



THE ANSWER COMPANY

Acumatica Tips and Tricks

WORKSPACES, DASHBOARDS AND AUTOMATED REPORTS



The Answer Company

THE ANSWER COMPANY | 502 - 233 NELSON'S CRESCENT NEW WESTMINSTER, BC V3L 0E4

How to create or change workspace categories?

What is a workspace?

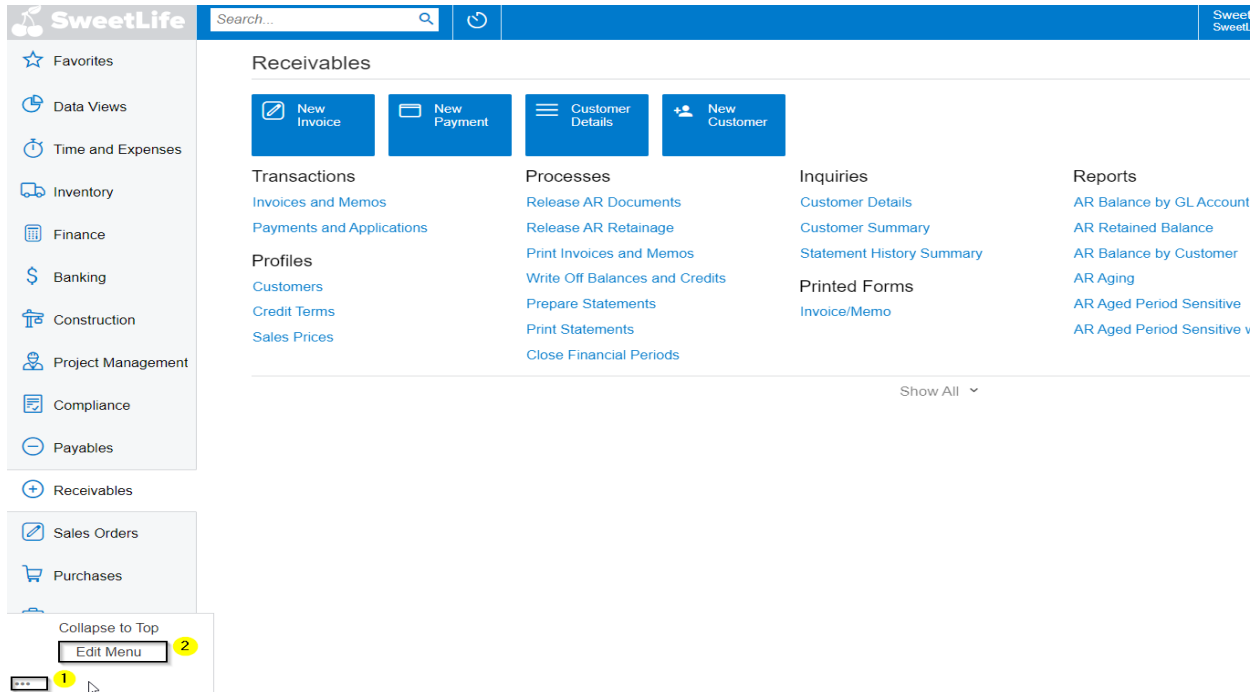
A Workspace is a menu that contains links to the forms and reports of a particular functional area of the product. We will be going through how to set up the basic elements of a workspace. It's easy to setup your workspace to help you and your team to be productive and make your job easier every day!

Overview of terminology that will be used:

