

ASWi HAPPENINGS

ASWi Customer Newsletter

In this issue:

- Day Spotlight
- Dad Jokes of the Day
- Acumatica ISV add-on
- Acumatica 2023 R1 | Commerce Features
- Sales 101
- Events, Blogs, Movies
- Webinars, Community

Happenings Purpose

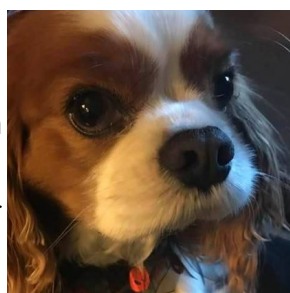
The purpose of a newsletter is an opportunity for the ASWi team to provide you and the rest of our clients with information on all the new ASWi and Acumatica related things (or “happenings”) that you may not otherwise be aware of.

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.

National Adopt a Shelter Pet Day

According to the ASPCA, about 4.1 million cats, and dogs are adopted from shelters each year.

One of these adopted pets is Gibbs, our Marketing Intern who is pictured on the right.



HOW TO OBSERVE ADOPT A SHELTER PET

- Visit a shelter today and consider adopting.
- Remember to spay and neuter your fur babies.
- For more info on adoption, visit the Humane Society or your local shelter.
- Share pics of your adopted pet on social media using #AdoptAShelterPetDay.
- Volunteer at a local shelter by providing the animals with exercise, companionship and socialization.

Dad Jokes | Pets edition

Mom: Can you put the dog out?

Dad: I didn't know it was on fire.

Son: Can our dog jump higher than our hedge?

Dad: Of course, our hedge can't jump at all.

Q: What is the loudest pet you can get?

A: A trum-pet.

Q: What do you call a dog that can do magic?

A: A labracadabrador.

Q: What do vegan dogs eat?

A: Bark.

Q: What noise do Icelandic dogs make?

A: Bjork! Bjork!

Q: What do you call a miniature dog?

A: A subwoofer.

Q: Where do dogs shop for groceries?

A: A superbarket.

Q: How do dogs like their eggs served?

A: Pooched.

April 30, 2023

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NETSTOCK Executive Dashboard

The NETSTOCK Executive Dashboard is a new feature has been designed to help planners find the items that most need attention and to give executives the KPI's and detail needed to monitor the performance of inventory.

It provides greater visibility of:

- Overall business performance across multiple or all locations.
- Historical KPI data compared to current KPI summary to understand current performance vs. past performance.
- Inventory, sales, ordering KPIs individually or in a summary view.

For more information on NETSTOCK, including its new Executive Dashboard, please contact ASWi's Customer Success Manager Keith Wood (keithw@aswius.com).

Self Approvals

Lease Query have announced that they have added the ability to grant uers permission to approve their own leases and lease changes within LeaseQuery.

This functionality will only be applied to a subscriber's account if it is enabled by the subscriber's administrator within their company settings.

For more information on LeaseQuery and/or this new feature, please contact ASWi's Customer Success Manager Keith Wood (keithw@aswius.com).

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Acumatica Cloud ERP 2023 R1 Spotlight | Commerce

Acumatica offers native integrations to:



Bi-directional data sync with Acumatica's Retail-Commerce Edition.

- Export product data to one or multiple channels
- Import customer data to the CRM
- Keep product availability up-to-date
- Collect, record and report sales taxes

Automate back-office workflows to increase your brands efficiency and fulfillment capabilities.

