

Social Media



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Overview

Crestwood Associates is an award-winning Acumatica and Microsoft certified partner with proven success in 5,000+ ERP implementations. For more than 20 years, Crestwood Associates has been providing innovative technology solutions to accelerate operational efficiencies for mid-market organizations. Best known for delivering unparalleled value to their clients, Crestwood serves thousands of clients nationwide, and is rapidly expanding reach across the United States.

For more information about Crestwood or ERP solutions, visit crestwood.com

CRESTWOOD 360 SALES VIEW

Make it easy for your sales team to sell with all information in one place in Acumatica



Sales, item, invoice, and customer analysis all in one place, instead of jumping from screen to screen.

View complete sales order and invoice history

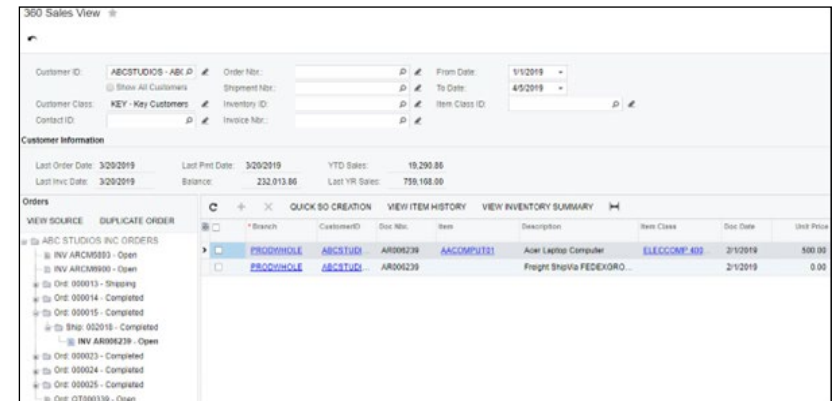
- Complete customer view with easy drill-down in the details.

Find any sales order and invoice fast

- Find any Sales Orders or Invoices by Customer, Customer Class, Order Number, Shipment Number, Item Number or Item Class.

Quick sales order entry

- Select any items from an existing customer order and easily do a "Quick SO Creation" to create another Acumatica Sales Order.
- Quickly create new sales orders from a previous customer order.



Create and analyze orders quickly

- Access the 360° Sales View directly from the Acumatica Sales Order and add items as requested by the customer.
- Easily view prices per item per customer.

KEY BENEFITS

Create Sales Quickly

- Easily find customer and inventory history
- Quickly create a duplicate sales order
- Rapidly recommend additional products your customers would be interested in

Sales Analysis

- View all orders or invoices for a particular product
- Quickly recommend additional products based on history

- Easily answer all your customer questions
- View profitability statistics

Item Analysis

- Easy inventory analysis
- View all sales orders by item or class
- See which customers purchased which products and at what profitability
- Quick profit report on items

Customer Relationships

- Quickly and easily answer all customer questions
- No screen jumping needed
- Do customer re-order on the fly



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Crestwood Associates
ERP Solution Experts

360 Sales View Features and Capabilities

One Central Screen

Get all your customer, Sales Order, and Invoice information in one place. No more screen jumping needed.

Complete Customer History

See all your customer history with easy drill-down into details.

1-Click Orders

Create orders for your customer with the Quick SO Creation.

Customer Analysis

Quickly analyze your customer's purchasing history and your profitability.

Complete Inventory Analysis

View all sales orders or invoices by inventory item or class. Simply enter an item ID and see which customers purchased the product and at what price and profitability.

Sales Rep Analysis

See which Sales Reps sold particular products and at what profitability to your company.

THE ACUMATICA ERP DIFFERENCE

Acumatica delivers a full suite of integrated business management applications unlike any other ERP solution on the market today.

Streamline Operations

Manage your business more efficiently:

- Automate processes
- Control workflows
- Access the system from anywhere on any device—including mobile
- Promote collaboration with all-inclusive user licensing

Adaptable Solution

Add and extend:

- Deploy in-house, or in a private or public cloud
- Easily configure your solution to fit your needs
- Add capabilities such as CRM or data visualization at any time
- Extend to other solutions and applications beyond ERP

Your Business Accelerated

Get a single version of the truth:

- Accelerate business performance and make smarter decisions with automated processes, real-time data collection, financial analyses, and forecasting
- No per-user pricing – system scales as your business grows

Learn more and request a consultation with our ERP Experts at crestwood.com

