Dashboard Guide

Microsoft Dynamics™ GP

QUOTE Werks

Connec+Wise
IT's Business Automation

Linked Systems, Inc.

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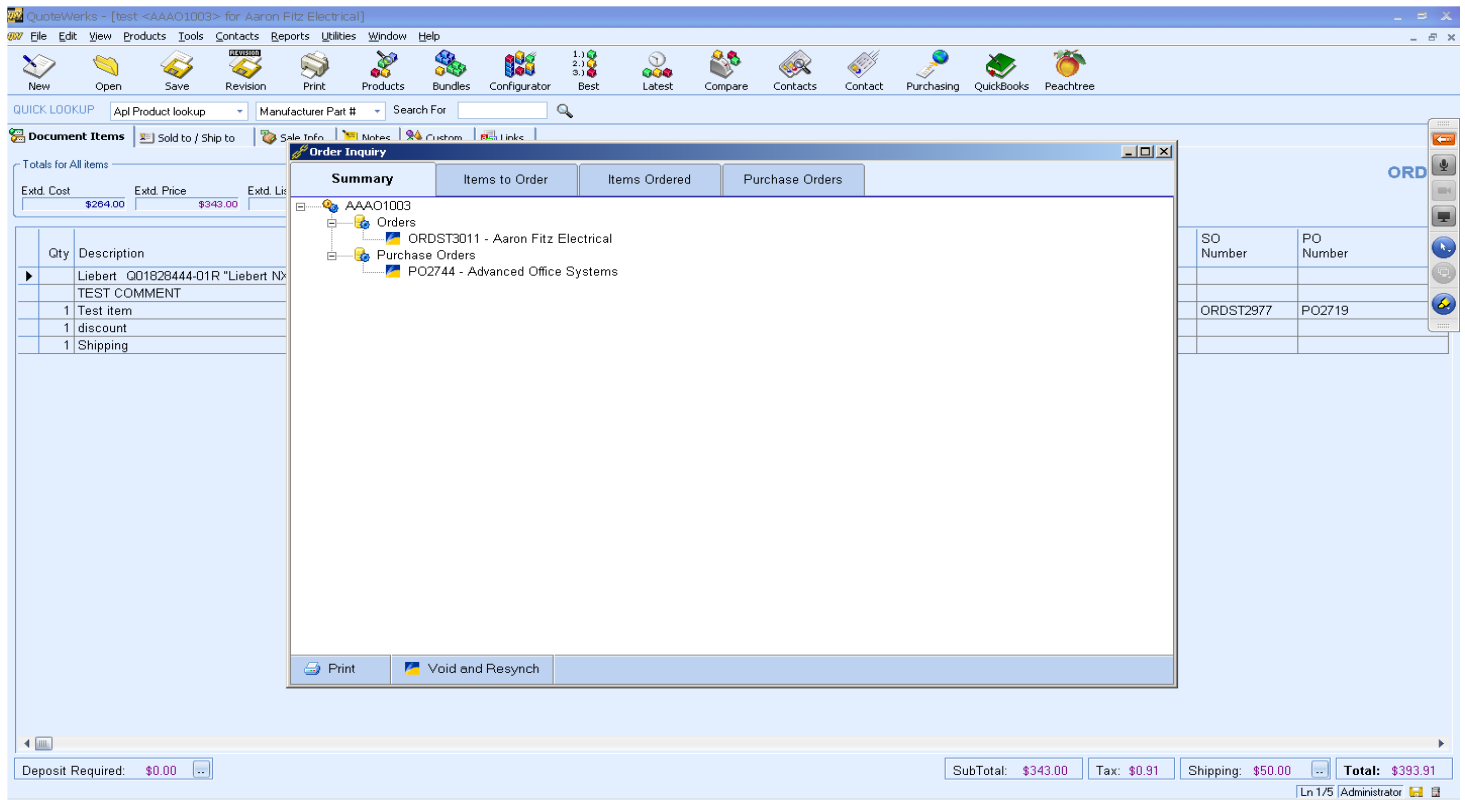
Salesperson can do order inquiries from Quotewerks or a windows/citrix shortcut.

