



# Propel Your Business: The Power of Analytics in Acumatica

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Demo by Sheila Ochoa

Rockton Connect



# AGENDA

- **About Us** – Get to know the people behind the partnership
- **Acumatica Reporting, Dashboards and Data Analysis Toolkit**
  - **Generic Inquiries**
  - **Advanced Filters & Pivot Tables**
  - **Dashboards**
- **Acumatica Product Demo**
- **Summary & Questions**

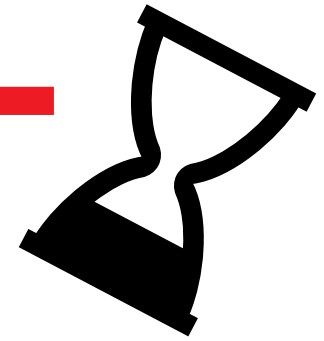


# About Us





**TIME**  
**FOR A**  
**POLL**





# The Cloud ERP

## For resilient business

Built for mobile and telework scenarios and easily integrated with the collaboration tools of your choice, Acumatica delivers flexibility, efficiency, and continuity of operations to growing small and midmarket organizations

**Acumatica Cloud ERP provides the best business management solution for digitally resilient companies**

	Connected business	<b>Delivered</b>
	Rapid integrations	<b>Delivered</b>
	Remote collaboration	<b>Delivered</b>
	Business resilience	<b>Delivered</b>
	Future proof	<b>Delivered</b>



“

Acumatica - the fastest-growing cloud ERP company!

”



# Why Choose Acumatica for Reporting and Business Intelligence?

- ✓ More than data
- ✓ Power to unlock insights
- ✓ Make critical business decisions
- ✓ React to competitive challenges







## **What are the benefits for your business?**

1. Single Version of the Truth
2. Security by Role
3. Multiple Display Options





# Acumatica Reporting



## CUSTOMIZED

Make better, faster and more informed decisions.



## ROLE-BASED

Tailored to meet the information needs of all roles.



## MULTI-DIMENSIONAL

Use Subaccounts with segmented keys to breakdown information.



# Generic Inquiries

Easily extract the data you need and make it available to multiple reporting and analytics applications with Acumatica ERP Generic Inquiries.



```
)u=a|f|(n,r,i),typeof.u=="  
((s[r]?e:i||(i={}))|r|=n[r]  
mimeType||n.getResponseHead  
tion.On(e,t){var.n,r,i,s,o=  
i};if(!n)for(r.in.a){s=r.sp  
'No.conversion.from.'" +u+"."  
n(){return.setTimeout(func  
)}.always(function(){delete  
},f=u.promise({elem:e,prop  
f.opts.specialEasing[t]||f  
.specialEasing));for(;i<o;i  
gress).done(f.opts.done,f.  
n]=s[0]),n!==r&&(e[r]=s,de  
&Gt(e);n.queue||(l=v._queu  
e.nodeType===1&&("height"i  
1)),n.overflow&&(p.overflow  
==(g?"hide":"show"))contin  
how",!0);for(t.in.d)v.styl  
(e,t,n,r,i)}function.Zn(e,  
i=e.document,s=e.location,  
rototype.indexOf,h=Object.  
\xA0]+$/g,w=/^(?:[^\#<]*(<  
,k=/-([\da-z])/gi,L=functi  
nreadystatechange",A),v.re  
ring"){e.charAt(0)=== "<"&&  
(n)&&this.attr.call(e,n,!0  
(e)}return.v.isFunction(e)  
ation/
```



## How can generic inquiries work for you?

1. Extract Specific Data
2. No Coding Knowledge
3. Reused and Modified



# Key Benefits of Generic Inquiries

Access any  
data in  
Acumatica

No coding  
required

Data Security





# Acumatica Dashboards

Create customized dashboards to display essential information by role, department, or individual. View KPIs at a glance, and click on widgets to drill down for more detail.





