

Server is down. Hard drive crashed. Last backup 11 days old.

What would you do? You come in Tuesday morning and your main file and print server is down. You learn that the hard drive has failed. You also learn that the last good backup was 11 days ago.

Your staff person had been changing the tape each day, but failed to check the backup log. Think this is a far fetched scenario? Think again. We have seen it several times. What do you do now? How long would it take you to recreate the last 11 days of work? How long would it take you to resolve problems arising from the inaccurate recreation of that work? What if it was not 11 days but rather three months?!

You do not need to ever be in this situation. It takes about 5 minutes to check the log, record two or three key statistics into a calendar and change the tape each day. It has to be done consistently and so we recommend assigning the task to a staff person who is very detailed oriented and has tendencies toward being a perfectionist. He or she does not need to have strong computer skills. This person needs to be instructed to notify your network administrator or consultant immediately when something is not right and be charged with continuing to escalate the issue until it is resolved.

Other good policies to have in place relating to protecting one of your most valuable assets is to ensure that at least once per week a tape is taken off-site. We highly recommend use of a locking fire-proof or fire-resistant box to store tapes in on-site. Tapes should be set up in a "monthly - weekly - daily" rotation so that you can go back in time to restore from if necessary. A test restore should be done once per month. We've been amazed at the lack of concern that management and owners in some companies have regarding backups. We hope you will learn from this article, and not from the school of hard knocks! ✦



**Beachwood
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Using Outlook with GoldMine

The Perfect Marriage

The perfect marriage: combining the excellent contact management / CRM capabilities of GoldMine with the industry standard email client of Outlook makes for the ultimate management tool for your customer interaction.

GoldMine has advanced calendar functions and allows for complete contact information, activity tracking, relationships, and reporting. It also has a very fine built-in email client. If your corporate standard permits use of GoldMine's email client, your total solution is accomplished - *all correspondence*, contact information, calendar information, and sales information *is in one place*. However, there are some 70 million Outlook users, many of whom have been instructed by Corporate IT policy to use Outlook for email. What are the GoldMine users suppose to do? Without any level of integration, there will be two places to look for correspondence: in GoldMine history and in Outlook send and receive folders. This article explores how GoldMine straight out of the box integrates with Outlook, describes two third party products that increase the integration, and addresses recently announced integration products from FrontRange Solutions.

Current Default GoldMine and Outlook Integration

GoldMine's email client works with most email servers, including

Microsoft Exchange, via SMTP and POP3 to provide users the ability to send and receive both local and internet email. When these messages are sent or received they can be automatically linked to their associated contact record via the email address. GoldMine also allows users to set up client rules to process incoming and outgoing email messages.

On the inbound side for users also using Outlook, GoldMine provides the ability to browse that user's Outlook folders from within the GoldMine email center. This means that a user can use Outlook to receive all emails and then selectively mark which messages should be brought into GoldMine. Messages are copied into their GoldMine inbox from Outlook's inbox (or another Outlook folder) and linked to GoldMine contact records via the email address. This process does not remove the email



Management Letter

Software is much better today when it comes to integration. There have been many standards developed such as OLE and ODBC that permit applications developed by different software houses to work together. Your company, like most, has its own set of requirements and sometimes using the best of breed approach gets you most of the way there. The main article in this issue of *The Next Wave* describes how GoldMine and Microsoft Outlook can work together. It was written by Scott Clark, our GoldMine Practice Area Leader. If you have any questions about your options I'm sure Scott will be happy to address them.

We are here to help you succeed. Our company slogan is "Beachwood Systems delivers on the promises it makes." And as you may know from personal experience, in the world of information technology that is not always easy to do. If you have an idea or a project that can make your company more efficient, please call and we will be happy to discuss the opportunity.

Sincerely,
Steve Rogers

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



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Look Inside...

Pages Two and Three:

- Tech Tips and Tricks
- Training Classes
- Special Promotions!

Page Four:

- Are you sure your system is getting backed up?

Tips and Tricks for



A convenient and easy way to send an email to a small number of recipients is to add them to an Email Distribution List. This is similar to an address book found in other email programs. You may add GoldMine Contacts and Users, as well manual recipients to your lists. Each user can create their own Private Distribution Lists and those users with the proper user rights can create Public Distribution Lists for others to use.

To begin to utilize the distribution lists click on the Dist. List Icon on your Email Center toolbar. This will bring you to the Distribution List Center. From here right click on the Private/Public List Icon. Choose New Distribution List from the menu. Enter a name for the list such as *Executives List*. To add contacts to this list right click on the list and choose Add Contact, Add Contact's Email, Add User, or Add Manual Recipient Email Address. Then follow the steps to set up. Repeat these steps to add additional items.

When sending an email, you can choose the right pointing arrow next to your "To" field. From the list that appears choose Distribution List. Select the Distribution List you wish to send the email to. Type your message or choose an email template and then send as usual.

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For information on upcoming **GoldMine training classes**, please visit our web site: www.beachsys.com.

