

## **Split Schedules**

#### • Released – SO Portal Split Schedule – July 2020

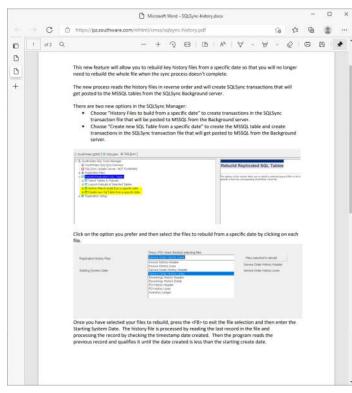
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Contents SP - SPC Scheduleg Prefet   International SP - SPC Scheduleg Prefet   Mark Newto Colors Technical Colors SPC Color Colors SP - SPC Scheduleg Prefet   Scheduleg Technical Colors SPC Colors   Dil Pref   Mich Tokat   Did Scheduleg Technical Colors   Dil Pref   Mich Tokat   Did Scheduleg Colors   Dil Pref   Dil Scheduleg Colors   Dil Pref   Dil Pref   Did Scheduleg Colors   Dil Pref   Dil Scheduleg Colors   Dil Pref   Dil Pref   Dil Scheduleg   Dil Scheduleg	Stores PHONE CALI Problem Parts Represent Cospected () PO # Type General () Type General () Turittory Respect Turittory Respect	able babe       able babe

## Split Schedules, 2

225.0	H 🗆 🗉 🗉 🖌		Scheduler Board (Bre	rakout)				
4	0							
		Status:E						
		ity Health Care	Type:GEN Prob:PRT Terr:MI					
tact:Grady 5			1/09/19 13:50 Cover:REN Pri:0					
Sched Start			08:30	Ł		1		
Responsible		Joe						
of Est Hrs		2.17		Total of Sc	heduled Hours		2.17	
Assignments								
Est hrs	10.000	Technician	Sched Date 10/21/21	Sched Time			Description	
	10e							
<u>.</u>	Joe		10/22/21	08.30 08.30	1 st trip 2nd trip			
2:								

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

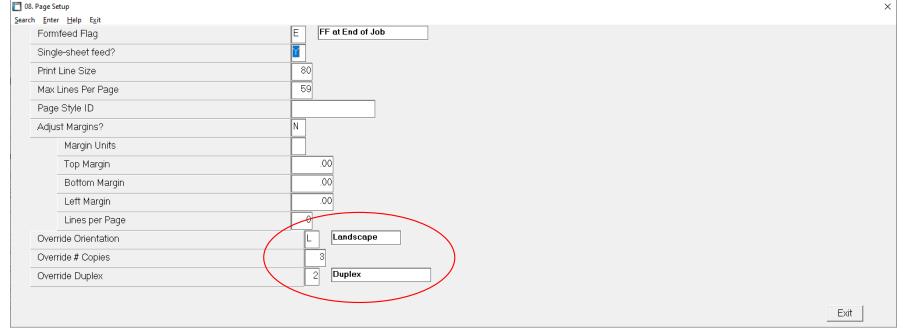
# SQLSync – Rebuild from a specific date



## **Forms – 2 serial numbers/line**

Bill To:	150	5 Victo	Auto Parts ory Boulevard GA 30050	Ship To:	404-528-4851 Columbus Aut 1505 Victory F Columbus GA	Boulevard Learn More 1
Invoice# Invoice Dt		rder# rder E	Customer# Customer P.O.#	Te	rms	Salesperson
57 11/30/19	78		350	Pr	x 2/5 Due 20	UPS-Ground/Res 2
Units		U/M	Item Description	Disc	Unit Price	Amount
	2	EA	<ul> <li>****** DUPLICATE COPY ******</li> <li>305</li> <li>Canon 3311 Personal Typewriter</li> <li>Serial Numbers:</li> <li>262 263</li> </ul>		200.00	400.00
	1	EA	760-76F		800.00	800.00

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



## **Order Approval Portal**

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QuickScree		15	- Approv	e Orders 😿				8			
to .	Approve, (		🔦 to Viev e All 🛛 🎯								
	erresn 😜			пер							
Orde	1		Date	Amount	Oper	Order Type	Cust #	Name	Sis Loc #	Order Number: 198	
		ſ				2		·		Location: 001 Type: R	
	198		10/24/19	\$115.	75 INV	R	1	Carl Sanders	BTR 001	Order Date: 10/24/19	
	244	۹. :	10/20/21	\$9,980.0	OO OE	R	1	Carl Sanders	BTR 001	Ship Date:         00/00/00           Customer:         1 - Carl Sanders	
										123 Magnolia Avenue	
										Auburn, AL 36830	
										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
		-		\$10,095.7	5		1	3	15 31		

