

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.

International Microvolunteering Day

If you are feeling the urge to give back to your community, but just can't quite seem to get around to starting, then International Microvolunteering Day could be the answer!

The idea of “microvolunteering” is simple: individuals take convenient, bite-sized actions in support of a good cause and often perform their activities or service from home.



While some people might wonder exactly what they can do from home, there are all sorts of local, national and even international options for volunteering without having to leave the house. This could be anything from writing a letter to an elderly hospital patient or something along the lines of tagging internet photos to help the visually impaired.

Some needs can only be filled locally and in person, like sorting recyclable materials, picking up and delivering donated goods, or managing a charitable fundraising event. Other projects can be done online or digitally, such as volunteering to design a logo, fill out a survey or translate a document into another language.

Dad Joke | Volunteering edition

Dad: Did you hear about the knife thrower who started using volunteers as part of this show?

Son: No

Dad: Yeah, they are part of his target audience.

Dad: What do you call a volunteer bricklayer?

Son: What?

Dad: A freemason

Son: My Cub Scout troop is looking for volunteers for our next Pasta Dinner fundraiser, can you help us?

Dad: I'll check my colander and try to set some thyme aside for it.

I tried to find volunteers for a Tug of War game, but the good players just won't come forward.

What did the koala bear from the San Antonio Zoo ask when it was volunteering at a soup kitchen?

“More-soup-y'all?”

HAPPENINGS

ASWi Customer Newsletter

Acumatica Customer Success | CSAT Survey Being Sent

As a reminder, many of you will be receiving an email asking you to complete a satisfaction survey that Acumatica is conducting.

Who Receives the Survey

The person who has been nominated as the “Acumatica Point of Contact” in all organizations that have gone “live” with their Acumatica Cloud ERP instance will be sent an email that has a link to the survey twice a year.

Why Acumatica Sends the Survey

Acumatica uses the valuable input their subscribers share when responding to the survey in Acumatica’s ongoing effort to improve its customer experience.

ASWi

ASWi also uses the results of the survey as a data point to help us understand whether we are meeting our mission of providing our customers with Substantial Value in a way that’s sustainable, scalable and systemic.

Please let me or our Customer Success Manager Keith Wood (keithw@aswius.com) know if you are having any issues with ASWi and/or Acumatica that would prevent you from being able to tell anyone, whether on this CSAT survey, in person or other, that you are completely satisfied with ASWi.

Acumatica User Groups | South Texas Meeting - April 27

The inaugural South Texas Acumatica User Group Meetup is scheduled for April 27th, from 11:00 am to 2:00 pm. It will be held at the offices of MCA Communications at 483 W 38th Street, Houston.

Agenda

Start	Topic(s)
11:00 am	Welcome, South Texas AUG Board introductions and Overview.
11:20 am	Acumatica Usability Cases: Microsoft Power BI, BigCommerce.
Noon	Working Lunch.
12:30 pm	Acumatica 2022R2 Overview and Product Roadmap.
1:00 pm	Group member introductions.
1:30 pm	South Texas Acumatica User Group Roundtable open forum.

Who’s Invited

Any and all Acumatica & ASWi customers, independent of your location, are welcome, invited, and encouraged to attend the Meetup.

How to Register for the Event

You can register for the event [here](#).

ASWi Customer Newsletter

Acumatica Cloud ERP Free Online Training | F230 SubAccounts, Budgets and Allocations

Audience

This course is designed for consultants who intend to learn how to use the Subaccounts, Budgets, and Allocations in Acumatica ERP.

Acumatica ERP Experience Required

3-6 months

Who Should Attend (relationship to Acumatica)

Professionals who want to learn Acumatica ERP.

Acumatica ERP version used in training

2022 R2

Training Description

This webinar demonstrate the configuration of subaccounts and automatically combined subaccounts in Acumatica ERP and the processing of transactions and documents with subaccounts. Also, it introduces two types of budgets and how they can be prepared in the system. The last part of the webinar, walks you through processing allocations in the system.

