

## OneNote Will Get You Organized

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Note window whenever you want to take a quick side note while you're working in other programs. Can reuse note pages, sections, etc in other Office 2003 programs including PowerPoint and Word.

- Can perform full-text searches of your notes using the Boolean AND, OR, and NEAR operators. Can use quotation marks to match exact phrases. Can limit search by age of notes and sections of notebook.
- You can share your OneNote files in a variety of ways. Can put OneNote files on a network share and allow many people to access them. File locks are at the Section level so if you happen to be working on a page in a particular section, another user will only be able to read them until you leave the section.
- Can share them via email easily if you have Outlook 2003. OneNote automatically converts the notes to HTML and puts them into the message body so that even recipients who don't have OneNote installed on their computer can read them. But, you can still copy and paste or attach a section file as an attachment with any e-mail client.

- Can publish them as HTML web pages simply by clicking Publish on the File menu and selecting the destination. Can edit these pages using FrontPage.
- Can put into a document library on Windows SharePoint Services in the native OneNote format. OneNote is designed for collaboration with its built-in shared workspace task pane to see other workspace members.
- Choose a style of paper for a notes page in OneNote—for example, lined, graph, or blank.
- If you have a notebook computer attached to a network, you can work offline or on different computers by using Windows Explorer to select the My Notebook folder and then on the "File" menu, choose "Make Available Offline."
- Each section of your notebook is a separate file on your computer that has a .one extension. These section files are stored in folders and subfolders within the My Notebook folder which in-turn is stored within the My Documents folder. You never need to save data. OneNote saves itself periodically and upon exit and makes an archival backup copy that it can revert to if the original file is damaged.

The requirements for OneNote are as follows. Microsoft Office 2003 is not needed to use OneNote but you do need Outlook 2003 if you want to create tasks from OneNote or email notes directly. The application requires Windows 2000 with Service Pack 3 or Windows XP. You do not need a tablet pc but it is well designed for use with the Tablet Edition of Windows XP. On a desktop pc, a pen input accessory is best for sketching but you can use your mouse. OneNote has enhanced capabilities that enable people using Tablet PCs to hand-write notes or draw diagrams with "digital ink". Digital Ink treats handwriting as if it were text, such as permitting the ability to search handwritten notes and can convert them to text. Handwritten notes can be entered into a pc running the regular version of Windows XP but they are simply stored as an image, not as digital ink.

OneNote can be purchased anywhere Microsoft Office is sold. List price is \$199. There is a \$100 mail in rebate for customers that own almost any version of Microsoft Office or Microsoft Works. If your company is entitled to purchase Volume licenses, there is a promotion offering a 50% discount if you purchase before September 1<sup>st</sup> of this year.



**Beachwood  
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# The Next Wave

WWW.BEACHSYS.COM

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

Issue #19 February /March 2004 (216) 823-1800

## OneNote - A Nifty New Application for Microsoft Office

Seems like only yesterday when Microsoft released Office XP. But now a new version, called Microsoft Office System 2003, is available. The word "System" is in the product name because the emphasis of this release is on collaboration in the workplace for instance using SharePoint Services and XML. Microsoft Office OneNote 2003, the focus of this *NextWave* article, is a new member of the Microsoft Office System although it can be used as a standalone application.

OneNote provides a way to get rid of "all of those little pieces of paper" and even more importantly get rid of the trusty legal pad by providing one place to store all of your notes. And as a by product of diligent usage, it is also a way to improve the human memory with its ability to quickly retrieve information later.

OneNote is not the first program to allow you to enter and search for free-form notes. Personal Information Manager (PIM) programs such as InfoSelect permit you to do this. Specialized databases such as Ask Sam have this capability. And Contact Management programs like GoldMine permit entry and search of free-form notes using its InfoCenter feature.

So what is different about OneNote? First off, the recording of notes is all it does. It is not an added feature. Along with the novel user interface which we will get to in a moment, the thing that sets OneNote apart is the way it lets you take notes. OneNote is a note-taking program.

Here are some of the things that OneNote does and how it works.