- Import orders in real-time
- Automate the fulfillment of orders
- Send shipping notifications and tracking information
- Manage returns and refunds

Retail-Commerce Solutions from our Partner Community

eCommerce Platforms

- Magento
- Unilog
- VTEX
- BillTrust
- WooCommerce
- BigCommerce
- Shopify

Marketplace Aggregators

- Channel Advisor
- Feedonomics
- CommerceHub

Marketplace Integrations

- Amazon
- Walmart.com
- eBay

EDI Platforms

- SPS Commerce
- B2B Gateway
- TrueCommerce

IPaaS Integrator Platforms

- Celigo & Integrator.io
- Pipe17

POS

- 1Retail
- Fusion POS
- Shopify POS

Payment Solutions

- Auth.net
- Apple Pay
- Braintree
- PayPal
- Shopify Payments

Tax Solutions

- Avalara
- Vertex

Shipping Solutions

- ShipEngine
- ShipStation
- StarShip
- Paceyjet
- Ship Hawk

MISC

- Kensium Commerce Pro Bundle
- Printshop

[More at www.acumatica.com/marketplace](https://www.acumatica.com/marketplace)

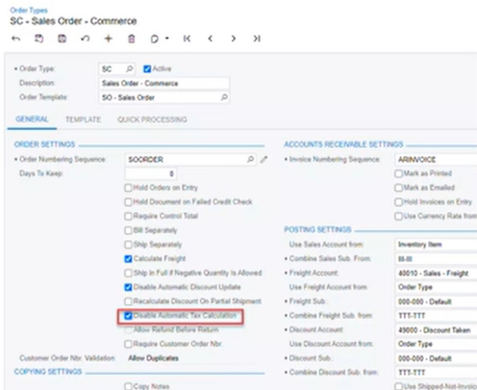
Suppress Tax Recalculations from Retail Orders

Supporting Platforms: All external retail platforms

Goal: Suppress tax recalculations when creating invoices

Merchant Types: All merchant types

Use Case: Like all accounting solutions, Acumatica recalculates taxes before creating a final invoice. This is done even if orders are coming from external solutions where taxes were calculated. In some cases, Acumatica would recalculate taxes and there would be a small discrepancy which lead to manual work. Merchants need the ability to suppress the recalculation to avoid this manual work.



Enable B2B Entities

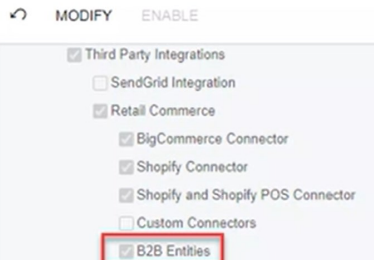
Supporting Platforms: BigCommerce

Goal: Separate the B2B features from B2C features

Merchant Types: B2B

Use Case: Retail merchants who are selling to consumers do not need the B2B features that BigCommerce offers such as customer specific pricing.

Enable/Disable Features



Enhancements for BigCommerce "Pick Up in Store" orders

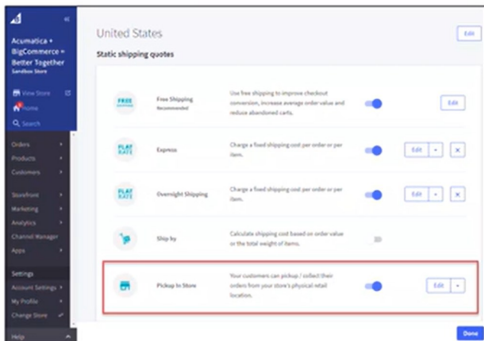


Supporting Platforms: BigCommerce

Goal: Do not export shipping notifications on "Pick up in Store" BigCommerce orders

Merchant Types: All Merchant Types

Use Case: Many retailers are utilizing a "Buy Online, Pick Up in Store" (known as BOPIS) strategy allowing customers to shop from their devices, but pick up the order from a retail location. BigCommerce makes this possible with a "Will Call" shipment type. When orders of this type import into Acumatica, the order will remain open, but it does not need to be picked/packed/shipped, so sending fulfillment notifications back to BigCommerce is unnecessary.



