



Be a Southware Genius

SPA2020 Southware User Conference

Hidden Gems

What to expect?

- This segment will not be teaching “how”, but will briefly touch on often overlooked features.
- Four of us will take turns in introducing our favorites based on items that we feel have helped our client’s efficiency.
- If you see something, **make a note** so you can follow up with your admin staff or your partner to set up for you.

Hidden Gems Behind the Scenes

- My session will cover some administrative functions that exist mostly in the SwiftMate environment.
- SwiftMate is the system Manager that allows administrative staff to tune core functions to improve and customize each users access and experience.

Hidden Gems Security

- SouthWare Standard level security is by User Login setting access levels for each Module. These can vary from No access (0) to total control (9). Often in larger organizations, this “broad stroke approach” is not adequate.
- Within each module there are also “Transaction Operator Controls” that allow very detailed control over specific Transactional functions.
- The following will show some other ways to enhance security beyond the limits of Transactions.

Hidden Gems Security

Salesperson or Location Limiting.

COMPANY WIDE SO AFFECTS ALL PROGRAMS/SCREENS!

- Any Operator record can be limited to access only those records that match their code. As an example, the login record can restrict a salesperson to only see their own assigned customers or orders.
- BUT – Salespersons and Locations can be grouped, so the limit can be applied to allow access to more than a single Salesperson/Location

Hidden Gems Security

XX-03-02 SouthWare Excellence Series (DM/) DEMO Company
File Edit Approx Search Next Previous Enter Options Breakout Link Help

Operator Information Maintenance

*1. Operator ID	DEMOW		
2. Password	*****	Expire Date:	00/00/00
3. Operator Name	DEMO OPERATOR		
4. Company ID	DM/	DEMO Company	
5.+Logging Flags	Log Logons / Errors	Log FM	
6. GUI Configuration ID	WNT		
7. User Group Access	***	Access To All User Groups	
8.+Special Security			
9.+Default Transaction Oper			
10.+ Profile Preferences			
11. Logon Default Profile	*Default		
12.+Security Levels			
13.+Other Info			
14. Secured Location ID	GA	002 003	
15. Secured Salesperson ID	JKW	Janet Wilson	

to change

OK Cancel

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Web Menu SwiftMate Operator Maintenance

Hidden Gems Security

XX-03-08-02 SouthWare Excellence Series (DM) DEMO Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Location Security Xref Maint

Secured ID to Maintain: GA

Access?	Orig	Loc Code	Location Desc
<input type="checkbox"/>	N	001	Demo Company
<input checked="" type="checkbox"/>	Y	002	Warehouse # 2
<input checked="" type="checkbox"/>	Y	003	Location 003
<input type="checkbox"/>	N	901	Truck Rental location-901

Operators Abandon Finish

DEMO 08/30/20 8901

Hidden Gems Security

Override Security for a Particular Program.

- Can be used to raise or lower built in program security.
- Can be ALL users (company wide), or restricted to specific users.
- Generally lowering security will be more likely to limit to one operator

Hidden Gems Security

XX-03-04 SouthWare Excellence Series (DM/) DEMO Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Maintain Override Security

*1. Program ID	ARSMANN	
*2. Company ID	DM/	
*3. Operator		All Operators
4. Access Override Level	9	
5. Add Override Level	9	
6. Change Override Level	9	
7. Delete Override Level	9	
8. Extract ID		
9. Active?	N	

to change

OK Cancel

DEMO	08/30/20	92
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Web Menu Override Program Security

Hidden Gems Security

XX-03-04 SouthWare Excellence Series (DM/) DEMO Company
File Edit Approx Search Next Previous Enter Options Breakout Link Help

Maintain Override Security

*1. Program ID	SWCCMGR
*2. Company ID	DM/
*3. Operator	DEMOW
4. Access Override Level	6
5. Add Override Level	7
6. Change Override Level	7
7. Delete Override Level	9
8. Extract ID	
9. Active?	Y

to change OK Cancel

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Web Menu Override Program Security

Hidden Gems Security

- This is not all you can do, but introduces some concepts and ideas.
- The WorkFlow tool on Traditional Screens and the NetFlow tool on Portal screens can also be used with far more flexibility to use change how data can be changed or seen.

Hidden Gems

Modifying screens

- Portals is the ultimate “screen customizer”.
- Portals extracts data and presents it in a Web framework utilizing Java tools for presenting the data. Therefore any competent web developer has access to understand and edit these screens.
- Combined with Netflow, these changes can be added selectively and can be deactivated simply should you wish to test with and without the change.

ASK YOUR PARTNER ABOUT NETFLOW

Hidden Gems

Modifying screens

- For the traditional screens, Field Filters and Screen Overrides are available.
- Field filters have many functions, but one of the most useful is to limit data entry in a specific field.
- Screen Overrides are a way of changing the text displayed in the format of the screen.

Hidden Gems Modifying screens

XX-09-07-01 SouthWare Excellence Series (DM/) DEMO Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Field Filter Maintenance

*1. Filter Number	4
2. Description	ARCUSTMN: 13 Credit Limit
3. RM Data: File #	Field
Entry Options	
4. Type	N Numeric W/F Method Standard
5. Integers	9 Decimals Assumed? N 9
6. Entry "Look"	Overlay
7. Entry Position: Line	Column
8. Prompt	
9. Supplemental Lookup?	Y Auto Add Values? N Lookup Style S Key Field?
10. 'Add' Default:	L Last
11. Extract ID	

to change

OK Cancel

F4 Maintain Valid Values

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Web Menu Define Field Filters

Hidden Gems Modifying screens

The screenshot shows a web browser window titled 'SouthWare Excellence Series (DM) DEMO Company'. The main application window is 'Supplemental File Maintenance'. It contains three input fields: '*1. Filter Number' with value '4', '*2. Field Value' with value '0', and '3. Description'. A modal dialog titled 'ARCUSTMN: 13 Credit Limit' is open, displaying a table with the following data:

Value	Description
No Limit	
1000	New Customer
10000	Good Customer

The dialog also has a 'Field Value' and 'Description' header. At the bottom of the application window, there are fields for 'DEMO', '08/30/20', and '02'. A 'Web Menu' button is visible at the bottom left of the application area.

Hidden Gems Modifying screens

The screenshot displays the 'A/R Customer Maintenance' screen in SouthWare. The main form contains fields for customer information (Customer #, Name, Address, City, State, Zip Code, Contact, Phone, Salesperson, Balance Method) and financial data (Terms Code, Credit Limit, Avg Days to Pay, Current Balance, Past Due Amt, High Balance). A dialog box titled 'ARCUSTOMN-13 Credit Limit' is open, showing a table of credit limit options:

Value	Description
No Limit	
1000	New Customer
10000	Good Customer

The 'No Limit' option is currently selected. The main form also includes a '18.+Invoicing_' field with a 'Pricing' button and a value of '1'. At the bottom, a status bar shows 'available credit is calculated and a message given if credit is exceeded.', 'DEMO', '08/30/20', and '13'.

Hidden Gems

Modifying screens

XX-09-09 SouthWare Excellence Series (DM/) DEMO Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Screen Field O/R Maint

*1. Program ID	ARCUSTMN	
*2. Field ID	2302	AR01 35
*3. Override #	01	User Comment
4. Comment	Change title	
5. Override Label?	<input checked="" type="checkbox"/>	Assigned Reseller
6. Label Line		
7. Label Position		
8. Accept Special Handling	<input type="checkbox"/>	None
9. Data Line		
10. Data Position		
11. Data Field Size	0	
12. Data #Decimals	No override	
13. Data Override Font		
14. Data Attributes		
15. Extract ID		
16. Active Flag	<input checked="" type="checkbox"/>	

Current Field Format

Timestamp 08/30/20 11:11

Assigned Reseller

Ln: 3.0 Pos: 1.0

Alpha 20

Ln: 3.0 Pos: 13.0

to change

OK Cancel

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Web Menu Screen Overrides

Hidden Gems Modifying screens

AR-07-01 SouthWare Excellence Series (DM) DEMO Company
File Edit Approx Search Next Previous Enter Options Breakout Link Help

A/R Customer Maintenance

*1. Customer #	1
2. Name	Carl Sanders
3. Address 1	123 Magnolia Avenue
4. Address 2	
5. Address 3	
6. City, State	Auburn AL
7. Zip Code	36830 Int? N
8. Contact	Carl Sanders
9 +Phone/Other	334-821-2342
10. Salesperson	BTR Blake Robbins
11. Balance Method	Open Item Statement Monthly

12. Terms Code	2	2/10 Net 30
13. Credit Limit		Rating
14. Avg Days to Pay	26	Add Late Fee? Y
15. Current Balance	8,807.59	As of 11/27/
16. Past Due Amt	8,833.79	As of 10/25/
17. High Balance	12,093.75	

18.+Invoicing	
Pricing	1
Disc %	
Req PO#?	N
Ship Via	P Customer Pickup
Tax Code	1
Ship To	
Bill To	

19.+Type	
20. Group #	P
21. Tax #	

23. User Fields	
Search Enter Help Exit	
User Flags	
Assigned Reseller	
Exit	

Web Menu Customer Maintenance

DEMO 08/30/20 2301

Hidden Gems Action Scheduler

- Using Pre-recorded answers (RCF Packets), the Action Scheduler can run these recordings automatically on a schedule.
- Ideal for Automating reports after hours and closing End of Day without user input.

Hidden Gems

REMEMBER

- Always ask your partner:
 - I Wonder if ...
 - I wish it could ...

Thank you for your time.



Coming Up Next...

