



Live Portals

**Bring Your Whole
Business Into View**

Welcome

Hosts Today

Nolan

Nolan Breazeale

SPAwebinar

www.southwareanswers.com

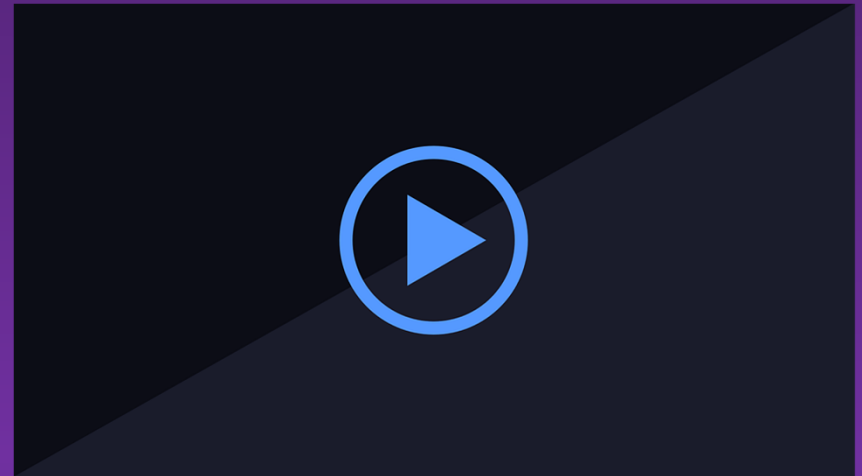


Opening Poll Questions



SPAwebinar
www.southwareanswers.com

Video of webinar



**Receive Email in
approx. 24 Hours**

SPAwebinar
www.southwareanswers.com

2020 Conference

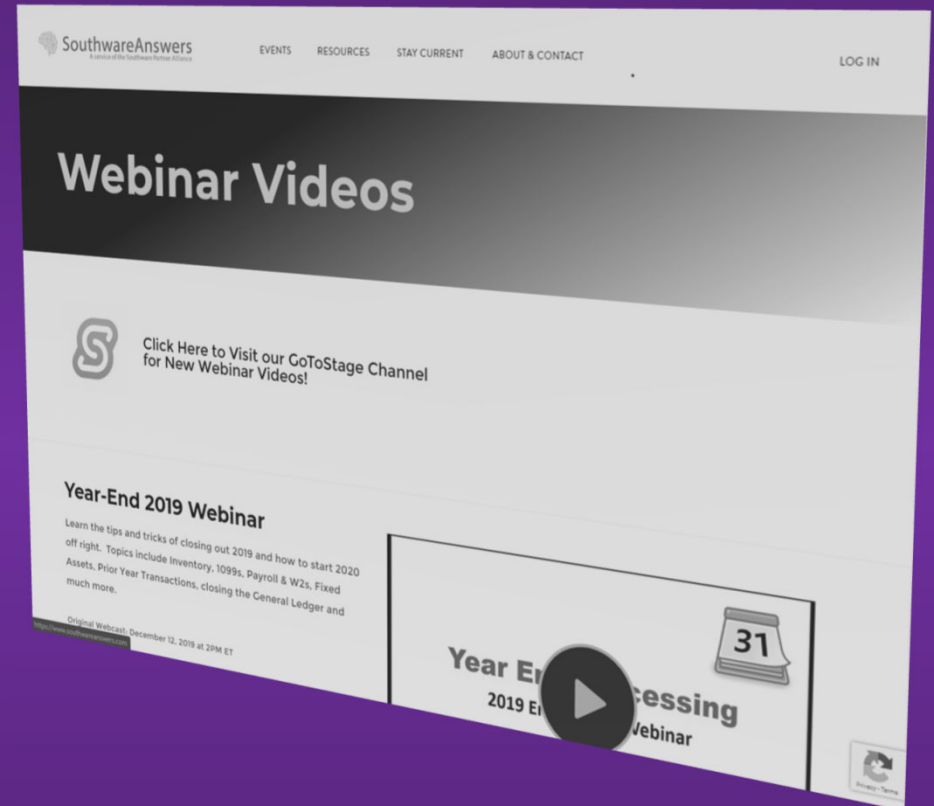
[www.southwareanswers.com/
resources2020](http://www.southwareanswers.com/resources2020)



SPAwebinar
www.southwareanswers.com

Prior Webinars

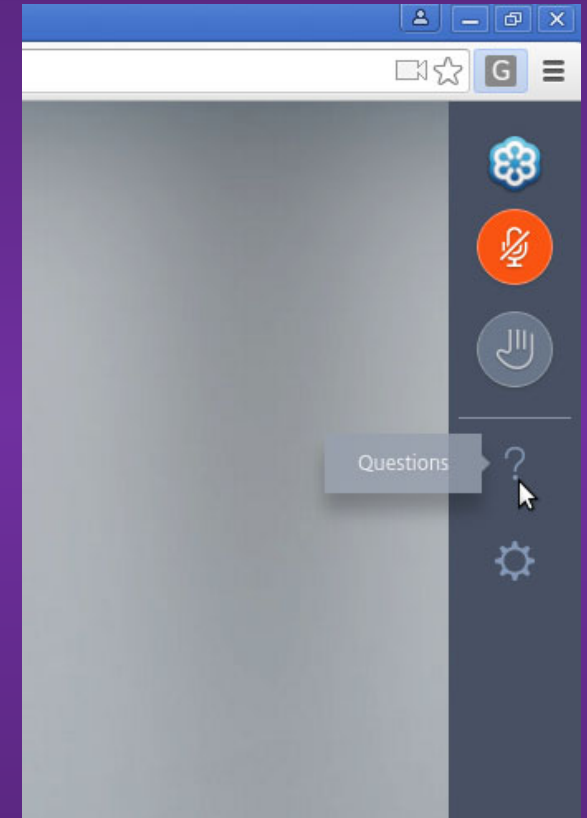
[www.southwareanswers.com/
videos](http://www.southwareanswers.com/videos)



SPAwebinar
www.southwareanswers.com



For Questions During webinar



SPAwebinar
www.southwareanswers.com

Questions

Get with your Southware
Solution Partner



SPAwebinar

www.southwareanswers.com

Portals – Basics

- Integrated Browser – All Southware and more
- Stand Alone Browser – Limited Functionality – Great for
 - Sales Reps
 - Executives
 - Analysis & Reporting
 - Not Great for Heavy Processing
 - End of Day / End of Month
 - Accounts Payable
 - Payroll, etc.