Training Syllabus

The program is covered over four days as follows:

- **Day 1: Subaccounts.** During this session, you'll learn how to enable subaccounts, modify the predefined segmented key, specify values for subaccount segments, create a GL batch with subaccounts, release the batch, check a report to see what changed, split up a wrongly posted transaction into multiple correcting transactions, set up subaccount masks for different types of documents.
- **Day 2: Subaccounts and Budgets.** In this session, you'll learn how to process an AP bill when subaccounts are combined, how to review a report that breaks it down by subaccount. You'll also learn how to create a budget ledger. Create a budget based on an uploaded budget, release the modified budget, compare the original and modified budget, budget tree elements, and how to customize a budget tree.
- **Day 3: Budgets.** This session teaches you how to configure access rights for multiple users using restriction groups, how to convert a simple budget into a hierarchical one, how to make a hierarchical budget more manageable by adding articles, and how to make a new report definition by copying the Profit and Loss report, and how to update the columns and data sources. You'll also learn how to upload actual data to be compared with budgeted data, run the ARM report and compare budget and actual data, modify the amount of existing budget articles, and add new budget articles.
- **Day 4: Allocations.** How to setup an allocation rule so amounts are distributed depending on user-defined coefficients (weights), and setup an allocation rule so amounts are distributed accordingly on percentages. Set up an allocation rule that distributes money based on a dynamic ratio of the balances in the accounts to date. This will enable you to set up an allocation rule based on budget data.

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Acumatica Cloud ERP Free Online Training | F230 SubAccounts, Budgets and Allocations (con'td)

Dates and times

This training meets the following four times, and attendees are expected to attend all four sessions:

- Monday, April 24 Noon to 1:00 PM CT
- Tuesday, April 25 Noon to 1:00 PM CT
- Wednesday, April 26 Noon to 1:00 PM CT
- Thursday, April 27 Noon to 1:00 PM CT

Registration URL

https://webinar.ringcentral.com/webinar/register/1816790477968/WN_gQJo0CGkRZez-_klsdTJtw

Note

To provide a cloud instance for attendees, Acumatica will need to generate a registration report and perform some activities to deploy the instance and send out the credentials. All this takes time and Acumatica needs to do it several hours before the webinar. They therefore recommend not leaving the registration up to the last minute of the webinar start. Everyone who registers after 8 AM CT of Day 1 session will not receive the link to the cloud instance and credentials for it and will have to attend a webinar in a view-only format.

Prerequisites

For this training, you should be familiar with the basic business processes that can be performed in the general ledger, as well as the accounts receivable and accounts payable subledgers. To familiarize yourself with the basic configuration and processes that are performed in the finance functional area, Acumatica recommends that you first take the F100 Financial Basics course that is found on [Acumatica Online University](#).

Advance Preparations

None. Attendees will be provided with a cloud instance and tenant for training purposes.

Training Materials

Please download the following training materials that you will need for the training:

- Training guide: [F230 Subaccounts, Budgets, and Allocations 2022 R2.pdf](#)
- Files for training: [F230 Files for Training](#)

Continuing Professional Education*

- Program knowledge level: Intermediate
- Delivery method: Group Internet based program*
- NASBA field of study: Computer Software & Applications
- Maximum number of CPE credits that may be earned by the participant: 4

* CPE credits are available for this course if you attend in the format of online instructor-led RingCentral session by sending a request to training@acumatica.com after the session is complete.

Acumatica Cloud ERP 2023 R1 Spotlight | Construction

Report Improvements

Project Balance
Project Profitability
Project Profit Analysis
Project Performance
Project Cost Budget Status
Project List
Project Tasks
Employee Hours
Employee Hours by Project and Task

Projects Pending Billing
Project Transactions
Project Cost History
Project Budget Forecast by Month
Subcontract Summary
Subcontract Details by Vendor
Subcontract Audit
Subcontract Payment

WIP Report
WIP Report by Date Range
Project Progress Reporting
AR Aging by Project
AP Aging by Project

Problem Statement

Many reports created with initial release several years ago, provided limited information and structure.

