



Acumatica – User Group 2/10/2021



Pivot Table – Overview

Four Examples:

- Open Back Orders
- Open Receivable Invoices
- Multi Year Vendor Payment History
- Sales Profitability Analysis
 - By Item
 - By Salesperson
 - By Customer



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Consulting Solutions Training Support

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Acumatica Pivot Table – Overview



Pivot Tables

In Acumatica ERP, you can compose pivot tables based on the data of generic inquiry results. Pivot tables are a technique in data processing that you can use to reorganize and summarize data in a generic inquiry, to view this data from different perspectives.

A pivot table can automatically sort, count total, or present the average of the data obtained in a generic inquiry, displaying the results in a separate table. You can configure and change the structure of pivot tables by dragging their fields.

The screenshot shows the 'Pivot Tables' configuration window in Acumatica ERP. The configuration includes:

- Screen ID:** Invoiced Items
- Pivot Table ID:** Invoiced Items Pivot
- Name:** Invoiced Items Pivot
- Shared Filter to Apply:** All Records
- Site Map Title:** Invoiced Items Pivot
- Workspace:** Data Views
- Category:** Pivot

The configuration also shows a list of fields and filters:

- Fields:** Address Line 1, City, Country, Customer Class ID, Customer ID, Customer Name, Description, Ext. Amount, Ext. Cost, Ext. Profit, Financial Period
- Filters:** Customer Class ID, Item Class, Financial Period
- Columns:** Invoice Date
- Rows:** Inventory ID
- Values:** Ext. Amount

The resulting pivot table is titled 'INVOICED ITEMS PIVOT' and displays data grouped by Customer Class ID and Item Class. The table includes columns for Invoice Date (2020 Q1, 2020 Q2, 2020 Q4, 2021 Q1, 2021 Q4) and a Total column.

Inventory ID	2020 Q1	2020 Q2	2020 Q4	2021 Q1	2021 Q4	Total
CONEMPTY	19,232.09	36,593.08	3,716.58	72.90		61,614.65
CONACMPUT01	1,526,500.00	1,406,000.00	4,380.00	2,900.00		2,941,780.00
CONALEGO500	819,610.00	765,710.00	110.00			1,585,430.00
CONAPOWERAID	26,468.00	27,507.20				53,975.20
CONCHAIRT1				284.90		284.90
CONBABY1	472,516.23	485,516.64				958,032.87
CONBABY2	1,985,804.56	2,104,304.98				4,100,109.56
CONBABY3	522,923.17	634,018.00				1,156,941.17
CONBOTTLE1	108,680.40	111,428.64				220,109.04
CONCHAIR1	185,099.28	185,989.80				371,089.08
CONGRILL	208,981.00	164,985.00				373,966.00
CONGRILLT	22,971.00	16,135.00				41,106.00
CONHEARTM1	692,081.40	748,023.19				1,440,104.59
CONKID1	109,192.80	105,969.20				214,822.00
CONKID2	165,856.60	169,501.80				335,358.40
CONMITT	260,936.10	266,964.23				527,900.33
CONPAPERST		2,600.00				2,600.00
CONPEN100		2,080.00				2,080.00
CONPEN100		3,640.00				3,640.00
CONCONSULTING	667,297.25	592,299.13				1,259,596.38
CONTENBAL1	78,222.10	87,011.10				165,233.20
CONTRAIN1	8,125.70	7,929.90				16,055.60



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Pivot Table – Overview

Example 1: Back Orders

1. Open the Transactions Sales Order
2. On the top right select the “...”
3. Click **Save As Pivot**
4. Call it “**Back Orders**”

The screenshot shows the Acumatica Sales Orders interface. On the left is a navigation sidebar with categories like Favorites, Data Views, Time and Expenses, Forms, Banking, Projects, Payables, Receivables, Dashboards, More Apps, and Sales Orders. The main area displays a list of sales orders with columns for Order Type, Status, Order Nbr., Customer, Customer Name, Date, Order Total, and Description. A context menu is open over the first row (Order Nbr. SO005830), showing options: Save As, Save As Pivot, and Remove. A red arrow points to the 'Save As Pivot' option.

