item Number or Item Class.

QUICK SALES ORDER ENTRY

- Select any items from an existing customer order and easily do a "Quick SO Creation" to create another Acumatica Sales Order.
- Quickly create new sales orders from a previous customer order.

CREATE AND ANALYZE ORDERS QUICKLY

- Access the 360° Sales View directly from the Acumatica Sales Order and add items as requested by the customer.
- Easily view prices per item per customer.

KEY BENEFITS

CREATE SALES QUICKLY

- Easily find customer and inventory history
- Quickly create a duplicate sales order
- Rapidly recommend additional products your customers would be interested in

SALES ANALYSIS

- View all orders for a particular product
- Quickly recommend additional products based on history
- Easily answer all your customer questions
- View profitability statistics

ITEM ANALYSIS

- Easy inventory analysis
- View all sales orders by item or class
- See which customers purchased which products and at what profitability
- Quick profit report on items

CUSTOMER RELATIONSHIPS

- Quickly and easily answer all customer questions
- No screen jumping needed
- Do customer re-order on the fly

360° SALES VIEW
for Acumatica



DATA SHEET

360° SALES VIEW FEATURES AND CAPABILITIES (formerly Customer Launchpad)

One Central Screen

Get all your customer and Sales Order information in one place. No more screen jumping needed.

Complete Customer History

See all your customer history with easy drill-down into details.

1-Click Orders

Create orders for your customer with the Quick SO Creation.

Customer Analysis

Quickly analyze your customer's purchasing history and your profitability.

Complete Inventory Analysis

View all sales orders by inventory item or class. Simply enter an item ID and see which customers purchased the product and at what price and profitability.

Customer Launch Pad

Customer ID: Order Nbr: From Date: 1/1/2018 To Date: 12/6/2018

Customer Class: KEY - Key Customers Inventory ID: AACOMPUT01 - Acer Laptop Item Class ID:

Customer Information

Last Order Date: Last Pmt Date: YTD Sales: 0.00

Last Inv Date: Balance: 0.00 Last YR Sales: 0.00

VIEW SOURCE	DUPLICATE ORDER	Customer	Order Nbr	Inventory ID	Description	Item Class ID	Order Date	Unit Price	Quantity	*U	Disc Per
ALL CUSTOMERS ORDERS		ELEVATION	AR005524	AACOMPUT01	Acer Laptop Computer	ELECC...	1/7/2018	500.00	20.00	EA	0.00%
		JEVTCOM	AR005525	AACOMPUT01	Acer Laptop Computer	ELECC...	1/10/2018	500.00	20.00	EA	0.00%
		BRASSKEY	AR005526	AACOMPUT01	Acer Laptop Computer	ELECC...	1/21/2018	500.00	50.00	EA	0.00%
		BRASSKEY	AR005584	AACOMPUT01	Acer Laptop Computer	ELECC...	2/7/2018	500.00	40.00	EA	0.00%
		CARIBBEAN	AR005585	AACOMPUT01	Acer Laptop Computer	ELECC...	2/10/2018	408.21	50.00	EA	0.00%
		JEVTCOM	AR005586	AACOMPUT01	Acer Laptop Computer	ELECC...	2/21/2018	500.00	50.00	EA	0.00%
		WRIGHTC	AR005652	AACOMPUT01	Acer Laptop Computer	ELECC...	3/7/2018	500.00	30.00	EA	0.00%
		ELEVATION	AR005653	AACOMPUT01	Acer Laptop Computer	ELECC...	3/10/2018	500.00	30.00	EA	0.00%
		WRIGHTC	AR005654	AACOMPUT01	Acer Laptop Computer	ELECC...	3/21/2018	500.00	50.00	EA	0.00%
		WIFAN	AR005723	AACOMPUT01	Acer Laptop Computer	ELECC...	4/7/2018	500.00	30.00	EA	0.00%
		BRASSKEY	AR005724	AACOMPUT01	Acer Laptop Computer	ELECC...	4/10/2018	500.00	30.00	EA	0.00%
		BRASSKEY	AR005785	AACOMPUT01	Acer Laptop Computer	ELECC...	5/7/2018	500.00	30.00	EA	0.00%
		ARTCAGES	AR005786	AACOMPUT01	Acer Laptop Computer	ELECC...	5/10/2018	500.00	80.00	EA	0.00%
		ARTCAGES	AR005787	AACOMPUT01	Acer Laptop Computer	ELECC...	5/21/2018	500.00	30.00	EA	0.00%

Sales Rep Analysis

See which Sales Reps sold particular products and at what profitability to your company.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

STREAMLINE OPERATIONS

Manage your business more efficiently:

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

ADAPTABLE SOLUTION

Add and extend:

- Deploy in-house or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

YOUR BUSINESS ACCELERATED

Get a single version of the truth:

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per user pricing – system scales as your business grows

360[°] SALES
VIEW
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