Solution:

Reports were reviewed and aligned with current standards (e.g., Fonts, Alignment, Titles)

Report parameters enhanced

Rework of project WIP reports

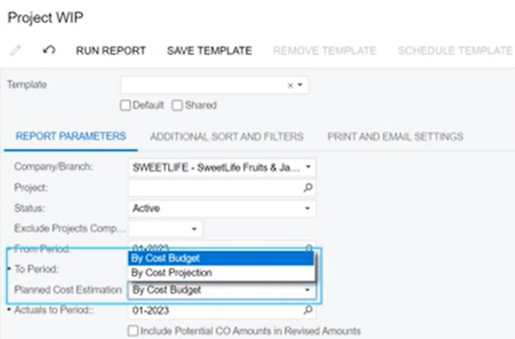
Previous 4 WIP reports were combined into 2 reports.

Project WIP (PM651000) was combined with Project WIP with Date Range (PM651500) into one summarized report Project WIP (PM651500).

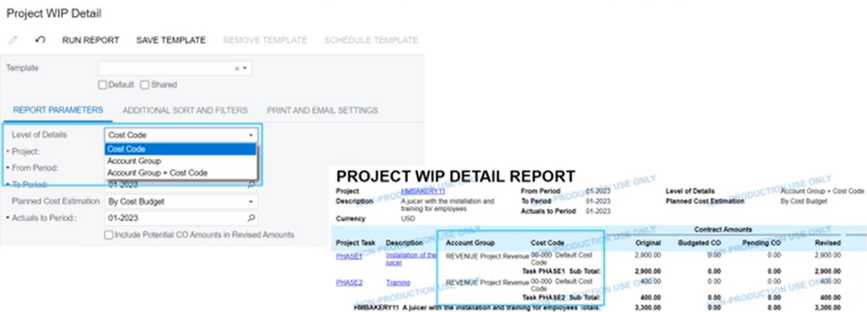


Changes in the Project WIP report

Both reports include a new parameter **Planned Cost Estimation** and new column on report layout to display projected costs were added. Now it is possible to use budgeted or planned (from Cost Projection) costs for ratios calculated in the report.



In the Project WIP Detail (PM652500) report a new parameter **Level of Details** was added. Now it is possible to choose level of detail of report lines (Cost Code, Account Group or both)



In both reports we added information about currency and general information (date, page number) in the report header, show report parameters.

PROJECT WIP REPORT

Company/Branch: SWEETLIFE - SweetLife Fruits & Ju...
 Show Projects with Status: Active
 Exclude Projects Completed Through Date: 01-2023
 From Period: 01-2023
 To Period: 01-2023
 Actuals to Period: 01-2023
 Planned Cost Estimation: By Cost Budget
 By Cost Budget

Project	Description	Status	Project Currency	Contract Amounts			
				Original	Budgeted CO	Pending CO	Revised
0001	bb01	Active	EUR	2,000.00	0.00	0.00	2,000.00
Total:				2,000.00	0.00	0.00	2,000.00
HMBAXRY11	A jucer with the installation and training for employees	Active	USD	3,300.00	0.00	0.00	3,300.00
HMBAXRY12	Installation of jucers and training for employees	Active	USD	0.00	0.00	0.00	500.00

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Acumatica Cloud ERP 2023 R1 Spotlight | Construction

In both reports we changed billing amount calculation. Now reports show only amounts generated by AR invoices.

Actual						
Period	Costs to Period	% Budget Used	% Completed	Period Billings	Billings to Period	Revenue Recognized
100.00	100.00	10.00 %	10.00 %	400.00	400.00	150.00
100.00	100.00	10.00 %	10.00 %	400.00	400.00	150.00
0.00	0.00	0.00 %	0.00 %	0.00	0.00	0.00
0.00	0.00	0.00 %	0.00 %	0.00	0.00	0.00
100.00	100.00	5.00 %	5.00 %	400.00	400.00	175.00

In both reports we added a new parameter **Include Potential CO Amounts in Revised Amounts**. This checkbox determines if the report should include or not include amounts from pending change orders (changed orders with Open status) in revised amounts.

