



Be a Southware Genius

SPA2022
Southware User Conference

Welcome

Southware Partner Alliance 2022 User Conference

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We are glad you are here!

- **5th Annual Conference**

Today's Host



Nolan Breazeale

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For Help with sound, video quality, connectivity or anything else with GoToWebinar.

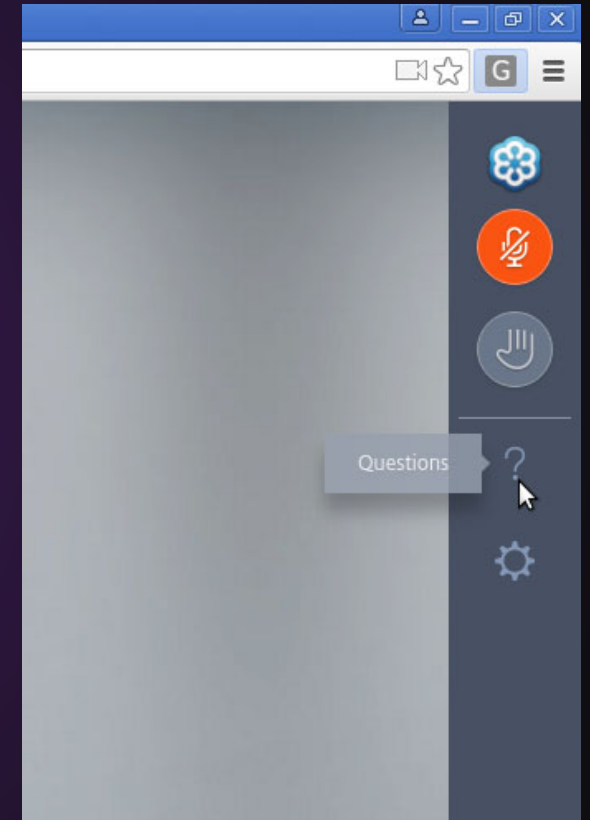
<https://support.goto.com/webinar/att-user-guide>

Short → **bit.ly/access20**

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www.southwareanswers.com



For Questions During Webinar



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eazy**stock**

 aptean

Powered by SSAS
SouthWare


Tax compliance done right

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Special Webinar

**Build supply chain resilience in 2023 with
inventory optimization**

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

Winner will be announced at the webinar.

<https://go.eazystock.com/build-supply-chain-resilience-in-2023-southware-registration-us>

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Special Webinar

Reduce your audit risk and automate tax compliance with Southware and Avalara

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/WN_Wo-wagXkSNuyYaGk1Dr89g

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Opening Poll Questions

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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 Apteian Southware regarding product & user experiences**

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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

SouthWare's Killer App
Configure Solution to Address Changing
Business Needs

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

- **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 2021

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

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

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Continuity... Unbroken

SouthWare

- Continuous Development since 1984
- Same Codebase Handles All Supported Platforms & User Interfaces
- Current Customers Using Southware Almost 40 Years

Your Business

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

Continuity... for the Future

SouthWare Partners

**Aptean SouthWare
Application Support**

**Aptean SouthWare
Development**

**Aptean SouthWare
Professional Services**

**Aptean SRE
Cloud Operations**

Aptean COE Support & Development

Aptean Global Support

Integrated

End to End

integrated | adjective | /'in(t)əˌgrādəd/ | formed or united into a whole

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Integrated E2E... Benefits

- Ease of Learning
- Transparent Processes
- Easier Data Compatibility
- Reduced Costs
- Increased Automation & Efficiency

SouthWare Integrated E2E



SouthWare Supporting Solutions

SouthWare Tools (Reporting, Importing, WorkFlow, Extended Data, Forms Adapter...)

SouthWare Partners, Aptean SouthWare and SouthWareAnswers.com

Additional Add-On Solutions

Executive / Power BI*

Inventory / EazyStock*

Shipping / StarShip*

SalesTax / Avalara*

Credit Card / ACH*

*Partner & 3rd Party Add-Ons

Integrated E2E... Employee

- **Common Interface**
 - Easier to Learn
 - Web Portals...
- **Reduce Offline and Spreadsheet Management**
 - Integrated Transparent Processes
 - Document Scanning...
- **Reduce Non-Core Activities**
 - Avalara Sales Tax Automation
 - E-Send Invoicing
 - Credit Card / ACH...

