

ASWi HAPPENINGS

ASWi Customer Newsletter

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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.

Happy Old Rock Day!



Some “old rocks” that were discovered in 1978 outside of Waco, TX

Today is the day to show our appreciation for all things fossilized and stony.

Old rocks are essential when it comes to understanding the history of our planet and learning more about the Earth in general. They are able to tell scientists the story of what happened to cause the rocks to form, as well as revealing the effects these natural events have had on other forms of life within that area.

Great ways to celebrate Old Rock Day:

- Visit a natural history museum.
- Take a nice walk in a park or “greenbelt”.
- Research rocks, either online or at the library.
- Enjoy some rock art, viewing other’s creations or making your own.

Dad Jokes | Fossils Edition

While moving to our new house, I lost several of my fossils from when I was a kid. They weren’t really worth much, so I guess it’s just the sedimental value that I’m missing.

Did you hear that a fossilized PC was found? It had about a trilobite of storage on it.

Archeologist 1: See this fossil? It was afraid before it was petrified.

Archeologist 2: Because it’s from a [Gloria-Gaynor-saur](#).

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Acumatica Cloud ERP Capability | Consolidated Shipments

You can consolidate shipments, creating one shipment (and corresponding shipment document) for multiple sales orders of the same customer, unless the **Ship Separately** check box on the **Order Types** (SO201000) form is selected for the order type being used.

As long as the check box is cleared, you can use the **Process Orders** (SO501000) form to create one shipment for multiple sales orders associated with the same customer. Sales orders with the predefined order type SO don't require goods to be shipped separately for separate sales orders.

The orders of the type for which the **Ship Separately** check box is selected can still be consolidated into a single shipment if you manually add them using the **Add Order** button on the **Details** tab of the **Shipments** (SO302000) form.

Process Orders

PROCESS

PROCESS ALL

⌵

⌵

⌵

⌵

Action:

Create Shipment

Select By:

Ship Date

Start Date:

• Shipment Date:

1/5/2023

• End Date:

1/5/2023

Customer:

Carrier:

Ship Via:

Warehouse:

