

## Dashboard Guide



# Linked Systems 2015 – Dashboard Guide

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## Overview of Dashboards

Salesperson and Accounting Dashboards are included with your Workstation licenses (per user) of Linked Systems 2015.

### 1. SALESPERSON DASHBOARDS

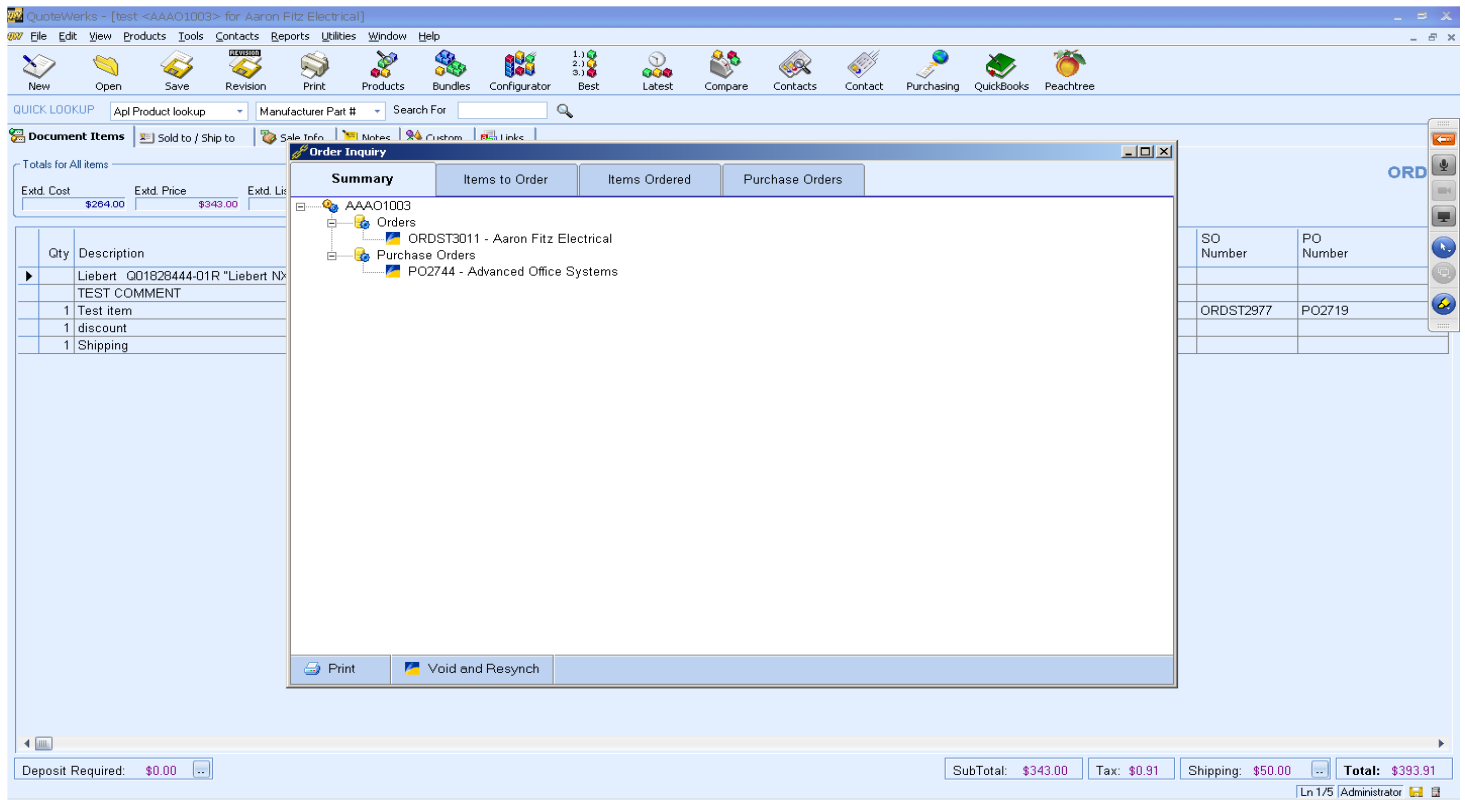
- a. **Sales “*Order Inquiry*” dashboard** – Smaller dashboard just shows information about a one particular GP order or GP purchase order. Users can find their order by many search criteria including quotewerks docno, gp order #, gp invoice #, customer po number, etc.. This is designed to give quick order information to a salesperson in Quotewerks.
- b. **Sales “*Lookup*” Dashboard** – A larger dashboard which allows the user to lookup customer, order, item and purchase order information from GP within Quotewerks (or anyplace else). The user can then drill down to see everything there is to know about that customer, order, item or purchase order.
- c. **Sales “*Snapshot*” Dashboard** – Smaller dashboard which shows a snapshot of relevant warnings for that user, the current user’s orders/quotes in quotewerks, the current users’s orders/purchase orders in progress in MS Dynamics GP and completed orders/purchase orders/invoices. This is designed to give the salesperson a quick snapshot of their work.

### 2. ACCOUNTING DASHBOARDS

- a. **Accounting Dashboard** – Accounting staff can keep organized with automatic lists of items to order, orders processed, orders/work in process and any warnings the accounting staff should be aware of. Accounting staff can perform maintenance that is tedious in gp like deleting/voiding and resynching orders, unlinking purchase orders from sales orders, deleting purchase orders and sales orders, changing vendors on purchase orders, ordering items that still need to be ordered, etc.

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## SALES “ORDER INQUIRY” DASHBOARD - Features



Salesperson can do order inquiries from Quoteworks or a windows/citrix shortcut.

### 1) FEATURES AVAILABLE NOW :

- UNIVERSAL SEARCH** : Search by quoteworks and/or Great Plains data at same time. User can search for order by quoteworks quote #, great plains order #, great plains invoice #, customer po #, customer name, etc.
- TABS SHOWING INFO** : Standard tabs include Summary (shows quoteworks quote # and GP order/po #'s), items to order (any items that were marked “purchase later” on original synch), items ordered (all items ordered on po's), purchase orders (a list of GP purchase orders that have been created). Ship Dates from GP/QW and all available info in GP/QW can be shown on these tabs.
- BUTTONS AVAILABLE NOW** : Print, Delete and Resynch,

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## SALES “ORDER INQUIRY” DASHBOARD (continued)

### 2) FEATURES PLANNED FOR NEAR FUTURE :

- a) “Order Detail button” to show all details on the sales order(s)
- b) “PO Detail” button to show all details on the purchase orders
- c) “Void and Resynch” button (an alternative to already available “Delete and Resynch” button)
- d) On Items to Order Tab : “Create Purchase order” button (for items remaining to order) and “Edit Item” button (to allow the user to change the details of what needs to be ordered/and change details on customer order)
- e) On Items Tab : “Add Item” button, “Delete Item” button, “Change Qty” button, “Change vendor” button
- f) On Purchase Orders Tab : “Update Purchase Order” button (to allow users to change notes and some item info on existing purchase orders already created)

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## SALES “INQUIRY” DASHBOARD – Screen Shots

