April 8, 2023

▶ ASWi HAPPENINGS

ASWi Customer Newsletter

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. Pease 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 Zoo Lovers Day

Today being National Zoo Lovers Day, it's a great day to get your family together and go see some of the exotic animals from all over the world.

Zoos have a long history, bringing animals from the far flung and mysterious regions of the world straight into our hearts and minds.

Being able to feed giraffes, see prowling lions, laugh at the antics of playful monkeys, and revel at majestic elephants is something that is great for all, young and old(er).

You can celebrate National Zoo Lovers Day by heading to one today, by contributing your time and/or funds to a local zoo and/or by helping funding a trip to the zoo by your local school or religious organization. By doing any or all of these things, you are actually helping to save endangered species from extinction (and having fun!).

Dad Joke | Zoo edition

Jim's truck breaks down on the side of the highway and he has no clue what to do. Luckily a friendly fellow with another truck stopped and asked if the guy needed any help. Jim asks the man if he wouldn't mind taking the penguins to the zoo for him, and Jim would give him $100.

"Sure" the friendly fellow replied.

Jim helped the man transfer the penguins to his truck and off they went. Jim got his truck towed to the shop, and went out to grab some lunch at the local diner. While waiting for his food, Jim looks out the window to see the friendly fellow from earlier walking down the sidewalk, followed by the 100 penguins.

Jim runs out of the diner and up to the man and asks "Why didn't you take these penguins to the zoo!?"

The friendly man said "I did take them to the zoo, but I have a few dollars left over, so now I'm taking them to get ice cream."

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Acumatica User Tips | Examples of Using Attributes

The "Attributes" capability within Acumatica Cloud ERP can be used to solve everyday business challenges.

Inventory Control

In Inventory Control, Attributes can be used to keep track various products' characteristics. For example, size, color, origin, etc. The business may easily control inventory levels for each variation by using Attributes.

Attributes can be used to specify the cube dimensions and quantity per cube for Stock Items. The attributes can then be used to calculate the volume and number of cubes on shipping paperwork using the Report Designer. In this case, the attributes are on the inventory item and the cube is on the shipment paper (such as the commercial invoice).

Sales

In Sales Order Management, a business that sells goods to both wholesale and retail consumers may develop a Customer Type attribute. This characteristic might be used to distinguish between several customer groups and to monitor how well each group is performing in terms of sales.

Projects

In Project Accounting, an organization that has numerous projects might add a Project Status attribute. This property could be used to monitor each project's status and to make sure that things are going according to schedule. For example, the organization could utilize the property to identify a project that is running behind schedule and give more resources to it.

Acumatica Cloud ERP 2023 R1 Spotlight | Distribution

Release Features

- Manage Line Operation Type via Line Quantify Sign.

- Counter Sales: Sales & Returns with Flexible Balance.

- Predefined Distribution User Roles

- Archive Sales Order & Shipment Documents

Controlled Release Features

- Special Orders in Distribution

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Acumatica Cloud ERP 2023 R1 Spotlight | Distribution

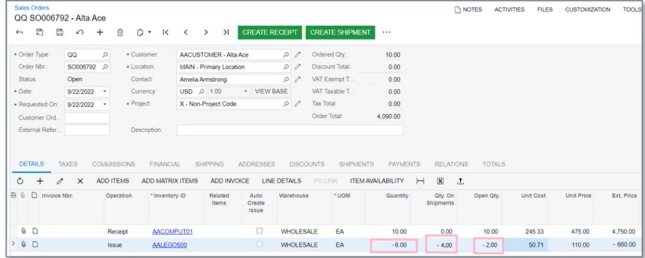**Changing the sign of the Line Quantity automatically changes the Operation Type**

Negative line quantities make other values negative

SO Lines with negative quantities supported in
- Purchase Orders
- Transfers Orders
- Direct vendor returns

**Printed form updated**

Value: Faster data entry & improved accuracy

Counter Sales Representatives
- Easy process
- Stay in Acumatica Sales Order Entry
- Not high volume like Retail

Sales and Returns on the same Order
- Net may be positive or negative
- Unknown whether net positive or negative before starting the order
- Accept a payment or process a refund

