GoldMine Training

Introduction to GoldMine
8/5, 9/2, 10/7
Topics include: working with contacts, managing activities and letter writing.

Intermediate GoldMine Functionality
8/12, 9/9, 10/14
Topics include: Working with data subsets including filter and group creating and performing tasks.

Advanced GoldMine Features
9/19, 9/16, 12/21
Topics include: the opportunity/Project Manager, GoldMine Report Writer and Automated processes basics

Administrative Capabilities
9/7-9/8   (Two Days)
Topics covered are designed to help your IT staff administer GoldMine

Power User Package
Special pricing on a bundle of Introduction, Intermediate, and Advanced classes.

The following classes are available on demand:

Automated Processes
This one day class is for users interested in automating their business processes.

GoldMine Report Writing
Covers writing reports in GoldMine report writer and Crystal Reports.

GoldMine Administrator Package
Special pricing on a bundle of Administrative Capabilities, Automated Processes, and GoldMine Report Writing classes.

Training is worth its weight in Gold! Instead of golf lessons this summer, obtain knowledge that has a year after year ROI. For class schedules, costs, student discount information and other terms and conditions for upcoming **GoldMine training classes**, please call or visit www.beachsys.com .

iGoldMine™

Now, it's easy to access the full functionality of GoldMine® Corporate Edition from any Web connection or from a local area network (LAN). With iGoldMine™ you can access your sales and marketing information, and your customer service and support information to better manage your customer relationships.

The power of GoldMine Corporate Edition lies in its ability to track customer relations across individuals, teams, and through the entire customer lifecycle. iGoldMine offers the functionality of GoldMine Corporate Edition with added security by eliminating the need to have locally stored information. A thin client strategy utilizes server-based computing to enable organizations to administer, deliver, and update applications from a central location to a wide variety of users. iGoldMine is a great solution for anyone who needs to access their customer information remotely.

A Flexible Solution that Gives Immediate, Real-time Access to Gold-Mine

Use iGoldMine to:
• Supplement regular access to GM
• Deliver new GoldMine applications to distributed teams
• Use existing desktop hardware without making upgrades
• Support the use of multiple desktop operating systems or platforms
• Replace synchronization procedures with live access
• Rapidly configure and deliver with the complete control of a central IT department
• Connect over a local area network (LAN), the Internet, or other network connection
• Create, view, update, print records
• Search for contacts
• View personal and group calendars
• Update schedules
• Manage correspondence, e-mail and e-mail folders
• Utilize GoldMine software's signa-

ture tools such as Opportunity Management, Automated Processes™ , Literature Fulfillment, and leads analysis

iGoldMine can be run either inside the browser, or as an extension of it. GoldMine provides an ActiveX control plug in for Microsoft Internet Explorer and also works with other browsers. iGoldmine can be run outside of the browser through use of a native client with even better performance.

The target market for iGoldMine is any customer who requires real-time remote access to GoldMine, or any existing GoldMine Everywhere Thin Client customer who is upgrading to GoldMine Business Contact Manager 6.6 Corporate Edition. Customers can only purchase the iGoldMine Server if they currently own GoldMine Corporate Edition licenses, or with new purchases of GoldMine Corporate Edition.

iGoldMine versus Synchronization

We are sometimes asked the question, "How does iGoldMine factor into my synchronization strategy?" In many cases, iGoldMine can replace synchronization. If your users work from one location most days (i.e. a home office, or remote office), or if your users spend a short amount of time in GoldMine each day, then iGoldMine is a feasible replacement to synchronization. Keep in mind that users will need to be connected to the iGoldMine server in order to work which in most cases is an internet and/or VPN connection to your workplace network. If your users require access to GoldMine data while on an airplane or in their car, for example, iGoldMine will not be the complete solution. When considering the administrative time involved in maintaining a synchronization server, laptops, and the process in general, the cost of deploying iGoldMine to users is an option to consider.

