

Espresso Customer Workbench

SYSPRO 8

Reference Guide

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Espresso Customer Workbench

Exploring

Where does it fit in?

The **Espresso Customer Workbench** includes various customer components that lets you view customer data and add or update transactions within one application without having to leave the current application.

Using Tasks

Using the Espresso Customer Workbench app

The screenshot displays the 'Information' screen for customer ID 0000001. The interface includes a navigation menu on the left with options like 'New Activity', 'New Contact', and 'New Sales Order'. The main content area shows contact details, address information (both sold to and ship to), and geolocation data. A 'Get Directions' button is visible below the geolocation data.

Menu Item	Field	Value
Information	Customer Name	Bayside Bikes
	Telephone	206-555-4562
Best price details	Contact	Karen Saunders
Order management	Sold To Address	
	Building	P O Box 8
Back order details	Street	Bayside North
	Locality	
Invoice details	City	Seattle
	State	WA
Activity information	ZIP	98111
	Country	USA
Contacts	Geolocation	0.000000, 0.000000
	Ship To Address	
	Building	3 Beach Road
	Street	Bayside North
	Locality	
	City	Seattle
	State	WA

You can access multiple applications without having to leave the current application.

The following information is visible:

- Best price details
- Order management (including sales order commitment details)
- Back order details
- Invoice details (including invoice ageing analysis and invoice payments)



- Activity information
- Contacts

You can add or maintain the following transactions:

- Sales orders
- Activities
- Contacts

Hints and Tips

- This application performs best when used on a desktop or tablet.
- This application should be used in **SplitView** mode in Espresso.



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