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Hidden Gems

- Posting Register Portal
- PDF Landscape Printer
- Retain Window's Printer Settings on Your SouthWare Printer
- Purge Inactive Operators and Workstations
- Buttons, Buttons and More Buttons

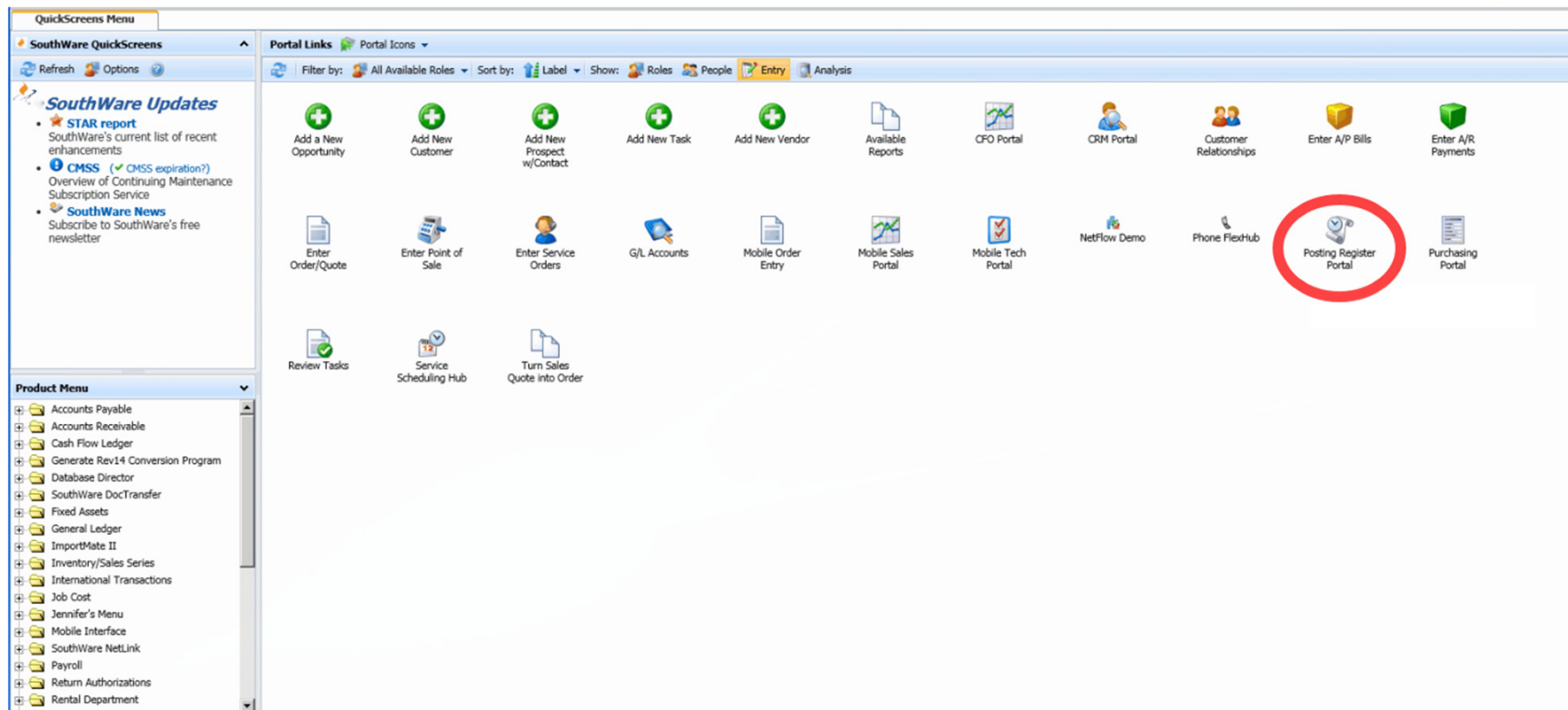
Hidden Gems

Posting Register Portal

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Posting Register Portal



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
















Posting Register Portal

QuickScreens Menu Posting Register Portal								
Overview	Register Setup	APGL Log	OEEOD Log	ARGL Log	JCGL Log	PRGL Log	GLTRX Log	
Registers	ID	Auto-Output	O/R ID	Separate File	Active?	Auto-Post to G/L?	Auto-Post in G/L?	
Accounts Payable								
A/P Payments	APPAY							Set Up
A/P Transactions	APTRX							Set Up
A/P G/L Interface	APGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
A/R, I/S, SV								
A/R Cash Receipts	ARCSH							Set Up
A/R Transactions	ARTRX							Set Up
Sales End of Day	OEEOD	Spool		Per Day	✓			Edit
Svc Mgt End of Day	SVEOD							Set Up
Receivings Transactions	INVRE							Set Up
Receivings Cost Transactions	INVRC							Set Up
Inventory Transactions	INVTR							Set Up
Physical Count Transactions	INVPH							Set Up
A/R G/L Interface	ARGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Job Cost								
Job Cost Transactions	JCTRX							Set Up
Job Cost G/L Interface	JCGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Payroll								
Payroll Check Processing	PRCHK							Set Up
Payroll G/L Interface	PRGL	Spool		Per Month	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
General Ledger								
G/L Journal Transactions	GLTRX	Spool		Per Day	✓			Edit

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Posting Register Portal

QuickScreens Menu Posting Register Portal x								
Overview Register Setup APGL Log OEEOD Log ARGL Log JCGL Log PRGL Log GLTRX Log								
Registers	ID	Auto-Output	O/R ID	Separate File	Active?	Auto-Post to G/L?	Auto-Post in G/L?	
Accounts Payable								
A/P Payments	APPAY							 Set Up
A/P Transactions	APTRX							 Set Up
A/P G/L Interface	APGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Edit
A/R, I/S, SV								
A/R Cash Receipts	ARCSH							 Set Up
A/R Transactions	ARTRX							 Set Up
Sales End of Day	OEEOD	Spool		Per Day	✓			 Edit
Svc Mgt End of Day	SVEOD							 Set Up
Receivings Transactions	INVRE							 Set Up
Receivings Cost Transactions	INVRG							 Set Up
Inventory Transactions	INVTR							 Set Up
Physical Count Transactions	INVPH							 Set Up
A/R G/L Interface	ARGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Edit
Job Cost								
Job Cost Transactions	JCTRX							 Set Up
Job Cost G/L Interface	JCGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Edit
Payroll								
Payroll Check Processing	PRCHK							 Set Up
Payroll G/L Interface	PRGL	Spool		Per Month	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	 Edit
General Ledger								
G/L Journal Transactions	GLTRX	Spool		Per Day	✓			 Edit

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Posting Register Portal

QuickScreens Menu Posting Register Portal								
Overview	Register Setup	APGL Log	OEEOD Log	ARGL Log	JCGL Log	PRGL Log	GLTRX Log	
Registers	ID	Auto-Output	O/R ID	Separate File	Active?	Auto-Post to G/L?	Auto-Post in G/L?	
Accounts Payable								
A/P Payments	APPAY							Set Up
A/P Transactions	APTRX							Set Up
A/P G/L Interface	APGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
A/R, I/S, SV								
A/R Cash Receipts	ARCSH							Set Up
A/R Transactions	ARTRX							Set Up
Sales End of Day	OEEOD	Spool		Per Day	✓			Edit
Svc Mgt End of Day	SVEOD							Set Up
Receivings Transactions	INVRE							Set Up
Receivings Cost Transactions	INVRC							Set Up
Inventory Transactions	INVTR							Set Up
Physical Count Transactions	INVPH							Set Up
A/R G/L Interface	ARGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Job Cost								
Job Cost Transactions	JCTRX							Set Up
Job Cost G/L Interface	JCGL	Spool		Per Day	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
Payroll								
Payroll Check Processing	PRCHK							Set Up
Payroll G/L Interface	PRGL	Spool		Per Month	✓	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit
General Ledger								
G/L Journal Transactions	GLTRX	Spool		Per Day	✓			Edit

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Posting Register Portal

QuickScreens Menu **Posting Register Portal**

Overview Register Setup APGL Log OEEOD

Register Files for APTRX Record

You may choose to output a separate file per posting or to combine registers per day or month.

Output a Separate File:

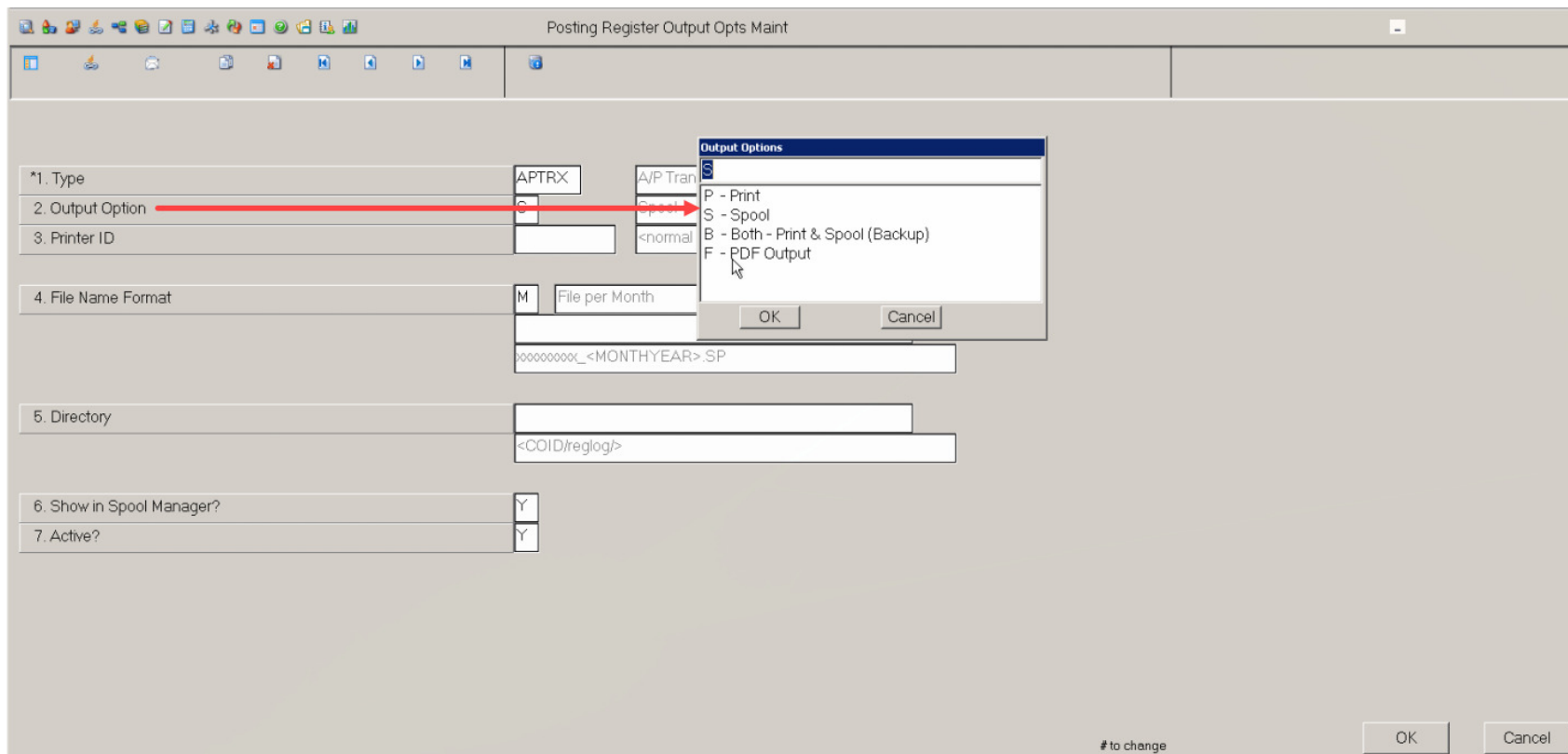
- Per Posting
- Per Posting
- Per Day
- Per Month
- User-Defined