Order Type	Status	Order Nbr.	Customer	Customer Name	Date	Order Total	Description
SO	Back Order	SO005830	ABGHOLDING	ABC Holdings Inc	2/9/2021	5,205.80	
SO	Open	SO005829	FDIGREEN	Green Cooks	1/4/2021	586.36	
SO	Open	SO005828	ABARTENDE	USA Bartending School	6/30/2020	2,860.00	
SO	Open	SO005827	FDIGREEN	Green Cooks	6/30/2020	500.00	
SO	Open	SO005826	FDIGREEN	Green Cooks	6/30/2020	500.00	Acer Laptop
SO	Completed	SO005825	FDIGREEN	Green Cooks	1/3/2021	586.36	
SO	Back Order	SO005824	ABCVENTURE	ABC Capital Ventures	6/30/2020	909.00	Acer Laptop
SO	Completed	SO005823	ACCU	ACCU	6/30/2020	500.00	Another Laptop
SO	Completed	SO005822	AACUSTOMER	Alta Ace	12/31/2020	1,440.00	
SO	Completed	SO005821	ABARTENDE	USA Bartending School	6/30/2020	1,435.00	Acer Laptop
SO	Open	SO005820	AACUSTOMER	Alta Ace	12/31/2020	500.00	
SO	Completed	SO005819	AACUSTOMER	Alta Ace	12/31/2020	1,440.00	
SO	Completed	SO005818	AACUSTOMER	Alta Ace	12/31/2020	500.00	
IN	Completed	AR008512	CJOEQUIP	Jersey Central Office Equip	12/28/2021	80.00	Contract with Standardized Billing...
SO	Completed	SO005817	ABARTENDE	USA Bartending School	12/22/2020	3,510.00	
IN	Completed	AR008509	AAA	AAA East Central	12/22/2020	3,720.00	3 Ton 14 SEER Multi Speed Trane...



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Pivot Table – Overview



Example 1: Back Orders

1. Drag the field – **Customer Name & Order Nbr.** to the Rows box
2. Click Customer Name field and change properties:
 - Show Total – remove the check box
 - Width change from 100 to 250
3. Click Order Nbr. field and change properties:
 - Show Total – remove the check box
4. Drag the field – **Date** to Columns box
 - Change property Round To – Months
5. Drag the field - **Order Total** to the Values box
6. Top Filter Status – set to **Backorder**

The screenshot shows the Acumatica Pivot Table configuration interface. At the top, there are filters for Order Type (All), Status (= Back Order), Date (All), and Customer (All). The interface is divided into four main panes:

- Fields:** A list of available fields including Behavior, Branch, Branch Name, Created By, Created On, Currency, Customer, Customer Name, Customer Order Nbr., Date, Default Salesperson, Description, Last Modified By, and Last Modified On.
- Rows:** Fields placed in the rows area, including Customer Name and Order Nbr.
- Values:** Fields placed in the values area, including Order Total.
- Columns:** Fields placed in the columns area, including Date.

On the right side, there is a **Properties** pane for the selected field (SOOrder.OrderDate). The properties shown are:

Field Name	SOOrder.OrderDate
Caption	Date
Aggregate	Max
Sort Order	Ascending
Sort By	Value
Show Total	<input type="checkbox"/>
Collapsed	<input type="checkbox"/>
Show Empty Value As	
Width	100
Format	yyyy - MMM
Date Part	None
Round to	Months



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Pivot Table – Overview

Example 1: Back Orders


1. Click the Cog  to review the results
2. Click the amount to drilldown to see the details

Sales Orders ☆

ALL RECORDS MY SALES ORDERS QUOTES OPEN ORDERS **BACK ORDERS**

Order Type: All Status: = Back Order Date: All Customer: All

Customer Name	Order Nbr	Date	
		2020 - Jun	2021 - Feb
ABC Capital Ventures	SO005624	909.00	
ABC Holdings Inc	SO005630		5,205.80



ALL RECORDS MY SALES ORDERS QUOTES OPEN ORDERS BACK ORDERS **DRILLDOWN**

Order Type: All Status: = Back Order Date: All Customer: All

Ord Type	Status	Order Nbr.	Customer	Customer Name	Date	Order Total	Curr	Created
SO	Back Order	SO005630	ABCHOLDING	ABC Holdings Inc	2/9/2021	5,205.80	USD	2/9/2021



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Pivot Table – Overview

Example 2: Open Invoices

1. Open the Transactions Invoice and Memos from Receivables workspace
2. On the top right select the “...”
3. Click **Save As Pivot**
4. Call it “**Open Invoices**”

Invoices and Memos ☆

ALL RECORDS A OPEN INVOICES

Type: All Status: = Open Date: >= '2/1/2020'