# Dashboards

## Features and Capabilities



Drag and Drop



Multiple Data Sources



Ease of Use



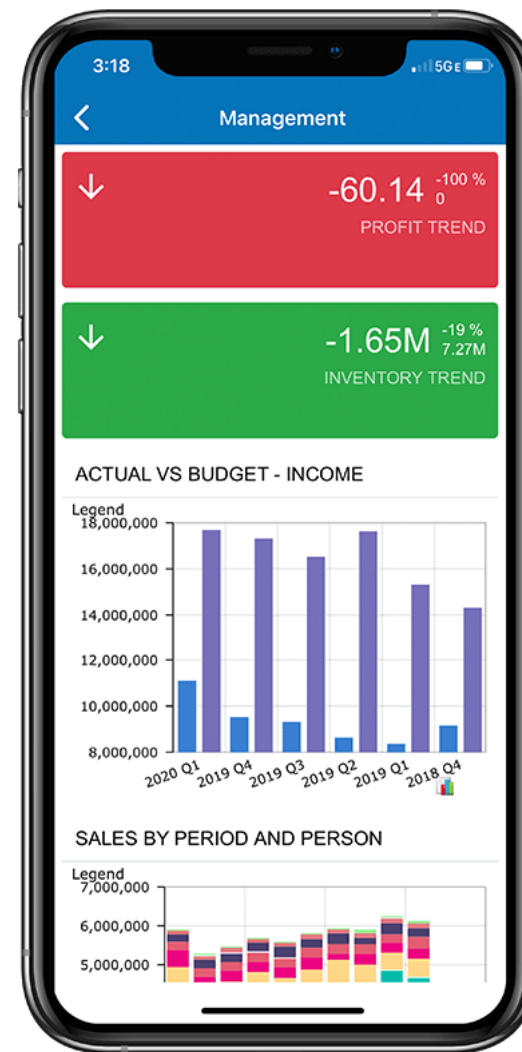
Dashboard Management



Mobile Display



Customer Color Options





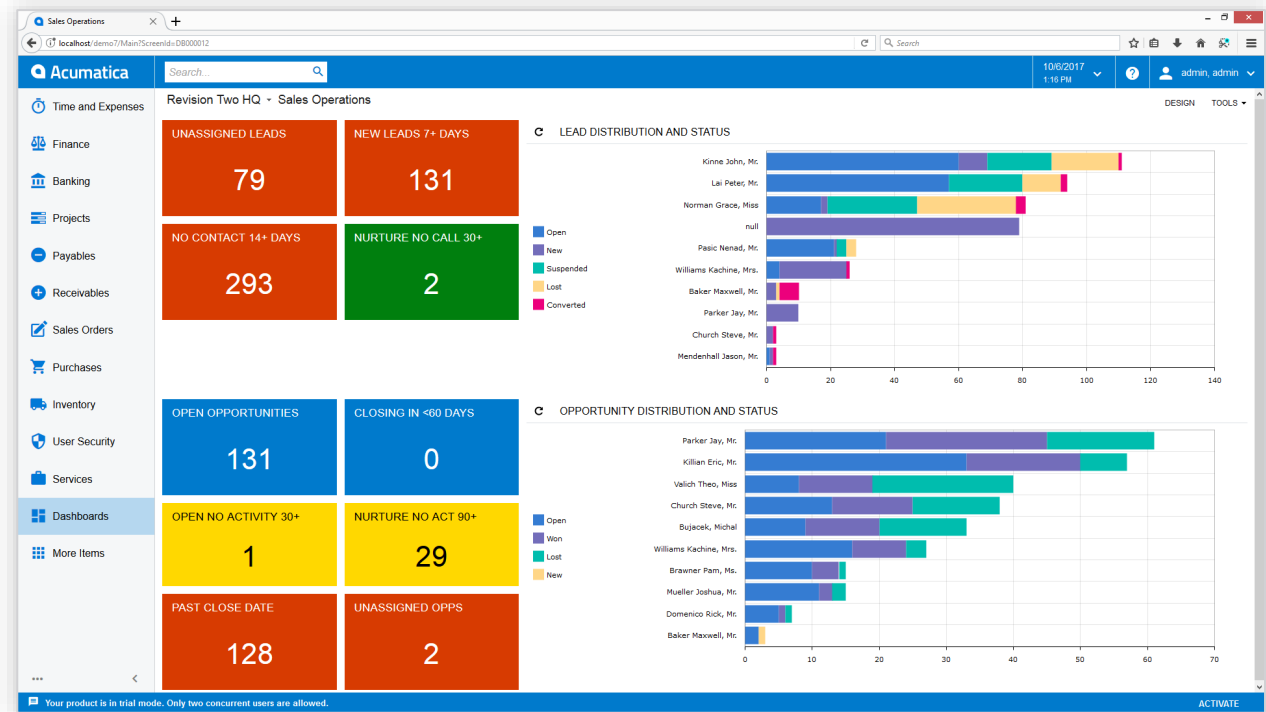
# What's the Key Impact?

