

ASWi HAPPENINGS

ASWi Customer Newsletter

In this issue:

- Day Spotlight
- Dad Jokes of the Day
- Acumatica User Group Meeting
- Acumatica 2023 R1 | Core Module Features
- Sales 101
- Events, Blogs, Movies
- Webinars, Community

Happenings Purpose

The purpose of a newsletter is an opportunity for the ASWi team to provide you and the rest of our clients with information on all the new ASWi and Acumatica related things (or “happenings”) that you may not otherwise be aware of.

Please feel free to share this newsletter with any/all of your team. Please let me know if anyone on your team who would like to be added to the mailing list for the next issue and removed.

International Earth Day

As the world’s largest environmental movement, there are over 1 billion people involved with Earth Day each year across almost 200 countries.

As a day of action, Earth Day aims to promote environmentalism and to teach about the ecosystems in which we live and its impact on our health, access to food and water, safety and livelihoods.



To get involved, along with choosing to make conscientious changes such as recycling more, using renewable fuel and conserving water, you can attend a [local Earth Day festival or event near you](#) and volunteer to clean up local parks on clean-up days.

Dad Jokes | Earth Day edition

Q: Why did the leaf go to the doctor?

A: It was feeling green.

Q: Why are people always tired on Earth Day?

A: Because they just finished a March?

Q: How can you tell the ocean is friendly?

A: It always waves.

Q: Why did the sun go to school?

A: To get brighter.

Q: How do you cut a wave in half?

A: With a sea-saw.

Q: What did the Live Oak wear to the Earth Day pool party?

A: Swimming trunks.

Q: What did the ground say to the earthquake?

A: You crack me up.

Q: What’s the difference between “weather” and “climate”?

A: You can’t weather a tree, but you can climate.

Q: What kind of plan can you grow on your hand?

A: A palm tree.



Acumatica User Group



Acumatica User Groups | South Texas Meeting - April 27

The inaugural South Texas Acumatica User Group Meetup is scheduled for **April 27th, from 11:00 am to 2:00 pm**. It will be held at the offices of MCA Communications at **483 W 38th Street, Houston, TX 77018**.

Agenda

Start	Topic(s)
11:00 am	Welcome, South Texas AUG Board introductions and Overview.
11:20 am	Acumatica Usability Cases: Microsoft Power BI, BigCommerce.
Noon	Working Lunch.
12:30 pm	Acumatica 2022R2 Overview and Product Roadmap.
1:00 pm	Group member introductions.
1:30 pm	South Texas Acumatica User Group Roundtable open forum.

Who's Invited

Any and all existing and prospective Acumatica customers, independent of your location, are welcome, invited, and encouraged to attend this Meetup.

How to Register for the Event

You can register for the event [here](#).



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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

2023 R1 Themes



Empower Users with Exceptional Usability



Evolve your Business with an Intelligent Platform



Dominate Vertical Segments with Industry-Focused Functionality

Financials

Reporting

- 1099 updates (2022 R2)
- AR Aging by Project Report

Usability

- Copy subaccount to next line
- Change account type after implementation
- Tax only lines on AP bills
- Company specific consolidation across tenants

Data Integrity

- Financial periods for reactivated companies
- Tax zone validation based on address
- Sync GL and Fixed Asset periods

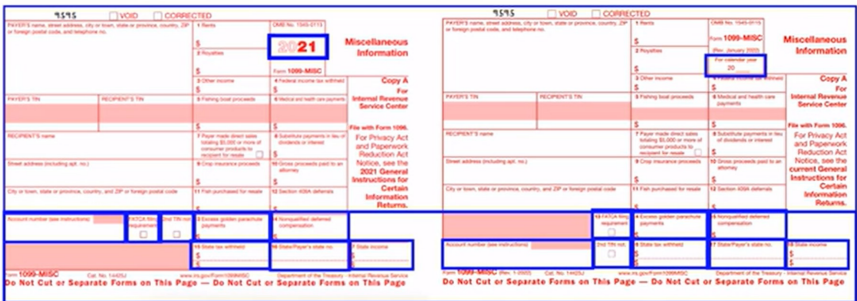
Other Enhancements

- Streamlined batch payment processing
- ACH file configuration

IRS Changes in 1099-MISC

In the upper part, only the Tax Year displayed has changed

In the lower part, several fields have position and number changes



Applying IRS Changes in Accounts Payable Preferences

1099 Box	Description	Minimum Amount	Account Report
MISC01	Rents	600.0000	52000
MISC02	Royalties	10.0000	51800
MISC03	Other Income	0.0000	
MISC04NEC04	Federal Income Tax Withheld	0.0000	
MISC05	Fishing Boat Proceeds	0.0000	
MISC06	Medical and Health Care Paymte.	0.0000	
MISC07NEC02	Direct Sales	5,000.0000	
MISC08	Substitute Payments in Lieu of D.	0.0000	
MISC09	Crop Insurance Proceeds	0.0000	
MISC10	Gross Proceeds Paid to an Attri...	0.0000	
MISC11	Fish Purchased for Resale	600.0000	
MISC12	Section 409A Deferrals	0.0000	
MISC14	Excess Golden Parachute Paym...	0.0000	
MISC15	Nonqualified Deferred Compens...	0.0000	
MISC16	State Tax Withheld	0.0000	
MISC18	State Income	0.0000	
NEC01	Nonemployee Compensation	600.0000	51250

