**A close up of a sign

Description automatically generated**

**LUNCH AND LEARN 2020**

**Demo Flow** (25 MINUTES)

**Theme:** User friendliness, mobility, connected workplace

*\*Note: This is a template – you are welcome to modify content as you see fit.*

**Prep work:**

1. Install the Snapshot provided by Acumatica (20.093.0108)
2. To demo SMS message notifications:
   1. Make sure to set Maxwell Baker’s Phone 1 # to your own cell phone (Navigate to the Employees screen > Select Maxwell Baker > Phone 1 field = your cell phone #)
   2. Email [jgadbois@acumatica.com](mailto:jgadbois@acumatica.com) to request your phone number to be validated against the demo snapshot (which will allow you to receive the SMS notification)
3. In order to demo mobile, you will need to reflect your mobile device on to your laptop. This can be accomplished through:
   1. DESKTOP APPLICATION (SUCH AS AIRSERVER, MOBIZEN OR LONELYSCREEN)
   2. A HARD-WIRED CONNECTION (SUCH AS HDMI TO iPHONE/LIGHTNING ADAPTER)

* Test this connection with the AV team on-site upon your arrival. If you are experiencing issues or are uncomfortable reflecting your phone, you may want to provide screenshots instead. Mobile is a BIG differentiator for Acumatica and a key theme of this session, so it is important to discuss even if you can’t show it.

1. If you have any questions or need any assistance in preparing, please submit an Acumatica Pre-Sales case and our team would be glad to assist you.

**Demo:**

* **INTRO**
  + ERP – outdated term in my opinion – it’s really business management software, or business process software
  + Acumatica is the tool that acts as the single source of truth for your business - Front Office to Back Office
* **Access from anywhere** –all you need is an internet browser
* **Role based –** security driven permissions
  + **Show *Company selector***
    - * Acumatica supports –
        + MULTIPLE COMPANIES
        + MULTIPLE BRANCHES
        + MULTIPLE CURRENCIES
  + ***Workspaces* –** 
    - This is where we group together business process areas
      * Example: AP team works in AP workspace
    - Intuitivedesign, but easy to modify them and make them your own
    - All Departments are connected in real time using the Acumatica platform
      * *Key theme – connected workplace\** 
        + Highlight different **workspaces** operating together**:**

Financials

Sales Orders

Inventory

Purchasing

* + - * **Mention *FAVORITES***
        + *Key theme – usability\**

Acumatica is a modern platform – very easy to add custom fields, make screen changes, integrate with outside systems over our APIs

“IT’S SO EASY A CAVE MAN COULD DO IT” – okay fine, well in many cases - it’s so easy, a non-programmer can do it (we believe in the concept of no code, low code ERP)

* **DASHBOARDS AND BUSINESS INTELLIGENCE** 
  + Software companies are known for throwing around buzz words
    - Buzz words like Real Time, and Business Intelligence –
      * But What IS Business Intelligence? And what can the power of real-time business intelligence do for your organization?
    - Business intelligence is more than running a report
      * Business intelligence is having multiple types of strategies and tools at your fingertips to analyze YOUR DATA the way YOU WANT TO
        + This is the type of data you can use to make your boss look good!
  + ***DASHBOARDS*** 
    - *Key theme – usability\**
    - **Customer View Dashboard**
      * Acumatica dashboards provide leading industry metrics, key performance indicators, tasks, trends, and other critical pieces of information needed to run your business
      * Real time, with access to drill into the data being presented
        1. **SHOW DASHBOARD DRILL DOWN\***

***From Customer View Dashboard > Drill into OVERDUE AR***

*Key theme – usability\**

* + - * 1. **SHOW DASHBOARD PARAMETERS\***
        2. **SHOW DASHBOARD LEGENDS\***
    - **SHOW HOW TO DESIGN A DASHBOARD**