Customer	Customer Name	Reference	Post Period										Total
			03-2020	04-2020	05-2020	06-2020	11-2020	12-2020	01-2021	12-2021			
AAA	AAA East Central	AR008506							8,500.00			8,500.00	
		AR008507							3,500.00			3,500.00	
		AR008508							4,260.00			4,260.00	
		AR008510							3,720.00			3,720.00	
	Total								19,980.00			19,980.00	
AACUSTOME	Alta Ace	AR008390				7,000.00						7,000.00	
		AR008445				4,316.88						4,316.88	
		AR008517							568.88			568.88	
		AR008518							1,508.88			1,508.88	
	AR008519							1,508.88			1,508.88		
Total					11,316.88		3,586.58				14,903.24		
ABARTENDE	USA Bartending School	AR008438				75,442.00						75,442.00	
		AR008462				80,000.00						80,000.00	
		AR008499						75.00				75.00	
		AR008500							110.00			110.00	
		AR008501							509.75			509.75	
		AR008511							3,510.00			3,510.00	
Total					155,442.00	75.00	4,129.75				159,646.75		
ABCSTUDIO	ABC Studios Inc	AR008391				16,800.00						16,800.00	
		AR008490				130,830.00						130,830.00	
	Total				147,630.00						147,630.00		
		AR008221			26,901.00						26,901.00		



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Example 2: Open Invoices

1. Drag the field – **Customer, Customer Name** & **Reference Nbr.** to the Rows box
2. Click Customer field and change properties:
 - Show Total – remove the check box
3. Click Customer Name field and change properties:
 - Width change from 100 to 250
4. Click Customer Name field and change properties:
 - Show Total – remove the check box
5. Drag the field – **Post Period** to Columns box
6. Drag the field – **Balance** to the Values box
7. Top Filter Status – set to **Open**

The screenshot shows the Acumatica report configuration interface. At the top, there are filters for Type (All), Status (= Open), and Date (All). The interface is divided into four main panels:

- Fields:** A list of available fields including Amount, Balance, Batch Nbr., Branch, Branch Name, Cash Discount, Created By, Created On, Currency, Customer, Customer Name, Customer Order Nbr., Date, Description, Due Date, and Last Modified By.
- Rows:** A list of fields currently in the report rows. 'Customer', 'Customer Name', and 'Reference Nbr.' are listed. 'Customer' and 'Customer Name' are highlighted with a red box.
- Values:** A list of fields currently in the report values. 'Balance' is listed and highlighted with a red box.
- Columns:** A list of fields currently in the report columns. 'Post Period' is listed and highlighted with a red box.

On the right side, there is a **Properties** panel for the selected field (Customer Name). It shows the following properties:

Field Name	BAccountR.AcctName
Caption	Customer Name
Aggregate	Count All
Sort Order	Ascending
Sort By	Display Value
Show Total	<input checked="" type="checkbox"/>
Collapsed	<input type="checkbox"/>
Total Label	
Show Empty Value As	
Width	200
Format	



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Example 3: Vendor Payment History

1. Open the Transactions Sales Order
2. On the top right select the "..."
3. Click **Save As Pivot**
4. Call it **"Vendor Payment History"**

Checks and Payments ☆

ALL RECORDS **VENDOR PAYMENT HISTORY**

Type: All Status: = Closed Payment Date: '1/1/2018' - '12/31/2020'