1099-MISC Tax form Box (Display Value)

Field Description	Previous (2021)	New (2022)
Excess Golden Parachute Payments	MISC13	MISC14
Nonqualified Deferred Compensation	MISC14	MISC15
State Tax Withheld	MISC15	MISC16
State Income	MISC17	MISC18

In Accounts Payable Preferences form, the numbers of 1099 Boxes were changed based on the changes in the MISC-1099 form, but the fields descriptions remained the same.

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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

AR Aging by Project

Template: X

Default Shared

Report Format: **Detailed**

Company/Branch: Summary

Project: **Detailed**

Project Manager: Detailed with Retainage

Customer Class:

Customer:

Age as of Date: 3/12/2023

AR Aging by Project

Type your query

AR Aging by Project (Detailed)

Company/Branch: PROCWHOLE Page: 1 of 12
 Project: X Aged On: 3/12/2023 Date: 3/12/2023 1:44 PM
 User: admin admin

Project ID	Description	Project Manager									
Statement Cycle	Last Statement Date	Description									
ECM	12/31/2013	End of Month									
Customer			Customer Name								
ABCSTUDIOS			ABC Studios Inc								
Doc. Type	Ref. Nbr.	Customer Ref./ Orig. Ref. Nbr.	Branch	Doc. Date	Due Date	Current	1 - 10 Days	11 - 30 Days	31 - 60 Days	Over 60 Days	Balance
Invoice	AB011852	ABCSTUDIOS20	PROCWHOLE	12/13/2022	1/12/2023	0.00	0.00	0.00	138,779.00	0.00	138,779.00
Customer Total:						0.00	0.00	0.00	138,779.00	0.00	138,779.00
Customer			Customer Name								
ABARTENDE			USA Bartending School								
Invoice	AB011786	ABARTENDE20	PROCWHOLE	12/15/2022	1/14/2023	0.00	0.00	0.00	29,644.00	0.00	29,644.00
Invoice	AB011729	ABARTENDE20	PROCWHOLE	12/31/2022	1/30/2023	0.00	0.00	0.00	160,000.00	0.00	160,000.00
Customer Total:						0.00	0.00	0.00	189,644.00	0.00	189,644.00

AR Aged Period-Sensitive (by Project)

Template: X

Default Shared

Report Format: Detailed

Company/Branch: PROCWHOLE - Products Wholesale

Financial Period: 03-2023

Project: X

Project Manager:

Customer Class:

Customer:

AR Aged Period-Sensitive (by Project)

Type your query

AR Aged Period-Sensitive (by Project, Detailed)

Company/Branch: PROCWHOLE Page: 1 of 12
 Project: X Financial Period: 03-2023 Aged On: 3/12/2023 Date: 3/12/2023 1:44 PM
 User: admin admin

Project ID	Description	Project Manager									
Statement Cycle	Last Statement Date	Description									
ECM	12/31/2013	End of Month									
Customer			Customer Name								
AACUSTOMER			Aka Ace								
Doc. Type	Ref. Nbr.	Customer Ref./ Orig. Ref. Nbr.	Doc. Date	Due Date	Current	1 - 10 Days	11 - 30 Days	31 - 60 Days	Over 60 Days	Balance	
Invoice	AB011786	AACUSTOMER2	12/13/2022	1/12/2023	0.00	0.00	0.00	0.00	4,787.72	4,787.72	
Invoice	AB011774	AACUSTOMER2	12/16/2022	1/15/2023	0.00	0.00	0.00	0.00	276,880.80	276,880.80	
Customer Total:						0.00	0.00	0.00	0.00	281,668.52	281,668.52
Customer			Customer Name								
ABARTENDE			USA Bartending School								
Invoice	AB011786	ABARTENDE20	12/15/2022	1/14/2023	0.00	0.00	0.00	0.00	29,644.00	29,644.00	
Invoice	AB011729	ABARTENDE20	12/31/2022	1/30/2023	0.00	0.00	0.00	0.00	160,000.00	160,000.00	
Customer Total:						0.00	0.00	0.00	189,644.00	289,644.00	

Usability

- Copy subaccount only when next line is income/expense or asset/liability
- Add option to change type of account
- Tax agency bills with tax and taxable lines
- Consolidate data by company

ASWi Customer Newsletter

Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules Copy Subaccount on the Journal Entry Form

Problem statement

Currently, when users enter transaction on the Journal Transactions form, if Use Default Subaccount = TRUE, the system always defaults subaccount to the value specified on GL Preferences form. If Use Default Subaccount = FALSE, the system copies the subaccount from the previous line- which might not be correct.