Project WIP Detail

PRINT SEND EXPORT

REPORT

From Period	01-2024	Level of Details	Planned Cost Estimation	Cost Code	By Cost Budget
To Period	01-2024				
Actuals to Period	01-2024		<input checked="" type="checkbox"/> Potential CO Amounts Included		

	Contract Amounts			Estimated Costs		
	Original	Budgeted CO	Revised	Original	Budgeted CO	Revised
fault Cost Code	1,500.00	0.00	1,500.00	3,000.00	1,000.00	0.00
Task TASK1 Sub Total:	1,500.00	0.00	1,500.00	3,000.00	1,000.00	0.00
fault Cost Code	2,000.00	0.00	0.00	2,000.00	1,000.00	0.00
Task TASK2 Sub Total:	2,000.00	0.00	0.00	2,000.00	1,000.00	0.00
AAA1 aaa 1 Totals:	3,500.00	0.00	1,500.00	5,000.00	2,000.00	0.00

Project Progress Report

Benefits

- Progress Worksheets released in 2022 R2, tracking units complete for project performance

Features

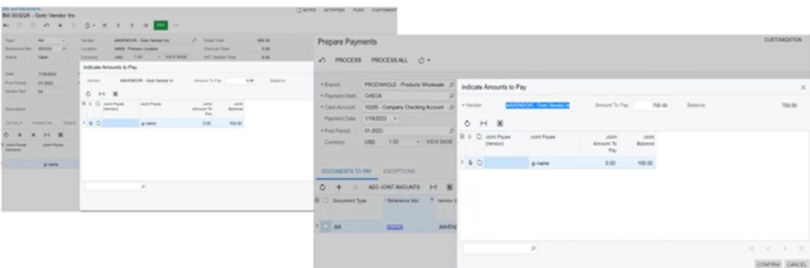
- New section on Daily Field Report
- Project Progress Report

DAILY FIELD REPORT									
Company	System Test Products	Page	1 of 1						
Customer: T&E Billing Example	Project ID: CSTR0001	Project Address:	301 East 10th St, Ames, IA 50010						
Site: 1000000000	Project Name:	Project Manager:	John Doe						
Site Manager: J.Doe@acumatica.com	Project Start:	Project End:	1/15/2023 12:00 PM						
Site Contact: J.Doe@acumatica.com	Project Status:	Project Type:	Construction						
LABORERS & ACTIVITIES									
Employee	Working Type	Project Task Code	Time	Spent	Billable Time	Description	Last Modified By	Last Modified Date	
2000000001	EL	01	8:00 AM	8:00 AM	8:00 AM	OPERATOR	admin	1/15/2023 12:00 PM	
2000000002	EL	02	8:00 AM	8:00 AM	8:00 AM	OPERATOR	admin	1/15/2023 12:00 PM	
2000000003	EL	03	8:00 AM	8:00 AM	8:00 AM	OPERATOR	admin	1/15/2023 12:00 PM	
PROJECTS WORKSHEETS									
Worksheet No.	Project Task ID	Amount Group	Description	Unit	Completed Qty.	Total Completed Qty.	Unit Budgeted Qty.		
01	01	EL	OPERATOR	EL	100.00	100.00	100.00		
02	02	EL	OPERATOR	EL	100.00	100.00	100.00		
03	03	EL	OPERATOR	EL	100.00	100.00	100.00		