## **Override standard grids**

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ader !!ems   Payment/Totals			2/31/19 \$ Open: 51,378.99			a, 🗞 🗖	
Order# 24	Carl Sande	ers	]				POS
Type Regular Order# Ln# Stock # Shipped	Description 1	Decer	ption 2	Description 3	Qty Ordered	Unit Price	Extend Price
	line Desk Stapler	7 1/4" long	piloti z	Description o	1.000	19.96000	19
	erlock Sport Shirt	8oz 100% Cotton	BLUE/M		3.000	25.31800	75.
	erlock Sport Shirt	8oz 100% Cotton	RED/M		10.000	25.31800	
	erlock Sport Shirt	8oz 100% Cotton	RED/S		5.000	25.31800	126
	Margin 19. Ty	t 36.50 56.26 % H/C		Invoice To Margin \$ 24. Quantity	tal 222.50 267.63		
ost 208.05		56.26 %		Margin \$			
Cost         208.05           18. Line #         Image: Cost of the second		56.26 % H/C		Margin \$ 24. Quantity 25. Unit Price			
Cost         208.05           18. Line #         Image: Cost of the second	19. Ty	56.26 % H/C		Margin \$       24. Quantity       25. Unit Price       26. Unit Cost       27. Qty Shipped       28. Qty B/O			
Cost         208.05           18. Line #         Image: Cost of the second		56.26 % H/C		Margin \$ 24. Quantity 25. Unit Price 26. Unit Cost 27. Qty Shipped			Fi <u>n</u> ish
Cost 203.05  18. Line #  20. Item #  21. Desc  22. U/M	19. Ty	56.26 % H/C		Margin \$       24. Quantity       25. Unit Price       26. Unit Cost       27. Qty Shipped       28. Qty B/O			Finish Exit
Cost         208.05           18. Line #	19. Ty	56.26 % H/C		Margin \$       24. Quantity       25. Unit Price       26. Unit Cost       27. Qty Shipped       28. Qty B/O			
Xost     208.05       18. Line #     Image: Constraint of the second se	19. Ty	56.26 % H/C		Margin \$       24. Quantity       25. Unit Price       26. Unit Cost       27. Qty Shipped       28. Qty B/O			Exit

# Use variables as selection criteria

RM-06 SouthWare Excellence Series (DM\) Demo Company					– 🗆 X
<u>File Edit Approx Search Next Previous Enter Options Breakout Link Help</u>					
* 2 🔍 🗖 🖦 🍓 🛛	For Your Information (RM)				
Category rs07	15	MYSALES	<b>v</b>		
➢ Parameters ☐ GridView					
Variable information		0 Output Limit (RS07 -	- Sales Order (header))		
Fields to Retrieve         Order Number       (*Alt)         CONUMBER       (*Alt)         PO Number       (*Alt)         Order Entry Type       (*Alt)         Total Price       (*Alt)         Total Discount       Salesperson         Logon Salesperson       Logon Salesperson		Parameters (Add a range) (Add a range) (Add a selection rule)	)		
Custom Layout          Advanced Editing         Qopy to Another Format         Select DoWork IDs		1(Add a sort)			
			DEMO	10/20/21	🥏 4 8701PR
Web Menu ReportMate Report Portal					

## **Notes + XD for Inventory Adjust...**

IS-06-01-01 SouthWare Excellence Series (DM\) Demo Company			— 🗆 X
Eile Edit Approx Search Next Previous Enter Options Breakout Link Help			
	Enter / Edit Inventory Transactions		
	8		
*1. Transaction # 2. G/L Post Date 3. Date 4. Type 5. Stock Number 6. Location Transfer To Loc	11           10/20/21           A           Adjustment           100           001           N/A	747 Swingline Desk Stapler	Oper INV EA
7. Tracking Number 8. Job ID	N/A		
Cost Code	N/A	LI/M EA	
9. Quantity	48.000		
10. Cost	10.950 MNT	Extended: 525.600 Management Adjustment	
11. Reason Code  12. G/L Account #	6140-000	Repair and Maintenance	
13. Reference	0140-000		
14. Storage ID			
		# to change	QK Qancel      Notes     10/20/21     Notes
Web Menu Inventory Transaction Entry			