Solution

Now subaccount is left empty if Use Default Subaccount = FALSE. The user enters a value in place of NULL and in the following line, that subaccount value is copied. This saves key strokes as well as time.

Journal Transactions

Change Account Types

Problem Statement

With over 90 support cases over the years, account types have been setup incorrectly, most often during implementations. And after transactions are released (or posted), it is no longer possible to change the account type on the UI. The next step is to create a support case. A script (or data fix) is then run to correct account type and make other necessary changes.

Solution

Account Type can now be changed on the UI:

- Income to Expense (vice versa)
- Asset to Liability (vice versa)

Note

- Only Financial Supervisor can make such changes
- As part of the process, the system recalculates balances for projects and applicable accounts
- Retained earnings and Net income account types cannot be changed

Tax Agency Bills

Problem Statement

It was not possible to enter in one form- AP Bills and Adjustments, both taxable lines and lines that were 100% tax. Instead, two forms had to be created:

- AP Bills and Adjustments form - to enter regular expense lines
- Tax Bills and Adjustments form – 100% Tax lines (aka direct entry tax lines)

Waybill	Description of Goods	Entry Date	Entry No	Origin / Sender	Destination / Receiver	Pieces	Weight	
14994881	APPAREL	13/05/18				1	15.90	
Analysis of Charges				Total Amount (Excl. GST)	GST	Rate	GST	Total Amount (Incl. GST)
DUTY, Taxes and Regulatory Charges				151.76	GST	0.0	0.00	151.76
GST ON IMPORTATION				84.87	GST	0.0	0.00	84.87
ANY GOV'T CHARGES				83.00	GST	0.0	0.00	83.00
DHL Charges								
DISBURSMENT FEE				20.00	GST	0.0	2.00	22.00
Total				439.63			2.00	441.63

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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules Tax Agency Bills

Solution

- Ability to create documents with direct-entry tax lines and regular expense lines **on one data-entry form** was introduced for the forms below:
 - AP Bills and Adjustments Form (AP301000)
 - Cash Purchases Form (AP304000)
 - Landed Cost Form (PO303000)

Note

- 100% tax lines will be referred to as "direct-entry" tax going forward
- Taxable amount will be zero for direct-entry tax lines
- Other taxes will not be applied to direct-entry tax lines
- Direct-entry tax lines can be processed as pending VAT

Taxes
GST100 - GST 100% Tax

TAX SETTINGS

Tax ID: GST100 - GST 100% Tax
 Description: GST 100% Tax
 Tax Type: VAT
 Partially Deductible VAT
 Reverse VAT
 Statistical VAT
 Include in VAT Exempt Total
 Include in VAT Taxable Total
 Pending VAT
 Direct-Entry Tax

Calculation Rule: Inclusive Line-Level
 Cash Discount: Does Not Affect Taxable Amount
 Exclude from Tax-on-Tax Calculation
 Tax Agency: CANADASC - British Columbia Ministr
 Not Valid After:

TAX SCHEDULE

Start Date	Tax Rate	Min. Taxable Amount	Max. Taxable Amount	Reporting Group	Group Type
1/1/1900	100.000000	0.0000	0.0000	Input Tax (purchases)	Input

Bills and Adjustments
Bill 003601 - DHL Express

Type: Bill
Reference Nbr: 003601
Status: On Hold
Date: 3/14/2023
Post Period: 03-2023
Vendor Ref: Test

Vendor: DHL - DHL Express
Location: MAIN - Primary Location
Currency: USD 1.00
Terms: 300 - 30 Days
Due Date: 4/15/2023
Cash Discount: 4/15/2023

Detail Total: 404.87
Discount Total: 0.00
VAT Taxable Total: 0.00
VAT Exempt Total: 0.00
Tax Total: 389.87
With Tax: 0.00
Balance: 409.87
Cash Discount: 0.00

TAXES

Branch	Transaction Descr.	Tax Category	Unit Cost	Ext. Cost	Amount	*Project	*Account	Description
PROCWHO...	GST on Importation	GST100	0.00	384.87	384.87	X	60000	Purchase expense
PROCWHO...	Disbursement Fee	TAXABLE	0.00	20.00	20.00	X	60000	Purchase expense

TAXES

*Tax ID	Tax Rate	Taxable Amount	Tax Amount	Deductible Tax Rate	Expense Amount
CAGST	10.000000	20.00	2.00	100.000000	0.00
GST100	100.000000	0.00	384.87	100.000000	0.00

Changes in GL Consolidation

Problem Statement

Only a company that had **Without Branches** type could be specified as a consolidation source. And although a user was able to specify a branch of a company **With Branches Requiring Balancing** type as a consolidation source, the consolidation process couldn't be launched

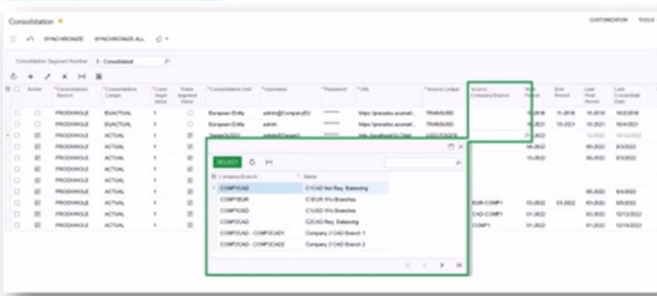
Solution

Now, a company of any type can be selected as a consolidation source. And only a branch of a company **With Branches Requiring Balancing** type can be specified as a consolidation source

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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules GL Consolidation (GL103000)



GL consolidation process is re-implemented using REST technology which replaced SOAP protocol

- GL Consolidation between two 2023R1 Acumatica versions will work without any additional setup, but the process won't work between two different versions of Acumatica ERP one of which supports REST and the other – SOAP.