Portals – Requirements

- **Southware Revision 15 or Higher**
 - Current CMSS required for all features
 - Windows Client/Thin Client required for integrated portals
- **Web Server Configured on Southware Server**
 - IIS or Apache
- **Public IP Address or Domain Name**
 - (for remote browser-based access)
- **Security: Firewall / Proxy / SSL Cert / VPN**
 - (considerations for remote browser-based access)

**Schedule with
Partner to Review**

Portals – Value

- User “Home Base”
- Southware Application Access (integrated browser)
- Inquiries & Drill Arounds
- Data Entry & Transactions
- Custom Menus, Inquiry and Processes
- Simple, Efficient, Easy to Learn

Portals – Takeaways

- What processes need to be simpler in your business?
- What data should be pulled forward and readily available for users?
- How could I transform my business – making it more efficient, accurate and profitable?

Live Portals

QuickScreens Main Portal

The screenshot displays the SouthWare Web Menu interface within a browser window titled "SouthWare Excellence Series (DM) Demo Company". The interface is organized into several sections:

- QuickScreens Menu:** Located at the top left, it includes a "Refresh" button and "Options".
- SouthWareAnswers:** A section on the left providing updates on "Technician Time Tracking", "SouthWare CashFlow Deposit Portal", and "Tech Mapping and GPS".
- Product Menu:** A vertical list on the left side containing categories such as Accounts Payable, Accounts Receivable, Cash Flow Ledger, and Payroll.
- Portal Links:** The main area of the interface, featuring a grid of 40 icons representing various business functions, including AP - A/P Portal, AR - A/R Portal, IS - Order Entry Portal, and SV - Service Orders Portal.
- Navigation and Status:** At the bottom, there is a search bar, a status bar showing "Open Tasks (36)", "Alerts (0)", and "Messages (0 Unread)", and a "Web Menu" button.

Portal Navigation

SWWEBWIN SouthWare Excellence Series (DM) Demo Company

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

SouthWare Web Menu

Launch

QuickScreens Menu AR - A/R Portal

AR Operator

Status Info

Launch Menu

Refresh Page

Customer Number: Go

Find by Name/Contact: Go

Find by Key Word: Go

- Customers
- Open Order Activity
- Related Inquiries
- AR Reports
- All Reports
- FYI For AR
- Statement Processing
- Periodic Processes
- Maintain Files
- Set Up
- Operator Info
- Help

Customer List

Number	Customer Name	Sales Year To Date	Sman	Contact	Phone	City	State	EMail Address
4000	Home Depot	\$54,863,284.05	BTR	Carl Sanders	338-821-2342	Atlanta	GA	CARL@SANDERS.COM
1	Carl Sanders	\$17,013.21	BTR	Carl Sanders	338-821-2342	Atlanta	AL	CARL@SANDERS.COM
1950	Southern Design	\$8,518.00	WTG	Danny Lawson	404-352-1622	Atlanta	GA	design@southern.com
6	Rose O'Brien	\$6,649.00	BTR	Rose O'Brien	404-563-2278	Macon	GA	rose@rose.com
350	Columbus Auto Parts	\$6,621.26	WTG	John Stinson	404-528-4851	Columbus	GA	columbus@autoparts.com
3350	Jackie's Beauty School	\$6,050.00	2X	Jackie Trifford	770-559-8080	Gadsden	AL	jackie@school.net
600	First Finance	\$5,667.00	AEM	Kenneth Whitley	334-887-9421	Auburn	AL	firstfin@mindspring.com
3354	Poster World	\$5,500.00	4	James Parker	205-783-7525	Lafayette	AL	poster@world.net
1150	Kleen Carpet	\$5,130.00	3	Jeremy Jackson	205-749-5536	Opelika	AL	kleen@carpet.com
560	Ernst's Grocery	\$4,950.00	BTR	Judy Bennett	804-699-8500	Richmond	VA	er@grocery.com
3366	CD Map Makers	\$4,590.00	4	Carl Davidson	205-983-2372	Montgomery	AL	cp@map.com
2	Manfred Morris	\$4,566.50	4	Manfred Morris	205-749-5741	Montgomery	AL	manfred@morris.com
150	Appleton's Haberdashery	\$4,526.50	BTR	Mary Jo Appleton	205-262-5841	Dothan	AL	jsmith@appleton.com
3368	Allen Bolt & Lock	\$4,350.00	3	K.C. Allen	205-396-4563	Salem	AL	allen@lock.com
7	Garth Rosen	\$3,875.03	4	Garth Rosen	205-749-4315	Opelika	AL	garth@sales.net
2050	Tick Tock Clocks	\$3,350.00	2X	Mike Trudgeon	206-775-8512	Seattle	WA	tick@tock.net
3360	SailSmiths	\$3,050.00	BTR	George Clinton	205-821-4545	Auburn	AL	sail@smith.com
810	Harrelson's Computer Centre	\$2,846.03	3	Peggy Harrelson	205-862-5296	Dadeville	GA	harrelson@comp.net
2250	Victoria Church of Christ	\$2,817.91	3	Sandra Landon	404-562-8523	Norcross	GA	victoria@church.net
3	Ryan Chance	\$2,671.50	BTR	Ryan Chance	313-234-2983	Charlotte	MI	RYAN@CHANCE.COM
3364	Buttons, Bows & More	\$2,151.75	2X	T.S. Opiester	770-336-7015 x 215	Montgomery	AL	buttons@bows.com
3352	Jerry's Auto Supplies	\$1,750.00	3	Jerry Harper	335-963-6363	Enterprise	AL	jerry@auto.com
4	Betty Jones	\$1,272.91	AEM	Betty Hines	205-776-2342	Mobile	AL	betty@hines.com
1240	Lee County Health Care	\$360.50	3	Grady Story	339-745-5242	Opelika	AL	health@leecounty.gov
Total Records: 55		\$54,972,529.78						

Web Menu

Server Mode DEMO

Inquiry & Reporting

SWWEBWIN SouthWare Excellence Series (DM) Demo Company

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

SouthWare Web Menu

QuickScreens Menu RM - Reports Portal

Reports

Select Application: A/R Reports Go to FYI

Accounts Receivable Reports

Standard Reports
The standard reports are fixed format reports with optional runtime parameters. You may output these for printing, display, or other options.

