THE ANSWER COMPANY

Acumatica Tips and Tricks

WORKSPACES, DASHBOARDS AND AUTOMATED REPORTS

Acumatica
The Cloud ERP

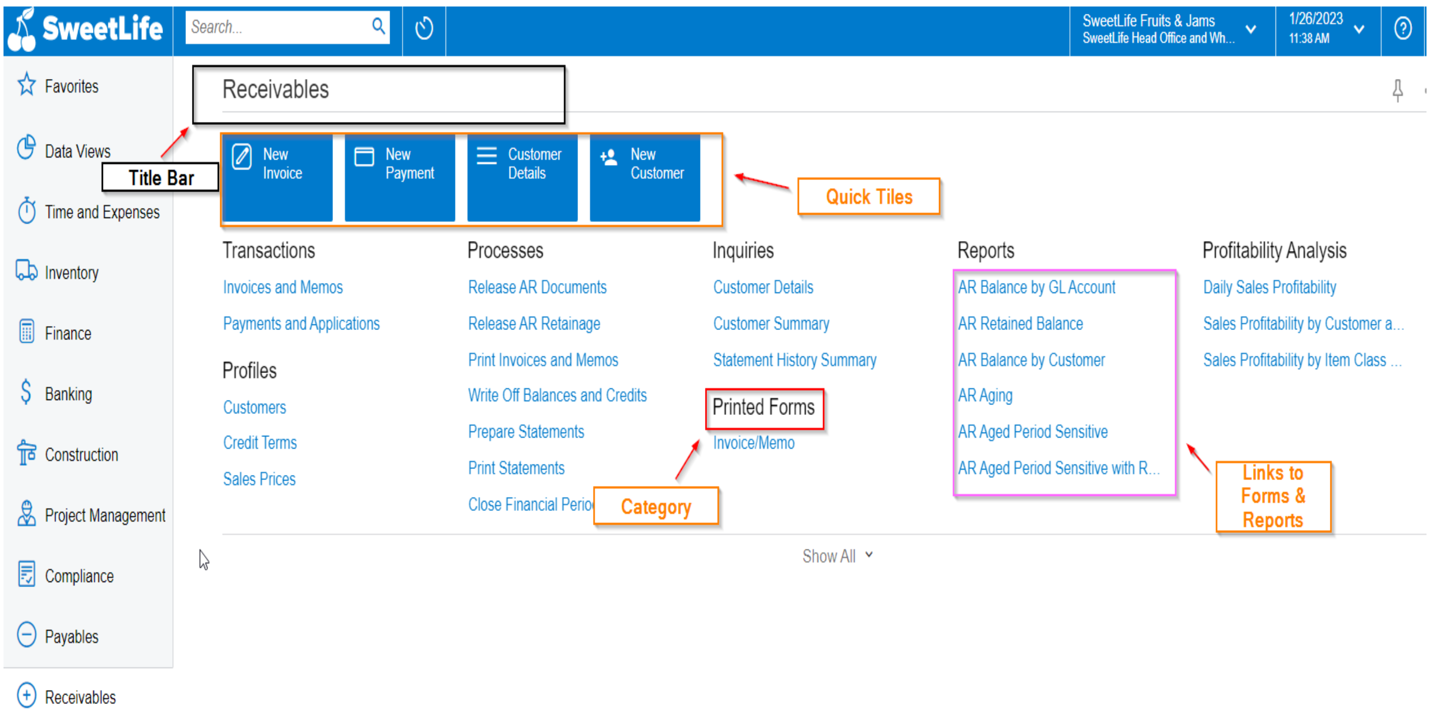
The Answer Company
THE ANSWER COMPANY | 502 - 233 NELSON'S CRESCENTNEW WESTMINSTER, BC V3L 0E4

How to create or change workspace categories?

What is a workspace?

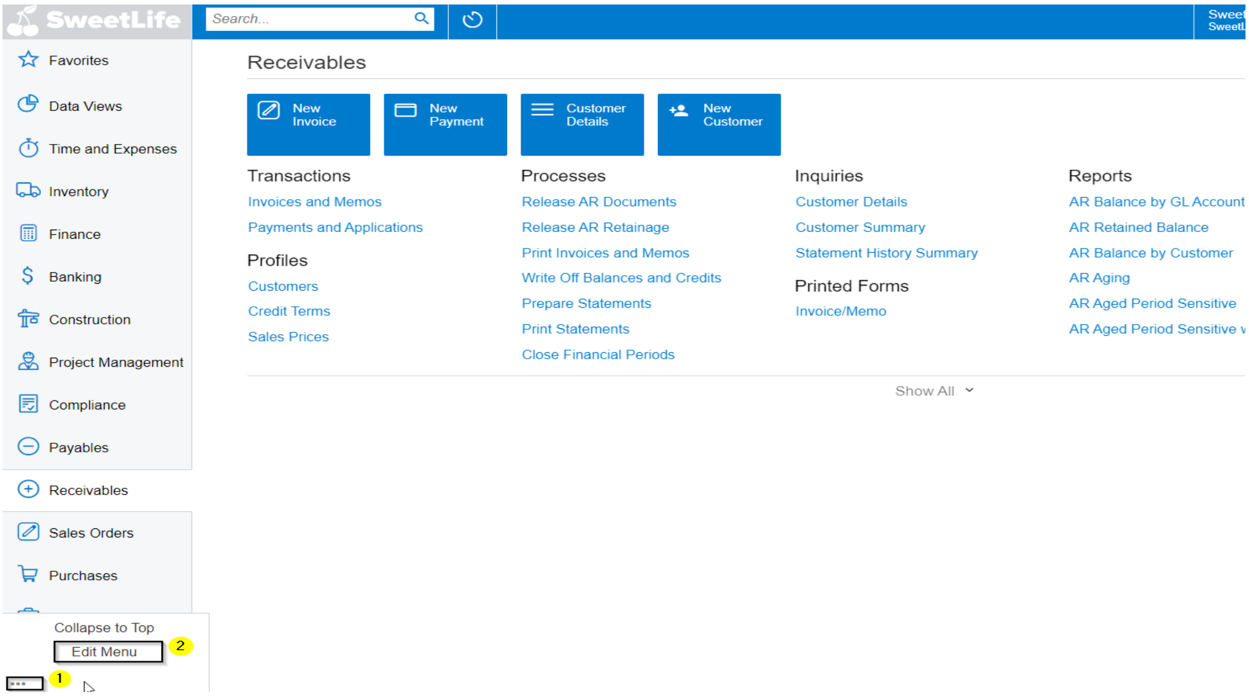
A Workspace is a menu that contains links to the forms and reports of a particular functional area of the product. We will be going through how to set up the basic elements of a workspace. It's easy to setup your workspace to help you and your team to be productive and make your job easier every day!