Progression 7.6.300 Released With Exciting New Enhancements

The much discussed release of service pack 300 is now available from Exact. If you have not received it you can contact Exact for them to reship your CD.   Remember that your maintenance must be current to in order to receive updates.   Since 7.6.300 has just been released, we suggest you wait a little longer before implementing.

Several modules have enhancements with this release. The modules include: 1. Accounts Payable, 2. Order Entry, 3. Purchase Order, 4. Payroll, 5. EDI, 6. Labor Performance, 7. Barcode, and 8. System Manager.

We don't have the space to discuss each enhancement so instead we will focus on Order Entry and Accounts Payable.

Order Entry - Over twenty five enhancements have been added. Here are a few:

• *Immediate printing* options allow you to print pick tickets, acknowledgements, quotes, and shipping labels when you complete order entry. You can also save shipping labels and print them in batch.

• *Price Codes.* There are several enhancements to price codes including a mass maintenance of end dates.

• *Billing in Picking Sequence* allows billing in pick sequence order which matches the sequence on pick tickets. The picking sequence is established in Item Location Maintenance in Inventory Management.

• *Immediate Invoice Printing* from Select for Billing allows you to print an invoice directly from the Order Billing Screen. When you complete the billing selection, the system prompts you to print an invoice. If you choose to print an invoice, the system opens the Print

Invoice screen with the starting and ending order number filled with the order you just billed. You must activate the option in O/E setup.

• *Order Entry Setup* has two additional screens. These allow you to set defaults for immediate printing, mass price changes, whole order pricing, and making quantity ordered equal quantity shipped.

Accounts Payable– In previous versions of Progression, in Accounts Payable there was no way to remove a credit memo from a voucher and reapply it to another voucher. Instead you had to cancel the Credit Memo and then re-enter it with correct apply to information. In this version a new Reapply option has been added that allows you to remove a credit memo from a voucher and apply it to a different voucher.

Exact has made available a 50 page document presenting in detail the Order Entry enhancements. Contact Gary Baum at 216-823-1800 ext. 103 or e-mail *baum@beachsys.com* for a copy or with any questions you may have.

Macola Training

Accounting
8/17-8/19, 9/21-9/23, 11/16-11/18
Day 1: General Ledger &
        Month End/Year End
Day 2: Accounts Payable
Day 3: AR/Bank Book

Distribution
10/11-10/14, 1/11/2005-1/14-2005
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)
8/10-8/12, 12/7-12-9
Day 1: Inventory & BOM &
        Production Order Processing
Day 2: Master Scheduling / MRP
Day 3: Processing Transactions

ERP Manufacturing
8/24-8/27, 12/13-12/16
Day 1: Inventory & BOM
Day 2: Standard Product Routing
Day 3: Shop Floor Control
Day 4: Manufacturing Cost Acctg

System Administration
11/8-11/9
Day 1: System Manager
Day 2: Database Tips, Client Setup,
        File Purging, & Troubleshooting

Crystal Reports for Macola
9/14-9/15, 11/10-11/11
Day 1: Creating Reports & Selecting
        and Sorting Records
Day 2: Creating Formulas &
        Formatting Sections &
        Presentation Quality Reports

Security: Ten Steps to Protect Your Business

The internet has gone from being a nice cozy town to a big bad city. There are people out there that do not share your values and either want to profit from stolen data or see how destructive they can be.
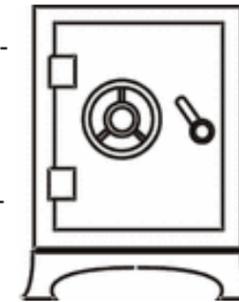
Here are ten essential methods of protecting one of your most important assets … your corporate data. While there are no guarantees, by implementing all items on the list your company will be far more secure and will potentially avoid down time and expense to recover from an attack that could have easily been prevented.