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- Interactive, real-time dashboards
- Customizable
- Role-based Security
- Mobile Device integration







# Acumatica

The Cloud ERP

## Product Demo



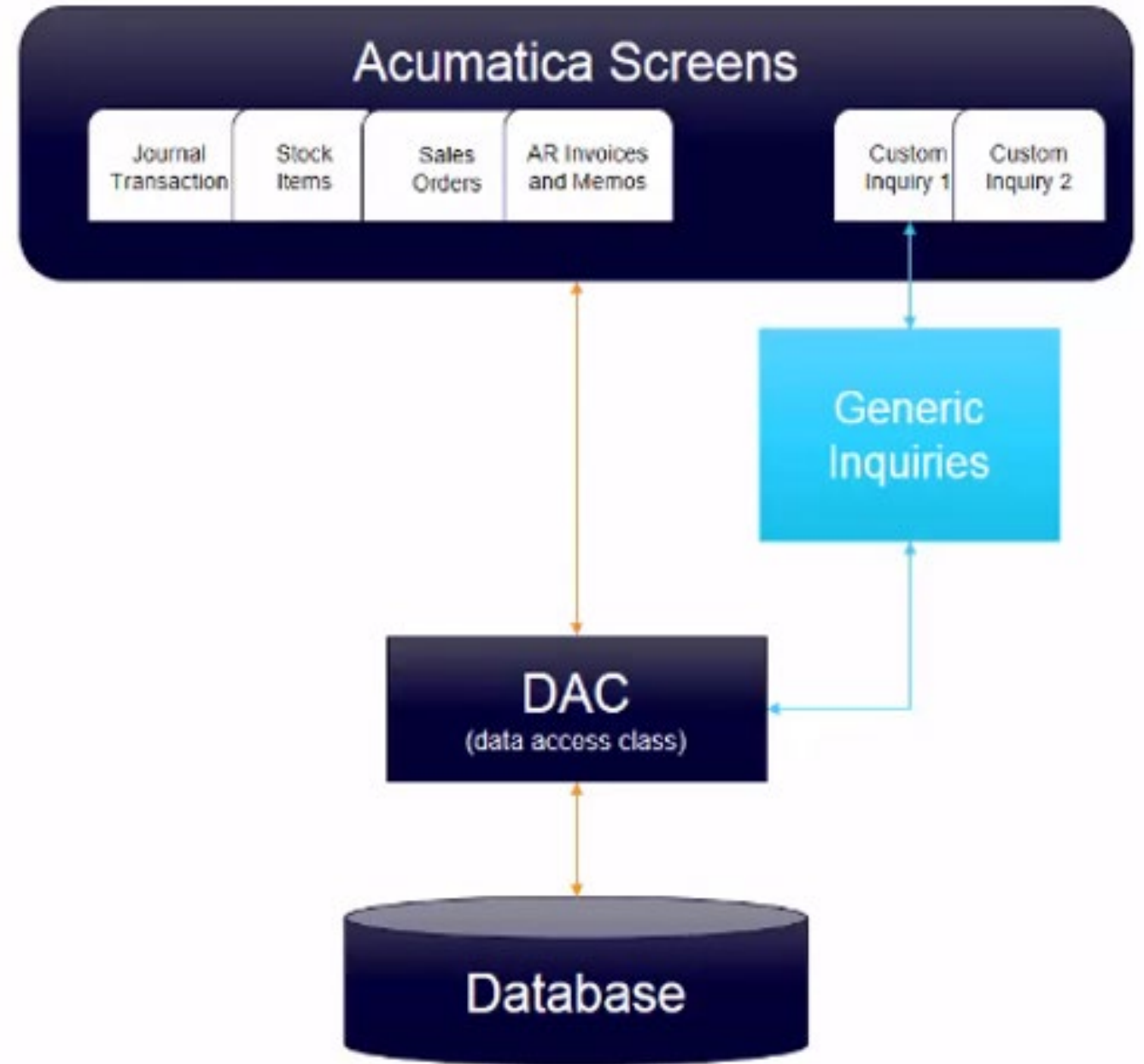
# Generic Inquiries in Acumatica

## Query to the Database

### Benefits:

#### Customized reporting:

- Drill into other inquiries, screens or details in transactions.