**Order Inquiry**

Summary | Items to Order | Items Ordered | Purchase Orders

- AAAO1003
  - Orders
    - ORDST2829 - Adam Park Resort
  - Purchase Orders
    - PO2555H4777 - Associated Insurance Inc.
    - PO2556H47F77 - Advanced Office Systems

Print | Delete and Resynch

**Order Inquiry**

Summary | **Items to Order** | Items Ordered | Purchase Orders

SELECT	QUOTE NUMBER	STATUS	ITEM NUMBER	DESCRIPTION
<input type="checkbox"/>	AAAO1004	po not created in gp, not ordered from vendor	32X IDESGH9A	Test item

Create PO in GP | Print | Excel | Open in QW | Order Detail

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## SALES “INQUIRY” DASHBOARD – Screen Shots

**Order Inquiry**

Summary   Items to Order   **Items Ordered**   Purchase Orders

Item Number	Description	Quantity	PO Number	PO Type
▶ NEW PART NUMBER4	Test item monitor	1	PO2926	DROP S
REBATE	Rebate	1	PO2927	DROP S

Print Purchase Order   + Add Item   - Delete Item   Change Qty   Change Vendor

**Order Inquiry**

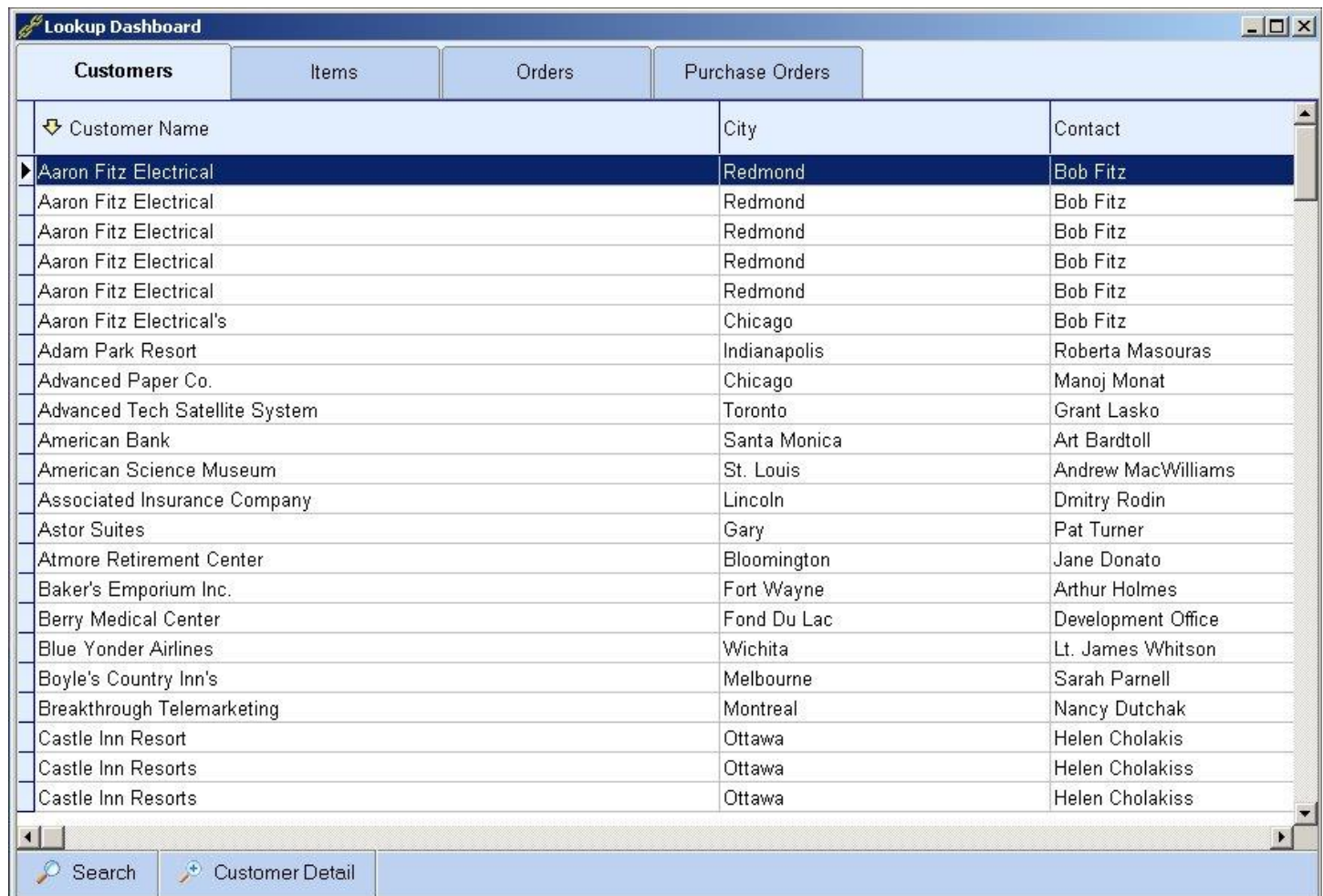
Summary   Items to Order   Items Ordered   **Purchase Orders**

PO Number	Vendor ID	Vendor Name	Date
▶ PO2555H4777	ASSOCIAT0001	Associated Insurance Inc.	2/12/2013 12:20:13 PM
PO2556H47F77	ADVANCED0001	Advanced Office Systems	2/12/2013 12:20:13 PM

Print

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## SALES “LOOKUP” DASHBOARD



Customer Name	City	Contact
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical's	Chicago	Bob Fitz
Adam Park Resort	Indianapolis	Roberta Masouras
Advanced Paper Co.	Chicago	Manoj Monat
Advanced Tech Satellite System	Toronto	Grant Lasko
American Bank	Santa Monica	Art Bardtoll
American Science Museum	St. Louis	Andrew MacWilliams
Associated Insurance Company	Lincoln	Dmitry Rodin
Astor Suites	Gary	Pat Turner
Atmore Retirement Center	Bloomington	Jane Donato
Baker's Emporium Inc.	Fort Wayne	Arthur Holmes
Berry Medical Center	Fond Du Lac	Development Office
Blue Yonder Airlines	Wichita	Lt. James Whitson
Boyle's Country Inn's	Melbourne	Sarah Parnell
Breakthrough Telemarketing	Montreal	Nancy Dutchak
Castle Inn Resort	Ottawa	Helen Cholakiss
Castle Inn Resorts	Ottawa	Helen Cholakiss
Castle Inn Resorts	Ottawa	Helen Cholakiss

A larger dashboard which allows the user to lookup customer, order, item and purchase order information from GP within Quotewerks (or anyplace else). The user can then drill down to see everything there is to know about that customer, order, item or purchase order.