#### **Inventory Ledger Entries now in Activity History**

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tory Manager 🥢	Stock	Stock Details							
View	vs/Activity «	Stock Number 100 001 747 Swingline	Desk Stapler						
in the second		Activity List							
747 St	wingline Desk Stapler	All Dates V 01/01/1900 thru 12/31/2099 Submit							
SouthWare	Charle Manuel	The second secon							
	Stock Edit	a 🖉 📫 📓 🔓 🐘 🥥							
	Open	Reference	Activity Type	Activity Date	Activity Time	Activity Source File	Qty	Extended Cost	Extended Price 5
Go	History								
d Guardh	Tracking records	Whs Trx #: 341 Source: Key: 22	Whs Trx	07/11/19		1/69		50.00	\$0.00
		With 118 # : 348 Source: Key: 22 Svc Order #: 00100000074 Line #: 20 Type: Invent	Service Order	09/18/19		SV06	1.0		
	and the second	Order #: 42 Line #: 10 Type: Inventory	Sales Order	09/23/19		RS08	4.0		
Top Selling Items	All biotos	P/O #: 34 Line #: 40 Type:	Purchase Order	09/30/19		IV26	5.0		
	Extended Data	Vendor Return #: 0000000011 Line #: 20	Vendor Return	10/24/19		RA02	1.0		
	Related Stock Info	Vendor Return #1 0000000011 Line #1 30	Vendor Return	10/24/19		RA02	1.0		
		CFA # 000000010 Customer Return Authorization	Customer Return	10/24/19		RA03	5.0		
Stock		Order #: 197 Line #: 10 Type: Return	Credit Memo	10/24/19		R508	-5.0		
Vendor		Order #: 198 Line #: 10 Tree: Inventory	Sales Order	10/24/19		RS08	2.0		
Stock Tree Mgr		Q-rate	Ledger - SALE	11/25/19	195906	1715	1.0	10 \$10.95	\$24.95
👢 Purchase Order Mgr 🧴	6	Sales	Ledger - SALE	11/26/19	154513		1.0		
Receivings History		C Receivings	Ledger - REC	12/12/19	191908	IV15	50.0	5997.50	\$0.00
Corder Fulfillment	1	P/0 #: 62 Line #: 10 Type:	Purchase Order	02/01/20	9	1706	100.0	\$10,950.00	\$0.00
Standard Reports	3	O Physical Adjustment	Ledger - PHYS	02/10/20	151229	IV15	826.0	\$9,044.70	\$0.00
All Reports Maintain Files	3	P/O #: 70 Line #: 10 Type:	Purchase Order	02/17/20	0	1/06	100.00	\$10,950.00	\$0.00
New Task		O Receivings	Ledger - REC	02/17/20	102706	1V15	1000.00	\$10,950.00	\$0.00
Operator Info	3	O Receivings	Ledger - REC	02/17/20	112233	1V15	50.0	547.50	\$0.00
Help	1	Order #: 203 Line #: 20 Type: Return	Credit Memo	02/21/20	0	RS08	-5.0	5-54.75	5-124.75
		<					6745	\$65,634.05	\$23,712.58
	_	Total Records: 102					0740	300,634.00	\$23,712.58