Data Integrity Enhancements

- Generating financial periods for reactivated companies
- Enhancing tax zone validation
- Synchronizing Fixed Asset periods in the Posting Book with GL periods in the Master Calendar

Financial Periods for Re-activated Companies

Problem Statement

- If a company is inactivated and then activated again, periods cannot be created in the Master Financial Calendar (GL201000 form)

Solution

- Now if a company is re-activated periods are automatically generated

Note

- The logic of the Centralized Period Management and Multiple Calendar Support was adjusted to support these changes

Tax Zone Validation

Problem statement

In 2022 R2 Tax Zone addresses were improved and it became possible to associate tax zones with countries, or states, or postal codes. During data entry, tax zone were automatically selected based on a document's address. However, the system did not validate that only one tax zone should be associated with the same country, state, or postal code. This in turn, created data ambiguity.

Solution

The system no longer allows tax zone configuration that results in multiple tax zones associated with the same country, state or postal code.

Synchronize Fixed Assets posting book periods with GL Master Calendar

Problem statement

If users delete financial periods or modify the period length in the Master Financial Calendar, the periods in the fixed asset posting book become inconsistent with the general ledger periods. This leads to incorrect periods being used in fixed asset transactions, and in some cases, depreciation being calculated incorrectly

Solution

On the Book Calendars (FA304000) form a new action has been created- *Synchronize GL and FA periods*. This action contains the following stipulations and business logic:

- The synchronization cannot be performed if there are FA posted transactions in the periods that are out of synch. If there are FA unposted transactions in these out of synch periods, they will need to be deleted. Then the synchronization can be performed
- The synchronization recreates FA periods starting from the first period that is out of sync, copies existing GL periods, and creates new FA periods using the GL calendar template, to the last year in the FA posting book, plus one

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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

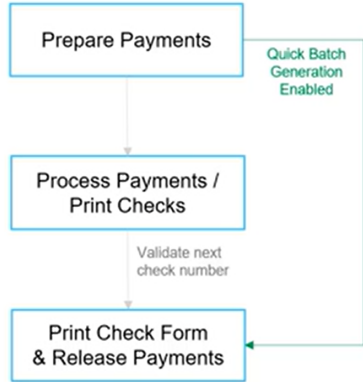
Generate Batches on the Prepare Payments Form

Benefits:

- Simplified workflow for faster payment batch processing

Notes:

- Set option by payment method and cash account
- Setting available only if payment method can be used in AP
- Bypass Process Payments / Print Checks form



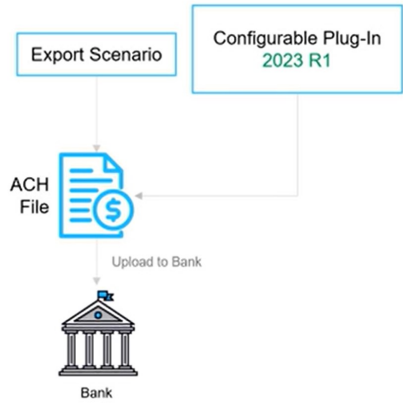
UI- Based ACH File Configuration

Benefits:

- Replace export scenarios with easy-to-configure menus

Notes:

- Support for *addenda records* (Type 7) required by some banks
- Easier to set *Company Identification* field on the ACH file
- Ability to set logic for the *File ID Modifier* field
- Better error handling when exporting batches
- New checking/savings field on the vendor records is used in the ACH output



Delegate and Reassignment of approvals

Benefits

- Ensure that assigned tasks get approved even when the original approver is temporarily unavailable

Features

- Temporarily assign tasks to others when out-of-office.
- Re-assign several tasks related to an employee who has left the company.