1) **FEATURES AVAILABLE NOW :**

   a) **UNIVERSAL SEARCH** : Search by quotewerks and/or Great Plains data at same time. User can search for order by quotewerks quote #, great plains order #, great plains invoice #, customer po #, customer name, etc.

   b) **TABS SHOWING INFO** : Standard tabs include Summary (shows quotewerks 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.

   c) **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

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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 SI
REBATE	Rebate	1	PO2927	DROP SI

🖨 Print Purchase Order   ➕ Add Item   ➖ Delete Item   🟨 Change Qty   🟨 Change Vendor

Order Inquiry				_ □ ×
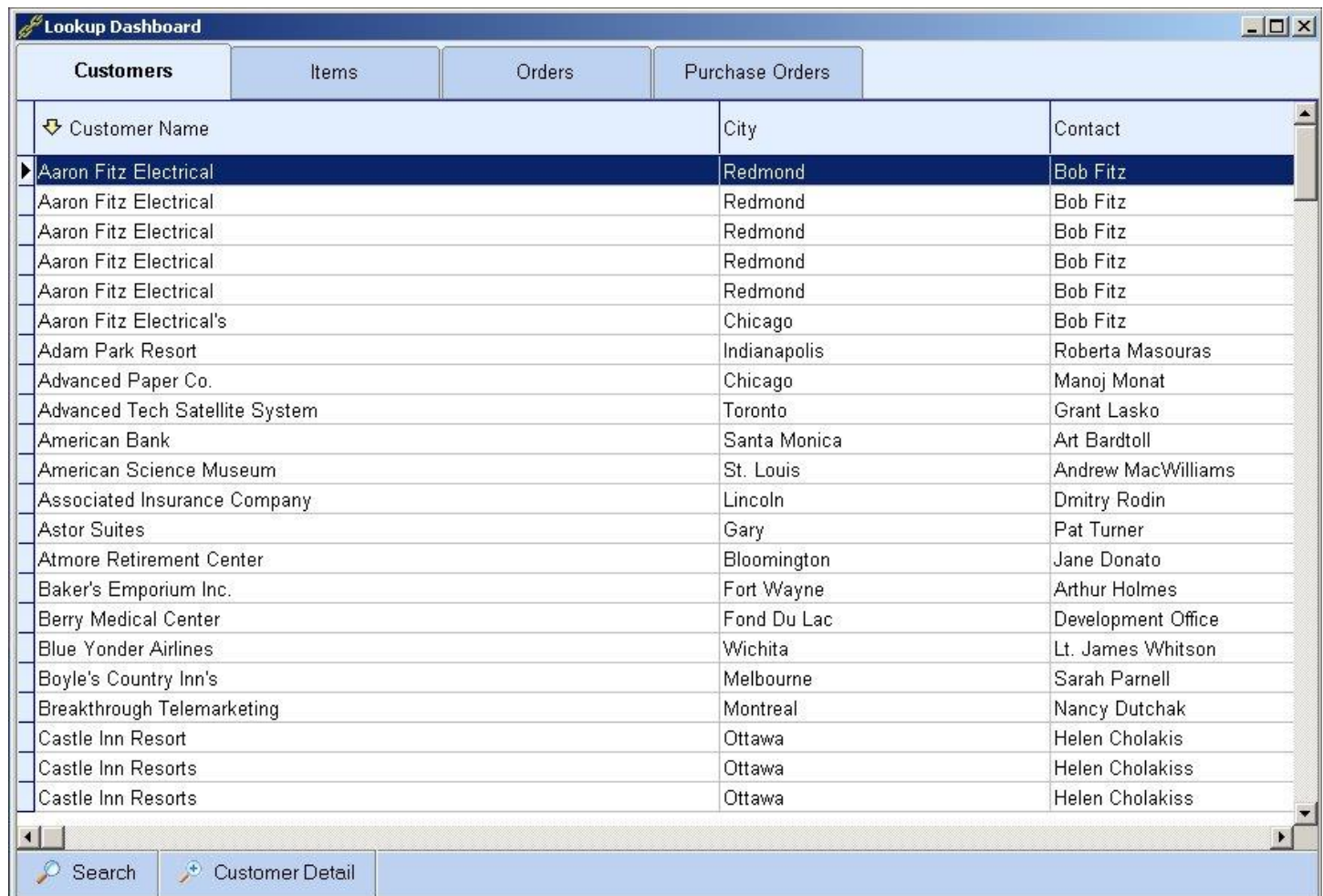
Summary	Items to Order	Items Ordered	**Purchase Orders**	

