

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 Companies That Care Day

ASWi is a values-based company and we are very happy to celebrate Companies That Care Day, as it's about celebrating businesses that care about their employees, their customers, partners and their communities.

And because it gives us another opportunity to say THANK YOU! to you and your team for allowing us to serve you as your ERP solution provider and trusted business advisor.

You can observe Companies that Care Day by:

- Letting your team, customers and partners know that they are valued.
- Find ways to recognize ways your company and teammates are making positive contributions to your community.
- Collaborate with your teammates on ways to help your community.

Dad Jokes | St. Patrick's Day edition



Q: What is the name of the annual leprechaun conference?

A: Lepre-Con.

Q: Why do leprechauns make great secretaries?

A: They are really good at shorthand.

Q: What happens if a leprechaun falls into a lake?

A: He gets wet.

Q: How do you know if someone had fun on St Paddy's Day?

A: If they are Dublin over with laughter.

Q: Why did St Patrick drive the snakes out of Ireland?

A: He couldn't afford the airfare.

Q: What is a fake Irish stone called?

A: A shamrock.

Knock, knock.

Who's there?

Warren

Warren who?

Warren anything green for St Patrick's Day?

Q: Do you know what it means if you find a four-leaf clover?

A: You have too much time on your hands.

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ASWi Customer Spotlight | Flow Tech, Inc.



ASWi is very humbled and proud to be able to serve our customers as an ERP solution provider and a trusted business advisor.

We are very privileged to serve some of the most innovative organizations in the country.

Today, I would like to spotlight and introduce [Flow Tech, Inc.](#)

Flow Tech, Inc sell, service and support products and systems for HVAC and water/wastewater applications. They excel in large commercial and institutional type markets including healthcare, higher education, K-12 schools, pharmaceutical, office buildings and water/wastewater.

Acumatica Cloud ERP Addons | DataSelf - March End Offer

BEFORE	DataSelf Analytics			AFTER
Limited KPI Visibility	POWER	EASE	SPEED	360-Degree Business View
Conflicting Data	 Microsoft SQL Server	 Power BI Excel	8,000+ KPI Library Design Deployment Execution	Single Version of the Truth
Laborious Reports				Automated & Streamlined
Slow-Running Reports				Insights in Seconds
Data Silos				Data Consolidation
Limited Drill-Down				Infinite Drill-Down
Hunting for Answers				Natural Language Query
What to Measure?				Largest Analytics Library

DataSelf Analytics is a Business Intelligence-based reporting solution for Acumatica that takes the stress and strain out of reporting and replaces it with the power, ease, and speed needed to make better decisions .

DataSelf's next-generation BI framework features reports that run in less than 10 seconds, enable "infinite drill-down", and include ad-hoc natural-language querying (NLQ) that let managers dynamically build their own reports.

And -- unlike standard ERP reports which are process-focused and let you see what you are doing, DataSelf's BI-powered reports focus on your organization's performance and how you're doing as a business. Insight into growing (or declining) sales, cashflow projections, and your ability to fulfill orders -- this week, next week, and beyond -- are all at your fingertips with DataSelf's industry-leading analytics library.

Special Offer: If you purchase DataSelf before March 31, 2023, you'll get a free month added to your license -- 13 months for the price of 12.

If you are interested and would like to learn more, please reach out to Keith Wood (kwood@aswius.com).

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Acumatica Satisfaction Survey | April 17 Delivery Date

Acumatica conducts Net Promoter Score (NPS) and Customer Satisfaction (CSAT) surveys twice per year. They do this for the following reasons:

- Gather valuable insights into your team's needs and expectations.
- Recognize areas of improvement.
- Measure overall customer satisfaction, both with ASWi and with Acumatica.
- Identify trends over time.

On Monday, April 17, either a combined CSAT/NPS or an NPS-only survey will be sent to all customers who are live on Acumatica. The survey will remain open through Monday, April 24 at 10:59pm CT.