Enhanced task management

Benefits

- Efficient task management

Features

- Easily add reminders related to the on-screen entity
- Easily navigate and manage through tasks and reminders from a single location

Improve quote to customer process

Benefits:

- Quickly create Sales Orders for prospects (Business Accounts) from an opportunity

Notes:

- Easily create a sales order for a contact (sub type: Business Account) from an opportunity
- Easily convert quote to cash



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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

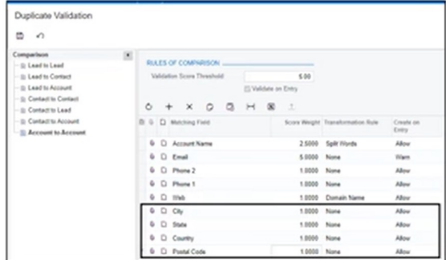
Add address fields to de-duplication

Benefits

- Enrich the deduplication engine to ensure unique leads, contacts, and accounts

Features

- Extend and easily manage the address values within the deduplication engine



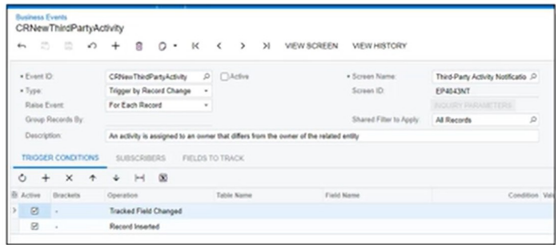
Reminder Templates and Notifications

Benefits

- Keep your workforce notified with email notifications

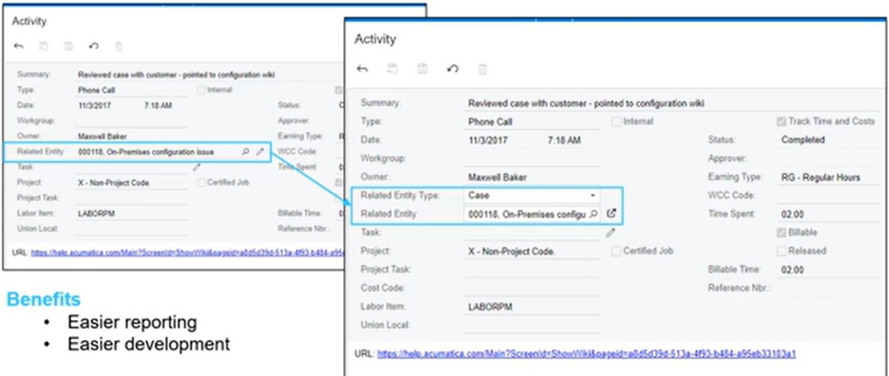
Features

- Create email notifications for new task and activity creation and assignment



Event ID	Description
CRNewTask	A new task with the Open or Processing status has been assigned to an owner who was not the creator.
CRNewActivity	A new activity has been assigned to an owner who was not the creator.

Split related entity selector on activity screen



Benefits

- Easier reporting
- Easier development

Integration and Localization

Integration

- Avalara Use Tax on AP Bills
- Tax exemptions at the document level
- Shipping Carrier improvements
 - Bill-To and Sold-To options
 - Freight cost on commercial invoice
 - Tracking numbers for return labels
- Microsoft Teams to Core*
- Gmail integration**

Localization

- Canadian T5018 history and validation report
- Canada localized reports

* Experimental feature

** Implemented as a customization project

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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

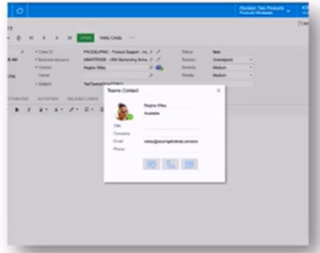
Microsoft Teams Integration Experimental Feature

Benefits

- Increased collaboration and communication from Acumatica to Microsoft Teams

Features

- View status of a Teams contact from Acumatica
- Start a call, chat, or schedule meetings from Acumatica
- Create business events and automate notifications from Acumatica to a Teams channel or contact
- Share Acumatica record with a Teams channel or contact
- Import shared files from Teams in Acumatica records



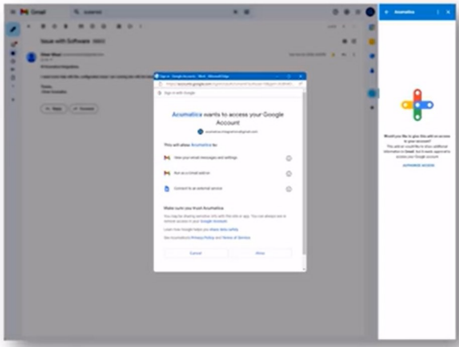
Gmail Integration Customization

Benefits

- Elevate Acumatica CRM experience from Gmail

Features

- Create new or update existing contacts
- Create leads and opportunities
- Create cases
- Log email as activity
- Create an AP Bill using AP Document Recognition



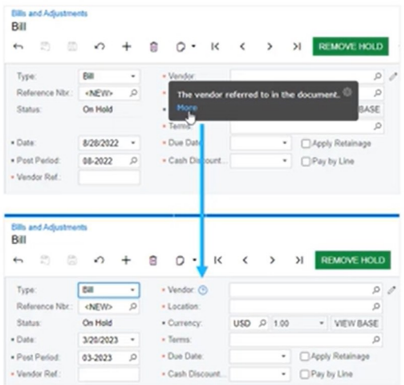
Infotip Enhancements

Benefits:

- Less intrusive links
- Grid field infotips available by clicking the header – the infotip icon appears in the dialog box.