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Acumatica Cloud ERP 2023 R1 Spotlight | Commerce

Configure “Pick Up in Store” in BigCommerce

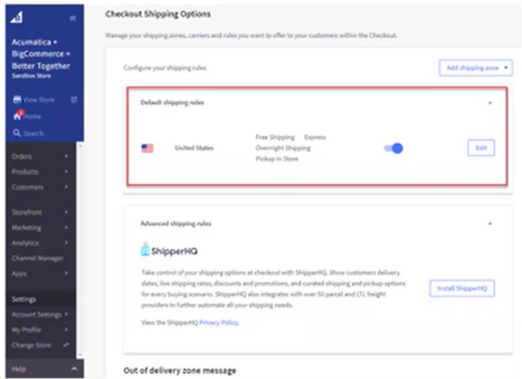
Inside the BigCommerce Admin go to:

Settings > Shipping

You will likely have a USA region set up already. If not, you'll need add USA (or your specific region) and configure as a Shipping Zone.

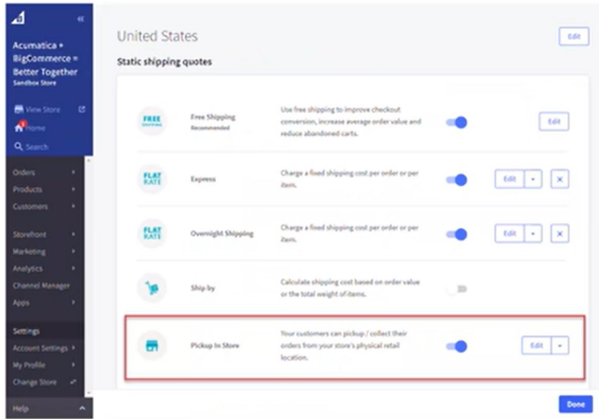
Click “Edit” to the right of United States

Enable the “Pickup In Store” option



Enable “Pick Up in Store”

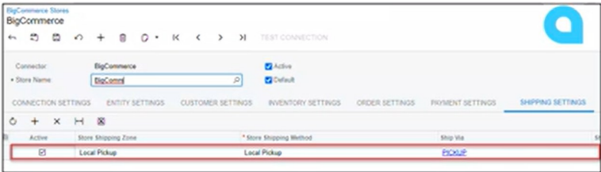
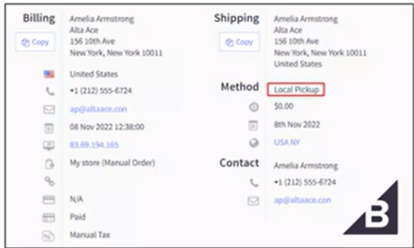
Within the admin of the Shipping Zone, enable the “Pickup In Store” option.



Map the Shipping Method and Ship Via

When the “Pick up in Store” shipping option is selected, within BigCommerce the Shipping method will be recorded as “Local Pickup”

Within Acumatica's BigCommerce Stores configurations, map the Local Pickup method to the Ship Via you configured for “Pick up in Store”

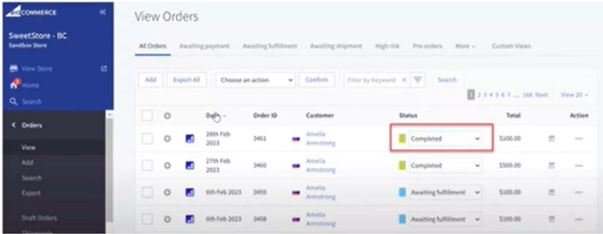


Order status in BigCommerce

Orders which had “Pick up in Store” selected for shipping will still need to be processed in Acumatica.

After the order is processed in Acumatica, an update is exported to BigCommerce.

When the Shipment entity exports to BigCommerce, the order will simply be updated to the status “Completed”.



