



Be a Southware Genius

SPA2021
Southware User Conference

Welcome

Southware Partner Alliance 2021 User Conference

SPA2021
Southware User Conference

We are glad you are here!

- **4th Annual Conference**
- **First with Southware as part of Aptean**

Today's Host



Nolan Breazeale

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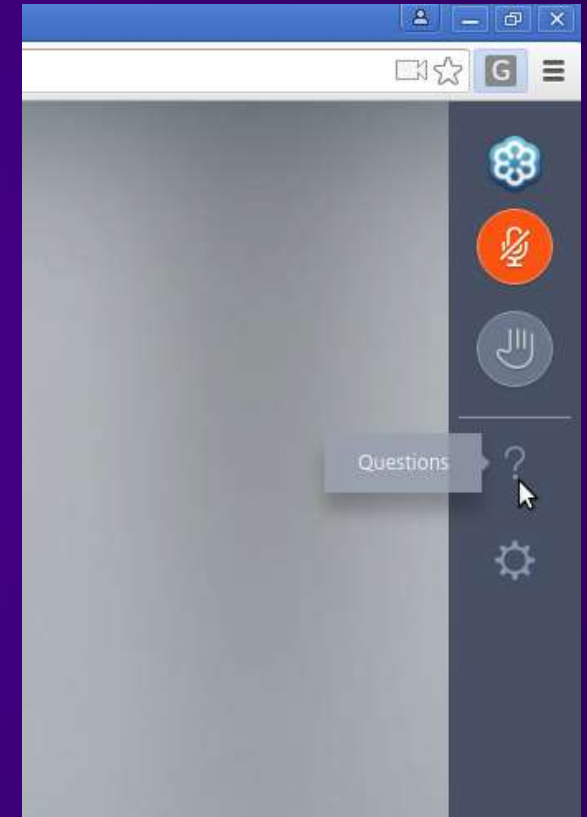
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www.southwareanswers.com



For Questions During Webinar



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eazy**stock**

 aptean

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SouthWare


Tax compliance done right

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Special Webinar

**Optimized Inventory Management for
Southware with EazyStock**

**Webinar registrants will be automatically entered to
win a \$100 Amazon gift card!**

Winner will be announced at the webinar.

<https://info.eazystock.com/southware-conference-2021-register-for-webinar>

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Tax compliance done right

Special Webinar

**What tax-exempt sellers need to know
to manage tax compliance & reduce audit risk**

**Webinar registrants will be automatically entered to win a \$100
Visa gift card! Winner will be announced at the webinar.**

**[https://avalara.zoom.us/webinar/register/
7916345981322/WN_IG03hzJ2RbGwsQnqIIM3sQ](https://avalara.zoom.us/webinar/register/7916345981322/WN_IG03hzJ2RbGwsQnqIIM3sQ)**

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What is the SPA?

- **Community of Southware Resellers**
- **Meet weekly to discuss improvements, support and best practices**
- **Depend on one another for experience and resources**
- **Pool resources to create solutions, host webinars & events**
- **Communicate with Southware regarding product & user experiences**

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SPA Members

- **BTM Solutions**
- **Complete Computer Support**
- **Exerve**
- **Flexware Systems**
- **Florida Business Solutions**
- **Opus**
- **Pearce Computer Services**
- **Timesavers**

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Don Ewing – In Memory



- **Founder/President - Florida Business Solutions**
- **Board Member – Clearwater Chamber of Commerce**
- **SouthWare Partner for over 35 years**
- **Former Chairman – Southware Partner Council**
- **Avid Sailor**

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Do Not Forget...

- **Conversion & Renumbering Tools**
- **Document Scanning**
- **Manufacturing**
- **NACHA Payroll**
- **Workflow Tools**
- **E-Commerce**
- **and much more...**

Ask Your Partner!

