GoldMine Training

SPECIAL DISCOUNTS
10% off 2nd attendee, 20% off 3rd attendee, 30% off 4th+ attendee*

Introduction to GoldMine
11/4, 12/2
Topics include: working with contacts, managing activities and letter writing.

Intermediate GoldMine Functionality
11/11, 12/9
Topics include: Working with data subsets including filter and group creating and performing tasks.

Advanced GoldMine Features
11/18, 12/16
Topics include: the opportunity/Project Manager, GoldMine Report Writer and Automated processes basics

Administrative Capabilities
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! 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 .

CRM Integration

One of the most common questions we are asked is related to integrating your CRM products with other important systems or databases. Some clients want to see order history in their CRM system. In the case of GoldMine, they want a history record created with the order information and line items. In other cases, clients want to simply see a summary of accounting information such as AR Balance, Year-To-Date Sales, Prior Year Sales, Credit Limit, etc. In these cases we are able to setup a daily import from the accounting system to the CRM system.

Over the years Beachwood Systems Consulting, Inc. has become very adept in integrating systems. Our vast expertise affords us the ability to tackle these challenges quickly and efficiently for our clients. In some cases the solution requires custom software to be developed. In other cases add-on software is the answer.

1.) Information Organization - When considering integration, your first decision is to determine what information needs to be shared. You should prepare some documentation on what information you have available, what groups of people need access to different information, as well as where and how the information is currently stored. The ability to map out the different information silos along with your human resources enables you to identify what information each group or role should have access to.

2.) Delivery - Once you have the information you want to share determined and the resources that need to access it, you need to determine delivery. When it comes to delivery you need to determine whether you want real-time access or if a batch update is sufficient. In a batch up-

date mode, the information is exported from one system and imported into another periodically. This might be order history being exported nightly from the accounting system and imported into your CRM system. The only problem this method presents is that you are unable to see any new activity since the last update – so, any orders entered today would not be in the CRM system until tomorrow. The Real-Time access model affords you the ability to display pertinent data alongside or within one system when it is actually from another. Using order history as an example, you could view the line items or invoice header in a separate window in or beside your CRM application.

3.) Presentation – Now we determine the best format to present the data in. Your delivery method above will directly impact what formats you have available. In a batch mode, you can use custom fields to store information or a report can be accessible from within the CRM system. If you choose real-time access, you can take advantage of GoldMine's new GM+View tab or Microsoft CRM's ability to add custom code. There is also an option to have the system email you when important events occur in your systems. For example, you want the sales rep listed for an account in the CRM system to be emailed every time an order is shipped.

Most clients are surprised at how well their systems can be integrated. In many cases, the cost involved in integrating systems is minimal. In some cases, where custom code or other challenges are present, the cost is higher. If you have integration questions, contact Scott Clark at (216) 823-1800 x 142 or *clark@beachsys.com*.

Exact Software's Advanced Graphical Scheduling for Macola

In today's high velocity, global economy, it is no longer enough to say that you have the ability to deliver a product. And if this promise relies on the use of scarce resources (human, material, facility, utility, etc…) within your organization, you need to be able to react quickly to changes in process and product with minimum disruption. You need to maximize customer service levels and minimize costs within your operation.

Exact Advanced Graphical Scheduling (AGS) benefits from world class designs and implements state-of-the-art technology within its solution. It uses an intuitive user interface that is tightly integrated to the Exact Macola Progression or Macola ES back office system. You have the ability to see and respond to changes on your shop floor quickly and efficiently.

Realizing that every company has different needs and philosophies regarding production scheduling, Exact has a multi-tier solution that will fit your particular needs and can grow with your organization. Whether you believe in Forward or Backward Finite Theory of Constraints, Exact AGS has the ability to drive your planning and scheduling as you desire.

Deliver better more consistent levels of customer service to improve profitability.

Several models of AGS are available to meet your specific needs:
AGS200
- User definable operation and product attributes
- Plot the usage of additional resources such as labor, tools, etc.
- Set up or changeover times that are sequence dependent.

- Transfer batching between operations (overlapping operations)

AGS300
- Multiple constraints during the scheduling process e.g. machine and labor etc.
- Define capabilities as a constraint
- Limit the resources that can be selected based on previous resources selected
- Limit the start of an operation based on the previous operation start/finish
- Incorporate assembly/ disassembly BOM structures within a single user.

AGS400
- Use BOM data structures to peg or allocate materials from one or more producing orders to one or more consuming orders.
- Use pegging rules to define which consuming and producing orders can be linked together
- Limit the start of consuming orders based on completion time of producing orders
- Use complex "optimization" dispatching scheduling rules to, for example, introduce preferred color sequencing to minimize set up time, or minimize work in process.

This is an additional module for Exact software. AGS is a Preactor product supported by Exact Software. For more information or a demonstration contact Gary Baum at 216-823-1800 ext. 103 or e-mail *baum@beachsys.com* with any questions you may have.

