Learn Acumatica Navigation in Under 15 Minutes

Hi everyone, I'm Cailee Hanson with SVA Consulting, and in this video, we'll just walk through a little bit of a general navigation and orientation to the Acumatica system. So maybe this is your first time working within Acumatica, or you just want a refresher on how you might navigate around different areas within the system. So we'll just highlight a couple of those today.

So to start, I've logged into Acumatica, and you'll see that I am on kind of this homepage dashboard. So this dashboard is what I have set as my homepage, connected to my user within the system, and in this case, I have it on this customer view dashboard. So yours may be the same view, it may be different, and that's okay. Kind of what we'll walk through today will be similar, no matter, maybe what you have within a dashboard view, for example.

So we have our dashboard, we'll walk through a couple components, but before we get to the dashboard, I just want to orient you to the menu structure on the left-hand side. So this menu structure is on, like I said, the left-hand side, and each of these menu items are called a module. So whichever modules you'll have access to within Acumatica, those will be shown on the left-hand side. So I have access to a lot of areas within the system, you know, but maybe if you were just working in sales, you might just have access to something like sales, orders, and inventory, for example. Whereas a finance person may have access to more of those financial areas, like the finance and banking modules. So I have kind of a lot here, and I'll go ahead and walk through some of this structure.

So again, modules on the left-hand side, and then if I were to drill down into those, this is where I have access to all of those menu items that exist within a specific module. So again, this structure would trim a bit both on the menu on the left-hand side, as well as the menu options that are available with each module based on your security profile. So again, you'll only have access to the areas that you should within the system, and that may be the same or different than mine. Typically, it will be a little bit more trimmed than what I'm showing you today.

So again, you can access the different areas on the left-hand side here. So your general ledger will be the finance module. Your banking and cash management will be the banking module. Accounts payables will be payables, accounts receivables will be receivables. Pretty straightforward. Sales orders will be things like sales orders, invoices, shipments, that sort of thing, inventory and purchasing. So a couple areas I'll highlight today, but pretty intuitive in terms of some of the naming on the left-hand side.

If for some reason you don't have access to certain elements that you think you should, check in this more items option. So once I click on that, that's going to show me everything I have available. And let's say I should have access to some of the CRM components, so the marketing and opportunity modules, I can go ahead, hover over and pin them, and what that will do is pin them to that left navigation. So again, anything you don't have on your menu that maybe you should have access to, you can't find it, a lot of times it can be hiding in that more menus, more items menu. So you can go ahead, toggle in there and, like I showed, pin those to your left-hand side.

All right. So now we'll kind of navigate around these. Again, menu items, additional menu options when you get into those specific modules. And so it'll be structured pretty, pretty similarly across the modules, so you'll have things like your transactions and profiles on the left-hand side, and then some more of the reporting and preferences on the right-hand side. So typically, you'll be working within a lot of these transactions and profiles. So if I wanted to go into my sales order profile, for example, can click into that, and this will take us to what we refer to as a generic inquiry.

So you'll see this as it loads, but really, what this leads me to is really a list view of data. So the list view of data, again, exists throughout the entire system. This will be looking at specifically my list of sales orders. So when I drill down into that, this is just giving me all of my historical sales orders I can filter by all of these different columns. So if I just wanted to see any sales orders that are on open, for example, this is just trimming that list to my list of open sales orders. Maybe I just want to see anything where that order total, maybe it's a little bit greater. So I'm going to say is greater than 100 I can filter there. So all of these columns across the system, when you get into these generic inquiry views, will be filterable, so you can go ahead and filter those at the top. And then you can also do things like, you know, drag and drop some of these columns. So if I wanted that view to be just a little bit different, I can drag and drop those as well.

So again, I'm showing you it on the sales order side, but it's available throughout the entire system, so kind of a handy tool across the system. And then anything that I filter on, I can go ahead and save that. So for now, everything is kind of personal to myself, so you don't have to worry about changing the view for everyone in your system when you're creating new filters, creating, you know, different views by dragging and dropping some of those columns. So it's all specific to your user, but then I can save these as well. So if I wanted to come back to this view, every time I opened up my sales order screen to just say, you know, I just want to see open sales orders over $100, I can go ahead and do so, and press Okay, and then it's going to toggle at the top as a new view based on my filter. So we're going to have all my records and then any saved filters that I have at the top and again, available throughout the entire system.

So that's kind of some of the navigation components. I'll also highlight the idea of side panels. So you'll see different icons light up across various areas within the system, and the side panels are a good tool for viewing additional information within these inquiry views without necessarily needing to drill down into them. So I could, I could drill down into the sales order, for example, I just opened that in a new tab by pressing Ctrl + click, so that's also available within Acumatica. So I could drill down that way, right, and see the details there. If I wanted to see the next sales order, I can toggle between those if I have any. Otherwise, the side panel view will allow me to view those details without having to drill down into it. So what it's going to do is pop open that right hand side and it's going to drill down into that specific sales order in this case.

So I go back to all my records, I can toggle between these, and once I do, it's going to update that right-hand side. Same thing for something like a customer. So I want to look at the customer details for the Summit Construction Group. I can do so with that side panel view. I can kind of adjust this as well. So I wanted to see, Okay, let's look at the details for Alta Ace now, then that information is updating. So again, anything on the left-hand side, if you toggle between it, that right-hand side will update as well.