Registers	Auto-Output	O/R ID	Separate File	Active?	Auto-Post to G/L?	Auto-Post in G/L?	
Accounts Payable							
A/P Payments							+ Set Up
A/P Transactions							+ Set Up
A/P G/L Interface							Edit
A/R, I/S, SV							
A/R Cash Receipts		ARCSH					+ Set Up
A/R Transactions		ARTRX					+ Set Up
Sales End of Day	Spool	OEEOD	Per Day	✓			Edit
Svc Mgt End of Day		SVEOD					+ Set Up
Receivings Transactions		INVRE					+ Set Up
Receivings Cost Transactions		INVRC					+ Set Up
Inventory Transactions		INVTR					+ Set Up
Physical Count Transactions		INWPH					+ Set Up
A/R G/L Interface	Spool	ARGL	Per Day	✓	☑	☑	Edit
Job Cost							
Job Cost Transactions		JCTRX					+ Set Up
Job Cost G/L Interface	Spool	JCGL	Per Day	✓	☑	☑	Edit
Payroll							
Payroll Check Processing		PRCHK					+ Set Up
Payroll G/L Interface	Spool	PRGL	Per Month	✓	☑	☑	Edit
General Ledger							
G/L Journal Transactions	Spool	GLTRX	Per Day	✓			Edit

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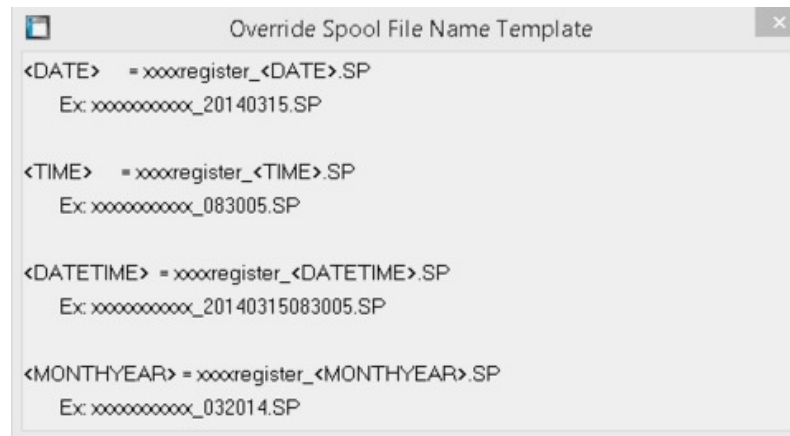
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Posting Register Portal



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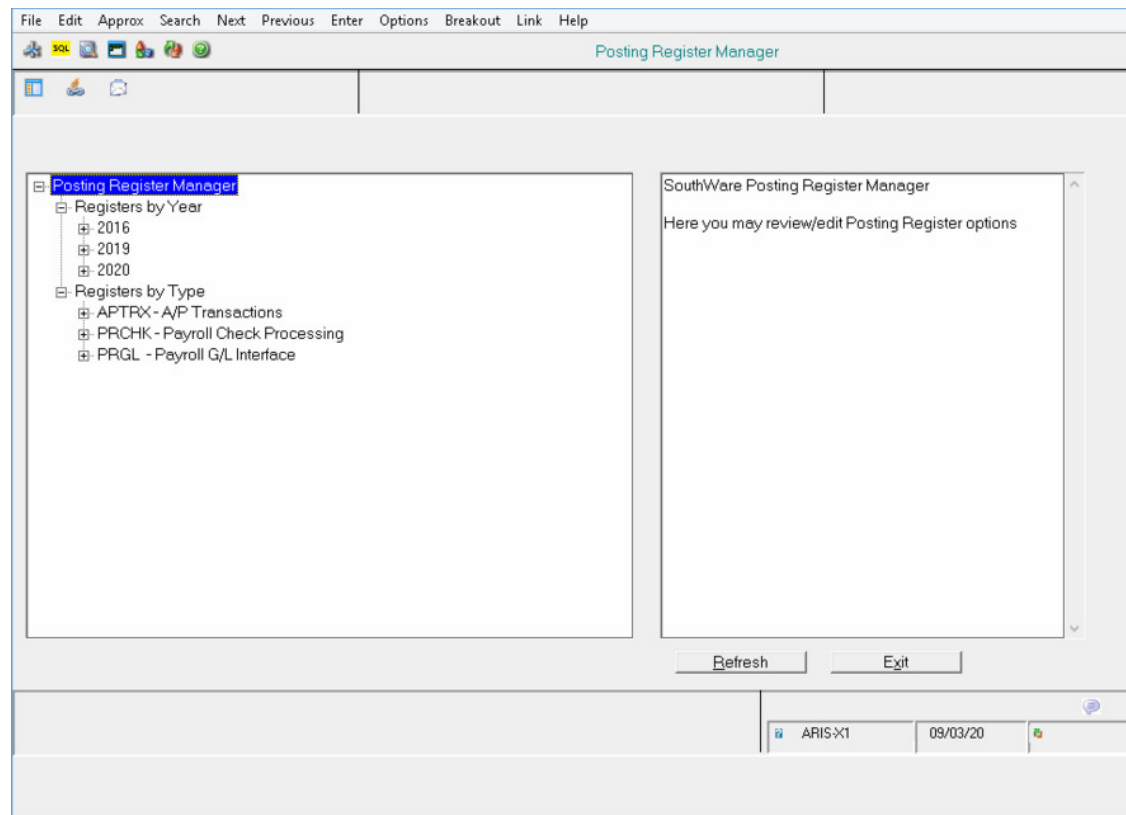
Posting Register Portal



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Posting Register Portal



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Posting Register Portal

The screenshot displays the 'Posting Register Portal' interface. At the top, there is a navigation bar with tabs for 'QuickScreens Menu', 'Posting Register Portal', and various logs including 'APTRX Log', 'APGL Log', 'OEEOD Log', 'ARGL Log', 'JCLG Log', 'PRGL Log', and 'GLTRX Log'. Below this is a sub-menu with 'Overview', 'Register Setup', and 'APTRX Log' selected.

The main area is titled 'A/P Transactions' and contains a table with the following data:

Date	Time	Output Desc	Operator	Last Append	OK?
06/24/14	9200257	Spool	JENTHIN	06/24/14	Y

Below the table, it indicates 'Total Records: 1'. To the right of the table is a details pane for the selected transaction:

- Type: APTRX
- Name: Transaction Posting Report
- Date/Time: 06/24/14 9200257
- Output Type: S - Spool
- Full File Name: /usr5/dev15/run/JW/reglog/ap/APTRRJEN_062014.SP
- Last Append: 06/24/14 9250274
- Operator: JENTHIN
- Batch ID: JENTHIN APTRX2014062409200257
- Completed OK?: Y
- Error Comment:

Below the details pane are two buttons: 'Print/Output' and 'View as PDF'. At the bottom of the details pane is a 'Delete File' link with a red 'X' icon.

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Hidden Gems

Posting Register Portal

The screenshot displays the 'Posting Register Portal' interface. The 'Overview' tab is highlighted with a red circle. The interface is divided into three main sections: 'Register Setup', a table of registers, and a detailed view of 'A/P Transactions'.

Register Setup

The posting registers produced by each SouthWare posting process provide an audit trail of the updated data. In this portal you may choose to activate logging of registers and to automate several features of the posting:

- Auto-Output** - Defining an Auto-Output for a posting register enables the creation or updating of a log record for each posting that uses that register. Specify which output format (and optionally which printer ID) to automatically use.
 - You may choose to create a spool file, a printout, a PDF file, or output both a printout and a spool file.
- Separate File** setting - Indicate whether to create a separate file per posting, per day, or per month (if spooling). This lets you optionally combine related postings into a single file to make it easier to search for data.
- Active** - After defining logging for a post register type you have the option to activate/deactivate the logging if needed.
- Auto-Post to G/L** - For each G/L interface process you may specify whether to automatically post G/L distributions to G/L transactions as part of the posting process. This will create a G/L transaction per posting.
 - Auto-Post in G/L** - If you automatically post to G/L you may specify whether to automatically post the G/L transactions created from posting. This will automatically post interfaced transactions to the permanent ledger so they are instantly reflected in G/L data.
- Edit or Set Up buttons** - The button to the right of each posting register line accesses the maintenance program you can use to access the options for the register. The Set Up button automatically creates the record, then lets you review/edit it as needed.

Log Report Tabs

For each register type that is logged you may click on the related tab to view a list of the logging records. When you highlight a record you may see the logged information as well as use the button options to print/output the file or view the file as a PDF document (which automatically provides the ability to search the text of the report).

