

ASWi HAPPENINGS

ASWi Customer Newsletter

In this issue:

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- Dad Jokes of the Day
- Acumatica 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.

Monkey Around With New Friends Today



National Make a Friend Day

Today is a fantastic opportunity to meet someone new and make a new friendship. Friends serve a vital role in everyone’s lives. They are one of life’s most valuable assets.

New friends can broaden our horizons by helping us to see new perspectives, challenging us to try something different, or connecting us to opportunities.

Meeting new people can help sharpen our social skills and keep us from becoming lonely.

“Friends are those rare people who ask how you are and then wait for the answer” – Ed Cunningham

Great ways to celebrate National Make a Friend Day:

- Get out to your favorite “happy place”, whether that’s a park, a shopping district, etc., introduce yourself to someone new and make a friend. (while not necessarily a favorite of mine, I had a couple of the best conversations I’ve had in a long time with new-made friends on Thursday and Friday in AUS and DFW airports)
- Introduce your friends from different circles to each other.
- Invite someone you’d like to know better out for coffee and a chat.

Dad Jokes | Gorilla Edition

Q: What do you call an 800 pound silverback gorilla?

A: Sir.

Q: How do you fix a broken gorilla?

A: With a monkey wrench.

A gorilla walks into a trendy bar.

Gorilla: “Could I have a pint of Electric Jellyfish IPA, please?”

Bartender: “That’ll be \$18.50... You know, we don’t get many gorillas in here.”

Gorilla: “With these prices, I’m not surprised!”

I accidentally used Gorilla Glue instead of ChapStick. It left me speechless.

Q: What does a gorilla wear in the kitchen?

A: An ape-ron.

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Acumatica Controlled Release Features | Special Orders

Special Orders is a controlled release feature that allows you to tightly link purchase order costs with the delivery of goods on sales orders for “Special Orders”. These could be items that you normally do not keep in stock and/or have a really volatile cost.

Sales Orders
SO - USA Bartending School

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• Order Type: SO

Order Nbr.: <NEW>

Status: Open

• Date: 1/5/2023

Requested On: 1/5/2023

Customer Ord...

External Refer...

• Customer: ABARTENDE - USA Bartending Schor

• Location: MAIN - Primary Location

Contact: Fadi Kabuk

Currency: USD 1.00

VIEW BASE

• Project: X - Non-Project Code

Description:

Ordered Qty.: 5.00

Discount Total: 0.00

VAT Exempt T...: 0.00

VAT Taxable T...: 0.00

Tax Total: 0.00

Order Total: 1,319.00

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

⌂ + ✎ ✕ ADD ITEMS ADD MATRIX ITEMS ADD INVOICE ADD BLANKET SO LINE LINE DETAILS PO LINK ITEM AVAILABILITY ⌂ ⌕ ⬆

Ship On	Shipping Rule	Undership Threshold (%)	Overship Threshold (%)	Complete	Substituti Required	Free Item	Special Order	Mark for PO	PO Source	Unit Cost	Drop-Ship PO Nbr.
1/5/2023	Back Order Allowed	100.00	100.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Purchase to Order	160.00	

As you can see above, we can also change the unit cost for this special order instead of using the cost that your business rules would normally dictate. This special order will also not affect the Average Cost for the item.

This is a hidden feature in 2023 R1 which can be enabled now for testing and use by installing a customization project.

If you would like to learn more and/or schedule our professional services team to make the feature available, please contact Keith Wood (keithw@aswius.com).

Acumatica Experimental Features | Faster RMA Process

Currently, to process an RMA there are quite of number keystrokes and click

Sales Orders
SO S0006766 - Elevation Computers

⌂ NOTES ACTIVITIES FILES CUSTOMIZATION TOA

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• Order Type: CS

Order Nbr.: 001568

Status: Completed

• Date: 12/7/2013

Requested On: 12/7/2013

Customer Ord...

External Refer...

• Customer: ELEVATION - Elevation Computers

• Location: MAIN - Primary Location

Contact:

Currency: USD 1.00

VIEW BASE

• Project: X - Non-Project Code

Description: Warehouse pickup - Computer

Ordered Qty.: 5.00

Discount Total: 0.00

VAT Exempt T...: 0.00

VAT Taxable T...: 0.00

Tax Total: 0.00

Order Total: 2,375.00

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS RELATIONS TOTALS

⌂ + ✎ ✕ ADD ITEMS ADD MATRIX ITEMS ADD INVOICE LINE DETAILS PO LINK ITEM AVAILABILITY LINK PROD ORDER ⌂ ⌕ ⬆

Branch	Inventory ID	Warehouse	Line Description	*UOM	Manual Price	*Request On	Ship On	Ext. Price
> PRODWHOLE	AACOMPUT	RETAIL	Acer Laptop Computers	EA		12/7/2013	12/7/2013	2,500.00

Return Order Type

Order Type: SELECT

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

required. Acumatica are developing an “Experimental Feature” to streamline this process use adding a RETURN button to the Sales Orders form.

