



## DATA SHEET

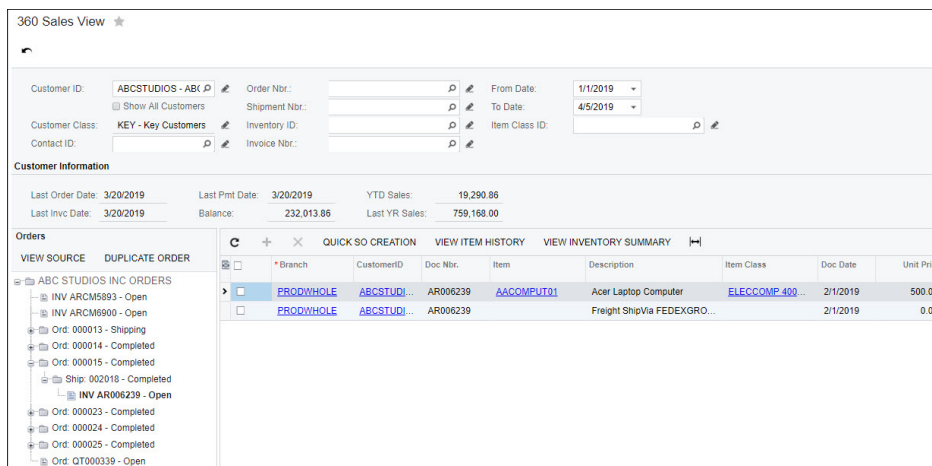
# 360° SALES VIEW

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

Sales, item, invoice, 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.



360 Sales View

Customer ID: ABCSTUDIOS - ABC Order Nbr.: From Date: 1/1/2019 To Date: 4/5/2019

Customer Class: KEY - Key Customers Inventory ID: Item Class ID:

Contact ID: Invoice Nbr.:

Customer Information

Last Order Date: 3/20/2019 Last Pmt Date: 3/20/2019 YTD Sales: 19,290.86

Last Inv Date: 3/20/2019 Balance: 232,013.85 Last YR Sales: 759,168.00

Orders

VIEW SOURCE DUPLICATE ORDER

ABC STUDIOS INC ORDERS

- INV ARCM5893 - Open
- INV ARCM6900 - Open
- Ord. 000013 - Shipping
- Ord. 000014 - Completed
- Ord. 000015 - Completed
- Ship. 002018 - Completed
- INV AR006239 - Open
- Ord. 000023 - Completed
- Ord. 000024 - Completed
- Ord. 000025 - Completed
- Ord. GT000339 - Open

Branch	CustomerID	Doc Nbr.	Item	Description	Item Class	Doc Date	Unit Price
PRODWHOLE	ABCSTUDI...	AR006239	AACOMP101	Acer Laptop Computer	ELECCOMP 400	3/1/2019	500.00
PRODWHOLE	ABCSTUDI...	AR006239		Freight ShipVia FEDEXGRO...		2/1/2019	0.00

## FIND ANY SALES ORDER FAST

- Find any Sales Orders or Invoices 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 or invoices 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<sup>°</sup> SALES  
VIEW  
for Acumatica



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

#### One Central Screen

Get all your customer and Sales Order and Invoice 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