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Flexibility 2019

flexibility | noun | flek-suh-bil-i-tee | the quality of being easily adapted or of offering many different options

“The measure of intelligence is the ability to change.” – Albert Einstein

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Flexibility

- **SouthWare Offers:**
 - Flexible Application Setups
 - Approximately 10,000 Control & Operator Settings
 - Dozens of Override Situations
 - Customized Applications and Web Portals

**Configure Solution to Address
New Business Opportunities**

Customization Modules

- WorkFlow
- ReportMate
- ImportMate
- Extended Data
- NetLink
- Live Portals
- OfficeLink
- Field Filters
- TaskWise
- Monitors & Alerts
- Forms Adapter
- EDI/DocTransfer
- International Transactions
- Constructed Variables
- RCF Packets
- and more...

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Velocity 2020

velocity | noun | vuh-los-i-tee | rapidity of motion or operation; swiftness; speed

In contrast to speed, **velocity** is direction aware.

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Velocity – How to Increase

- **Use Quick Process & Work Cycles**
 - Eliminate wasted steps and focus on desired result
- **Recognize Need to Change Direction Early**
 - Refocus business objectives and processes to meet changing challenges
- **Maximize Visibility**
 - What is everyone doing and are they meeting expectations and business needs

Continuity

“The lack of continuity means things go wrong.” – Times, Sunday Times (2012)

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Continuity

continuity | noun | con·ti·nu·i·ty| unbroken and consistent existence or operation...

cohesion

stamina

STABILITY

durability

vitality

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Continuity... Unbroken



You, Your Partner & SouthWare

- Southware Continuous Development since 1984
- Same Codebase Handles All Supported Platforms & User Interfaces
- Current Customers Using Southware Over 35 Years

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Continuity... Consistent

- User Interface: Blue Screen → Windows → Browser

The image illustrates the continuity of the SouthWare user interface across different platforms. It shows three stages: a legacy blue-screen terminal interface, a Windows-style desktop environment, and a modern web browser interface. The blue screen shows a menu with options like 'Accounts Payable', 'Accounts Receivable', 'Cash Flow Ledger', 'SouthWare DocTransfer', 'Fixed Assets', 'General Ledger', 'ImportMate II', 'Inventory/Sales Series', and 'International Transactions'. The Windows-style desktop shows a 'SouthWare' logo and a 'Shortcut' menu with the same options. The web browser interface shows a 'SouthWare Web Menu' with a grid of icons for various business functions, including 'Accounts Payable', 'Accounts Receivable', 'Cash Flow Ledger', 'SouthWare DocTransfer', 'Fixed Assets', 'General Ledger', 'ImportMate II', 'Inventory/Sales Series', 'International Transactions', 'Job Cost', 'Payroll', 'Reports', 'Assemblies', 'Enter Service Orders', 'Equipment Portal', 'Field Deposits', 'Mobile Tech Portal', 'SIO Scheduling Portal', 'Service Manager Portal', and 'Service Orders Portal'.

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Continuity... Operation

SouthWare Delivers

- Familiar Processes
- Controlled Enhancements
- Optional Change → When You Need It
- Personalization & Flexibility → When You Want It

Continuity... Change



Powered by OSAS
SouthWare

Powered by OSAS
SouthWare
From Aptean

“To be flexible and to change constantly and effectively is made easier by high-level continuity.”

(Michael Porter)

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Continuity... High Level

Powered by SAS
SouthWare
From Aptean



- Familiar Local Support and Service – Backed by Global Business Scale
- More Complementary Solutions from One Single-Source Vendor
- Solutions for Unique Customer & Industry Demands

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Continuity... Your Team

- Team Building & Training
- Documentation for each Role & Process
- Simplification & Optimization of Business Operations
- End-to-End Business – Connected Processes

Continuity... Southware

Coming Soon...