Ref Nbr	Description	Call Program/Object
AR0501	A/R Aging Report	ARAGINGR
AR0502	A/R Trial Balance Report	ARTRIALB
AR0503	Detailed Customer Activity Report	ARACTRPT
AR0504	Commissions Due Report	ARCMDUER
AR0507	Customer Labels	ARLBLPRT
AR050501	Sales Analysis By Customer Report	ARANALCU
AR050502	Sales Analysis By Cust. Type Report	ARANALTY
AR050503	Sales Analysis By Salesperson Rpt	ARANALSM
AR050504	Sales Analysis By State Report	ARANALST
AR050601	Customer Info Listing	ARCUSPRT
AR050602	Customer Names Listing	ARCUSALP
AR050603	Salesperson Commissions Report	ARSMANPR
AR050604	Ship Via Codes Listing	ARSHIPVP

Total Records: 20

FYI Reports (AR) Create a New Report
The FYI reports use SouthWare's ReportMate technology to provide access data in this application.

Format	Description	File
15CLASS1	First Class Example	AR01
872013	New Format	AR01
AFORE2	Customer Forecast	AR01
AFORECST	XL Customer Forecast	AR01
AR01HTML	Customer Listing	AR01
AR02GRID	Open Items Grid by Salesperson	AR02
AR02HTML	Open Item Listing	AR02
ARAGINGS	Invoice Aging by Salesperson	AR02
ARDAYS2P	Calculate Average Days to Pay	AR03
AROPENIN	A/R Customer Inquiry Override	AR03
AROPENGLD	G/L Dist for A/R Open Item	AR13
ARPAYTYP	A/R Card/Other Pay Types List	AR17
ARSUMTRL	Summary Trial Balance	AR02

Total Records: 148

Web Menu

Server Mode DEMO

QuickScreens Menu GL - Financial Statements

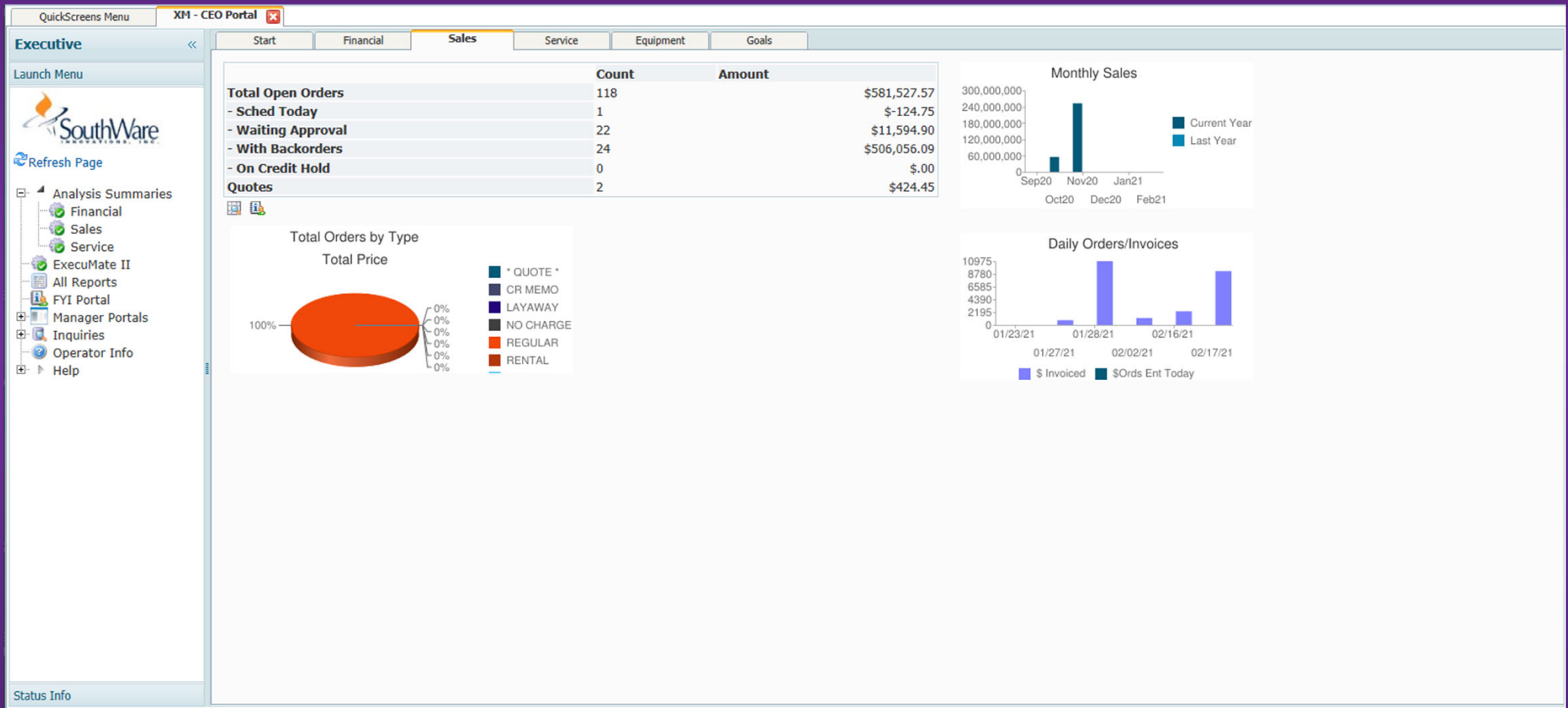
Financials Menu AUTO GEN OF STANDARD REPORTS(1)

Financial Statement Viewer: AUTO GEN OF STANDARD REPORTS (1 Type, Selection2)

Dates: LastYr YTD 01/01/20 thru 02/28/20 View Level: Format Lines?: Print Excel Edit Worksheet