Features and Notes:

- Small question mark appears after hovering over a label for 1.5 seconds.
- Removed setup options on user Profile
- Limitations:
 - Not available on GIs, reports, dialog boxes and their elements, UDFs, custom fields
 - Not available for elements on the title bar, form toolbar, and table toolbar.



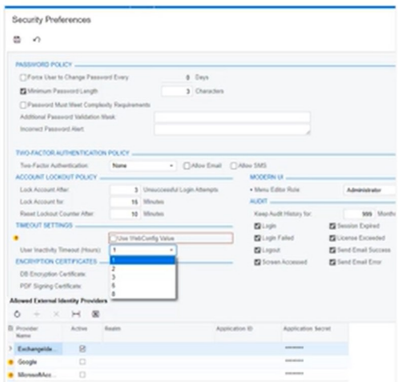
Configure User Activity Timeout

Benefits:

- Customer administrators can set user inactivity timeout without changing web.config.

Features and Notes:

- Added User Inactivity Timeout to Security Preferences
- Available values:
 - 15, 30, 45, 60, 90 minutes
 - 2, 3, 4, 5, 6, 7, 8 hours
- Migration
 - Existing Web.config value applied and displayed in the user activity timeout field
- Web.config
 - `<formsAuth loginUrl="Frames/Login.aspx" timeout="60" />`



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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

Delete Tenants and Snapshots in Batches

Benefits:

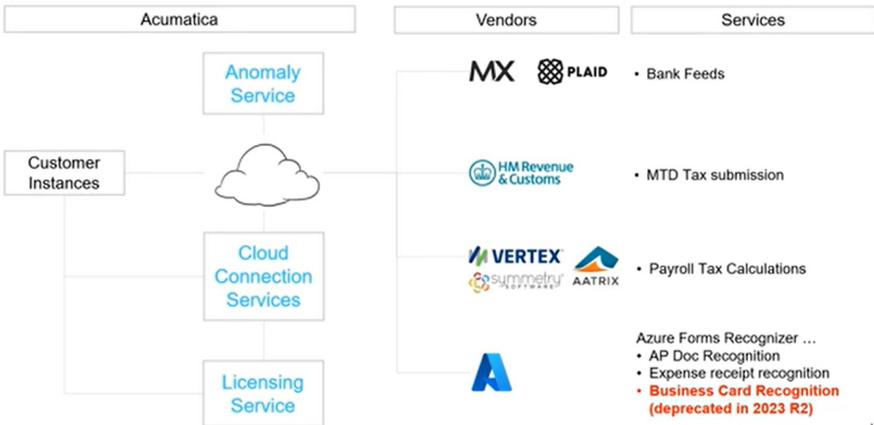
- Avoid impacting users through better management of resource intensive tasks
- New screen with scheduler for off-hours processing

Features and Notes:

- Tables deleted in several transactions
- Tenants screen redirects to Delete Snapshots and Tenants screen
- Deletion status added

Action:	Snapshot	Description	Visibility	Size on Disk (MB)	Created On	Version
☐ Delete Tenant	☐ Delete Snapshot					
☐ Com Delete Orphaned Snapshot		SalesDemo - 2022Dec	Access Tenants	88.56	3/14/2023 5:28 PM	23.093.0227
☐ Company_2023-01-18_13-47		Summit - Prep02	Company		1/16/2023 1:48 PM	23.093.0217
☐ Company_2023-01-18_13-43		Summit - Prep01	Company		1/16/2023 1:44 PM	
☐ Company_2023-01-16_19-09		SalesDemo - 2022Dec	Access Tenants		1/16/2023 7:18 PM	23.093.0217

Cloud Connection Service



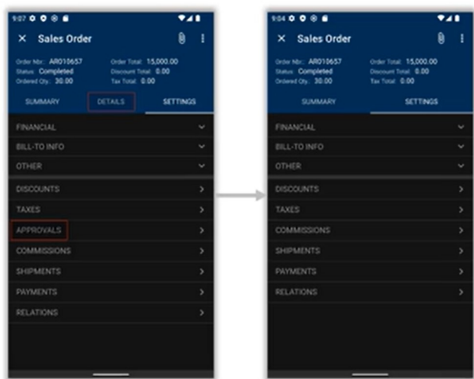
Hide tabs and containers based on access rights or feature restrictions

Benefits:

- Mobile users do not see items they cannot click.

Features and Notes:

- Do not show unlicensed features on the mobile device
- Do not show features which the user does not have rights to see
- Containers and tabs follow the same visibility settings as the browser interface



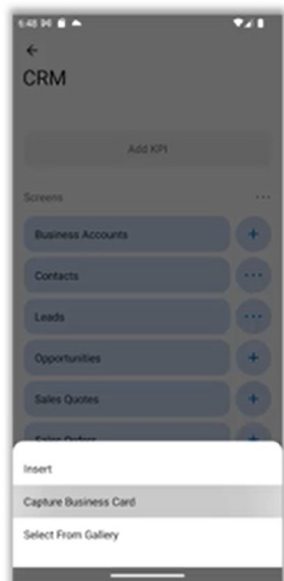
Deprecate Business Card Recognition

History:

- Introduced in 2021 R1, but not widely adopted or used.