Project Task	Group	Description	Unit	Total Completed Qty.	Current Period Completed Qty.	Total Remaining Qty.	Total Current Period Remaining Qty.	Total % Completed	Total % Current Period
EL	LABOR	Concrete Forming	HOURL	3,000.00	2,000.00	1,000.00	66.67 %	66.67 %	
	MATERIAL	Concrete Forming	LF	1,200.00	250.00	950.00	20.83 %	20.83 %	
	LABOR	Concrete Reinforcing	HOURL	50.00	50.00	0.00	100.00 %	100.00 %	
	MATERIAL	Concrete Reinforcing	SF	7,000.00	2,200.00	4,800.00	31.43 %	31.43 %	
	LABOR	Concrete CIP Slabs	HOURL	40.00	20.00	20.00	50.00 %	50.00 %	
	MATERIAL	Concrete CIP Slabs	CY	75.00	20.00	55.00	26.67 %	26.67 %	

Enhanced Joint Payment Functionality: Problem Statement (before 23R1)

- To create a joint check user had to manually enter amounts to pay for each joint payee and the main vendor on the Indicate Amount to Pay pop-up window (= extra step from the user side)
- There were two different workflows for manual bill processing on the Bills and Adjustments (AP301000) form and the mass processing on the Prepare Payments (AP503000) form.



Enhanced Joint Payment Functionality: Workflow update

Each joint payee from a bill result into a separate line on the Prepare Payments (AP503000) form:

Bill	Vendor	Amount	Joint Payee	Amount
8000000001	AMENDOR - Gals Vendor Inc	3,000.00		
			AMENDOR - Gals Vendor Inc	2,000.00
			AMENDOR - Gals Vendor Inc	1,000.00

Bill	Vendor	Line	Amount	Joint Payee	Amount
8000000001	AMENDOR - Gals Vendor Inc	1	1,000.00		
				AMENDOR - Gals Vendor Inc	1,000.00
				AMENDOR - Gals Vendor Inc	1,000.00

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Acumatica Cloud ERP 2023 R1 Spotlight | Construction

Scenario 1: Pay joint payee bill on the Bills and Adjustments (AP301000) form

- Program navigates to **Prepare Payments (AP503000)** screen (*previously it was Checks and Payment (AP302000)*)
- **Amounts Paid** are defaulted by an open balance
- User can increase/decrease/clear **Amount Paid** (this is an existing logic)

The screenshot shows the 'Bills and Adjustments' form for 'AMERDOOR - Gals Vendor Inc'. A red box highlights the 'Amount Paid' field, which is set to 100.00. An arrow points from this field to the 'Prepare Payments' screen. In the 'Prepare Payments' screen, a table lists bills to be paid:

Bill	Vendor	Amount Paid	Joint Payee	Amount	Balance
AMSERVICES	AMSERVICES	100.00	AMSERVICES	100.00	100.00
AMERDOOR	AMERDOOR	200.00	AMERDOOR	200.00	200.00

Scenario 2: Mass bill payment with a grouping on the Prepare Payments (AP503000) form

- Select lines you want to pay in **Prepare Payments (AP503000)** form
- Review and adjust **Amounts Paid** if need
- Bills with the same vendor will be grouped into one check (if **Pay Separately = OFF**)
- Joint payee lines with the same **internal** vendor will be grouped into one check (if **Pay Separately = OFF**)
- For joint payee lines with the same **external** vendor a separate check is always created

The screenshot shows the 'Prepare Payments' form with a table of bills to be paid:

Document Type	Reference Nbr	Vendor ID	Line	Vendor Name	Amount Paid	Joint Payees	Joint Payee Name	Amount	Amount Cleared	Joint Balance	Cash #
Bill	002222	AMERDOOR	1	Gals Vendor Inc	890.00		Gals Vendor Inc	0.00	0.00	0.00	
Bill	002222	AMERDOOR	2	Gals Vendor Inc	200.00		American Door &	200.00	200.00	0.00	
Bill	002228	AMERDOOR	2	Gals Vendor Inc	1,800.00		Gals Vendor Inc	0.00	0.00	0.00	
Bill	002228	AMERDOOR	1	Gals Vendor Inc	150.00		JP Amalgam	150.00	150.00	0.00	
Bill	002228	AMERDOOR	1	Gals Vendor Inc	850.00		Gals Vendor Inc	0.00	0.00	0.00	
Bill	002228	AMERDOOR	2	Gals Vendor Inc	200.00		American Door &	200.00	200.00	0.00	
Bill	002228	AMERDOOR	2	Gals Vendor Inc	1,300.00		Gals Vendor Inc	0.00	0.00	0.00	