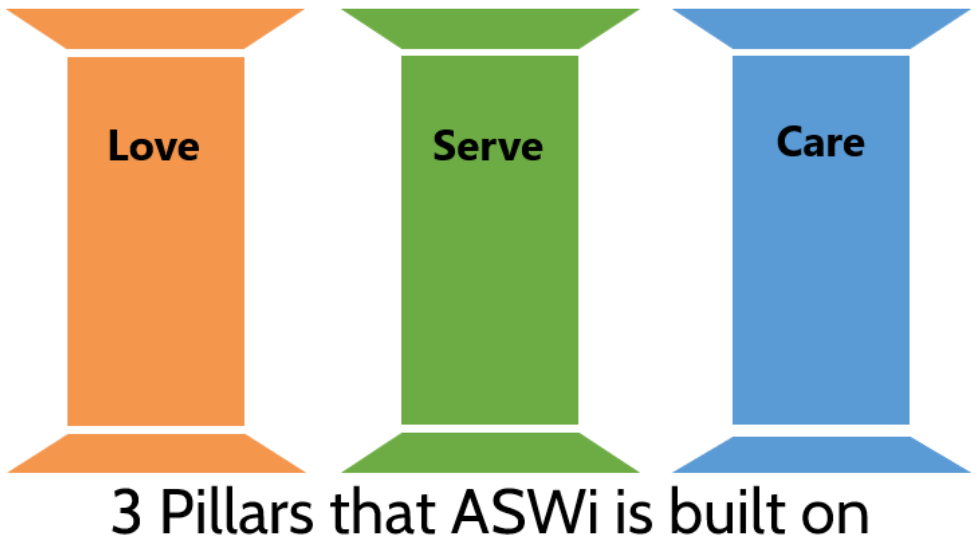
ALL RECORDS

REQUESTED THIS MONTH

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Order Nbr.	Description	Customer Order Nbr.	Status	Customer ID	Customer Name	Location	Location Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006722	Consumer G...	TOYSTAR20222-014	Open	TOYSTAR	Star America Toys	MAIN	Primary Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006727	Food Order fo...	ABARTENDE20222-019	Open	ABARTENDE	USA Bartending School	MAIN	Primary Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006732	Widget advan...	KRKCONSULT20222-043	Open	KRKCONSULT	KRK Consulting Service	MAIN	Primary Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006738	Food distribut...	FDITAMPA20222-058	Open	FDITAMPA	Tampa Bay Food Distribution	MAIN	Primary Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006741	Consumer or...	MARINAGOLF20222-061	Open	MARINAGOLF	Marina Golf Club	MAIN	Primary Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006752	Consumer go...	PRECISION20222-079	Open	PRECISION	Precision Photos	MAIN	Primary Location
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006768			Open	AACUSTOMER	Alta Ace	MAIN	Primary Location
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SO006771			Open	AACUSTOMER	Alta Ace	MAIN	Primary Location
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SO006773			Open	ABCHOLDING	ABC Holdings Inc	MAIN	Primary Location

Another setting that affects the creation of consolidated shipments is the **Use Customer's Account** setting specified in a shipment document on the **Shipment Settings** tab of **Shipments** (SO302000) form.

The system copies the state of this check box from the related sales order. Thus, if you mass-process multiple sales orders that have different states of the **Use Customer's Account** check box on the **Shipping** tab of the **Sales Orders** (SO301000) form, the system will group the sales orders by the state of this check box and create two consolidated shipments: The first shipment will include the sales orders in which the check box is selected, and the second shipment will include the sales orders in which this check box is cleared.



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ISV Product Spotlight | IIG AcuRental webinar/new features



On Tuesday, January 10th at 1:00 pm CST, IIG will be holding a webinar showcasing their AcuRental addon to Acumatica Cloud ERP.

In the session, they will provide an overview of AcuRental's key features and benefits plus the following new features:

- Tighter integration to Acumatica Cloud ERP Field Service Management and its calendar board for scheduling a crew to work on projects and installation.
- Equipment ROI improvement.

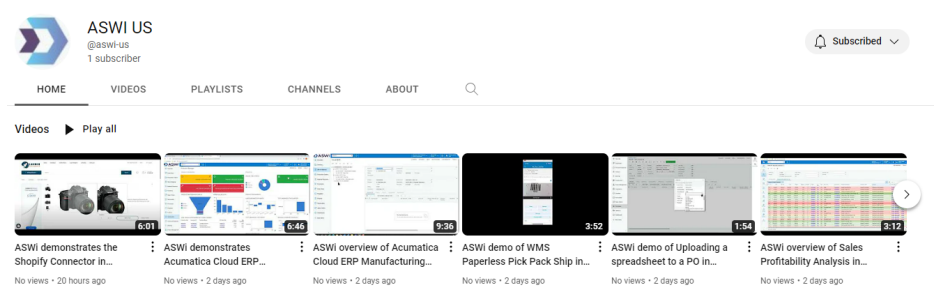
ASWi Named a 2022 Top 100 VAR Star

Every year industry analyst and publisher of [ERP Global Insights](#) Bob Scott nominates a 100 VAR Stars list. Honorees are selected for their accomplishments in the field of midmarket ERP software, and this year ASWi has made the list.

According to ERP Global Insights, the selection of the ERP value added resellers (VARs) that made the list “rests on quality, not revenue, as the deciding factor in picking the 100 businesses that are selected for this honor.”



ASWi Has a New YouTube Channel



On Wednesday, January 4th, the new ASWi YouTube channel was brought online at <https://www.youtube.com/@aswi-us>.

We currently have 11 movies added to 3 playlists on the channel, with another 20+ more that will be added in the coming weeks.