(Using Outlook with GoldMine - continued from page 1)

from the Outlook folder.

On the outbound side, there is a way while in GoldMine to create an email directly with Outlook. GoldMine allows you to create a new Outlook message filling in the email address of the current record's primary email address. When sent, GoldMine will create a history item noting that a message was sent via Outlook to the contact, but does not retain the body or subject of the email.

Some of our clients use default GoldMine and Outlook together as follows: 1) receive all emails into Outlook and selectively mark and bring in only the ones that relate to a customer, prospect, vendor, or partner in their GoldMine database. They leave the rest of general emails in Outlook so as not to clutter GoldMine.

2) When sending an email to anyone in their GoldMine database, they use the GoldMine email client that auto-links the communication to the contact's master record.

3) When sending an email to anyone not in their GoldMine database, they use Outlook.

What if you only want to use Outlook for email?

If your corporate email system decreases the use of Outlook you are still in luck. The recent release of GoldLook from RT Group, Inc. enables you to automatically or manually link your sent and received email to your GoldMine contacts. This is an inexpensive and easy to use add-in. GoldLook is ever designed to afford non-GoldMine users the ability to link email sent or received in Outlook to a contact's

history. When an email is received from someone that does not have the same email address set up in GoldMine, the user is prompted with several options including: finding the contact and assigning the email address to that contact; adding a new contact; or simply not linking the message. GoldLook only supports Outlook 2000 and newer. Certain system components are required to be installed on the user's workstation.

FrontRange has developed a product called GoldMine Link for Outlook that will be going into beta testing shortly. This product will only work with GoldMine Front Office Sales and Marketing. We are told it will not operate with GoldMine v5.7. Anticipated functionality is shown in the table below.

Function	GoldMine v5.7	GM Link for Outlook	Gold Look	Gold Exchange
Initiate Outlook email in GM	✓			
Initiate Outlook email in GM and auto update history w/ body		✓		✓
Update GM history manually with email created in Outlook	✓	✓	✓	
Update GM history automatically w/ emails created in Outlook		✓	✓	
Select GM contacts and groups from Outlook		✓		✓
Update GM history manually w/ emails received in Outlook	✓	✓	✓	
Update GM history automatically w/ email received in Outlook		✓	✓	✓
Create new GM contact record from within Outlook		✓		✓

What about Outlook calendar and contacts?

If your workgroup uses Outlook for more than just email such as shared calendars and shared address books, another 3rd Party solution may be in order. GoldExchange from NEMX Software Corporation allows integration of Outlook email, calendars, and address books for companies with a Microsoft Exchange server. Users can work in the application they choose and

have their calendar information synchronize to the other application as they work. If a non-GoldMine user enters an appointment or other supported calendar activity in Outlook for a GoldMine user, the activity will automatically appear on the GoldMine user's calendar. Similar to GoldLook above, GoldExchange will link your outgoing email from Outlook into your GoldMine history. The software also specially marks messages associated with GoldMine contacts in your Outlook inbox and sent items folders.

FrontRange Solutions has announced a new product called GoldMine Link for Exchange that is similar in nature to Gold Exchange. One key difference is that GoldMine Link for Exchange will only work with the FrontOffice Sales & Marketing version of

GoldMine. It is comprised of a "service" that loads on an NT server and synchronizes both contacts and calendars between GoldMine and Exchange. Anticipated release is May or June of this year.

* * * * *

If you have come to realize the power of GoldMine, you know the value of being able to see the whole picture for a contact in your database. GoldMine combined with soon to be released functionality or an existing add-on product means that Outlook users are no longer left on the outside looking in. ✦

Macola Tech Tip

The Visual Resource Planner is a powerful tool at the heart of Capacity Requirement Planning in Progression. Recent improvements to the Planner give users the option to "Allow Scheduling Across Departments," if the corresponding check box is activated on the filtering screen. Executing this option will put all operations into a single view and allow cross - departmental adjustments.

Within the Planner, predecessor operations are moved back of an operation if pulled back in time; successor operations are moved forward if the operation is pushed ahead. Unless the new option is selected, each department will be presented in its own view window and the related shifting is restricted to the operations being performed within the same department as is the operation being moved. ✦

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MACOLA PROMOTIONS!

Great news for Progression v7.5 and v7.6 sites using Pervasive Btrieve as their database engine. Now until March 31, 2002, the cost to upgrade to the SQL version of Macola is only \$350 per user. As an additional incentive, your company can choose between a free core accounting, distribution, or manufacturing module to add to your system, or five free additional users for each registered core module!

Still running Macola version 6.3? Version 6.3 support ends on March 31, 2002. From now until March 31, 2002 you can upgrade your Macola version 6.3 system to Progression SQL version 7.6 for \$350 per user and are entitled to one of the same free options described above plus a 90 day support extension on v6.3. Call us today for more details. ✦



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

* Please see our web site, www.beachsys.com for details and current schedule information.