Overview of terminology that will be used:

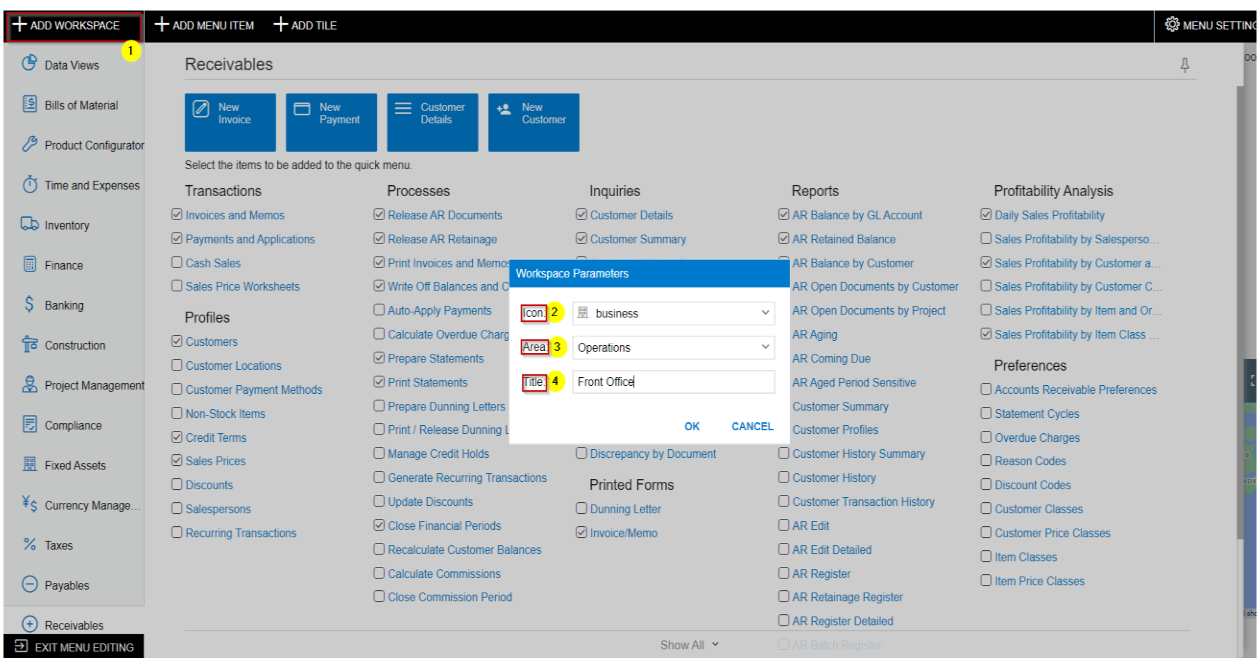


The benefits of making your own workspace in your companies' tenant is to create spaces specific to job functions and have a condensed information that various roles can access easily.

1. To add a new workspace, open up the menu and open the configuration menu (1) and Edit Menu (2).



2. Click on Add Workspace (1) and choose your Icon (2), Area (3) and Title (4) for your new workspace.



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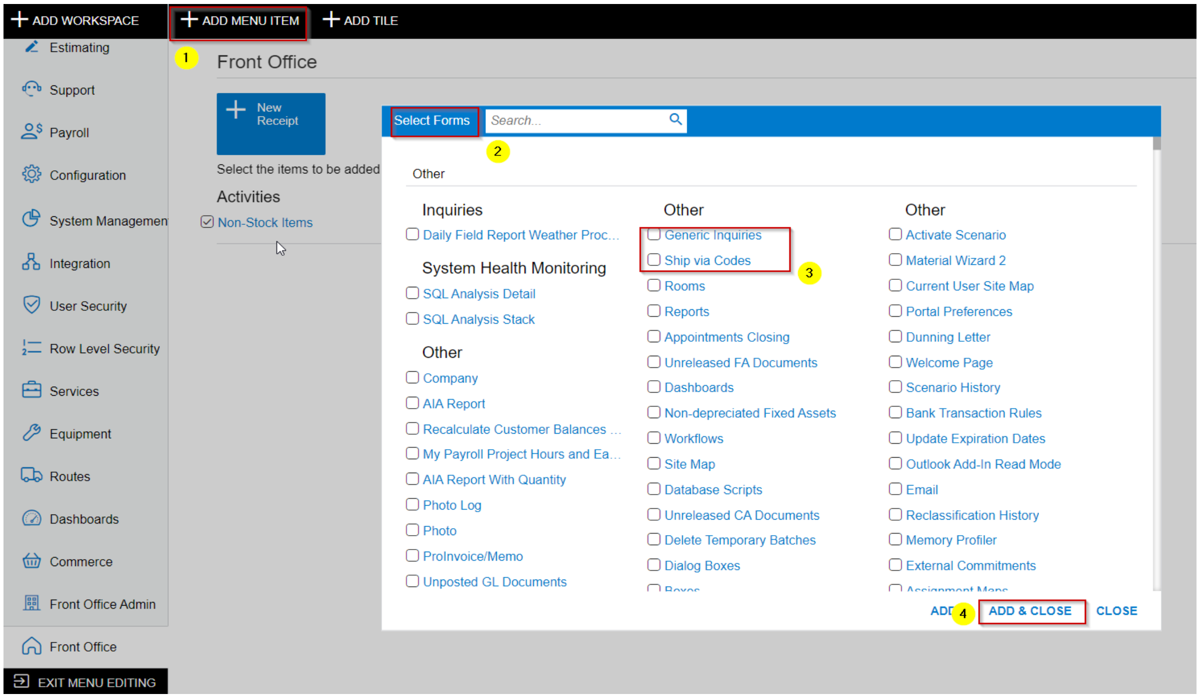
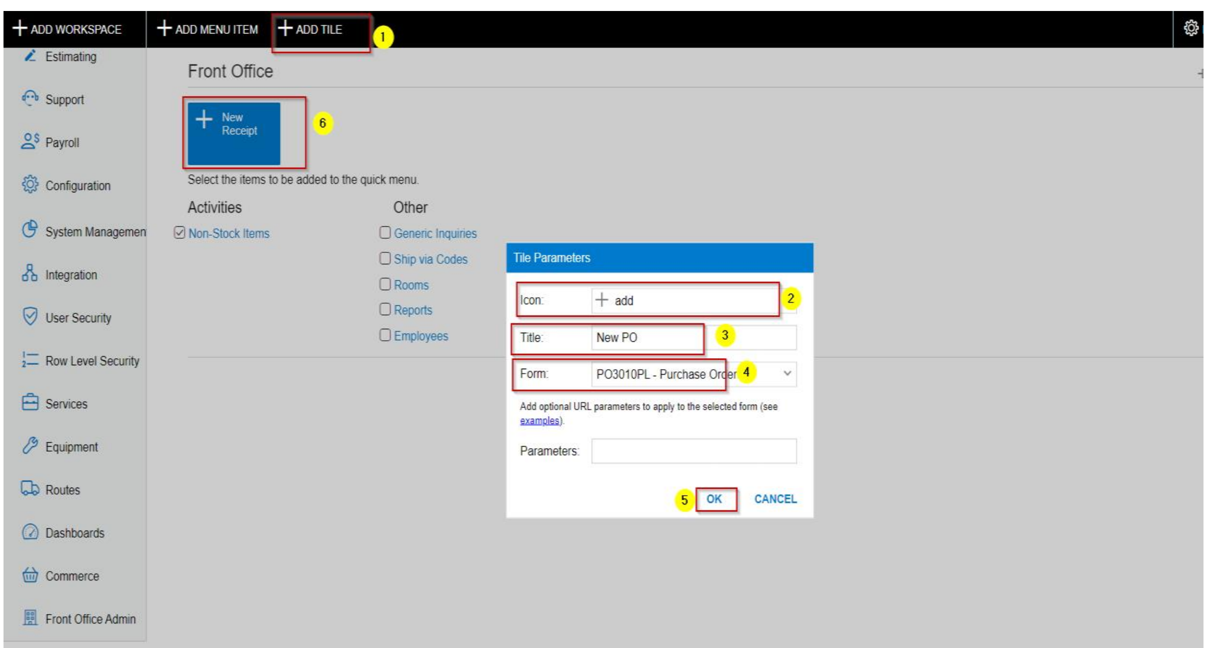
3. Once you have created your workspace, go into your new workspace and Add Menu Item (1) and this area will let you choose what you want displayed in the workspace that users will see (2 &3) and once done with your selection, hit Add & Close (4)