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Integrated E2E... Supply Chain

- Automate Inventory Management
 - EazyStock Inventory Planning
 - SouthWare Purchasing Controls...
- Optimize Inventory Handling
 - Warehouse Management
 - Barcode Scanning...
- Reduce External Dependencies
 - Manufacturing...
- Reduce Distance with Partners/Vendors
 - API Integrations
 - EDI...

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Integrated E2E... Costs

- Automate Pricing Updates
 - One List Price or Cost with SouthWare Pricing & Price Overrides...
- Customer Self-Service
 - Website Integration...
- Reduce Manual Tasks
 - AP Automation
 - SouthWare Tools
 - Credit Card / ACH...
- Expand Customer Base
 - Aptean CRM...

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Integrated End-to-End

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Warehouse Tracking

- Warehouse Only Transactions
- Warehouse Areas and Storage IDs
 - Bins, Pallets, Trailers, License Plates...
 - Bin Attributes – Secure, Refrigerated...
- Receiving, Put Away, Shipping, Pick-Pack, Multi-Bin
- Physical Inventory, Cycle Counts
- Customizable Browser Based Scanner Interface



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Warehouse Tracking

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

File Edit Approx Search Next Previous Enter Options Breakout Link Help

Warehouse Storage ID Manager

Main Warehouse Areas Items Storage IDs Attributes

- Warehouse Storage ID Manager
 - Warehouse Areas
 - Stock Items
 - Storage IDs
 - AREA
 - Area
 - Area *ASSEMBLY
 - Area *DEFECTIVE (Stock# 100)
 - Stock# 100
 - Area *RECEIVINGS
 - Area *RETURNS
 - Area *STAGING
 - Bin-Large
 - Bin-Large 3100A (Stock# 500)
 - Bin-Large 3100B (empty)
 - Bin-Large 3101A (Stock# 501)
 - Stock# 501
 - Bin-Large 3101B (Stock# 501)
 - Bin-Large 3102A (Stock# 501-BC)
 - Bin-Large 3102B (empty)
 - Bin-Large 3103A (Stock# 501-ENV)
 - Bin-Large 3103B (empty)
 - Bin-Large 3104A (Stock# 502)
 - Bin-Large 3104B (empty)

Stock# 501
 24# Classic Laid Gold Foil
 Stationery
 500 pages/ream
 Storage ID: 3101A
 On Hand Quantity: 373.000 RM
 Weight: 1119.000 (3.000/RM)
 Volume: 87188.750 (233.750/RM)

Preview Off Refresh Exit

DEMO 10/17/22

Web Menu Warehouse Storage ID Inquiry

Prev Page Options

Stock No: 100
 Desc: 747 Swingline Desk Stapler
 Total OH: 4,559.000 EA
 Category: OS

Storage ID	Qty OH	Last Put
*DEFECTIVE	8.000	10/05/22
*RECEIVINGS	2,740.000	01/28/23
*RETURNS	26.000	01/28/23
*STAGING	2.000	06/17/22
2100A	1,533.000	07/10/20
2100C	250.000	07/10/20

Pending Trx:

Type	Priority	Trx #	Qty OH Adj
ADJ		3	5.000
			5.000

Check Another Stock #

Warehouse Tracking

- Connect with Your SouthWare Support Partner to
 - Schedule Demo
 - or Build Project Plan for Your Business

southwareanswers.com/warehouse

→ Link on Conference Resources Page



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Aptean CRM

**The Only
Full-Featured
Mobile CRM**

Complete access
anywhere on iOS or
Android device



- User-friendly design
- Keep your contacts close
- Manage your pipeline
- Customizable for your needs





- Contact Management
 - Opportunity Management
 - Tags
 - Alerts
 - Mobile CRM
- Business Card Reader

Marketing

- Case Management
- Change Requests
- Knowledge Base
- Asset & Contract Management
- Customer Self Service Portal

Customer Service

Maps

- Customization Tools
- Outlook Integration
- Gmail Integration
- Telephony Integration*
 - Deduplication
 - Security
- 2-factor authentication

Tools

Cloud

- Campaign Management
 - Email Marketing
 - Email Designer
 - Lead Qualification
 - Lead Scoring
- Landing Page Integration
- Web Visitor Tracking

- Powered by Google Maps
- Embedded in Aptean CRM
 - Route Planning
- Map Companies, Contacts, Opportunities & Leads

Aptean CRM is a native cloud application

Aptean CRM



AIR APPLICATIONS, INC.

