

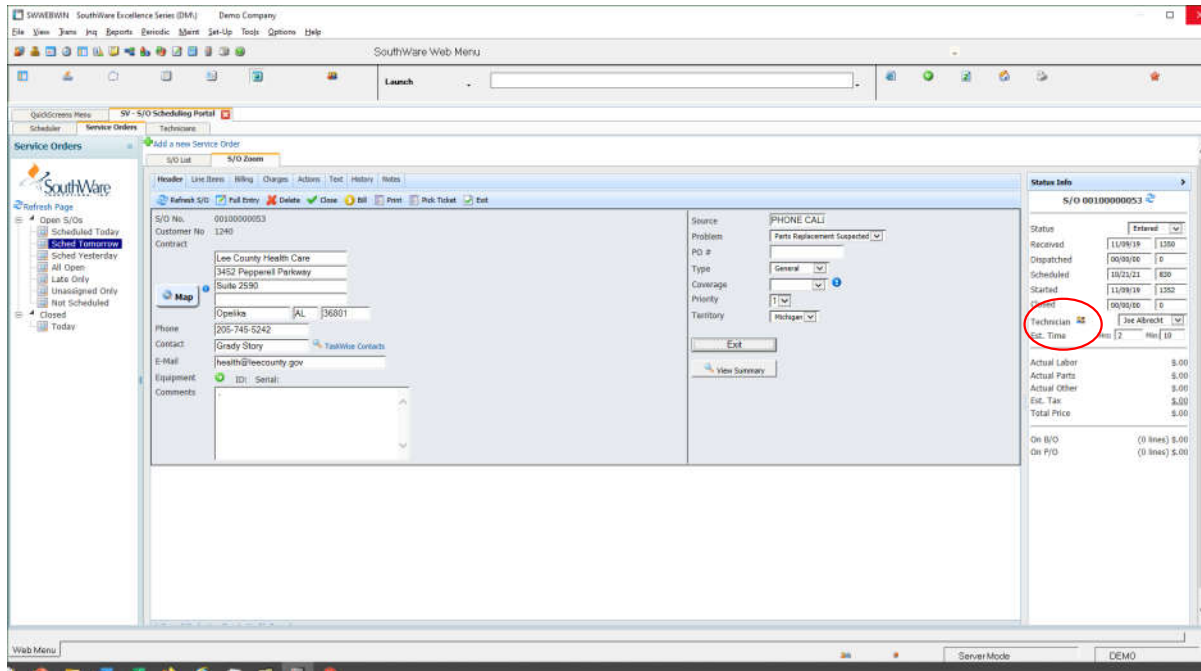


Be a Southware Genius

2021 SPA Digital Conference

Split Schedules

- Released – SO Portal Split Schedule – July 2020



2021 SPA Digital Conference

Split Schedules, 2

The screenshot shows a software window titled "Scheduler Board (Breakout)". The window contains the following information:

Status: E
S/O#: 0010000053 Cust: Lee County Health Care Type: GEN Prob: PRT Terr: MI
Contact: Grady Story 205-745-5242 Rec'd: 11/09/19 13:50 Cover: REN Pri: 0

1. Sched Start: 10/21/21 08:30
2. Responsible: Joe
3. Tot Est Hrs: 2.17 Total of Scheduled Hours: 2.17
4. Assignments:

Est hrs	Technician	Sched Date	Sched Time	Description
1.17	Joe	10/21/21	08:30	1st trip
1.00	Joe	10/22/21	08:30	2nd trip

.F3 Calendar

DEMO 10/20/21

Hitting the split button brings you to this screen where, you can break up the int

SQLSync – Rebuild from a specific date

This new feature will allow you to rebuild key history files from a specific date so that you will no longer need to rebuild the whole file when the sync process doesn't complete.

The new process reads the history files in reverse order and will create SQLSync transactions that will get posted to the MSSQL tables from the SQLSync Background server.

There are two new options in the SQLSync Manager:

- Choose "History Files to build from a specific date" to create transactions in the SQLSync transaction file that will be posted to MSSQL from the Background server.
- Choose "Create new SQL Table from a specific date" to create the MSSQL table and create transactions in the SQLSync transaction file that will get posted to MSSQL from the Background server.

