

## Cell Phone and PDA Converge Into One Device...

(This would make a great holiday present!)

The newest sensation in personal electronics is an integrated cell phone and PDA including wireless web access. There are several on the market to choose from. While these devices all perform similar functions, the differences in features between models can really determine how much functionality and enjoyment you get out of your particular model.

The T-Mobile Pocket PC Phone Edition communicates using the GPRS standard that offers data transfer rates of up to 56Kbps, similar to a landline dial-up connection. Handspring's Treo 270 comes standard using the GSM standard that offers data transfer rate of up to 14.4Kbps rate. However, the Treo can also be upgraded to use the faster GPRS

standard. The GPRS standard is new and may not be available in all areas. The Audiovox Th?ra uses the CDMA 2000-1x high-speed data service that is only available in selected areas and has data transfer rates of up to 144Kbps, but typically around 50Kbps. To maximize web access speed it is important to use web sites that are specifically designed for wireless connections such as MSN Mobile and AvantGo.

The operating system and how well the device integrates the phone and PDA should be considered. The two main operating systems are the Palm OS and Microsoft's Pocket PC OS. T-Mobile's device allows you to dial a phone number directly from the contact database, which most devices do not. Handspring's device has a

thumbable keyboard that can speed data entry (compared to using a stylus pen) and may allow you to take better advantage of the PDA features.

On the other side if you plan on using your device more as a phone then it's important to note that T-Mobile's and Handspring's devices can be held next your ear like a standard phone while the Audiovox Th?ra requires a headset.

As money does not grow on trees, it is important to get the features you want at the best value. Cost is comprised of three components: the price of the device which is about \$500 for the T-Mobile and Handspring and \$800 for the Audiovox, the cost of a voice service contract, and the Internet data connections. ✦



**Beachwood  
Systems  
Consulting**

# The Next Wave

WWW.BEACHSYS.COM

A Newsletter about PC Network issues, ERP and CRM applications, and Software Development

Issue #14

November / December, 2002

(216) 765-0220

## Microsoft to Release Next Generation of Server Operating System

Microsoft's latest product offering in their server line of products is .NET Server 2003. .NET Server 2003 is replacing Windows 2000 Server. The product is in Release Candidate 1 status which is the first post-beta version of the software. General release will be determined by the success of the RC1 release but is slated for an end of year release. Microsoft currently uses the product extensively in-house including running all of its Web servers on it.

.NET Server 2003 comes in Standard, Enterprise, Data Center, and Web editions. Recommended system requirements include a Pentium server running at least 550 Mhz with 256MB of RAM although Microsoft's stated requirements are lower.

The operating interface resembles Microsoft's XP interface and uses a similar task bar to navigate to programs. In an effort to reduce software piracy, end users must register their copy of .NET Server with Microsoft within 14 days just like Windows XP requires.

Microsoft states that .NET Server 2003 provides improved security, reliability, availability, and scalability over Windows 2000 Server. More tangible examples of improvements are a Manage Your Server wizard that allows an administrator to configure about a dozen common functions such as DHCP, DNS, IIS, Terminal Services, and file serving. The Active Directory wizard makes it easier to work with users, groups, and security

settings. Improvements found in IIS 6 include application pooling which can be used to keep Web applications up and running, and more flexible clustering and load balancing.

If your company is currently running Windows 2000 or Windows NT Server v4.0 many experts view .NET Server as the next logical upgrade. Upgrade timing though is more critical if you are running NT Server as this product has begun its retirement phase. Sales through several of the channels have already stopped and support options will start being limited on January 1, 2003. Upgrade timing should also consider your willingness to be on the cutting edge of technology that means possibly installing hot fixes and patches that are usually common before the first service pack is released. ✦



### Management Letter

The theme to this issue of *The Next Wave* is convergence. The back page article talks about the converging cellular and PDA technologies. By merging these two devices together, the usable functionality of both devices is improved and means you now only have one device to carry around.

Convergence can also be seen in the articles about GoldMine CustomerIQ and Exact's e-Synergy. GoldMine CustomerIQ is built on Microsoft's .NET architecture to allow more integration with back-office ERP and web applications. Exact's e-Synergy product boasts new integration with Exact's Macola Progression series ERP software allowing your whole company to take advantage of one shared database.