Please feel free to subscribe to the channel and let me know your comments and suggestions for additional movies that we should create and add to the channel.

ASWi Customer Newsletter

Sales 101: Reality Testing Sales Pipeline Opportunities

by Jeb Blount

Reality testing sales pipeline opportunities is an important step in ensuring the success of your sales efforts and the effective use of your time. It's important to regularly check the accuracy of your assumptions about the viability of the deals in your pipeline against hard evidence that those deals are advancing in line with your sales process.

“Reality Testing” is the ability to see things as they are, rather than what you would like them to be. You cannot afford to waste time with pipeline opportunities that you won't win. Nor can you spend time with stakeholders who can't or won't buy.

For sellers, the greatest waste of time is spending it with the wrong prospect. As we move into a period of market volatility, it is critical for self-professionals to get real about what's in their pipeline.

Confirmation Bias

Confirmation bias is a type of cognitive bias that involves paying more attention to information that confirms one's preexisting beliefs or hypotheses, while giving less attention to information that contradicts those beliefs. It is the human tendency to see what we want to see and hear what we want to hear.

With sales pipeline opportunities, confirmation bias can lead salespeople to interpret new information in a way that fits with their preexisting views, even if that interpretation is not necessarily accurate. It's the act of putting on rose colored lenses.

For example: When a buyer says, “I might be interested.” It is interpreted to mean, “I absolutely want to do business with you.”

Confirmation bias can have a number of negative effects. It causes salespeople to hold onto false beliefs, make flawed decisions, have clouded judgement, and to be more resistant to pushback from leaders during pipeline reviews.

Awareness is the key to overcoming this natural human bias. This, in fact is what reality testing is all about – considering a diversity of viewpoints from your leaders and team members along with actively testing and challenging your own beliefs and assumptions.

Empty Pipeline Lead Confirmation Bias

Confirmation bias and false beliefs about sales pipeline opportunities run rampant on sales floors. This is why most sales pipelines are little more than pipe dreams and sales teams consistently miss forecasts. The culprit, in most cases, is simple: Empty pipelines.

When salespeople are consistently prospecting and keeping their pipe full, they are much more in tune with reality. When an opportunity is not advancing they quickly run a reality test and if it doesn't meet their win probability standards, they'll walk away.

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[Sales 101: Reality Testing Sales Pipeline Opportunities \(cont'd\)](#)

by Jeb Blount

Focus on Winnable Deals

This may be a blinding flash of the obvious but if you want to sell more, spend your time with and invest resources in deals that will close. Desperate sales reps have a bad tendency to ignore win probability and scratch lottery tickets.

High-performing sales professionals are consistently reality testing on every deal to gauge win probability (WP). When WP drops below a comfortable threshold, they walk away and focus their time and attention on winnable deals.

Ideal Qualified Prospects

Reality testing starts with getting clear on your ideal qualified prospect. An ideal qualified prospect (IQP) is a potential customer that is a good fit for your company's products or services and that is also likely to make a purchase. In other words, high win probability.

In order to identify ideal qualified prospects, you'll typically use criteria such as industry vertical, business size, demographics, geographic location, budget, purchasing habits, and other relevant characteristics.

The best place to begin when developing your IQP is by building a detailed description of the characteristics of your best existing customers. Take time to analyze customers that are the best fit, easy to work with, generate the most profit, and view you as a long-term partner. Then, focus your time and attention on finding more of these types of customers.

Test Engagement and Commitment

During sales conversations, be careful not to brush over signs that your prospect may not be committed to the process. Sometimes they are just not that into you or the process. Never forget that you cannot force someone to buy from you.

When a buyer seems to be hedging their bet or hesitating ask them about it directly. Say: "I'm sensing some hesitance. It seems like you have a lot going on right now. I'm just curious, on a scale of 1-10, how committed are you to this project?"