- Export information to Excel
- Create Custom Lists, Reports, Pivot Tables, Dashboards
- Extendable –expose via OData using Acumatica APIs to push data out.



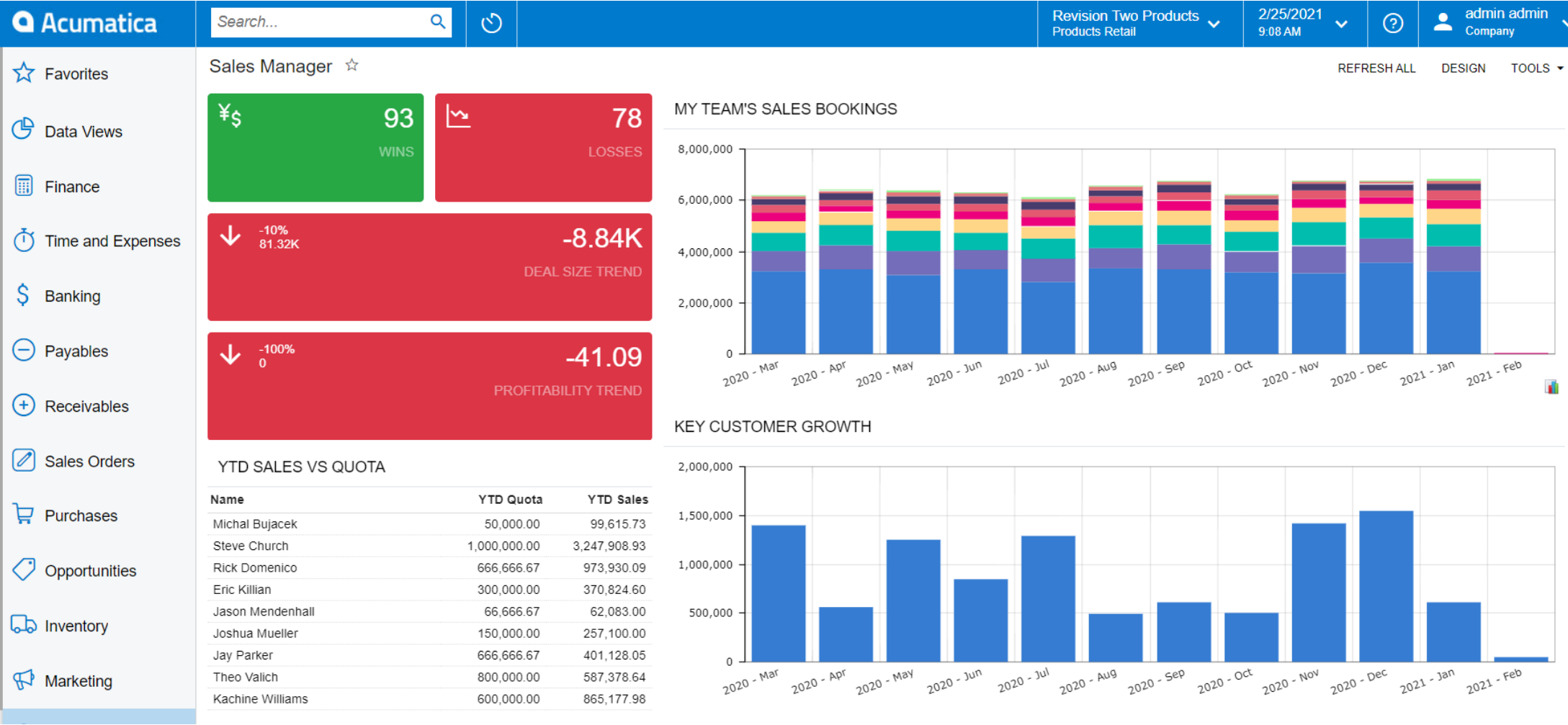
# Pivot Tables

- What Do you want analyze?
- Example: Collection of Sales Data
  - What items did customers buy?
  - What were the sales numbers?
  - What timeframe?
  - What States are our products selling in?