We will be giving your team a call in the coming weeks to confirm your point of contact will receive the survey and complete it within the April 17 - April 23 window.

Acumatica User Group | Upcoming Meeting Input Needed

The Acumatica User Group is excited to soon be holding its first in-person meeting.

Please note that the Houston Acumatica User Group is not limited to Acumatica Users in the Houston area. All Acumatica subscribers are invited to attend the upcoming event.

In order to plan its first meeting, the Houston Acumatica User Group is asking for your help. If you are interested in participating, please take the time to provide your input to the following questions on the survey found [here](#).

Acumatica Cloud ERP Addons | Velixo - March End Offer

Velixo Reports is a Microsoft Excel Add-In reporting solution that adds a new toolbar to Excel with more than 80 functions specially designed to work with General Ledger, Project data and Generic Inquiries.

Velixo includes features such as Smart Drilldown, Smart Refresh, Writeback, Consolidations and Advanced Security.

Starting now until the end of March, Velixo are offering a 15% discount on the initial purchase of Velixo Reports on its initial 12 month subscription.

If you are interested and would like to learn more, please reach out to Keith Wood (kwood@aswius.com).

Acumatica Cloud ERP Addons | IIG AcuCommissions

IIG AcuCommission provides the ability to setup commission plans based on user defined customer and item groupings for one or multiple salespersons. Commission methods allow for commission amount calculation based on selling price, gross profit, units sold and period-based activities. Calculated commissions can be modified on sales order and invoice transactions. A/P Bills can be generated for earned commissions.

New functionality has been added to this addon that is outlined in the datasheet for IIG AcuCommissions that can be found [here](#) and a recording of a webinar on IIG AcuCommissions that can be streamed [here](#).

If you are interested and would like to learn more, please reach out to Keith Wood (kwood@aswius.com).

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Acumatica Addon Spotlight |

SourceDay
STOP MISSES AT THE SOURCE

While Acumatica Cloud ERP is very powerful and can manage many aspects of a business, but there still may be gaps with critical direct material suppliers.

Manual data input/output leads to unreliable ERP accuracy and potential disruptions in the supply chain, long email threads about simple things like acknowledgments can quickly lead to bottlenecks. That's not a truly collaborative relationship.

SourceDay optimizes and extends Acumatica Cloud ERP, automating all that manual administrative work and bringing suppliers, customers, and other stakeholders together into the same solution.

Over 50% of direct material POs will change, and SourceDay helps you manage those changes seamlessly while quickly communicating changes with suppliers. No more late orders, no more manual communications like emails or spreadsheets, and no more confusion. SourceDay integrates with Acumatica Cloud ERP to fill these critical gaps, delivering true end-to-end PO lifecycle management.

PO Collaboration

In every segment of manufacturing, late POs can be devastating to production schedules and resource allocation. SourceDay's PO Collaboration solution provides automation to every step of the PO management process while also providing visibility and accountability for both buyers and suppliers.

Automated supplier scorecards give a 100% accurate view of every supplier's performance (on-time in full delivery, price variance, responsiveness), which enables better decisions about purchasing and long-term supply chain improvements.

SourceDay Insights

SourceDay Insights brings key data points into a single dashboard so everyone can see accurate metrics at any time. SourceDay Insights also provides data visualization with filtering capabilities so you can drill down on specific information, track metrics, and improve operational efficiency.

Primary Benefits

The main benefits of SourceDay:

- Increase your purchasing team's efficiency
- Scale your business without adding new buyers
- Ensure *all* purchase order updates are in Acumatica (dates, quantities, pricing)
- Improve inventory accuracy, planning, and scheduling

SourceDay bridges the gap between your ERP and your supplier network with a bi-lateral integration into Acumatica. Buyers now manage POs by exception rather than volume. They are no longer reliant on emails and spreadsheets to manage constant PO changes. They're no longer stuck in long back-and-forth exchanges with suppliers or manual data updates in Acumatica. SourceDay replaces all of this with a single digital solution that ensures everyone is on the same page—all the time.