No shipments required: Keep it Simple
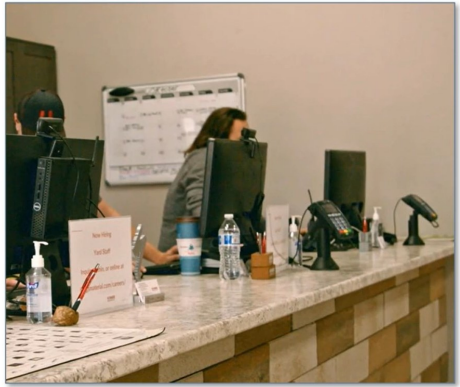
New Mixed Order Automation Behavior

New MO Predefined Order Type
- Automation Behavior: Mixed Order
- Operations: Both Issue and Receipt
- Default Operation: Issue
- AR Document Type: Invoice/Credit Memo
- Process Shipment: Inactive
- Allow Quick Process: Available

If Company receives cash: Add Order Type
- Automation Behavior: Mixed Order
- AR Document Type: Cash Sale/Cash Return
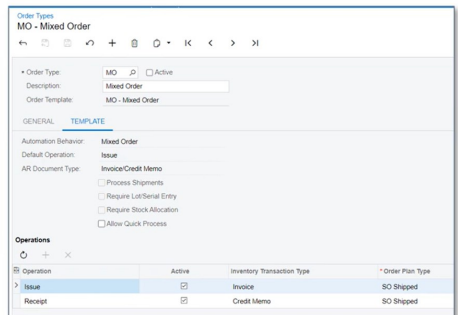
Predefined User Roles

Sales Orders
- SO Admin
- SO Manager
- SO Clerk
- SO Viewer

Purchase Orders
- PO Admin
- PO Manager
- PO Buyer
- PO Clerk
- PO Viewer

Inventory
- IN Admin
- IN Manager
- IN Receiver
- IN Shipper
- IN Clerk
- IN Viewer

Master Data Entry
- Customer Data Manager
- Vendor Data Manager
- Inventory Data Manager

Archive Sales Order & Shipment Documents

Business Need

Over time, a very high volume of transactional documents can lead to performance issues in data-searching operations.

Solution

New Platform feature to archive database records based upon a configurable Archival Policy.

Two entities can be configured to archive: sales orders and shipments.

Value

Improves the performance of daily use of Acumatica ERP in common data-searching operations while allowing access to those records.

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Acumatica Cloud ERP 2023 R1 Spotlight | Distribution

Distribution Improvements

- Blanket PO Improvements
- Disable Automatic Tax Calculation in Sales Orders & Invoices
- Template Items Using Optional Variants
- Multiple Totes Added On-the-Fly for Picking
- Commercial Invoice via ShipEngine Carrier Service
- Added Picking Tab under the review button for pack-only mode in mobile device
- Added Printed Indicator to Sales Orders
- Last Purchase Date Added to Dead Stock Inquiry
- Batch Print Transfer Orders

Blanket Purchase Orders Improvements

Business Need

Track the actual quantity of received items – accounting for partial receipts -- in a Blanket PO.

Added new columns
- Qty. on Orders
- Blanket Open Qty

Updated Rules for Line Completion
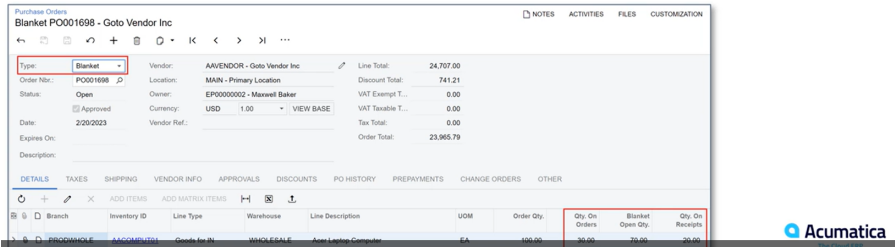
Disable Automatic Tax Calculation in Sales Orders & Invoices

Business Need

When an integrated external eCommerce site calculates sales tax, we need to make sure that the tax rates are correct, i.e. they are calculated for the date captured in the eCommerce system. Also, there should be no discrepancies between the two systems.

Added the ability to preserve taxes calculated or entered in the external system which calculates the tax based upon the rate for that transaction date.

Turn off automatic tax calculation in ERP for these cases.