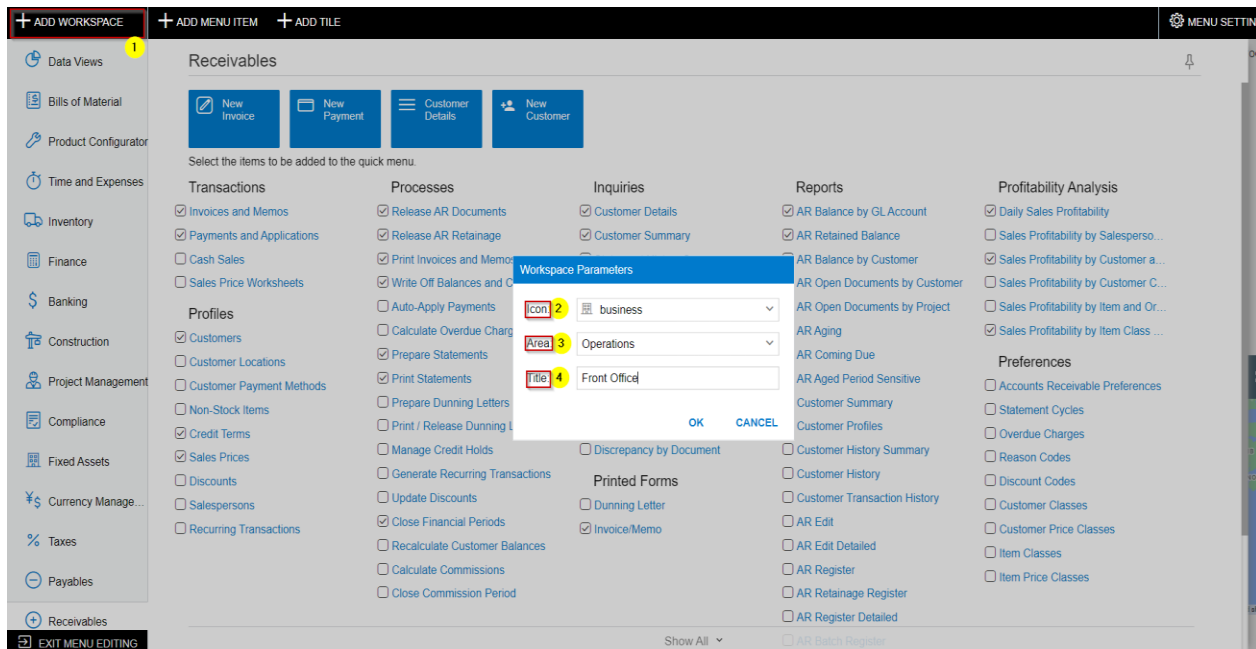
The screenshot displays the SweetLife software interface for the 'Receivables' workspace. The top navigation bar includes the SweetLife logo, a search bar, and user information for 'SweetLife Fruits & Jams'. The left sidebar lists various functional areas, with 'Receivables' selected. The main content area is titled 'Receivables' and contains several categories: Transactions, Profiles, Processes, Inquiries, Reports, and Profitability Analysis. Annotations highlight key elements: 'Title Bar' points to the workspace header, 'Quick Tiles' points to 'New Invoice', 'New Payment', 'Customer Details', and 'New Customer' buttons, 'Printed Forms' points to 'Invoice/Memo' under Inquiries, 'Category' points to the 'Processes' section, and 'Links to Forms & Reports' points to the 'Reports' section.

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.

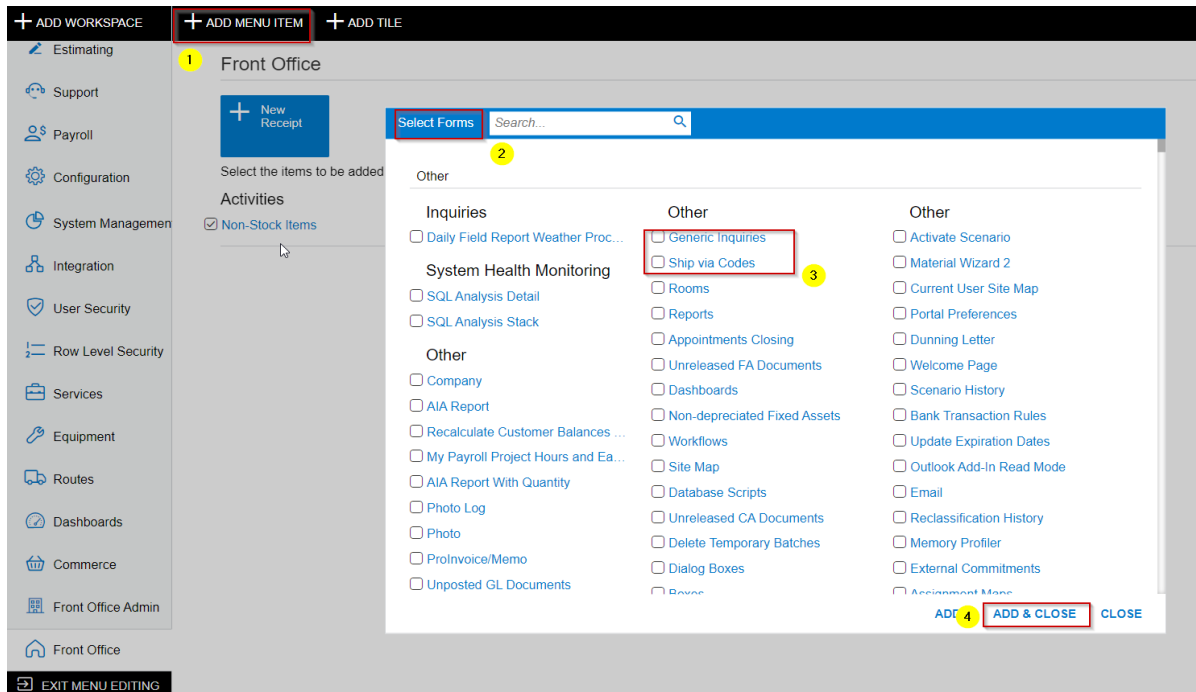
- To add a new workspace, open up the menu and open the configuration menu (1) and Edit Menu (2).