Add a new parameter for level of grouping payment into lien waiver

- A payment could include several bills related to different projects, project tasks, and commitments
- There is the new parameter **Calculate Amount By** on the **Compliance Preferences (CL301000)** form to define the level of grouping payments for a lien waiver

Compliance Preferences

The screenshot shows the 'Compliance Preferences' form with the 'Calculate Amount By' dropdown menu open. The dropdown options are: Project, Commitment, Project Task, Project, Project Task, Project.

- To review bills covered by lien waiver payments there is the **Line Details** button on **Compliance** tab of the **Bills and Adjustments (AP301000)**, **Checks and Payments (AP302000)** form, **Vendors (AP303000)**, **Projects (PM301000)**
- Users can view linked documents of the selected lien waiver

The screenshot shows the 'Line Details' form with a table of bills and a 'Line Details' window. The table lists bills with their amounts and payment dates:

Document Type	Document Category	Created Automatic	Project	Lien Waiver	AP Payment Amount (Vendor)	AP Payment
Lien Waiver	Conditional Partial		PR00000020	1,000.00	Payment_002072	
Lien Waiver	Conditional Partial		PR00000021	2,500.00	Payment_002072	

The 'Line Details' window shows the following information:

AP Doc Type	AP Reference Nbr.	Currency	Amount Paid
INV	003243	USD	2,500.00

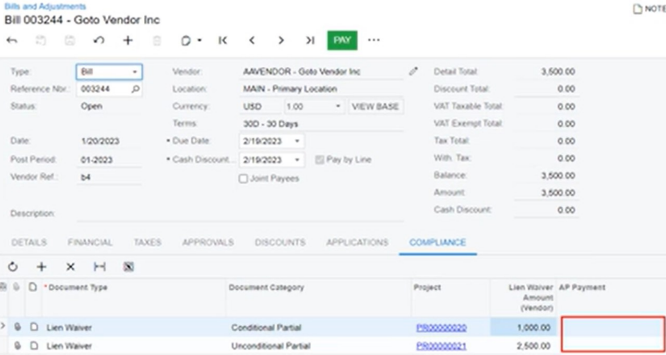
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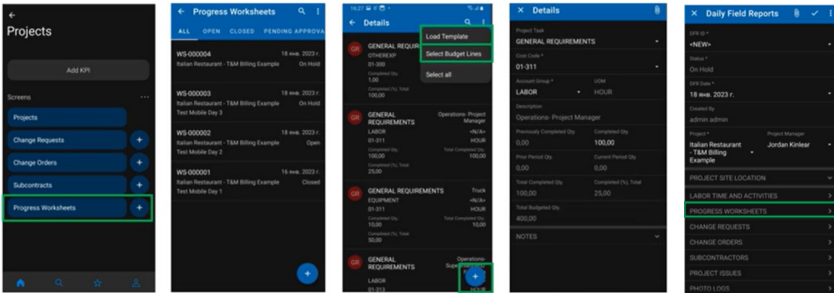
Acumatica Cloud ERP 2023 R1 Spotlight | Construction

Allow printing manually created lien waiver and lien waiver without link to payment

- User can add lien waiver manually for a not paid bill on Bills and Adjustments (AP301000)
- User can print lien waiver using a corresponding report form depending on a lien waiver type