- **New Customer Auto-Pay Balance Portal**
 - Auto Charge Customer Balance to Default Credit Card
- **New Return Authorizations Portal**
- **Various ReportMate & ImportMate Enhancements**
- **Aptean CRM**
- **and more...**

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Continuity... Apteian Cloud

Option to host SouthWare on Apteian Cloud

Option to license SouthWare as a SaaS (Software as a Service)

- **Enhanced Security** – secure, monitored online environment ensures maximum privacy and offers protection against a breach of your data
- **Fewer Costs** – Running your own data center is expensive; avoid unplanned expenses with defined, predictable costs
- **No On-Premise Equipment** - Eliminate those costly Server hardware purchases and upgrades, and no more expensive hardware maintenance
- **Scalable Growth** – do not pay upfront for your future needs – scalable model allows dynamically computing power and capacity as you grow
- **Always Backed-Up** – Even if your facilities suffer from something like a natural disaster or hardware failure, rest assured that your data is backed up and still available

Connect & Work

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Continuity...

Continuity is not the absence of change it is a state of being inside of an environment of constant change.

- Plug in with Your Partner
- Take Advantage of Training Opportunities
- Document Important Processes
- Simplify Business Operations

Today

1 PM

Thursday

Welcome & 2021 Keynote

Welcome to the 2020 Southware User Conference presented by the Southware Partner Alliance.

1:40

Thursday

Southware Genius Video: Avalara Sales Tax Management

Learn about getting sales tax peace-of-mind with Southware and Avalara.

2 PM

Thursday

Aptean CRM

Announcing Aptean CRM - learn how it can help you manage your customers.

2:35

Thursday

Southware Genius Video: Power SQL Functionality

Learn about driving efficiency, productivity, and connectivity with Southware SQL Sync.

Agenda, Videos & Slides

[www.southwareanswers.com/
resources2021](http://www.southwareanswers.com/resources2021)

**Slides and Videos
available in 7 to 10
days.**

Today

3 PM

Thursday

Accounting: Automated End of Day & Excel Reporting

Would it be nice if you didn't have to manually run the same reports and postings every day, and reports automatically showed up in your email?

Join us to see how this can be done at your workplace. We will also be discussing the ExcelReport module and how it can help with Quality Control Management.

End-User Presentation with Live Q&A

3:50

Thursday

EasyStock Special Video

Learn about optimizing your inventory with EazyStock.

4 PM

Thursday

Dive Into the Southware Inventory Matrix & Marketing Catalog

For managing sales of groups of related items, Southware offers many options for improvement. As we illustrate the options available in these components, bring your marketing and inventory thinking caps to see how to best enhance your customer service.

Agenda, Videos & Slides

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**Slides and Videos
available in 7 to 10
days.**

Today

4:30
Thursday

Features: New & Review

Southware has recently released a slew of new and enhanced features. Join this session with an eye toward revisiting business processes you have defined over the years and now have new options to improve.

5 PM
Thursday

Wrap-Up: Announce Door Prize

Winter Training Schedule Announced - [Click Here to Register Now!](#)

See You Next Year!

Agenda, Videos & Slides

[www.southwareanswers.com/
resources2021](http://www.southwareanswers.com/resources2021)

**Slides and Videos
available in 7 to 10
days.**

Coming Soon

[southwareanswers.com/
webinars](https://southwareanswers.com/webinars)

**2021 Digital User Training
Nov – March 2022**

Winter Training Series

- Customer Round Tables
- Service Management
- Inventory Sales
- Accounting
- Boot Camp

**WEBINAR:
Avalara & EazyStock
November 2021**

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Winter Training Series

Agenda

Nov 11

Fully Integrated Service Management

Join us for a discussion on the fully integrated nature of SouthWare Service Management.

Dec 9

Customer Roundtable - Accounting

Join us for this accounting session, where we will be discussing standard accounting procedures including year end processes

Jan 20

Customer Roundtable - Inventory Sales Distribution

We will discuss Standard SouthWare features to give you a better handle on your Inventory and unleash the power of your inventory.

Feb 17

Southware Security

During this session we will discuss how to negotiate security concerns of your broader network and manage efficient operation of Southware.

schedule subject to change

Winter Training Series

Agenda

Mar 17

Southware BootCamp Q&A

Learn how to use Southware like a pro.

