

a bit more affordable. Microsoft has committed to upgrading the product, so expect upcoming versions to fill in the gaps.

VNC (Virtual Network Computing) software makes it possible to view and fully-interact with one computer from any other computer or mobile device anywhere on the internet. VNC is cross-platform, allowing remote control between different types of computers. For ultimate simplicity, there is even a Java viewer, so that any desktop can be controlled remotely from within a browser without having to install software. VNC offers a free version which from our experience works pretty well. A professional version is also available.

The vendor websites for more information are:

- [www.webex.com](http://www.webex.com)
- [www.microsoft.com](http://www.microsoft.com)
- [www.realvnc.com](http://www.realvnc.com)

## VPN Blues

As working from home and on the road becomes ever more the rule, many are turning to Virtual Private Networks (VPNs) to obtain a secure and encrypted connection from a remote computer to the office network. If you are having troubles connecting from home or elsewhere you may be experiencing an increasingly common problem.

The internet numbering scheme permits each company to have one or more unique "external" internet IP addresses (e.g. 11.22.33.44). However, behind a company's firewall there are only three broad ranges specified for setting up "internal" numbers and thus they are often not unique across companies. Today it is very common for users to have a router at home that passes out internal addresses (e.g. 192.168.1.1). The same is true with hotels and coffee

shops. The problem is that you cannot use a VPN when both ends have the same basic numbering scheme.

The solution? One end of the VPN connection must be changed. For home users it is relatively easy – just change the network setting on your small home network. For those going through hotels and the like, the problem is a bit bigger. Your company's network address scheme must be changed to a more unusual group of numbers. This can take some time and is best done during non-working hours. As a temporary workaround, use a dial-up connection. Yes, dial-up. It is slow but its address will almost never cause a problem.

Feel free to call if you want to discuss your options in more detail.



**Beachwood  
Systems  
Consulting**

# The Next Wave

WWW.BEACHSYS.COM

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

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## Management Letter

It's a wild and wacky world we live in. Had you even heard of the Web 15 years ago? Now our lives are wrapped around it.

Everything is going Web. For instance the lead article of this issue of *The Next Wave* describes how you can hold a meeting on-line. Often times this format consists of a person displaying a PowerPoint presentation and then flipping to something else on his or her computer's screen that they want participants to see.

The internet permits you remote access to a large portion of company resources from anywhere. On the back page you will read about an increasingly common problem experienced by users connecting to their company's network.

And, on page 3 you will read about e-Synergy. e-Synergy is a completely Web based system that unifies business. It's the natural evolution from email and in a class of its own.

As always, feel free to call or drop us an email to explore how these technologies can benefit your firm.

Adam Ryan

Beachwood Systems Consulting is a full service Information Technology 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, SQL, and Seagate Crystal Reports.

## On-Line Web Meetings to the Rescue

The combination of 9-11 and higher fuel costs has exacted a toll on corporate travel in the United States. Foreign competition drives the never ending need for greater efficiencies. The days of getting on a plane, flying to a meeting and returning, even the same day, have dramatically reduced.

In a previous issue of *The Next Wave* we discussed how video conferencing is becoming more common. In this issue we describe web conferencing. Research tells us that there has been a 40 percent increase in web conferencing in the past several years.

As with many other technology driven changes, the first few systems were high end, expensive and difficult to use. Now anyone with a browser and an internet connection can fire up a Web conference without special equipment and expect it to work even through firewalls.

How does this web meeting concept work? First of all you need to select a vendor that provides this kind of service. They all work basically the same. You set up a meeting on-line through the internet. You will provide a meeting name, date and time. A meeting password is always a good idea. Most software will e-mail the attendees you establish, the information they need to sign on through their internet browser. As the meeting host you will see who has logged-on and records are kept for attendees.

The voice component may very well be separate from the meeting

arrangements. There are a variety of services that can set up conference calling capabilities so each attendee can ask or answer questions. Some advanced suppliers of this service, such as Raindance Web Conferencing offers the voice component as well.

There are many companies that provide the service. Below are a few.

**WebEX Meeting Center** was the first and is now the largest provider. Some studies say they have 60% of the market. Along with providing web conferencing capabilities, they also have modules for more targeted needs: *Training Center* for education; *Support Center* for customer support; and *Event Center* for large Webcasts. WebEX however is pricy and may not be as appropriate for the casual meeting environment.

**Microsoft Office Live Meeting-** Microsoft recently acquired PlaceWare, a major Web conferencing player and immediately became a substantial vendor in this environment. The price: Presenter edition \$75.00 per seat per month or \$.35 per minute...

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Formworks for Goldmine  
Exact Dealer Meeting  
Training Schedules

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Trouble with your VPN?



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## GoldMine Training

### SPECIAL DISCOUNTS

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

#### Introduction to GoldMine

5/5, 7/7

Topics include: working with contacts, managing activities and letter writing.

#### Intermediate GoldMine Functionality

5/12, 7/14

Topics include: Working with data subsets including filter and group creating and performing tasks.

#### Advanced GoldMine Features

5/19, 7/21

Topics include: the opportunity/Project Manager, GoldMine Report Writer and Automated processes basics

#### Power User Package

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

The following classes are available on demand:

#### Administrative Capabilities

Topics covered are designed to help your IT staff administer GoldMine

#### 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! Take time to obtain systematic knowledge that has a year after year Return-On-Investment. For costs, student discount information, and class schedules for upcoming **GoldMine training classes** please call or visit our website: [www.beachsys.com](http://www.beachsys.com).

## Data Security in Microsoft CRM

Microsoft CRM software allows you to maintain all vital information about your customers, partners, vendors, and even employees. Some, if not most, of this information can be confidential or sensitive. The benefit of effectively using Microsoft CRM is phenomenal, however, without proper planning there can also be drawbacks.

