

Macola Tech Tips To Make You An Expert Problem Solver

Supported Platforms

Macola has listed Windows XP Professional as a supported workstation platform for Progression SQL, running Macola with Microsoft's SQL database. There is no support yet for running Macola with the Pervasive database using Windows XP Professional. When support is announced, Pervasive 2000.SQL with service pack 4 will be the only supported version of Pervasive with Windows XP. Macola will not support Windows XP Home edition.

For EDI users, Sterling's GenTran Director product is not supported on Windows XP.

Macola will drop Windows 95 as a supported workstation platform on January 1, 2002.

Profit Center Descriptions

To enter descriptions for profit centers so they print on general ledger reports, use the System Manager – Maintain - System Accounts – Edit screen. When prompted for an account number enter all zeros in the main account section. Tab to the profit center account section field and enter your first profit center. Tab to the description field and enter the description for this profit center that you want to show on reports.

Received Not Invoiced Report

The Received Not Invoiced report uses the last receipt date for an item to determine whether it meets the date criteria specified in the starting and ending date fields on the selection screen.

Therefore, in the case where a line item is partially received twice, once e.g. on 10/28/01 and once on 11/2/01, if the ending date specified in the selection screen is 10/31/01 and the second partial receipt has already been entered, the item will not show on the Received Not Invoiced report since the last receipt date is now outside of the date criteria specified even though a voucher may not have been entered in Accounts Payable yet for the first receipt. Also remember that the report needs to be run before vouchers are entered for the new month because once a voucher is entered for a receipt, it comes off the report even if the voucher is dated after the ending date.



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Gaining Control over Your Business

This article introduces critical success factors (CSF) and key business metrics (KBM). The concept of critical success factors is that if you do a handful of things right, everything else falls into place. The concept of key business metrics is that you need to find a way to consistently measure your CSFs to see how you are doing. Each business will have different CSFs but all have them.

Your business will have CSFs at the overall company level as well as at the function level. One executive we spoke to recently stated that the only thing he needed to know was that they were shipping product on time 96% of the time with 98% accuracy.

At the function level, let's take sales and marketing as an example. CSFs may be: 1) allocate marketing dollars to activities that generate customers for less than \$335 each; 2) every qualified sales lead must have at least six "touches" and be kept active for 2.5 months; and 3) customer retention needs to be greater than 90%.

After defining your critical success factors, you now need a means to collect data on a timely basis that can determine if they are being achieved. For the first example, you must be able to set up specific marketing campaign codes in your customer relationship management system to track the source of the lead, e.g. spring promo– newspaper ad; spring promo– radio ad; spring promo– direct mail, etc. Your accounting system needs to have the ability to track all costs relating to a specific marketing activity. By tracking the

progress of leads to qualified leads to customers from one source, you can measure the cost per lead, cost per qualified lead, and finally the cost per customer to determine if the marketing activity was effective and to be used again or discarded.

In our example, CSF number 2 can keep your sales people motivated knowing that history has shown that on average it takes six touches (some of which can be automated) with the lead over a two and one-half month period to turn them into a customer. Management reports can be created to display the metrics so that potential leads are not overlooked.

Beachwood Systems can help you define your company's critical success factors and develop the key business metrics. Sometimes data capture requires creating a custom application or simply fine tuning existing systems. The goal is for you to spend more time analyzing the information and less collecting and calculating the results.



Management Letter

Happy Holidays to you and your associates. We thank each of you for the trust you have placed in Beachwood Systems to assist your organization with its computer needs. We feel extremely fortunate to have the set of honest and upstanding clients that we do. Somehow I think everyone will be a bit more grateful this holiday season.

Beachwood Systems has decided to help the world in its own small way by declaring war on computer viruses. If your company got hit with the Nimda virus recently, you know that we all must be vigilant in keeping virus protection software up-to-date and running on every computer in the organization. Most virus software programs can be set to automatically download updates easing the maintenance burden on your company.

Along with keeping viruses out, we cannot state strongly enough the importance that backups are verified as completing successfully each day. It is also crucial that a recent backup tape is stored off site. If you do not have the resources or expertise required, please ask us about our support plans so that we can make sure these important tasks are being completed. Our mission is to help you succeed.

Again, best wishes for a prosperous New Year.

Sincerely,
Adam Ryan



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Tips and Tricks for



Have you ever had a problem needing to create a filter or group but could not find any logical method on which to select the records? Many users run into this problem when they want to send a letter to several people they just talked to but have no criteria to select only those records.

One way to solve this problem is to use tagged records to perform your mail merge. By using tagged records you individually select only the records you want in the mail merge. You can tag, or select, multiple contact records from the Contact Listing or the Activity List. As you tag records, GoldMine indicates the total number of tagged records in the title bar.

To tag a record:

1. Open the Contact Listing browse window by selecting the Lookup | Company option.
2. Press and hold the Control (Ctrl) key and then click each record you want to tag for inclusion in the group. Records remain tagged as long as you don't close the Contact Listing browse window. You can remove the tag from any record selected in the Contact Listing by repeating the same steps used to tag the record.
3. Once your records are tagged, open your mail merge window and select the letter or e-mail to send to the tagged records. You must keep the Contact Listing Window open in the background.
4. To keep the tagged records for future reference, create a group using the Group Building wizard and select Tagged Records as the criteria.

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For information on upcoming training classes, please visit our web site: www.beachsys.com

Safeguarding Your GoldMine Data

Does your company have a level one disaster recovery strategy? Has it been tested recently?