4. You can also add Tiles for quick access to certain forms in Acumatica. Click Add Tile (1), choose Icon (2) that you prefer, type a Title (3) and finally choose the Form (4) that you would want the Tile to be linked to and your final result (6) will be a tile that is quick access to certain functions.



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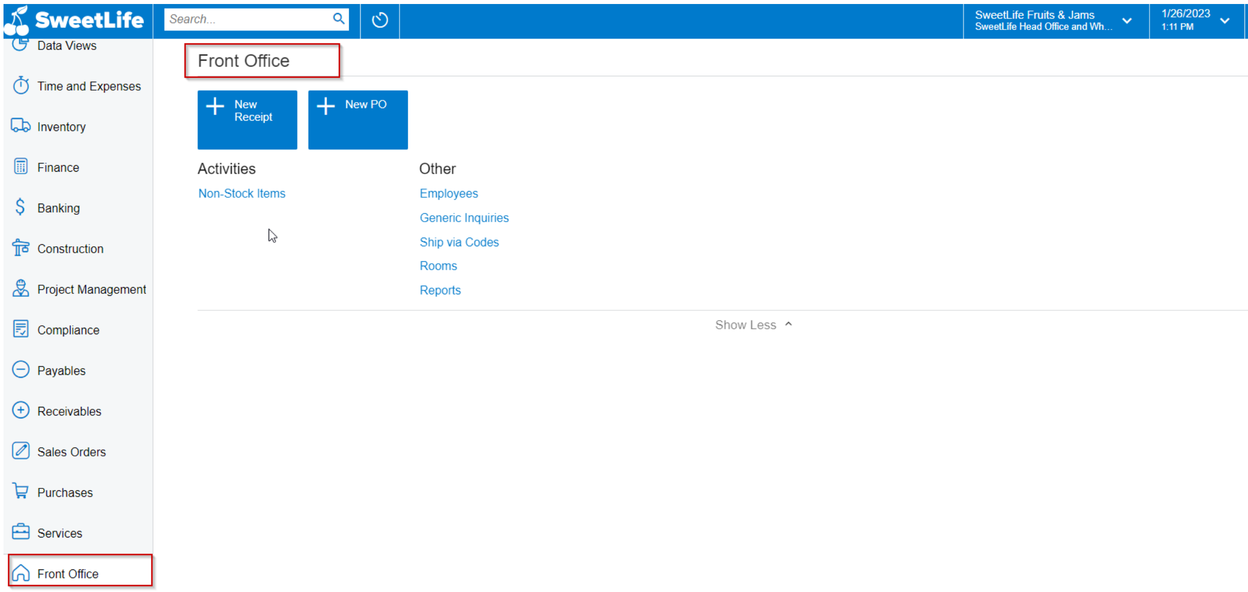
5. Finally, you are done creating your new workspace. Exit Menu Editing and your new workspace is available to use.



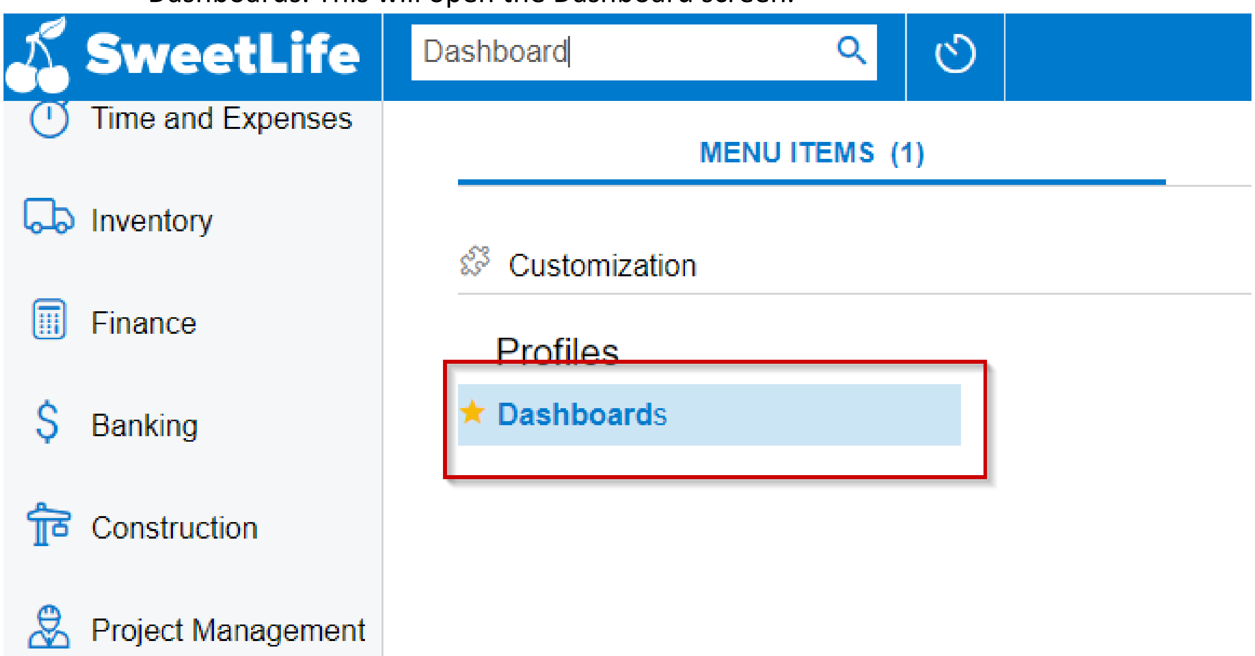
What is a dashboard?

Dashboards are a convenient way to display essential data so you can tell at a glance what you need to know. With Acumatica, you can monitor current financial, operational and organizational information that relate to the user's job.