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Accounting
11/16-11/18
Day 1: General Ledger & Month End/Year End
Day 2: Accounts Payable
Day 3: AR/Bank Book

Distribution
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)
12/7-12/9
Day 1: Inventory & BOM & Production Order Processing
Day 2: Master Scheduling / MRP
Day 3: Processing Transactions

ERP Manufacturing
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
11/10-11/11
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 for details and current schedule information.

Beachwood Systems Consulting

Getting your Email on the Road

Email, even with all of its problems, is vital to business today. Businesses are becoming increasingly more virtual. The ability to get corporate email from a remote office, while on the road, or at home is obvious. This article describes accessing remote email using pc's and wireless devices.

There are many options for getting your work email while away from the office. Most companies use either Microsoft Exchange or Lotus Domino for the server component. Both of these communications platforms have a pure web client available. In the case of Exchange, the functionality of the new Outlook Web Access for Exchange Server 2003 is very comparable to the Outlook client itself. Options to retrieve email remotely include: 1) use of a standard browser to access the server's web interface, 2) directly via the internet using the Outlook 2003 client which is especially nice because all data is cached on the local drive of your notebook, 3) similar to option two but using a VPN, and 4) using Terminal Services (RDP) or Citrix. There are other options as well.

Research in Motion (RIM)'s **Blackberry** technology has always been a leader in delivering email to wireless, handheld devices. Most recently the company has introduced combination phone and email devices such as the 7100t that utilizes T-Mobile's GSM network. On the corporate side the Blackberry for Exchange Server (BES) software is loaded on a server. This software parses each email to put the body and attachments into a format acceptable for the Blackberry device. It then forwards the email through the network and is received on the handheld when it gets in range. You can reply and compose new email from the handheld as well and your mail box in Exchange will stay synchronized. As an alternative to BES, there is a desktop redirector that runs on your pc but you must leave your pc on when you want it to work.

Other phone vendors have gotten into the game too. PalmOne teamed up with several cellular carriers with its popular Treo600 phone to be able to push or pull email from an Exchange server to the phone. Separate from the cellular carrier's email solutions, are independent solutions similar to Blackbery's. Good Technology's Good Link is an enterprise solution that connects Palm based phones to Outlook. In Box to Go is another solution that polls your In-Box.

Siera Wireless has introduced the Voq Professional Phone A11 and a push style email technology called

Management Letter

The lead article for this issue of *The Next Wave* is on different methods to get your work email while away from your office, either from a pc or a wireless device. If having access to email while away from your office is important to you, rest assured that there is a way to do it.

With all of the great software on the market today, perhaps you find yourself in the same situation that many do. How do you link them together? Beachwood Systems has integrated separate systems dozens and dozens of times for clients. These integrations are well thought out, seamless, and stable.

Viruses, spam, and spyware remain the top three problems computer users face. For most companies, the problem of viruses and spam can be greatly alleviated very inexpensively. See the article on the back page for information.

It is hard to believe that the holidays are quickly approaching. All of us at Beachwood Systems wish all of you a safe and happy holiday season.
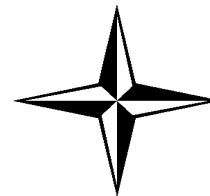
Adam Ryan

Virus / Spam Prevention

A couple of months ago, Beachwood Systems announced that it is offering an internet based service that intercepts a company's email and filters out spam and email that contain viruses. Since then 10 clients have signed up for the service, all providing very positive feedback. Listen to what Pam Noble, President of Noble Pension Consulting has to say: "Several of us were being inundated by spam… and not just of the advertising variety either. Once we put Beachwood's internet filtering service in place it was virtually gone. I can't think of a better value for $60 anywhere."

The beauty of the solution is that it stops the spam before it gets to your email server, reducing the load on your server and freeing your internet bandwidth. In addition the service provides a first level of defense against email-based viruses. If you have ever had your email server or network pc's infected by a virus, you will know that this feature alone is worth ten times its price.

The service is rated number one in the industry and does a great job at identifying and quarantining spam, and letting the real email go through. Call us to learn more about this inexpensive and highly effective product.

Voq Mail. The phone uses Microsoft's operating system specifically designed for phones called Microsoft Windows Mobile for Smartphone 2003. It offers an email application similar to Outlook and permits syncing with Exchange and Outlook.

Microsoft has a technology called Outlook Mobile Access (OMA) that permits access to Exchange email, contacts, calendar, tasks, address book, using a browser in a mobile device. Another feature that can be used from a smart phone based on Window Mobile 2003 is Exchange ActiveSync (EAS) that permits you to synchronize.

As is frequently the case today, there are several good choices. If you'd like some help analyzing the best solution for your corporate email needs, Beachwood Systems is available to assist.