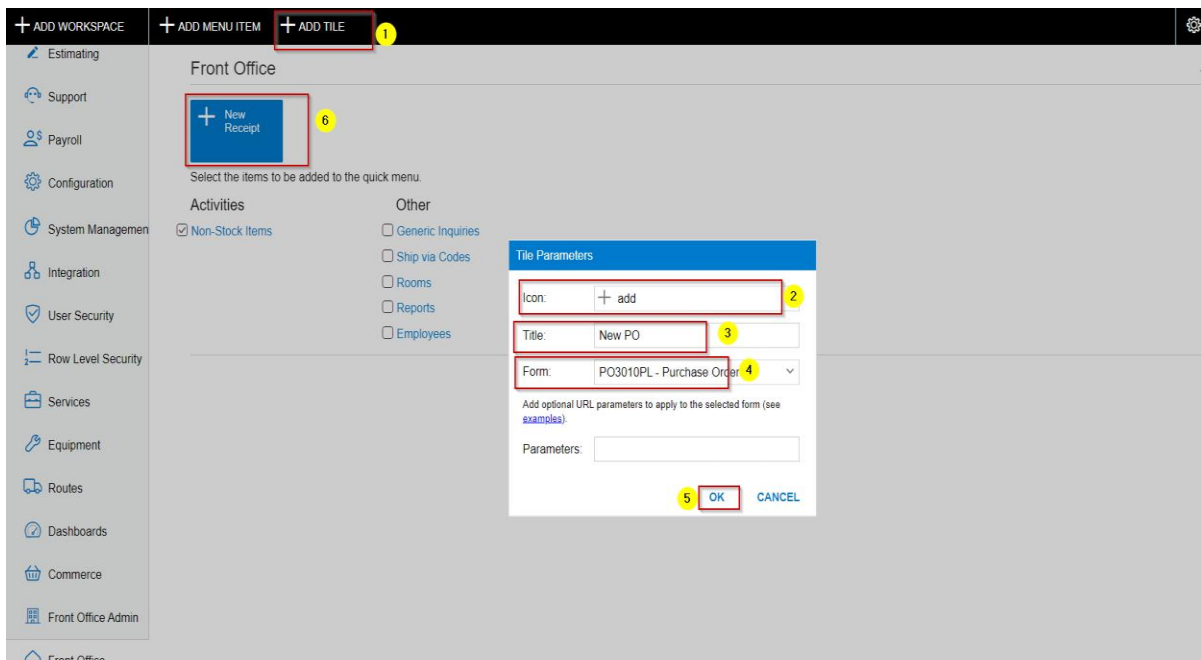
- Click on Add Workspace (1) and choose your Icon (2), Area (3) and Title (4) for your new workspace.



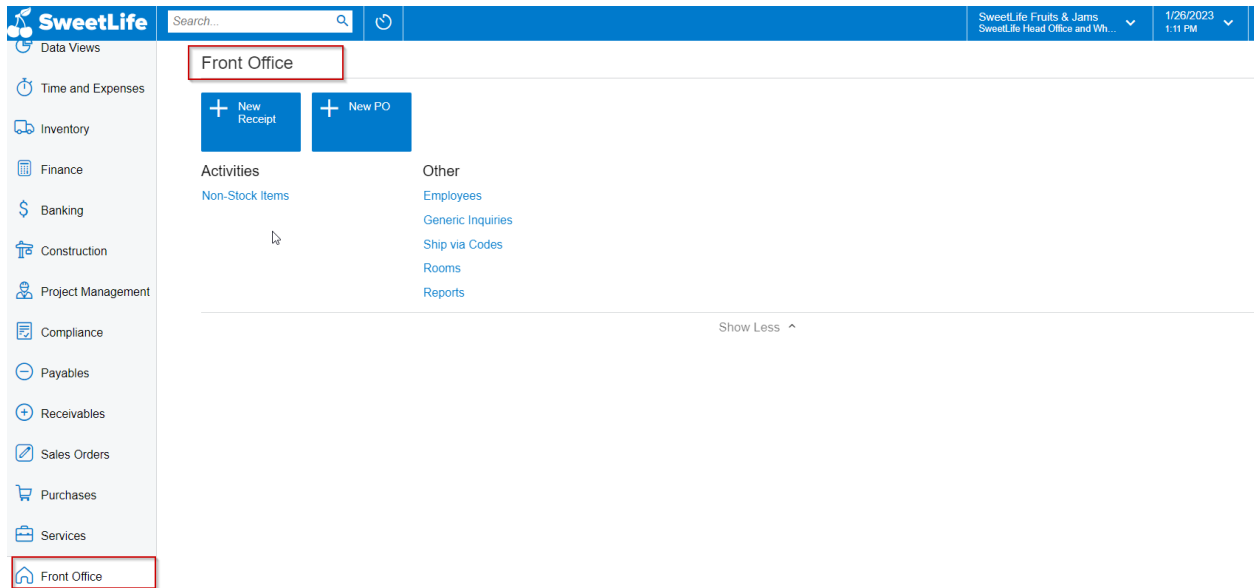
3. Once you have created your workspace, go into your new workspace and Add Menu Item (1) and this area will let you choose what you want displayed in the workspace that users will see (2 & 3) and once done with your selection, hit Add & Close (4)



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.