Rebuild Replicated SQL Tables

Click on the option you prefer and then select the files to rebuild from a specific date by clicking on each file.

Once you have selected your files to rebuild, press the <F8> to exit the file selection and then enter the Starting System Date. The history file is processed by reading the last record in the file and processing the record by checking the timestamp date created. Then the program reads the previous record and qualifies it until the date created is less than the starting create date.

Forms – 2 serial numbers/line

Bill To: Columbus Auto Parts
1505 Victory Boulevard
Columbus GA 30050

Ship To: 404-528-4851
Columbus Auto Parts
1505 Victory Boulevard
Columbus GA 30050

Invoice#	Order#	Customer#	Customer P.O.#	Terms	Salesperson
57	78	350		Prx 2/5 Due 20	UPS-Ground/Res
11/30/19	11/30/19				2

Units	U/M	Item Description	Disc	Unit Price	Amount
		***** DUPLICATE COPY *****			
2	EA	305 Canon 3311 Personal Typewriter Serial Numbers: 262 263		200.00	400.00
1	EA	760-76F		800.00	800.00

2021 SPA Digital Conference

New Printer Options – specify landscape or portrait, number of copies and duplexing in the printer record

08. Page Setup

Search Enter Help Exit

Formfeed Flag	E	FF at End of Job
Single-sheet feed?	<input checked="" type="checkbox"/>	
Print Line Size	80	
Max Lines Per Page	59	
Page Style ID		
Adjust Margins?	N	
Margin Units		
Top Margin	.00	
Bottom Margin	.00	
Left Margin	.00	
Lines per Page	0	
Override Orientation	L	Landscape
Override # Copies	3	
Override Duplex	2	Duplex

Exit

Order Approval 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 - Approve Orders

Orders to Approve

Click on to Approve, Click on to View

Oper: OE Refresh Approve All Help

Order #	Date	Amount	Oper	Order Type	Cust #	Name	Sls	Loc #
	198	10/24/19	\$115.75	INV	R	1 Carl Sanders	BTR	001
	244	10/20/21	\$9,980.00	OE	R	1 Carl Sanders	BTR	001
		\$10,095.75						
Total Records: 2								

Order Number: 198
 Location: 001
 Type: R
 Order Date: 10/24/19
 Ship Date: 00/00/00
 Customer: 1 - Carl Sanders
 123 Magnolia Avenue
 Auburn, AL 36830

PO #:
 Salesperson: BTR
 Total Price: 115.75
 # Line Items: 2

Item	Description	Qty
100	747 Swingline Desk Stapler	2.000
100-BLUE	747 Swingline Desk Stapler	3.000

Web Menu Server Mode DEMO

Override standard grids

IS-01-02-01 SouthWare Excellence Series (DM) Demo Company

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Enter and Edit Orders

Period 12 thru 12/31/19
OE # Open: 34 \$ Open: 51,378.99

Header Items Payment/Totals

Order# 24 Carl Sanders POS

Type Regular

Order#	Ln#	Stock # Shipped	Description 1	Description 2	Description 3	Qty Ordered	Unit Price	Extend Price
24		10 100	747 Swingline Desk Stapler	7 1/4" long		1.000	19.96000	19.96
24		20 225L-BLUE-M	Ladies' Interlock Sport Shirt	8oz 100% Cotton	BLUE/M	3.000	25.31800	75.95
24		30 225L-RED-M	Ladies' Interlock Sport Shirt	8oz 100% Cotton	RED/M	10.000	25.31800	.00
24		40 225L-RED-S	Ladies' Interlock Sport Shirt	8oz 100% Cotton	RED/S	5.000	25.31800	126.59

Order 475.68 Weight 36.50 Invoice Total 222.50
Cost 208.05 Margin 56.26% Margin \$ 267.63

18. Line #		19. Ty		H/C		24. Quantity	
20. Item #				Loc		25. Unit Price	
21. Desc						26. Unit Cost	
						27. Qty Shipped	
						28. Qty B/O	
22. U/M		Weight				29. Ship Date	
23.+Other Info							

Finish

Exit

Enter Add Line Item F3 Lookup F4 Return to Header
F5 Selector F6 Sales History

Web Menu Sales Order Entry

DEMO 10/20/21 18

Use variables as selection criteria

The screenshot displays the SouthWare Excellence Series (DMV) software interface for configuring a report. The window title is "RM-06 SouthWare Excellence Series (DMV) Demo Company". The menu bar includes File, Edit, Approx, Search, Next, Previous, Enter, Options, Breakout, Link, and Help. The main area is titled "For Your Information (RM)".