Vendor Name	Payment C		2020										Total	Total
	#	Total	2020 - Jan	2020 - Feb	2020 - Mar	2020 - Apr	2020 - May	2020 - Jun	2020 - Oct	2020 - Dec				
Aries Automotive										4,373.38		4,373.38	4,373.38	13,417.48
Arktak Networks	13,417.48													69,109.00
Automatic Data Processing Inc.	24,000.00	27,000.00	2,500.00	2,600.00	2,600.00	2,600.00	2,600.00	2,600.00	2,600.00	2,600.00			18,100.00	1,450.00
Bank of America		1,450.00												3,004,000.00
BlueLine Advertisements	904,000.00	1,200,000.00			900,000.00								900,000.00	94,165.00
Business Hardware	41,860.00	52,325.00												267,570.34
Cequent										267,570.34			267,570.34	267,570.34
Curt Manufacturing										334,560.39			334,560.39	334,560.39
Dewsoft Toy Supply	701,600.00	1,000,050.00		126,000.00	241,000.00			365,550.00	94,500.00				827,050.00	2,528,700.00
DongKoug Supply Company	850.00													850.00
Doug Brown & Brothers Inc	12,000.00	18,000.00	24,000.00										24,000.00	54,000.00
East COM Electronic Supplies	1,848,676.00	3,277,190.50	116,976.00	183,930.00	576,870.00	404,253.00	539,019.00	240,904.00					2,061,952.00	7,187,818.50
Edison Power	58,300.50	69,563.89		5,586.81	5,873.73	6,106.45	5,934.50	5,210.01	4,982.55				33,873.05	161,627.44
Empire BlueCross BlueShield	1,350,000.00	1,490,000.00	126,500.00	126,500.00	136,600.00	136,600.00	136,600.00	136,600.00	136,600.00	136,600.00			936,000.00	3,776,000.00
Etik Food Supplies	172,144.50	1,065,425.25			13,212.00		7,600.50	7,380.00					28,192.50	1,265,762.25
Exiles Indsysteme	83,167.52	73,695.44	50,000.00	5,263.96	10,527.92		5,263.96	5,263.96	5,263.96				81,583.76	218,446.72
Getit Done	100.00	485.00												585.00
Global Industrial Tools	1,804,377.29	2,509,639.85		183,211.85	448,264.88			535,223.45	177,999.77	28,999.99			1,373,699.94	5,687,717.08
Glonaus Food	37,500.00	13,750.00												51,250.00
Good Hardware Pte., Ltd.	1,795,963.40	4,154,418.10		372,771.70	1,856,120.00	305,608.10	265,262.90	566,768.30					3,366,531.00	9,316,912.50
Goto Vendor Inc	3,559,820.75	3,293,380.08		47,931.58				2,376.50	2,400.00	16,584.86	366.94		69,669.67	6,922,870.50



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Example 3: Vendor Payment History

1. Drag the field – **Vendor Name** to the Rows box, and change properties:
 - Width change from 100 to 250
2. Drag the field – **Payment Date** to Columns box (do this twice)
3. Change the properties – top one to Years, bottom one to Months
4. Drag the field – **Payment Amount** to the Values box
5. Top Filter Status – set to **Closed**, and set **Payment Date** range to length of desire

Drag in twice - Round top to Years, bottom one to Months



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Example 4: Gross Profit % by Item Class / Inventory Item

Fields	Rows	Values
Branch	Item Class	Margin %
Branch	Inventory ID	
Completed	Inventory Description	
Cost		
Customer		
Customer		
Customer Class		
Customer Class		
Date		
Inventory Description		
Inventory ID		
Item Class		

Columns
Date
Date

Sales Profitability Analysis

Date From: 1/1/2020 Date To: 12/31/2021

Customer Class: LOCAL - Domestic Customer

ALL RECORDS PROFIT PROFIT SALES PERSON PROFIT CUSTOMER

Drag column header here to configure filter

Item Class	Inventory	Inventory Description	2020				2021			Total
			2020 Q1	2020 Q2	2020 Q4	Total	2021 Q1	2021 Q4	Total	
ALLOTHER - -	SPECIALORD	Special or custom order	24.00			24.00				24.00
	CONPAPERST	Letter Paper Ream Standard		40.00		40.00				40.00
CONSUMER	CONPEN100	Pens - Box of 100		50.00		50.00				50.00
	CONPENC100	Pencils - Box of 100								57.14
	CONBABY1	South Shore Savannah Changing Table	35.25			35.25				34.84
CONSUMER	CONBABY2	Little Tikes Bold n Bright Table & Chairs	35.02	35.01		35.02				35.02
	CONBABY3	Grac Pack N Play with Newborn Napperstat	35.25	32.57		33.84				33.84
	CONCHAIR1	Caravan Canopy Recliner	33.02	33.02		33.02				33.02
	CONBOTTLE1	Eddy Insulated Bottle .5L	29.27	29.27		29.27				29.27
	CONHEARTM1	Polar Heart Rate Monitor	36.37	36.37		36.37				36.37
CONSUMER	CONTRAIN1	Stamina In-Motion Elliptical Trainer	36.36	36.36		36.36				36.36
	CONTRAMPL	Skywalker trampoline - 16ft round	36.36	36.36		36.36				36.36
	CONWEIGHT1	Bowflex Adjustable Dumbbells	36.36	36.36		36.36				36.36
	AALEGO500	Lego 500 piece set	54.65	52.99		53.77				53.77
	CONKID1	Kiddraft Nantucket Toybox	36.12	35.94		36.03				36.03
CONSUMER	CONKID2	Radio Flyer Interactive Riding Horse	36.26	36.13		36.19				36.19

GROSS PROFIT % BY ITEM CLASS / INVENTORY ITEM



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Example 4: Gross Profit % by Salesperson / Inventory Item