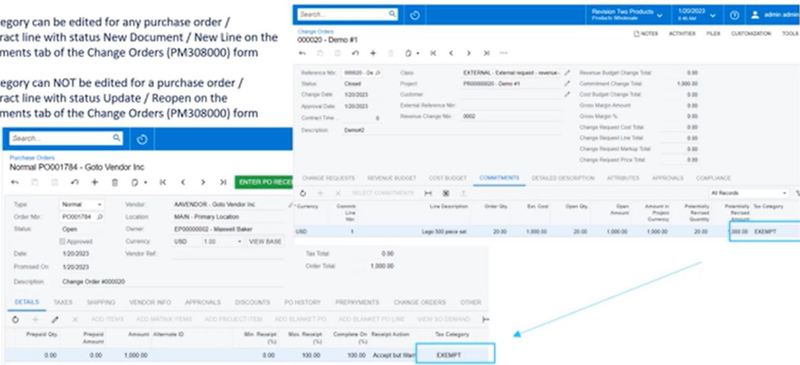


Progress Worksheets in mobile application



Tax Category on the Commitments tab of the Change Orders form

- Tax Category attribute is defaulted from the inventory item if any, otherwise – empty
- Tax Category can be edited for any purchase order / subcontract line with status New Document / New Line on the Commitments tab of the Change Orders (PM308000) form
- Tax Category can NOT be edited for a purchase order / subcontract line with status Update / Reopen on the Commitments tab of the Change Orders (PM308000) form



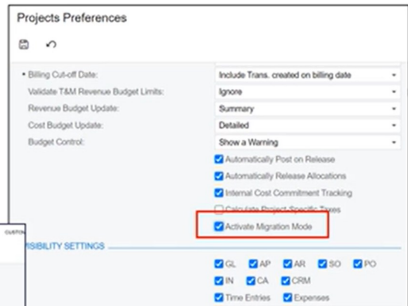
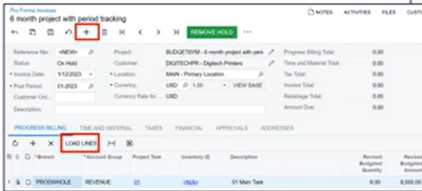
ProForma Import

Benefits

- Replace manual processes and customization with core workflow

Features

- Checkbox added to Projects Preferences for Migration Mode
- Ability to manually create and modify ProForma invoice details



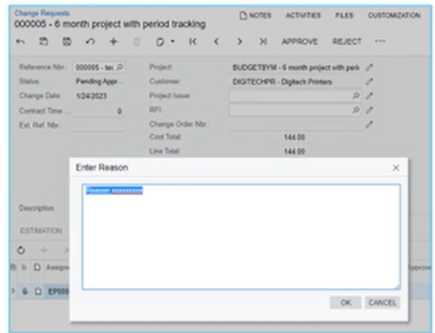
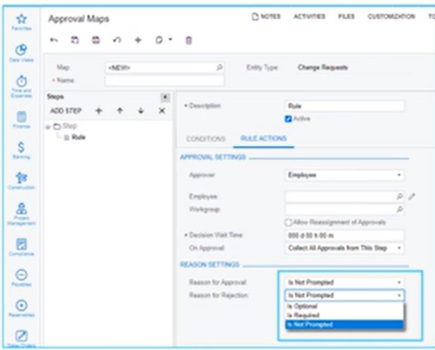
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Acumatica Cloud ERP 2023 R1 Spotlight | Construction

Approval map Reason fields for the Change Request and Daily Field Report

Feature/Benefit: Allow users to enter reason for Approval Map Rule



Projected Cost Improvements

Benefits

- Project Managers forecast the current state of their projects, which will be used by the finance group to determine how much to bill, revenue recognition and produce WIP & Bonding Reports.

Features

- Project Impact Summary during Cost Projections
- Ability to enter variances
- Ability to run WIP Report from Cost Projection Entry
- Use Projections within WIP Report

Project-Specific Inventory changes. Technical Changes

Technical redesign of cost layers (migration to cost centers) on the side of Distribution team has allowed us getting rid of duplicate inventory tables and migrating Project-Specific Inventory data to the standard Distribution database tables.