⬇ 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

Customers	Items	Orders	Purchase 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 Cholakis
Castle Inn Resorts	Ottawa	Helen Cholakiss
Castle Inn Resorts	Ottawa	Helen Cholakiss

🔍 Search   ⚷ Customer Detail

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	Purchase 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
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Berry Medical Center	Fond Du Lac	Development Office
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Breakthrough Telemarketing	Montreal	Nancy Dutchak
Castle Inn Resort	Ottawa	Helen Cholakis
Castle Inn Resorts	Ottawa	Helen Cholakiss
Castle Inn Resorts	Ottawa	Helen Cholakiss

🔍 Search   🔎 Customer Detail

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 Cha
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

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SALES "LOOKUP" DASHBOARD – Screen Shots

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

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SALES "LOOKUP" DASHBOARD – Screen Shots

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SALES "LOOKUP" DASHBOARD – Screen Shots

Lookup Dashboard

Customers	Items	Orders	Purchase Orders

Item Number	Description	Item Short Name	Standard Cost	User Categr
*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 Stered
100XLG10ab	Lab stimulant used on rats and humans	Lab stimulant	$0.00	ABC Stered
100XLG10FG	Lab stimulant used on rats and humans	Lab stimulant	$0.00	
100XLG10FH	Lab stimulant used on rats and humans	Lab stimulant	$0.00	
100XLG10jjj	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)jkjaflkdsjaklfdjslk	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

Summary	Quantities	Pricing

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-Wht
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

Search	Columns	Print	Prev Item	Next Item

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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 Availabile

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

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SALES "LOOKUP" DASHBOARD – Screen Shots

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SALES "LOOKUP" DASHBOARD – Screen Shots

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SALES "SNAPSHOT" DASHBOARD – Features

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.

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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.

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SALES "SNAPSHOT" DASHBOARD – Screen shots

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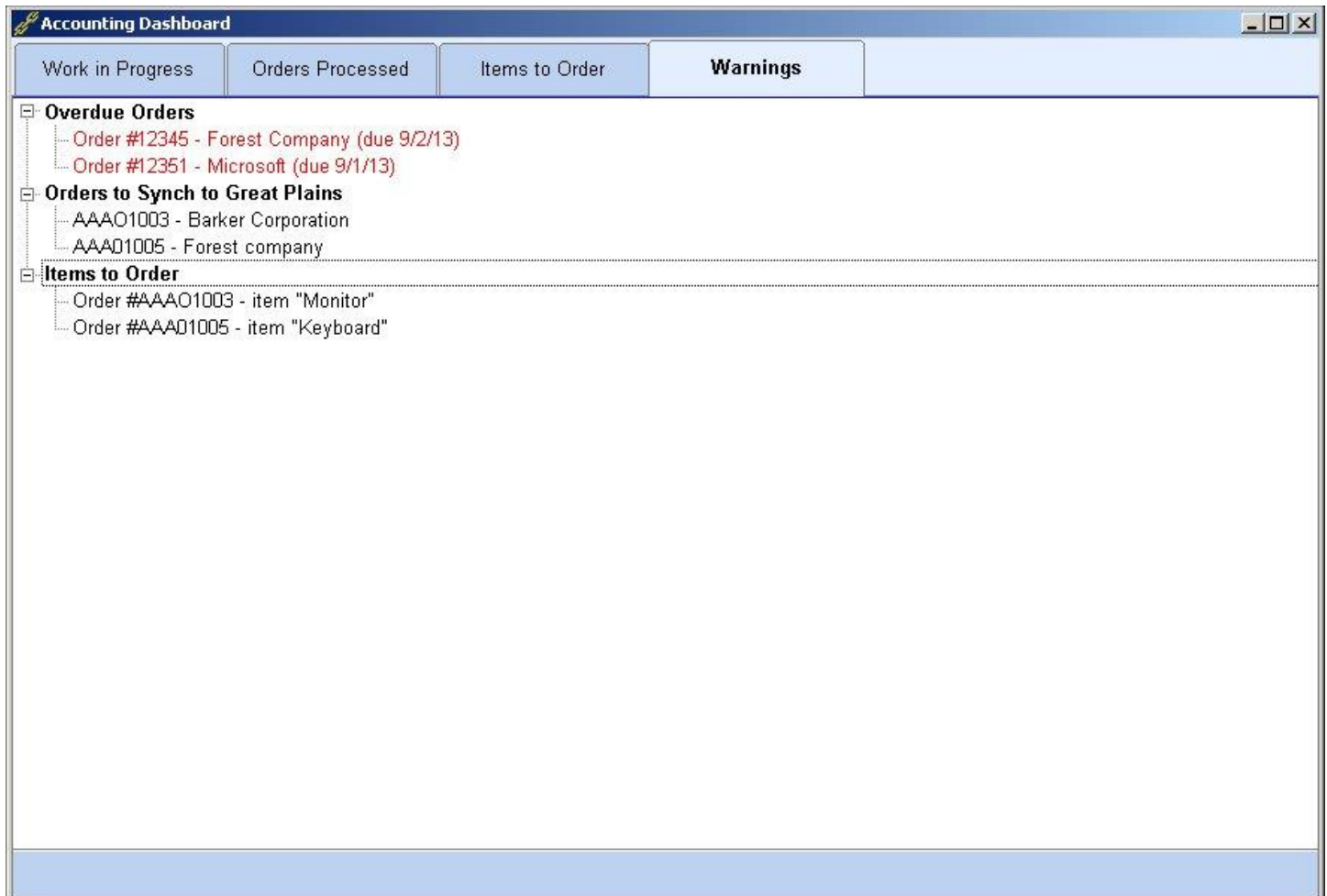
Accounting staff can keep organized with automatic lists of items to order, orders processed, orders/work in process and any warnings the accounting staff should be aware of. Accounting staff can perform maintenance that is tedious in gp like deleting/voiding and resynching orders, unlinking purchase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