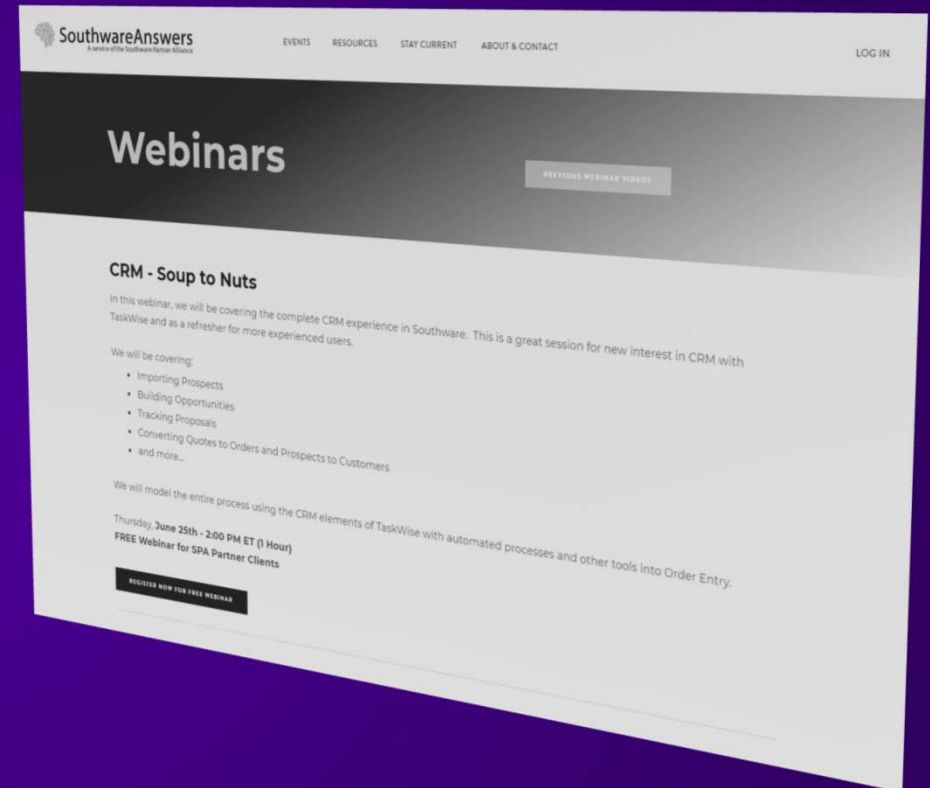
- **All Classes Only \$299**
- **Early Bird Only \$199! Expires Oct 29th**
- **Includes 2020 Fall Training Video Resources**

schedule subject to change

Winter Training Series

[www.southwareanswers.com/
wintertraining](http://www.southwareanswers.com/wintertraining)