ASWi has heard overwhelming feedback from customers in the Acumatica space looking for help with supplier collaboration. We chose to work with SourceDay because they are unique within the Acumatica technology stack tackling this specific supply chain problem and seeing tremendous success with customers.

If you are interested and would like to learn more, please reach out to Keith Wood (kwood@aswius.com).

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Sales 101 | 3 Tips to Increase Your Voicemail Callbacks

By Mike Brooks

Tired of leaving tons of voicemails and not hearing back from anyone?

Incorporate these proven techniques and give yourself the best chance of hearing back from prospects:

#1: “I need a little help, please...” Technique.

Everyone wants to be helpful, and by leading with this statement, you will peak someone’s interest, and get them to listen a little bit longer.

#2: Let them know you’ll be brief when they call you back.

Most prospects don’t call you back because they don’t want to get caught in a lengthy “pitch,” and they certainly don’t have time to waste. By stating, in advance, that you’ll be brief, you’ll give yourself the best chance of having someone call you back.

#3: Make it easy for your prospect to call you back.

In other words, leave your phone number slowly, deliberately, and twice. Also, tell them your name again at the end as well.

Here’s a template voicemail that you can fit your offering into:

Hi {first name} (or if you don’t know the person you’re trying to reach, then just skip this and say):

Hi, I need a little bit of help, please. My name is _____ and my company is _____. Briefly, we provide _____. Could you take just a minute to return my call and point me in the right direction? I promise I won’t pitch you or try to sell you something; I just need to know the right person or department I should contact.

My return phone number is—I’ll start with the area code—(919) 267-4202. (Say this SLOWLY). Once again, my number is (repeat number here), and my name is _____. Thank you in advance, and I’ll look forward to spending just a minute with you.”

Now, is this the guaranteed recipe for getting 100% of your voicemails returned?

No, there isn’t one but, by being transparent, polite, and promising not to waste someone’s time, you’ll be giving yourself the best opportunity to get those who might call you back, to go ahead and dial your number.

And I’ll bet that’s better than what’s happening now....



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Movies of Note

Date	Movie
3/17	BigCommerce Customer Success Story - Black Diamond
3/13	LeaseQuery What is GASB 96?
3/12	SourceDay SourceDay RFQ Collaboration demo

Acumatica Webinars

Date	Time	Webinar
3/21	1:00 pm CT	Prepare for what's next with Comprehensive Retail Compliance
3/21	1:00 pm CT	Power Work Forward with Exceptional Usability in Acumatica Cloud ERP
3/21	1:00 pm CT	Q1 2023 Avalara product updates
3/22	Noon CT	Validation as a Service for Acumatica
3/22	1:00 pm CT	Modernize Manufacturing Operations with a Comprehensive, Multi-Modal System
3/22	8:00 pm CT	Velixo 101
3/23	1:00 pm CT	Retail Tools to Strengthen Customer Experiences
3/28	1:00 pm CT	Automated Inventory and Order Management with Acumatica Distribution Edition
3/29	2:00 pm CT	Prospero Financials Reporting & Budgeting Demonstration
3/30	1:00 pm CT	Distributors: Acumatica Cloud ERP Leaves Epicor Prophet 21 in the Dust

Acumatica Blog

Date	Article
3/16	Training the Next Generation: Acumatica Now Offered as Hands-On Course at Farmingdale State College
3/14	Fulfilled by Acumatica: What It Means for Acumatica Customers and Solution Providers

Acumatica Community Discussions of Note



Thread
Grouping in Side Panels
How to pass a date from a subreport
Multiple shipments on SO
Get an XML export from Purchase Order Report
How to exclude Prepayment Type in Customer Statement (AR641500)

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Calendar of Events

Date	Event/Activity	Notes
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

Love

Serve

Care