Tree Manager

There is a tree manager that shows all logged registers.

[Click here to access the posting register manager](#)

Registers	ID	Auto-Output	O/R ID	Separate File	Active?	Auto-Post to G/L?	Auto-Post in G/L?	
Accounts Payable								
A/P Payments	APPAY	Spool		Per Month	●			Edit
A/P Transactions	APTRX	Spool		Per Posting	✓			Edit
A/P G/L Interface	APGL					<input type="checkbox"/>	<input type="checkbox"/>	Set Up
A/R, I/S, SV								
A/R Cash Receipts	ARCSH	Spool		Per Day	✓			Edit
A/R Transactions	ARTRX							Set Up
Sales End of Day	OEEOD	Spool		Per Day	✓			Edit
Svc Mgt End of Day	SVEOD	Spool		Per Day	✓			Edit
Receivings Transactions	INVRE	Spool	BHSPool	Per Posting	✓			Edit
Receivings Cost Transactions	INVRC							Set Up
Inventory Transactions	INVTR							Set Up
Physical Count Transactions	INVPH							Set Up
A/R G/L Interface	ARGL					<input type="checkbox"/>	<input type="checkbox"/>	Set Up
Job Cost								
Job Cost Transactions	JCTRX	Print/Spool		Per Posting	✓			Edit

A/P Transactions

Refresh | Last 30 Days | Listing | Purge

Type	Name	Date/Time
APTRX	Transaction Posting Report	05/22/14 16360956

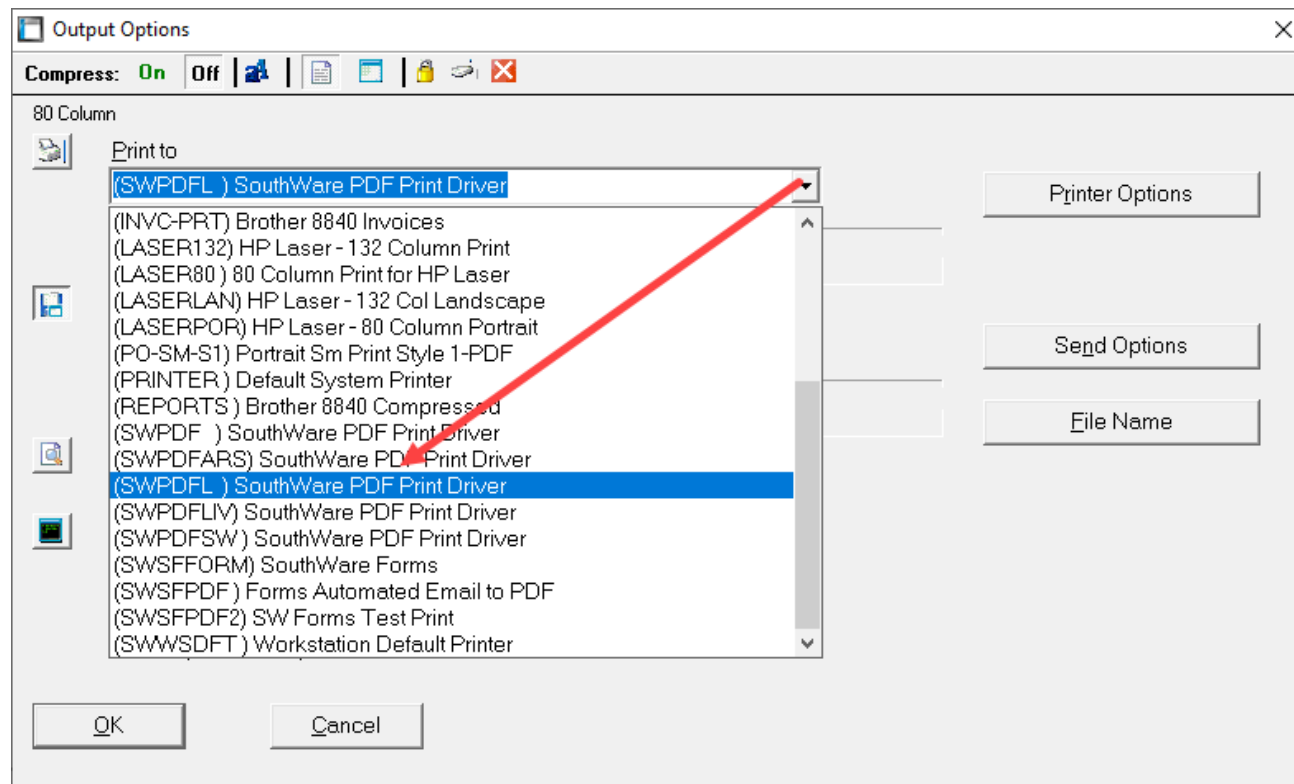
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PDF Landscape Printer

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PDF Landscape Printer



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PDF Landscape Printer

Demo Company CUSTOMER LISTING Date-09/02/20 Ref# AR-05-06-01
Time- 9:39:01 Page 1

For Customers: ALL

CUST #	NAME	CONTACT	BALANCE METHOD	TERMS	DISCOUNT%	COST PTD	SALES PTD
GROUP#	ADDRESS 1	PHONE #	STATEMENT FREQ	FIN CHARGE	PRICE LEVEL	COST YTD	SALES YTD
Inactive	ADDRESS 2	SALESPERS	SHIP VIA	TAX CODE	SALES LST YR	ACCOUNT BAL	HIGHEST BAL
DT ADDED	ADDRESS 3	FAX #	BILL TO #	CUST TYPE	SALES TERR	DATE AGED	PAST DUE BAL
	CITY	CR RATING	SHIP TO #	LAST SALE	LAST PAYMNT		
	ST ZIP	CR LIMIT					
1	Carl Sanders 123 Magnolia Avenue Auburn AL 36830	Carl Sanders 334-821-2342 BTR BTR 334-821-2344	OPEN ITEM MONTHLY Customer Pickup	2/10 Net 30 Y 1		2,500.00	8,807.59
09/24/17					Alabama	04/19/19	12,093.75
	COUNTRY: INT? N	E-MAIL: CARL@SANDERS.COM					8,833.79
2	Manfred Morris 987 Dogwood Lane Opelika AL 36801	Manfred Morris 205-749-5741 BTR BTR 334-821-1154	OPEN ITEM MONTHLY Customer Pickup	2/10 Net 30 Y 1		4,215.00	2,720.00
09/24/17					Alabama	04/19/19	2,720.00
	COUNTRY: INT? N	E-MAIL: manfred@morris.com					2,720.00
3	Ryan Chance 4647 Sports Blvd Charlotte MI 45333	Ryan Chance 313-234-2983 BTR BTR 313-234-9872	OPEN ITEM MONTHLY C. Groundtrac	2/10 Net 30 Y NT			2,662.24
09/24/17					Alabama	08/21/17	04/19/19
	COUNTRY: INT? N	E-MAIL: RYAN@CHANCE.COM					2,662.24
4	Betty Hines 7243 Cotton Street Highland AL 89778	Betty Hines 205-776-2342 BTR BTR	OPEN ITEM MONTHLY Customer Pickup	2/10 Net 30 Y 1			752.50
09/24/17					Alabama	10/24/17	04/19/19
	COUNTRY: INT? N	E-MAIL: betty@hines.com					1,290.00
							752.50
6	Rose O'Brien 2136 Elk Street Macon GA 75464	Rose O'Brien 404-563-2278 BTR BTR	OPEN ITEM MONTHLY UPS-Ground/Comm	2/10 Net 30 Y 2			4,123.87
09/24/17					Alabama	11/25/17	04/19/19
	COUNTRY: INT? N	E-MAIL: rose@rose.com					4,123.87
							4,123.87

SPA2020 Southware User Conference

Hidden Gems

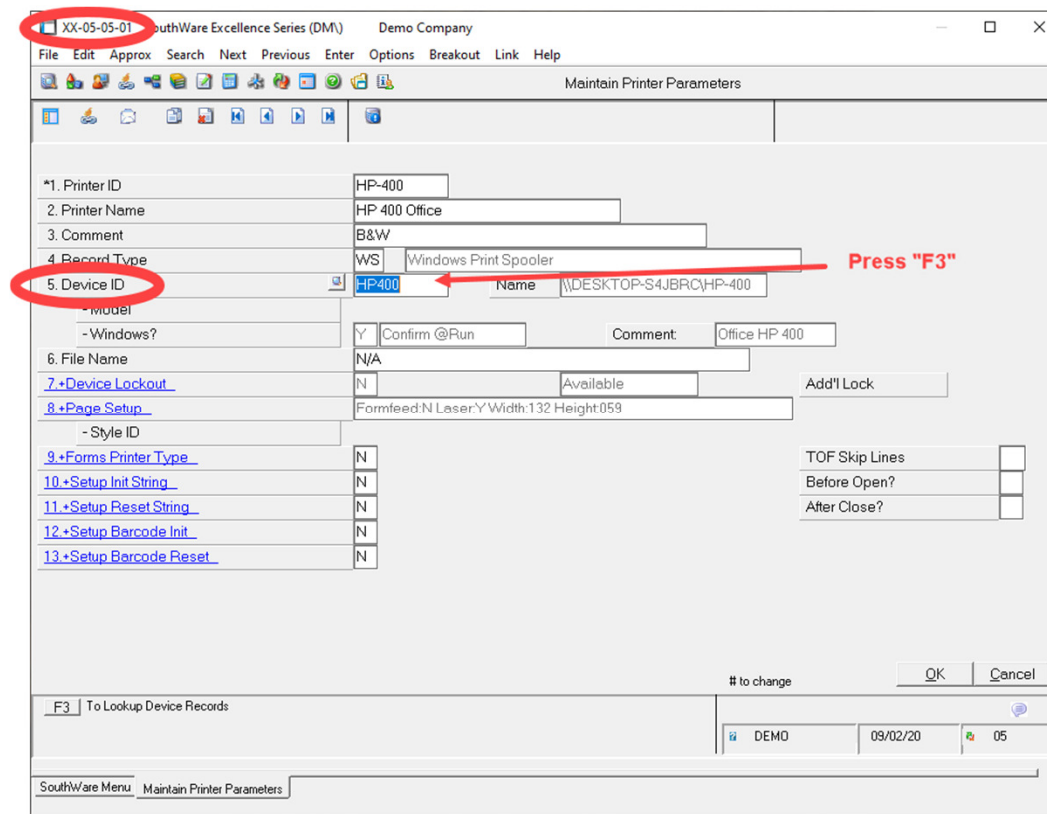
Retain Windows Printer Settings on Your SouthWare Printer

SPA2020 Southware User Conference

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer

XX-05-05-01



SPA2020 Southware User Conference

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer

The screenshot shows the 'Maintain Printer Parameters' window in SouthWare Excellence Series (DMV). The window title is 'XX-05-05-01 SouthWare Excellence Series (DMV) Demo Company'. The menu bar includes 'File', 'Edit', 'Approx', 'Search', 'Next', 'Previous', 'Enter', 'Options', 'Breakout', 'Link', and 'Help'. The toolbar contains various icons for file operations and navigation.

