

# ARC 6532 – Customer Information and YTD Sales

This dashboard benefits the customer in many ways

**Sales** – you can quickly get YTD Sales, customer data (sold to/ship to), see who is set up as a partner, and see which customers haven't had any sales in the selected year.

**Accounting** – You can quickly get the Phone Number and email address associated with any account, and if data is wrong, you can quickly click on the "Customer name" and update the A/R Customer File.

**Quotes** – You can quickly figure out which customers should get partner pricing, and what Reps they are linked to.

**Customer Service** – You can use this to quickly figure out a variety of things: what Rep, what RSM, partnerships, Ship To addresses, and double check account information when needed.

**Leadership** – We can use this to make sure the data integrity of each customer is correct: shipping terms, partnerships, sales by territory, sales by state, sales by rep, etc.

Customer YTD Sales (PLA)																					
Year	2021																				
Customer	Customer name	Address 1	Address 2	City	State	Zip	Country	Phone	Email	Sales...	Customer...	Address 1 - Ship	Address 2...	City - Ship	State - Ship	Zip - Ship	Country -...	YTD Sales...	Carrier	Branch	
-	001000	TEXAS CUSTOM	317 HAZEL STREET P.O. BOX 728	HOUSTON	TX	998880009	USA	7136599955			TEXAS CUS...	317 HAZEL STREET		HOUSTON	TX	998880000	USA	0.00	UPS	FL	
✖		Ship ID	Customer Ship Name		Address 1		Address 2		City		State		Zip		Country						
→		000001	TEXAS CUSTOM		SHIP TO 1		HOUSTON		TX		77058										
		000002	TEXAS CUSTOM		SHIP TO 2		HOUSTON		TX		77062										
+	123456	GCG TEST CO 1									GCG TEST...							0.00	UPS		
+	179331	GCG TEST CO 2									GCG TEST...							0.00			
+	300000	LINDQUIST MACHINE	1200 BAETEN ROAD	GREEN BAY,	WI	54304		4143231200			LINDQUIST...	1200 BAETEN ROAD		GREEN BAY,	WI	54304		0.00	UPS		
-	375000	PAPER CONVERTING	2300 SOUTH ASHLA...	GREEN BAY,	WI	543044434		4147346895			PAPER CO...	2300 SOUTH ASHLA...		GREEN BAY,	WI	54304		0.00			
✖		Ship ID	Customer Ship Name		Address 1		Address 2		City		State		Zip		Country						
+	ABCDEF	GCG TEST CO 1									GCG TEST...			TX		77379		0.00	HARRIS		
+	AMD	ADVANCED MICRO D...	2092 LAWRENCE EX...	SANTA CL...	CA	94039		4089901000			GCG TEST...	2092 LAWRENCE EX...		SANTA CL...	CA	94039		15.00			
+	AND	ANDERSON WINDOWS	1000 BROADWAY	MINNEAPOL...	MN	55421		6122421000			ANDERSON...	1000 BROADWAY		MINNEAPOL...	MN	55421		0.00			
+	APMAT	APPLIED MATERIALS	US HWY 290	AUSTIN	TX	77690		4123042000			APPLIED M...	US HWY 290		AUSTIN	TX	77690		0.00			
+	BMF	BERGER METAL FABR...	2163 MARTIN AVE	SANTA CL...	CA	86069		4089224639			BERGER M...	2163 MARTIN AVE		SANTA CL...	CA	86069		0.00			
→	BOE	BOEING INC.	3400 WESTWAY	SEATTLE	WA	55049		2062901000			INC.	3400 WESTWAY		SEATTLE	WA	55049		0.00			
+	DAO	DIAMOND DAVE'S LTD	777 HEAVEN	P.O. BOX 777	ODELL, TX	777777777	USA	8178506025			DAO...	777 HEAVEN	P.O. BOX 777	ODELL, TX	777777777	USA	26.00	UPS			
+	FRT	FREIGHTLINER TRUC...	6500 NORTH LOOP...	MARION	IN	46964		3174408393			TLI...	6500 NORTH LOOP...		MARION	IN	46964		23,069.64			
+	GE	GENERAL ELECTRIC	4400 WEST GLENST...	LOUISVILLE	KY	55623		5023310000			G.E.	4400 WEST GLENST...		LOUISVILLE	KY	55623		5,000.00			
+	M75117	TEST	TEST bvd	Tomball	TX	77377		Tomball			Refresh	TEST bvd		Tomball	TX	77377		0.00			
+	M75118	TEST 2	TEST 2 Rd	Houston	TX	77058					Export	TEST 2 Rd		Houston	TX	77058		0.00			
+	M75120	TEST 3	TEST 3 Rd	Houston	TX	77058					Reset Columns	TEST 3 Rd		Houston	TX	77058		0.00			
+	M75122	TEST 44	TEST 41	Houston	TX	77058		3193660540	test@gmail.c...	BRYAN...	TEST 4	TEST 4		Houston	TX	77058		0.00	FEDEX		
+	MK	MORRISON KNUDSON	MK DRIVE	P.O. BOX 77...	HORNELL	CO	868671258	3039643700			MORRISON...	MK DRIVE		HORNELL	CO	868671258		0.00			
+	ROCK	STAN ROCK CO. INC.	3283 S. HAZEL ST.	PO BOX 784	OVERTON	MI	81769	8007543297			ROCK...	3283 S. HAZEL ST.		PO BOX 784	OVERTON	MI	81769		0.00		
+	TECK	TECKTRONIX INC.	4000 CIRCLE DRIVE	BEAVERTON	OR	40039		5034503302			TECKTRON...	4000 CIRCLE DRIVE		BEAVERTON	OR	40039		0.00			
+	TSTBP1	TEST BRYAN 1									TEST BRYA...							0.00	UPS		
+	XEROX	XEROX	9000 COPY CAT	P.O. BOX 77...	NEW YORK	NY	098761111	2123341000			XEROX	9000 COPY CAT		NEW YORK	NY	098761111		0.00	UPS		

Firstly, enter the year you want to see the YTD Sales to Year text box (default value is current year), then hit Refresh button (or right click and hit Refresh) to create the gridview.

From there, all the Customer information show, hit "+" to see corresponding Ship To info.

Hit "Customer Name" if you want to edit Customer master.

Right click on the gridview:

Refresh: re-create the gridview

Export: export the gridview to Excel spreadsheet

Reset columns: reset columns order, format to default set up.