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



How to create Dashboards and Widgets in Acumatica

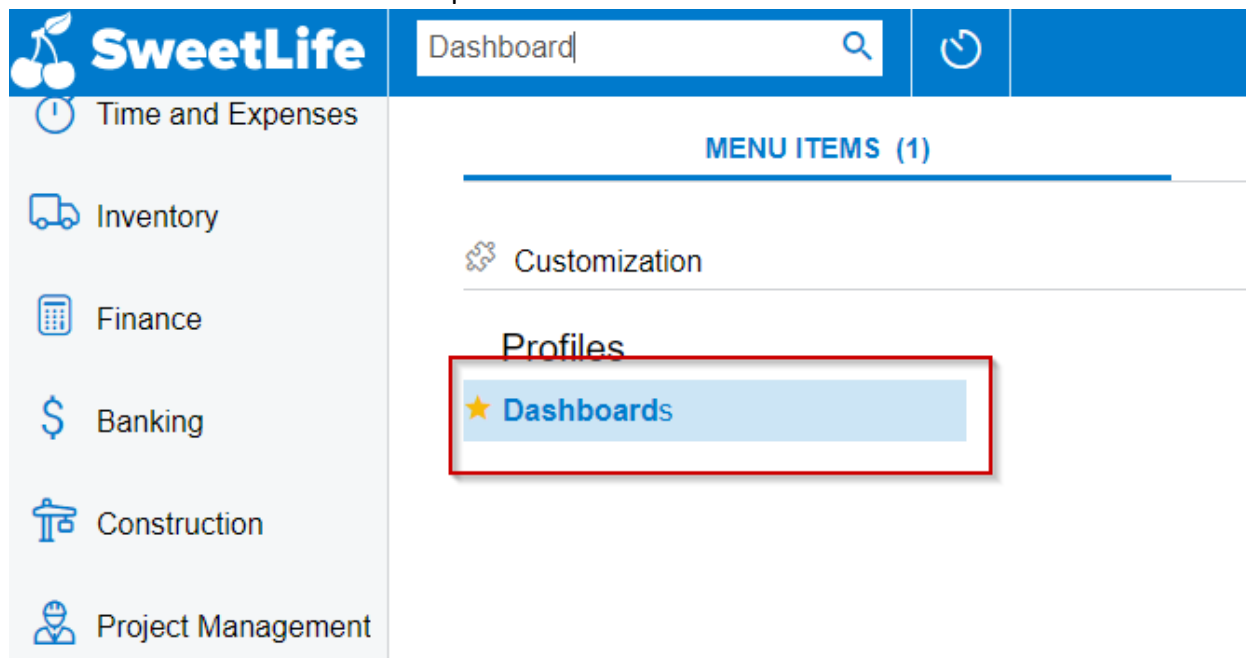
What is a dashboard?

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).