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Acumatica Cloud ERP 2023 R1 Spotlight | Commerce

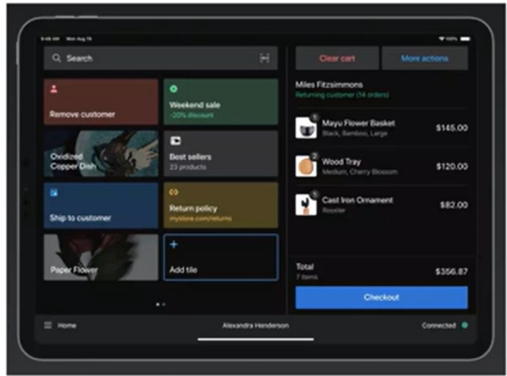


+



Modern POS Software and Cloud ERP built for the future of retail.

With Acumatica and Shopify POS, retailers can manage their retail business from a unified admin that enables them to manage operations online and in-store, with fully synced inventory, customers, orders, and more.

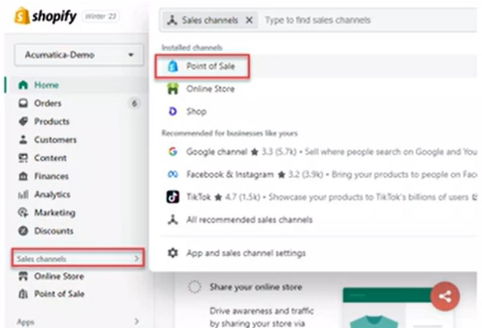


Supporting Platforms: Shopify POS

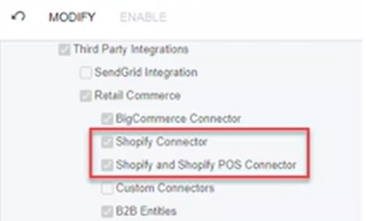
Goal: Make it easier for our partners to demonstrate Shopify POS with Acumatica

Merchant Types: B2C, D2C and B2B

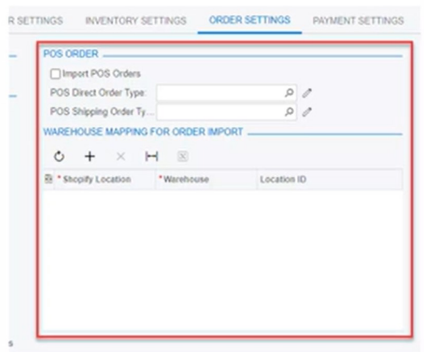
Use Case: Our partners needed the ability to easily setup and configure Shopify POS with Acumatica. Before, Shopify did not offer a demonstration instance to all external parties, which required our partners to rely on Acumatica or demonstration videos when selling Shopify POS.



Enable/Disable Features



- Enable/Disable Feature screen
 - Enable both "Shopify Connector" and "Shopify and Shopify POS Connector"
- On the Shopify Store Settings > Orders tab
 - Enable Shopify POS
 - Choose an Order Type for:
 - POS Direct Order Type
 - POS Shipping Order Type
- **POS Direct Order Type** – Cash and Carry Sales. Use an Sales Invoice type
- **POS Shipping Order Type** – Consumer buys and item which will be shipped to their home. Use a standard Sales Order Type
- Associate the "Shopify Locations" with "Warehouses" configured in tAcumatica to represent these stores.



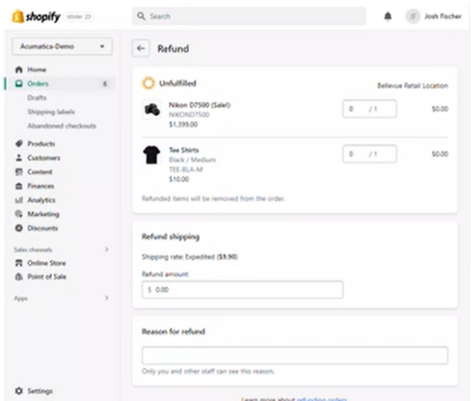
Automatically handle Shopify refunds/returns on partially shipped orders

Supporting Platforms: Shopify

Goal: Shopify returns/refunds to be imported to Acumatica on orders which are currently shipping, partially shipped or on back order

Merchant Types: All merchant types

Use Case: Merchants need the ability to process a return/refund regardless of the orders current state. When an order is in the state of "shipping" or "partially shipped", it is difficult for Acumatica to process a return/refund request automatically which required manual work. Merchants need this to be automated and easier.