Description	01/01-02/28 2020 PTD Actual	01/01-02/28 2020 YTD Actual	01/01-02/28 2020 PTD Budget	Ratio
Sales				
Sales				
Sales	54,863,864.05	54,863,864.05	48,000.00	12.64%
Sales	49,736.04	49,736.04	20,834.00	5.49%
Sales	.00	.00	22,500.00	5.93%
Sales-Rental	4,804.09	4,804.09	.00	.00%
Sales - Service Department	550.00	550.00	48,000.00	12.64%
Sales - Service Department	.00	.00	48,000.00	12.64%
Sales - Service Department	.00	.00	48,000.00	12.64%
Sales - Service Rev - Warranty	.00	.00	48,000.00	12.64%
Sales - Service Rev - Warranty	.00	.00	48,000.00	12.64%
Sales - Service Rev - Warranty	.00	.00	48,000.00	12.64%
Sales - Non Taxable	.00	.00	400.00	.11%
Total Sales	\$54,918,954.18	\$54,918,954.18	\$ 379,734.00	100.00%
Cost of Goods Sold				
Cost of Sales	.00	.00	20,146.00	5.31%
Cost of Sales	17,367.66	17,367.66	9,360.00	2.46%
Cost of Sales	.00	.00	6,710.00	1.77%
Cost of Sales-Rental	42.00	42.00	.00	.00%
Cost of Services	90.00	90.00	20,146.00	5.31%
Cost of Services	.00	.00	20,146.00	5.31%
Cost of Services	.00	.00	20,146.00	5.31%

Roles



Roles Portals - Examples

- CEO
- CFO
- Sales Manager
- Service Manager
- Technician
- Dispatch
- Buyer
- Customer Service
- Inventory Manager
- Order Entry
- Payroll
- System Admin
- Warehouse
- Director
- Auditor



Transaction Portals

CashFlow – Bank Deposit

QuickScreens Menu

CF - Bank Deposit Portal ✖

➔ Bank Acct: **Colonial** Thru Date: **04/09/19**
↻
✔ Select All
 ✔ Select List
 ✖ Clear All
 ✖ Clear List
 ?
✔

The list below shows payments not yet deposited. Click in the first column to select/unselect payments, then press "Post Deposit" to record these payments as deposited.

= Not Selected for Deposit
 ✔ = Selected for Deposit

	Pmt Date	Ref#	Amount	Drawer	Trx Oper	Reference 1	Reference 2	Source	Bank ID	Cash Type	S Oper	S Date
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	04/26/17	12354	\$100.00		ARC	Carl Sanders	Payment - Check # 12354	ARC	Colonial	1		
<input type="checkbox"/>	05/24/17	23456	\$500.00		ARC	Carl Sanders	Payment - Check # 23456	ARC	Colonial	1		
<input type="checkbox"/>	06/05/17	44567	\$100.00		ARC	Carl Sanders	Payment - Check # 44567	ARC	Colonial	1		
<input type="checkbox"/>	07/27/17	400	\$123.00		ARC	Carl Sanders	PAYMENT - Check # 400	ARC	Colonial	1		
<input type="checkbox"/>	07/28/17	123	\$500.00		ARC	Carl Sanders	PAYMENT - Check # 123	ARC	Colonial	1		
<input type="checkbox"/>	04/05/18	1234441	\$12,333.00		ARC	Carl Sanders	PAYMENT - Check # 1234441	ARC	Colonial	1		
<input type="checkbox"/>	11/19/18	CASH133143	\$123.00		ARC	Manfred Morris	PAYMENT - Paid By Cash	ARC	Colonial	2		

IS – Select for Billing

Select Orders for Billing

Oper: FST Refresh Select All Print All

Ready to Select Manually Select Ready to Invoice Invoiced

Order #	View	Edit	Date	OK to Select Status	Item Total	Bill-to Name	PO#	Type	Customer Number
129			04/10/19		\$211,921.75	Rose O'Brien		REGULAR	
181			07/27/19		\$-24.95	Carl Sanders	1234567	CR MEMO	
182			03/27/19	Purch Need Recv	\$25.94	Manfred Morris		REGULAR	
184			07/27/19		\$0.00	Location 003	65	Transfer	
194			08/02/19	Needs Picking	\$225.95	Betty Hines		REGULAR	
195			08/02/19	Purch Need Recv	\$43.90	Manfred Morris		REGULAR	
196			04/02/19	Purch Need Recv	\$267.90	Carl Sanders		REGULAR	
197			03/24/19		\$-124.75	Carl Sanders	Return	CR MEMO	
200			02/27/19		\$3,739.20	Carl Sanders		REGULAR	
201			04/08/19		\$0.00	Columbus Auto Parts	SV-34432	REGULAR	
203			07/21/19		\$-124.75	Carl Sanders		CR MEMO	
223			06/04/19		\$0.00	Carl Sanders	123123422	REGULAR	
224			06/04/19		\$0.00	Carl Sanders		REGULAR	
229			06/13/19		\$48.50	Carl Sanders		REGULAR	
234			06/20/19		\$25.95	Carl Sanders		REGULAR	
235			06/20/19		\$188.15	Carl Sanders		REGULAR	
237			06/20/19		\$-25.95	Carl Sanders		CR MEMO	
241			06/21/19		\$887.96	Carl Sanders	242343	REGULAR	
243			04/26/19	Link SV Order	\$0.00	Carl Sanders		REGULAR	
244			04/27/19	Link SV Order	\$2,035.95	Carl Sanders		REGULAR	
246			05/28/19		\$84.35	Carl Sanders		REGULAR	
250			06/15/19		\$51.90	Carl Sanders		REGULAR	

Total Records: 165

Order Number: 129
Location: 001
Type: R
Order Date: 04/10/19
Ship Date: 00/00/00
Customer: 6 - Rose O'Brien
 3283 Vineville Avenue
 Macon, GA 31204

PO #:
Salesperson: BTR
Total Price: 211,921.75
Line Items: 15

Item	Description	Qty
Office System	Complete Office System	1.000
*CED8000	CEDAR Special Job	1.000
100-TAN	747 Swingline Desk Stapler	1.000
100	747 Swingline Desk Stapler	1.000
Office System	Complete Office System	13.000
Office System	Complete Office System	55.000

AR – Enter Payment (Cash Rec)