Dashboards ★

* Name: 1

* Owner Role: 2

Allow Users to Personalize

Expose to the Mobile Application

Site Map Title: 4

Workspace: 5

Category: 6

Make Visible on the UI 3

Sales Performance

Data Views

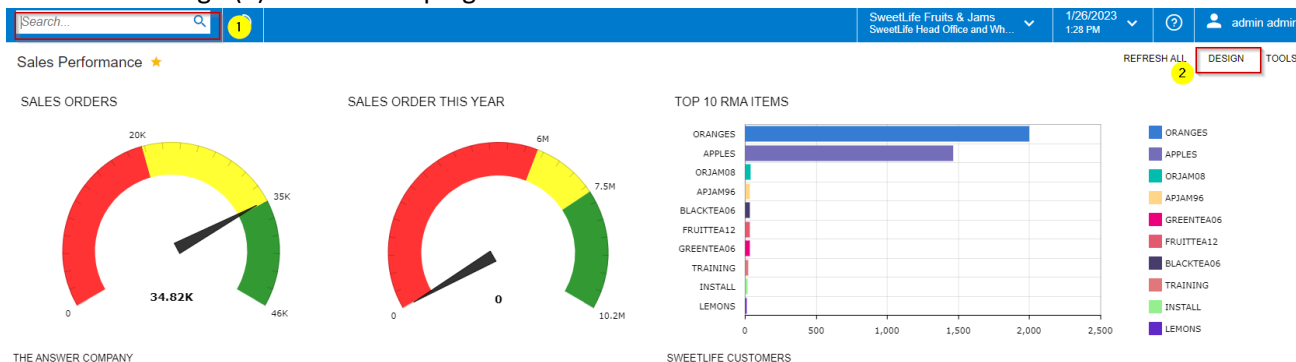
Dashboards

VISIBLE TO: PARAMETERS

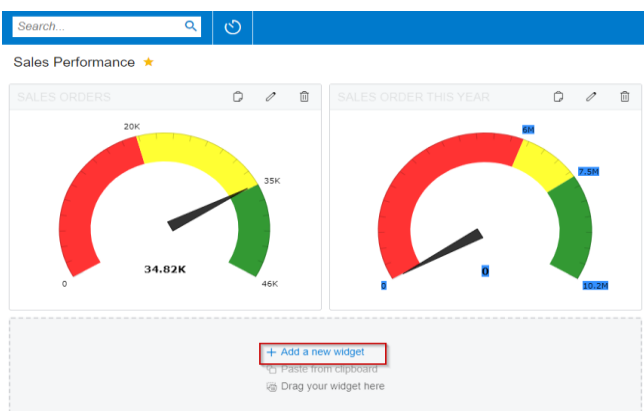
Role	Guest Role	Description	* Access Rights
> Accountant	<input type="checkbox"/>	Role for accountants and managers who acce...	Not Set
AcumaticaSupport	<input type="checkbox"/>	Role for Acumatica Support. Access similar to ...	Not Set
Administrator	<input type="checkbox"/>	System Administrator	Not Set
Anonymous	<input checked="" type="checkbox"/>	Anonymous	Not Set
AP Admin	<input type="checkbox"/>	Access to AP functions and settings	Not Set
AP Clerk	<input type="checkbox"/>	Access to AP functions	Not Set
AP Viewer	<input type="checkbox"/>	Read-only access to AP functions	Not Set
AR Admin	<input type="checkbox"/>	Access to AR functions and settings	Not Set
AR Clerk	<input type="checkbox"/>	Access to AR functions	Not Set
AR Viewer	<input type="checkbox"/>	Read-only access to AR functions	Not Set
Audit History Access	<input type="checkbox"/>	Access to complete audit trails	Not Set
BI	<input type="checkbox"/>	Access to Business Intelligence Views	Not Set
Branch HeadOffice	<input type="checkbox"/>	Access to the HeadOffice branch	Not Set
Branch MHead	<input type="checkbox"/>	Access to the Muffins Wholesale branch	Not Set

How to design dashboards

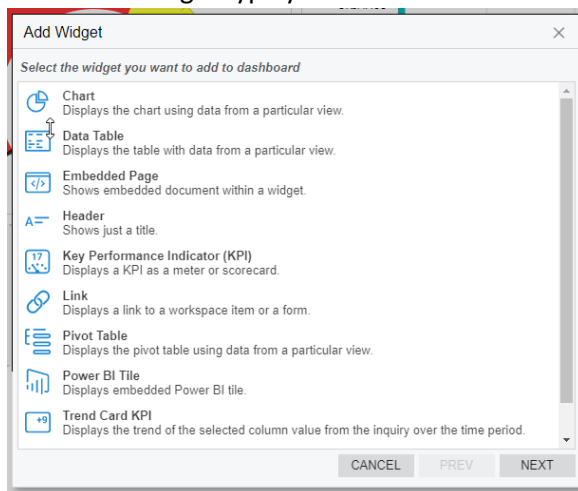
- Once your dashboard is created, search the dashboard by using the Universal Search (1) or by going to the workspace that you have assigned the dashboard to. Once in the Dashboard click the Design (2) link at the top right.



- Click the add a new widget button



- Select the Widget type you would like to use.



- 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).