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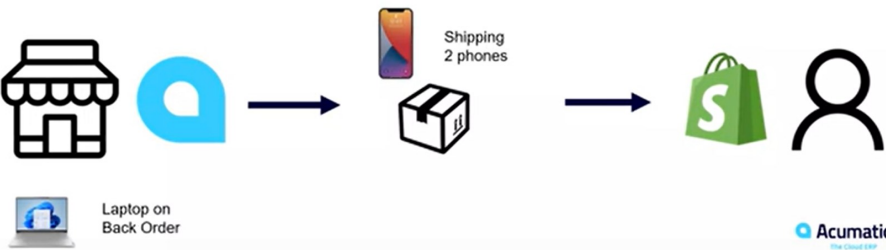
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Acumatica Cloud ERP 2023 R1 Spotlight | Commerce

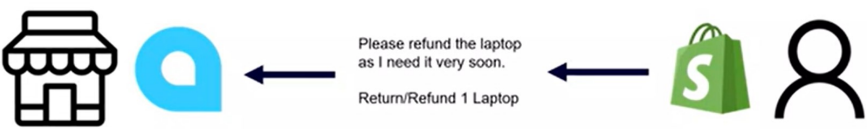
Customer buys products from Shopify eCommerce site



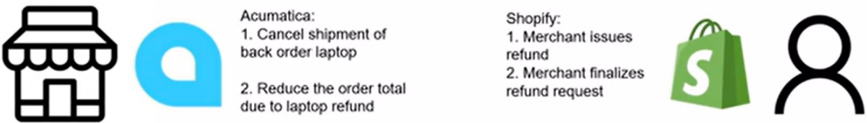
Retailer ships some products, but rest is on back order



Customer Requests a Refund on Back Order Item



Return and Refund are Finalized



Enable the "Returns" entity

In the Shopify Stores > Entity Settings tab ensure that the "Refunds" entity is enabled.

Entity	Sync Direction	Primary System	Real-Time Import	Real-Time Export	Real-Time Mode	Max. Number of Failed Attempts
Customer	Import	External System	Not Supported	Not Supported	Prepare	5
Customer	Import	External System	Not Supported	Not Supported	Prepare	5
Customer Location	Import	External System	Not Supported	Not Supported	Prepare	5
Item Stock Item	Export	ERP	Not Supported	Shipped	Prepare	5
Item Stock Item	Export	ERP	Not Supported	Shipped	Prepare	5
Item Stock Item	Export	ERP	Not Supported	Shipped	Prepare	5
Product Image	Export	ERP	Not Supported	Not Supported	Prepare	5
Product Availability	Export	ERP	Not Supported	Not Supported	Prepare	5
Sales Order	Import	External System	Shipped	Shipped	Prepare	5
Exchange	Import	External System	Not Supported	Not Supported	Prepare	5
Shipment	Export	ERP	Not Supported	Shipped	Prepare	5
Refund	Import	External System	Shipped	Not Supported	Prepare	5

Configure the "Return Order Type"

Within the Shopify Stores > Order Settings tab, configure the "Return Order Type".

If needed, create a new Order Type for these eCommerce returns.

Order Type	Description	Order Template	Automation Behavior
ER	eCommerce RMA Order	RC	RMA Order
RC	Return for Credit	RC	RMA Order

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Acumatica Cloud ERP 2023 R1 Spotlight | Commerce

Go to the Order Type which was selected for the Shopify Store > "Return Order Type"

Ensure that "Validate Card Refunds Against Original Transactions" within the "Payment Settings" section is unchecked.