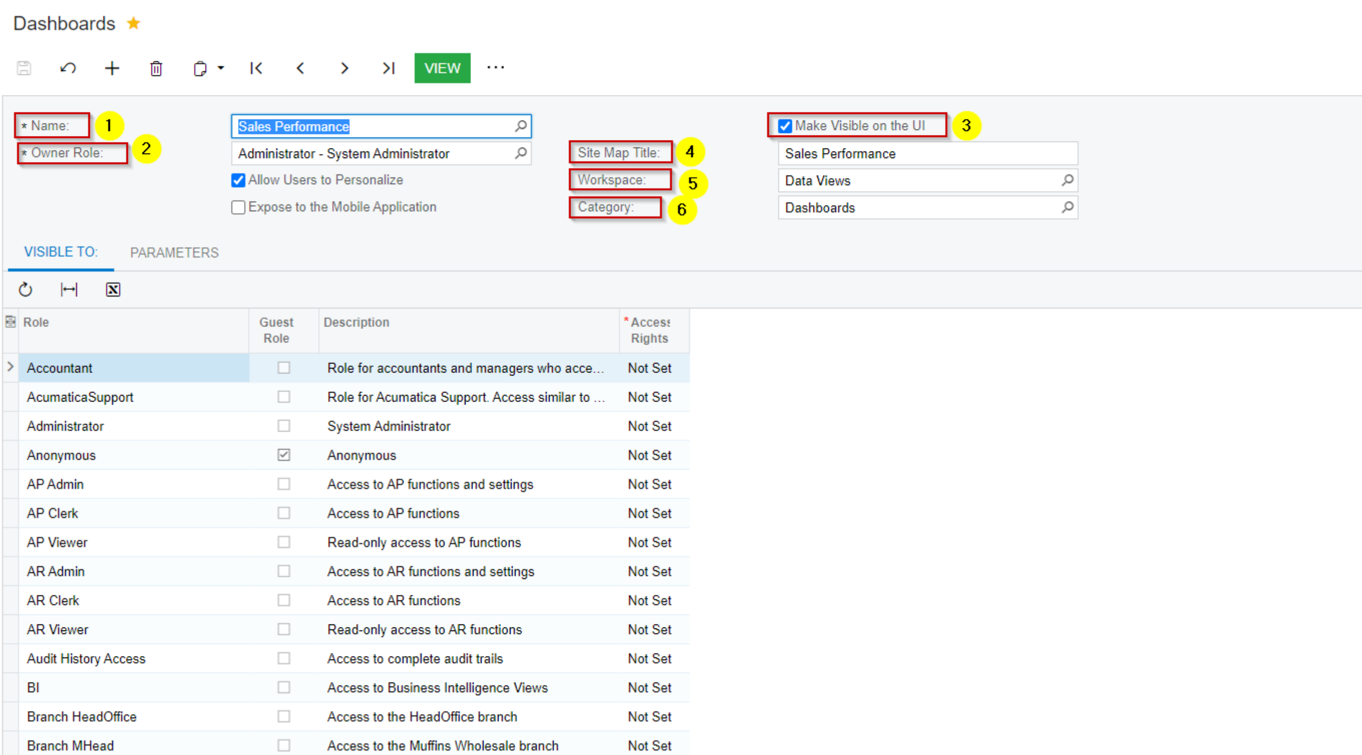
Dashboards offer a way to visualize complex data through widgets that can display a wide variety of data types, including:

- Charts
- Data tables
- Data from external source
- Power BI tiles
- KPI's

1. Use the universal search bar or go into Customization – Profiles and then Dashboards. This will open the Dashboard screen.

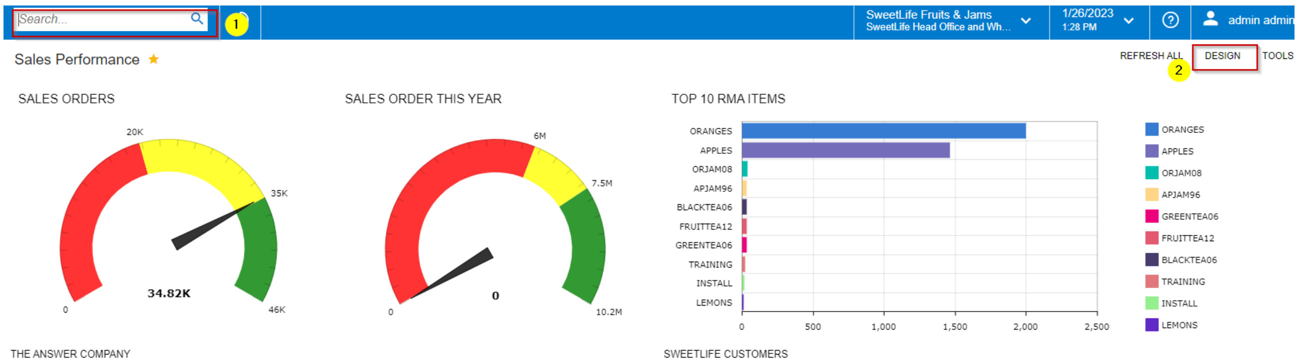


2. Choose and assign the following fields:
   - Name (1): you can either look up an existing dashboard or type in a new dashboard name here.
   - Owner Role (2): Select the role that will be designing and maintaining the dashboard.
   - Make Visible of the UI (3): This will make the dashboard visible on the instance and will need to be assigned where the dashboard will be shown. Choose the Title (4) and the Workspace (5) and Category (6).

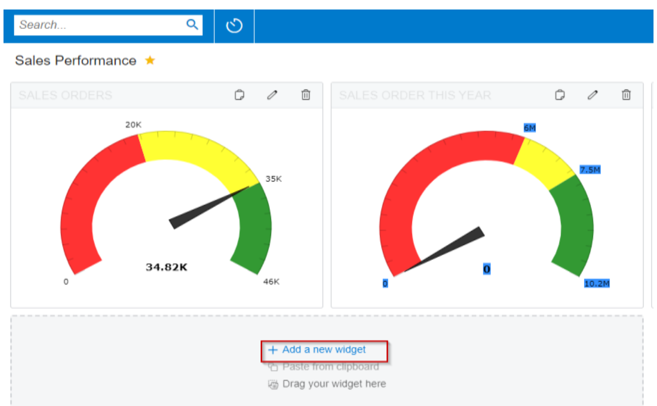


How to design dashboards

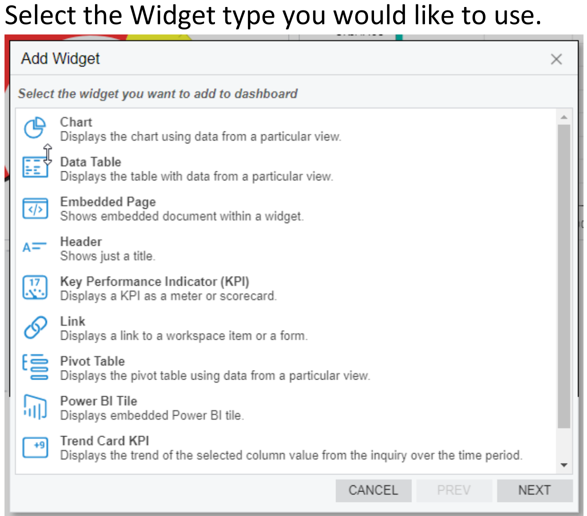
1. Once your dashboard is created, search the dashboard by using the Universal Search (1) or by going to the workspace that you have assigned the dashboard to. Once in the Dashboard click the Design (2) link at the top right.