Payment Received
Ext Data

Refresh
Advanced Edit
Print Receipt
Post
Finish

Customer No

Carl Sanders
1032 Opelika Road

Add33333
Atlanta, AL 36830

Pay Type

Document Nbr

Reference

Date

Pay Amount

Deposit ID

Customer Info

Carl Sanders

1032 Opelika Road

Add33333
Atlanta, AL 36830

Contact Carl Sanders

Phone 338-821-2342

E-Mail CARL@SANDERS.COM

Salesperson: BTR

Account Balance: \$-28,891.19

Last Payment 09/02/19

Svc Orders 46

Sales Orders 169

Oper: ARC

Apply To #	Amount Paid	Amt Due	Due Date	Age Days	Disc Amt	Reference
376	\$567.00	\$689.34	08/27/19	0	\$0.00	Payment - Check # 22334

Total Records: 1

Enter Payments
Pending (Unposted)
Documentation

AP – Enter Bills (Payments)

QuickScreens Menu
AP - Enter Bills ✖

A/P Trx List
Trx Details

Trx: 303
(Cont.)
Ext Data
Notes

Refresh
 Full Edit
 Delete Trx
 Exit

Type Invoice - Pay Later

Vendor No 1

Pay Address Halls Warehouse Supply
2323 Court Street

Montgomery, AL 36821

Document # 12345

P/O # (No PO)

Date 05/02/21

Terms Net 30

Due Date 06/01/21

Reference Invc:12345

Amount 444.00

⚠
Distributions don't balance

Expense Distributions: (Remaining: 444.00)

Expense Acct (All Accts) Amount Reference/Memo

(not specified)

Line#	Account	Amount	Reference
✖	1 Cash in Bank - 1020-000	.00	Invc:12345
✖	2 Credit Card Cash - Visa -	.00	Invc:12345
✖	3 Retained Earnings - 304	.00	Invc:12345

Total Records: 3

Vendor Info ➤

Halls Warehouse Supply

2323 Court Street

Montgomery, AL 36821

Terms: Net 30

Payment Status:

Open Purchase Orders: 13

Account Balance: \$9,420.33

Credit Limit: \$0

Past Due \$0.00

(as of 09/20/20):

PO's Not Received Amt: \$13,442.92

YTD Purchases: \$0.00

Oper: AP

Enter Bills
CheckWrite
Pending (Unposted)
Open (Unpaid)
Recurring Trx
Documentation

PO – Planner Portal

QuickScreens Menu
IS - PO Planner Portal

Current Workfile
Item 003-00000023891 Analysis

Item: 003-00000023891 Loc: 002 Aspire ONE 10.1Decal -Airlines


Refresh Exit

Item: 003-00000023891
Aspire ONE 10.1Decal -Airlines

Location: 002

Category: OS

Primary Vendor: 20
Office Supply Central



Available Vendors for Item 003-00000023891 (Sugg Qty: 5.000 EA)

Vendor #	In Workfile	U/M	Last Cost	Lead Time	Buyer	W/F?
20	5.000	EA	.00000	0	PO	Y

Total Records: 1

Stock File Quantities:	Workfile Quantities:	PO Qty	Stock Qty
On Hand .000 EA	Suggested 5.000 EA	5.000 EA	4.500 EA
Committed .000 EA	For Stock - Loc 002 5.000 EA	5.000 EA	5.000 EA
On BO .000 EA	--Total - Loc 002 5.000 EA		5.000 EA
Available .000 EA	For Stock - All Locs 10.000 EA		10.000 EA
On POs .000 EA	--Total - All Locs 10.000 EA		10.000 EA

Vendor#	Purch For	Workfile Qty	U/M	Unit Cost	Buyer	Seq#
20	Loc: 002	5.000	EA	925.95000	PO	0

Vendor 20 Info for Item 003-00000023891

Vendor Name: Office Supply Central

Vendor Part #: ABC-1000

Buyer: PO DEFAULT PO BUYER

Minimum Order \$: \$1,000.000 (Weight: .000)

Maximum Order \$: \$,000

Last PO: 03/20/21

Last Cost: \$.00000

Lead Time: 0 Days

Freight Terms: FREIGHT PAID

Comments:

Item
Purchases
Activity
Trend
Controls


Main
Catalog
Contact
Purchases

PO – Approval Portal

QuickScreens Menu JC - Job Analysis IS - Select Orders **IS - PO Approval Portal**

PO Approval Portal

Refresh Help



DEFAULT PO BUYER (PO)

- Pending POs
 - My Pending POs**
 - All Buyers
 - By Buyer
 - ALL
 - BB
 - PO
- Rejected POs
 - My Rejected POs
 - All Buyers
 - By Buyer
 - ALL
 - BB
 - PO

POs to Approve - Buyer PO

Refresh Page

Click on to Approve, click on to Reject, or click on the first column to reset the status to Pending.

	Yes	No	PO #	Amount	Vendor Name	Buyer	Buyer Name
?			97	\$6,597.60	Office Supply Central	PO	DEFAULT PO BUYER
				\$6,597.60			
Total Records: 1							

PO #: 97 Office Supply Central \$6,597.60

PO Header PO Lines (3) Notes Ext Data


Refresh Edit Approve Reject Cancel

PO # 97
Date 07/20/20
Vendor Office Supply Central (20)
Terms N30
Ship Date 00/00/00 (Last Recv'd: 00/00/00)
Ship To Main Warehouse
 5 Hinson Lane
 Auburn, AL 36830
Ship Via
Contact Beth Brown office@supply.net
Location 001
Type R
Buyer PO (DEFAULT PO BUYER)
Comment
Print Date 00/00/00
Status **PENDING Approval**
Total Cost \$6,597.60 (Invoiced: \$.00)
Total Weight 1,067.500

TW – Collections

QuickScreens Menu
TW - Collections Portal

Collections



Refresh Page
Find Customer:

By Number | By Name
By Key Word

- Collections Overview
- Collection Alerts
- Scheduled Followups
- Past Due Only**
- Overdue Commitments
- All Customers
- Management Review
- Past Due Status

List
Collections
Customer View

Refresh E-Mail

Carl Sanders (1)
1032 Opelika Road
Suite 100
Atlanta, AL 36830
Contact: Carl Sanders @ 338-821-2342

Account Balance: \$-30,166.81

Past Due (10/30/20): \$6,024.48

Credit Limit/Rating: \$0 / BBB

Terms: 2

Last Payment Date: 10/06/20

Statement

Invoices

Credit

Aging

Payment

Last collection task:
Chuck Brems -Sales Opportunity
06/23/22 3:32PM for DEMO by DEMO
Need VIO