The screenshot shows the 'Order Type' configuration page for 'RC - Return for Credit'. The 'Order Type' is set to 'Return for Credit'. The 'Invoice Numbering Sequence' is 'ARINVOICE'. The 'Days To Keep' is '30'. The 'Posting Settings' section includes 'Inventory Item' (40010 - Sales - Freight), 'Order Type' (000-000 - Default), 'Discount Account' (49000 - Discount Taken), and 'Discount Sub' (000-000 - Default). The 'Payment Settings' section includes 'Validate Card Refunds Against Original Transactions' (unchecked). The 'Intercompany Posting Settings' section includes 'Inventory Item' and 'Inventory Item'.

Order Type: RC - Return for Credit

Order Numbering Sequence: ARINVOICE

Days To Keep: 30

Hold Orders on Entry: ☒ Hold Document on Failed Credit Check: ☐ Require Control Total: ☐ Bill Separately: ☐ Ship Separately: ☐ Calculate Freight: ☒ Ship in Full if Negative Quantity is Allowed: ☐ Disable Automatic Discount Update: ☐ Recalculate Discount On Partial Shipment: ☐ Disable Automatic Tax Calculation: ☐ Allow Refund Before Return: ☒ Require Customer Order Nbr: ☐ Allow Duplicates: ☐

Customer Order Nbr Validation: ☐

COPYING SETTINGS

Copy Notes: ☐ Copy Attachments: ☐ Copy Header Notes to Shipment: ☐ Copy Header Attachments to Shipment: ☐ Copy Header Notes to Invoice: ☐ Copy Header Attachments to Invoice: ☐ Copy Line Notes to Shipment: ☐ Copy Line Attachments to Shipment: ☐ Copy Line Notes to Invoice: ☐ Copy Line Attachments to Invoice: ☐ Only Non-Stock: ☐ Copy Line Attachments To Invoice: ☐

Posting Settings

Inventory Item: 40010 - Sales - Freight

Order Type: 000-000 - Default

Discount Account: 49000 - Discount Taken

Discount Sub: 000-000 - Default

Use Shipped-Not-Invoiced Account: ☐

Post Line Discounts Separately: ☐ Use Discount Sub. from Sales Sub: ☐ Auto Write-Off: ☐

Intercompany Posting Settings

Inventory Item: Inventory Item

Inventory Item: Inventory Item

Payment Settings

Validate Card Refunds Against Original Transactions: ☐

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Sales 101 | Sales Preparedness

By Jennifer Gluckow

Sales preparedness is usually a reflection of personal preparation.

Get ready. Get set. Go! The hardest part is “get ready.” In sales, it’s known as “preparation.” If asked, most salespeople, if not all, would say they know preparation is important. But most salespeople (not you, of course) are not preparing the right way for meetings, potential sales calls, or networking events.

And while you may be great at presenting on the spot, or winging it, doing the right kind of preparation prior to the meeting could make the difference between a one-call close, a strikeout, or a strung out sales cycle. Your preparation (or lack thereof) will make or break the sale.

What Are You Not Doing And Need To Be Doing?

Let me give you a hint: it focuses around the word THEM.

Ever arrive to a dinner party and the host is still prepping the food when guests arrive? The host is so caught up worrying about making the meal, they don’t have time to connect with and further relationships with their guests. While they may be friendly, it is clear they’re unprepared.

Now imagine you arrive and the table is set, the food ready to serve. The food is then served by a staff of catering people wearing white aprons and being extensively polite. What difference does that make for you as a guest? For the host? It’s the same thing in sales.

“Being ready, serving with excellence, and personalized interaction leads to a memorable experience.”

Here’s what to prepare for the meal and how to prepare your table so that when your guest sits down, they know they’re in the right seat. These are the ABC’s of sales preparedness.

Preparation A: Attitude. You Need The Right Attitude.

ALL THE TIME to win the sale. And for most people (especially if you grew up or live in NYC) that attitude is not natural – it’s something you need to work on EVERY day.

Your attitude begins with the very first thing you do each morning. What are you reading? What are you looking at?