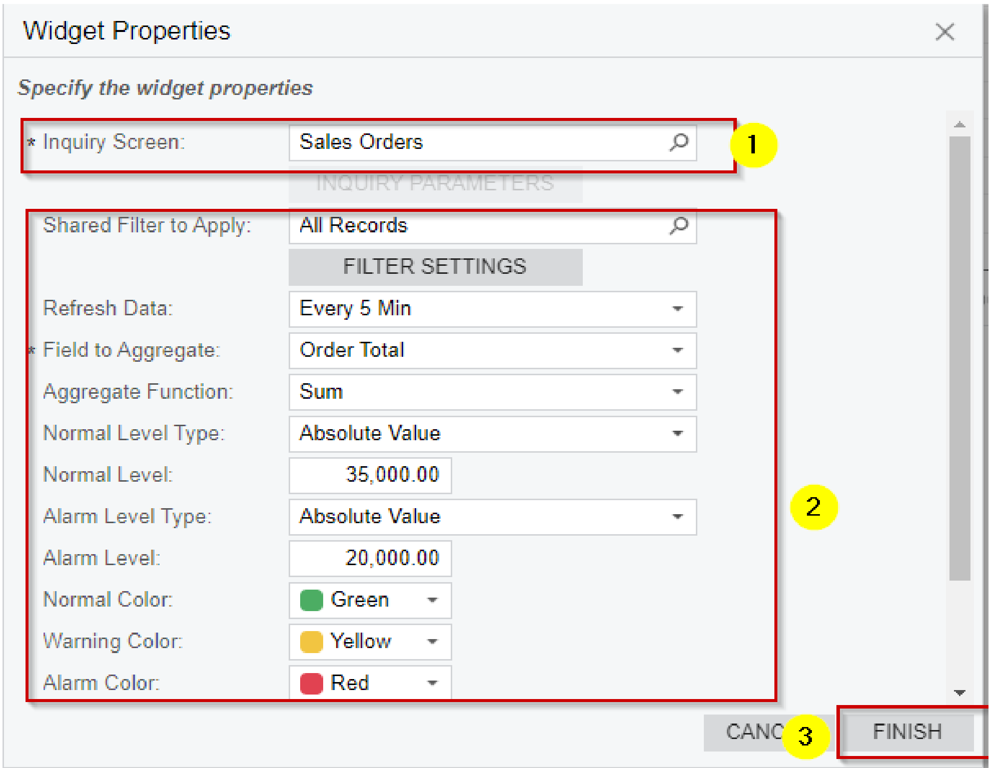
2. Click the add a new widget button



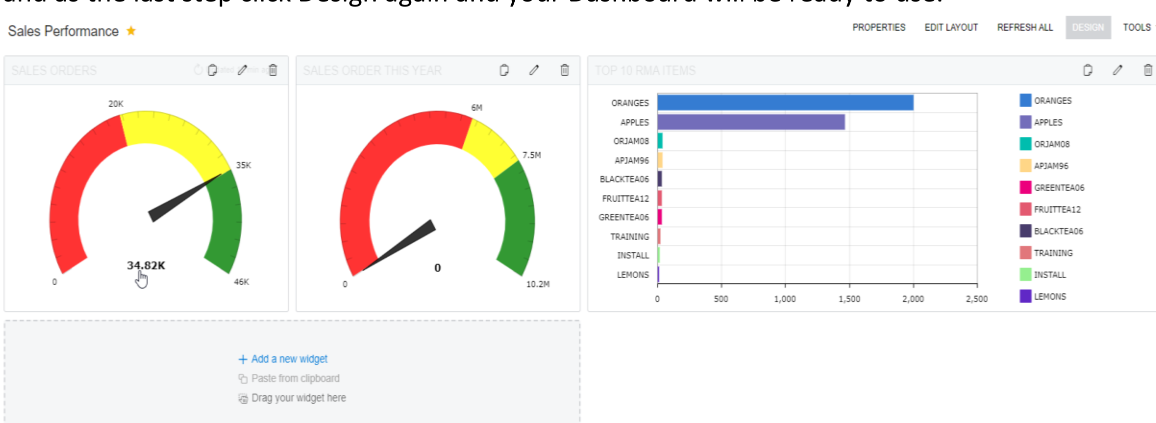
3. Select the Widget type you would like to use.



4. Select the inquiry screen (1) that you would like to display information for and choose all the parameters that you would like the KPI etc (2) to display and click Finish (3).



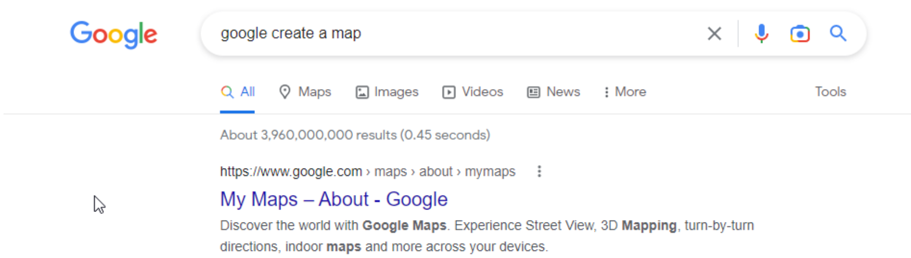
5. After you have finished adding your desired Widgets, you can arrange them in any way you like and as the last step click Design again and your Dashboard will be ready to use.



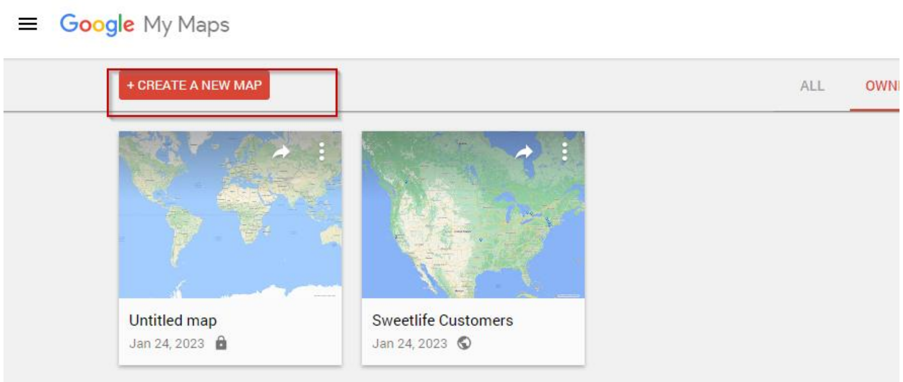
How to add google maps to a dashboard

Step by step guide on how clients can utilize google maps to display vendor locations or customer locations for better understanding of their business.