Company

- COMPANY DETAILS
- HISTORY
- PROFILE
- MAP**
- More...

retail

Back to results Hide



T.J. Maxx

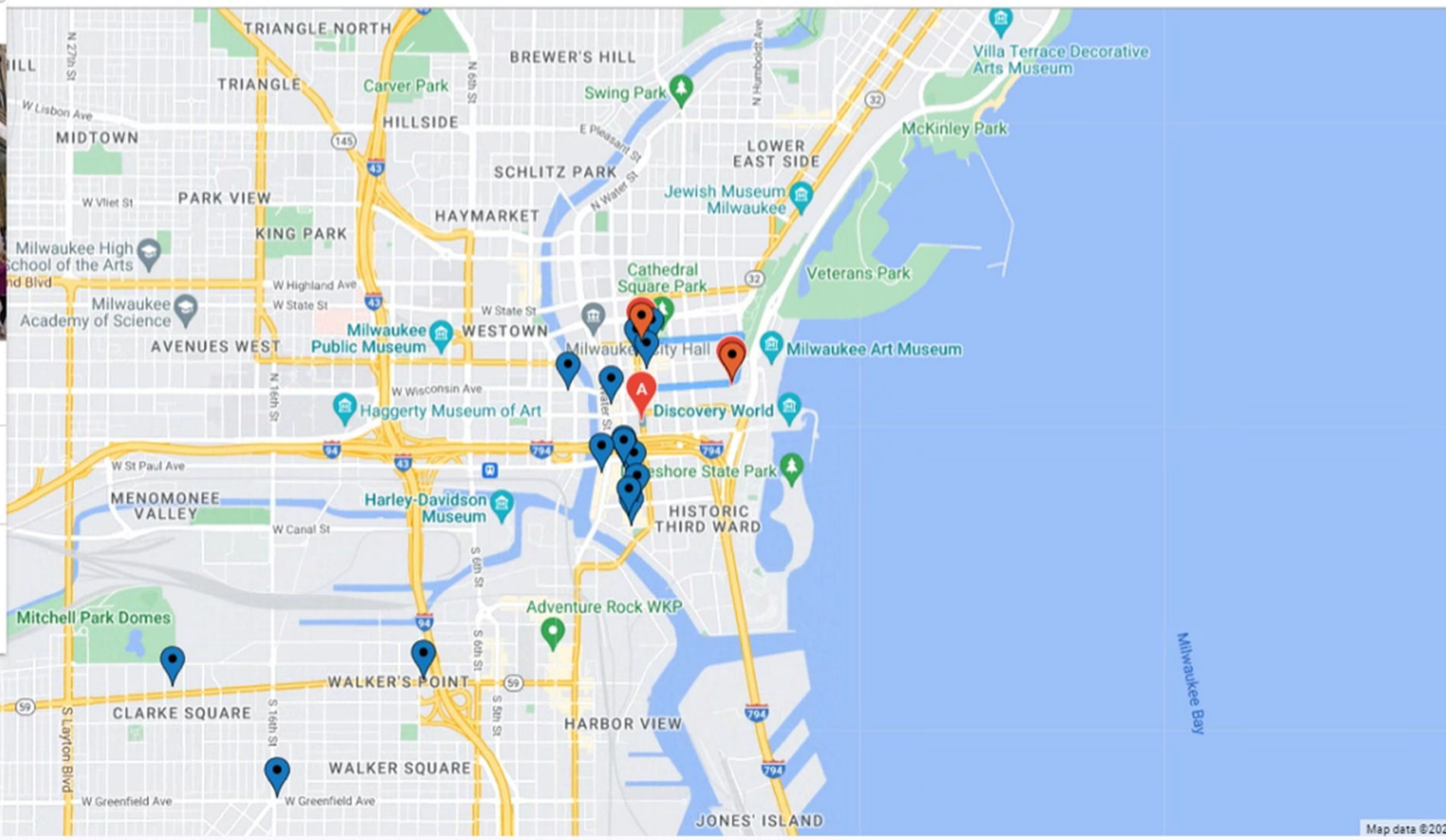
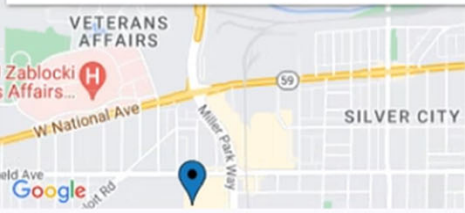
★ 4.3