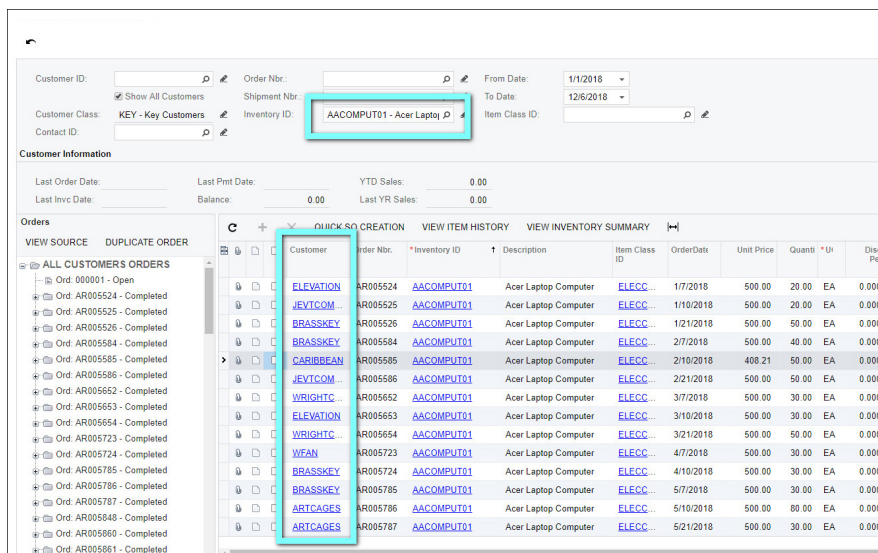
Create orders for your customer with the Quick SO Creation.

#### Customer Analysis

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

#### Complete Inventory Analysis

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



The screenshot shows the Acumatica 360° Sales View interface. At the top, there are search filters for Customer ID, Order Nbr., From Date (1/1/2018), To Date (12/6/2018), and Inventory ID (AACOMPUT01 - Acer Laptop). Below these are sections for Customer Information (Last Order Date, Last Inv Date, Last Pmt Date, Balance, YTD Sales, Last YR Sales) and a list of orders. The 'QUICK SO CREATION' tab is active, showing a list of orders with columns for Customer, Order Nbr., Inventory ID, Description, Item Class ID, Order Date, Unit Price, Quantity, and Discount. A red box highlights the 'QUICK SO CREATION' tab and the 'AACOMPUT01 - Acer Laptop' inventory ID.

Customer	Order Nbr.	Inventory ID	Description	Item Class ID	Order Date	Unit Price	Quantity	Unit	Disc. Pct.
ELEVATION	AR005524	AACOMPUT01	Acer Laptop Computer	ELECC...	1/7/2018	500.00	20.00	EA	0.000
JEVTCOM...	AR005525	AACOMPUT01	Acer Laptop Computer	ELECC...	1/10/2018	500.00	20.00	EA	0.000
BRASSKEY	AR005526	AACOMPUT01	Acer Laptop Computer	ELECC...	1/21/2018	500.00	50.00	EA	0.000
BRASSKEY	AR005584	AACOMPUT01	Acer Laptop Computer	ELECC...	2/7/2018	500.00	40.00	EA	0.000
CARRIBEAN	AR005585	AACOMPUT01	Acer Laptop Computer	ELECC...	2/10/2018	408.21	50.00	EA	0.000
JEVTCOM...	AR005586	AACOMPUT01	Acer Laptop Computer	ELECC...	2/21/2018	500.00	50.00	EA	0.000
WRIGHTC...	AR005652	AACOMPUT01	Acer Laptop Computer	ELECC...	3/7/2018	500.00	30.00	EA	0.000
ELEVATION	AR005653	AACOMPUT01	Acer Laptop Computer	ELECC...	3/10/2018	500.00	30.00	EA	0.000
WRIGHTC...	AR005654	AACOMPUT01	Acer Laptop Computer	ELECC...	3/21/2018	500.00	50.00	EA	0.000
WIFAN	AR005723	AACOMPUT01	Acer Laptop Computer	ELECC...	4/7/2018	500.00	30.00	EA	0.000
BRASSKEY	AR005724	AACOMPUT01	Acer Laptop Computer	ELECC...	4/10/2018	500.00	30.00	EA	0.000
BRASSKEY	AR005785	AACOMPUT01	Acer Laptop Computer	ELECC...	5/7/2018	500.00	30.00	EA	0.000
ARTCAGES	AR005786	AACOMPUT01	Acer Laptop Computer	ELECC...	5/10/2018	500.00	80.00	EA	0.000
ARTCAGES	AR005787	AACOMPUT01	Acer Laptop Computer	ELECC...	5/21/2018	500.00	30.00	EA	0.000

#### 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

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