

while we are talking about ScanSoft, check out their PDF Converter Pro 3 software that competes with Adobe Acrobat Professional v7.

A product traditionally popular in the law firm industry is WorldDox. It integrates with Microsoft Office and incorporates document management and email management.

Exact Software's e-Synergy module offers the features described above and much more. e-Synergy includes document management capabilities, indexing, and secure distribution to customers and employees. If you are looking for a system to integrate with a back-office accounting program, this is one to consider.

Here are some web sites you may want to investigate:

- [www.worlddox.com](http://www.worlddox.com)
- [www.adobe.com](http://www.adobe.com)
- [www.scansoft.com](http://www.scansoft.com)
- [www.macola.com](http://www.macola.com)

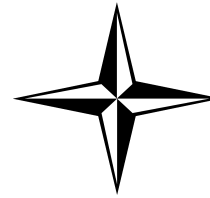
## Phishing = Identity Theft

Phishing is the act of sending an e-mail to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft. The e-mail directs the user to visit a web site where they are asked to update personal information, such as passwords, credit card, social security, and bank account numbers, that the legitimate organization already has. The Web site, however is bogus and set up only to steal the user's information. These web sites look official with realistic logos and design. For example, we have recently seen a proliferation of a phishing scam in which users received e-mails supposedly from eBay claiming that the user's account was about to be suspended unless he clicked on the provided link and updated the credit

card information that the genuine eBay already had.

Some items to remember:

- It is not safe to enter personal or financial information into pop-up windows.
- Check with the institution in question to be sure this is a legitimate request.
- Most Phishing e-mails do not use your name. They often say "Dear Valued Customer"- a clear warning.
- Run anti-spyware software and keep it current. Spy-Sweeper and CounterSpy are good ones.
- Run antivirus software. Although antivirus software can't prevent you from opening fraudulent e-mail, it can help stop any viruses that may result.



Beachwood  
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# The Next Wave

WWW.BEACHSYS.COM

A Newsletter about PC Network issues, Business Applications, and Software Development

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## Document Management Improves Efficiency

Streamlining business processes and increasing productivity are fundamental concerns for any organization. Just like any system implementation, a new approach to document management for your company requires planning and establishing goals and objectives through a requirements definition process. Clearly, document and records management software has many benefits that can appreciably improve organizational efficiency. Today there are more software options available to you in this area than you might imagine.

Document management begins with the conversion of paper or other documents into digitized images. These images can be easily organized, indexed, quickly retrieved, and archived. When files are scanned or electronically converted, a high-resolution digital copy is stored on a hard drive or optical disc. Templates, or electronic index cards, can attach information, such as author, reference number, date created, or key words to a document. Files can still be viewed, printed, shared and stored. Which documents people can read and what actions they can perform on these documents depend on the level of security that the system administrator has assigned to the user.

All document management systems have five basic components:

- **Capture** for bringing documents into the system. Scanning and importing electronic documents are the primary methods.

- **Media for storing** and archiving documents. With the cost of disk drives getting lower all the time, regular disks are becoming the primary method for storing documents. You do have a variety of formats to use such as .tiff or .pdf.
- **Indexing and retrieval** tools to locate documents. Here software solution can be customized and refined for your retrieval requirements.
- **Distribution** for exporting documents from the system. Every company has unique requirements in this area. You may need retrieval for employees. You may also have the need for customers to get access to manuals or design documents. The web is becoming the best way to make customer access secure and inexpensive.
- **Security** to protect documents from unauthorized access.

One of the most popular personal document management systems is PaperPort Professional made by ScanSoft. And

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### Management Letter

Its been a hot dry summer in Cleveland. Luckily that hasn't slowed down innovations in information technology.

This issue of *The Next Wave* contains info on new versions of market leading customer relationship management (CRM) systems. There are new versions of GoldMine and Microsoft CRM in the offing. If you don't have a CRM system in place, you should give it serious consideration.

Also, you will read about two horizontal technologies. Document Management has been around for quite awhile and many companies have good practices in place. WorkFlow Management is newer and is starting to become more mainstream. There are many benefits from both of these technologies.

Stay cool and don't complain because winter will be here before you know it!

*Steve Rogers*

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.



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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

9/1, 10/6

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

#### Intermediate GoldMine Functionality

8/11, 9/8, 10/13

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

#### Advanced GoldMine Features

8/18, 10/20

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 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).

## Goldmine v7.0 Anticipated Soon

The much anticipated release of GoldMine 7.0 is forecasted for the September/October timeframe. While few user interface enhancements have been made, this version is significant in its architectural changes under the hood and should be a part of nearly every GoldMine site's upgrade plans.

The major architectural changes stem from the desire to remove dependency on the Borland Database Engine (BDE). The BDE that the current versions use is older technology and has seen its fair share of problems over the years. The BDE is an intermediate piece of software that handles all communication with the database. Removing dependency on the BDE will make the software more stable, less restrictive, faster and more scalable. Common issues like the limit on the number of user-defined fields in the Corporate Edition will be eliminated (or at least dramatically improved).