Future:

- 2023 R1 will be the last release which supports this feature
- In 2023 R2 the feature will no longer appear in the software and will no longer be supported for prior releases



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Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

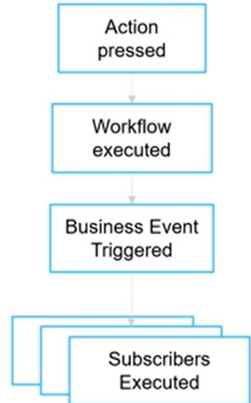
Trigger Business Events using an Action

Scenario:

- Trigger a business event when user (or system) executes an action

Features / Benefits:

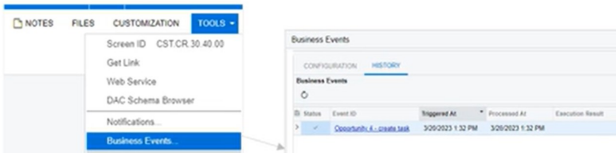
- Trigger using any screen action
- Triggers after all transactions and updates complete
- Set trigger conditions, but they are evaluated until the action is taken
- More efficient back-end processing (no messaging queue)



Business Event History

Benefit:

- Simplify ability to see the document linked to the business event



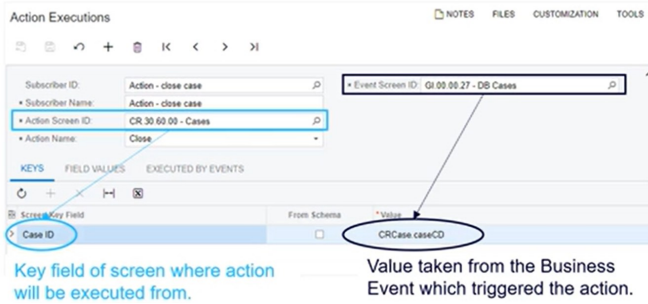
Features:

- Open History of a document directly from the Tools menu
- Link to a **related entity** from Business Event History screen

Action Subscriber for Business Events

Benefit:

- Execute an action without having to create an import scenario

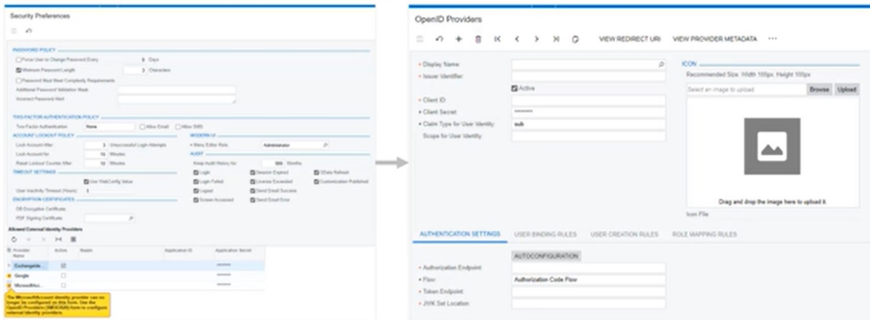


Features:

- Fire an action form any screen (does not have to be the screen that triggered the business event).
- Set field values of dialog box (if applicable) or other field values.

Replace PXOAuth2Client with OpenID

Single Sign On using the PXOAuth2Client is not supported in .NET core, customers should move to the Open ID Connect provider.



Diagnostic Tool Improvements

Benefit:

- Easier for customers to communicate issues to Acumatica's Support Team

Features:

- Create memory dumps from the UI
- Trace page improvements
- Submit Logs improvements

ASWi HAPPENINGS

ASWi Customer Newsletter

Acumatica Cloud ERP 2023 R1 Spotlight | Core Modules

Archiving Old Documents

Benefits:

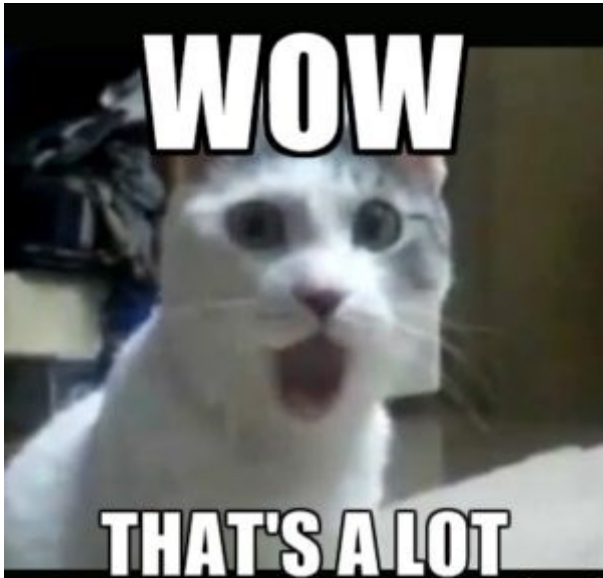
- Improve system performance
- Simplify user search results