The main form contains the following fields:

- *1. Printer ID: HP-400
- 2. Printer Name: HP 400 Office
- 3. Comment: B&W
- 4. Record Type: WS Windows Print Spooler
- 5. Device ID: HP400 Name: \\DESKTOP-S4JBRC\HP-400
- Model
- Windows? Y Cor
- 6. File Name: N/A
- 7. +Device Lockout: N
- 8. +Page Setup: Formset
- Style ID
- 9. +Forms Printer Type: N
- 10. +Setup Init String: N
- 11. +Setup Reset String: N
- 12. +Setup Barcode Init: N
- 13. +Setup Barcode Reset: N

A 'SwiftMate Search' window is overlaid on the main form, displaying a table of printer devices:

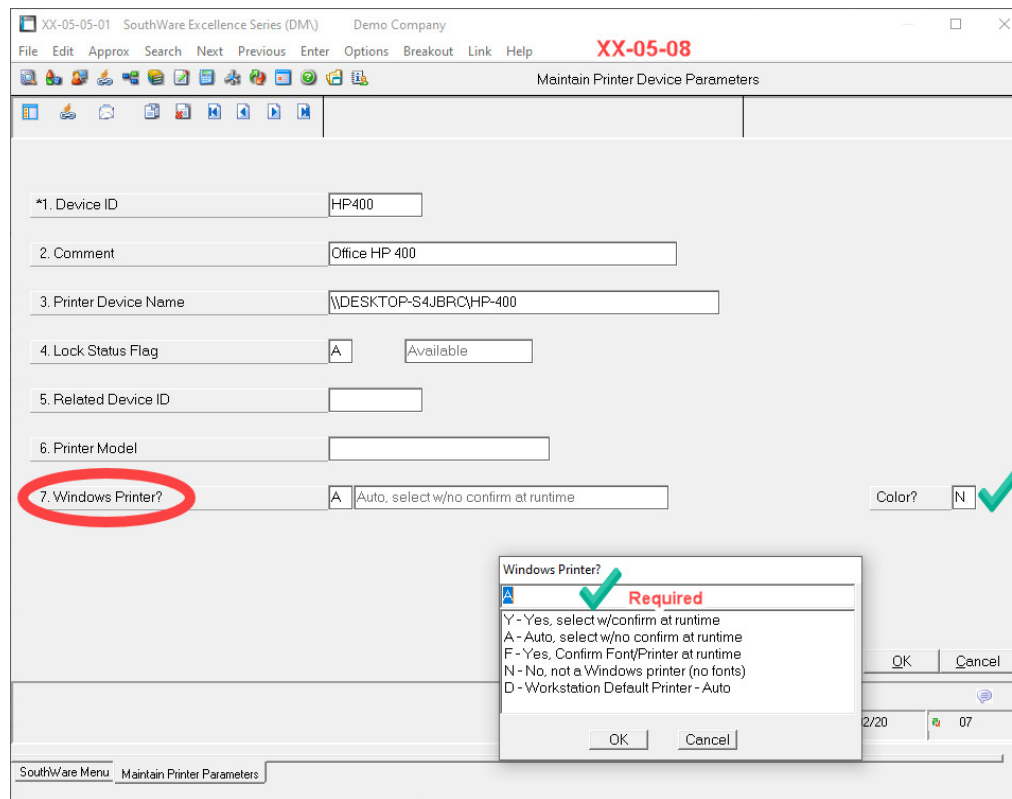
Device ID	Comment	Model	Name
HP400	Office HP 400		\\DESKTOP-S4JBRC\HP-400
LOCAL	Standard Local Printer		LOCALPRINT
PDFBRO	Brother PDF Writer		SWPDF
PRINTER	Auto Default DEVICE Record	DEFAULT PRINTER	
SWPDF	SouthWare PDF DEVICE: CHANGE NO	SWPDF	
SWPDFL	SouthWare PDF DEVICE: CHANGE NO	SWPDF	
SWSFFORM	SouthWare SF Forms Printer	SWPDF	
SWWSDFT	Workstation Default Printer	PRINTER	

Below the table, the text reads: 'SouthWare Printer Devices (Links SouthWare Printer to Windows Printer)'. At the bottom of the search window, it says 'Press "F3" Again'.

At the bottom of the main window, there is a footer: 'SouthWare Menu Maintain Printer Parameters'.

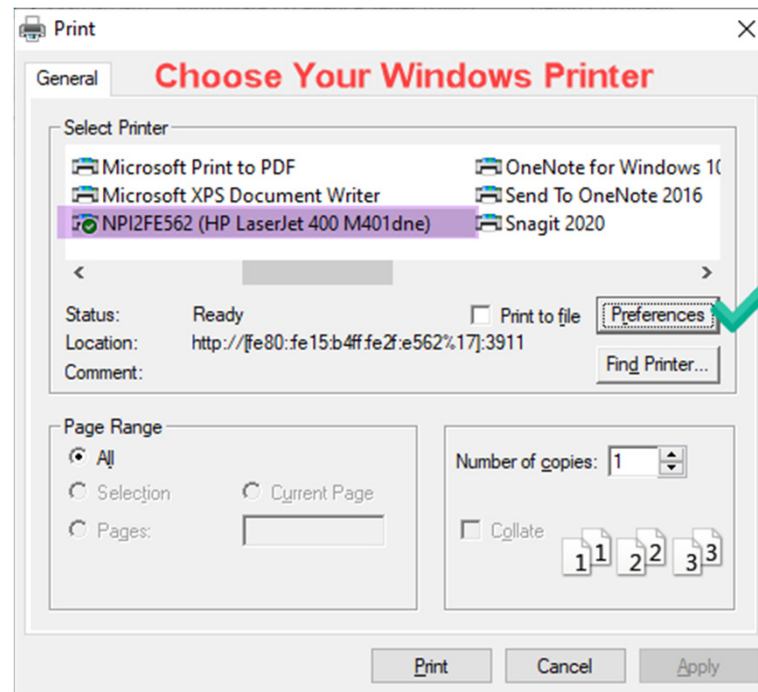
Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer



Hidden Gems

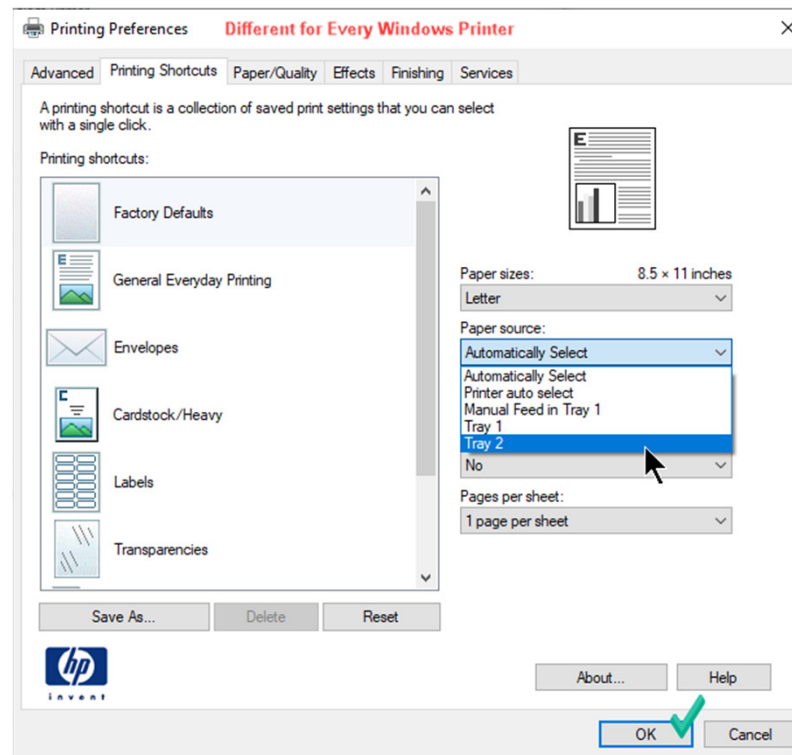
Retain Window's Printer Settings on Your SouthWare Printer