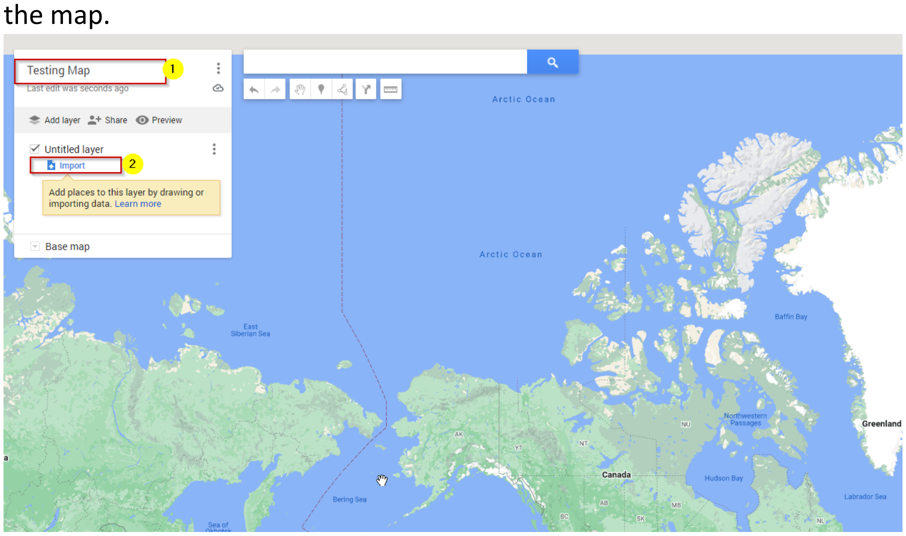
1. Before creating the dashboard widget with the map, we need to first export the list of clients/vendors with their address, city, postal code etc. from Acumatica so that we can import it into the map for google.
2. Once you have the list, we can create the map. The way we achieve that is by looking up "Google create a map" in your browser and click the first link "My Maps".



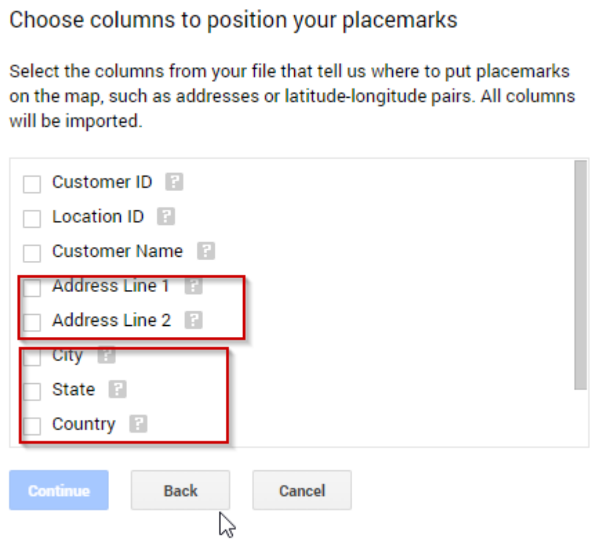
3. Click Create a New Map.



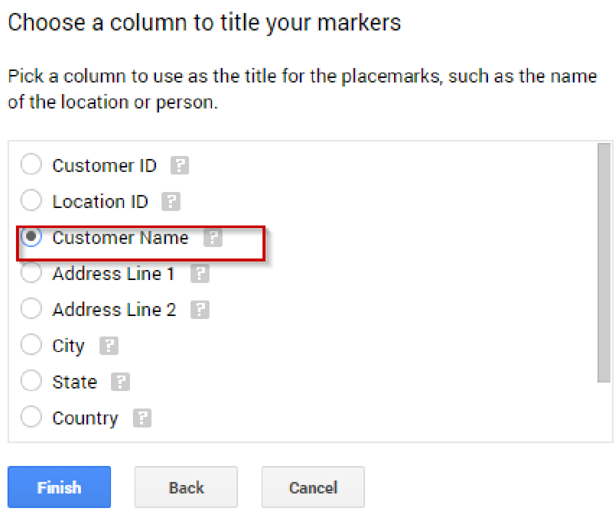
4. Rename your map to any desired name (1) and then Import (2) your list of clients/vendors into the map.



5. Once the file is imported, it will ask for a “Placemarks”. This is where you will choose the address information such as Address Line 1, Address Line 2, City etc.

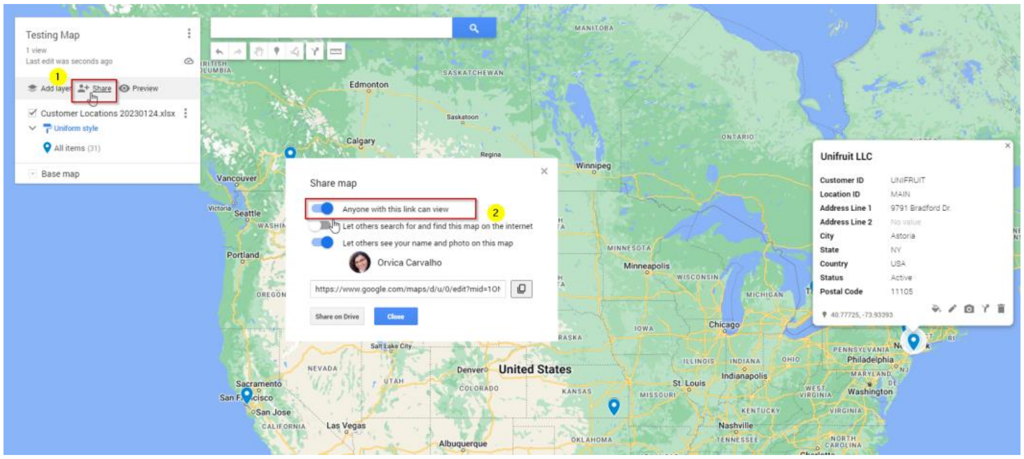


6. Once the place marks have been chosen, the next screen is going to be a selection of what you want you place marks title to be. Here we will choose the “Customer Name” or “Vendor Name” as the title.