Open Items
Collection Alerts (0)
Add a Task
Collection Tasks
Recent Activity
Enter Payment

Open Item List

Document	Due Date	Balance Due	Commit Date	Called Date	Document Date	Age Days	Orig
316	03/01/21	\$-26.20	07/02/22	06/28/22	02/02/21	0	1
376	02/27/21	\$12.83			01/28/21	0	2
378	02/27/21	\$225.10	05/22/21	05/19/21	01/28/21	0	2
381	02/27/21	\$0.00			01/28/21	0	2
390	08/16/22	\$11.97	10/09/20	10/07/20	07/17/22	0	2
391	11/27/22	\$747.23			10/28/22	0	2
393	12/23/20	\$246.78			11/24/20	66	2
395	12/23/20	\$29.87			11/24/20	66	2
396	12/23/20	\$203.70			11/24/20	66	2
398	12/02/20	\$101.85			11/03/20	87	2
402	01/14/21	\$25.89			12/14/20	44	2
403	01/14/21	\$203.70			12/14/20	44	2
405	09/06/20	\$74.65			08/04/20	174	2
123456789		\$47.30	07/24/22	07/16/22	02/15/22	16572	S
123	01/28/21	\$-500.00			01/28/21	30	C

Document: 316 (ORD:191)

Due Date: 03/01/21 Aged Days: 0

Balance: -26.20 [View Invoice Details](#) [Email Invoice](#)

Commit: 07/02/22 as of 06/28/22

New Note:

Update Info

Notes: NOTE: 09/28/14 11:48 Collections by DEMO
Sending check

Total Records: 22

TW – CRM / Opportunities

QuickScreens Menu | TW - CRM

SouthWare CRM | DEMO | 02/23/21 | CRM Mode: Sales | "Helping You Succeed"

Home | Accounts | Contacts | Tasks | **Opportunities** | Reports | Dashboards | Projects | Cases | Solutions

Opportunities << | Opportunity List

Opportunities to Show: Recent (30 Days) | Recent (90 Days) | No Activity 30 Days | No Activity 90 Days | All Open
 (🚩) = Probability > 50%

All Open Opportunities

Task ID	Reference	Stage	Due Date	Type	Name	Assign	%Likely	Potential Value	%Adj Value	Competitor 1
144	Quote a Sale	Reviewing Proposal	05/21/22	P	Technical Computer Center	DEMO	10.00	\$10,000.00	\$1,000.00	DELL
147	Getting ready to close	Near Close	11/05/20	C	Johnson Lumber Company	DEMO	65.00	\$15,000.00	\$9,750.00	DELL
149	Cold Call	New Lead	04/17/22	P	Kings Chiropractic Center	DEMO	5.00	\$6,000.00	\$300.00	
152	Looking for new Widget	New Lead	02/28/22	C	Carl Sanders	DEMO	65.00	\$10,000.00	\$6,500.00	TIGER
153	New Service Contract	Qualified Lead	05/23/22	C	Carl Sanders	DEMO	50.00	\$3,500.00	\$1,750.00	DELL
154	Need new Copier	Reviewing Proposal	03/27/22	C	Carl Sanders	DEMO	75.00	\$7,500.00	\$5,625.00	IBM
155	need new Printer	New Lead	06/23/22	C	Carl Sanders	DEMO	25.00	\$10,000.00	\$2,500.00	DELL
256	Unknown	New Lead	01/27/22	C	Carl Sanders	DEMO	.00	\$0.00	\$0.00	
285	Test Opp	Made Proposal	12/04/21	V	Central Alabama Power Company	DEMO	5.00	\$500.00	\$25.00	NEWEGG
287	Need VIO	New Lead	06/23/22	C	Carl Sanders	DEMO	.00	\$2,500.00	\$0.00	
303	Packer	New Lead		C	Carl Sanders	DEMO	10.00	\$50,000.00	\$5,000.00	
306	The Johnson Job	New Lead	11/03/20	C	Carl Sanders	DEMO	30.00	\$0.00	\$0.00	DELL
								\$155,999.00	\$43,799.75	
Total Records: 27										

Refresh Page

Find:

Name | Reference

- Open Opportunities
- New Opportunity
- New Prospect
- Forecast
- Weighted Amts
- Estimated Amts
- Opportunity History
- Competitors
- Close Ratio

Mobile Tech & Sales Portals

QuickScreens Menu JC - Job Analysis **SV - Mobile Tech Portal**

S/O List - Bill (5) S/O#: 00100000093 Today's Map Time Reporting


Refresh Options Return to List

Refresh Page

I acknowledge that this work was done:
Type your name

Bill

Draw your signature Clear



Submit Signature

Standard Options

- General Info
- Parts/Labor
- Signature
- Payment
- Text
- Finish

More Options

Tech Management & Mapping

QuickScreens Menu JC - Job Analysis SV - Service Manager Portal

Service Manager Scheduler Service Orders Technicians **Mapping**

Status Info Launch Menu

SouthWare

- Refresh Page
- Open SO Activity
- Related Inquiries
- Scheduler Board**
- Reports
- Service Order Entry
- Print Service Invoices
- Svc Ord Processing
- Svc Inv Processing
- New Task
- All Reports
- FYI Analysis
- Operator Info
- Help

Map

Date: Loc: All Tech: All Territory: All Dispatch: All Show: Tech Assigned Unassigned Update As of: 02/23/21 17:43:46

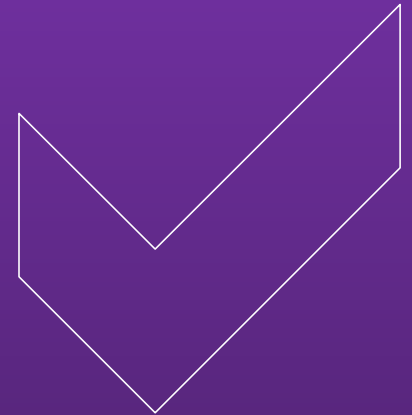
The map displays the United States with various cities and states labeled. A callout box is visible over the Auburn, AL area, providing details for a specific service order.