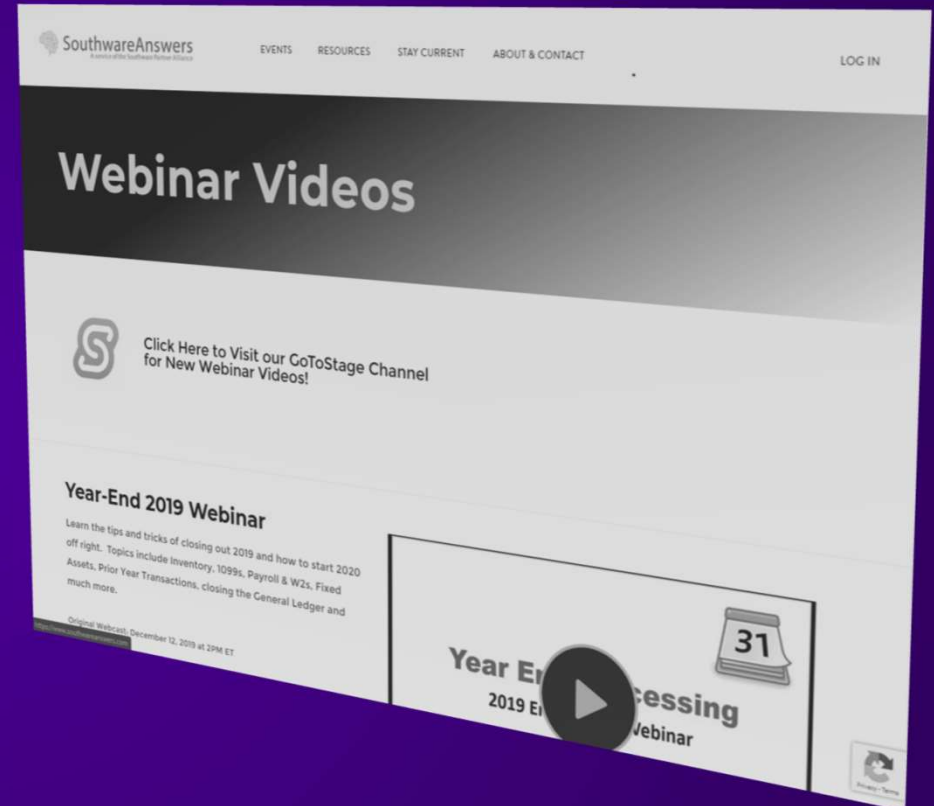
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Prior Webinars

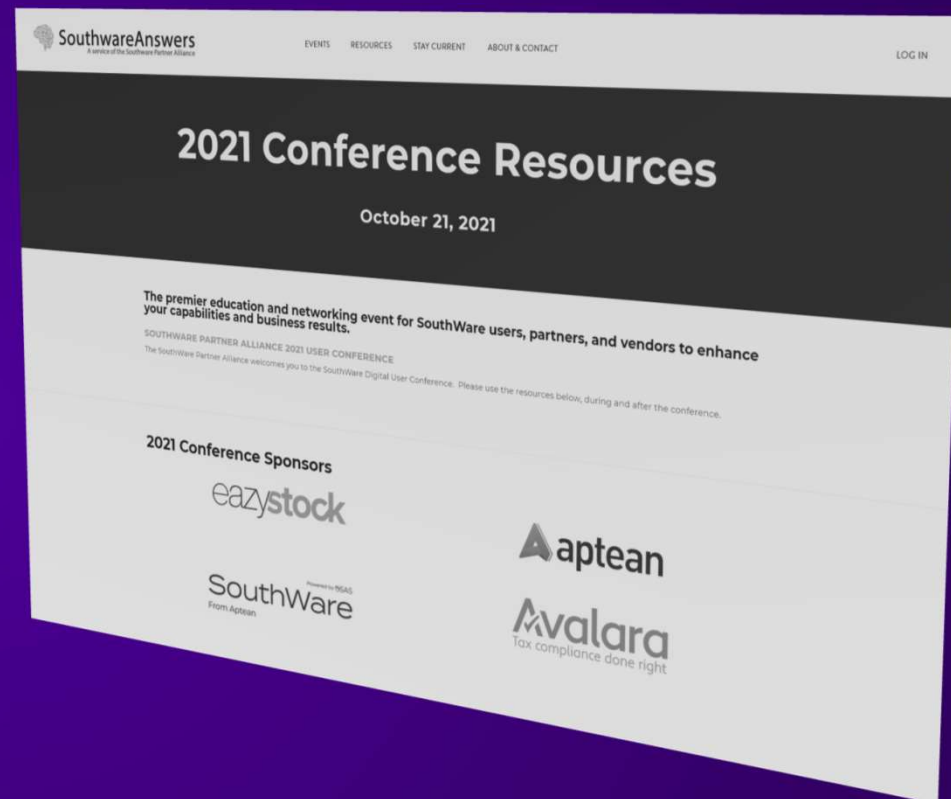
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2021 Conference Resources

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Questions

**Connect with your
Southware Solution
Partner**



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Genius Videos



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