Fields	Rows	Values
Branch	Sales Pers.	Margin %
Branch	Inventory ID	
Completed	Inventory Description	
Cost		
Customer		
Customer		
Customer Class		
Customer Class		
Date		
Inventory Description		
Inventory ID		

Columns
Date
Date

Sales Profitability Analysis

Date From: 1/1/2020 Date To: 12/31/2021 Sales Person: Customer Class: LOCAL - Domestic Customer

ALL RECORDS PROFIT PROFIT SALES PERSON PROFIT CUSTOMER

Sales Pers	Inventory	Inventory Description	2020				2021			Total
			2020 Q1	2020 Q2	2020 Q4	Total	2021 Q1	2021 Q4	Total	
Eric Killian	Total		36.38	35.42		35.88				35.88
Jason Mender	Total		41.85	38.22		40.30				40.30
	AACOMPUT01	Acer Laptop Computer	50.07	50.01		50.04				50.04
	CONGRILL	Char-Broil Classic 480	36.35	36.38						8.38
	FOODCHOC	Hershey Chocolate Kisses 3.5 Lbs	23.15							3.15
	FOODCOKD12	Coca-Cola Diet Cans - 12 pack	37.83			37.83				37.83
	FOODCOLA12	Coca-Cola Cans 12 Count	44.52	44.76		44.64				44.64
	FOODDRAKE1	Drake's Devil Dogs 8 ct		12.63		12.63				12.63
	FOODDRAKE2	Drake's Yodels 10 ct		10.01		10.01				10.01
Jay Parker	FOODSUGAR	Sweet N Low Sugar 12pk	50.00	50.00		50.00				50.00
	FOODTEA06	Liptons Cold Brew Tea Bags 6 Pack	34.23			34.23				34.23
	TEE-GRE-L	Tee Shirts Grey Large	80.00			80.00				80.00
	TEE-GRE-M	Tee Shirts Grey Medium	80.00			80.00				80.00
	TEE-GRE-S	Tee Shirts Grey Small	80.00			80.00				80.00
	TEE-GRE-XL	Tee Shirts Grey Extra Large	80.00			80.00				80.00
	TEE-WHL	Tee Shirts White Large	80.00			80.00				80.00

GROSS PROFIT % - SALESPERSON / INVENTORY ITEM



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Example 4: Gross Profit % by Customer / Item Class / Item

Fields	Rows	Values
Branch	Customer	Margin %
Branch	Item Class	
Completed	Inventory ID	
Cost		
Customer		
Customer		
Customer Class		
Customer Class		
Date		
Inventory Description		
Inventory ID		
Item Class		

Columns
Date
Date

Sales Profitability Analysis

Date From: 1/1/2020 Date To: 12/31/2021

Customer Class: LOCAL - Domestic Customer

Completed transactions only:

ALL RECORDS PROFIT PROFIT SALES PERSON PROFIT CUSTOMER

Drag column header here to configure filter

Customer	Item Class	Inventory ID	2020				2021			Total
			2020 Q1	2020 Q2	2020 Q4	Total	2021 Q1	2021 Q4	Total	
AACUSTOMER	Total		34.19	40.69	59.17	39.02				39.02
ACTVESTAF	Total		100.00	100.00						100.00
ALPHABETLD	Total		100.00	100.00						100.00
ANTUNSWEST	Total		100.00	100.00		100.00				100.00
APOSTELSCH	CONHEARTM1		36.37	36.37		36.37				36.37
	CONSUMER -200-F CONTRAMPL		36.36	36.36		36.36				36.36
	CONWEIGHT1		36.36	36.36		36.36				36.36
	CONSUMER -300-TOY CONMITT		35.61	35.78		35.68				35.68
	ELECCOMP -400-COM AACOMPUT01		50.00	50.03		50.01				50.01
	INDEQUIP -100-COMM INDOVEN1		14.66			14.66				14.66
	PMLABOR -- CONSULTING		60.00			60.00				60.00
	SOFTWARE -- SOFTSAAS1		100.00	100.00		100.00				100.00
	SOFTWARE -- SOFTSAAS2		100.00	100.00		100.00				100.00
	WIDGETS -- WIDGET01			21.59		21.59				21.59
	Total		52.15	52.08		52.11				52.11
ARTCAGES	Total		61.13	38.43		48.64				48.64

GROSS PROFIT % BY CUSTOMER / ITEM CLASS / ITEM



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Pivot Table – Overview

For More Information – please contact support@4acc.com and we would be happy to review these new features.

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