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)
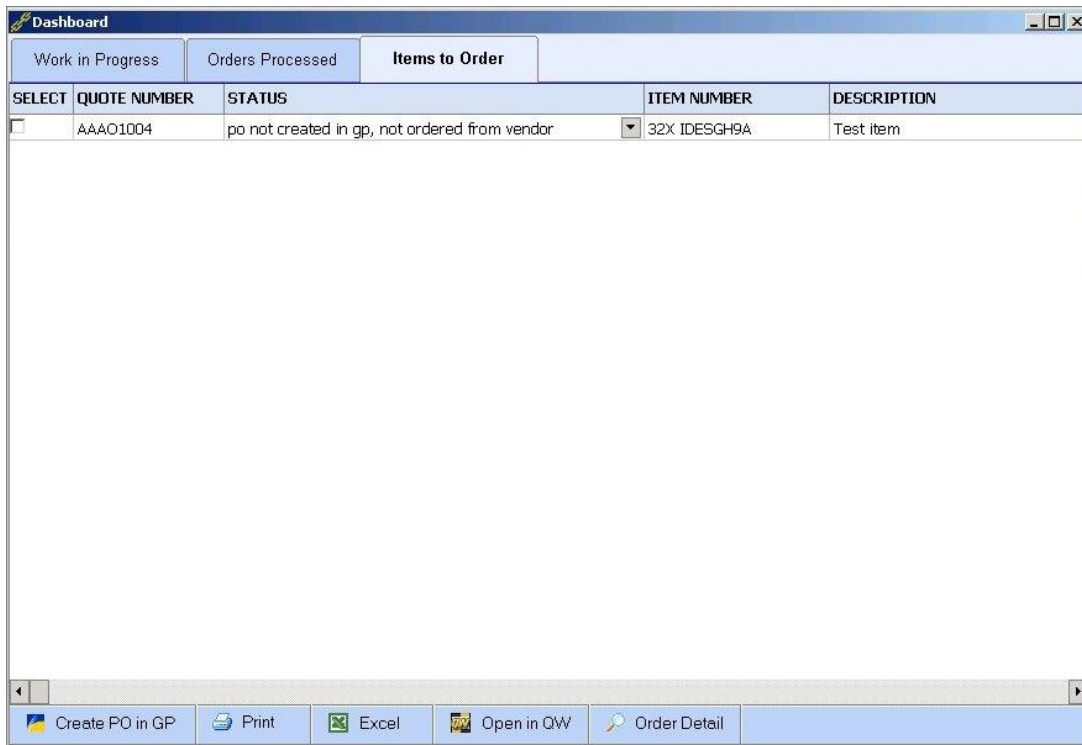
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ACCOUNTING DASHBOARD – Screen Shots

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