Widget Properties

Specify the widget properties

* Inquiry Screen: Sales Orders

INQUIRY PARAMETERS

Shared Filter to Apply: All Records

FILTER SETTINGS

Refresh Data: Every 5 Min

* Field to Aggregate: Order Total

Aggregate Function: Sum

Normal Level Type: Absolute Value

Normal Level: 35,000.00

Alarm Level Type: Absolute Value

Alarm Level: 20,000.00

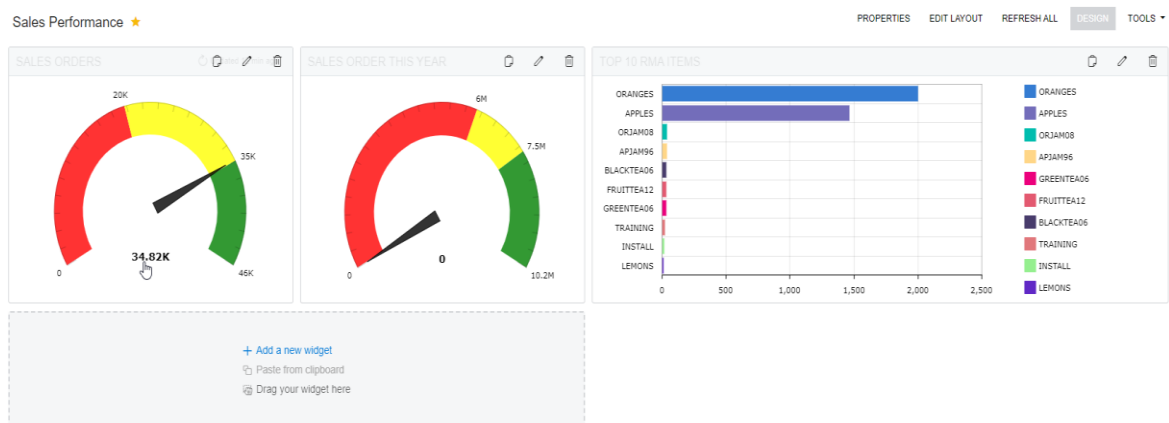
Normal Color: Green

Warning Color: Yellow

Alarm Color: Red

CANCEL FINISH

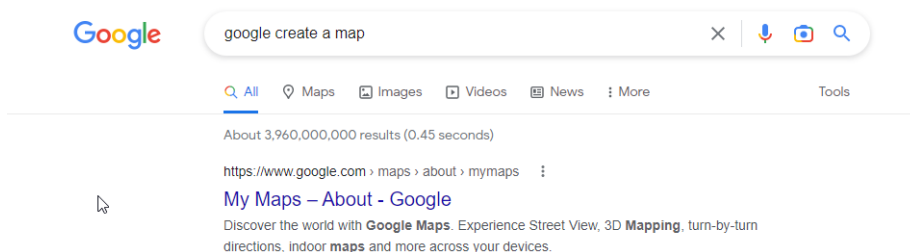
- After you have finished adding your desired Widgets, you can arrange them in any way you like and as the last step click Design again and your Dashboard will be ready to use.



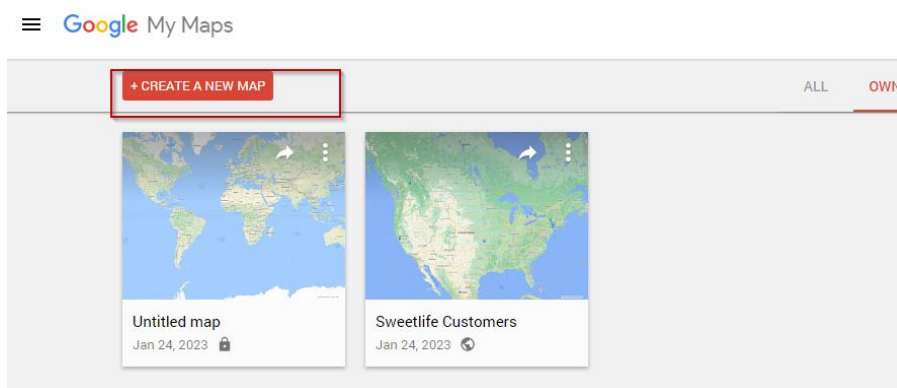
How to add google maps to a dashboard

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

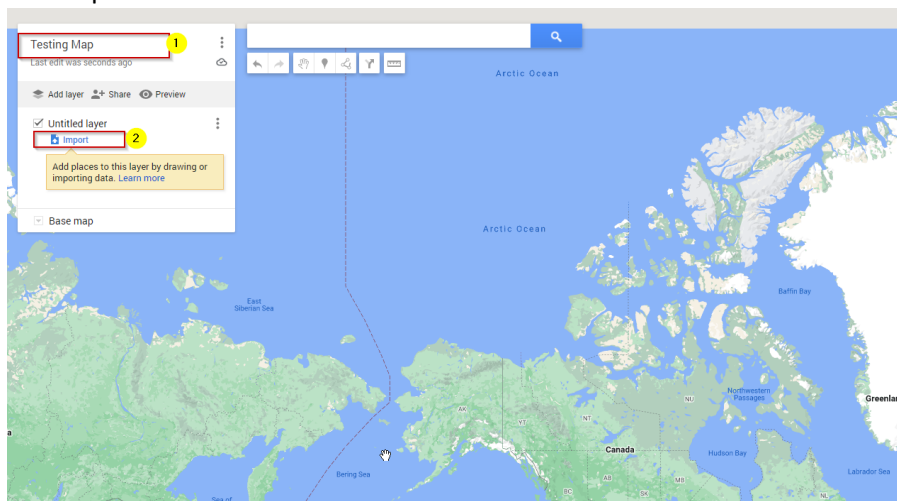
1. Before creating the dashboard widget with the map, we need to first export the list of clients/vendors with their address, city, postal code etc. from Acumatica so that we can import it into the map for google.
2. Once you have the list, we can create the map. The way we achieve that is by looking 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.



- 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.

Choose columns to position your placemarks

Select the columns from your file that tell us where to put placemarks on the map, such as addresses or latitude-longitude pairs. All columns will be imported.

Customer ID ?

Location ID ?

Customer Name ?

Address Line 1 ?

Address Line 2 ?

City ?

State ?

Country ?

- 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.

Choose a column to title your markers

Pick a column to use as the title for the placemarks, such as the name of the location or person.

Customer ID ?

Location ID ?

Customer Name ?

Address Line 1 ?

Address Line 2 ?