Disable Automatic Tax Calculation Checkbox added to
- Order Type Configuration
- Sales Order Form
- Invoices Form
- Validated in Commerce-related Forms when Tax Synchronization is checked.
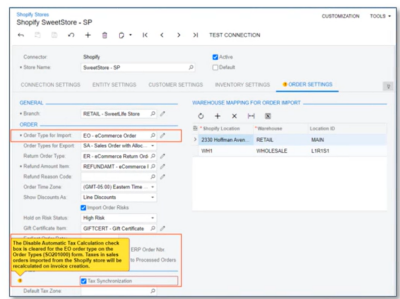
Template Items Using Optional Variants

Business Need

Not all Variants may be applicable to all Template Items within an Item Class. Need a way to reduce the number of Item Classes to best utilize them for item setup and reporting without forcing Template Items to use all of the variants configured in the Item Class.

Variants configured in the Item Class are now Optional for Template Items

Value

- Item Classes can be set up optimally, for example to help with Item Setup and for Reporting by logical groups
- Reduce the numbers of Item Classes needed
- Receive all the benefits of using Template/Matrix items without the pain points around Item Classes
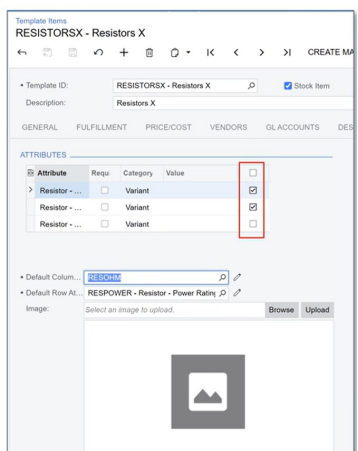
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Acumatica Cloud ERP 2023 R1 Spotlight | Distribution

Multiple Totes Added On-the-Fly for Picking

Business Need

When picking items in a pick list, the quantity and/or size of the items may not fit in a single Tote.

**Pickers can now add Totes to a Picklist on-the-fly during picking.**
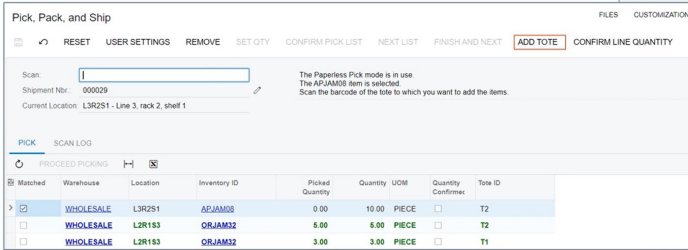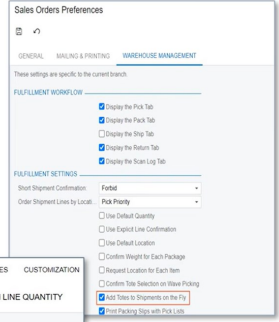
### Commercial Invoice via ShipEngine Carrier Service

Business Need

International shipments must have a commercial invoice document attached to the shipment package in addition to the regular carrier label.

Shipping Clerks need to be able to print these attachments from Shipments for single and multiple Shipments.