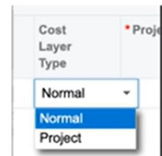
Database Changes

- The tables *INSiteStatus*, *INLocationStatus*, *INLotSerialStatus* are obsolete and no longer used, replaced with the tables *INSiteStatusByCostCenter*, *INLocationStatusByCostCenter*, *INLotserialStatusByCostCenter* accordingly
- The tables *PMSiteStatus*, *PMLocationStatus*, *PMLotSerialStatus* are obsolete and no longer used, now *INSiteStatusByCostCenter*, *INLocationStatusByCostCenter*, *INLotserialStatusByCostCenter* accordingly reference *INCostCenter* table which stores project key and project-specific items info
 - Now *INSiteStatusByCostCenter*, *INLocationStatusByCostCenter*, *INLotserialStatusByCostCenter* can indicate virtual partition of stock items by the project and project task within a warehouse, warehouse location
- The table *PMCostCenter* is obsolete and no longer used. *INCostCenter* is a new table to generate cost sites for the project specific cost layers that can be tracked by project and project task, as well as other specific cost centers

Project-Specific Inventory changes. Functional Changes

Cost Layer Type selection is introduced on:

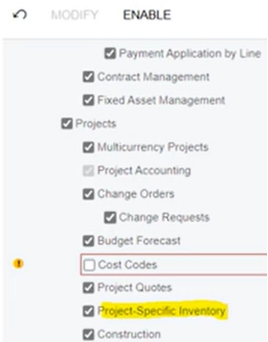
- Receipts (IN301000)
- Issues (IN302000)
- Transfers (IN304000)
- Adjustments (IN303000)



Cost Layer Type = Project must be selected for projects with Inventory Tracking = Track by Project Quantity and Cost.

Cost Layer Type = Normal to be selected for projects with Inventory Tracking = Track by Location / Track by Project Quantity need

Enable/Disable Features



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.

April 15, 2023

HAPPENINGS

ASWi Customer Newsletter

Sales 101 | Improve Your Voicemail CallBacks

By Mike Brooks

It happened just this second...

I checked my voicemail and found two messages. One was from a business owner who wanted to speak to me about training for his sales team. The other was a vague message from someone named, "Ty" who just said, "Hey Mike this is Ty; call me back when you can. . . "

Now here's the problem:

They both left their phone numbers so quickly that I had to listen back to the message four times - all the way to the end, by the way - before I was able to write down their whole number.

Guess which one I did all that work for and which one I deleted? Yep - the business prospect, of course. But, even then, I didn't want to. I mean, why should I have to listen to a message four times, just to write their phone number down?

If you're leaving voice messages and not getting call backs, consider whether you're making it hard for your prospects to write your number down.

If you've identified yourself as a sales rep (like in the second example above. . . where do I start?!), then there's no way someone is going to go through the hassle of replaying your message to figure out your number.

So here is the quick fix: **Leave your phone number SLOWLY and twice** so your prospect doesn't have to replay your message a bunch of times.

It's the simplest way to give yourself the best chance of being called back!

ASWi HAPPENINGS

ASWi Customer Newsletter

Movies of Note

Date	Movie
4/11	SourceDay Tactical Side of ERP Implementation Success
4/11	SourceDay Having the Right People During an ERP Integration
4/11	SourceDay The Challenges Created by Dirty Data

Acumatica Webinars

Date	Time	Webinar
4/18	1:00 pm CT	Retail Tools to Strengthen Customer Experiences
4/18	1:00 pm CT	IIG AcuContainer Tracking Enhancement
4/19	9:00 am CT	The BPR How Paper Documents Are a Security Risk
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
4/12	Acumatica Customization Plug-Ins and Testing
4/11	Acumatica 2023 R1: Why Exceptional ERP Usability Matters
4/8	ASWi Manufacturing Management System Evaluation Checklist
4/6	ASWi Field Service ERP Evaluation Checklist

Acumatica Community Discussions of Note



Thread
Convert Item from Finished Good to Kit Assembly Finished Good
Vendor RFP - Quote for One Item at Different Quantities
Add Single Item to Multiple BOMs
Phone Number Masking - Extensions
Alphanumeric Masking - Attributes

April 15, 2023

ASWi HAPPENINGS

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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