*Key theme – usability\**

Click DESIGN in top right corner of dashboard

Drag and drop tiles

Add new widget

**SHOW THE DIFFERENT TYPES OF DASHBOARD WIDGETS SUPPORTED BY ACUMATICA**

**Add a pivot tabl**e *(only if you are comfortable doing so)*

Inquiry Screen = Cases (CR.30.60.PL)

Pivot table = Case Summary

* + - **From Customer View Dashboard, Drill into OPEN OPPORTUNITIES**
      * **Discuss/show:**
        + **Generic inquiries\***

Huge differentiator for Acumatica

No need to build custom reports to get unique analytics

**Conditional highlighting\***

**Creating Filters\***

**Modifying columns\***

*Key theme – usability\**

* **AUTOMATIC NOTIFICATIONS** *(key themes – usability, mobile, connected workplace\*)*
  + Connected workplace constantly remains informed with different types of automatic notifications
  + **Dashboard notifications**
    - *Key theme – connected workplace\**
  + **Automatic Emails**
    - *Key theme – connected workplace\**
      * Example: get assigned a support ticket, email to your inbox with the Case # and link
  + **Push notifications**
    - *Key theme – mobile\**
  + **SMS Messages –** 
    - *Key theme – mobile\**
      * *IN ORDER TO DEMO MOBILE, YOU WILL NEED TO REFLECT YOUR MOBILE DEVICE ON TO YOUR LAPTOP. THIS CAN BE ACCOMPLISHED THROUGH:*
        + *A DESKTOP APPLICATION (SUCH AS AIRSERVER, MOBIZEN OR LONELYSCREEN)*
        + *A HARD-WIRED CONNECTION (SUCH AS HDMI TO iPHONE/LIGHTNING ADAPTER)*
      * *You should test this connection with the AV team on-site upon your arrival. If you are experiencing issues or are uncomfortable reflecting your phone, you may want to provide screen-shots instead. Mobile is a big differentiator for Acumatica so it is important to discuss.*
    - To demo SMS message notifications:
      * PRIOR TO YOUR DEMO, make sure to set Maxwell Baker’s Phone 1 # to your own cell phone # (Navigate to the Employees screen > Select Maxwell Baker > Phone 1 field = your cell phone #)
      * SEVERAL DAYS PRIOR TO YOUR DEMO, email [jgadbois@acumatica.com](mailto:jgadbois@acumatica.com) to request your phone number to be validated against the demo snapshot (which will allow you to receive the SMS notification)
      * **Business events screen**
        + Select: **Opportunity 1 – Salesperson assigned**

Trigger Conditions tab: Whenever a new opportunity is assigned to an owner, that owner will receive a text message

Subscribers tab: Mobile SMS Notification

* + - * **Back to Home Dashboard (Customer view dashboard)**
        + **Drill into Open Opportunities**

Select the ALL RECORDS tab

From the list, select a NEW opportunity that does not have an owner

On the Opportunity, make the Owner = Maxwell Baker.

REFLECT YOUR MOBILE DEVICE HERE

In about 15 seconds, you will receive an SMS text message to your mobile device

Show the text message

Mobile

**Log-in to the Acumatica app** to show you have access to all of the same data as you do from your laptop

Dashboards, Inquiries

Customers, Vendors, Orders etc

* **REPORTS**
  + Access reports in just a few clicks
    - Financial statements
    - Standard reports
    - Run a report (balance sheet, P&L etc)
      * **Show report drill down**
      * **Show grouping icon on reports**
      * **Show Print, Send, Export buttons**
      * **Discuss report writers**
* **The final part of the Demo will depend on your audience…**
  + **Distribution audience**
    - ORDER TO INVOICE
  + **Manufacturing audience**
    - BOM/PRODUCTION
  + **Projects/Construction audience**
    - PROJECTS
  + **Field Service audience**
    - SERVICE ORDER/APPOINTMENT
  + **Commerce audience**
    - BIG COMMERCE DEMO