One major concern is ensuring the security of the information to prevent it from getting damaged or into the wrong hands. For example, inexperienced workers may damage the data by accidental deletion or corrupt the integrity of the system by incorrect data input, while a disgruntled employee may purposefully damage company data.

The following are some items to keep in mind to ensure proper data security within Microsoft CRM.

- Require that all users use “strong” passwords for their account logins.
- When setting up Microsoft CRM, divide your organization into business units that match the organizational struc-

ture. This makes it easier to restrict access based on roles.

- Assign all users with roles with the minimum access levels and access rights required for them to do their jobs. Do not create user accounts that multiple employees would use.
- If a user needs additional access levels or rights, create a new role with those specific privileges and add the user to the new role. Don't grant the original role additional privileges that are needed only by one or a few members.
- When appropriate, use sharing to give specific users, specific rights on individual objects, rather than broader privileges on all objects of a given type.
- Use teams to create cross-functional groups, so that specific objects can be shared with the team.
- Train users who have sharing access rights to share the minimum information needed.

## Formwerks for GoldMine Improves Speed of Business

Formwerks has enabled hundreds of companies including Financial Advisors, Insurance Agents and Real Estate Agents to improve the speed and efficiency with which they do business. Want to find out if it can help you in the same way? If one of the following scenarios sounds familiar to you, the answer to this question should be “Yes”.

**Scenario One** – You use a number of PDF forms which you send to your clients or prospective clients to fill out. You then enter this information into your GoldMine system manually. In GoldMine, the multiple screens may cause you to miss input of data or users may input it wrong. With Formwerks you can create a form and e-mail it to your new client. The client then completes the form and clicks on a submit button which will email the completed form back to you. When you receive it, you can open it and create a new record in GoldMine automatically.

**Scenario Two** – You need to collect a large amount of data when creating a new client record, which may require you to utilize multiple screens within GoldMine. With FormWerks you can create a form that contains all the required information on one screen. Users can then click on one button and create the new record filling in the required fields, no matter where they are located in the database.

**Scenario Three**– You frequently need to create form documents from data you already have in GoldMine. With non-integrated form software, you need to manually type the information into the form. Using Formwerks you can pull up a Formwerks form and automatically have the information fill into the correct places.

Formwerks works with Acrobat 6.0. Please contact the Beachwood Systems CRM Team for more information on this or other add-on products for GoldMine.

## Announcements from Exact Software's Annual Dealer Meeting

Each year Exact holds an annual meeting for all its certified dealers in the United States. These meetings have always been well run and a source of important information. Here are some of the highlights from this year's meeting.

Exact Software now has over 2,000 employees located in 60 countries. Its software is used at over 100,000 sites world wide. In North America alone it is used at over 10,000 sites.

Globe Enterprise is Exact's accounting, distribution, and light manufacturing product that has primarily been used internationally. It will be introduced in North America this fall. The main reason for the decision is to provide companies with locations around the world to run the same software in North America as well, and be able to obtain local support. The Macola product family will remain the focus for sales in North America and there is no planned upgrade path from Macola to Globe Enterprise.

Service Pack B is under development for Macola Progression version 7.6.300. Functionality for Progression will continue to be enhanced, some of which will be found in Service Pack C at a later date.

The conversion utility for Macola ES has been utilized successfully many times and was presented to the dealer channel in a formal program for its use.

E-Synergy, Exact Software's work-flow, project management, and document management software, continues to be the star of the show. There are now some 4,500 e-Synergy sites world-wide. This is a remarkable statistic given that the system was only released a little over three years ago. The real benefit of e-Synergy is from the better utilization and management of people re-

sources. For example, studies show that without an e-Synergy type product, it takes three internal people to support 10 external people. With e-Synergy the ratio can go down to one internal person to support 10 external people... really some dramatic savings. As companies face higher employee turnover, e-synergy can reduce training time by standardizing processes.

E-Synergy can be customized in a number of ways with built in functionality as well its new series of add-on vertical applications. For environments having very unique requirements, Exact has released its Software Development Kit (SDK) to permit dealers and end-customers to develop specific functionality.

EDI processing just got easier. Exact's new EDI module enables users to complete the EDI process in fewer steps and less time by providing all of the functions in a single application. Sterling Gentrans will still be supported but all new sites will utilize the new solution.

A new release of Exact's Warehouse Management System is out and includes integration to POP and Shop Floor. In addition, the ability to print RFID tags to a printer has been added.

Exact's Advanced Scheduling module will be released before the end of second quarter 2005 for Macola ES. It is a finite capacity scheduling system.

The new Business Analytics module will help you monitor performance indicators you establish so that you can measure progress toward company goals.

For more information, please do not hesitate to contact Gary Baum at 216-823-1800.



## 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

6/21-6/23

Day 1: General Ledger and Month End/Year End

Day 2: Accounts Payable

Day 3: AR/Bank Book

#### Distribution

7/12-7/15

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)

6/14-6/16

Day 1: Inventory & BOM & Production Order Processing

Day 2: Master Scheduling / MRP

Day 3: Processing Transactions

#### ERP Manufacturing

7/19-7/22

Day 1: Inventory & BOM

Day 2: Standard Product Routing

Day 3: Shop Floor Control

Day 4: Manufacturing Cost Accounting

#### System Administration

6/2-6/3

Day 1: System Manager

Day 2: Database Tips, Client Setup,

File Purging, & Troubleshooting

#### Crystal Reports for Macola

6/7-6/8

Day 1: Creating Reports and Selecting and Sorting Records

Day 2: Creating Formulas, Formatting Sections, and Presentation Quality Reports

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