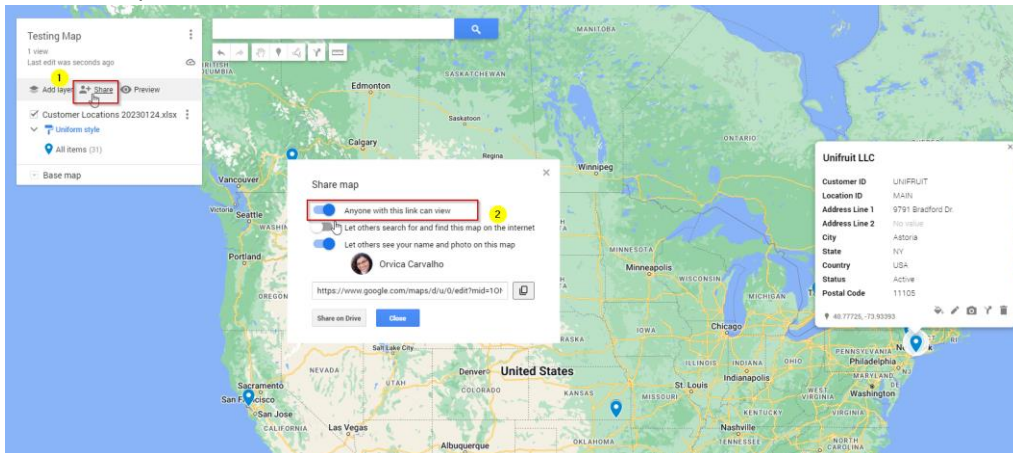
City ?

State ?

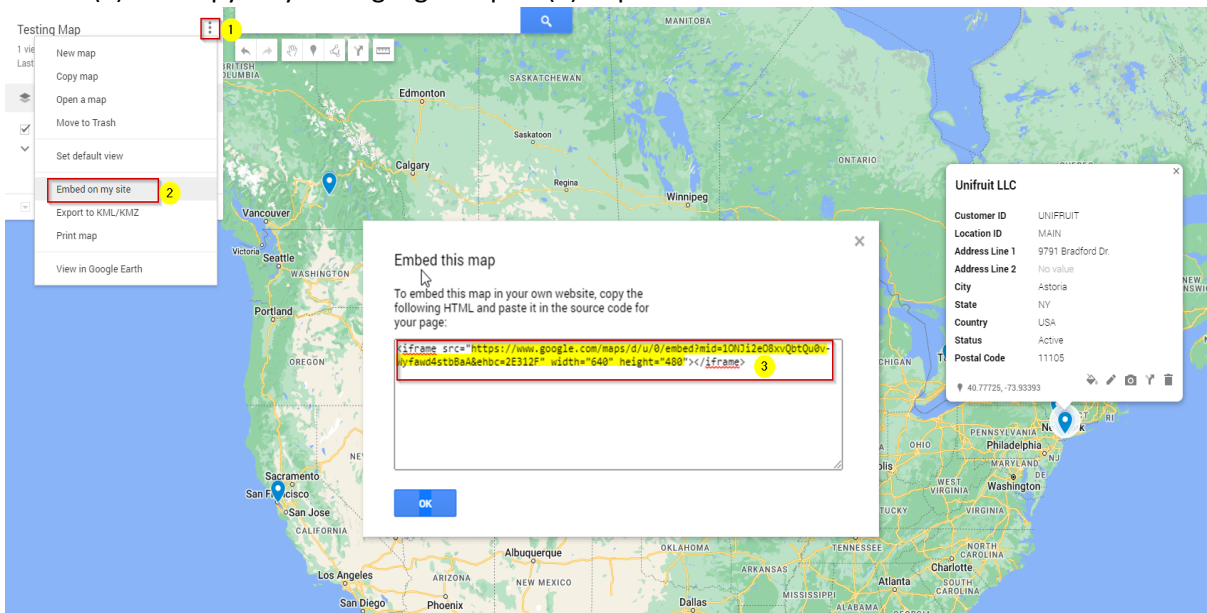
Country ?

- 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

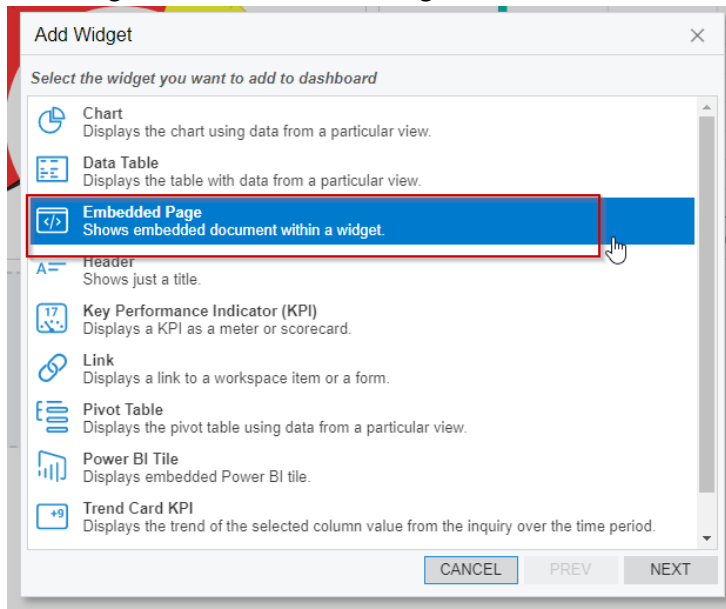
use the map in our Acumatica environment.