SO#: 0019900006
Carl Sanders
1032 Opelika Rd
Auburn, AL
Tech: Joe
Sched: 04/25/21 1255

©2021 MapQuest, © Mapbox, © OpenStreetMap | Terms

Transaction Portals - Examples

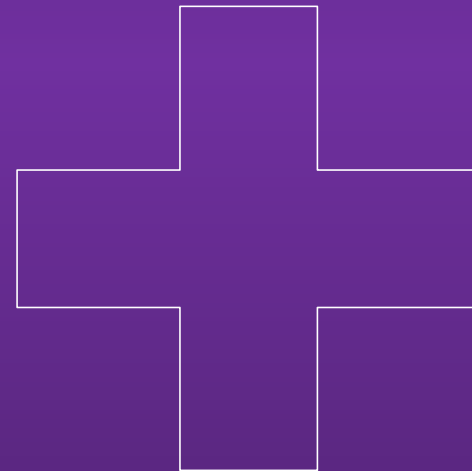
- AR - Collections (TaskWise)
- AR - Cash Receipts
- CF - Bank Deposits
- AP - Invoice Processing
- IS - Enter Order
- IS – Select for Billing Portal
- IS – Pricing Review
- IS – PO Approval Portal
- IS – PO Planning Portal
- IS – Point-of-Sale
- SV – Enter Service Orders
- Mobile Tablet
 - Sales Portal
 - Order Entry
 - Service Tech



Custom Portals

Personalize Your Portals


- Add New Fields
- Add New Links
- Add or Modify Web Grids
- Add or Modify Portals
- Add or Modify Processes



Custom Job Monitoring

QuickScreens Menu
JC - Job Analysis x

Jobs <<




Refresh Page

- Job Summary
- Open Jobs
- Late Jobs
- Over Budget
- Closed Jobs

Job List
Job View

Master Job	AVELON
Job Name	1762 Hall Avenue
Customer	1 Carl Sanders
Description	3000 Sq. Foot Home Plan # 123449383472 3rd House on the left when entering Avelon Subdivision
Start Date	Estimated: 07/01/20 Actual: 07/26/20
Complete Date	Estimated: 01/30/21 Actual: 00/00/00



Wed Feb 10 09:13:32 2021

Job Header
Job Details
Trx History

Status	IN PROGRSS
# Chg Orders	0
# Payrolls	3
Project Mgr	John Harris

JTD Labor Cost	\$1,393.50
JTD Material Cost	\$3,098.15
JTD Other Cost	\$500.00
JTD Sub-Contractor Cost	\$.00
JTD Indirect Cost	\$.00
JTD Total Cost	\$4,991.65

JTD Amount Billed	\$5,701.28
JTD Amount Paid	\$.00

Custom E-Commerce Manager

E-Commerce Manager <<												
Order List												
Last 7 Days		03/13/19	thru	03/20/19	Submit			Facility ID:		Partner ID:		Submit
Order #	Date	Ship Date	Land_CSV_PO#	Customer Number	Type	Status	TOTAL PRICE	Order Type	Facility ID	Facility Name	Partner ID	
89246	03/13/19	03/13/19	49093	212	REGULAR	S	\$30.76	R	SN4F1		76969	
89247	03/13/19	03/13/19	49094	212	REGULAR	S	\$30.76	R	SN4F1		76969	
89248	03/13/19	03/13/19	49114	212	REGULAR	S	\$33.29	R	SN359		65942	
89257	03/13/19		49197	212	REGULAR		\$34.33	R	SN048		53355	
89260	03/13/19		49165	212	REGULAR		\$39.84	R	SN008		11695	
89261	03/13/19		49149	212	REGULAR		\$20.56	R	SN053		92808	
89262	03/13/19		49147	212	REGULAR		\$174.05	R	PH050		14976	
89263	03/13/19		49150	212	REGULAR		\$32.38	R	SN053		83741	
89264	03/13/19	03/13/19	49144	212	REGULAR	S	\$15.38	R	PH049		90355	
89265	03/13/19		49136	212	REGULAR		\$27.42	R	SN401		34294	
89266	03/13/19		49137	212	REGULAR		\$66.58	R	SN401		34244	
89267	03/13/19	03/13/19	49213	212	REGULAR		\$75.00	R	MG397		95400	
89268	03/13/19		49155	212	REGULAR		\$33.29	R	SN035		23158	
89269	03/13/19		49196	212	REGULAR		\$94.49	R	SN363		71008	
89272	03/13/19		49181	212	REGULAR		\$64.17	R	SN3C8		97522	
89273	03/13/19		49148	212	REGULAR		\$51.97	R	PH050		15001	
89274	03/13/19		49138	212	REGULAR		\$63.24	R	SN037		96996	
89275	03/13/19	03/13/19	49145	212	REGULAR	S	\$15.38	R	PH049		91563	
89276	03/13/19		49179	212	REGULAR		\$65.67	R	SN058		66665	
89277	03/13/19		49203	212	REGULAR		\$72.37	R	SN504		96986	
89278	03/13/19		49158	212	REGULAR		\$66.58	R	SN3C3		96572	
89279	03/13/19		49159	212	REGULAR		\$33.29	R	SN3C3		95481	
89282	03/13/19		49173	212	REGULAR		\$23.00	R	SN036		13901	
							\$9,853.48					
Total Records: 167												

Refresh Page

Find NetLink User
Enter Partner ID, Partner Name,
or Email address:

Search

- View Open Orders
- View Invoices
- View Orders by Product
- Facility List
- Partner List