- Enter in notes about anything. Record knowledge as you learn it. Take notes at a meeting or presentation. Gather research material from Encarta Encyclopedia, various research web sites, etc.
- Can type in notes, hand-write notes, make sketches, audio record them using

your computer's microphone, or copy them in from web pages and other digital documents. Can put them anywhere on the page. Rather than using a legal pad, putting them in OneNote initially avoids having to retype them later or not capturing them electronically at all. You can synchronize typed notes with the audio recording of a meeting or presentation and use your notes as an index to access the audio recording.

- Permits you to be more spontaneous getting notes in. Your notes can be organized later. A Notebook can first be organized by Folders if you wish. Each folder has user definable Section tabs going across the top and user definable Page tabs going down the right side of the screen. As you switch sections, a new set of page tabs appear allowing you to find information fast. You can also add Sub-Pages to pages.

- You use "Note Flags" (standard and custom) to mark a note for follow-up or to help organize it more easily later. You can flag notes with shapes, text color, or highlighting, so as to prioritize action items and important information.

- If you wish, you can enter notes in a vertical or horizontal outline format simply by pressing the tab key. You can insert headings for each level and expand or collapse the text below it as well as the level itself.

- By clicking on the "N" icon in your task tray, you can quickly open a miniature One-

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### Management Letter

Business is easy, right? All you have to do is to keep the customer happy. This issue of *The Next Wave* has a few ideas to help you do just that. Development and execution of a good Customer Relationship Management strategy is a good place to start. You need to have strategies to attract customers, convince them that you are the firm they want to do business with and then keep them as a customer for life.

Using software that alleviates and provides rapid response to customer inquiries is a key. The StarShip shipping system is described on page three. One of its features is to send an email to the customer with the tracking number as the shipment is made. However, if the customer deletes it when clearing out the spam from her inbox, you can simply look up the order since the tracking number was also written back to the order record... very nice.

You can provide rapid response to customer inquiries through use of OneNote. OneNote is a great new application from Microsoft that allows you to enter and quickly locate notes about anything. Let's say you have notes about one of your products or services that the customer needs specifics about. No problem, just click on the right section and page and there is the information.

Keep the customer happy and you'll end up being happy too.

Steve Rogers

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 the .Net platform, XML, Visual C++, VB, Microsoft Access & SQL, and Seagate Crystal Reports.



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# What Is Customer Relationship Management?

Customer Relationship Management (CRM) is partially about software but mostly about strategy. A CRM strategy defines the process of interacting with your customers or clients in efforts to maximize the relationship for profitability.

The strategy typically involves three important functions in organizations: marketing, sales and customer service.

**Marketing:** Today's businesses scrutinize every dollar spent to generate business. Gone are the days of mass mailing or faxing to large lists of contacts. Targeted, specific marketing is essential to maximizing your Return On Investment (ROI).

**Sales:** With centralizing prospect and customer databases and automating the routine sales tasks, most businesses are able to keep their

salespeople in front of their customers or clients. Additional benefits include visibility to management and the organization of a centralized system. From simple tasks of writing letters to sending emails and delivering proposals, a good system maintains each customer contact and communication to tell the whole story allowing fewer salespeople to service more prospects or customers.

**Customer Service:** You've invested in marketing and earned customers or clients through your sales process – now you need to keep them happy. All customer inquiries should be logged and handled efficiently. Key clients or customers should have preferential treatment and issues should be escalated as appropriate.

In short, good customer relationships are at the heart of business success. There are many technological components to CRM, but thinking about CRM in primarily technological terms is a mistake. The more useful way to think about CRM is as a process that will help bring together lots of pieces of information about customers, sales, marketing effectiveness, responsiveness and market trends.

## Goldmine Training

Introduction March 4 -one day  
Intermediate March 11-one day

See our web site for additional classes and schedules for all aspects of GoldMine usage.

# What Role Does Software Play with CRM

What role does software play in developing a good customer relationship management process?

As CRM has developed into its current role, it has been synonymous with software. The prevailing thought was that if you wanted CRM – start with buying some software. While software is certainly a major component of CRM – it is not CRM by itself. CRM allows organizations to leverage technology to assist them in making customer-centric business decisions.

A CRM system usually consists of a centralized database as a means to capture valuable prospect and customer information that can be shared across their businesses to make agile,

customer-centric strategies, and ultimately to help build more profitable customer relationships. Relationships are based on interaction and activities. This interaction ranges from phone calls and appointments to emails and paper correspondence. Most systems allow for you to track all of these interactions, allowing for a more complete picture of your business relationship with the contact or organization.