If yours is like many companies then it probably has a backup plan in place. Beware... that is not enough! You need to go the next step of reviewing the backup each morning to verify that all files are being backed-up and periodically performing a test restore to verify that the data is ok.

If you have reviewed the backup log you may have encountered one of the most common problems which is certain files not getting backed up because they are "open". Most backup software will skip files that are open leaving you with an incomplete backup. Files can be open if a user forgets to logout of an application such as GoldMine, leaves their workstation on to run a

report at night, or the GoldSync server is running.

There are ways to get around this problem such as installing backup software specially designed to back up open files like ArcServe's Open Files Agent. Another strategy is setting a user's properties in GoldMine to force a logout at a particular time or after a period of idle time. GoldSync Server's operating system can be scheduled to automatically shut GoldSync down before the backup starts and then restart at a later specified time.

Unfortunately, it seems that each company must actually lose data before they understand the importance of these steps. With all that is invested in your GoldMine data, doesn't it make sense to safeguard it?

Microsoft Office XP and Windows XP

On October 25, 2001 Microsoft released its latest operating system, Windows XP, amid much media coverage. Here, we take away the media hype and look at the advantages of Windows XP and Office XP to help you decide whether to upgrade or not.

The biggest reason to upgrade to Windows XP is improved stability over 95/98/ME and improved compatibility over 2000. Businesses lose thousands of hours of productive time while employees wait for their computers to reboot after an application crashes. With Windows XP, crashes will be fewer and farther in between and in most cases if an application does crash, your computer will keep running. Independent testing laboratories have reported that this is the fastest Windows

yet, booting up 34% faster than Windows 2000 and starting applications 25% faster than Windows 98 SE. With XP, one computer can be shared by multiple people. Each can have his or her own settings and accounts. XP has a simpler user interface making it easier to understand.

In the event an Office XP application stops responding, Document Recovery gives you the option to automatically save your document at the time the application stops responding so as not to lose work. Office XP has SharePoint Team Services to allow seamless sharing between Office XP applications and your team website.

Windows XP Pro needs a P2-400 cpu and 128-256 mb RAM. Office XP needs a P2-400, 400MB of disk space, and Windows 98, ME, NT, 2000, or XP.

Macola Versions 7.6 and 8.0

Version 7.6 will be released in early December for both the Btrieve and MS SQL databases. This version will see several modules moved to general release status including SQL Payroll, RMA, Web.Orders, OE to PO, and POP Data Collection. Quoting and Estimating and SFC Data Collection will be close behind.

While version 8 is still a ways off with controlled release scheduled for first quarter 2002, it promises to be the best version of Macola yet providing over 150 functionality enhancements.

Based on feedback from users and industry sources, Macola significantly improved the user interface. These are some of the planned improvements although the code has not yet been finalized:

1. Left justified screen layouts with push buttons on the right-hand side to give the screen a more balanced look.
2. Labeling page tabs to indicate what is on the page instead of using labels like "page 1."
3. When printing to file you will be able to specify the file name.
4. The ability to link three documents to major maintenance files such as the customer, item, and vendor master files.
5. The ability to open additional maintenance screens directly from within another maintenance screen using push buttons. For example, item location can be opened from the item master screen.

Other changes will incorporate new functionality such as:

1. The item number field will be a 30-character field instead of 15.
2. New Excel based reports and an additional Excel Add-In module to allow for further reporting, data extraction, and analysis of Macola data using Excel.

3. Serial/Lot numbering established at the item level to allow different sequences for different items.
4. Enhanced commission calculations allowing you to define 17 methods for calculating commissions with the ability to edit commissions on a line-by-line basis.
5. The ability to cancel a picking ticket that was printed by accident.
6. Production Order Processing will use a manufacturing calendar to establish which day production departments are open.

A major distinction between version 8 and version 7.5 or 7.6 is that version 8 will only run on Microsoft's SQL database whereas version 7.x runs on either Microsoft SQL or Pervasive.

The best news, however, is that after upgrading to SQL the upgrade to version 8 is free to all Macola end-users who are current with their annual maintenance.

SPECIAL PROMOTIONS!

Have you been putting off your Macola upgrade from Pervasive to Microsoft SQL server? Don't wait any longer. From now through December 28, 2001 companies that purchase Web.Orders will receive Macola's SQL upgrade at no additional charge. For a site with 25 users, this offer is worth \$8,750!

Still running Macola version 6.3? Version 6.3 support ends on March 31, 2002. From now until March 31, 2002 you can upgrade your Macola version 6.3 system to Progression version 7.5 or Progression SQL for \$350 per user.



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1/29 – 1/30

Day 1: System Manager

Day 2: Database Tips, Client Setup,

File Purging, & Basic

Troubleshooting

Crystal Reports for Macola

2/5 – 2/6

Day 1: Creating Reports & Selecting and Sorting Records

Day 2: Creating Formulas &

Formatting Sections & Presentation

Quality Reports

Manufacturing Planning

and Control (MPC)

2/12 – 2/14

Day 1: Inventory & BOM &

Production Order Processing

Day 2: Master Scheduling / MRP

Day 3: Processing Transactions

Distribution

2/18 – 2/21

Day 1: Inventory Management

Day 2: Order Entry

Day 3: Purchase Order & Receiving

Day 4: Order to Cash Cycle &

Purchase to Pay Cycle

* Please see our web site, www.beachsys.com for details and current schedule information.