- NEW COMPANIES
- DIRECTIONS
- GO TO LOCATION
- ADD TO ROUTE

161 W Wisconsin Ave, Milwaukee, WI 53203, USA

(414) 347-9603

<https://tjmaxx.tjx.com/store/index.jsp>



Aptean CRM for SouthWare

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

SouthWare Web Menu

Launch

QuickScreens Menu **AR - Aptean CRM Interface Hub**


Aptean CRM Options

- Overview
- Setup Steps
 - Configuration Options
 - Select Files to send to Aptean CRM
 - Scheduled Action Record
- Test/Send Data to CRM
- Print/View Sync Records
- Other Options

Description

SouthWare Interface to Aptean CRM

Aptean CRM helps you nurture customer relationships and increase your competitive advantage.



Aptean CRM

Aptean CRM Hub

Handles Configuration of Aptean CRM Interface

Data that can be exported to Aptean CRM:

- Customers & Primary contact from the customer record
- Customer Summary Aging
- Open Orders
- Open Quotes
- Invoice History
- If using TaskWise:
 - Prospects
 - Contacts (customer and prospect contacts)

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Aptean CRM for SouthWare

- Deep Stable Cloud Based CRM Product
 - Required SouthWare Revision 16-063022 (June, 30 2022)
 - You Define Sync Schedule and Sync Details
 - Standard Simple Implementation!
-
- For More Information talk to your SouthWare Support Partner or see the Aptean CRM Webinar Video

southwareanswers.com/apteancrm

→ Link on Conference Resources Page



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SouthWare Roadmap

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SouthWare Roadmap

Commissions Portal

- This portal lets you review the information in SouthWare related to salesperson commissions.

The options in this portal include review of:

- pending commissions and supporting details
- previously reported commission info
- standard salesperson commission info
- split commission arrangements
- override commission records

*All Items Subject to Change

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SouthWare Roadmap

Commissions Portal Pending Commissions Tab Sample

Pending Commissions | Reported Commissions | Salesperson Info | Split Commissions | Override Commissions | ?

This list shows commissions that do not have a reported date. The commission amount background will be yellow if the commission amount was manually overridden.

Date Range: 01/01/21 thru 12/31/2099

Slsn	Commission	Commissionable	Prev Paid	O/R Comm	Sales Amt
AEM	\$1.57	\$31.45	\$0.00	\$1.57	\$58.00
AEM	\$3.85	\$77.00	\$0.00	\$3.85	\$493.00
AEM	\$27.50	\$25.00	\$0.00	\$27.50	\$900.00
AEM	\$2.25	\$45.00	\$0.00	\$2.25	\$120.00
AEM	\$10.00	\$125.00	\$0.00	\$12.00	\$125.00
AEM	\$25.00	\$500.00	\$0.00	\$25.00	\$500.00
BTR	\$8.88	\$148.00	\$0.00	\$8.88	\$250.00
BTR	\$22.50	\$375.00	\$0.00	\$22.50	\$375.00
BTR	\$24.00	\$400.00	\$0.00	\$24.00	\$400.00

Pending Commissions Info

Commission Record

Salesperson AEM
Customer Number 1 Carl Sanders
Open Item Post Date 03/04/21 12051723
Invoice Date 03/04/21 Apply To:
Document Number 3539
Sales Amount 493.00
Commissionable (Basis) 77.00
Commission 3.85
- Prev Paid .00
Edit Commission Amt
Commission Due Now .74
Reported Date 00/00/00

Item ID	Commission	Comm Basis	Price
1	.50	10.00	400.00
3	3.05	61.09	107.88
2	.30	5.91	39.90
	3.85	77.00	547.78

*All Items Subject to Change

SouthWare Roadmap

Interface to ApteianPay

- The integration to Apteian Pay provides you with an alternative to TSYS and Global Payments. ApteianPay provides a secure (card not present) payment gateway that stores credit card data in a secure cloud server rather than in SouthWare data files.

Positive Pay for Accounts Payable and Payroll

- Positive pay is a system for detecting check fraud that compares checks presented at a bank to a list of approved checks provided by the issuer.
- We will provide the ability to generate a Positive Pay file for multiple bank specifications.