HINT: learning about a devastating event that happened overnight is not attitude building. It’s attitude deflating. Wake up and read something positive – make it intentional and pick it out the night before. Wake up and watch or view something positive. Have a twitter inspiration list or an additional Instagram account with only positive posters. Listen to positive music. That will set your daily foundation. Throughout the day, you need to rely on and drawback to your positive attitude. The key is consistency.

Preparation B: Be Brief and Believe

Tell your story – your pitch on how you, your company, your products and services can help your customer. But if you take forever to tell it, your customer will lose interest. To be brief, you need to practice.

ASWi Customer Newsletter

Sales 101 | Sales Preparedness (continued)

By Jennifer Gluckow

Make sure you touch on the points your customer will connect to most. In order to be believable, you need to believe. Belief starts with you.

Ask yourself: how's your belief in your products and services? In your company? In your ability to help? All of these answers will come through in a New York Minute.

Preparation C: Customer Connection.

10 years ago, making a customer connection was a lot more difficult than it is today.

Nowadays, the information you need to make a customer connection is at your fingertips...literally. All you need to do is Google them! Before your meeting, use Google, their website, their blog, and social media, especially LinkedIn, to find out what's important to THEM.

Check your CRM to see if there's any past information from the previous sales rep or account manager, AND ask your friends, colleagues, business associates if they know of the prospect and if there's anything you should know.

Some of you may be thinking, "That's a lot of prep work for one sales meeting," but here's the reality: the more prep you do, the easier and quicker you will get the sale.

Preparation D: Don't Flub It Up.

Meet with the Decision maker. Whether or not you're meeting with the decision-maker (and I sure hope you are), you need to be prepared as if the decision-maker walks into the room.

Figure out ahead of time what the decision-maker cares about and what they may ask about. Know what he or she needs and address those needs even if it's not your product or service. Use every connection you have and mother Google to guide your preparation.

Preparation E: Engagement and Enthusiasm

The best way to engage is to be prepared with questions, information and ideas about THEM. Questions and ideas that both demonstrate you've done your research, and make them stop and think, and respond in terms of you. Let them begin to feel that internal wow!

Preparation F: Focus. Friendly. Find The Motive.

Three big preparations in sales. Focus on the meeting OUTCOME and create dialogue and interactions to get you there. Be as friendly as you can be without losing your sincerity. And uncover through questions (Preparation E) why they want to buy. Their "why" is your answer to "when" and "urgency."

Preparation G: Give Value. Always Give Value.

The only way to do that is to first figure out what the prospect will perceive to be valuable. If you think you're providing something of value and the customer does not perceive it to be, then guess what, buddy? It's not value. Value is NOT a "proposition" – it's an offering that helps them in their effort to succeed.

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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
5/4	1:00 pm CST	How Curran Builds and Adapts in the Home Goods and Furnishings Industry
5/9	1:00 pm CST	Build Better Construction Operations with Acumatica
5/9	1:00 pm CST	Digitize Your Business and Automate Supply Chains with EDI from SPS Commerce
5/11	1:00 pm CST	Tips and Tricks: Manufacturing Edition
5/16	1:00 pm CST	Why Acumatica Cloud ERP Outperforms Sage Construction
5/18	1:00 pm CST	Food and Beverage Manufacturers Find the Ingredient for Success with Acumatica
5/23	1:00 pm CST	Empowering Your Field Service Workforce with Mobile Solutions

Blogs

Date	Article
4/27	Acumatica 3 ERP Strategies Your Property Management Company Needs to Know
4/25	Acumatica 2023 R1: How to Evolve Your Business with an Intelligent Platform

Acumatica Community Discussions of Note



Thread
Conditionally enable/disable the “Set Qty” button on the Receive & Put Away form
Show a custom field’s value in a grid.
Retail Commerce Edition vs Distribution Edition
How to unsynchronized a budget
REST API requests timing out on sandbox


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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

Love

Serve

Care