Notes:

- New Archive Policy screen
- Archived documents not included in queries (inquiries, lookups, etc.)
 - Override option on inquiries, reports
- Open archived documents using a direct link from another document or by specifying key values
- Implemented screens
 - Sales Orders, Shipments
- Does not reduce storage space

Order Type	Customer	FDIAGRI - Agrilink Food	Ordered Qty	475.00
Order Nbr: 001453	Location: MAN - Primary Location	Contact	Discount Total	0.00
Status: Completed	Currency: USD 1.00	Project: X - Non-Project Code	VAT Exempt T.	0.00
Date: 10/6/2013			Tax Total	0.00
Requested On: 10/6/2013			Order Total	12,089.25
Customer Ord.				
External Ref.	Description: Food Order			

Branch	Inventory ID	Free Item	Warehouse	Line Description	UOM
PRODHOLE	ED00081EAD		RETAIL	Hot Dog Buns 8 PK (12per pack)	EA
PRODHOLE	ED00020E26		RETAIL	White Potato Chips 1.25oz Bags / 36PK	EA
PRODHOLE	ED00050T00G		RETAIL	Ball Park Beef Franks 3bs 2 PK	EA



April 22, 2023

HAPPENINGS

ASWi Customer Newsletter

Sales 101 | One Great Sales Tip

By Cotter Cunningham, RetailMeNot founder

Question: *"I'm a new sales leader. Do you have one great tip for me?"*

Congrats! Sales is the engine in most businesses.

Allow me a quick story. I learned an early lesson in this from my father-in-law, the consummate, lifelong salesperson.

He asked me about a mutual friend who had recently taken a job in sales. As a newly minted MBA, I'm sure I wrinkled my nose and frowned at the thought. "Ugh. Sales!" His reply—which I remember 30-plus years later—was something like, "Don't kid yourself. Every job sells!" And he was right.

I initially worked in M&A for a large company. Gotta sell your ideas to the CFO. I then went into advertising, where I literally sold new work to our clients every day. I then went to work at a web publisher where we all sold anything we had just to try and stay afloat. And as CEO, you are often the closer. "Everyone sells!" Kenny, 1992!

Back to your question.

If you asked 100 CEOs this, I suspect you would get 100 different answers.

Here's mine. People do what you pay them to do, so focus a lot of your energy on your sales comp plan. Pay special attention to the potential outcomes.

Paying \$X per new account opened? Sounds great, right? Get ready for a lot of new accounts. But they may all be small, though, because small accounts are much easier to open than big ones.

What about if you cap commissions at a maximum amount for the quarter? OK, but prepare for salespeople to push sales into the new quarter once they hit the maximum. Etc. Etc.

Performance usually follows payment.

As you develop your sales compensation plan, definitely think about the potential pitfalls. And there is almost always a pitfall.

Ask experienced sales leaders in your industry how they structure their plans. If you are creating a brand-new plan, consider one shorter than a year—or one that allows adjustments (which salespeople hate, but...).

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Movies of Note

Date	Movie
4/21	Acumatica Acumatica Summit 2023 - Highlights
4/21	BigCommerce Migrating from Adobe Commerce (Magento)
4/21	OrangeKloud Offline Field Service Mobile App for Acumatica

Acumatica Webinars

Date	Time	Webinar
4/25	1:00 pm CT	Automated Inventory and Order Management with Acumatica Distribution Edition
4/26	1:00 pm CT	CRM: Best Practices and Future Vision
4/27	1:00 pm CT	Why Acumatica Cloud ERP Outshines Sage Intacct

Blogs

Date	Article
4/21	ASWi ITAR Compliance for Acumatica Cloud ERP based solutions
4/21	Acumatica Investing in Our Planet on Earth Day and Beyond
4/18	Acumatica Acumatica 2023 R1: Dominate Your Vertical

Acumatica Community Discussions of Note



Thread
Breakout the sum of different Document Types on Invoice
Release multiple AP or AR invoices from Hold at the same time
Journal Entry error
AR Payment application
Prioritize loading extensions on a base graph

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Calendar of Events

Date	Event/Activity	Notes
5/10 - 12	AICPA CFO Conference	Salt Lake City, UT. Register Here.
6/14 - 15	Retail Innovation Conference	McCormick Place, Chicago, IL. Register Here.
6/21 - 23	CICPAC Annual Conference	Chicago, IL Register Here.
7/15 - 19	CFMA Annual Conference	Aurora, CO Register Here.
7/30 - 8/1	RetailNOW 2023	Orlando, FL More Info.
9/11 - 13	Pack Expo International 2023	Las Vegas More Info.
9/11 - 14	FABTECH 2023	Chicago, IL More Info.
9/18 - 20	PROCORE Groundbreak	Chicago, IL More Info.
10/31 - 11/3	SEMA 2023	Las Vegas, NV

ASWi | Our Values, Mission & Focus



Provide Substantial Value that's sustainable, scalable & Systemic