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## SALES “LOOKUP” DASHBOARD (continued)

### 1) FEATURES AVAILABLE NOW :

- a) **CUSTOMER INFO** – Initially shows a customer list with all data from the GP customer card. The user can then drill down to see everything there is to know about this customer including sales summary info, address info, receivables info, a history of what they bought, a list of current customer orders and closed customer orders, customer notes and shipment history.
- b) **ITEM INFO** : Initially shows an item list with all data from the GP item card. The user can then drill down to see everything there is to know about this item including pricing, sales history, quantities by location including availability.
- c) **ORDER INFO** : Initially shows an open and closed order list with all data from the GP Sales order. The user can then drill down to see everything there is to know about this sales order including items on order, billto/shipto info, dates including shipping dates, basic order details, order notes, user defined info and
- d) **BUTTONS AVAILABLE NOW** : Print Order/Purchase Order

### 2) FEATURES PLANNED FOR NEAR FUTURE :

- a) **PURCHASE ORDER INFO** – Including drill down detail showing items on the purchase order, shipping info including dates, detailed info on the vendor where purchased including easy contact info, notes on the GP purchase order and original notes from the quotewerks doc (where available).



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## SALES “LOOKUP” DASHBOARD – Screen Shots

Lookup Dashboard		
Customers	Items	Orders
Customer Name	City	Contact
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical	Redmond	Bob Fitz
Aaron Fitz Electrical's	Chicago	Bob Fitz
Adam Park Resort	Indianapolis	Roberta Masouras
Advanced Paper Co.	Chicago	Manoj Monat
Advanced Tech Satellite System	Toronto	Grant Lasko
American Bank	Santa Monica	Art Bardtoll
American Science Museum	St. Louis	Andrew MacWilliams
Associated Insurance Company	Lincoln	Dmitry Rodin
Astor Suites	Gary	Pat Turner
Atmore Retirement Center	Bloomington	Jane Donato
Baker's Emporium Inc.	Fort Wayne	Arthur Holmes
Berry Medical Center	Fond Du Lac	Development Office
Blue Yonder Airlines	Wichita	Lt. James Whitson
Boyle's Country Inn's	Melbourne	Sarah Parnell
Breakthrough Telemarketing	Montreal	Nancy Dutchak
Castle Inn Resort	Ottawa	Helen Cholakiss
Castle Inn Resorts	Ottawa	Helen Cholakiss
Castle Inn Resorts	Ottawa	Helen Cholakiss

Central Distributing

Sales Totals

Addresses

Receivables

History

Notes

Orders

Shipments

Credit Cards

Sales History

Year To Date

Sales

\$30,831.60

Profit

\$35,630.74

Last Year

Sales

\$0.00

Profit

\$0.00

Lifetime to Date

Sales

\$30,831.60

Profit

\$35,630.74

Order History

Number of Invoices

# Invoices Year To Date

8

# Invoices Last Year

0

Order Dates

First Invoice Date

5/31/2013

Last Transaction Date

9/6/2018

Territory/Salesperson

Salesperson ID

SANDRA M.

Territory ID

TERRITORY 4

Sales History for this Customer

Period

Year

Month/Year

# of Invoices

Profit

Margin

Gross Sales

Costs

Finance Charge

9

2018

1

\$1,313.88

\$100.00

1

2014

0

(\$9,759.24)

(\$4,899.14)

12

2013

1

\$14,549.36

\$0.00

11

2013

1

\$8,145.97

\$0.00

10

2013

1

\$5,675.74

\$0.00

9

2013

1

\$3,809.57

\$0.00

8

2013

1

\$1,150.32

\$0.00

7

2013

1

\$2,848.50

\$0.00

5

2013

1

\$3,097.50

\$0.00

Search

Columns

Print

# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Central Distributing

Sales Totals **Addresses** Receivables History Notes Orders Shipments Credit Cards

**Primary Address**

Address Code	PRIMARY
Address1	Suite 13
Address2	2345 Westwood Dr.
City, State Zip	La Crosse, WI 54601-9975
Phone	(608) 555-0121
Fax	(608) 555-0121

**Billto Address**

Address Code	PRIMARY
Address1	Suite 13
Address2	2345 Westwood Dr.
City, State Zip	La Crosse, WI 54601-9975
Phone	(608) 555-0121
Fax	(608) 555-0121

**All Addresses for this Customer**

Address ID	Address 1	Address 2	Contact Person	City	
PRIMARY	Suite 13	2345 Westwood Dr.	Donald Fox	La Crosse	WI
WAREHOUSE	727 25 St. N		Jason Paul	La Crosse	WI

Search Columns Print Add Address Edit Address Delete Address

Central Distributing

Sales Totals Addresses **Receivables** History Notes Orders Shipments Credit Cards

**Terms**

<b>Payment Terms</b>	
Credit Terms	Net 30
Credit Limit	40000
<b>Payment History</b>	
Last Payment	1/20/2014 - \$4,959.89
Average Days to Pay	181
<b>Invoice History</b>	
First Invoice Date	5/31/2013
Last Transaction	9/6/2018 - \$1,405.87

**Balances**

Current	\$1,405.87
<b>Overdue</b>	
31 - 60 Days:	\$0.00
61 - 90 Days:	\$0.00
91 - 120 Days:	\$0.00
121 - 150 Days:	\$0.00
151 - 180 Days:	\$0.00
Over 999 Days:	\$19,914.66
<b>Total Balance</b>	\$21,320.53

**Open Invoices**

Type	Date	Due Date	Terms	Age	Salesperson	Voided?	Discount Date	Discount Avail
Sales / Invoices	9/6/2018	10/6/2018	Net 30	-3226	SANDRA M.	No	9/6/2018	
Sales / Invoices	10/13/2013	11/12/2013	Net 30	-1437	SANDRA M.	No	10/13/2013	
Sales / Invoices	11/25/2013	12/25/2013	Net 30	-1480	SANDRA M.	No	11/25/2013	
Sales / Invoices	12/13/2013	1/12/2014	Net 30	-1498	SANDRA M.	No	12/13/2013	

**Closed Invoices**

Invoice #	Type	Date	Amount	Due Date	Balance	Age
CM13333	Credit Memos	1/26/2014	\$0.00	1/26/2014	\$0.00	-4166
CM13334	Credit Memos	1/26/2014	\$0.00	1/26/2014	\$0.00	-4166
PMT13032	Payments	1/20/2014	\$4,959.89	1/1/1900	\$0.00	-4165
PMT3020.1	Payments	7/2/2013	\$3,252.38	1/1/1900	\$0.00	-4145

Search Columns Print

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## SALES “LOOKUP” DASHBOARD – Screen Shots

Central Distributing

Sales Totals   Addresses   Receivables   **History**   Notes   Orders   Shipments   Credit Cards

What they Buy

Description	Item Number	Last Order Date	Avg Price	Last Price
2-A3284A, A0409175	5-CONTRACTS	10/7/2009		0
21" Monitor	M2100	10/10/2017		2185
32 meg SDRAM	32 SDRAM	9/8/2009		999.95
333 Processor	333PROC	9/8/2009		49.95
4 GB FWD SCSI-2Disk Drive	4-A3351A	9/8/2009		239.95
4.5 gig Hard Drive	4.5HD	9/8/2009		1700
400 Processor	400PROC	9/8/2009		189.95
40x CD-ROM	40X IDE	9/8/2009		399.95
450 Processor	450PROC	9/8/2009		39.95
				569.95