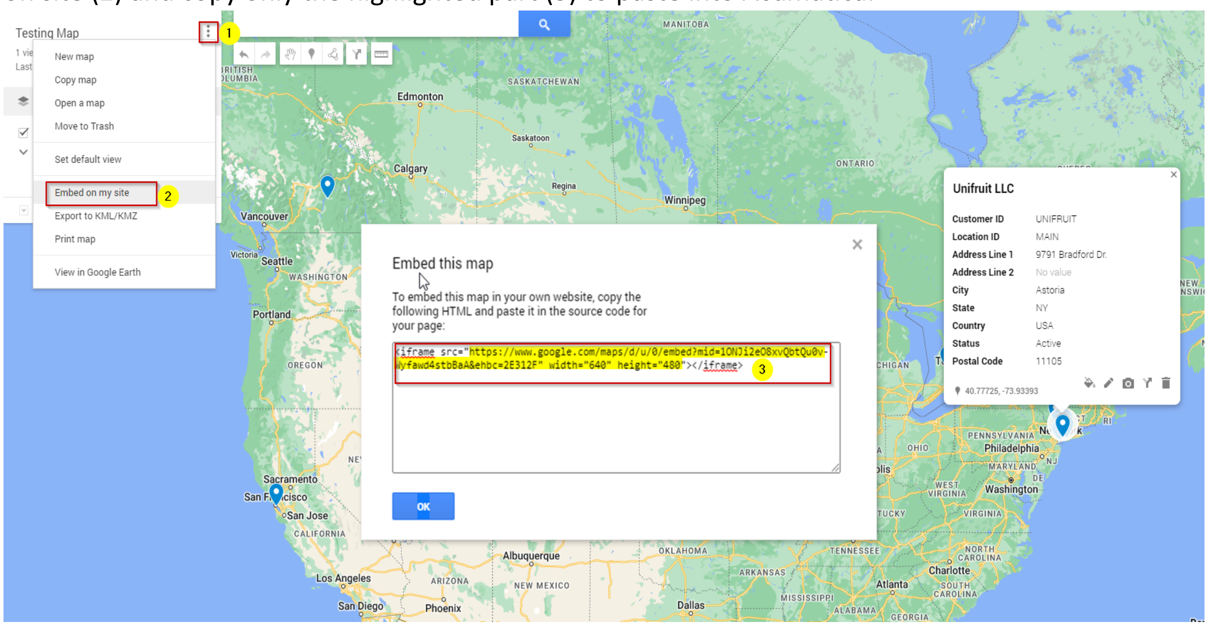


7. Now we need to make sure the map is Shared so that it can embed onto our widget in Acumatica. Click Share (1) and Anyone with this link can view (2) and Close. This will enable us to

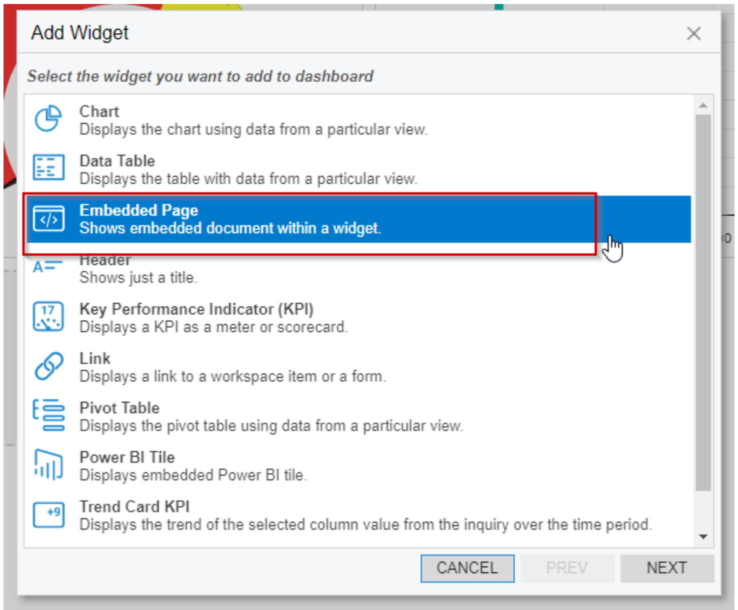
use the map in our Acumatica environment.



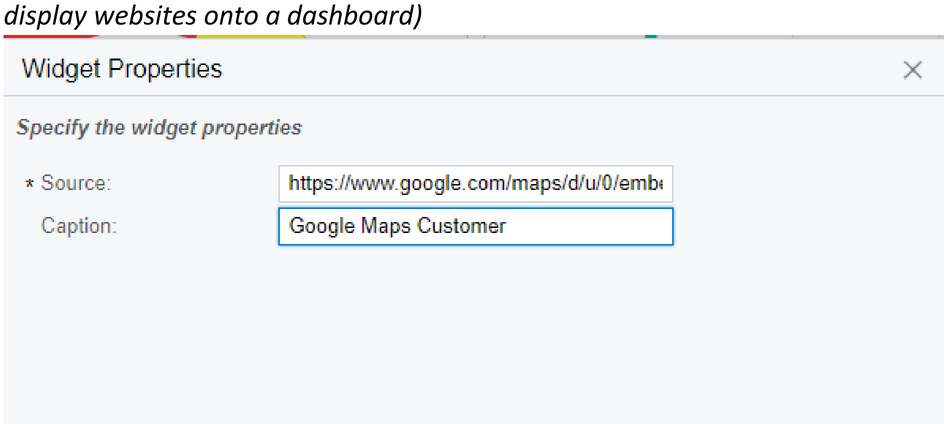
8. Once the map is shared, we are going to get the embed link to put it onto our site. Click embed on site (2) and copy only the highlighted part (3) to paste into Acumatica.

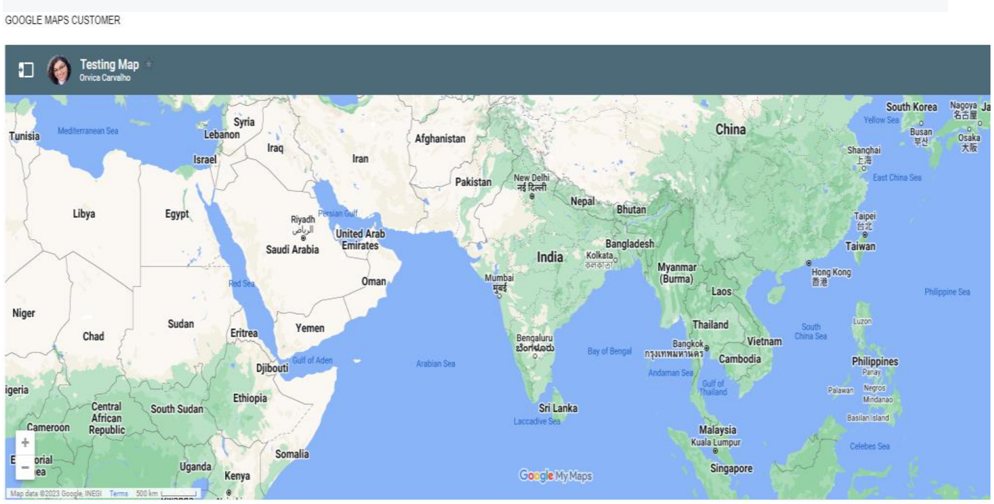


9. Go back to the Acumatica environment and follow the steps to design a dashboard and add a new widget. Choose Embedded Page.



10. Paste the embed link into the source bar and assign a caption to the widget. Click Finish and your map is ready to use on your dashboard. *(You can use the embed page widget to even display websites onto a dashboard)*





How to create a business event for automated email

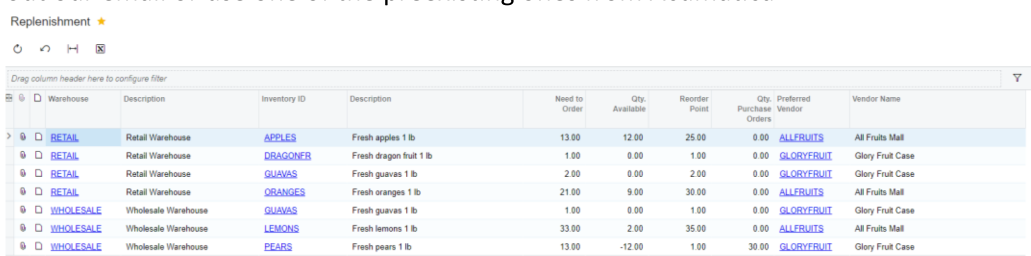
What is a business event?

Business Events provide the ability to react to data changes by creating email notifications and updating business data. This means that you can automate complex business processes without programming.