Custom Service Return Portal

Options

RA / Task Number

Service Return Items

Task #:253973
Customer: MAYO (1780)
 Access Task

	Line	Item	Description & Notes	Serial/Lot#	Dates	Qty Exp	Qty Rtn	
 	10	077.0571	DISP. OVERFLOW PROTECTION/ BACTERIA FILTER W/MEDELA CONNECTIONS (20340-100) Notes: test note1 test note2	B02400175725	Exp:12/25/13 Rtn:12/11/13 Out:00/00/00	10	8	Access SO Print Label Svc Started Bench B
 	20	20150-236	APPLICATOR WITH COAG SUCTI OUTER DIAMETER (O.D) 6mm X LENGTH 65mm Notes: TEST	W0189681	Exp:12/25/13 Rtn:12/11/13 Out:00/00/00	4	4	Access SO Print Label
 	30	077.0571	DISP. OVERFLOW PROTECTION/ BACTERIA FILTER W/MEDELA CONNECTIONS (20340-100)	B02400175723	Exp:12/25/13 Rtn:12/11/13 Out:00/00/00	2	1	Access SO Print Label
 	50	077.0571	DISP. OVERFLOW PROTECTION/ BACTERIA FILTER W/MEDELA CONNECTIONS (20340-100)	B02400175723	Exp:12/25/13 Rtn:01/16/14 Out:00/00/00	10	5	Access SO Print Label
 	60	20150-261	HYBRID KNIFE, 2.2mm X LENGTH 2.2m	W3180402	Exp:12/25/13 Rtn:12/11/13 Out:00/00/00	25	13	Access SO Print Label
 	70	20150-261	HYBRID KNIFE, 2.2mm X LENGTH 2.2m	W3180402	Exp:12/25/13 Rtn:03/07/14 Out:00/00/00	12	11	Access SO Print Label

Returns Portal

- Active Return Items
- Pending Returns
- Wait Service
- On Service Order
- Created By EXERVEDM
- Other Item Filters
- Add Item
- Add From EQ Invoice
- Add From Sales Invoice
- Create Return Doc
- Create Return Doc for Date

Custom Service Expense Billing

Select SO 00100155220 Expense for Service Billing

	Vendor	TRANS NO	LINE NO	DESCRIPTION	View	RECEIPT-DATE	DIST AMOUNT	CATEGORY
➔	1119	6739	10	HA. 155220. Ameris-Waycross. 3/12-3/13. 1 Night.		03/14/19	\$113.10	Exp - Lodging
➔	1643	6745	10	HA. 155220. Ameris-Waycross. 3/12-3/13. 1 Night.		03/18/19	\$25.00	Exp - Per Diem
➔	1643	6765	10	HA. 155220. Ameris-waycross. 3/12-3/13. 1 night.		03/27/19	\$25.00	Exp - Per Diem

⏪
Total Records: 3

Valdosta Conference Center
 Mar 12, 2019 → Mar 13, 2019
 Confirmation Number: 26183452

Date / Description	Amount (USD)
Mar-12-2019	
Depend Transfer at Check In	113.10
*Guest Room	81.00
State Sales Tax	7.52
Total Occupancy Fee	9.58
Georgia State Hotel Motel Tax	5.00

Terms and Conditions:
 The electronic version of your final hotel bill will be available within 72 hours of your check-out time. The bill will reflect any changes made through 11:59 PM on your check-out date. Adjustments after that time may not be shown. The hotel will be official source of all charges and credits to your account and will only issue these records. Most hotels are independently owned and/or operated. Hotel bills will be available for up to 8 months following your stay. You will continue to receive a paper copy of your bill upon check-out.

Send Copy to Email
 Houston1111@obc-t.com

Custom Service Billing Summary

Enter SO 00100155147 Billing Details for Service Billing

Customer Comments

mag lock door issue per JMP

Technician Notes

New door were installed and no magnets for door contact. Replced and tested ok.

Invoice Notes

Parts Notes

Magnetic contacts,

Delete Inv Notes
 Copy Tech Notes
 Reset Parts Notes

Contract Billing Notes

Battery Coverage

No

Service Date

02/27/19

Ticket Type

Service Ticket

SA Override

Booked Date

00/00/00

Gross Margin

.00

Labor/Trips	Invoiced	Parts	Cost	Price	Markup
Onsite Actual/Rec Hours	1.33/ 1.50	Inventory Parts	\$ 53.00	\$.00	.00
Std Trip Hrs/Miles	1.75 .00/ 75	Expense Parts	\$.00	\$.00	.00
Trips	1	Total Parts	\$ 53.00	\$.00	.00
Std Hrly Rate/Miles	\$ 83.00/\$.65	Parts Covered (per contract)		N	
Labor Covered (per contract)	N	Rec Parts Price		\$.00	
Invoiced Hrs/Miles	0.00 / 0.00	Actual Parts Charged		.00	Infinity
Invoiced Hrs/Miles \$	0.00 / 0.00				

Reset
Contract
Recommend
Cancel
Submit

Customer Inventory Management

+Show Mobile Options Toolbar

[Start](#)
[My Order Approvals](#)
[My Inventory Uploads](#)
[My Inventory Settings](#)
[Instructions/Template](#)
[FAQ/Help](#)

Work File List

[Refresh](#)
[Approve All](#)
[Order Approved Items](#)
[Order All](#)

	CUST NBR	VIEW	CUSTOMER NAME	SW STOCK NBR	SW STOCK LOC	STOCK DESC1	SHIP TO	SHIP TO STATE	CUST STOCK NBR	CUST PRICE
	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	161113		DENISE TESTING	101137	001	HN WHITE PEACH HIBISCUS 16			W-PEACH	
	161113		DENISE TESTING	101040	001	ACCELERATOR K 8.5OZ	B1	MO		
	161113		DENISE TESTING	101137	001	HN WHITE PEACH HIBISCUS 16	B1	MO	W-PEACH	

Customer Inventory Management

Customer Inventory << Customer List Customer Details

Status Info

Launch Menu

Customer Inventory

- Customers(Inv Managed)
- Cust Inventory Setup
- Cust Work Files
- Cust Inventory Uploads
- Cust Instructions/Template
- Cust Portal Login
- Maintenace Programs

Customer Inventory << Customer Number 161113 DENISE TESTING

Customer View

Inventory List Inventory Details

Refresh Full Edit

Southware Stock # 101127

Stock Description FEROCIOUS PKT

Ship To

Shipping Address

Location 001

Customer Stock # FERO

Customer # 161113

Customer Name DENISE TESTING

WK Gen Date 00/00/00

WK Gen Time 0

Stock Pricing	Minimum	Maximum
Previous	.000	.000
Current	1.000	10.000

Submit

So... What Can You Do?

- Establish Primary User Navigation Using Commonly Understood Browser
- Combine Data from Various Sources onto Single Portal
- Extensive Inquiry & Reporting
- User Friendly Transaction Processing
- Create Customized Data Entry & Transactions Portals
- Remote Browser Based Access to Your SouthWare Solution

- What Can You Imagine?

Questions





Be a Southware Genius