So you can play around with some of these views. There's a lot out-of-the-box, and then there's a lot of opportunity for us to add additional side panels. So anytime you want some sort of view within that side panel, that's a capability as well, but kind of a neat tool there.

So we walked through some of the menu structure, some of these inquiry tools in the side panels. I'll go back to the menu structure for a second as well. You'll notice there's things like these quick tiles at the top. So what these will do is automatically prompt you into an entry screen. So while I'm on a specific screen, I can always create a new record by clicking this plus button. Otherwise, within each module, there's kind of quick action buttons that will automatically launch you into that screen. So if I knew, Okay, I want to create a new sales order in the system, I can do so by clicking, again, either that plus button on the previous screen or just clicking, clicking on this Quick Menu, and it launches you automatically into that entry screen. Kind of both options available.

And then lastly, there's the idea of favorites. So if you hover over any of these menu items, you can go ahead and favorite them, and once you do so, those will show up in your Favorites menu at the top. So I have a lot. It can get a little bit overwhelming, but you'll see it does kind of categorize it by the module it's under. And then you can go ahead and favorite it or unfavorite it as well, and then that will take you to that specific screen. And then anytime I click this logo and top left corner, that's taking me back to my homepage. So now I'm on my dashboard. You can navigate through the dashboards as well. Again, these will be a little bit more specific to your role within the organization, but as you would expect, the dashboard is completely drillable. So I can look at different metrics, different charts, etc, within my dashboards. And in this example, if I want to see, okay, I have 95 orders to ship, I can drill down into that. And that's going to give me a similar inquiry view that we saw earlier, to see okay, these are just all my orders that are open and are ready to ship. So in this case again, can drill down into those, could look at some of the details there, and then, I can go ahead and do things like create a shipment from here. Again, could always drill down into those further, create some next action steps, etc, that order.

So the dashboards are a way to kind of feed you into different areas of the system, see some data, and then again, you can do some next action steps from there as well. So there's a lot more to the dashboards. We'll kind of keep it high level for now, but feel free to play around with it, and obviously reach out if you have any questions.

And then the last tool I'll highlight in some of this navigation will be on the header level itself. So here I might want to search for a specific menu item. I don't know, you know, where would I create a new purchase order, for example. I could go to my purchasing module, pretty straightforward, but if I didn't exactly know where it was, I could go ahead, type it into the top menu, and then I can say, Okay, I'm going to create a new purchase order and then drill down into that menu option from there as well. So the universal search will search across menu items. I will also search across transactions and profiles. So I could search things like a customer name. We've seen Alta Ace in that list. Can search that in the top, and then what it's going to do is pop me open into anything that's matching that customer. So it can be the customer profile, any transactions against it, and then I can also search for specific fields, so let's say I just wanted to search a phone number. I could go ahead and do so, and once I do it's going to find anything that's meeting that criteria within the system. So in this case, this contact is associated with that specific number. And so I searched that and found it in a universal search.

And then another kind of key component, especially when using Acumatica for the first couple of times. If you need assistance in any area, you can search that within this universal search too, and go to this Help Topics tab. And what that will do is, will it will search through Acumatica’s Help documentation, and this is where I can start to find things like, Okay, how might I create a sales order? Or in this case, how might I convert an opportunity into a sales order? All it will do is search through the help documentation, try to find some matches, and then when you click on it again, you're in Acumatica’s Help system. So then you can see other areas within the system as well. So maybe I want to see how I might start with the sales quote. I can walk through that. There's different activities as well. So it will just give me a lot of information, some how-to scenarios. So whenever you might be stuck, that's always a good option as well. And then that's available within specific screens too. So if I wanted to go into my contact screen, I had questions on, you know, where would I put certain information? What are these fields? Any screen you're on, you can click on this help question mark in the top right corner, and then that will feed you into related information within the help documentation as well. So you could look at the reference form. You could also look at these activities. And really, those are how-to activities, and they exist throughout the entire system. So this will walk me through step by step. How do I create a contact, for example, within Acumatica? And so that will really be helpful, especially, you know, if you have questions early on, you can always use that little icon. It will help you with whatever, whichever place you are within Acumatica.

And then lastly, there's this little breadcrumbs icon. And what this will track is just where you were last within the system. So you can see, I was on this specific contact. Before that, I was on my own contact, a sales order, etc. So what it's going to do is just track where you were. So maybe you're like, you've kind of closed out of something. You don't know where you were last. You want that record, you can use that breadcrumbs tool, and that will just drill you back directly into it. And then anything you might be tracking, you know, maybe you're tracking a specific order for a customer, or a shipment, things like that, you can track as well and favorite them. And then anytime you come back into this, it's going to be on that Favorite side as well. So kind of a handy tool to get you back to where you are within the system.

So that was kind of a broad overview. There's a lot there, but hopefully that gives you a pretty good orientation to just get started with Acumatica, play around with it a little bit. So obviously, if you have any questions, please feel free to reach out to us, and we're more than happy to help. But I hope that was helpful, just as a starting point, thank you.