*All Items Subject to Change

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SouthWare Roadmap

- Runtime (Extend10.5)
 - New runtime eliminates the need for Internet Explorer
- Replace JAVA requirement with Curl (cURL)
 - Currently, several credit card features such as processing credit card transactions from remote sites (remote tech portal, shopping cart), viewing Processor Transactions or Viewing Cards on File from within SouthWare requires JAVA
- Shipping Interface – Direct Interface Option
 - UPS
 - USPS
 - FedEx
- APIs
 - Generic APIs for connectivity between SouthWare data and 3rd party applications.

*All Items Subject to Change

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SouthWare Roadmap

Additional Tools

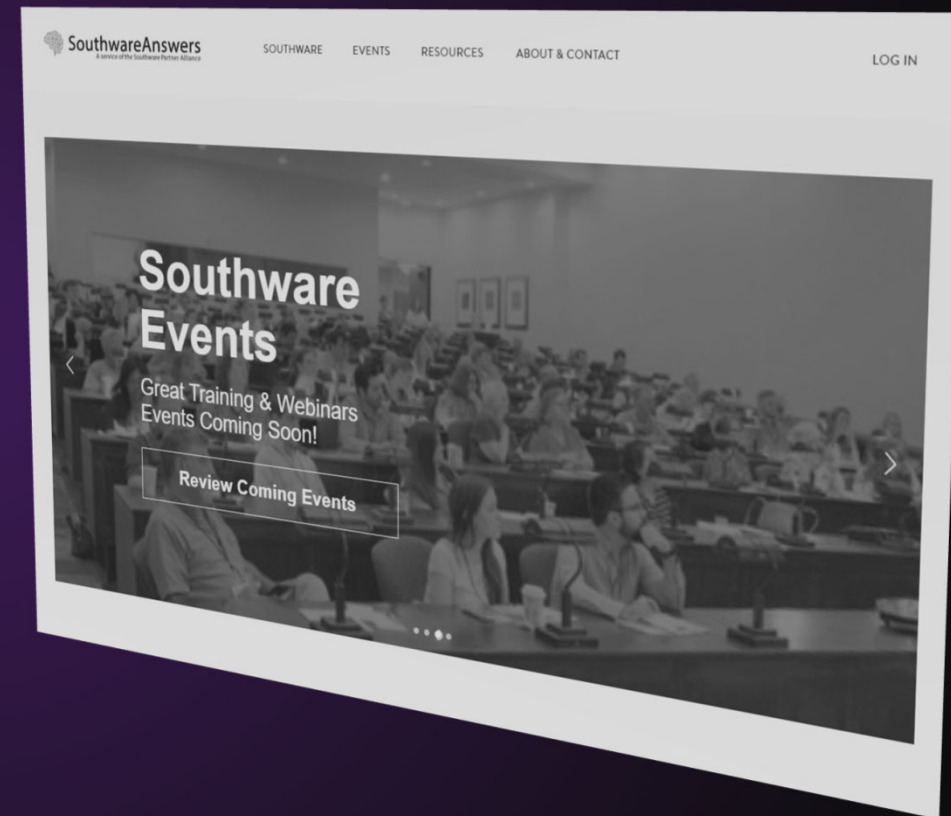
- Customer Rename
 - ability to rename or merge a customer account and update open/history items with the new customer number.
- Stock Item Rename
 - ability to rename a stock item and update open orders/history invoices with the new part number.
- GL Account Segment Edit
 - ability to add a GL account part to the beginning or end of your existing account structure.