Some benefits using CRM software can offer a company are:  
-ability for your marketing department to import a purchased mailing list or import leads from a trade show and follow-up with a direct mail piece in a few simple clicks or com-

mands.

-visibility into your salespersons' schedules and opportunities which allows management to "coach" their salespeople and have awareness of the pipeline and the demands it may impose.  
- the ability to structure your sales process and allow for a defined set of procedures that keeps leads from falling through the cracks.  
- the ability to evaluate and calculate your Lead Generation, Lead Nurturing and your Close Ratios allows you to make quick decisions to improve your revenue generation.

Having the *ability* is what CRM is all about!

# Shipping Has Never Been Easier With Exact Macola

A very popular third party solution for Macola has been V-Technologies "StarShip" product line. V-Technology specializes in shipping automation software, software that allows for integration to Macola as well as an interface to UPS's billing system. Rate tables are maintained and sent to you, the user. This series of products seamlessly interfaces to either Macola 7.6 or the new ES product. Whether you have a p.sql or ms.sql data base, the products are available and supported.

**StarShip** is a multi-carrier shipping system with a real-time interface to sales documents. Carriers supported include: UPS, FedEx (Express and Ground), US Postal Service, Airborne Express, Spee-Dee and a User Definable Carrier. New features including communications to UPS via the Internet and an enhanced FedEx Server interface which now includes support for Ground and Home Delivery in addition to Domestic and International FedEx shipments.

**ShipGear** is middleware that connects UPS Online WorldShip to Macola. ShipGear is an ideal solution for companies shipping primarily with UPS and/or using the WorldShip software.

In addition to retrieving ship to information, StarShip and ShipGear also:

-Translates your ship via codes to ensure packages are shipped using the proper service.

-Interprets COD (avoids the

costly error of missing a COD shipment).

-Retrieves the e-mail addresses and automatically enables ship notification.

-Adds freight charges and shipment detail to the sales document. The UPS and FedEx tracker numbers are recorded in Macola for future reference.

-Can utilize Macola's Manifest Select Interface to allow for immediate invoicing.

**WinFreight** is a rate calculator that supports UPS, Federal Express, USPS and Airborne Express. Use it to quickly calculate freight for outbound and inbound shipments. The only information you need is the origin and destination ZIP codes, weight and service.

In conclusion, there are several features that make this software worth evaluating. (1) Automatic write back to Macola of freight charges makes billing easier and more accurate. (2) Writing back UPS and FedEx tracker numbers makes tracking orders simpler through the carrier web sites. (3) E-mailing shipping confirmation and tracker numbers to your customers reduces the work effort for customer service

For more information and to schedule a demonstration, call Gary Baum at 216-823-1800 ext 103.

## Exact Software User Conference

Macola has announced its first ever user conference, "ENGAGE". This event will be a forum for all Exact Customers to take part in informal sessions and provide customer feedback to Exact executives.

Plan for October 3-6, 2004 Chicago Hilton  
Check Software for future updates.



## Macola 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

2/24 – 2/26, 6/15-6/17

Day 1: General Ledger & Month End/Year End  
Day 2: Accounts Payable  
Day 3: AR/Bank Book

#### Distribution

4/20-4/23

Day 1: Inventory Management  
Day 2: Order Entry  
Day 3: Purchase Order & Receiving  
Day 4: Order to Cash Cycle & Purchase Order to Pay Cycle

#### Manufacturing Planning and Control (MPC)

2/10 – 2/12, 5/11-5/13

Day 1: Inventory & BOM & Production Order Processing  
Day 2: Master Scheduling / MRP  
Day 3: Processing Transactions

#### ERP Manufacturing

3/9 – 3/12, 5/18-5/21

Day 1: Inventory & BOM  
Day 2: Standard Product Routing  
Day 3: Shop Floor Control  
Day 4: Manufacturing Cost Acctg

#### System Administration

4/6 – 4/7, 6/8-6/9

Day 1: System Manager  
Day 2: Database Tips, Client Setup, File Purging, & Troubleshooting

#### Crystal Reports for Macola

3/23 – 3/24, 5/6-5/7

Day 1: Creating Reports & Selecting and 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.