Orders/Invoices for this item

Order #	Date	Quantity	Unit Price	Extended Price	Item Number	Description
ORDST2270	10/7/2009	1	0	0		
ORDST2271	10/7/2009	1	-10	-10		

Search   Show Order Detail   Columns   Print

Central Distributing

Sales Totals   Addresses   Receivables   History   **Notes**   Orders   Shipments   Credit Cards

Customer Notes

Edit   Save   Cancel



# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Central Distributing

Sales Totals Addresses Receivables History Notes **Orders** Shipments Credit Cards

**Open Orders**

Order Number	Doc ID	Date	Invoice Date	Location Code	Batch Number	Customer Number	Customer
ORDST2230	STDORD	8/17/2009		WAREHOUSE		CENTRALD0001	Central Dis
ORDST2231	STDORD	8/17/2009		WAREHOUSE	AUG31	CENTRALD0001	Central Dis
ORDST2232	STDORD	8/17/2009		WAREHOUSE	FULORD	CENTRALD0001	Central Dis
ORDST2233	STDORD	8/17/2009		WAREHOUSE	ORDERS4/12	CENTRALD0001	Central Dis
ORDST2236	STDORD	8/18/2009		WAREHOUSE	AUG31	CENTRALD0001	Central Dis
ORDST2235	STDORD	8/28/2009		WAREHOUSE	CONTRACTS	CENTRALD0001	Central Dis
ORDST2263	STDORD	9/8/2009		WAREHOUSE	SOP ORDERS	CENTRALD0001	Central Dis
ORDST2261	STDORD	9/8/2009		WAREHOUSE	SOP ORDERS	CENTRALD0001	Central Dis
ORDST2262	STDORD	9/8/2009		WAREHOUSE	SOP ORDERS	CENTRALD0001	Central Dis
ORDST2264	STDORD	9/8/2009		WAREHOUSE	SOP ORDERS	CENTRALD0001	Central Dis
ORDST2265	STDORD	9/8/2009		WAREHOUSE	SOP ORDERS	CENTRALD0001	Central Dis
ORDST2249	STDORD	9/8/2009		WAREHOUSE	SOP ORDERS	CENTRALD0001	Central Dis

**Closed Orders**

Order Number	Doc ID	Date	Invoice Date	Location Code	Batch Number	Customer Number	Customer
INVS3001	SERVINV	9/6/2018	9/6/2018	WAREHOUSE	SERVICE	CENTRALD0001	Central Dis

Search Open Orders Search Closed Orders Columns Print Edit Order

Central Distributing

Sales Totals Addresses Receivables History Notes Orders **Shipments** Credit Cards

**Orders Not Shipped or Partially Shipped**

Order Number	Doc ID	Date	Invoice Date	Customer Number	Requested Ship Date	Fulfilment Date	SC
ORDST2259	STDORD	9/8/2009	1/1/1900	CENTRALD0001	9/8/2009	9/8/2009	
ORDST2260	STDORD	9/8/2009	1/1/1900	CENTRALD0001	9/8/2009	9/8/2009	
ORDST2230	STDORD	8/17/2009	1/1/1900	CENTRALD0001	8/17/2009	8/17/2009	
ORDST2231	STDORD	8/17/2009	1/1/1900	CENTRALD0001	8/17/2009	8/17/2009	
ORDST2261	STDORD	9/8/2009	1/1/1900	CENTRALD0001	9/8/2009	9/8/2009	
ORDST2262	STDORD	9/8/2009	1/1/1900	CENTRALD0001	9/8/2009	9/8/2009	
ORDST2232	STDORD	8/17/2009	1/1/1900	CENTRALD0001	8/17/2009	8/17/2009	
ORDST2233	STDORD	8/17/2009	1/1/1900	CENTRALD0001	8/17/2009	8/17/2009	
ORDST2236	STDORD	8/18/2009	1/1/1900	CENTRALD0001	8/18/2009	8/18/2009	
ORDST2235	STDORD	8/28/2009	1/1/1900	CENTRALD0001	8/28/2009	8/28/2009	
ORDST2263	STDORD	9/8/2009	1/1/1900	CENTRALD0001	9/8/2009	9/8/2009	
ORDST2267	STDORD	9/9/2009	1/1/1900	CENTRALD0001	9/9/2009	9/9/2009	

**Orders Already Shipped**

Order Number	Doc ID	Date	Invoice Date	Customer Number	Requested Ship Date	Fulfilment Date	SC
INVS3025	SERVINV	10/10/2017	10/10/2017	CENTRALD0001	9/30/2018	9/30/2018	
INVS3001	SERVINV	9/6/2018	9/6/2018	CENTRALD0001	9/6/2018	9/6/2018	

Search Columns Print

# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Lookup Dashboard					
Customers		Items	Orders	Purchase Orders	
Item Number	Description	Item Short Name	Standard Cost	User Category	
*DEPOSIT	Test for Eagle		\$0.00		
*FEE	All lines fee		\$0.00		
/C	Comment		\$0.00		
1-A3261A	Multi-Core Processor	Processor	\$17,000.00		
1-A3483A	SIMM EDO 72	SIMM	\$7,000.00		
100XLG	Green Phone	Phone	\$55.50		
100XLG10	test	test	\$0.00		
100XLG107	Lab stimulant used on rats and humans	Lab stimulant	\$0.00	Attractive	
100XLG10aa	test	test	\$0.00	ABC Sterec	
100XLG10ab	Lab stimulant used on rats and humans	Lab stimulant	\$0.00	ABC Sterec	
100XLG10FG	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10FH	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10jij	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10KLE	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10KLEF	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10KLEFG	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10KLEFGH	Lab stimulant used on rats and humans	Lab stimulant	\$0.00		
100XLG10KLEFGLL	new Synnex item	new Synnex ite	\$475.00		
100XLG10KLEFGLLFAH	New Compute (test comment item)jkjafkdsjaklfjdslk	New Compute (t	\$0.00		
100XLG10KLEFGLLNEW	new Synnex item	new Synnex ite	\$0.00		
100XLG10YY	Lab stimulant used on rats and humans	Lab stimulant	\$0.00	Attractive	
100XLG2	test	test	\$0.00		

PHON-ATT-53WH - Cordless-Attractive 5352-White

SummaryQuantitiesPricing

Sales History

Year To Date	
Amount Sold	\$7,218.10
Quantity Sold	38
Profit Margin	
Last Year	
Amount Sold	\$0.00
Quantity Sold	0
Profit	

Item Information

Description	
Item Type	Finished Good
Short Description	Attr. 5352-Whit
Generic Description	Consumer P
Other Info	
Substitute Item #1	PHON-ATT-5354
Substitute Item #2	PHON-PAN-3848
Shipping Weight	3.00
Class ID	ATT CORD

Sales History for this Item per month

Year	Month	Qty	Sales	Cost
2014	5	0	\$0.00	\$1.34
2014	4	10	\$1,899.50	\$920.77
2016	3	4	\$759.80	\$370.36
2016	2	5	\$949.75	\$457.82
2016	1	9	\$1,709.55	\$833.31
2017	3	1	\$189.95	\$92.59
2017	1	9	\$1,709.55	\$833.31