A final idea of convergence we commonly implement is the merging of two separate sites within a company into one virtual network through the use of remote access software such as Citrix.

It's hard to believe the holidays are here already. From all of us at Beachwood Systems to all of you, we wish you a safe and joyous holiday season.

Adam Ryan

Beachwood Systems Consulting is a full service computer firm providing consulting, PC & network support, ERP & CRM business applications, and Web and Windows based software development using Visual C++, Visual Basic.NET, Microsoft Access & SQL, and Seagate Crystal Reports.



**Beachwood Systems Consulting, Inc.**

P.O. Box 22690

25800 Science Park Drive, Suite 100

Beachwood, Ohio 44122

[www.beachsys.com](http://www.beachsys.com)



## Look Inside...

**Pages Two and Three:**

- GoldMine CustomerIQ
- e-Synergy
- Tech Tips and Tricks
- Training & Promotions

**Page Four:**

- Cell Phone and PDA Convergence



**Spice up your emails with graphics. Here are the steps for sending an HTML template:**

- 1) Create an html file using FrontPage or another html development program.
- 2) Go to the Document Management Center in GoldMine by selecting Edit|Custom Templates.
- 3) Select the folder labeled Email Templates. Right click on the folder and select New.
- 4) Name the Email Template by typing a description in the Subject Line.
- 5) Click in the body of the template
- 6) From the Email Toolbar click the Insert Field Button and select Include A Text File.
- 7) Browse to and select the html file you created in step 1.
- 8) Click the Save Template icon.
- 9) Close the Document Management Center.
- 10) Go to Contact|Create E-mail|E-mail Merge.
- 11) In the User field select the user that the template is stored under. In the Template field select the correct template.
- 12) Under the Recipient Tab select the correct contact or select All Contacts in the following Filter or Group and select the correct filter.
- 13) In the Delivery section choose Send Now or Queue for Later Delivery. Click OK.

**Training** is worth its weight in Gold! Why struggle when you can spend one day to become more productive all year? Beachwood Systems offers Intro, Intermediate, Advanced, Administrator, and many more classes. For information on upcoming **GoldMine training classes**, please call or visit our web site: [www.beachsys.com](http://www.beachsys.com).

## GoldMine CustomerIQ

FrontRange Solutions Inc. recently launched its next generation customer relationship management (CRM) software called GoldMine CustomerIQ.

One of FrontRange's goals with the software was a greater focus on targeting medium sized companies in specific vertical markets. FrontRange has taken this approach after determining that businesses want a solution designed for their industry rather than a solution with bells and whistles that they will never use. The first two vertical market solutions are targeted at manufacturing and wealth management. Some of the functionality offered for the manufacturing sector includes the ability to define, create, and track an issue or case; coordinated scheduling through calendar integration; and the ability to track orders and quotes through embedded back-office ERP system integration.

GoldMine CustomerIQ is built on Microsoft's .NET architecture, XML-based Web services

technology, and proven technology tools to create an easy-to-use, adaptable CRM solution to fit your business and your business processes. By providing these underlying industry adaptations and technical advantages out of the box, GoldMine CustomerIQ ensures quick time-to-value with reduced implementation and internal acceptance time. Another advantage of the .NET architecture is that it makes information available from virtually any location and device with access from a standard web browser.

GoldMine CustomerIQ will be available in limited release in November, with general availability slated for early 2003. If you would like to have more information sent to you or schedule a demonstration of the software when it is available please give us a call.

Be on the look out for Beachwood Systems bi-monthly seminar series covering CRM topics scheduled to start in February. ✦

## Macola Tech Tip – Month End Tab

Exact has created a Month End Processing tab that includes the standard processes that must be completed at the end of a period (typically end of month). You can customize the tab to remove processes that your company does not perform or add processes that you typically perform at period end. The tab includes processes from several Progression packages and could include processes for packages your company does not use. If a task has a line through it your company either does not have that package installed or you do not have access to that process.