Configuration options include:

- Category: rs07
- ID: MYSALES
- Output Limit (RS07 - Sales Order (header)): 0
- Fields to Retrieve: Order Number (*Pri), Customer Number (*Alt), PO Number (*Alt), Order Entry Type (*Alt), Total Price, Total Cost, Total Discount, Salesperson, Logon Salesperson
- Parameters: If Salesperson (EQ) 'XX990028' (Req), Add a selection rule, Add a sort
- Custom Layout
- Advanced Editing
- Copy to Another Format
- Select DoWork IDs

The bottom status bar shows "Web Menu: ReportMate Report Portal", "DEMO", "10/20/21", and "8701PR".

Notes + XD for Inventory Adjust...

IS-06-01-01 SouthWare Excellence Series (DM) Demo Company
File Edit Approx Search Next Previous Enter Options Breakout Link Help

Enter / Edit Inventory Transactions

*1. Transaction #	11	Oper	INV
2. G/L Post Date	10/20/21		
3. Date	10/20/21		
4. Type	A Adjustment		
5. Stock Number	100	747 Swingline Desk Stapler	EA
6. Location	001	Update Usage? N	
Transfer To Loc	N/A		
7. Tracking Number			
8. Job ID	N/A		
Cost Code	N/A		
9. Quantity	48.000	U/M	EA
10. Cost	10.950	Extended:	525.600
11. Reason Code	MNT	Management Adjustment	
12. G/L Account #	6140-000	Repair and Maintenance	
13. Reference			
14. Storage ID			

to change - QK Cancel

Notes

DEMO	10/20/21	92
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Web Menu Inventory Transaction Entry

Inventory Ledger Entries now in Activity History

The screenshot displays the 'Inventory Manager Portal' for '747 Swingline Desk Stapler'. The 'Activity List' table shows the following data:

Reference	Activity Type	Activity Date	Activity Time	Activity Source File	Qty	Extended Cost	Extended Price	Si
Whs Trx #: 341 Source: Key: 22	Whs Trx	07/11/19	1118	IV69	.000	\$0.00	\$0.00	
Svc Order #: 00100000074 Line #: 1:20 Type: Invent	Service Order	09/18/19	1654	SV06	1.000	\$10.95	\$24.95	
Order #: 42 Line #: 10 Type: Inventory	Sales Order	09/23/19	0	RS08	4.000	\$43.80	\$86.82	
P/O #: 34 Line #: 40 Type:	Purchase Order	09/30/19	0	IV26	5.000	\$547.50	\$0.00	
Vendor Return #: 0000000011 Line #: 20	Vendor Return	10/24/19	0	RA02	1.000	\$0.00	\$0.00	
Vendor Return #: 0000000011 Line #: 30	Vendor Return	10/24/19	0	RA02	1.000	\$0.00	\$0.00	
CRA # 0000000010 Customer Return Authorization	Customer Return	10/24/19	0	RA03	5.000	\$0.00	\$0.00	
Order #: 197 Line #: 10 Type: Return	Credit Memo	10/24/19	0	RS08	-5.000	\$-54.75	\$-124.75	
Order #: 198 Line #: 10 Type: Inventory	Sales Order	10/24/19	0	RS08	2.000	\$21.90	\$49.90	
Sales	Ledger - SALE	11/25/19	195906	IV15	1.000	\$10.95	\$24.95	
Sales	Ledger - SALE	11/26/19	154513	IV15	1.000	\$10.95	\$24.95	
Receivings	Ledger - REC	12/12/19	191908	IV15	50.000	\$547.50	\$0.00	
P/O #: 62 Line #: 30 Type:	Purchase Order	02/01/20	0	IV06	100.000	\$10,850.00	\$0.00	
Physical Adjustment	Ledger - PHYS	02/10/20	151229	IV15	826.000	\$9,044.70	\$0.00	
P/O #: 70 Line #: 10 Type:	Purchase Order	02/17/20	0	IV06	100.000	\$10,850.00	\$0.00	
Receivings	Ledger - REC	02/17/20	102706	IV15	1000.000	\$10,850.00	\$0.00	
Receivings	Ledger - REC	02/17/20	112233	IV15	50.000	\$547.50	\$0.00	
Order #: 203 Line #: 20 Type: Return	Credit Memo	02/21/20	0	RS08	-5.000	\$-54.75	\$-124.75	
Total Records: 102					6746	\$66,634.05	\$23,712.58	\$