Warehouses need the ability to automatically print a commercial invoice at the time the shipment is confirmed on the Pick, Pack, and Ship.
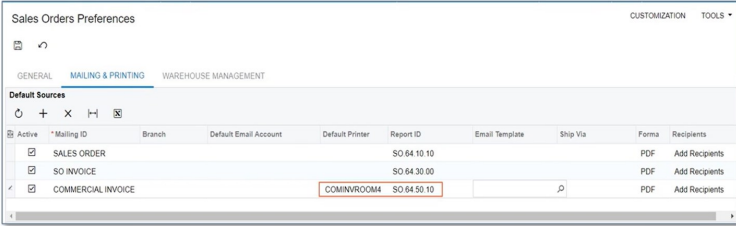
Can print Commercial Invoice from Shipments
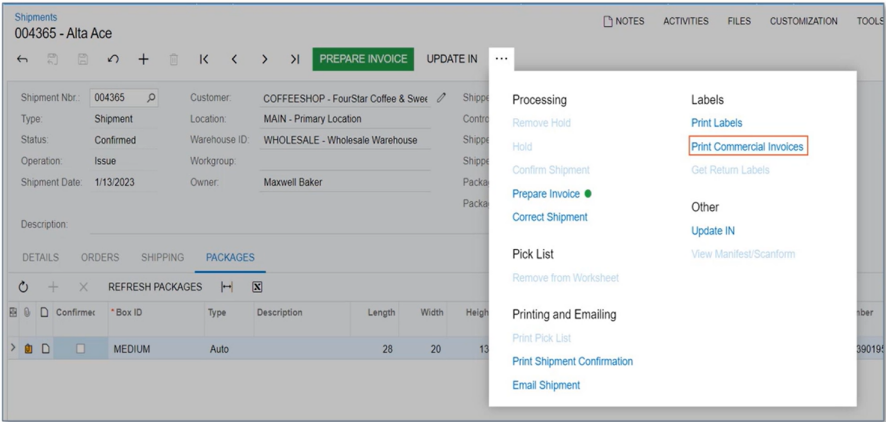
Can print Commercial Invoices automatically at the time a Shipment is confirmed in Pick, Pack and Ship
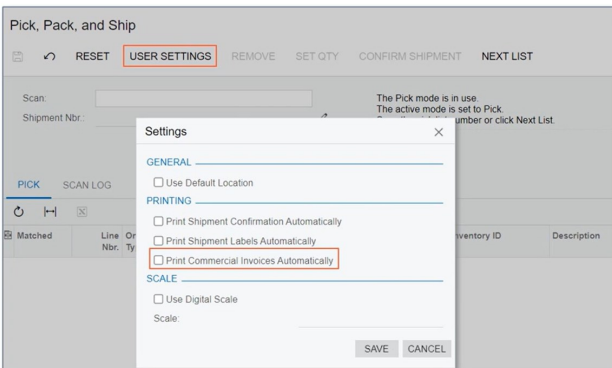
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Acumatica Cloud ERP 2023 R1 Spotlight | Distribution

New Pick Review option for pack-only mode in mobile

Business Need

Packers need a way to view picked items on a Shipment when using Pack-Only mode.

New Pick Review option when in Pack-Only mode

- **Pick Review** option now available on the More menu

- Tapping **Pick Review** displays the picked items, similar to the pick list.

- Clicking a row in this grid shows the picking details of the item

- **Proceed Picking** option on the More menu puts the Picker back to continue picking the item if confirmed quantity was less than ordered.
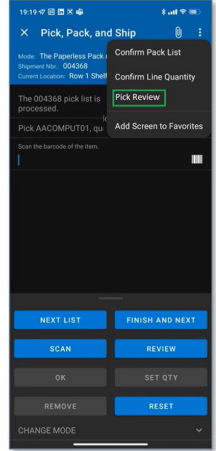
Added Printed Indicator to Sales Orders

Business Need

Ensure that sales orders are not printed more than once.

Added Printed Indicator to Sales Orders

A checkbox called Printed is now on the Financial tab of the Sales Order form.

The system sets the Printed indicator when a sales order is printed. It only prints sales orders that have not been printed based on this setting.
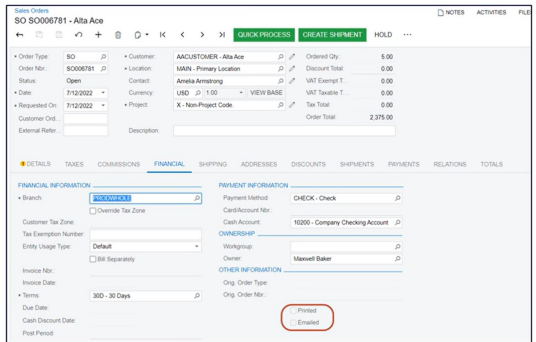
Last Purchase Date Added to Dead Stock Inquiry

Business Need

To be able to consider Last Purchase Date when analyzing deadstock.

Value

Gain insights into purchasing behavior for items that aren't selling

Batch Print Transfer Orders

Business Need

To be able to print/email a number of transfer orders (Sales Order TR type) via the Print/Email Orders form.

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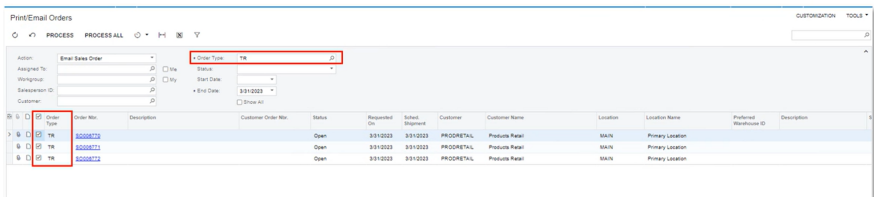
Marketing 101 | eMail Prospecting Doesn't Work
(If Your eMail gets Deleted)

By Kendra Lee

Three Seconds to Impact.

