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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. 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.

## 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?"



# 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 <u>here</u>.

## 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.



# 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 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 <u>Acumatica Online University</u>.

#### **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: <u>F230 Subaccounts, Budgets, and Allocations 2022</u> <u>R2.pdf</u>

- 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.

#### ASWi Customer Newsletter

# Acumatica Cloud ERP 2023 R1 Spotlight | Construction

Report Improvement	S Problem Statemer Many reports created w release several years a limited information and	with initial ago, provided
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WP Rep WIP Report by D Project Progress AR Aging by I AP Aging by I	ate Range Reporting Project	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).

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#### **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.

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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)

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

#### PROJECT WIP REPORT

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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.

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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.

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#### **Project Progress Report**

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#### 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.

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#### Enhanced Joint Payment Functionality: Workflow update

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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)

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#### 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 <u>internal</u> vendor will be grouped into one check (if **Pay Separately** = OFF) For joint payee lines with the same <u>external</u> vendor a separate check is always created
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#### 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 .

UEN WAVER SETTINGS	LIEN WAVER MAILING & PRIN	(TING	CUSTOM ATTRIBUTES CO	MMON ATTRIBUTES				
ACTIONS FOR OUTSTANDING	UEN WAVERS							
Warn Users During AP Bill I	Entry							
Warn Users During Bill Sele	ction for Payment				Calculate Amount By:	Project		
Prevent AP Bill Payment						Commitment, Project, Project		
CONDITIONAL LIEN WAIVERS		_	UNCONDITIONAL LIEN WAVE	RS		Commitment, Project Project, Project Task Project		
Automatically Generate Lie	n Waivers		Automatically Generate Lier	Waivers				
Generate for AP Document	s Not Linked to Commitments		Generate for AP Documents	Not Linked to Commitments		Project		
Generate Lien Waivers on:	Paying AP Bill		Generate Lien Waivers on:	Paying AP Bill				
Through Date:	Posting Period End Date	*	Through Date:	AP Payment Date				
Calculate Amount By:	Project		Calculate Amount By:	Project				

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 •

I	DO	DOCUMENTS TO APPLY APPLICATION HISTORY FINANCIAL APPROVALS REMITTANCE C									Det	tails		×		
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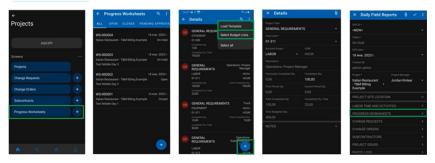


#### Acumatica Cloud ERP 2023 R1 Spotlight | Construction Allow printing manually created lien waiver and lien waiver without link to payment

- · 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

	841 -	Vendor:			to Vendor Inc	/ Detail			0.00	
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#### 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 Commitment Is also of the Change orders (PM308000) form: • Tax Category can NOT be edited for a purchase order / subcontract line with status Update / Reopen on the commitment Is also of the Change Orders (PM308000) form: • Tax Category can NOT be edited for a purchase order / subcontract line with status Update / Reopen on the commitment Is also of the Change Orders (PM308000) form: • Tax Category can NOT be edited for a purchase order / subcontract line with status Update / Reopen on the commitment Is also of the Change Orders (PM308000) form: • Tax Category can NOT be edited for a purchase order / subcontract line with status Update / Reopen on the commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Category Commitment Is also of the Change Orders (PM308000) form: • Tax Cat

#### ProForma Import

#### Benefits

**a** 0 Replace manual processes and customization with core workflow Billing Cut-off Date Validate T&M Rever Ignore Summary Features Revenue Budget Update Cost Budget Up Checkbox added to Projects Preferences for Migration Mode Ability to manually create and modify ProForma invoice details 0 CA CRM 
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Projects Preferences

#### ASWi Customer Newsletter

# 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

Approval Maps		ACTIVITIES FLES CUSTON	Denow Too		onth project with			ACTIVITIES FLES	
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+ Name				Status	Panding Appr	Customer.	CHOITECHER - C	Splech Printers	1
Steps (K)				Change Date:	1242023	Project hour		p	1
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	APPROVE METTINGS	-				Line Total		144.00	
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	Wodgroep		p.	Description.					
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		Is Optional							COUNCER

#### **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, INLotS erialStatusByCostCenter accordingly
- The tables PMSiteStatus, PMLocationStatus, PMLotSerialStatus are obsolete and no longer used, now INSiteStatusByCostCenter INLocationStatusByCostCenter, INLotSerialS tatusByCostCenter accordingly reference INCostCenter table which stores project key and project-specific items info
  - Now INSiteStatusByCostCenter INLocationStatusByCostCenter, INLot
     SerialStatusByCostCenter 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 Laver Type selection is introduced on:

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

Layer Type

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

Payment Application by Line Contract Management Fixed Asset Manageme Projects Multicu Project Accounting Change Orders Change Red Budget Forecast Cost Codes Project Quotes Construction

Enable/Disable Features \$ MODIFY ENABLE

#### ASWi Customer Newsletter

# 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.



# 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!



#### **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 Comprehen- sive, 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 Acumat- ica 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



Convert Item from Finished Good to Kit Assembly Finished GoodVendor RFP - Quote for One Item at Different QuantitiesAdd Single Item to Multiple BOMsPhone Number Masking - ExtensionsAlphanumeric Masking - Attributes

ASWi Customer Newsletter

# Calendar of Events

Date	Event/Activity	Notes
5/10 - 12	AICPA CFO Conference	Salt Lake City, UT. <u>Register Here</u> .
6/14 - 15	Retail Innovation Conference	McCormick Place, Chicago, IL. <u>Register Here.</u>
6/21 - 23	CICPAC Annual Conference	Chicago, IL <u>Register Here</u> .
7/15 - 19	CFMA Annual Conference	Aurora, CO <u>Register Here</u> .
7/30 - 8/1	RetailNOW 2023	Orlando, FL <u>More Info</u> .
9/11 - 13	Pack Expo International 2023	Las Vegas <u>More Info</u> .
9/11 - 14	FABTECH 2023	Chicago, IL <u>More Info</u> .
9/18 - 20	PROCORE Groundbreak	Chicago, IL <u>More Info</u> .
10/31 - 11/3	SEMA 2023	Las Vegas, NV

# ASWi | Our Values, Mission & Focus