INVOICED ITEMS PIVOT    SALES ANALYSIS PIVOT TABLE    SALES BY PRODUCT BY QUARTER

	Customer Country					
	Invoice Date					
Inventory	2021 Q1	2020 Q4	2020 Q3	2020 Q2	2020 Q1	2019 Q4
Is Empty	\$10,965,281.93	\$12,946,695.27	\$6,730,063.92	\$38,449.61	\$19,331.09	\$26,704.32
AACOMPUT01	\$652,500.00	\$1,588,500.00	\$1,494,500.00	\$1,660,500.00	\$1,526,500.00	\$1,494,625.00
AALEGO500	\$309,100.00	\$876,700.00	\$771,100.00	\$765,600.00	\$819,610.00	\$773,300.00
AAMACHINE1						
AAPOWERAID	\$9,139.20	\$29,131.20	\$30,116.80	\$27,507.20	\$26,488.00	\$21,134.40
ACCOMODATE						
ADMCHARGE	\$14.30	\$14.35				
AMCTOBAT		\$114.20				
APPRENTICE		\$0.00	\$0.00			
CARRENT		\$8.10	\$153.93			
CONAIR1						
CONBABY1	\$142,878.21	\$569,746.27	\$510,844.29	\$485,516.64	\$472,516.23	\$592,422.87
CONBABY2	\$567,215.98	\$1,773,980.29	\$1,684,167.32	\$2,104,304.98	\$1,995,804.58	\$1,516,594.48
CONBABY3	\$233,594.90	\$590,805.69	\$577,788.75	\$634,018.00	\$522,923.17	\$436,073.33
CONBOTTLE1	\$44,221.68	\$124,421.77	\$125,669.52	\$111,428.64	\$108,680.40	\$110,679.12
CONCHAIR1	\$60,392.64	\$156,471.14	\$173,628.84	\$195,589.80	\$155,099.28	\$142,059.96
CONCRIB01						
CONCRIB02						
CONGOLFR1						
CONGRILL	\$70,393.60	\$202,381.60	\$197,982.00	\$164,985.00	\$208,981.00	\$160,585.40
CONGRILLT	\$7,737.60	\$22,245.60	\$21,762.00	\$18,135.00	\$22,971.00	\$17,651.40
CONHEARTM1	\$242,435.70	\$817,100.82	\$777,037.50	\$748,023.19	\$692,081.40	\$670,674.46
CONKID1	\$31,352.40	\$121,926.00	\$103,346.80	\$105,669.20	\$109,152.80	\$91,734.80
CONKID2	\$51,032.80	\$191,373.00	\$202,308.60	\$169,501.80	\$165,856.60	\$143,985.40
CONMITT	\$114,029.90	\$322,906.74	\$325,038.50	\$258,964.23	\$290,936.10	\$200,351.70
CONPAPERST	\$2,860.00	\$10,019.42	\$6,740.00	\$2,600.00		
CONPEN100	\$2,280.00	\$7,200.20	\$6,200.00	\$2,080.00		
CONPENC100	\$3,990.00	\$12,249.88	\$10,850.00	\$3,640.00		
CONSULTING	\$257,100.00	\$720,798.59	\$809,901.57	\$892,299.13	\$667,297.25	\$792,401.88

# Dashboards





## Summary

- Single Source of the Truth
- Security by Role
- Multiple Display Options

**STOP**

scratching your head about

**ANALYTICS & REPORTING!**

# UPCOMING EVENTS

**MARCH 17<sup>TH</sup>**

Amplify your ERP  
Systems using Artificial  
Intelligence

**APRIL – MAY - JUNE**

Q2 Lunch & Learn  
schedule coming soon...

**July 18<sup>th</sup> -23<sup>rd</sup>**

Acumatica Summit 2021  
In Las Vegas





READY, SET, GO!



THANK YOU!

Any questions?





# CONTACT US

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