ZUZT SPA Digital Comerence

### **Inventory Ledger Entries now in Activity History**

Sudhvise Web Meni	MA) Demo Company Jaint Set-Up Tools Options Help			- 0
Outdowns Henny       Image: Control of State State         Vextory Manage: State       Stock Number         Vextory Manage: State       Stock Number         Vextory Manage: Stock Number       Adivity Details         Vextory Manage: Stock Number       100         Vextory Manage: Stock Number       100         Stock Number       100         Open       Location         Open       Location         Vextory Manage: Stock Number       100         Location       001         Date/Time       11/24/19         Trocking records       100         Costomer Alvis       Notif Cost         Records Read       100/000         Date/Time       11/24/19         Top Selling Terms       100         Costomer Alvis       Pro Date         Pro Date       000/000         Rec Ship Date       000/000         Operator       INV         Receivings Infla       11/24/19         Stock Tee Mar       11/24/19         Stock Tee Mar       11/24/19         Receivings Infla       11/24/19         Receivings Infla       11/24/19         Receivings Infla       11/24/19         Receivings Infla	🗒 🗃 🎯 😐 South	Ware Web Menu		
Suck       Rock Details         wentory Manager       Suck         Rock Manuber       Stock Number         Stock View       Stock Number         Stock View       Stock View         Stock View       Stock Kumber         Stock View       Stock Kumber         Stock View       Date/Time         Vieword Search       11/26/19         Totaking records       Totaking records         Totaking records       Reference         Open Offer Alibing       Networds         Records       Networds         Records       Networds         Records       Networds         Records       Networds         Records       Networds         Stock Item Note       Networds         Open Offer Alibings       Reference         PO Date       11/26/19         Records       Networds         Records <td< th=""><th>E 🕘 🖀 Laun</th><th>ch .</th><th></th><th><u>نه</u></th></td<>	E 🕘 🖀 Laun	ch .		<u>نه</u>
Views/Activity       Stock Number       Total         Views/Activity       Stock Number       10         Views/Activity       Stock Number       100         Views/Activity       Stock Number       100         Views/Activity       Stock Number       100         Stock Number       100       100         Stock Number       100       100         Stock Number       100       102         Views/Activity       Views/Activity       Views/Activity         Views/Activity       Stock Number       100         Stock Number       100       100         Views/Activity       Tracking records       Views/Activity         Views/Activity       Tracking records       11/26/19         Views/Activity       Stock Number       10.95000         Stock Number       10.95000       10.95000         Tracking records       North       North         Norther Activity       Stock Item Inguiny       North         Norther Activity       Stock Item Inguiny       North         Northase Order       Northase Order       Northase Order         Nethase Order Nerg       Stock Item Inguiny       Northase Order         Nordraft Field       Stock Item Ingui				
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Ye Swindline Deck Stapler       Ype         Stock View       Stock View         Stock View       Stock Kith         Open       Stock Kith         Istant Stock       Dob         Tacking records       11/26/19         Top Seling Items       Stock Kitho         Open Order Activity       Stock Kitho         Open Order Activity       Tacking records         Probable Order Marks       Stock Kitho         Open Order Activity       Format Decimal         Open Order Activity       Reference         Pothate Order       Pothate         Tacking records       Reference         Pothate Order       Mindots         Stock Item Inquiry       Receivings Items         Vendor       Stock Item Inquiry         Stock Reports       Potate         Open Order Activity       Stock Item Inquiry         Potate Order       Mindota         Stock Reports       Format Decimal         Stock New Order       Stock Item Inquiry         Vendor Worder       Stock Item Inquiry         Stock Reports       Stock Item Inquiry         A Reports       Customer Number         Jan Vendor Wunber       Jan         Operator Infor	Artist Artist			
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dresh Page       0 0 m       - 1.000 EA         Stock Edit       0 m       00         Stock Timber       00       00         Tacking records       0 tackiton       01/26/19 15:45:13         Tacking records       Trx Date       11/26/19 15:45:13         Customer RA's       Format Decimal       3         Customer RA's       Format Decimal       0.05000         Customer RA's       Format Decimal       0.05000         Customer RA's       Format Decimal       0.000/00         Customer RA's       Format Decimal       0.05000         Customer RA's       Format Decimal       0.0000         Customer RA's       Format Decimal       10/26/19         Customer RA's       Format Decimal       10/26/19         Customer RA's       Cu	tock View	Туре	S Sales	
Stock F::       Open       Oit         Sock F::       Coit       Date/Time       Oit         Sock F::       Coit       Tracting records       Tracting records       Tracting records         Vendar RA's       Tracting records       Tracting records       Tracting records         Vendar RA's       Unit Cost       11/26/19       15:45:13         Top Selling Tems       Open       12/67       3         Vendar RA's       Unit Cost       10.95000       000         Top Selling Tems       Pop Order Activity       Stack       11/26/19         Vendar RA's       Reference       11/26/19       00/000         Tatake Order       Operator       00/00/00       00/00/00         Stack       Stack Item Inguiry       Reason Code       Inv Type Code       11/26/19         Vendor RA's       Receivings Info       00/00/00       NV       00/00/00         Stack Item Inguiry       Receivings Info       11/26/19       00/00/00         Stack Item Inguiry       Receivings Info       11/26/19       00/00/00         Stack Item Inguiry       Receivings Info       11/26/19       00/00/00         Stack Receivings History       Inv Acct No       10       00/00/00		Quantity	-1.000 EA	