Each task on the task list has a note associated with it to explain what is accomplished by running this task. You can add your own notes to the existing notes or you can delete the existing notes. If there is something you need to remember when you run a particular process or print a report then add that information to the Notes section for that task and press the Save Notes push button.

The Month End tab only shows automatically for the user Supervisor if Macola was installed new using version 7.6. If Macola had previously been installed and was upgraded to version 7.6 this tab does not show automatically. You can add the Month End Processing Task List tab to any user using the Import Tab feature from within Progression Workflow Explorer. When you updated to Progression 7.6. Progression placed the file monthend.tab in the autotabs folder in the PWE directory under the macolaroot directory (typically macola70\PWE\Autotabs for Btrieve and macsql\PWE\Autotabs for Microsoft SQL). To import the tab to the Supervisor user or another user:

1. Log into Progression Workflow Explorer as Supervisor.
2. Click File on the menu bar and click Import.
3. Browse to the Macola root\pwe\autotabs directory.
4. Click on the tab you want to import and click OPEN. ✦

Exact has and is continuing to integrate e-Synergy with the Macola Progression series software. ✦

\*\*\*\*\*

### EXACT SOFTWARE PROMOTIONS

Exact Software has extended the deadline until December 31, 2002, for upgrading to the SQL version of Macola for only \$350 per user. As an additional incentive you will receive five free additional users for your Macola system! ✦

## Exact Software's e-Synergy

Exact Software's e-Synergy software is a revolutionary, web-based front-office tool that provides combined visibility throughout an entire organization. e-Synergy is built upon three principles; all information should be stored in one central database, all information should be accessible anytime and anywhere by everyone with respect to their security settings, and business processes and tasks should be as automated as possible.

There are seven modules for e-Synergy: e-CRM, e-Workflow, e-Financials, e-Documents, e-HRM, e-Logistics, and e-Projects. e-CRM

allows you to manage all customer communication including marketing and lead generation centrally through one database. e-Workflow gives you the ability to model your business processes electronically to gain increased visibility and accountability into the status of any request assigned to an individual. e-Financials provides real-time visibility to financial data with transaction level drill-down, sales revenue, payables, receivables, and aging data. e-Documents allows for the centralized storage of your company's knowledge in one

system with document storage and publishing functionality. E-HRM allows your organization to maintain comprehensive information on all employees while allowing them to self-service many human resource tasks. e-Synergy's security gives you tight control over who sees what information and can act on it. e-Logistics allows you to electronically and centrally manage product catalogs to support sales campaigns, sales reports, and item forecasts. e-Projects organizes budgets, resources, documents, tasks, and other elements vital to the success of projects you undertake.



## Macola Authorized Training

### SPECIAL DISCOUNTS

10% off 2<sup>nd</sup> attendee, 20% off 3<sup>rd</sup> attendee, 30% off 4<sup>th</sup>+ attendee\*

#### Accounting

**12/17 – 12/19**

Day 1: General Ledger & Month End/Year End

Day 2: Accounts Payable

Day 3: AR/Bank Book

#### Distribution

**12/10 – 12/13**

Day 1: Inventory Management

Day 2: Order Entry

Day 3: Purchase Order & Receiving

Day 4: Order to Cash Cycle & Purchase to Pay Cycle

#### Manufacturing Planning and Control (MPC)

**2/6 – 2/8**

Day 1: Inventory, BOM &

Production Order Processing

Day 2: Master Scheduling / MRP

Day 3: Processing Transactions

#### ERP Manufacturing

**11/19 – 11/22**

Day 1: Inventory & BOM

Day 2: Standard Product Routing

Day 3: Shop Floor Control

Day 4: Manufacturing Cost Acctg

#### System Administration

**1/22 – 1/23**

Day 1: System Manager

Day 2: Database Tips, Client Setup, File Purging, & Troubleshooting

#### Crystal Reports for Macola

**11/13 – 11/14**

Day 1: Creating Reports & Selecting & Sorting Records

Day 2: Creating Formulas & Formatting Sections & Presentation Quality Reports

\*Please see our web site, [www.beachsys.com](http://www.beachsys.com) for details and current schedule information.