Inventory Ledger Entries now in Activity History

The screenshot displays the SouthWare Inventory Manager Portal. The main window shows the 'Activity History' for Stock Number 100001, identified as '747 Swingline Desk Stapler'. The activity log table is as follows:

Activity Details	
Type	S Sales
Quantity	-1.000 EA
Stock Number	100
Location	001
Date/Time	11/26/19 15:45:13
Trx Date	11/26/19
Format Decimal	3
Unit Cost	10.95000
Reference	
PO Date	11/26/19
Req Ship Date	00/00/00
Operator	INV
Reason Code	
Inv Type Code	
Update Usage	Y
Receivings Info	
G/L Post Data	11/26/19
Inv Acct No	1311-010
Doc Line No	10
Customer Number	1
Vendor Number	
Job ID	
Cost Code	
Trx No Work Order No	332

FLEXXD

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 - Enter Order/Quote

Order#: 243 Oper: OE Refresh Full Entry Hold Delete Copy E-Mail Picking Ticket Order Acknowledgement Finish

Carl Sanders (1) 123 Magnolia Avenue Auburn, AL 36830 Contact: Carl Sanders @ 334-821-2342 Credit Avail: \$.00	Order Date: 10/19/21 PO#: <input type="checkbox"/> Type: REGULAR Salesperson: BTR-Blake Robbins Terms: 2 (2/10 Net 30) Location: 001	Item Subtotal: \$1,367.76 Taxes (1): \$68.39 Freight: \$.00 Other Charges: \$.00 Payments: \$.00 Balance Due: \$1,436.15
---	---	---

Order Items Billing/Payment Misc Chgs Shipping Text Recent Purchases Notes Ext Data

Refresh Page

ORDER HEADER FIRSTXD

List Add

Current XD Records

DATE	TIME	ENTRY	ENTRY DATE	ENTRY CODE	ENTRY AMOUNT	ENTRY NUMBER	ENTRY GL ACCT	ENTRY OTHER FIE	ENT
10/20/21	215139	Informator	10/20/21		45.00				Addin
10/20/21	215211	Then more	10/21/21	IV	78.00				Don't

Total Records: 2

Record Data

Refresh Full Fit

Date: 10/20/21
Time: 215211

ENTRY: Then more information later

ENTRY DATE: 10/21/21

ENTRY CODE: IV

ENTRY AMOUNT: 78.00

ENTRY NUMBER:

ENTRY GL ACCT:

ENTRY OTHER FIE:

ENTRY COMMENT: Don't forget about how long this line can be. You can type a lot

Web Menu Server Mode DEMO

Pricing Review Portal

The screenshot displays the SouthWare Pricing Review Portal interface. The main window title is "SWWEBWIN - SouthWare Excellence Series (DM) Demo Company". The interface includes a menu bar with options like File, View, Trans, Inq, Reports, Periodic, Maint, Set-Up, Tools, Options, and Help. Below the menu bar is a "SouthWare Web Menu" section with a "Launch" button. The main content area is titled "Price Review" and shows a "Price List for Carl Sanders".

Customer Information: Carl Sanders - Auburn, AL. Customer Number: 1. Price Level: 1. Trade Discount: .00.

Price List Options: Location: All, Product Category: All, Stock No (blank for ALL):, Quantity for Pricing: 1. A "Get Pricing" button is visible.