Sales Orders
RM S0006777 - Elevation Computers

⌂ NOTES ACTIVITIES FILES CUSTOMIZATION TOA

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• Order Type: RM

Order Nbr.: S0006777

Status: Open

• Date: 1/11/2023

Requested On: 1/11/2023

Customer Ord...

External Refer...

• Customer: ELEVATION - Elevation Computers

• Location: MAIN - Primary Location

Contact:

Currency: USD 1.00

VIEW BASE

• Project: X - Non-Project Code

Description: Warehouse pickup - Computer

Ordered Qty.: 5.00

Discount Total: 0.00

VAT Exempt T...: 0.00

VAT Taxable T...: 0.00

Tax Total: 0.00

Order Total: 125.00

DETAILS TAXES COMMISSIONS FINANCIAL SHIPPING ADDRESSES DISCOUNTS SHIPMENTS PAYMENTS RELATIONS TOTALS

⌂ + ✎ ✕ ADD ITEMS ADD MATRIX ITEMS ADD INVOICE LINE DETAILS PO LINK ITEM AVAILABILITY LINK PROD ORDER ⌂ ⌕ ⬆

Branch	Inventory ID	Related Items	Warehouse	Line Description	*UOM	Quantity	Qty. On Shipments	Open Qty.	Unit Price	Manual Price	*Request On	Ship On	Ext. Price	Discount Percent	Discount Amount
PRODWHOLE	AACOMPUT01		RETAIL	Acer Laptop Computer	EA	-5.00	0.00	-5.00	500.00	<input checked="" type="checkbox"/>	1/11/2023	1/11/2023	-2,500.00	5.000000	-125.00
PRODWHOLE	AACOMPUT01		WHOLESALE	Acer Laptop Computer	EA	5.00	0.00	5.00	500.00	<input type="checkbox"/>	1/11/2023	1/11/2023	2,500.00	0.000000	0.00

If you would like to learn more and/or schedule our professional services team to make the feature available, please contact Keith Wood (keithw@aswius.com).

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[Sales 101 | Say This to Get Better - Right Now](#)

By Mike Brooks

Want some quick (and easy) tips that will make your sales team better right away?

You'll find them below, and I guarantee that if you use them, you'll not only identify buyers faster, but you'll feel more confident, you'll close more sales, and your income will grow—starting today.

Here are quick/easy things you can say to make yourself—or your sales team—better:

Instead of saying, “I don’t know if you have any budget for this...”
Say: “And what type of budget do you have set aside for this?”

Instead of saying, “Why don’t we set up another meeting to talk about this...”
Say: “From what you’ve seen today, is this something you feel would work for you?”

Instead of saying, “The sooner you start with this, the sooner you’ll see the results...”
Say: “What is your timeline for getting started with something like this?”
BETTER: “Based on what you’ve seen today, does this sound like something you’d like to put to work for you?”

Instead of saying, “Who else needs to look at this?”
Say: “Is this something that you would recommend to (this other person)?”

And if YES, then: “And do they generally take your recommendations?”

OR: “I’m sure you work with (the other person) pretty closely, so from what you know about what they’re looking for, do you think they would go with this?”

As you can see, the point is to be more assumptive, instead of beating around the bush and not asking.

Remember, YOU are the closer, and YOU need to be leading the sale. And you can. And by adopting the questions above, you will!



HAPPENINGS

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Movies of Note

Date	Movie
2/11	Acumatica 2023 Summit Keynote - Day 1
2/10	Dynamics Budgets Dynamics Budgets for Acumatica
2/10	BigCommerce Why Now if the Right Time for Digital Transformation
2/7	Asgard Asgard Labels for Acumatica

Acumatica Webinars

Date	Time	Webinar
2/14	1:00 pm CT	Retail Tools to Strengthen Customer Experiences
2/15	1:00 pm CT	Tips and Tricks: Manufacturing Edition
2/16	Noon CT	LeaseQuery CPE Webinar - Accounting Policies
2/21	1:00 pm CT	Building a Solid Foundation for your Construction Business
2/23	1:00 pm CT	Modernize Manufacturing Operations with a Comprehensive, Multi-Modal System
2/28	1:00 pm CT	Why Acumatica Beats Brightpearl at Business Resilience
2/28	11:00 am CT	3 Components of Best-in-Class Omnichannel Operations and Technologies to Achieve Them
3/8	Noon CT	Quality Management for Acumatica

Acumatica Blog

Date	Article
2/7	Recap: Acumatica Hackathon 2023
2/6	Positively Setting the Record Straight: Responding to Competitor Misinformation
2/3	The Acumatica Summit 2023 Experience: Celebrating Community
1/28	CMMS-Lite – An Acumatica Community Project

Acumatica Community Discussions of Note

Thread
Event Activity Tracking Without Project Accounting
View WIP Transactions by production order
How to delete a wiki article that can't be opened?
Expense claim Details report - parameter for personal vs corporate card
Enable the magnifier icon in the search box

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Calendar of Events

Date	Event/Activity	Notes
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

ASWi | Our Values, Mission & Focus



Provide Substantial Value that’s sustainable, scalable & Systemic