1. Ensure that there is physical security to your servers and backup tapes. If someone takes a backup tape (or one of your servers itself!), all of your confidential documents are gone.
2. Ensure that your data backups are functioning properly each and every day. Sometimes the only way to recover from an attack is a complete restore. If you do not have a recent good backup, you are out of luck.
3. Put in a firewall and ensure that it is configured as restrictively as possible. Best practices dictate a hardware firewall such as Sonic Wall, WatchGuard, Cisco PIX, or Microsoft ISA in front of the internet connection and a software firewall such as that found in Norton Internet Security on each pc.
4. Keep all operating systems on servers and workstations up-to-date. You must download and apply full service packs manually but can have the Microsoft Windows Update site notify each user that interim patches are available and action is required. Service Pack 4 is out for Windows 2000. Service Pack 1 is available for Windows XP Pro and Service Pack 2 will soon be released for this operating system. Note, occasionally a patch creates problems depending on the state of your pc when it was installed. Make sure that System Restore is turned on if you are running Windows XP Pro before installing patches.
5. Ensure that you have a corporate-wide antivirus strategy. The server should obtain its updates from the manufacturer and then the workstations automatically obtain their updates from the server. The two programs we like are Computer Associates InnoculatIT and Norton Antivirus Corporate Edition. We also highly recommend a first level of defense against email-based viruses through use of a low cost internet-based mail filtering service that will also filter SPAM email.

Management Letter

There is dark side to human nature. Society establishes rules that the vast majority agree are good. Things like … 'Do not steal, intentionally harm, or destroy someone else's property.' So why do people do these things? The answer is probably longer than the space of this column.

The real question is, what can you do to protect yourself? This issue of *The Next Wave* focuses on some of the most basic steps you can take. We urge each of you to examine the security protecting your information technology systems and data, and to call us if you have questions. We have assisted in more than one server rebuild from hack attacks or virus attacks. As the old expression goes, an ounce of prevention is worth a pound of cure.

CRM (Customer Relationship Management) and ERP (Enterprise Resource Planning) systems continue to improve. Inside you will find information about accessing GoldMine via the internet and a new release of Macola.

Happy Computing,

Steve Rogers

Look Inside…

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- iGoldmine
- Macola Progression 7.6.300
- Upcoming Training Schedule

Page Four:
- Looking for a cell phone?

Security

6. Prepare a written policy statement and provide training on potential social engineering threats. Spammers are getting very clever on finding out whom you typically correspond with and it is not unusual to get an email that purports to be from someone you know but is not. Tell company employees to not open any suspicious email and especially not to open any attachments they are not expecting. In addition, if they get a call on the telephone from someone purporting to be from the computer tech support group or from a vendor of a software they are using, be cautious. Train employees on proper settings for internet explorer, to not click on pop up messages, and to only download files that are needed for business purposes.
7. Install a spyware remover on each pc and instruct users to run it regularly. Spybot Search and Destroy is a good one and it is free unless you want to make a donation to the author ☺ .
8. Lock down security on your network. We believe it is more important to have secure passwords than to constantly be changing them. The password should be approximately eight characters, have uppercase and lower case characters, have at least one unusual symbol, and at least one number. Also, it should be memorable so that the user does not need to write it down on a post-it note and stick it to his or her monitor.
9. Remove all sources of external file sharing such as kazaa or gnutella. If you are going to permit users to use an instant messaging product, ensure that file sharing capabilities are disabled or install centralized software to enforce the policy.
10. Review points one through nine at least once each quarter and take immediate corrective actions.

Hot New Cell Phone

Looking for a new cell phone? Check out the PalmOne Treo 600. It's a cell phone and complete Palm based PDA rolled into one small device. With optional service, it permits wireless access to web, email, and text messaging. There are several versions available for the various networks including Sprint, Verizon Wireless, Cingular Wireless, and AT&T Wireless. One of its coolest features is an integrated full QWERTY keyboard. It takes a little getting use to typing with your thumbs, but it's definitely useable. The price ranges from $450 to $700 depending if you get it with a service plan.