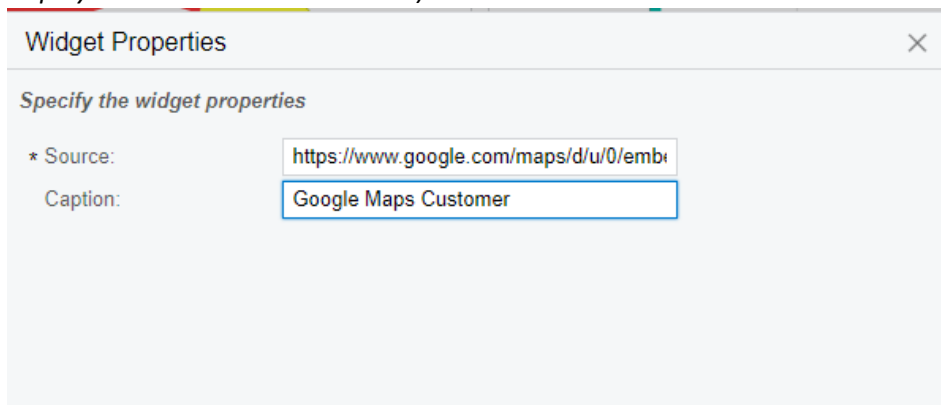
- Once the map is shared, we are going to get the embed link to put it onto our site. Click embed on site (2) and copy only the highlighted part (3) to paste into Acumatica.



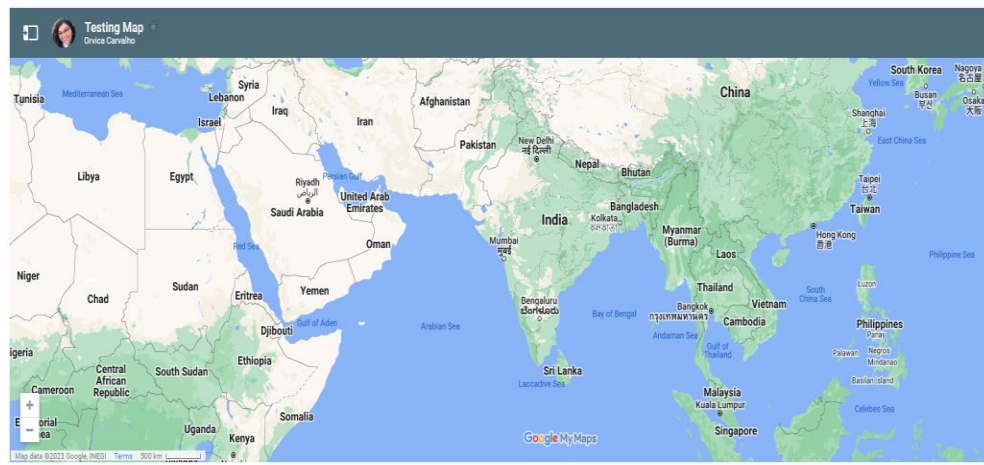
9. Go back to the Acumatica environment and follow the steps to design a dashboard and add a new widget. Choose Embedded Page.



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)



GOOGLE MAPS CUSTOMER



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

Replenishment *

Drag column header here to configure filter

	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 Mail
⊞	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 Mail
⊞	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 Mail
⊞	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, Trigger by Schedule or Trigger by Action. For this example we are using Trigger by Schedule.

Business Events

WMReplenishmentNotification

VIEW SCREEN VIEW HISTORY

Event ID: 1 WMReplenishmentNotification Active

Screen Name: 2 Replenishment

Type: 3 Trigger by Schedule

Screen ID: G1640103

Raise Event: Once for All Records

Group Records By:

Description: ReplenishmentNotification

TRIGGER CONDITIONS SUBSCRIBERS SCHEDULES

CREATE SUBSCRIBER

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

Business Events

WMReplenishmentNotification

VIEW SCREEN VIEW HISTORY

Event ID: 1 WMReplenishmentNotification Active

Screen Name: 2 Replenishment

Type: 3 Trigger by Schedule

Screen ID: G1640103

Raise Event: Once for All Records

Group Records By:

Description: ReplenishmentNotification

TRIGGER CONDITIONS SUBSCRIBERS SCHEDULES

CREATE SUBSCRIBER

- 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 it to entail.

The screenshot shows the 'Email Templates' 'New Record' form. The 'Description' field is highlighted with a red box and a yellow '1'. The 'From', 'To', 'CC', 'BCC', and 'Subject' fields are grouped with a red box and a yellow '2'. The large 'MESSAGE' text area is highlighted with a red box and a yellow '3'.

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

The screenshot shows the 'SCHEDULES' tab in the business event configuration. The 'SCHEDULES' tab is highlighted with a red box and a yellow '1'. The 'CREATE SCHEDULE' button is highlighted with a red box and a yellow '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.

The screenshot shows the 'Automation Schedule' configuration form. The 'Description' field is highlighted with a red box and a yellow '1'. The 'SCHEDULE TYPE' section is highlighted with a red box and a yellow '2'. The 'SCHEDULE DETAILS' section is highlighted with a red box and a yellow '3'. The 'EXECUTION TIME' section is highlighted with a red box and a yellow '4'.

- h. Your Business event is ready to use.

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