

Espresso Customer Workbench

SYSPRO 8

Reference Guide

Published: February 2019



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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 bar at the top with a back arrow, the app name 'orkbencr', and a settings gear icon. A left-hand menu lists various sections: Information, Best price details, Order management, Back order details, Invoice details, Activity information, and Contacts. Below the menu are three prominent green buttons: 'New Activity', 'New Contact', and 'New Sales Order'. The main content area is divided into 'Contact information' and 'Sold To Address' sections. The 'Contact information' section includes fields for Customer Name (Bayside Bikes), Telephone (206-555-4562), and Contact (Karen Saunders with a profile icon). The 'Sold To Address' section includes fields for Building (P O Box 8), Street (Bayside North), Locality, City (Seattle), State (WA), and ZIP (98111). Below these fields are two green buttons: 'Get Directions' and 'Go to Map'. A 'Ship To Address' section is also visible at the bottom, with fields for Building (3 Beach Road), Street (Bayside North), Locality, City (Seattle), and State (WA).

| Section | Field | Value |
|---------------------|---------------|--|
| Contact information | Customer Name | Bayside Bikes |
| | Telephone | 206-555-4562 |
| | Contact | Karen Saunders |
| Sold To Address | Building | P O Box 8 |
| | Street | Bayside North |
| | Locality | |
| | City | Seattle |
| | State | WA |
| | ZIP | 98111 |
| | Country | USA |
| Geolocation | | 0.000000, 0.000000 |
| | | Get Directions Go to Map |
| 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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