SearchColumnsPrintPrev ItemNext Item

# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

PHON-ATT-53WH - Cordless-Attractive 5352-White

Summary Quantities Pricing

**Reorder Information**

Last Vendor	
Last Reorder Date	
Last Reorder Qty	0
Vendor Reorder #	
Reorder Level	
Can Backorder?	No

**Qty Available**

Total on Hand	15
Total Allocated	0
Total Available	15
Total Backordered	0
Total on Order	0

**Quantity by Location**

Location	Qty on Hand	Qty Allocated	Qty Available	Qty in Use	Qty in Service	Qty Returned
NORTH	35	0	35	0	0	0
SOUTH	0	0	0	0	0	0
WAREHOUSE	-20	0	-20	0	0	0
WC1	0	0	0	0	0	0
WC2	0	0	0	0	0	0
WC3	0	0	0	0	0	0

Search Columns Print Prev Item Next Item

PHON-ATT-53WH - Cordless-Attractive 5352-White

Summary Quantities Pricing

**Pricing Method**

Method	% Markup - Current Cost
Price Group	
Default Selling U of M	Each
U of M Schedule	PHONE 1-10

**Pricing Summary**

Default Price Level	EXTPRCLVL
List Price	\$189.95
Standard Cost	\$0.00
Current Cost	\$92.59

**Pricing**

U of M	Unit Price	Price Level	To Qty	From Qty	U of M Price	Qty in Base U of M
Each	\$189.95	RETAIL	999999999999	1	100	1
Each	\$99.95	EXTPRCLVL	999999999999	1	0	1
Case	\$929.95	EXTPRCLVL	999999999999	1	0	10
Case	\$1,859.95	RETAIL	999999999999	1	100	10

Search Columns Print Prev Item Next Item



# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Lookup Dashboard				
Customers		Orders		Purchase Orders
Order Number	Order Date	Customer Number	Customer Name	Shipto N
022312A	2/23/2012	TEST		
321456	7/1/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321457	7/1/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321458	7/2/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321459	7/2/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321460	7/3/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321461	7/3/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321464	7/4/2013	AARONFIT0001	Aaron Fitz Electrical	Aaron Fit
321465	7/8/2013	AARONFI	Aaron Fitz Electrical's	Aaron Fit
321466	7/8/2013	FDSAFSDAFDSA	CENTRAL ILLINOIS DISTRIBUTING TEST	CENTRA
321467	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321468	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321469	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321470	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321471	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321472	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321473	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321474	7/8/2013	WAB001 INT	Wabtec All Lines Test Customer	Wabtec /
321475	7/10/2013	AARONFI	Aaron Fitz Electrical's	Aaron Fit
321476	7/11/2013	AARONFI	Aaron Fitz Electrical's	Aaron Fit
321477	7/11/2013	AARONFI	Aaron Fitz Electrical's	Aaron Fit
321478	7/11/2013	INTERNAT0001	International Mailing Corp.	Internatio

Order ORDST2256					
Details	Items	Bill To / Ship To	Holds	Notes	Dates
Customer Info					
CENTRALD0001 / Central Distributing		Bill To	PRIMARY	Ship To	PRIMARY
Order Details					
Trx Type/ID	Order / STDORD	Batch ID	SOP ORDERS	Customer PO #	
Document #	ORDST2256	Site ID	WAREHOUSE	Salesperson	SANDRA M.
Date	9/8/2009	Shipping Method		Comment ID	
Print Delete Order Edit Order					

# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Order ORDST2256

Details Items Bill To / Ship To Holds Notes Dates User Defined Shipping Info

Items Ordered

Item Number	Description	Quantity	Quantity Allocated	Quantity
4.5HD	4.5 gig Hard Drive	1	1	

Total : \$203.25

Print Columns Edit Order

Order ORDST2256

Details Items Bill To / Ship To Holds Notes Dates User Defined Shipping Info

Billto

Customer ID: CENTRALD0001

Billto Address ID: PRIMARY

Name: Central Distributing

Contact: Donald Fox

Address 1: Suite 13

Address 2: 2345 Westwood Dr.

Address 3:

City: La Crosse

State: WI Zip Code: 54601-9975

Country: USA

Phone 1: (608)555-0121 Ext 0000

Phone 2: ( ) - Ext

Phone 3: ( ) - Ext

Fax: (608)555-0121 Ext 0000

Shipto

Shipping Method:

Shipto Address ID: PRIMARY

Name: Central Distributing

Contact: Donald Fox

Address 1: Suite 13

Address 2: 2345 Westwood Dr.

Address 3:

City: La Crosse

State: WI Zip Code: 54601-9975

Country: USA

Phone 1: (608)555-0121 Ext 0000

Phone 2: ( ) - Ext

Phone 3: ( ) - Ext

Fax: (608)555-0121 Ext 0000

Print Edit Order



# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Order ORDST2256

Details Items Bill To / Ship To **Holds** Notes Dates User Defined Shipping Info

**Assigned Holds**

Assigned Holds	User	Date	Time
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**Removed Holds**

Removed Holds	User ID	Date	Time
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Columns Edit Order

Order ORDST2256

Details Items Bill To / Ship To Holds **Notes** Dates User Defined Shipping Info

**Comments**

**Notes**

# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Order ORDST2256

Details Items Bill To / Ship To Holds Notes **Dates** User Defined Shipping Info

**Dates that can be changed**

Quote Date	<input type="text"/>	Back Order Date	<input type="text"/>
Quote Exp Date	<input type="text"/>	Return Date	<input type="text"/>
Req Ship Date	<input type="text" value="9/8/2009"/>		

**Dates that CANNOT be changed**

Posting Date	<input type="text" value="-"/>	Invoice Date	<input type="text" value="-"/>
Date Fulfilled	<input type="text" value="9/8/2009"/>	Order Date	<input type="text" value="-"/>
Actual Ship Date	<input type="text" value="9/8/2009"/>		

Print Edit Order

Order ORDST2256

Details Items Bill To / Ship To Holds Notes Dates **User Defined** Shipping Info

**User Defined Fields**

Document Origin	<input type="text"/>	Priority	<input type="text"/>
User Table 2	<input type="text"/>	Confirmation	<input type="text"/>
User Table 3	<input type="text"/>	Ordered by	<input type="text"/>
Quote Sent Date	<input type="text"/>	User Defined 4	<input type="text"/>
User Date 2	<input type="text"/>	User Defined 5	<input type="text"/>