SPA2020 Southware User Conference

Hidden Gems

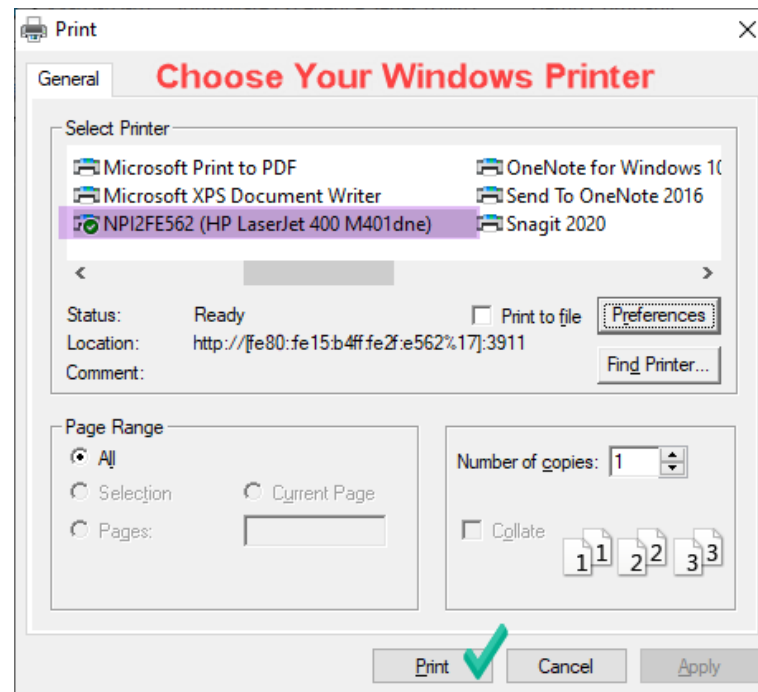
Retain Window's Printer Settings on Your SouthWare Printer



SPA2020 Southware User Conference

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer



SPA2020 Southware User Conference

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer

Device Name: NP12FE562 (HP LaserJet 400 M401dne)

Search Enter Help Exit

Printer Defaults	Overrides
Orientation: Portrait	Orientation: No Ovr (printer default)
# Copies: 1	# Copies: 2
Duplex: Simplex	
Tray: User defined	

Exit

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer

The screenshot shows a window titled "SouthWare Excellence Series (DM) Demo Company" with a menu bar (File, Edit, Approx, Search, Next, Previous, Enter, Options, Breakout, Link, Help) and a toolbar. The main area is titled "Maintain Printer Device Parameters" and contains the following fields:

- *1. Device ID: HP-4001S
- 2. Comment: HP-400 1 Sided
- 3. Printer Device Name: \\DESKTOP-S4JBRC\HP-400
- 4. Lock Status Flag: A Available
- 5. Related Device ID: (empty)
- 6. Printer Model: (empty)
- 7. Windows Printer?: A Auto, select w/no confirm at runtime

At the bottom right, there is a "Color?" field with "N" selected. Below the fields is a "# to change" field with a minus sign, and "OK" and "Cancel" buttons. A green checkmark is visible over the "OK" button. The status bar at the bottom shows "SouthWare Menu Maintain Printer Parameters", "DEMO", "09/02/20", and "92".

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer

XX-05-05-01 SouthWare Excellence Series (DM) Demo Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Maintain Printer Device Parameters

*1. Device ID

2. Comment


3. Printer Device Name

4. Lock Status Flag

5. Related Device ID

6. Printer Model

7. Windows Printer? Color?

Exit 

* F3 to Lookup

DEMO 09/02/20 01

SouthWare Menu Maintain Printer Parameters

SPA2020 Southware User Conference

Hidden Gems

Retain Window's Printer Settings on Your SouthWare Printer

XX-05-05-01 SouthWare Excellence Series (DMV) Demo Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Maintain Printer Parameters

*1. Printer ID	HP-400
2. Printer Name	HP 400 Office
3. Comment	B&W
4. Record Type	WS Windows Print Spooler
5. Device ID	HP-4001S Name \\DESKTOP-S4JBRG\HP-400
- Model	
- Windows?	<input checked="" type="checkbox"/> Auto Select Comment HP-400 1 Sided
6. File Name	N/A
7.+Device Lockout	<input type="checkbox"/> Available <input type="button" value="Add! Lock"/>
8.+Page Setup	Formfeed:N Laser:Y Width:132 Height:059
- Style ID	
9.+Forms Printer Type	<input type="checkbox"/> TOFSkip Lines
10.+Setup Init String	<input type="checkbox"/> Before Open?
11.+Setup Reset String	<input type="checkbox"/> After Close?
12.+Setup Barcode Init	
13.+Setup Barcode Reset	

to change

F4 | Printer Group

DEMO 09/02/20 92

SouthWare Menu Maintain Printer Parameters

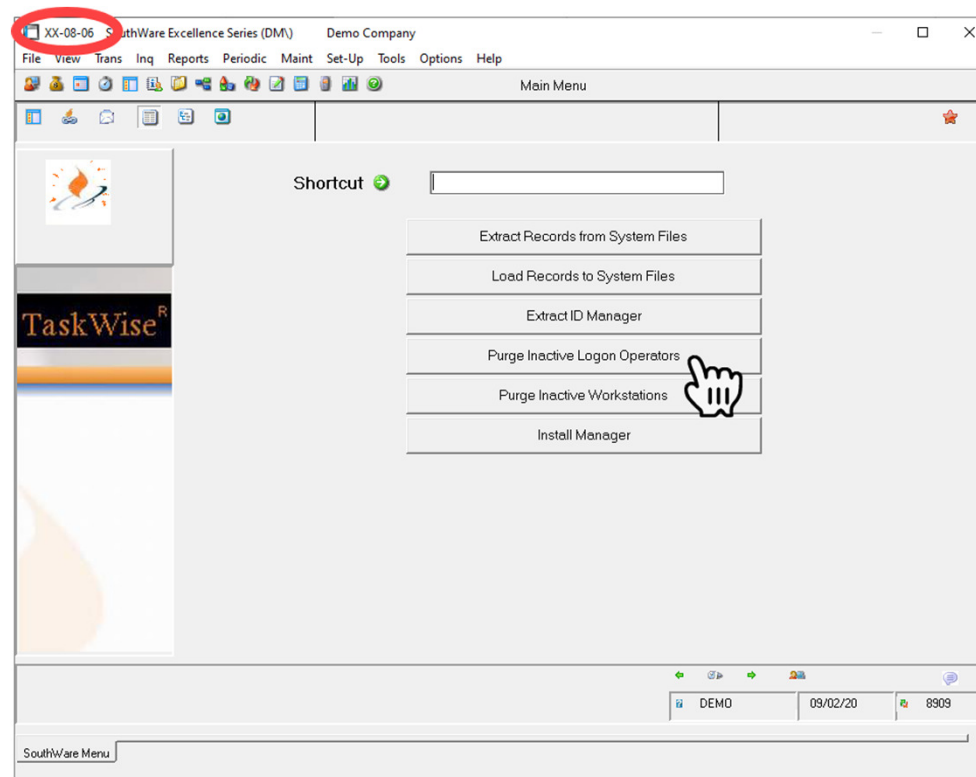
Hidden Gems

Purge Inactive operators and Worstations

SPA2020 Southware User Conference

Hidden Gems

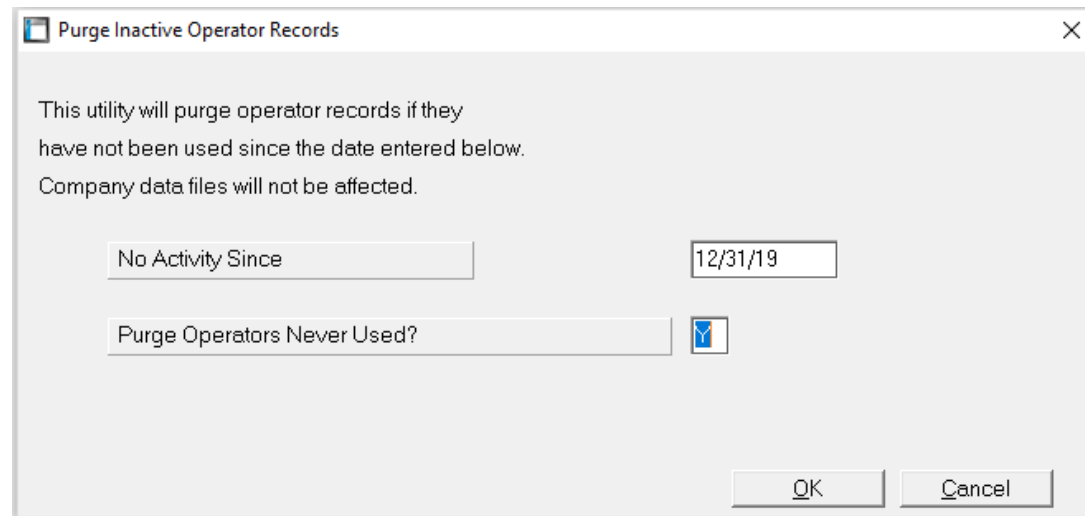
Purge Inactive Operators and Workstations