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ard Search     Tracking resords     Tracking resords       Color     Yendor RA's     Format Decimal     3       Color     Vendor RA's     Format Decimal     3       Color     Vendor RA's     Format Decimal     3       Color     Vendor RA's     Hint Cost     10,05000       Color     Format Decimal     10,05000       Color     Format Decimal     11/26/19       Color     Format Decimal     11/26/19       Color     Format Decimal     11/26/19       Color     Format Decimal     00/00/00       Inquiris     Format Decimal     11/26/19       Stack     Reference     Inv       Purchase Order     Inv     Purchase Order       Vendor     Inv Proc Code     Inv       Purchase Order Mpr     G/L Post Data     11/26/19       Costorner Fulliment     Inv Acct Mo     131:010       Stack Tree Mpr     Costorner Number     1       Costorner Kaports     Inv Acct Mo     10       All Reports     Job ID     Inv       All Reports     Job ID     Inv       New Task     Cost Code     Inv Acct Mo       Deparator Info     Tro Work Order No     322				
Internal Steck     11/26/19       Open Order Activity     Vendor RA's       Open Order Activity     Vendor RA's       Open Order Activity     Extended Data       Open Order Activity     PO Date       Open Order Activity     Related Stock Info       Open Order Activity     New Task       Open Order     Oper Order       Intar Infiles     Job ID       New Task     Cost Order Number       Oper Order     Stock Order Number       Operot Info     Cost Order		Date/Time	11/26/19 15:45:13	
Let Aul Stock     Customer RA's     Unit Cost     0,95000       Top Selling Ttems     0,95000     000000       Open Order Activity     & Extended Data     Reference       R/A Listings     PO Date     0/00/00       Inquirles     Notes     0/00/00       Stock     Info     Operator     0/00/00       Resson Code     Int Ype Code     Vendor     Vendor       Vendor     Update Usage     V       Q roter Fulfilment     11/26/19       Stock Tree Ngr     Gustomer Ma's     Int Ype Code       Q roter Fulfilment     11/26/19     Int Xpe Code       Q roter Fulfilment     Int Xpe Code     Vendor       Stock Tree Ngr     Gustomer Ma's     Int Xpe Code       Q roter Fulfilment     Int Xpe Code     Int Xpe Code       Stondard Reports     Int Xpe Code     Int Xpe Code       All Reports     Gustomer Mumber     Int Xpe Code       Yendor Vendor Vendo		Trx Date	11/26/19	
Top Setting Tensis     A listing A Motes     Reference       Open Order Activity     A listing Tensis     PO Date     11/26/19       A listing Tensis     A listing Tensis     PO Date     00/00/06       Top Setting Tensis     A listing Tensis     00/00/06       A listing Tensis     A listing Tensis     00/00/06       Top Setting Tensis     00/00/06     10/06       Top Setting Tensis     00/00/06     10/06       Purchase Order     00/00/06     10/06       Purchase Order MPri     00     10/06       Corder Fulfillenct     00     10/06       Standard Reports     00 ID     00 ID       All Reports     00 ID     00 ID       New Task     00 ID     00 ID       Operator Info     00 202				
Open Order Activity     Related Data     PO Date     11/26/19       RAL Listings     Related Stock. Info     Reg Ship Date     00/00/00       Inquiries     Operator     N/V       Stock.     Stock. Info     Operator       Purchase Order     Info     Info       Stock. Tree Mgr     C/L Post Data     11/26/19       Stock. Tree Mgr     Info     C/L Post Data     11/26/19       Celvings Nistory     Info     Info     11/26/19       Stock. Tree Mgr     Info     Info     11/26/19       Celvings Nistory     Costomer Number     11/26/19       Stock. Tree Mgr     Info     Info     Info       Reservings Nistory     Costomer Number     11/26/19       Stock. Tree Mgr     Info     Info     Info       Stock. Tree Mgr     Info     Info     Info       Reservings Nistory     Costomer Number     11/26/19       Stock. Tree Mgr     Info     Info     Info			10.95000	
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Inquiries     Inquiries     Inquiries       Inquiries     Operator     INV       Stock Item Inquiry     Operator     INV       Stock Item Inquiry     Operator     INV       Stock Tee Mpr     Update Usage     Y       Stock Tee Mpr     G/L Post Data     11/26/19       Receivings Info     11/26/19       Coder Villiment     1311-010       Stock Tee Mpr     Customer Number     10       Receivings Info     11       Arreports     Customer Number     1       Maintain Files     Job ID     Job ID       New Task     Cost Code     Job ID       Operator Info     Tox No Work Order No     322				
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Q vendor     Vpdate Usage     V       Q stock Tree Mor     Receivings Info     11/26/19       Q reder Vinfilment     G/L Post Data     11/26/19       Q reder Vinfilment     Inv Acct No     1311-010       Q reder Vinfilment     Do Customer Number     10       Standard Reports     Customer Number     1       All Reports     Order Vinfilment     Do D       New Task     Cost Code     Cost Code				
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Q. Purchase Order Ngr     G/L Post Data     11/26/19       Q. Receivings History     Inv Acct No     1311-010       Q. Order Fulliment     Doc Line No     10       Standard Reports     Customer Number     1       All Reports     Vendor Number     1       Maintain Files     Job ID     Cost Code       Operator Info     Tox No Work Order No     332				
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Help		Trx No Work Order No	332	
c >	>			
Menu				DEMO