Print Edit Order

# Linked Systems 2015 – Dashboard Guide

## SALES “LOOKUP” DASHBOARD – Screen Shots

Order ORDST2256

Details Items Bill To / Ship To Holds Notes Dates User Defined **Shipping Info**

**Tracking Numbers**

Print Delete Order Edit Order Copy to Clipboard

Lookup Dashboard			
Customers	Items	Orders	Purchase Orders
PO Number	Doc Date	Vendor	Company
AAAO1003_17AAA	5/1/2012	Trey Research	Central Illinois Distributing
AAAO1003_17AAB	5/1/2012	Trey Research	Central Illinois Distributing
AAAO1003_17AAC	5/1/2012	Trey Research	Central Illinois Distributing
AAAO1003_17AAD	5/1/2012	Trey Research	Central Illinois Distributing
AAAO10037	4/13/2012	Trey Research	S & S Properties
AAAO1003A	1/11/2012	Signature Systems	
AAAO1003A33223	4/19/2013	Associated Insurance Inc.	Aaron Fitz Electrical
AAAO1003A333	4/19/2013	Advanced Office Systems	Aaron Fitz Electrical
AAAO1003A33333	4/19/2013	Associated Insurance Inc.	Aaron Fitz Electrical
AAAO1003A434	4/19/2013	Advanced Office Systems	Aaron Fitz Electrical
AAAO1003A5677	1/31/2012	Signature Systems	
AAAO1003A88	4/17/2013	Associated Insurance Inc.	Aaron Fitz Electrical
AAAO1003A888	4/19/2013	Advanced Office Systems	Aaron Fitz Electrical
AAAO1003A889	4/17/2013	Advanced Office Systems	Aaron Fitz Electrical
AAAO1003A8897	7/26/2013	Synnex	IT WEAPONS INC.
AAAO1003AB	10/26/2012	Signature Systems	American Science Museum
AAAO1003ADSA	4/18/2013	Advanced Office Systems	Aaron Fitz Electrical
AAAO1003AE	1/13/2012	Signature Systems	American Science Museum
AAAO1003AFDSFDS	1/13/2012	Signature Systems	American Science Museum
AAAO1003AHH	7/17/2013	Synnex	IT WEAPONS INC.
AAAO1003AII	7/19/2013	Synnex	IT WEAPONS INC.
AAAO1003AL	7/18/2013	Synnex	IT WEAPONS INC.

Search Unlink PO and SO

# Linked Systems 2015 – Dashboard Guide

## SALES “SNAPSHOT” DASHBOARD – Features

QuoteWerks - [test <AAAO1003> for IT WEAPONS INC.]

File Edit View Products Tools Contacts Reports Utilities Window Help

NEW Open Save Revision Print Products Bundles Configurator Best Latest Compare Contacts Contact Purchasing QuickBooks Peachtree

QUICK LOOKUP Apl Product lookup Manufacturer Part # Search For

Document Items Sold to / Ship to Sale Info Notes Custom Links

Totals for All items

Extd. Cost	Extd. Price	Extd. List	Profit	Profit Margin	Commission
\$528.00	-\$21.00	\$765.00			

GP Item Part # Qty Description

NEW PART NUMBER4	1	Test item mor
SNS	1	Test item mor
REBATE	1	Rebate

**Sales "Snapshot" Dashboard**

- OVERDUE ORDERS**
  - Order #12345 - Forest Company (due 9/2/13)
  - Order #12351 - Microsoft (due 9/1/13)
- ORDERS IN PROCESS**
  - AAAO1003 - Barker Corporation
  - AAAO1005 - Forest company
- OPEN QUOTES**
  - Quote #AAAO1003 - Forest Company
  - Quote #AAAO1005 - Microsoft

Unit Price Ext. Price Unit Cost PO Number SO Number

1.00	\$34.00	\$264.00	AAAO1003B654	321518
1.00	\$45.00	\$264.00		
1.00	-\$100.00	\$0.00		

Open in QW Print

Deposit Required: \$0.00

SubTotal: -\$21.00 Tax: -\$7.00 Shipping: \$0.00

Comment

Smaller dashboard which shows a snapshot of relevant warnings for that user, the current user's orders/quotes in quotewerks, the current users's orders/purchase orders in progress in MS Dynamics GP and completed orders/purchase orders/invoices. This is designed to give the salesperson a quick snapshot of their work.

# Linked Systems 2015 – Dashboard Guide

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## SALES “SNAPSHOT” DASHBOARD - Features

### 1. FEATURES AVAILABLE NOW :

- a. **OVERDUE ORDERS FOLDER** : This section includes the current salesperson's Great Plains orders/invoices that meet the criteria of “late” based on user defined rules using data from Great Plains or Quotewerks. Unfortunately, at this time we cannot access vendor websites or web based oem shipping data. However, If you use the Great Plains Drop ship notification tool, we can compare the actual date with the original requested date. This section can be customized anyway you want (which will require billable time)
- b. **ORDERS IN PROCESS FOLDER** : This section includes the current Salesperson's Great Plains orders/invoices that were synched from Quotewerks into Great Plains and have not been fully shipped yet. This section can be customized anyway you want (which will require billable time)
- c. **OPEN QUOTES FOLDER** : This section includes the current Salesperson's QuoteWerks quotes that have not been won/synched to Great Plains yet. This section can be customized anyway you want (which will require billable time)
- d. **ADDITIONAL SECTIONS** : We can add additional sections as you need (which will require billable time)

### 2. FEATURES PLANNED FOR NEAR FUTURE :

- a. **TABBED INTERFACE** : Several users have requested a more robust way to find their open quotes in Quotewerks (Sort by any field, search by any field, filter by multiple fields, etc). Others have said they like the tabbed interface to look for overdue orders, etc. We are in the process of building this interface.

# Linked Systems 2015 – Dashboard Guide

## SALES “SNAPSHOT” DASHBOARD – Screen shots

QuoteWerks - [test <AAA01003> for IT WEAPONS INC.]

File Edit View Products Tools Contacts Reports Utilities Window Help

New Open Save Revision Print Products Bundles Configurator Best Latest Compare Contacts Contact Purchasing QuickBooks Peachtree

QUICK LOOKUP Apl Product lookup Manufacturer Part # Search For

Document Items Sold to / Ship to Sale Info Notes Custom Links

Totals for All items

Extd. Cost	Extd. Price	Extd. List	Profit	Profit Margin	Commission
\$528.00	-\$21.00	\$765.00			

GP Item Part #	Qty	Description
NEW PART NUMBER4	1	Test item mor
SNS	1	Test item mor
REBATE	1	Rebate

**Sales "Snapshot" Dashboard**

- OVERDUE ORDERS**
  - Order #12345 - Forest Company (due 9/2/13)
  - Order #12351 - Microsoft (due 9/1/13)
- ORDERS IN PROCESS**
  - AAA01003 - Barker Corporation
  - AAA01005 - Forest company
- OPEN QUOTES**
  - Quote #AAA01003 - Forest Company
  - Quote #AAA01005 - Microsoft

Unit Price	Ext. Price	Unit Cost	PO Number	SO Number
.00	\$34.00	\$264.00	AAA01003B654	321518
1.00	\$45.00	\$264.00		
1.00	-\$100.00	\$0.00		