*All Items Subject to Change

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SouthwareAnswers.com

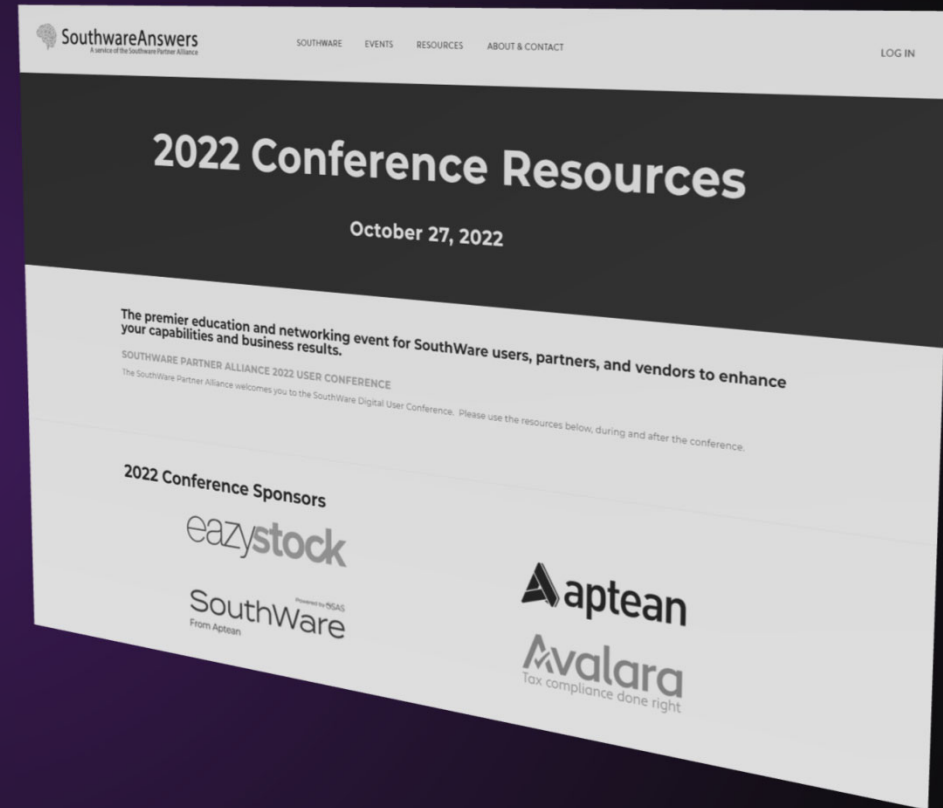
- **New SouthWare Page**
 - Module PDFs
- **StayCurrent Page**
 - Latest Enhancements
- **New Solution Pages**
 - Avalara
 - EazyStock
 - Aptean CRM
 - Power BI
 - MMS – Manufacturing
 - and more...



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2022 Conference Resources

www.southwareanswers.com/resources2022



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**Coming
Soon**

Aptean SouthWare Webinar

December 15

2022

Year-End Processing

**Announcement & Invite
Coming Soon!**

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Coming Soon

Onsite Live Event Planned

2023

Aptean SouthWare Training Event

- Deep Training Sessions
- Multi-Tracks

- More Information Released as Available

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Notes

- **Generate Awareness**
- **Learn New Things & Expand Understanding**
- **Learn from other End-Users Experience**

- **All Solutions are Available from *your* SouthWare Partner**
- **Contact your SouthWare partner for more information**

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Questions

**Connect with your
Southware Solution
Partner**



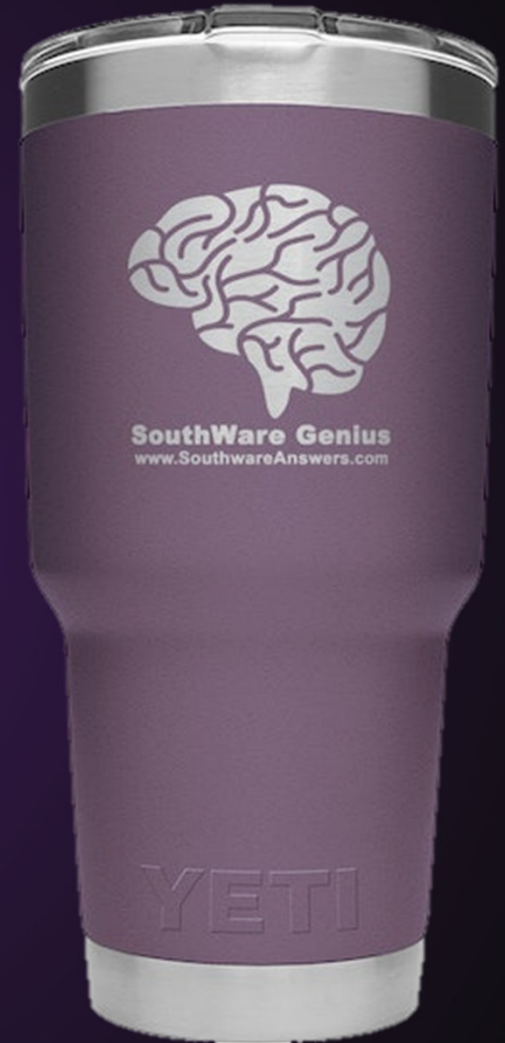
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Genius Video



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