The objective of this question is to switch hats with your buyer and compel them to sell you on why you should invest more time with them.

Likewise, test engagement by asking stakeholders to do things for you. If they are willing to give you information, lean in and answer questions honestly, willingly introduce you to other stakeholders, and agree to next steps, and show up to meetings it's a good sign that they are engaged.

Conduct Pipeline Opportunity Reality Testing with Your Team

Reviewing your deals with your sales team and leaders can help you get right with reality and make an informed decision on whether to continue to pursue a particular deal or not.



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Movies of Note

Date	Movie
1/4	ASWi Acumatica Cloud ERP Financials overview
1/4	ASWi Acumatica Cloud ERP Accounts Receivable overview
1/5	ASWi Acumatica Cloud ERP Manufacturing - Bill of Materials (BOMs)
1/5	ASWi Uploading a spreadsheet to an Acumatica Cloud ERP PO
1/4	ASWi Acumatica Cloud ERP - AP Document Recognition
1/5	ASWi Acumatica Cloud ERP - Sales Profitability Analysis overview
1/4	ASWi Acumatica - FastBound Connector & Acumatica Cloud ERP demo
1/4	ASWi Acumatica Cloud ERP - Using Bank Feeds with Credit Cards
1/5	ASWi Acumatica Cloud ERP - WMS paperless Pick-Pack-Ship
1/5	ASWi Acumatica Cloud ERP Manufacturing - Make to Order process
1/5	ASWi Acumatica Cloud ERP - Shopify Connector

Acumatica Webinars

Date	Time	Webinar
1/10	1:00 pm CT	Power Work Forward with Exceptional Usability in Acumatica Cloud ERP
1/11	1:00 pm CT	How R&I Industries Streamlines Fabricated Metal Operations with Acumatica Manufacturing Edition
1/12	1:00 pm CT	Field Service Management Essentials
1/14	1:00 pm CT	Why Acumatica Cloud ERP Outshines Oracle Netsuite
1/18	1:00 pm CT	Tips and Tricks: Distribution Edition
1/19	1:00 pm CT	Building a Solid Foundation for Your Construction Business
1/24	1:00 pm CT	Modernize Manufacturing Operations with a Comprehensive, Multi-Modal System
1/26	1:00 pm CT	Retail Tools to Strengthen Customer Experiences

Acumatica Blog

Date	Article
1/5	Acumatica Summit 2023: Who Says Industry Events Can't Be Both Informative and Fun?
1/3	Celebrating Women in Tech at Acumatica Summit 2023
12/29	Deploy Acumatica Customizations with Confidence Thanks to Continuous Integration & Delivery
12/27	Integration Using the REST API Client with Acumatica's Manufacturing Module

Acumatica Community Discussions of Note

Thread
How to limit a Generic Inquiry to inventory items with a default vendor.
Restricting a user to create "Invoice" only from the Type field for Sales Orders.
How to create a conditional format when create a report.
Custom report that runs automatically in the evening & distributes to an email list.
Prepayment Register.



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Calendar of Events

Date	Event/Activity	Notes
1/16 - 17	NSSF SHOT Week Supplier Showcase	Visit ASWi's FirearmsERP team at our booth 51510.
1/17 - 20	NSSF SHOT Show	Caesars Forum & Venetian Expo, Las Vegas, NV. Register Here
1/17 - 19	World of Concrete	Las Vegas Convention Center. Register Here .
1/29 - 2/3	Acumatica Summit 2023	Wynn's Las Vegas. Visit Summit website here .
1/31 - 2/2	NAHB International Builders' Show	Las Vegas Convention Center. Register Here .
2/26 - 3/1	ASD Market Week	Las Vegas Convention Center. Register Here .
3/14 - 18	CONEXPO-CON/AGG	Las Vegas Convention Center. Register Here .
3/20 - 23	PROMAT	McCormick Place, Chicago, IL. Register Here .
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