Stock Number	Lic	Cat	Description	Quote Qty	U/M	Unit Price	Price Source	List Price	List Discount	Ext Price
*MISC	001	PP	Miscellaneous Non Stock	1.000	EA	0.000	Stock (1)	.00000	.00	\$0.00
150	001	OS	747 Swingline Desk Stapler	1.000	EA	19.960	Stk / Cust	24.95000	4.99	\$19.96
150-BLUE	001	OS	747 Swingline Desk Stapler	1.000	EA	21.95	Stock (1)	24.95000	3.00	\$21.95
150-TRN	001	OS	747 Swingline Desk Stapler	1.000	EA	21.95	Stock (1)	24.95000	3.00	\$21.95
181	001	OS	Swingline Half Size Stapler	1.000	EA	6.50	Stock (1)	6.99000	.49	\$6.50
181	002	OS	Swingline Half Size Stapler	1.000	EA	6.50	Stock (1)	6.99000	.49	\$6.50
181	003	OS	Swingline Half Size Stapler	1.000	EA	6.50	Stock (1)	6.99000	.49	\$6.50
185	001	OH	Panasonic Phone/Answering Sys	1.000	EA	200.00	Stock (1)	190.00000	-10.00	\$200.00
185	002	OH	Panasonic Phone/Answering Sys	1.000	EA	200.00	Stock (1)	190.00000	-10.00	\$200.00
185	003	OH	Panasonic Phone/Answering Sys	1.000	EA	200.00	Stock (1)	190.00000	-10.00	\$200.00
186	001	OH	Wiring Set-up for Phone System	1.000	EA	160.00	Stock (1)	180.00000	20.00	\$160.00
200	001	OS	Plantkips	1.000	10s	0.0045	Stock (1)	.00450	.00	\$0.00
295	001	OH	Canon PC-11 Personal Copier	1.000	EA	750.00	Stock (1)	995.00000	245.00	\$750.00
295	002	OH	Canon PC-11 Personal Copier	1.000	EA	750.00	Stock (1)	995.00000	245.00	\$750.00
295	003	OH	Canon PC-11 Personal Copier	1.000	EA	750.00	Stock (1)	995.00000	245.00	\$750.00
225L	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLK-L	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLK-H	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLK-S	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLK-XL	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLUE-L	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLUE-L	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32
225L-BLUE-H	001	AP	Ladies Interlock Sport Shirt	1.000	EA	25.318	Cat / Cust	38.95000	13.63	\$25.32

Total Records: 344

All price overrides for a customer can be tested in this portal, and where that price comes from can be seen.

Quote Review Portal

SouthWare Web Menu

QuickScreens Menu | IS - Pricing Review | IS - Sales Quote Review

Pending Quotes | Order 236

- View/Edit Quote | Add a new Quote

Order #	Date	Item Total	Salesperson	Bill-to Name	Cust#	#Lines	Phone
234	08/25/24	\$124.75	ADM	Continental LLC	999999	1	
236	10/20/20	\$374.25	ADM	Printed Maple	999999	1	
240	05/12/21	\$0.00	BTR	Hanfred Morris		2	205-749-0741
Total Records: 3		\$492.00				6	

Quote Info

[Turn to Order](#)

Order Number: 236
Order Date: 10/20/20
Customer: Printed Maple
123 Main
(# 999999)
San Antonio, TX 78232

Salesperson: AEM
Total Price: 374.25
Line Items: 1

Item ID	Description	Qty	Total
000	747 Swingline Desk Stapler	15,000	374.25
			374.25

Web Menu | Server Mode | DEMO

Locked Record Review

The screenshot displays the SouthWare System Administrator Portal. The main window is titled "System Administrator" and contains a "Locked Record Info" section. A table lists the locked records, with one record highlighted in yellow. The record details are as follows:

File	Operator	Record Key	Date Locked	Time Locked	WorkStation
RS07	DEMO	240	05/12/21	165157	002

Below the table, it indicates "Total Records: 1". To the right of the table, the "Locked Record Info" section provides details for the selected record:

File ID: RS07
Record Key: 240
Date Locked: 05/12/21
Time Locked: 165157
Workstation: 002
Operator: DEMO

A red warning icon indicates "Not locked today." Below this, the user information is displayed:

Name: DEMO OPERATOR
Last Logon: 10/21/21 ON
E-Mail:

Questions

**Connect with your
Southware Solution
Partner**



Thank You Sponsors!

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Tax compliance done right



Coming Up Next...

2021 SPA Digital Conference