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.

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.