## FLEXXD

WWEBWIN SouthWare Excellence Series (DM1) Demo Company View Trans Ing Reports Periodic Maint Set-Up Tools Options Help												>
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QuickScreens Menu IS - Enter Order/Quote 📓	nowledgement 🖌 Finish											
Sanders (1)	Order Date		10/19/21			Tte	m Subi	total 🙂				\$1,367.76
Magnolia Avenue	PO#		2				(es (1)					\$68.39
urn, AL 36830	Туре		REGULAR				ight					\$.00
tact: Carl Sanders @ 334-821-2342	Salesperson		BTR-Blake Robbins				ner Cha	arges				\$.00
dit Avail: \$ .00	Terms		2 (2/10 Net 30)			Par	ments	5				\$.00
	Location		001			Ba	ance D	Due				\$1,436.15
Inder Items Billing/Payment Misc Chgs Shipping Text Recent Purchases  Corport Page  Corport HEADER   FIRSTXD  List Add	Notes Ext Data											
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## **Pricing Review Portal**

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ustomer: Carl Sanders - Aubur	rn, AL													
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Cust/Item Pricing	Customer Price Overniles Cust 1	vice Cl/R -Open Orders	Cust Pr	ice CVR -I	mates									
tem Selection		C Price List for Carl Sa	mders											
	1 - Carl Sanders	A 2 9 1		0										
	123 Magnolia Avenue Auburn, AL 36830 334-821-2342	Stock Number	Loc	Cat	Description	Quote Qty	U/M	Unit Price	Price Source	List Price	List Discount	Ext Price		
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tock No (blank for ALL)		101	001	05	Swingline Half Size Stapler		0 EA	6.50	Stock (1)	6.99000	.49			
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		196	001	OM	Wiring Set-up for Phone System	1.00	0 EA	160.00	Stock (1)	180.00000	29.00	\$160.00		
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		2251.	001	AP	Ladies' Interlock Sport Shirt	1.00	0 EA	25.318	Cat / Cust	38.95000	13.63	\$25.32		
		225L-BLK-L	001	AP	Ladies' Interlock Sport Shirt	1.00	0 EA	25.318	Cat / Cust	38,95000	13.63			
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		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		
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ewling Quotes Order 236 H ew/Edit Quote PAdd a new Quote		Occumentation	Courte Tels
2 🛯 🗱 🖡 🖌			Turn to Order
Criter # Date Item Total Salesperson Bill-to Name	Cust# #Lines Phone		
	CUSE# PLINES PRONE		Order Number: 236 Order Date: 10/20/20
234 00/25/24 \$124.75 AEM Continental LLC	999999 1		Customer: Printed Meeple (# 999999) 123 Main
234         00/25/24         \$124.75         AEM         Continental LLC           236         10/25/20         \$374.25         AEM         Printed Heeple	999999 1 999999 1		San Antonio, TX 78232
240 05/12/21 \$0.00 BTR Manfred Homs	2 4 205-749-5741		Salesperson: AEM Total Price: 374.25
			# Line Items: 1
			Item ID Description Qty To
			100 747 Swingline Desk Stagler 15,000 37 37
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#### **Locked Record Review**

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## Questions

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SouthWare





Tax compliance done right



## **Coming Up Next...**