Email prospecting is hot. It feels much less threatening than cold calling. No one will hang up on you. You have time to think about exactly what to write. But it doesn't work if prospects delete your email – and never read a word.

Within three seconds of noticing it, prospects make a decision to read or delete your prospecting email. This is called the **Glimpse Factor**. It is the moment of truth for your prospecting email. Your goal is to breakthrough that first glimpse and compel your prospect to keep reading.

The Glimpse Factor Questions

Here's how the Glimpse Factor works: When prospects first glimpse your email they have three questions at the top of their mind:
- Do I have time for whatever it is now?
- Can I delete it and do nothing at all?
- Do I need to hold on to it to do something later?

Because they are busy people, they're secretly hoping that they can delete it with no further action. Your objective is to craft emails that make contacts feel like they have to read and respond to it immediately. Before you can accomplish that, you have to break past the Glimpse Factor.

Breaking Past the Glimpse Factor Check Points

eMail Address

To make their delete decision, the first place your prospects look is at the email address. They're checking to see who the email is from. If they don't recognize your name and note an email extension from a generic provider such as Gmail or Yahoo, odds are they'll hit delete.

Approach prospects using your company email address. While they may not know your company, it reinforces your credibility and they'll jump to read the subject line.

Subject Line

In the split-second that they read the subject line ,they'll ask and answer "Is this for me personally or is it junk that I can ignore?". They're looking for any excuse to quickly hit delete.

Use subject lines that require prospects to read your email:
- Can we talk Tuesday at 10:30AM
- A quick question
- A thought about IT spending

If your subject line doesn't feel relevant to your contact, it's gone.

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Sales 101 | eMail Prospecting Doesn't Work (cont'd)
(If Your eMail gets Deleted)

By Kendra Lee

Opening Salutation

Next they hop to the opening salutation looking to see if it begins with their name. Including your prospect's name alerts them that the email was sent for them specifically. Without their name, they will discard it.

Signature

While you've made it into the body of the email, your contacts don't yet begin to read. Instead, their eyes drop to your signature at the bottom to check out your authenticity. If they didn't recognize your email address or company, prospects want to find out who you are. They're scanning for marketing hype at the bottom.

It's okay to have links to your social networks and website, even a tag line about your company or a link to a free resource. But a blatant advertisement is their signal that this email isn't one they need to address.

Effort

Prospects' final test is to determine how difficult your email appears. They're assessing to see how much effort it'll take to address. Simply by glimpsing the format of your content, they'll make their decision.

To break through, keep emails brief. Use short paragraphs so they appear quick to address. You may be tempted to use bulleted lists to accomplish this, but resist. In prospecting emails bulleted text implies marketing content or action items, both of which have negative connotations to busy people who don't know you.

Focus On the Glimpse Factor to Improve Response Rates

In just three seconds, your prospects make a choice: read or delete. If you make it past all these checkpoints, they'll finally begin to read the compelling message you've written just for them.

Remember the Glimpse Factor as you compose your messages, and you'll see both your response rates and your new sales pick up steam in no time.

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Movies of Note

Date	Movie
4/5	Mekorma	Mekorma Vendor Validation for Acumatica
4/2	BigCommerce	BigCommerce Success Story: E2X

Acumatica Webinars

Date	Time	Webinar
4/11	1:00 pm CT	Quality Management Fundamentals for Manufacturing, Distribution, and Retail
4/12	1:00 pm CT	Smart Supply Chain Strategies for SMBs
4/13	1:00 pm CT	Building a Solid Foundation for your Construction Business
4/18	1:00 pm CT	Retail Tools to Strengthen Customer Experiences
4/19	1:00 pm CT	Modernize Manufacturing Operations with a Comprehensive, Multi-Modal System
4/20	1:00 pm CT	Reporting: Confessions of Novices and Experts
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

Acumatica Blog

Date	Article
4/4	Acumatica 2023 R1: A True Manifestation of Customer-Driven Innovation

Acumatica Community Discussions of Note

Thread
Nested Kits
Multiple approved manufacturers/part numbers per inventory item
Round currency down to nearest dollar in a generic inquiry
Restriction Group by GL Account options
Use a field with a formula of the Results grid

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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