The Corporate Edition will use some Microsoft and Windows based technology called ActiveX Data Objects (ADO) to communicate directly with Microsoft SQL Server. Using ADO means better and faster communication with the database server and also allows more efficient statements for reading data, reducing the overall load on the server.

The Standard Edition will use an open source SQL database server

called FireBird. FireBird is billed as a stable, robust SQL database platform. FireBird is an offshoot of the former InterBase code and made freely available. InterBase was a leading enterprise database server for many years prior to the Microsoft SQL Server success in the marketplace. The FRS technical team feels very strongly about the FireBird engine and the improvements it brings to the standard version.

Synchronization now uses XML files to transfer data within the transfer sets. This is reported to allow better and more reliable transfer of data. The size of the files may be slightly larger, but most sync users will not notice the change.

Corporate Edition users who are current on their maintenance agreements are eligible to receive the new version. Standard Edition users are eligible for the upgrade as long as they are covered under an active UPP (Upgrade Protection Plan) subscription. Eligible users will be upgraded using new license codes. The procedure for receiving the new license codes is not yet apparent. We assume that the license codes will be issued or generated as part of the Update GoldMine function under the Help menu in the software.

If you have any add-ons, custom applications or custom reports – you may want to develop a test plan for working with the new version.

### Microsoft CRM Version 3.0 On the Way

Microsoft will release a new version of its CRM software around the end of this year. With the new version will come a special edition for small business and a subscription-based license for hosting services.

The software will come with two new modules: one to automate the management of direct marketing campaigns, and one to manage complex personnel and resource scheduling requests. Microsoft says "We want to be the easiest-to-use CRM system on the market place". Other additions pledged in 3.0 include increased support for the development of specialized applications for niche markets to be used with the CRM system. The package has expanded customization alternatives for use with specific business processes.

## Workflow Provides Consistency

**“Your customers want consistency. Automating routine tasks that traditionally are not automated, even with state-of-the-art accounting and ERP packages, provides your firm with reduced variability.”**

Workflow management is a tool to better manage and control many daily activities and projects that have never been automated before and can greatly impact the success of your business. By revealing the activities between people, workflow allows companies to have planning and control needed for an accountable and manageable picture of day-to-day operations and corporate projects.

First we need to understand workflow and how it works. You can think of workflow as the natural progression of e-mail. We humans thought we were pretty advanced with telephones to communicate. We then moved to faxes and then to e-mail. All, of course, are good tools but with one missing component: no easy way to follow up and be assured that the request was completed, and completed in a timely basis. There was no way to get an alert that a request was overdue. With workflow you can take your company to a new level of efficiency and customer service.

Let's look at just one example of a workflow item. You are attending a business show out of town and have met with a prospect that you have long tried to get as a customer. He is now interested and you want to get information to him on your products. Since many workflow systems are browser based, you use an internet connection to set a "Literature Request" workflow task for an associate to mail certain marketing items to this new prospect. Automatically the system sets up this task in the appropriated individual's "workflow."

They see it immediately and fulfill the request. When the workflow item is completed, you can see this as well as all other details. No need for follow up calls or e-mail to see if the item is completed. A list of work flow tasks is available for your review. In addition, a record of the item is kept so in the future you can review when certain material was delivered. Clearly a very cost effective way to communicate with associates and follow up.

The above example was one of an internal request. However, customers, dealers, or even vendors can be the originators of requests as well. For example, customer support issues can be tracked through the system.

A workflow task (requests) can consist of several steps. Each step is pre-assigned to an individual or "role" and flows to that entity. Tasks can be generalized as creation, approval, completion, or processing. There can be dozens and dozens of pre-defined request types waiting to be utilized.

By making individual workflows and corporate goals visible, an organization can spot redundancies and decrease errors, while at the same time increasing productivity. With accessibility to the same information and the same set of rules, your company can become more responsible, reliable and proficient.

If workflow intrigues you, call Gary Baum at 216-823-1800 for more information.

**“Automating your daily operations doesn't just eliminate waste and paperwork, it puts power and value into everything you do”**



## 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

10/25-10/27

Day 1: General Ledger and Month End/Year End

Day 2: Accounts Payable

Day 3: AR/Bank Book

#### Distribution

10/11-10/14

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)

11/15-11/17

Day 1: Inventory & BOM & Production Order Processing

Day 2: Master Scheduling / MRP

Day 3: Processing Transactions

#### ERP Manufacturing

11/8-11/11

Day 1: Inventory & BOM

Day 2: Standard Product Routing

Day 3: Shop Floor Control

Day 4: Manufacturing Cost Accounting

#### System Administration

9/7-9/8

Day 1: System Manager

Day 2: Database Tips, Client Setup,

File Purging, & Troubleshooting

#### Crystal Reports for Macola

8/30-8/31

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.