Open in QW Print

Deposit Required: \$0.00

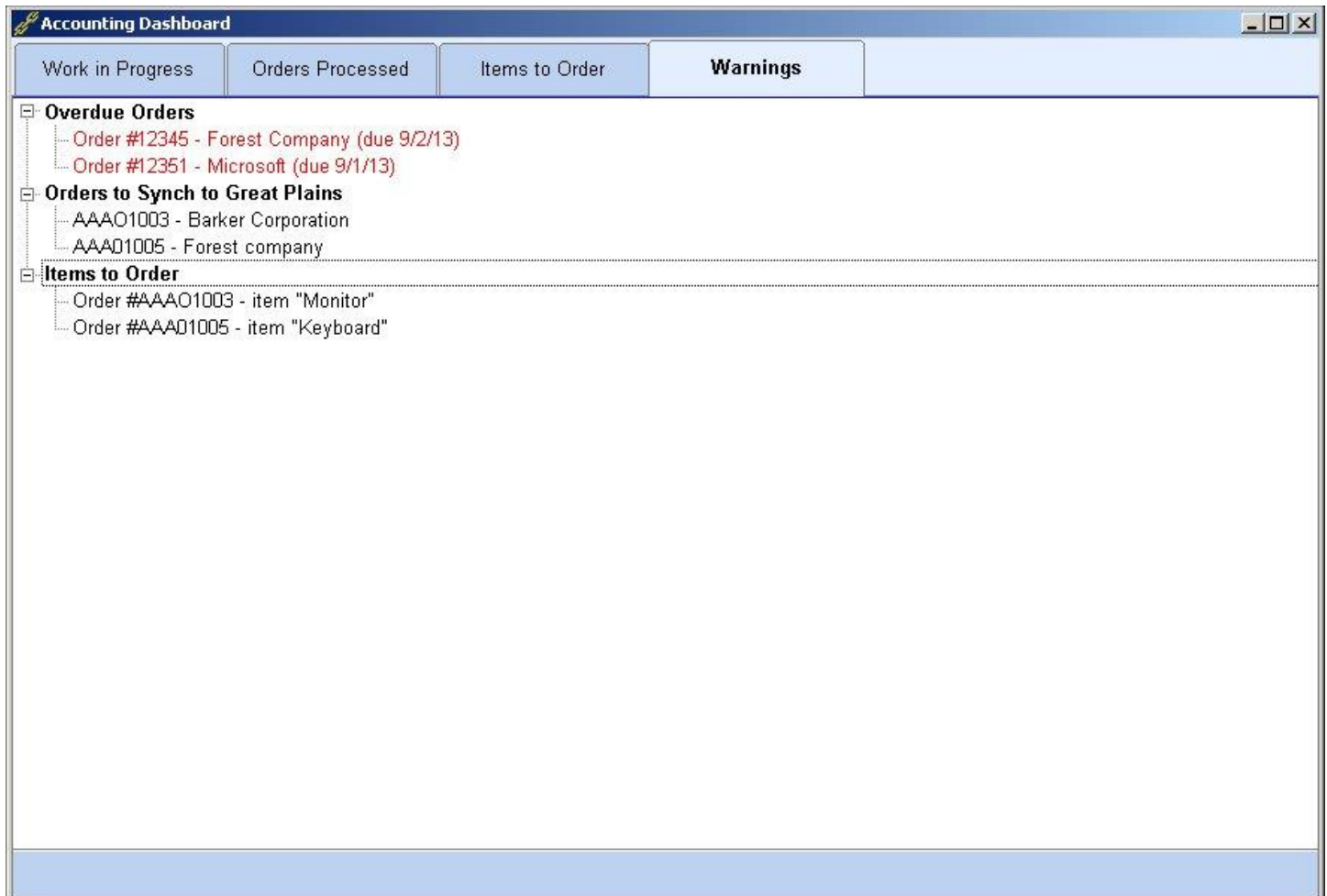
SubTotal: -\$21.00 Tax: -\$7.00 Shipping: \$

Comment

# Linked Systems 2015 – Dashboard Guide

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## ACCOUNTING DASHBOARD - Features



Accounting staff can keep organized with automatic lists of items to order, orders processed, orders/work in process and any warnings the accounting staff should be aware of. Accounting staff can perform maintenance that is tedious in gp like deleting/voiding and resynching orders, unlinking purchase orders from sales orders, deleting purchase orders and sales orders, changing vendors on purchase orders, ordering items that still need to be ordered, etc.



# Linked Systems 2015 – Dashboard Guide

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## ACCOUNTING DASHBOARD

### 1. FEATURES AVAILABLE NOW :

- b. **WORK IN PROGRESS TAB** : Tab shows Quotewerks docs that are either a) ready to be transferred from Quotewerks to Great Plains or b) have been transferred from Quotewerks to Great Plains but are not invoiced yet. From this tab, the user can highlight one or more docs to export to Great Plains, export the list of docs to Excel including their status, open any of these docs in Quotewerks and Delete and Resynch any of these docs that have already been exported to Great Plains.
- c. **ORDERS PROCESSED TAB** : This tab shows transactions that have already been processed either by Transferring from Quotewerks to Great Plains or by manual entry in Great Plains. From this tab, the user can filter the list by any field in Great Plains (order date, ship date, etc), print the order/invoice, export the list to Excel or Open any of these docs in Quotewerks.
- d. **ITEMS TO ORDER TAB** : This tab shows items that were marked as "purchase later" while transferring from quotewerks to Great Plains. This is a todo list showing all of the items for all sales orders that still need to be purchased (that were synched from QW to GP). From this tab, the user can filter the list by any field in Great Plains (order date, ship date, etc), print the order/invoice, export the list to Excel and Open any of these docs in Quotewerks.
- e. **WARNINGS TAB** : This tabs shows user definable warnings for the accounting staff. This may include such warnings as overdue orders, orders ready to synch to Great Plains, items to order, orders that have generated holds during their Export (i.e. for credit holds or address verification). We can add any custom warning you would like using data from Great Plains, Quotewerks or any other SQL database on your system (configuring warnings will require billable time). From this tab, the user can execute context sensitive actions like exporting orders that are ready to synch.

### 2. FEATURES PLANNED FOR NEAR FUTURE

- f. "Order Detail button" to show all details on the sales order(s)
- g. "PO Detail" button to show all details on the purchase orders
- h. "Void and Resynch" button (an alternative to already available "Delete and Resynch" button)
- i. On Items to Order Tab : "Create Purchase order" button (for items remaining to order) and "Edit Item" button (to allow the user to change the details of what needs to be ordered/and change details on customer order)
- j. On Work in Progress Tab : "Add Item" button, "Delete Item" button, "Change Qty" button, "Change vendor" button, "Update Purchase Order" button (to allow users to change notes and some item info on existing purchase orders already created)