The system allows you to automate many diverse business scenarios, such as:
- Warning customers of upcoming invoice due dates.
- Notifying customers when their orders are ready for delivery or pickup and many more scenarios
- Creating email reports that are sent out automatically for reporting purposes.

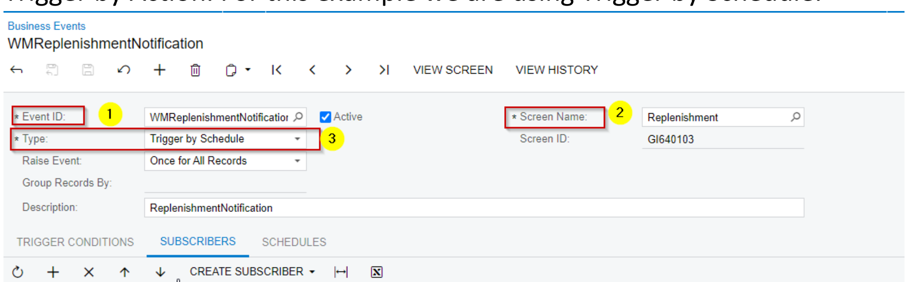
Step by step guide on how to create business events

1. Acumatica Business Events are driven from Generic Inquiries. To begin the implementation, we need to write a generic inquiry that contains the information that we are going to use to send out our email or use one of the preexisting ones from Acumatica

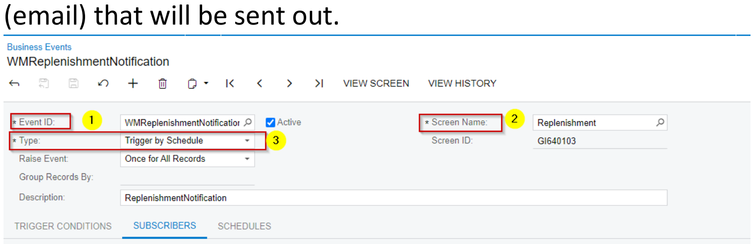


Warehouse	Description	Inventory ID	Description	Need to Order	Qty. Available	Reorder Point	Qty. Purchase Orders	Preferred Vendor	Vendor Name
RETAIL	Retail Warehouse	APPLES	Fresh apples 1 lb	13.00	12.00	25.00	0.00	ALLFRUITS	All Fruits Mall
RETAIL	Retail Warehouse	DRAGONFR	Fresh dragon fruit 1 lb	1.00	0.00	1.00	0.00	GLORYFRUIT	Glory Fruit Case
RETAIL	Retail Warehouse	GUAVAS	Fresh guavas 1 lb	2.00	0.00	2.00	0.00	GLORYFRUIT	Glory Fruit Case
RETAIL	Retail Warehouse	ORANGES	Fresh oranges 1 lb	21.00	9.00	30.00	0.00	ALLFRUITS	All Fruits Mall
WHOLESALE	Wholesale Warehouse	GUAVAS	Fresh guavas 1 lb	1.00	0.00	1.00	0.00	GLORYFRUIT	Glory Fruit Case
WHOLESALE	Wholesale Warehouse	LEMONS	Fresh lemons 1 lb	33.00	2.00	35.00	0.00	ALLFRUITS	All Fruits Mall
WHOLESALE	Wholesale Warehouse	PEARS	Fresh pears 1 lb	13.00	-12.00	1.00	30.00	GLORYFRUIT	Glory Fruit Case

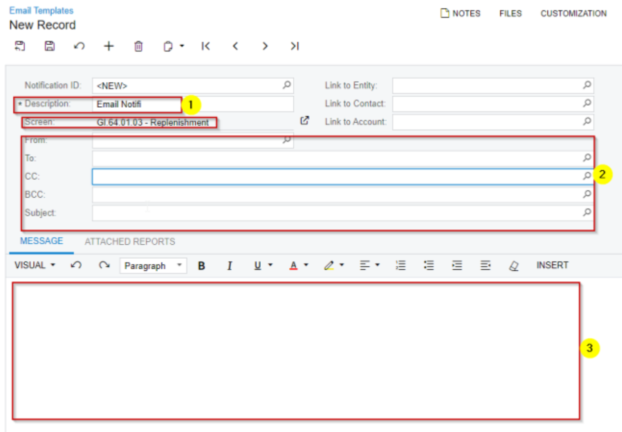
2. Create the Business Event
   a. Define the Event ID (1)
   b. Select the Generic Inquiry that you want to use the information from (2)
   c. Define the Type (3). The type could be Trigger by Record Change, Tigger by Schedule or Trigger by Action. For this example we are using Trigger by Schedule.



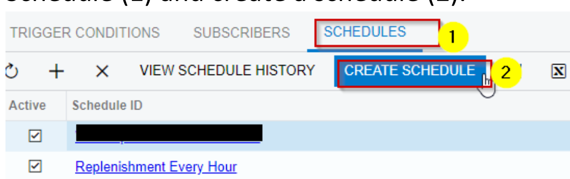
   d. Navigate to the Subscribers tab, this will allow you to create a notification template (email) that will be sent out.



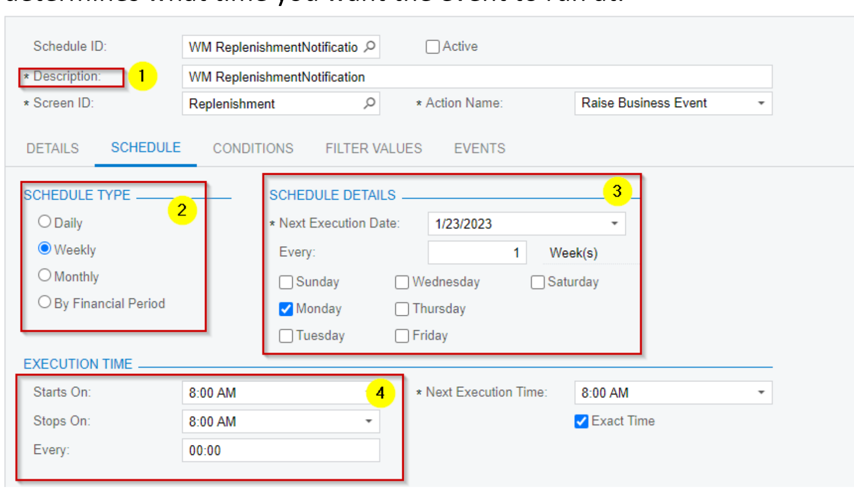
e. On the email notification screen, fill out the description of the notification and all corresponding information such as the From/To/Subject (2) and in the Message (3) field, this is where you will build the contents of your email and what you would like to entail.



f. Once you email template is done, navigate to the business event again and go into Schedule (1) and create a schedule (2).



g. In the Automation Schedule, define the Description (1), Schedule Type (2) if it's going to be daily/weekly etc. Define the Schedule details (3) such as the next execution date and what days you want the business event to run. Define the Execution Time (4), this determines what time you want the event to run at.



h. Your Business event is ready to use.

Please do not hesitate to contact [The Answer Company](https://www.theanswerco.com) for any assistance. Our consultants are there to help!