SPA2020 Southware User Conference

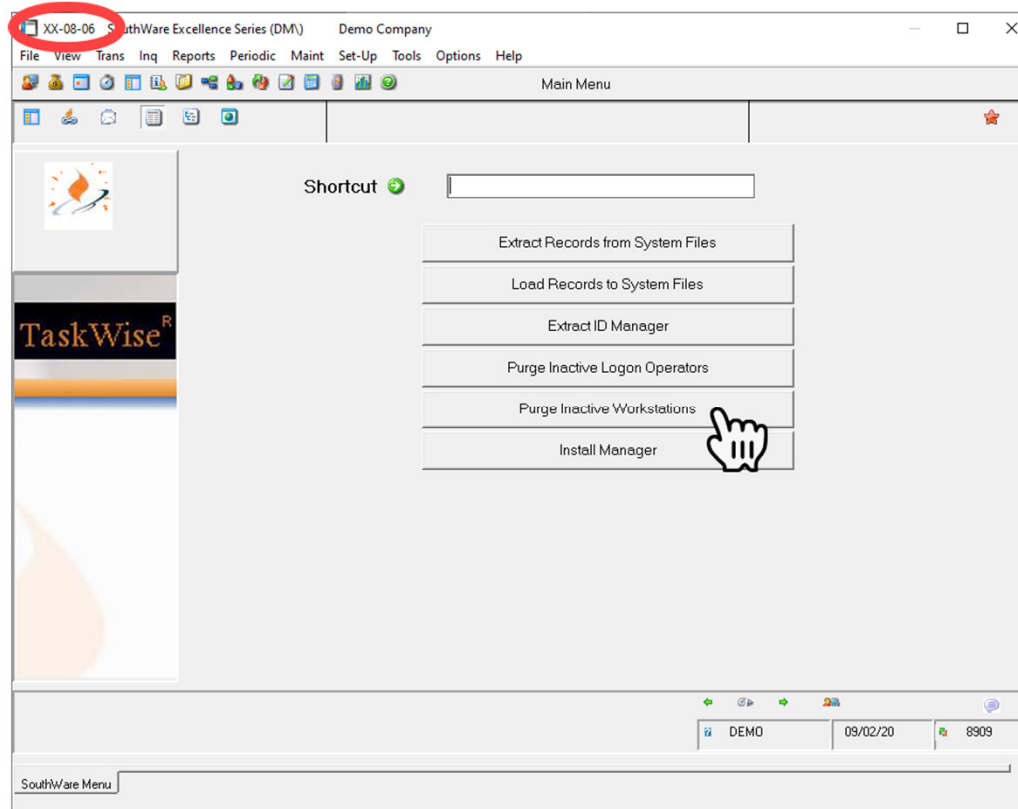
Hidden Gems

Purge Inactive Operators and Workstations



Hidden Gems

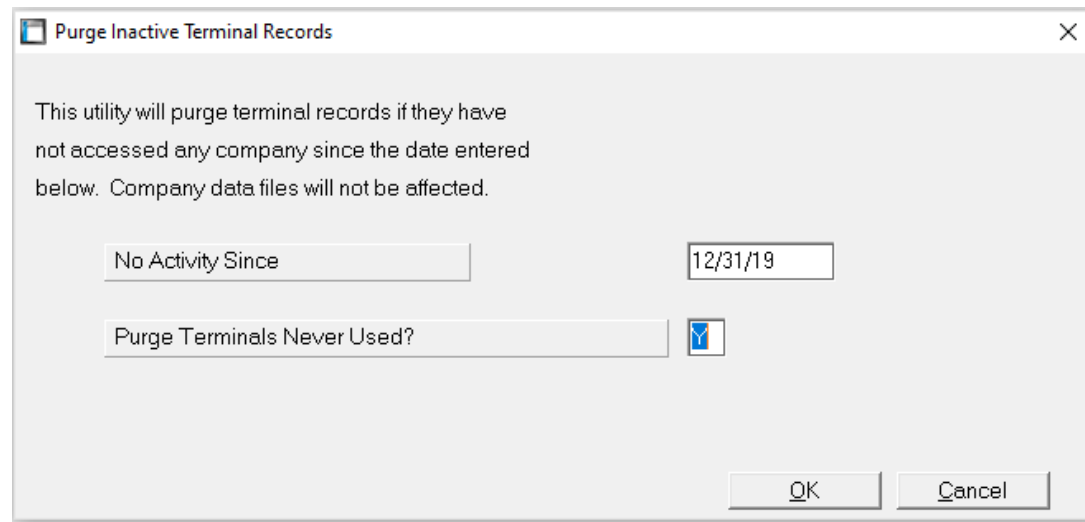
Purge Inactive Operators and Workstations



SPA2020 Southware User Conference

Hidden Gems

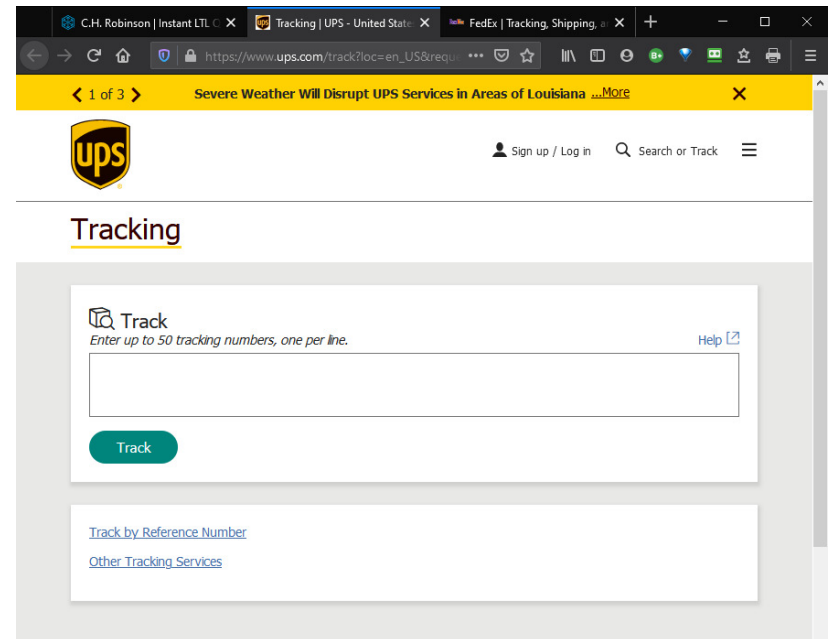
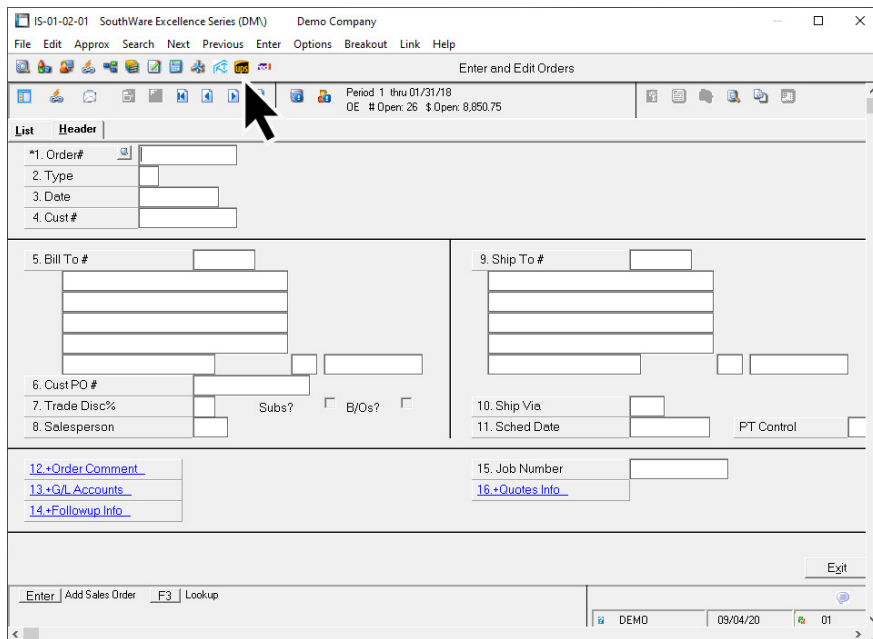
Purge Inactive Operators and Workstations



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Hidden Gems

Buttons, Buttons and More Buttons



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Be a Southware Genius

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HIDDEN “GEMS”

- The “Most Recent” Keys in the main searches
- Reprint or Void an Invoice after printing
- Auto Customer Refund in AP
- Pay Advanced Deposits in AP
- ACH & CC Payments in AP
- Hold & Copy Feature in GL0101
- Enter & Post Budgets in GL
- Financial Viewer in GL

The “Most Recent” Keys

- AR04 – Most Recent Invoices and Most Recent Activity
- AP0301 – Most Recent Documents
- IS0401 – “F3” Ledger search – F4 to reverse Date Sequence

Reprint or Void an Invoice

- Reprint or Void an Invoice before posting
- Check operator record for flag – IS0711 #18 Void Invoice prior to EOD
- This option allows you to reprint, void or delete an invoice

Auto Customer Refund in AP

- Enter an AP prepaid transaction that will create a refund check for a customer and update the customers account.
- Create a prepaid transaction to a MISC vendor and key the customers name and address
- On the distribution screen use the C type for customer refund
- Enter customer number, offset account and amount
- Print the check

Pay Advanced Deposits in AP

- Enter a Prepaid transaction in AP0101
- Press F4 at the document number field
- Print the check and post the transaction
- This creates an open item credit in the vendor's account that will automatically be applied during the next check run
- You can also apply a PO number to have the system “wait” until another invoice is added for that PO.

ACH & CC payments in AP

- In AP0606 you can set up alternate pay types.
- One good use for this is an ACH or Wire Transfer type. This allows you to enter an ACH or Wire without making up a check number or range of check numbers. When these are set up each payment method (Prepaid, Manual and Check Run) asks for pay code and you can enter this type.
- Another good use is to set up to pay with credit cards. This method allows you to pay your invoices with a credit card type. The result is the invoice shows that it was paid with a CC in the regular vendor's account and shows the paid invoice in the credit card vendors account to match to the statement when it comes in.

Hold & Copy Features in GL0101

- Function keys at the bottom of the screen
- F5 is the copy transaction
- F6 is the hold feature

Enter and Post Budgets

- GL0801 field #3 has to be on for budgets
- GL0701 - each account has a place for 3 budgets – current, original and pending
- GL0702 – allows you to create a workfile, enter budgets and post the budgets
- The financial statements allow the budgets to be used with every structure

GL Financial Statement Viewer

- GL0307



Coming Up Next...

SPA2020 Southware User Conference

Hidden Gems

- PO Planner
- PO Approval
- Mobile Order Entry
- Point of Sale / Counter Sales
- Pricing Review
- Mobile Sales

Hidden Gems

PO Planner Portal

The screenshot displays the SouthWare PO Planner Portal interface. The main window shows a list of items with columns for Item #, Loc, Sugg Qty, Sugg U/M, Order Qty, U/M, Purch Desc, Qty for Stock, and Total Item Qty. The 'Qty for Stock' column is highlighted in yellow. A detailed view for item 225L-BLUE-M is shown on the right, including item details, location, category, primary vendor, last cost, and quantities (On Hand, Committed, On BO, Available, On POs, Suggested, In Workfile).