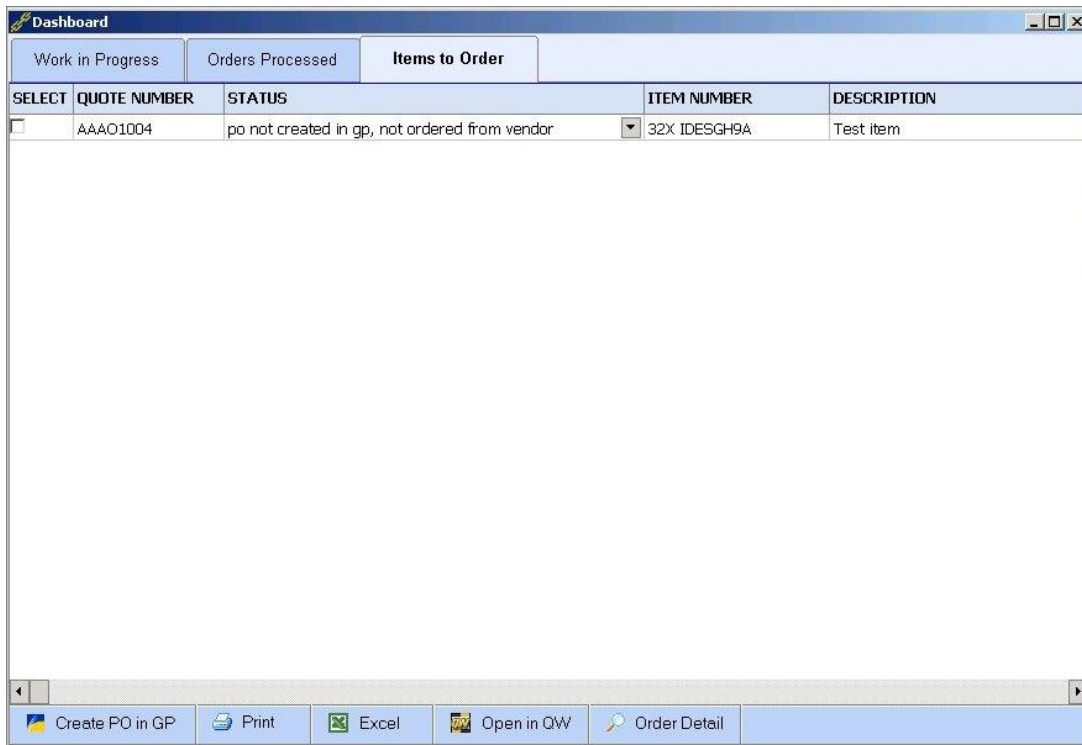


## ACCOUNTING DASHBOARD – Screen Shots

Dashboard					
Work in Progress		Orders Processed	Items to Order		
Quote Number	QW Doc Status	Customer	Order Date	Invoice Date	Inv #
AAA1001	Open	Plant Solutions			
AAAO1001	RT	Effective Solutions			
AAAO1002	RT	American Electrical Contractor			sa
AAAO1003	ALL DOCS	Aaron Fitz Electrical			10
AAAO1004	Won	Eric Siko			
AAAO1005	Won	Crop King			
AAAO12345679	Ready	TEST Central Illinois Distributing TEST			
AAAO12345680	Ready	XYZ Test Company			
AAAO12345681	Order Processed	Teklinks			10
▶ AAAO12345682	ALL DOCS	Adam Park Resort			10
AAAO12345683	Order Processed	Teklinks			
AAAO12345684	Open	Adam Park Resort			10
AAAO12345685	ALL DOCS	Triad			10
AAAO12345686	ALL DOCS	Triad			10
AAAQ1001	Open	Trainer's Advisory Network			
AAAQ1002	Open	Vibration Solutions			
AAAQ1003	Open	Net Surit			
AAAQ1004	Open	Shumaker Industries			
AAAQ1005	Open	Susan Cwiertnia			
AAAQ1006	Open	Tammy Rowlan			
AAAQ1007	Open	Alissa Price			
AAAQ1008	Open	OMT			

# Linked Systems 2015 – Dashboard Guide

## ACCOUNTING DASHBOARD – Screen Shots

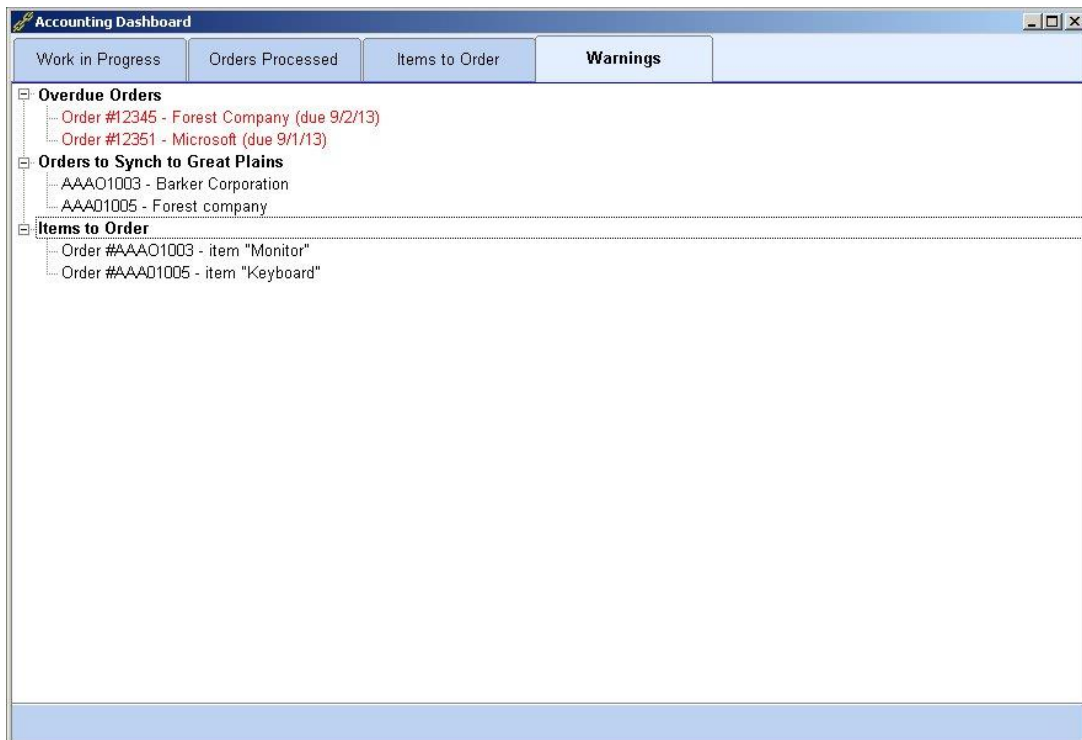


**Dashboard**

Work in Progress | Orders Processed | **Items to Order**

SELECT	QUOTE NUMBER	STATUS	ITEM NUMBER	DESCRIPTION
<input type="checkbox"/>	AAAO1004	po not created in gp, not ordered from vendor	32X IDESGH9A	Test item

Create PO in GP | Print | Excel | Open in QW | Order Detail



**Accounting Dashboard**

Work in Progress | Orders Processed | Items to Order | **Warnings**

- Overdue Orders**
  - Order #12345 - Forest Company (due 9/2/13)
  - Order #12351 - Microsoft (due 9/1/13)
- Orders to Synch to Great Plains**
  - AAAO1003 - Barker Corporation
  - AAAO1005 - Forest company
- Items to Order**
  - Order #AAAO1003 - item "Monitor"
  - Order #AAAO1005 - item "Keyboard"