Item #	Loc	Sugg Qty	Sugg U/M	Order Qty	U/M	Purch Desc	Qty for Stock	Total Item Qty	D
225L-BLUE-M	001	4,500	EA	4,500	EA	Loc: 001	4,500	4,500	Lak
225L-BLUE-S	001	4,500	EA	4,500	EA	Loc: 001	4,500	4,500	Lak
225L-HNTR-XL	001	.000	EA	4,500	EA	Loc: 001	4,500	4,500	Lak
225L-RED-L	001	4,500	EA	4,500	EA	Loc: 001	4,500	4,500	Lak
225L-RED-M	001	4,500	EA	4,500	EA	Loc: 001	4,500	4,500	Lak
225M-BLK-L	001	.000	EA	4,500	EA	Loc: 001	4,500	4,500	Me
225M-RED-S	001	.000	EA	4,500	EA	Loc: 001	4,500	4,500	Me
448M-RED-L	001	.000	EA	4,500	EA	Loc: 001	4,500	4,500	Me
448M-RED-XL	001	.000	EA	4,500	EA	Loc: 001	4,500	4,500	Me
448M-STN-3X	001	.000	EA	4,500	EA	Loc: 001	4,500	4,500	Me
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 10	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 20	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 30	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 40	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 50	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 60	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 70	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 80	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 90	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 100	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 110	.000	24000.000	Pip
PIP	001	.000	EA	2000.000	EA	Sales Order: 143 120	.000	24000.000	Pip

Item 225L-BLUE-M (more...)

Item: 225L-BLUE-M
Ladies' Interlock Sport Shirt
8oz 100% Cotton
BLUE/M

Location: 001
Category: AP
Primary Vendor: 50
First Stop Print Shop
Last Cost: \$10.95

Quantities:
On Hand: 9,000 EA
Committed: 2,000 EA
On BO: 51,000 EA
Available: 7,000 EA
On POs: 4,500 EA
Suggested: 4,500 EA
In Workfile: 4,500 EA

Hidden Gems

PO Approval Portal

The screenshot displays the SouthWare PO Approval Portal. The interface includes a navigation menu on the left with options like 'Pending POs', 'My Pending POs', 'All Buyers', 'By Buyer', 'Rejected POs', and 'My Rejected POs'. The main area shows a table of 'POs to Approve - Buyer PO' with columns for Yes/No, PO #, Amount, Vendor Name, Buyer, and Buy. The table lists several pending POs, with PO # 71 highlighted. A detailed view of PO # 71 is shown on the right, including fields for PO #, Date, Vendor, Terms, Ship Date, Ship To, Ship Via, Contact, Location, Type, Buyer, Comment, Print Date, Status (PENDING Approval), Total Cost, and Total Weight.

Yes	No	PO #	Amount	Vendor Name	Buyer	Buy
<input checked="" type="checkbox"/>	<input type="checkbox"/>	71	\$6,352.25	Halls Warehouse Supply	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	72	\$0.00	Halls Warehouse Supply	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	73	\$1,260.00	Halls Warehouse Supply	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	74	\$0.00	Office Supply Central	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	75	\$0.00	First Stop Print Shop	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	76	\$0.00	The Supplies Warehouse	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	77	\$0.00	Location 001 Vendor	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	78	\$9,990.30	Halls Warehouse Supply	PO	DEFA
<input checked="" type="checkbox"/>	<input type="checkbox"/>	79	\$49,275.00	Halls Warehouse Supply	PO	DEFA

PO # 71 Halls Warehouse Supply \$6,352.25

PO #: 71
Date: 04/23/19
Vendor: Halls Warehouse Supply (1)
Terms: N30
Ship Date: 00/00/00 (Last Recv'd: 00/00/00)
Ship To: Demo Company
5 Hinson Lane
Auburn, AL 36830
Ship Via:
Contact: Henrietta Gunn SUPPLIES@HALLS.COM
Location: 001
Type: R
Buyer: PO (DEFAULT PO BUYER)
Comment:
Print Date: 00/00/00
Status: 0 **PENDING Approval**
Total Cost: \$6,352.25 (Invoiced: \$.00)
Total Weight: 277.500

Hidden Gems

Mobile Order Entry Portal

SWWEBWIN SouthWare Excellence Series (DM) Demo Company

File View Trans Inq Reports Periodic Maint Set-Up Tools Options Help

SouthWare Web Menu

QuickScreens Menu IS - PO Planner Portal IS - PO Approval Portal IS - Mobile Order Entry

OE Refresh Options

New Order
Enter Cust #
Customer #:
1

Existing Order
Access Order #:
View Order

Customer Number	1
Name/Address	Carl Sanders 123 Magnolia Avenue Auburn AL 36830
Contact	Carl Sanders
Phone	334-821-2342
Salesperson	WTG

Start New Order

Create a Quote

Credit/Return

No Charge Sale

Pay on Acct

View Warning Notes

Date	Time	Purpose
10/15/10	935	Testing warning

Total Records: 1

Note Preview: Testing warning
Type:W Categ: By:DEMO Access:
Warning note for customer #1.

Options

- Summary
- View an Item
- List My Orders
- List My Quotes
- List Invoices
- Add Customer

More Options

Orders Hub

SouthWare Menu Processor Mode DEMO

Hidden Gems

Point of Sale / Counter Sales

SWWEBWIN SouthWare Excellence Series (DM) Demo Company

File View Trans Inq Reports Periodic Maint Set-Up Tools Options Help

SouthWare Web Menu

QuickScreens Menu IS - PO Planner Portal IS - PO Approval Portal IS - Mobile Order Entry IS - POS

Cust #:1 Order #:297 09/08/20 Salesperson: WTG-Wade Graham PO #:

Carl Sanders
123 Magnolia Avenue
Auburn AL 36830
Contact: Carl Sanders @ 334-821-2342
E-Mail: CARL@SANDERS.COM

Items (1) Subtotal	\$24.95
Taxes	\$1.25
Other Charges	\$0.00
Total Sale	\$26.20
Amount Paid	\$0.00
Balance Due	\$26.20

Checkout

Refresh Fast Mode (Qty 1) Hide Header

Item Qty Loc: 001 Add Item

Edit	Del	Item ID	Description	Qty	U/M	Unit Price	Total Price	Disc%	Line
		100	747 Swingline Desk Stapler	1.000	EA	24.950	\$24.95	0	10

Total Records: 1

Header Items Payment Charges

Main POS Alt POS Order Entry POS Config

Oper: POS Drawer: DEMO

Hidden Gems

Pricing Review Portal

The screenshot displays the SouthWare Pricing Review Portal interface. The window title is "SWWEBWIN SouthWare Excellence Series (DMN) Demo Company". The menu bar includes "File", "View", "Trans", "Inq", "Reports", "Periodic", "Maint", "Set-Up", "Tools", "Options", and "Help". The "SouthWare Web Menu" is visible, and the "IS - Pricing Review" window is active. The interface shows a "Price Overrides-Open Orders" section with a table of data. The table has columns for Order Dt, Order #, Line, Cust#, Cust Name, Item, O/R Price, U/M, O/R Type, and Qty. The data is filtered by dates from 00/00/1900 to 12/31/2099. The table contains 7 records. To the right of the table is a "Line Item Info" panel with tabs for "OE Portal" and "Std Line Entry". The "OE Portal" tab is selected, showing details for Order Number 24, Line Number 10, Order Date 03/01/19, Customer (# 1) Carl Sanders, Salesperson BTR, Operator POS, Date Added 05/04/98, Item ID 100, Qty Ordered 1.000 EA, Unit Price O/R \$25.00, O/R Type Oper, Extended Price \$25.00, Location 001, Product Category OS, Customer Type P, Vendor, and BOM/Kit ID.

Order Dt	Order #	Line	Cust#	Cust Name	Item	O/R Price	U/M	O/R Type	Qty
03/01/19	24	10	1	Carl Sanders	100	25.00	EA	Oper	
11/23/17	42	40	350	Columbus Auto Parts	400	1.33	ROL	Oper	
01/23/18	86	30	1150	Kleen Karpet	350T	100.00	EA	Oper	
01/25/18	109	20	1610	Patricia's Beauty Supplies	466	150.00	EA	Oper	
01/10/18	129	10	6	Rose O'Brien	350T	100.00	EA	Oper	
05/23/18	141	40	1	Carl Sanders	Main/SVC	275.000		Svc	
01/18/18	201	20	350	Columbus Auto Parts	Maint/Bill	500.000		Oper	

Line Item Info

OE Portal | Std Line Entry

Order Number: 24
Line Number: 10
Order Date: 03/01/19
Customer (# 1): Carl Sanders
Salesperson: BTR
Operator: POS
Date Added: 05/04/98
Item ID: 100
Qty Ordered: 1.000 EA
Unit Price O/R: **\$25.00**
O/R Type: **Oper**
Extended Price: \$25.00
Location: 001
Product Category: OS
Customer Type: P
Vendor:
BOM/Kit ID:

Hidden Gems

Mobile Sales Portal

The screenshot displays the SouthWare Mobile Sales Portal interface. At the top, there is a menu bar with options like File, View, Trans, Inq, Reports, Periodic, Maint, Set-Up, Tools, Options, and Help. Below this is a toolbar with various icons and a 'Launch' dropdown menu. The main window title is 'SouthWare Excellence Series (DM) Demo Company'. The interface shows a navigation pane on the left with options like Start, Accounts, Orders, Service, Tasks, Pipeline, and Analysis. The main content area displays 'Order #: 29 Cust# 1: Carl Sanders' with a total of \$430.00. Below this, there is a section for 'Order Lines' with a table containing one item: 'Panasonic Phone/Answering Sys' with a quantity of 2.000 and a price of 200.00. A right-hand sidebar contains 'Standard Options' such as General Info, Line Items, Misc Charges, Shipping Info, and Exit Order. The bottom of the screen shows a 'SouthWare Menu' and a 'Processor Mode' indicator.

Order #: 29 Cust# 1: Carl Sanders Total: \$430.00

EDIT	DEL	ITEM ID	DESCRIPTION	QTY	U/M	PRICE	TOTAL	B/O QTY
		105	Panasonic Phone/Answering Sys	2.000	EA	200.00	\$400.00	

Total Records: 1